PURCHASING CONTRACT PROCEDURES

Start

**Need for service and vendor is identified. Multiple quotes may be required. See Approval Matrix for guidance. NO WORK TO BEGIN UNTIL STEP 5.**

**PREPARE CONTRACT**
Choose the appropriate District contract template. Complete the contract template before sending to vendor for signature.
- How to Determine the right Contract?
- Contract Templates
- Approval Matrix

**COLLECT REQUIRED SUPPORTING DOCUMENTS:**
1. Certificate of Insurance (COI)
2. Proposal or Quote
3. Fully Executed Contract
4. BEC, W9 Form
- Insurance Requirements
- BEC Form
- W9 Form

**ENTER REQUISITION**
Enter Requisition in Colleague. Upload supporting documents to Square 9. Notify Department Manager and Business Services to approve requisition.
- Requisition Guide
- Square 9 Instructions

**CLOSE OUT**
Upon completion of services, confirm all invoices are accounted for and paid. If BPO has remaining funds, request Purchasing to close the BPO to unencumber the funds.

**GENERATE PURCHASE ORDER**
Purchasing processes Purchase Order. Purchasing transmits fully executed contract and Purchase Order to vendor. SERVICES CAN NOW BE RENDERED.

**REVIEW & APPROVAL**
Business Services reviews, approves and notifies Purchasing. Purchasing reviews supporting documentation and works with department to correct deficiencies.

END