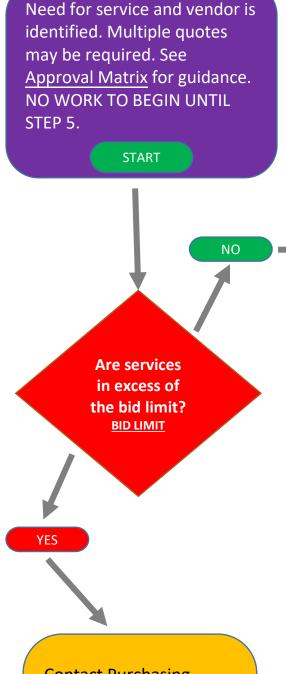
## PURCHASING CONTRACT PROCEDURES





Contact Purchasing ASAP. A formal public bid may be required. Typical lead time is 3-4 months. Proceed to Step 1 after Purchasing confirms procurement method.

### 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

<u>-Insurance Requirements</u> <u>-BEC Form</u> <u>-W9 Form</u>

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#### ENTER REQUISITION

Enter Requisition in Colleague. Upload supporting documents to Square 9. Notify Department Manager and Business Services to approve requisition.

-<u>Requisition Guide</u> -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.

END

#### 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 documenation and works with department to correct deficiencies.

> PURCHASING CONTRACT PROCEDURES SEPTEMBER 2021