

Highland Falls/Fort Montgomery Central School District

The purpose of the nVision purchase order system, where requisitions are submitted and approved before making a purchase, is to ensure that funds are available and the purchase is properly authorized.

Please note: Purchases without an approved purchase order goes against NYS Finance Law and/or Board Policy and will not be reimbursed by the district.

- 1) Discuss with your Building Principal or Department Head the item(s) or service(s) you require.
- 2) If initially approved by your Building Principal, present your request to the Requester in your building (usually the Main Office Secretary) to verify that the necessary funds are available.
- 3) For a service, a contract should be obtained specifying exactly what service is to be provided, when it will be provided, where it will be provided, and the cost of the service (see Note below). The contract must be on file in the Business Office and approved by the Purchasing Agent.
- 4) If the service will result in any interaction with students, Board of Education approval of the contract should be obtained before the service is rendered.
- 5) The Building Requester then enters a Purchase Requisition into nVision, the District's financial and human resources system.
- 6) Once entered into nVision, the Purchase Requisition is first approved by the Building Principal.
- 7) The second approval is processed in the Business Office after reviewing the requisition for accuracy (e.g., vendor code, budget code, sufficient description, adherence to Board policies, etc.).
- 8) The requisition then passes to the Purchasing Agent for final approval.
- 9) The approved requisition is then converted into a Purchase Order, and sent to the vendor for fulfillment. Please allow three (3) weeks for the Purchase Order process to be completed.
- 10) If the purchase order is for a workshop/conference/seminar an approved My Learning Plan submission is required for attachment to the purchase order.
- 11) Once the vendor delivers the all of item(s) or all services are completed, it is the responsibility of whoever began this process or a delegate signing on their behalf (see Step 1) to sign-off on the Receiving copy of the purchase order and return it to the Business Office for payment processing. Typically, payment should only be made for completed orders. When signing the purchase order, sign your full name, not just your initials, do not use black ink.
- 12) All vendors (e.g., consultants, repairmen, DJs, etc.) must present an invoice to be considered for payment.

Note:

When requesting services from a vendor (e.g., consultants, various "skill" instructors, speakers) please request a blank Form W-9 Request for Taxpayer Identification Number and Certification from the Business Office, and have the vendor complete that document first. This will help to assure that the correct entity is paid.