

How to buy something at LCS

General:

All purchases must be approved by a Principal or Supervisor and If purchase is for over \$1,000 or under \$1,000 but not in original budget the Director of Business and Finance or Head of School also needs to approve before item is ordered or purchased.

When completing one of the Forms mentioned below, you may attach documentation/print outs/screen shots instead of filling out by hand all the detail about the product if that is easier.

5 ways to buy:

Buying something from a vendor/company and they plan to send invoice/bill to the School.

Before item is ordered, a *Purchase Requisition Form* should be completed. A *Purchase Requisition Form* is documenting what is being ordered and that you received approval to order it. Once the *Purchase Requisition Form* is completed and approved, it should be brought to Linda in the Business Office (if the item is over \$1,000 or was not budgeted for it should go to Mary first). If the vendor or company you are ordering from requires a *Purchase Order number*, Linda will give you that number on a form called a *Purchase Order Form*. Once the approved *Purchase Requisition Form* is brought to the Business Office, you would contact vendor and proceed with the purchase. The Business Office does not order the item. (Note that for summer supply orders for elementary teachers provide their requests to Luann who collects all of the purchase requests and submits to the business office and orders for you)

Buying something with your own money and planning on School reimbursing. To be reimbursed for a school expense that you paid for personally you use a *Check Request Form*. The *Check Request Form* is self-explanatory. **However**, you should always receive **preapproval before** you purchase an item to ensure you will be reimbursed. This approval should be documented via an email or on a check request form. Approval would be from your supervisor if under \$1,000 and within budget or from Mary or Wendy.in Business office if over.

- *College Class Reimbursement exception* – There is a specific form called *College Class Reimbursement* for requesting reimbursement for a college class you have taken (\$250 per class/\$500 a year). This form is used instead of a check request form and needs signed by your Principal and Mary or Wendy and then submitted to Business Office.

Buying something from Amazon.com The school has a single user Amazon.com Prime account so if you need to purchase something from Amazon, Linda in the Business office will order it for you once you have completed, had approved (same requirements as with other purchases) and submitted the *Amazon Purchase Form*. The form is submitted to Linda. Using the School's Amazon account ensures that we do not pay sales tax on the items and receive free shipping when applicable.

Buying something with a Credit Card To make a purchase with a credit card for online purchases or buying tickets for events etc., you will need to complete the *Credit Card Use Form*, have it approved and then go to your principal/supervisor to use their School Credit Card. Once you purchase the items with the Credit Card, attach supporting documentation/receipt to the form and return the card and the form to the person whose card you used so the card holder can submit the information to the Business office. Cardholders who are making purchases for their department are required to submit appropriate documentation (via the credit card app or in paper) but do not need approval for purchases if under \$1,000 and within their departments budget.

Buying a Professional Development Class Professional Development must be preapproved for it to be paid for. Submit information about the professional development (brochure/print out from internet etc.) with the *Professional Development Form* to your supervisor. Once approved, this form will be returned to you and you would follow the procedures above for credit card purchase or check reimbursement and attach the approved *Professional Development Form* as part of the supporting documentation. The Business office/principal will not sign you up for the professional development unless they have specifically told you they will. If the professional development class/training is something that in the previous year it was submitted as part of a Title II request with Holt...STOP...go see Sheri for next steps as Holt pays these directly.

All of these forms are available on the Business office Weebly website accessed from LCS website under Academics/Teacher Resources.

Note:

No one outside of the business office may sign a contract (service, lease etc) on behalf of the school.

LCS will not be responsible to pay vendors that documented preapproval was not completed first. The responsibility for payment will be with the individual placing the order and not LCS if approval was not received first.

