



# Operations Manual

<b>Governed By:</b> Fiscal	<b>Effective Date:</b> 04/01/2013
<b>Procedure:</b> Purchase Requests #2	<b>Updated Last:</b> July 2013
<b>Purpose:</b> To ensure timeliness and accuracy of purchase order requests within organization.	
<b>Refer to Policy #:</b>	

## Summary:

It is important to complete the attached form. Listed below is a description of the sections which need to be populated:

- “Program” refers to the program name, (example: HS, EHS, YouthBuild, WIC, etc).
- “Program Account” refers to your element number (example: 300110, 343030, etc).
- “Account Number” is your transaction account number (example: supplies 74500, local travel 78000, etc.).
- The “Purchase Order Number” will be completed by fiscal.
- “Make Check Payable to” refers to who the check needs to be written to. Please include an address.
- Complete your “Mail Check to” information if sending check back to the employee or different from who made check payable to.
- Complete the Quantity Ordered, Quantity Received, Description and Unit Price columns.
- The Total Amount will be calculated automatically.
- Purchase order instructions are very important. If a check is needed, backup, such as a registration form needs to be attached to the Purchase request. This is where you should put if just a PO is needed, if a check is needed and when it is needed by.
- Please be sure to allow adequate time for fiscal to process this request **especially for checks; usually 2 weeks.**
- Be sure to get the necessary signatures on the hard copy before submitting to fiscal, the program director and Debra Bedard (Vice President).
- **E-mail the purchase request to “purchase order”.** This is a very important step because it alerts fiscal of a purchase order request.

- ♦ When you receive your purchase order back, you can then make your purchase. If the actual purchase is higher than the amount of your PO you do not need to get a new PO as long as the excess is less than 10% of the amount you originally requested.



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<b>Purpose:</b>	

**Summary:**