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# **PURCHASE ORDER APPROVAL AND DISTRIBUTION (PUR-P003)**

DCSS – Purchasing Services

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## **1.0 SCOPE:**

- 1.1 To establish and maintain a method of approving and distributing Purchase Orders in the Dougherty County School System.

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## **2.0 RESPONSIBILITY:**

- 2.1 Assistant Purchasing Director

## **3.0 APPROVAL AUTHORITY:**

- 3.1 Assistant Purchasing Director

## **4.0 DEFINITIONS:**

- 4.1 PO – Purchase Order
- 4.2 DCSS – Dougherty County School System
- 4.3 GEMS – Government e-Management Solutions
- 4.4 MIS – Management of Information Services

## **5.0 PROCEDURE:**

- 5.1 The Purchasing Clerk logs onto the GEMS fiscal system.
- 5.2 The Purchasing Clerk goes to the “Requisition Approval” screen once each day at a designated time, usually 10:30 am and runs an EDIT version of the “APPREQ” (Approved Requisitions) report. This will be an edit of all newly submitted requisitions.
  - 5.2.1 The Assistant Purchasing Director determines if the requisitions have errors by looking for the following items:
    - 5.2.1.1 Has a “Stock” requisition accidentally been forwarded to Purchasing? If so, it is disapproved which sends the requisition back to the originator. The originator is notified to make the correction.
    - 5.2.1.2 Are there any items costing \$500.00 or more that have not been classified correctly? If so, the requisition is disapproved which sends the requisition back to the originator. The originator is notified to make the correction. Once the correction is made the originator will have to re-approve the requisition.
    - 5.2.1.3 Are there any items being purchased that should have invited bids, orally or formally?
      - 5.2.1.3.1 Purchases and Contracts from \$1000.00 to \$3000.00 may be invited orally from a minimum of two suppliers. A copy of the quote results shall remain at the school for audit purposes.
      - 5.2.1.3.2 Purchases and Contracts from \$3000.00 to 5000.00 shall be made on the basis of three written quotes, if obtainable.
      - 5.2.1.3.3 Purchases and Contracts in excess of \$5000.00 shall be invited by advertisement in at least one newspaper or general

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circulation, or mailing invitations to bid to all available dealers or a combination of such methods.

5.2.1.4 Are the requisitions classifying the purchases correctly? Example: Are supplies classified as “supplies”? Is equipment classified as equipment and so forth?

5.2.2 Once the Assistant Purchasing Director determines that the errors have been corrected or the requisition returned to the originator, the Purchasing Clerk runs the “APPREQ” report in the UPDATE mode on the GEMS financial program.

5.2.3 The Purchasing Clerk will then run the “POREPORT”, a GEMS report, which converts the requisitions to purchase orders.

5.2.4 Next, the Purchasing Clerk runs “WRITEPOS”, a GEMS report which will actually print the purchase orders. (MIS has to release this job from their terminal that will print the pos at our designated printer.)

5.2.5 Finally, the Purchasing Clerk runs “WRITEPOS”, a GEMS report, which will encumber the funds to the General Ledger.

5.3 The printed purchase orders are forwarded to the Director of Purchasing/Supply Services or Designee to review and sign.

5.4 The Purchasing Clerk files the original PO in numerical order.

5.5 The Purchasing Clerk emails the PO to the originator.

### **6.0 ASSOCIATED DOCUMENTS:**

6.1 Dougherty County Board of Education DJEA

6.2 Purchase Order

### **7.0 RECORD RETENTION TABLE:**

<b>Identification</b>	<b>Storage</b>	<b>Retention</b>	<b>Protection</b>	<b>Disposition</b>
Purchase Order	Warehouse, Hard Copy & Electronic	Minimum 5 Years	GEMS system	Discard as desired

### **8.0 REVISION HISTORY:**

<b>Date:</b>	<b>Rev.</b>	<b>Description of Revision:</b>
15-Dec-02	A	Initial Release
05-May-03	B	Added Purchasing Supervisor in 5.3. Change made in Section 5.2.1.3.1.
07-Jul-03	C	Changed Purchasing Supervisor to Designee in Section 5.3.
17-Sep-03	D	Section 5.5 added, 3.1 & 5.3 title corrected, 4.5 deleted
30-Sep-03	E	Delete Section 6.1 (State Accounting Regulations).

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31-Aug-06	F	Changed Purchasing Supervisor to Assistant Purchasing Director in Sections: 2.1, 5.2.1 and 5.2.2. Changes in Sections 5.2.1.3.1 and 5.2.1.3.2. Added Section 5.2.1.3.3.
16-Aug-07	G	Changes in sections 5.4 and 5.5
08-Jan-08	H	Deleted the wording "by phone" in sections 5.2.1.1 and 5.2.1.2.
17-May-09	I	Deleted Director of Purchasing/Supply Services in section 3.1.

**\*\*\* End of Procedure \*\*\***