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# STOCK ITEMS REQUISITION & VERIFICATION PROCESS (SUP-P103)

DCSS – Supply Services

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## 1.0 SCOPE:

- 1.1 This procedure outlines the process to follow when a Dougherty County School System employee needs to make a purchase from the central warehouse.

The online version of this document is official. All printed versions are uncontrolled copies.

## 2.0 RESPONSIBILITY:

- 2.1 Assistant Director of Purchasing

## 3.0 APPROVAL AUTHORITY:

- 3.1 Assistant Director of Purchasing

## 4.0 DEFINITIONS:

- 4.1 GEMS – Government e-Management Solutions
- 4.2 DCSS – Dougherty County School System
- 4.3 UNAPPREQ – Unapproved Requisitions
- 4.4 APPREQ – Approved Requisitions
- 4.5 PICKREPORT – Picking Ticket Report
- 4.6 PICKS – Stock Issues

## 5.0 PROCEDURE:

- 5.1 When the requisitioning process is completed at the school or department level, supply services personnel logs onto GEMS and goes to the requisition approval screen twice each day (or as needed) and runs a requisition report. This report lists all newly submitted requisitions.
- 5.2 Supply services personnel review the requisitions in edit mode for accuracy by checking for the correct account numbers, products per requisition, units of issue, and ensures that there are no backorders.
  - 5.2.1 If these items are not correct, the requisition is not approved which sends it back to the requestor on GEMS.
  - 5.2.2 Supply services personnel notify the requestor by telephone to make the corrections needed.
  - 5.2.3 Once the corrections have been completed, the requestor must re-approve the requisition and it is resubmitted.
- 5.3 Once all requisitions are correct supply services personnel runs the requisition report {APPREQ} in the update mode on GEMS system and this prints out the requisitions by location.
- 5.4 Supply services personnel then runs the PICKREPORT, which displays all items, requisitioned by the school or location.
- 5.5 Supply services personnel reviews the APPREQ with the PICKREPORT. Each requisition should have a matching PICKREPORT.

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- 5.6 If correct supply services personnel gives the Supply Inventory Clerk the PICKREPORT for filling orders for delivery. The supply services personnel files the Requisitions in a holding file by location and by delivery day until the order is delivered, signed by the receiver and deliverer, and the Pick Report is returned. Reference the Warehouse Stock and Shipping Procedure, SUP-P202.
- 5.7 Upon receipt of the Pick Report and/or Pick-Up Sheet, the Pick Report and/or Pick-Up Sheet is matched up with the Requisition. In the event there is any missing documentation, supply services personnel will contact personnel in the warehouse to resolve the issue.
- 5.8 Supply services personnel logs into the GEMS pick screen and enters the requisition number to perform the verification step of the stock requisition process. This will bring up an electronic view of each pick ticket. Supply services personnel will verify that the quantities match the Pick Report. If the quantity matches, supply services personnel checks the box as verification.
  - 5.8.1 In the event that the quantity was changed to “zero”, supply services personnel will enter the PUDEL screen to delete the line item. This will then print out a deletion page that is attached to the Requisition page, the Pick Report, and the Pick-Up Sheet, as available.
- 5.9 Supply services personnel runs the STOCKREQS report which charges the items to the account number(s) on the requisition.
- 5.10 The supply services personnel then files the Requisitions, Pick Reports, and any other documentation according to the quality records retention table below.
- 5.11 In the event that GEMS is down, the following steps are followed:
  - 5.11.1 The location requiring stock items completes a Pick-Up Sheet, form number SUP-F002 and brings it to the Supply Services Department.
  - 5.11.2 Supply services personnel will receive the Pick-Up Sheet and review it for accuracy, make a copy for the requestor and deliver a copy to the warehouse personnel.
  - 5.11.3 The item is pulled and the receiver, as well as the deliverer signs the Pick-Up Sheet, whether at the warehouse or the location.
  - 5.11.4 The Pick-Up Sheet is returned to supply services personnel who will, or has, entered the information into GEMS according to this procedure, prints out the Requisition and Pick Report and follows the requirements in this procedure for entry and verification.
  - 5.11.5 Upon completion, the documentation is identified as being verified and the Pick-Up Sheet is filed with all other documentation according to the quality records table.
  - 5.11.6 Note: supply services personnel will record the quantities on the Pick Report and signed as “see attached”.

### **6.0 ASSOCIATED DOCUMENTS:**

- 6.1 Warehouse Stock and Shipping Procedure, SUP-202
- 6.2 Requisitions (printed from GEMS)
- 6.3 Pick Reports (printed from GEMS)
- 6.4 Pick-Up Sheet, SUP-F002
- 6.5 Other attachments from GEMS, as needed, such as deletion reports.

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

<b>Identification</b>	<b>Storage</b>	<b>Retention</b>	<b>Protection</b>	<b>Disposition</b>
Pick Report, Requisition and other attachments as required, such as Pick-Up Sheet, and any deletion reports.	Department Files, by commodity, then location & date order	4 years, minimum	GEMS system	According to GA Law

### **8.0 REVISION HISTORY:**

<b>Date:</b>	<b>Rev.</b>	<b>Description of Revision:</b>
15-Dec-02	A	Initial Release
04-Nov-03	B	Stock Inventory Clerk changed to supply services personnel in section 4.3. SIC changed to supply services personnel in sections throughout the document.
15-Nov-06	A	This procedure is being changed from a purchasing process to supply services procedure; therefore, the numbering will change to SUP-P103, Rev. A. Deleted the original sections 4.3 and 4.4. The initials SSP and SRC were changed throughout the document to reflect the correct title, supply services personnel and Stock Inventory Clerk. Changes in section 5.11.4.
08-Jan-08	B	Added the word “no” in section 5.2.
23-Jun-09	C	Changed title in sections 2.1 and 3.1.

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