

Purchasing Training

October 17, 2016

Training Agenda

- Who we are/What we do
- Purchasing 101 – Quick Refresher
- Requisition Import Template – Exercise
- YMA vs YDA
- Donation Funds

Purchasing Rules

- Guidelines for purchasing are set forth by:
- Florida Statutes
- State Board of Education, Administrative Rules
- School Board Policies

We don't make the rules, but we make sure the District follows them.

Purchasing Thresholds

- Less than \$8,000:
 - (single or multiple items) No quotes required (competition is encouraged)
- \$8,000.01 to \$49,999:
 - (single or multiple items) Formal Written Quotes required (unless on existing contract).
- \$50,000.00:
 - (single or multiple items) Sealed Bid Process and Board Approval (unless under existing contract)

This is District wide and cumulative. (So, if 30 schools order \$2,000 worth of Piano repairs, we can't purchase without a competitive bid).

Requisitions – What is Important

- Include all contract numbers (and issuing agency) **USE DROP DOWN**
- Include Board approval dates
- Attach copies of quotes, competitor quotes
- Attach ANY pertinent information to the purchase
- Items must be listed (in detail)
- Ask Purchasing for assistance with large lists (>30 items)
- We may be able to import the list (from excel)

Requisitions missing the above information will be denied

Requisition Import Template

- Log into Training. <http://myportal.stlucie.k12.fl.us/>
 - Click Employee Access Training (bottom of the page).
 - Your screen should say SLC Business Training
- Browse to Secretary/Bookkeeper Page for sample file.
- Download the file and download Requisition Import Template
- Follow Instructions on first tab of the Import template.

If you have completed the import successfully, please assist your co-workers.

YMA vs YDA

- What is it?
 - How the accounting is broken out on the requisition.

Requisition Setup Information

Requisition Group:	020 - Palm Point K-8	▼
Fiscal Year:	2015 - 2016 July 1, 2015 - June 30, 2016	▼

☒ Account allocation by total requisition amount (YMA).
☐ Account allocation by each requisition detail line (YDA).



- YMA – used to split a requisition by percentage, doesn't care what line item is paid....still splits payment by percentage
- YDA – used to tag a cost strip to a specific line item. Useful when using multiple cost strips, especially fixed assets (6410, 6430, etc).

Is It YMA or YDA ???

- Principal Betty wants to purchase 2 laptops and 2 monitors for her new teachers.
- What object(s) would you use?
- Do you use YMA or YDA on the requisition?

Is It YMA or YDA ???

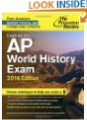
- ABC Consulting provides services to multiple schools. The grant requires you to track payment for each site.
- Is this a YMA or YDA?
- Why?

Is It YMA or YDA ???

- Principal Betty needs to purchase some supplies for the school. Some of the supplies are eligible for Title I, others are not.
- Can you enter one Purchase order for this purchase?
- YMA or YDA?

Misc Housekeeping Items

- Amazon orders – please try to refrain from using third party fulfillment services on Amazon. Is It YMA



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Misc Housekeeping Items

Charter Bus Vendors

- Must use the approved list of vendors here:
<https://www.stlucie.k12.fl.us/pdf/departments/finance/book/Charter-Bus-Vendor-List.pdf>
- Make sure they pricing matches up to the quote. All vendor provided pricing. Often the quote only shows a total, but that does not allow you to check the pricing.
- Make the vendor submit their quote with detailed pricing breakdown.
- May be surprised to find they are over charging you!

Misc Housekeeping Items

- Enterprise – IF your employees use the rental car Sunpass program, they may receive an invoice. Please submit those invoices to AP for payment (under your Enterprise PO).