

# Purchasing and Payment Methods

	Direct Voucher	P-Card	Purchase Order	Contract
<b>SERVICES</b>	<p><b>The following types of purchases may be paid by direct voucher (via Accounts Payable) if the vendor <u>will not</u> accept a P-Card:</b></p> <ul style="list-style-type: none"> <li>Dues</li> <li>Fees</li> <li>Postage</li> <li>Event Sponsorships</li> <li>Tickets and Admission for plays, museums, performances, etc.</li> <li>Registration for trainings or classes</li> <li>Hotels, catering, and space rental where the hotel or catering vendor does not require a contract and does not take a P-card</li> </ul>	<p><b>P-Card use is encouraged for the following types of purchases*:</b></p> <ul style="list-style-type: none"> <li>Dues, fees, event sponsorships</li> <li>Shipping and postage</li> <li>Tickets and admissions (e.g., zoo, museums, theater)</li> <li>Hotels, catering, or space rentals may be paid on P-Card:                             <ul style="list-style-type: none"> <li>• When the vendor does not require a contract, or</li> <li>• After a contract is signed by Purchasing &amp; Contracting</li> </ul> </li> <li>Very simple, one-time services:                             <ul style="list-style-type: none"> <li>• Laundry</li> <li>• Uniform Embroidery</li> <li>• Printing</li> <li>• Chair rental</li> </ul> </li> <li>Payment on contracts for routine, ongoing or as-needed services <u>with pre-approval</u> from Purchasing &amp; Contracting</li> <li>Travel and Training <u>with pre-approval</u> via Pre-Travel/Training Authorization Form submitted to AP</li> <li>(Music/theater/production licenses will be paid by P-Card by AP after contract is signed by Purchasing &amp; Contracting)</li> <li>*Infrequently, vendors will charge a credit card fee for P-card use. If vendors charge a fee, please use a direct voucher or PO instead.</li> </ul>	<p><b>The following types of purchases may be made by PeopleSoft PO unless the vendor requires its own contract form:</b></p> <ul style="list-style-type: none"> <li>Facilities and Asset Management and Office of School Modernization only: Small construction projects &lt; \$10,000</li> <li>Simple, routine, ongoing, or as-needed services <u>with pre-approval</u> from Purchasing &amp; Contracting</li> <li>Simple digital resources (e.g., online apps and subscriptions)</li> <li>Items that could be purchased via P-Card (column to the left) but <u>vendor does not accept P-Card</u></li> <li>Small furniture rentals &lt;\$10,000</li> </ul>	<p><b>A contract – preferably on the District’s own contract form – is required for the following services:</b></p> <ul style="list-style-type: none"> <li>Personal services, including:                             <ul style="list-style-type: none"> <li>• Medical, legal, financial, educational, special programming</li> <li>• Other unique or specialized services</li> <li>• Services that involve contractor interaction with students</li> </ul> </li> <li>Hotels, catering, and space rental (unless the hotel or catering vendor does not require a contract)</li> <li>All other services that are not on the Direct Voucher, P-Card, or Purchase Order lists (columns to the left)</li> </ul>

# Purchasing and Payment Methods

	Direct Voucher	P-Card	Purchase Order	Contract
GOODS	<p>A direct voucher may be used as a means to pay for one-time goods purchases if the vendor will not accept a PO or P-card</p>	<p>A P-Card may be used for the following types of purchases*:</p> <p>All goods purchased via Private Marketplace</p> <p>Basic, readily available goods purchased in person, online, or over the phone, e.g.,</p> <ul style="list-style-type: none"> <li>• Office and classroom supplies</li> <li>• Maintenance supplies</li> <li>• Books</li> </ul> <p>Payment on price agreement/material requirements contracts <u>with pre-approval</u> from Purchasing &amp; Contracting</p> <p>(Student body funds may be used for any of the above P-Card purchases that qualify as SBF expenses, but prior approval of the principal is required for purchases greater than \$500.)</p> <p>*Infrequently, vendors will charge a credit card fee for P-card use. If vendors charge a fee, please use a direct voucher or PO instead.</p>	<p>A PO should be used to purchase the following types of goods:</p> <p>Goods that require detailed ordering info such as part numbers, sizes or colors, delivery dates, customization, unit pricing</p> <p>Mass-marketed software (e.g., Adobe, Word)</p> <p>Computer hardware and peripherals not purchased through Private Marketplace</p> <p>Goods purchased pursuant to a price agreement/material requirements contract that requires a PO for each order</p> <p>A <b>Blanket PO</b> may be used when you anticipate purchasing a variety of readily available items from a specific vendor over the course of the year, on an as-needed basis, and total spend is estimated</p> <p>(Student body funds may be used for any of the above PO purchases that qualify as SBF expenses, but prior approval of the principal is required for purchases greater than \$500.)</p>	<p>A contract can establish an ongoing price agreement against which goods can be ordered on an ongoing basis.</p> <p>Price agreements are typically centrally procured and managed and are used for:</p> <ul style="list-style-type: none"> <li>• Food products</li> <li>• Maintenance parts</li> <li>• Library books</li> </ul>

**Student Body Funds purchases only:** When a principal pre-authorizes (on the SBF Purchase Approval Form) purchases over a period of time from a particular vendor and up to a particular dollar amount, the vendor may invoice directly after each purchase. Invoices may be paid at the school by P-Card or Student Body Funds check.