

# Purchasing and Payment Methods

## Goods & Materials

PCard	Purchase Order	Contract	Direct Voucher
<p><b>A PCard may be used for the following types of purchases:</b></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>Contracts with PCard payment language or contracts with pre-approval from Purchasing &amp; Contracting</p> <p>See Full List of acceptable PCard purchases in the PCard Manual: <a href="https://www.pps.net/Page/1344">https://www.pps.net/Page/1344</a></p> <p>Goods purchased via PCard do not have terms and conditions or protections if there are faulty materials or items do not meet specifications. Only supplier warranties and BofA disputes apply.</p>	<p><b>A PO should be used to purchase the following types of goods:</b></p> <p>Goods requiring detailed ordering information such as part numbers, sizes or colors, delivery dates, customization</p> <p>Goods purchased pursuant to a price agreement, material requirements, or cooperative contract that requires a PO for ordering</p> <p>Goods that require installation or other service component as part of the purchase</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>PO request forms: <a href="https://www.pps.net/Page/1888">https://www.pps.net/Page/1888</a></p> <p>Goods purchased via PO include District terms and conditions preventing payment if faulty material are delivered or do not meet specifications.</p>	<p><b>A contract can establish an ongoing price agreement against which goods can be ordered on an ongoing basis.</b></p> <p>Price agreements are typically centrally procured and managed and are used for e.g.:</p> <ul style="list-style-type: none"> <li>• Food products</li> <li>• Maintenance parts</li> <li>• Library books</li> </ul>	<p><b>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 PCard.</b></p> <p>Link: <a href="#">Direct Voucher Form</a></p>

\*Technology items with OTIS defined standards must follow the IT Purchasing process: <https://www.pps.net/it-purchasing>

\*Any digital resource with student personally identifiable information must be reviewed and approved by IT Learning Technologies who will direct the method of purchase. See request form and list of reviewed/approved digital resources here: <https://www.pps.net/Page/14073>.

## Services

PCard	Purchase Order	Contract	Direct Voucher
<p><b>PCard use is encouraged for the following types of purchases:</b></p> <p>Hotels, catering, space rentals, or furniture rental may be paid on PCard:</p> <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> <p>Very simple, one-time services:</p> <ul style="list-style-type: none"> <li>• Laundry</li> <li>• Uniform Embroidery</li> <li>• Printing</li> <li>• Simple maintenance with Purchasing &amp; Contracting pre-approval</li> </ul> <p>Payment on contracts for routine, ongoing or as-needed services <u>with pre-approval</u> from Purchasing &amp; Contracting</p> <p>Travel and Training <u>with pre-approval</u> via Pre-Travel/Training Authorization Form</p>	<p><b>The following types of purchases may be made by PeopleSoft PO unless the vendor requires its own contract form:</b></p> <p>Simple, routine, ongoing, or as-needed services <u>with pre-approval</u> from Purchasing &amp; Contracting</p> <p>Facilities and Asset Management and Office of School Modernization only: Small construction projects that are &lt;\$10,000</p> <p>Items that could be purchased via PCard (column to the left) but <u>vendor does not accept PCard</u></p> <p>PO request forms: <a href="https://www.pps.net/Page/1888">https://www.pps.net/Page/1888</a></p>	<p><b>A contract – preferably on the District’s own contract form – is required for the following services:</b></p> <p>Personal services, including:</p> <ul style="list-style-type: none"> <li>• Services that involve contractor interaction with students</li> <li>• Medical, legal, financial, educational, special programming</li> <li>• Other unique or specialized services</li> </ul> <p>Hotels, catering, and space rental (unless the hotel or catering vendor, or space rental venue does not require a contract. In which case you can simply pay with your PCard)</p> <p>All other services that are not on the PCard or Purchase Order lists</p>	<p><b>A direct voucher may be used as a means to pay for services if the vendor will not accept a Contract, PO or PCard.</b></p> <p>Link: <a href="#">Direct Voucher Form</a></p>