

## CTE Purchasing Guidelines

The following guidelines apply to the management of all public funds and must be followed each time a purchase is made to insure compliance with Board policies and audit requirements. All Board policies must be followed.

Purchases should be coordinated with the CTE secretary or the CTE administrator/assistant principal at your school. Your CTE principal will need to approve your purchase.

### Orders \$1.00 up to \$499.00

- Purchases up to \$499 may be without a purchase order.  
If the vendor requires a “printed copy” of the purchase order, submit a Sumner County Board of Education requisition with the words “Printed Copy Required” at the bottom of the page by the principal’s signature.
- If the company will accept a “verbal” purchase order number, please use your school location code followed by the two-digit month, the two-digit day, your initials, and the abbreviation “CTE” indicating that this is a CTE purchase. For example: 070 07 08 LW CTE

### Orders \$500.00 to \$9,999.00

- Orders totaling \$500 or more require a purchase order number before you can place the order.
- Need a requisition (NCR paper).
- Three bids are required.
  - If any item or multiples of that same item being ordered is \$500 or more, three telephone/ internet bids are required, and the completed bid sheet will need to accompany the requisition. If the item being ordered is from a sole source, a sole source letter from the company must accompany the requisition.

### Orders of \$10,000 or more

- Purchases of \$10,000 or more will require advertisement in the newspaper and formal sealed bids. Board approval will also be required.

**Gift Cards** No gift cards allowed.

**Shipping/Handling** Include shipping/handling costs on requisition.

**Blue/Black Ink** All purchase/financial records require blue/black ink (due to scanning).

### Copy Paper Purchases

Teachers will order paper through their school CTE Secretary who will request it from the central office. Purchases are deducted from teacher allocations.

Orders will arrive at your school with a pink charge ticket. **A copy of this signed pink charge ticket with amount due will be sent to the District CTE Bookkeeper.** NOTE: No purchase order will be needed, since the paper has already been purchased and this transaction represents only a journal entry being made on our part.

**Prepaid Orders** We do not pre-pay orders.

**Splitting orders** Splitting or dividing items to be purchased in order to avoid bidding procedures or other purchasing procedures is a violation of Board policy. It is also a violation for two teachers who are in the same department to purchase the same items, at the same time, if the total of the purchases exceeds \$500.

**Past Due Invoices** Invoices should be paid within two week's the order is complete.\*\*  
Contact the company immediately to resolve any problems or discrepancies with your order. Past-due invoices cause time consuming research each month; therefore, your principal will be notified of any invoice that is three months old. \*\* If item(s) are backordered see Backorder section below.

**Closing Purchase Orders** All purchase orders must be closed by the date announced each year (typically early spring).

**After Receipt of Requisition** Order will be processed and a purchase order will be issued. This may take up to (2) two weeks to process. A white copy of the P.O will be sent to the school CTE secretary who will place the order unless otherwise noted. If the school must call in an order to expedite shipment, the purchase order number must be included and recorded on the invoice.

**When the Order is Received**

Use the packing slip to check off each item as it is received. Sign and date each packing slip and place them with your purchase order or disbursement request.

When the invoice is received from the company, be sure the amounts on the invoice are correct. If the item purchased has been bid, the amount invoiced must be the bid price and match the P.O. (if p.o. is applicable). If you discover a discrepancy, contact the vendor and request that an adjustment be made.

**Tax Exempt** As a school system and government agency, we are exempt from Tennessee, Kentucky and Florida sales tax. Tax exemption certificates are on file in the District Office, as well as your CTE Secretary's office. Do not approve payment of an invoice that includes sales tax. Contact the company and ask for a credit for any sales tax charged.

**Backorders** If you are notified that an item is backordered, check on estimated delivery. If back ordered for more than two weeks call the CTE District Office 451-5223.

**Payment** Please do not submit your purchase orders or disbursement requests for payment until you have received all invoices and applicable credits for merchandise received, returned, and re-shipped. Do not assume that a credit will automatically cancel out one of the invoices. Submit all invoices, packing slips, and credits with your request for payment. Please keep proof of shipment on all returned merchandise.

Sign and date the itemized invoice(s). Each invoice submitted for payment must contain your signature verifying that your entire order has been received, that there are no backorders pending, and that all the individual prices, extended prices, total payment due charged on the invoice(s) are correct. Indicate "order complete", "ready for payment" on invoice.

Any request for payment without proper documentation will be returned to you.