DIA Procurement Procedure:

Step 1: Become aware of a need for a **good** or **service**

Step 2: Do initial research and pricing for the **good** or **service**

- ✓ Print off the desired order
- ✓ Attach the print off to a **requisition form**
- ✓ Fill out the requisition form
- ✓ Submit the form to the Principal for **approval**

Approval Process:

- ***All***: need principals approval (This may be verbal for small purchases and then signed later)
- ***Over $5,000***: Board member signature on requisition form
- ***Over $10,000***: Approved in a board meeting

Procurement Compliance:
If: one Single item or services cost $1,000 or more
Or: an Order of items or services cost $5,000 or more
Then need to do one of the following:

- Obtain at least one other bid that you don't use, attach to requisition form
- Or find the item(s)/service(s) on state contract: www.purchasing.utah.gov
- Or the item is from a sole source vendor

Examples of sole source:
If you teach a particular curriculum that only that company offers
You already have all apple computers and you only want more apple computers

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Step 3: After approval, the requisition and order information is returned to the ordering employee to place the order

Step 4: Place order, payment options:

- ***Preferred*** option: Vendor bills the school directly, emails or mails invoice to the school
- ***Second*** option: A check is requested and sent with the order
- ***Third*** option: the school debit card is used to pay for the order
- ***Fourth*** option: the employee pays for the order and then is reimbursed

Please mark which of these options is used on the requisition form (top right box)

Step 5: The requisition in all of the 4 situations of above is given to the business manager

- The business manager then:
  - ✓ Waits for the invoice
  - ✓ Or cuts the check and send in the order with the check
  - ✓ Or records the debit charge in the accounting system
  - ✓ Or cuts a reimbursement check to the employee who paid for the good

Step 6: All paperwork is filed by vendor name and kept in good order by the business manager

- Recorded with each purchase is: expense code, function, program, descriptive memo, internal tracking (if applicable)