

HVPS Purchasing Process

1. Identify a need. Request a quote (and W-9 from vendor if vendor is new).

2. Submit quote, W-9 and a *statement of justification* to secretary.

3. If new vendor, secretary submits W-9 via email to Jessica Batrez in Business Office to create vendor in iVisions.

6. Secretary (originator) submits Purchase Requisition (PR) in iVisions. *Justification must be included in internal notes. All Quote #s and CES Contract #s must be included in PO Notes.*

5. Jessica informs secretary when vendor is available in iVisions.

4. Secretary confirms Tax Exempt Status. Work with Jessica to complete this.

7. Supervisor approves PR or returns PR to originator if unallowable, or for clarification/revision.

8. Shelly Ortega verifies account code and allowability, then approves PR or returns PR to originator if unallowable, or for clarification/ revision.

9. Sheila Offutt or Michael Chavez approves PR or returns PR to originator if unallowable, or for clarification/revision.

12. Secretary receives and verifies order and submits pay confirmation, packing slips and all invoices to Raney Weiler for payment. **(If order is complete, mark Close PO. If not, indicate cancellation or Back Order date)**

11. Secretary submits a copy of the quote and Vendor PO to Vendor to place the order or informs employee that they may register for PD/etc.

10. Raney Weiler creates Purchase Order (PO) and sends PO - Vendor Copy to originator.

13. Secretary delivers items to requesting employee.

14. PO Process is COMPLETE!

15. Monthly - check that your POs have been ordered, received, paid and closed.
**Revise Open POs if needed.*