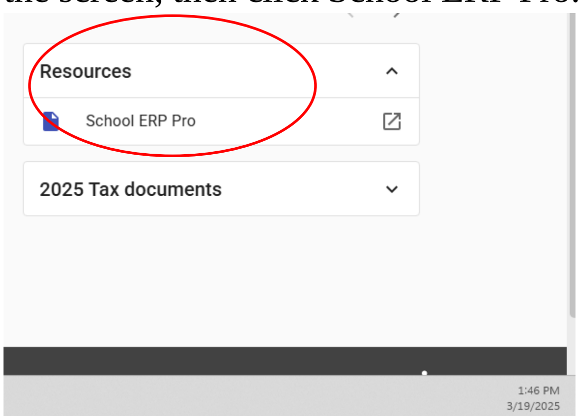
HVPS Purchasing Process

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.
4. Secretary confirms Tax Exempt Status. Work with Jessica to complete this.
5. Jessica informs secretary when vendor is available 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.*
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.
10. Raney Weiler creates Purchase Order (PO) and sends PO - Vendor Copy to originator.
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.
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)**
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.*

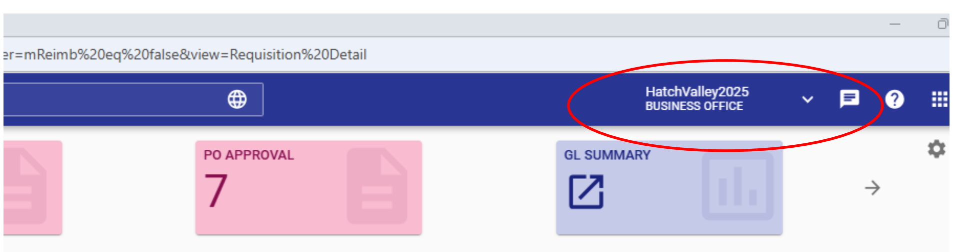
How to Enter a Purchase Requisition

ALL POs should be created prior to placing orders, and prior to receiving invoices. Do not attach an invoice to a PR. Invoices should be sent to Raney Weiler for payment processing.

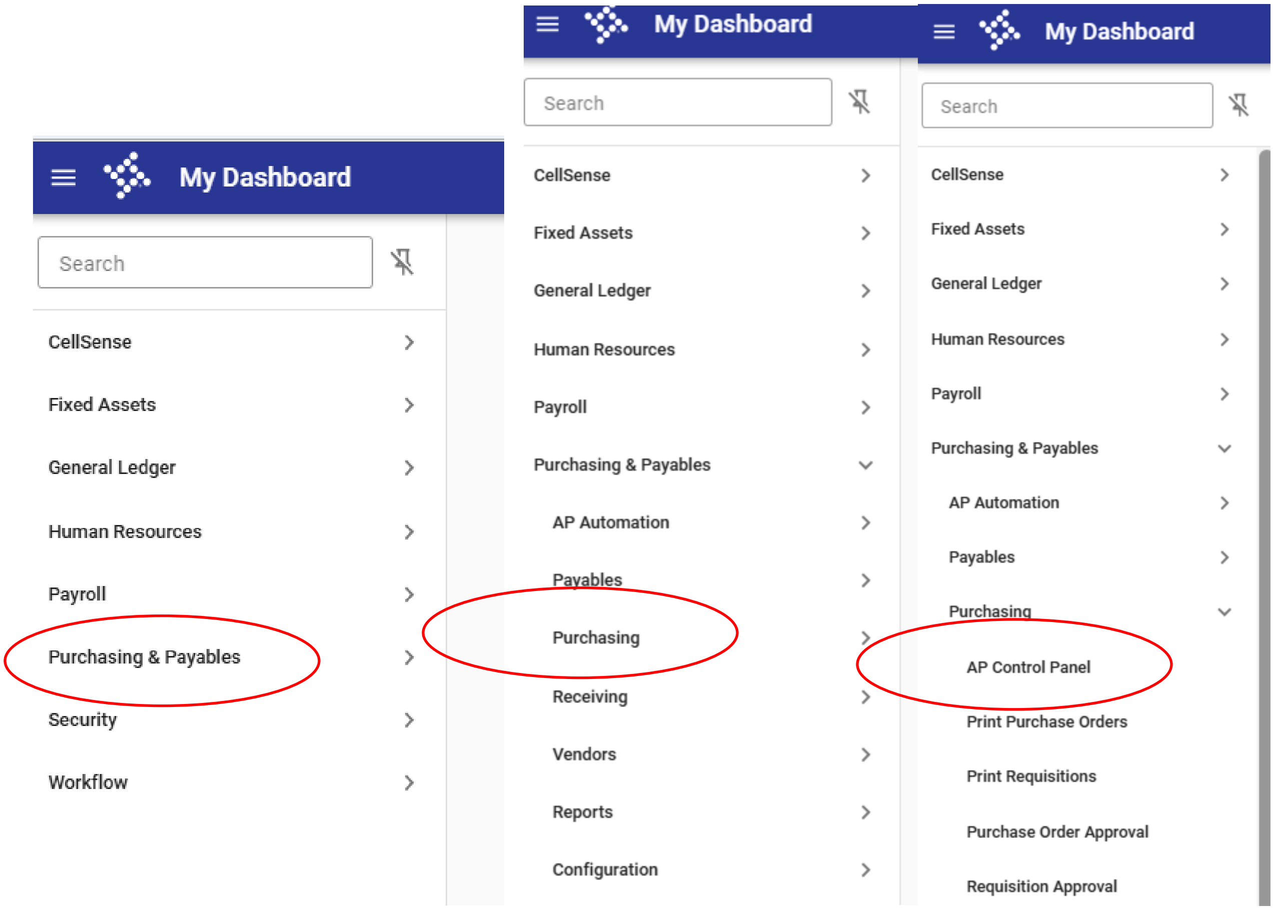
1. Navigate to https://www.hatchschools.net/
2. Click Staff Resources https://www.hatchschools.net/staffresources
3. Click Employee Self-Service (iVisions) https://hatchvalleypsnm.tylerportico.com/tesp/employee-selfservice/
4. Enter your School Email address in the username box.
5. If you have not logged in here, you will need to enter your home zip code and last 4 of your SSN. (You should not be required to enter a password. If you are, please clear your cookies and try again.)
6. Click Next.
7. Choose your Gmail account.
8. When Employee Access opens, click Resources on the lower right portion of the screen, then click School ERP Pro.



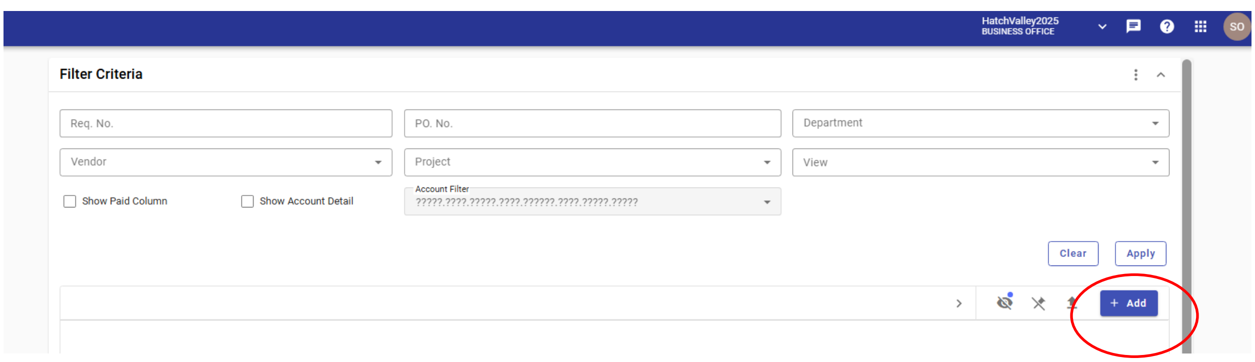
9. Confirm that the year at the top right is the current year (the year of the spring semester of any given year, i.e., 2025-2026 school year is Fiscal Year 2026, so you should be on HatchValley2026.)



10. On the left menu, click Purchasing & Payables, then Purchasing, then AP Control Panel



11. Click Add on the center right of the screen.



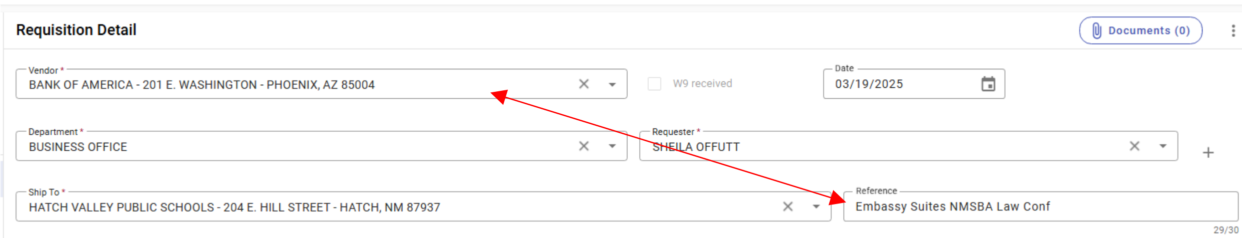
12. Start keying in the Vendor. If the Vendor name does not appear, please contact Jessica Batrez as she will need to enter the Vendor in iVisions. She will give you a new Vendor form, and you will need to request a W-9 from the vendor then will submit the W-9 and form to Jessica Batrez. She will contact you when you are able to enter the PR.

13. Select Department if prompted to do so.

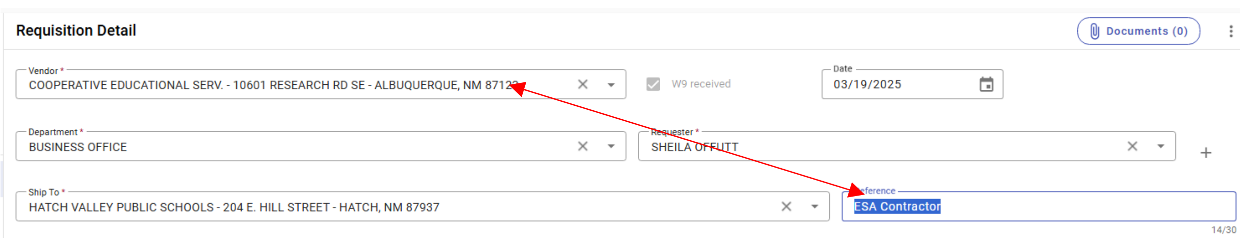
14. Select Requester from drop-down menu.

15.Enter the Reference:

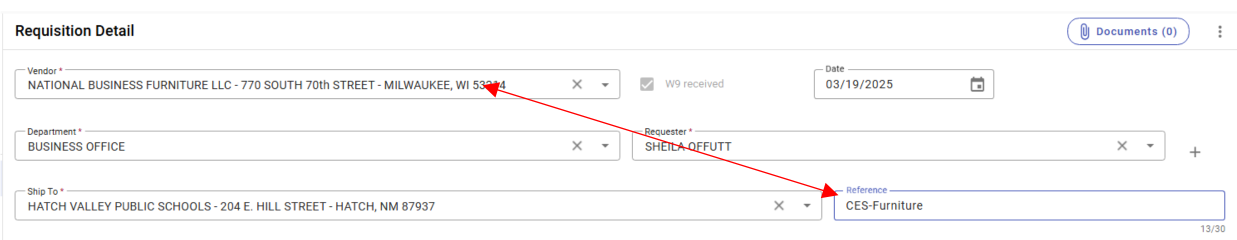
a. For all BOA PRs, the Reference should be the name of the hotel/store, etc. for which the BOA card will be used.



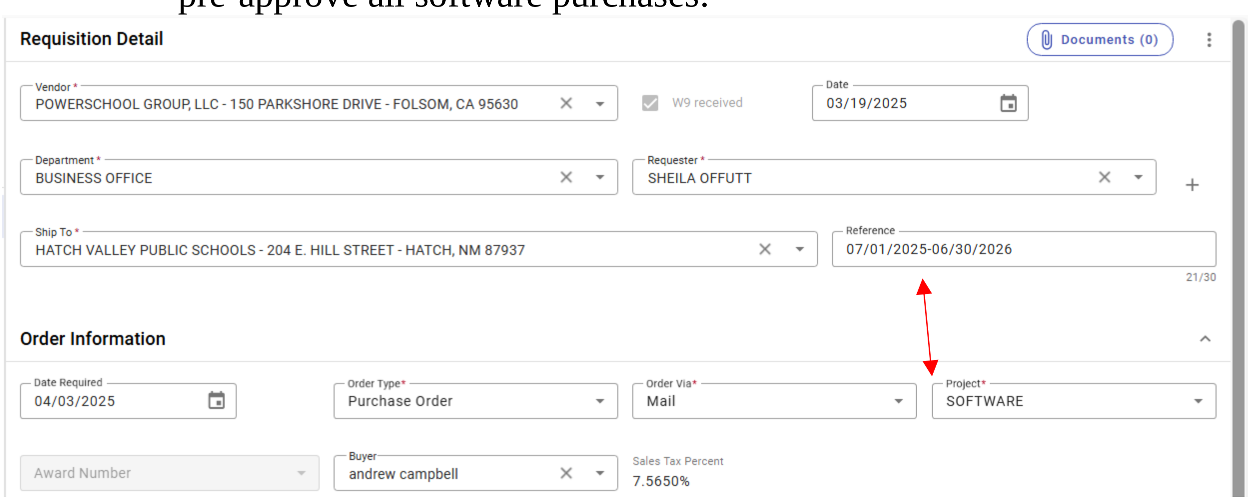
b. For all CES POs, the Reference should be the name of the contractor.



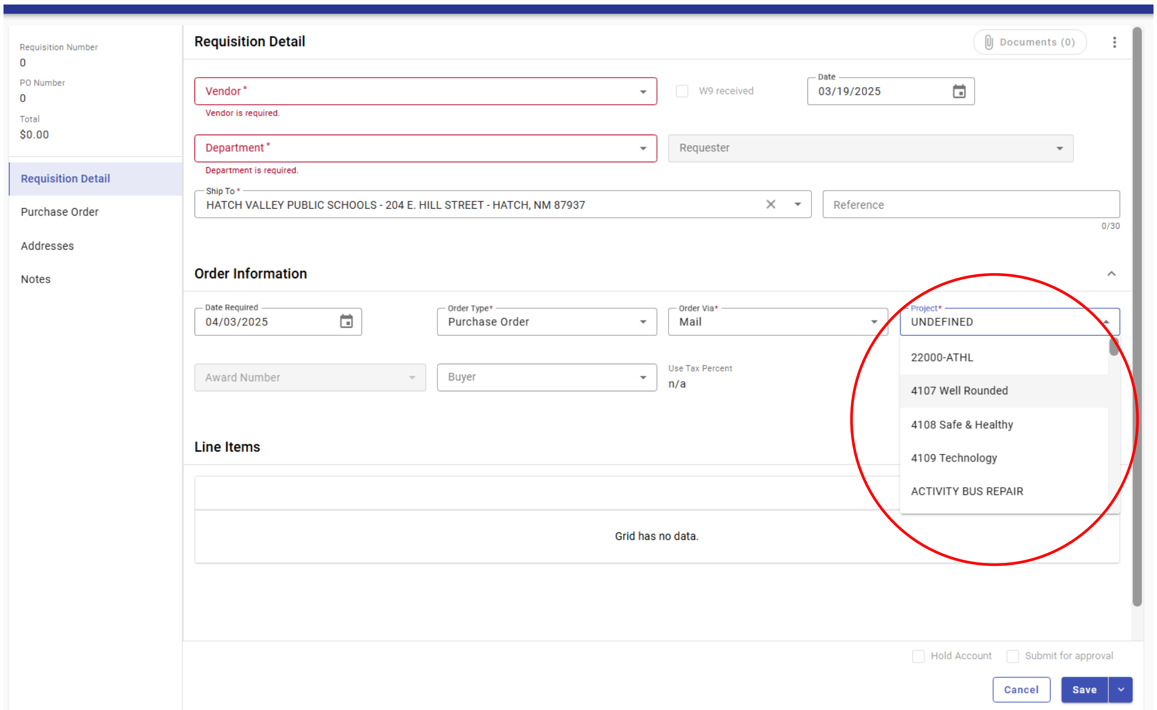
c. For all CES Direct Purchase POs, the Reference should be: CES and include a description of the PO.



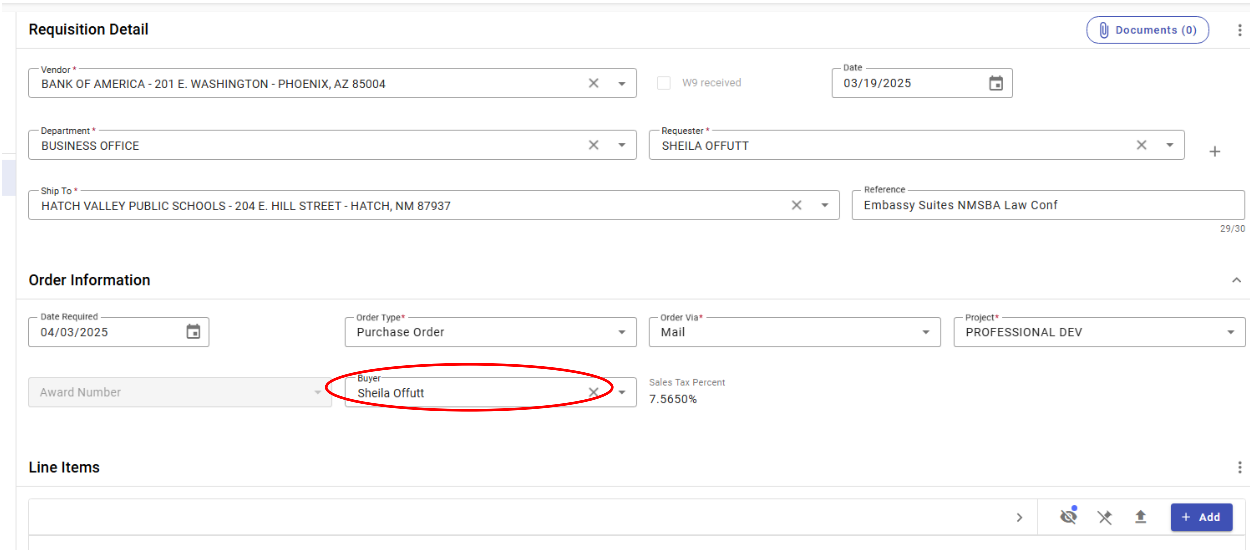
d. For all Software POs, Enter the dates of service for the software in the following format: **07/01/2025-06/30/2026**. Andrew Campbell should pre-approve all software purchases.



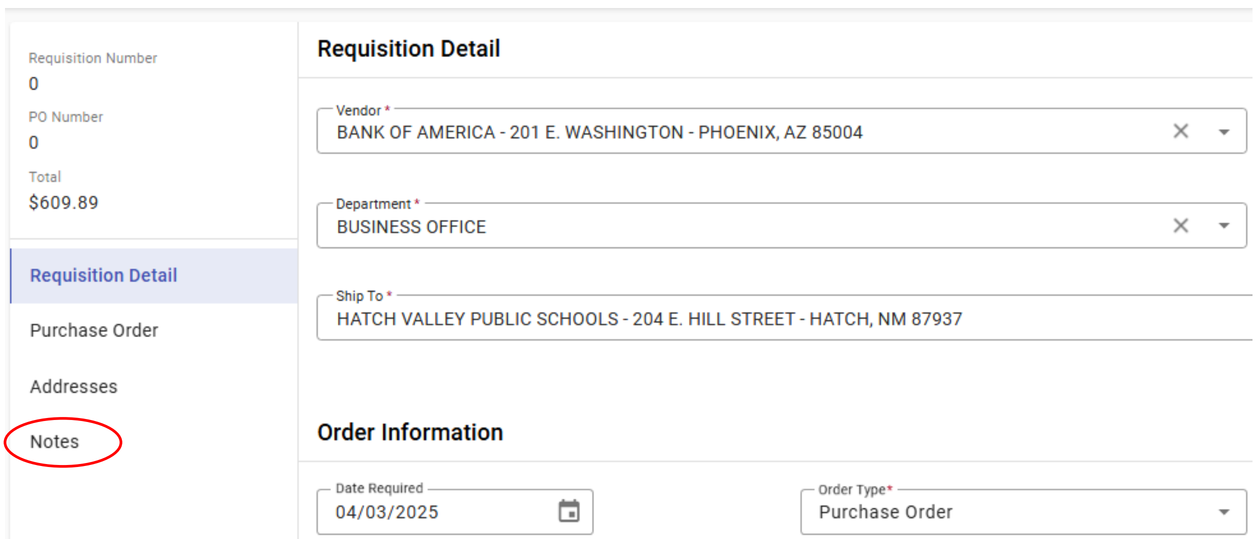
16. Enter the Project
    a. All CTE POs must include a CTE Program of Study (HVHS & HVMS)
    b. All FII POs must include an FII Program (RGE)
    c. All 24189 POs must include a 410? Program (see below)



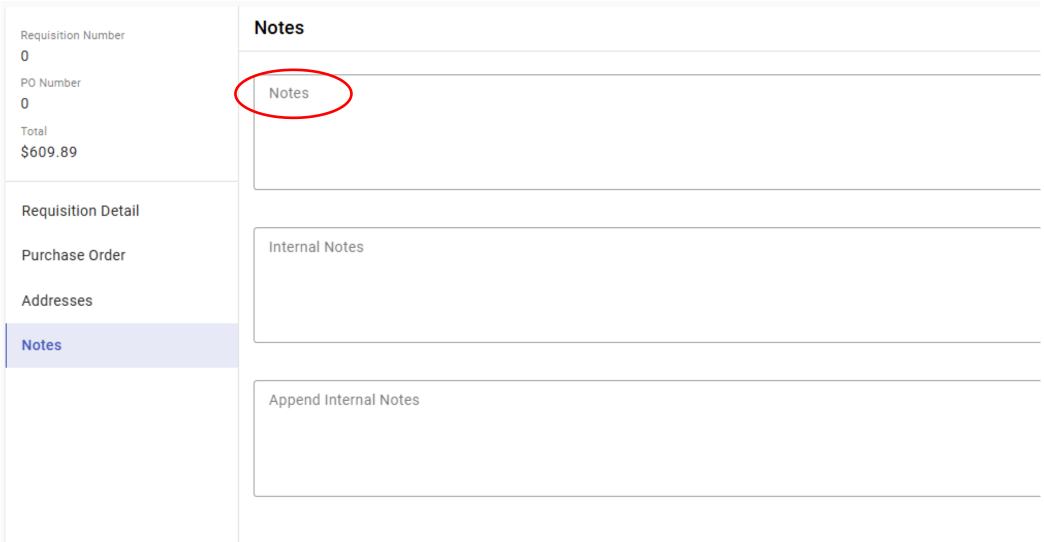
17. Select the Buyer from the Drop-Down Menu



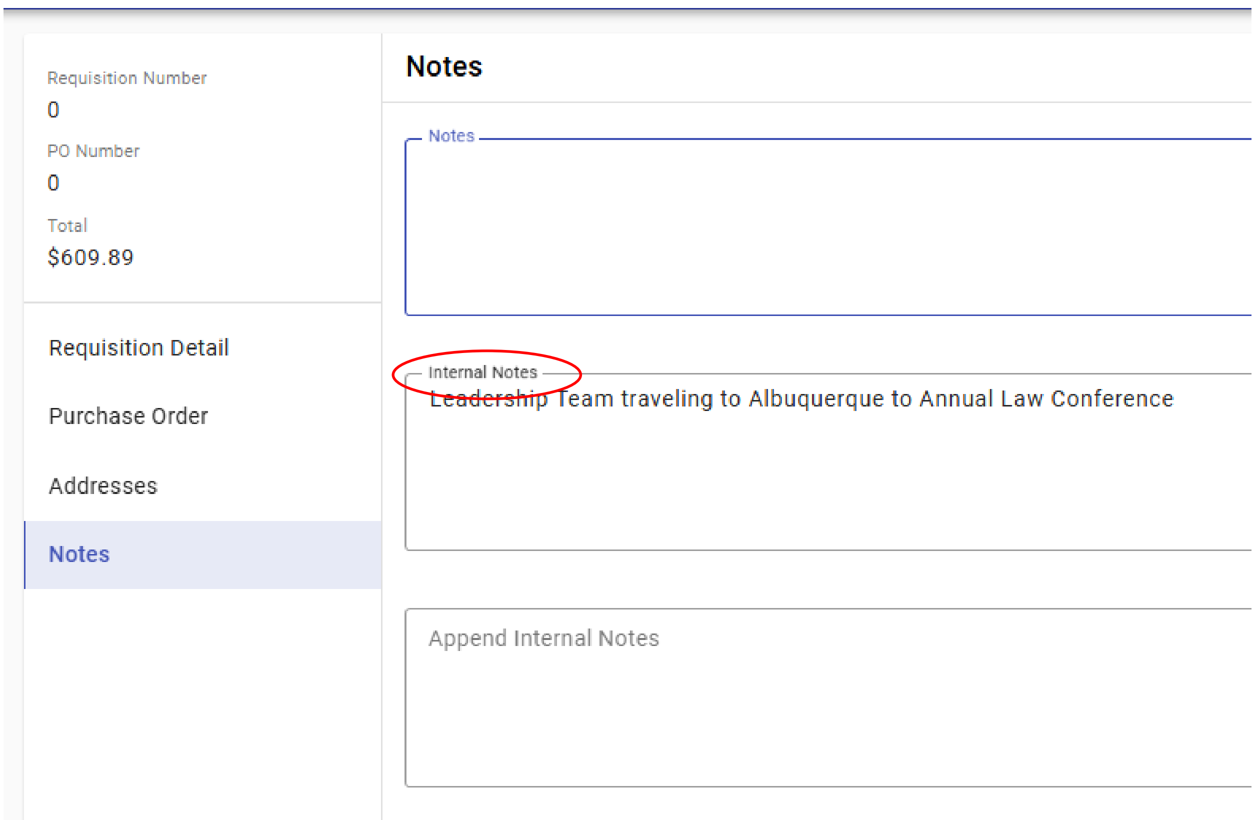
18. Enter PO Notes and Internal Notes. On the Left side of the screen, Click Notes:



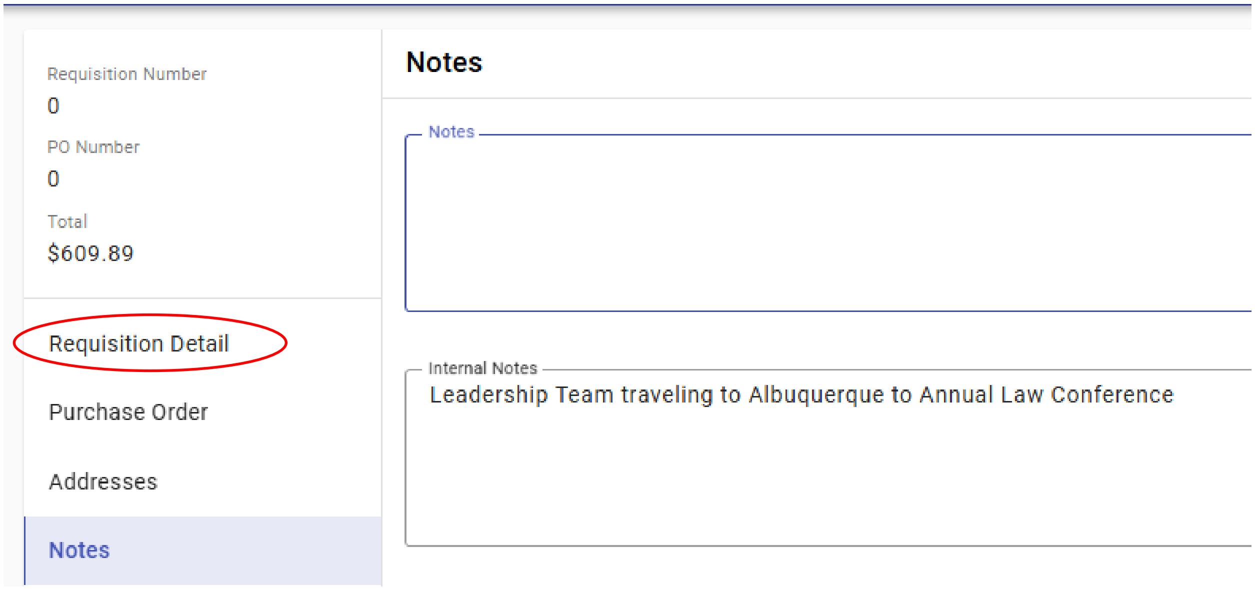
19. Enter Quote number and Contract numbers in Notes. ALL CES contract numbers should be entered in Notes box. All construction POs or POs over $60,000 should have a State or Cooperative Purchasing Contract (Region 9, TIPS, etc.) number in the Notes section.



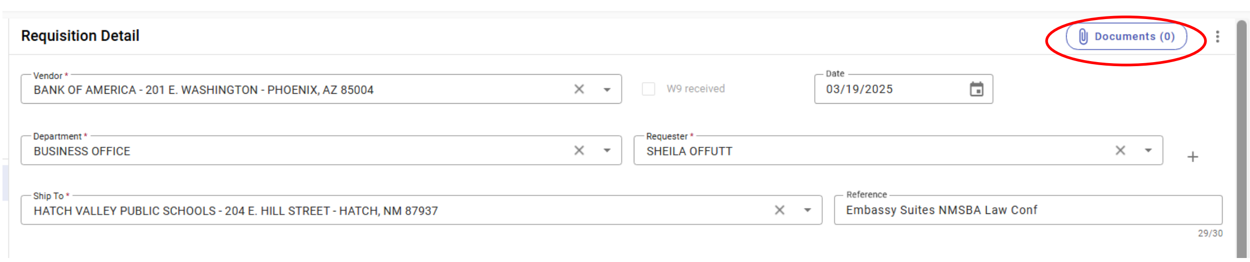
20. Click on Internal Notes and enter the Justification for the Purchase.



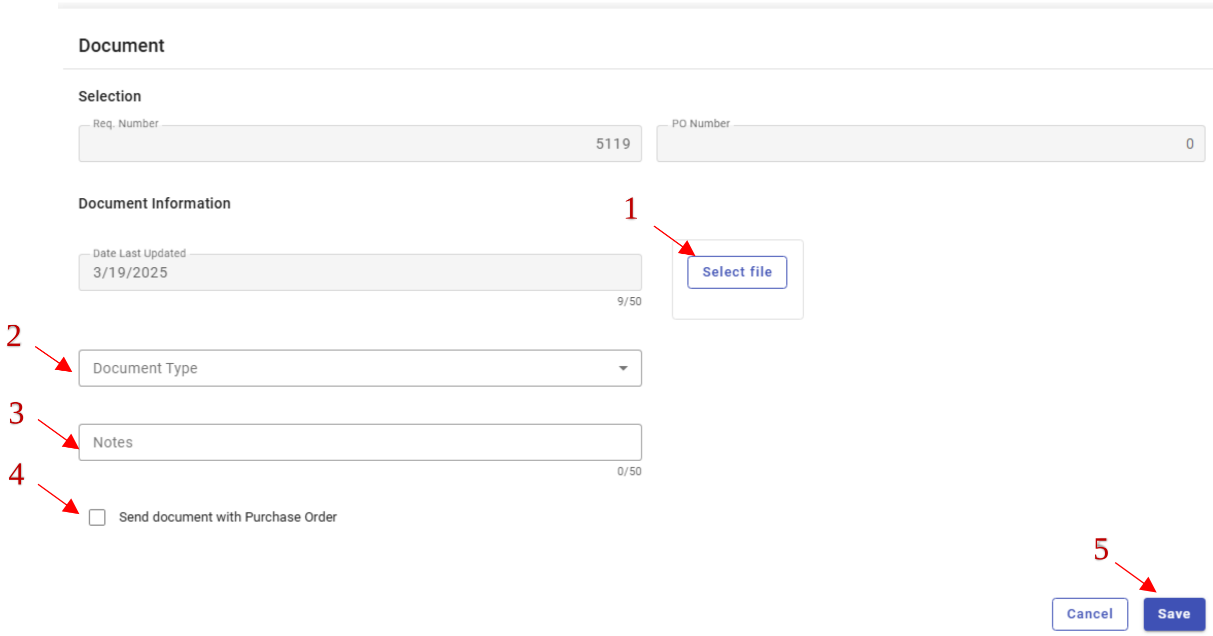
21. Click Requisition Detail to Return to the Req. to proceed.



22. Click Documents on the top Right corner to upload Quote/Agenda/Travel Estimate/Hotel Reservation Information, etc.

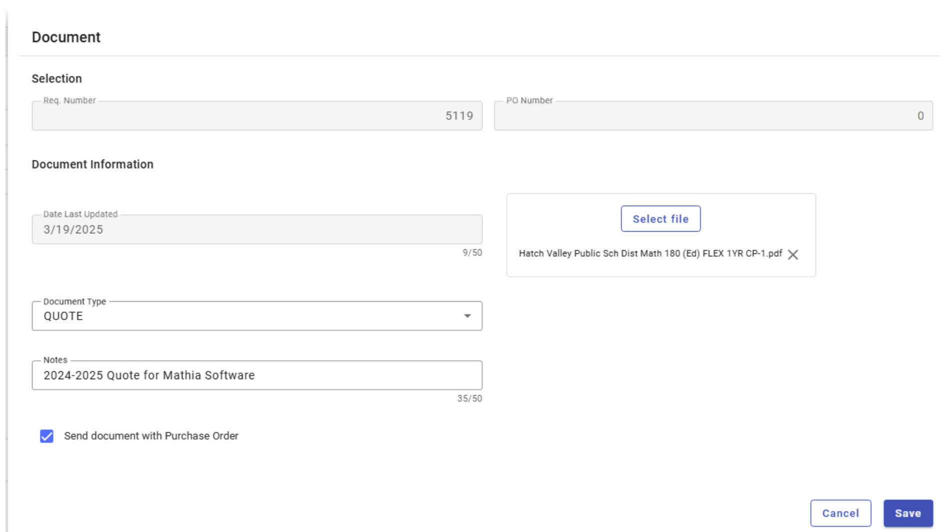


23. Click Add, then Select File. Choose your file from your computer. Then select the Document Type from the drop-down menu, enter Notes if applicable, then Check the box “Send document with Purchase” then Save.



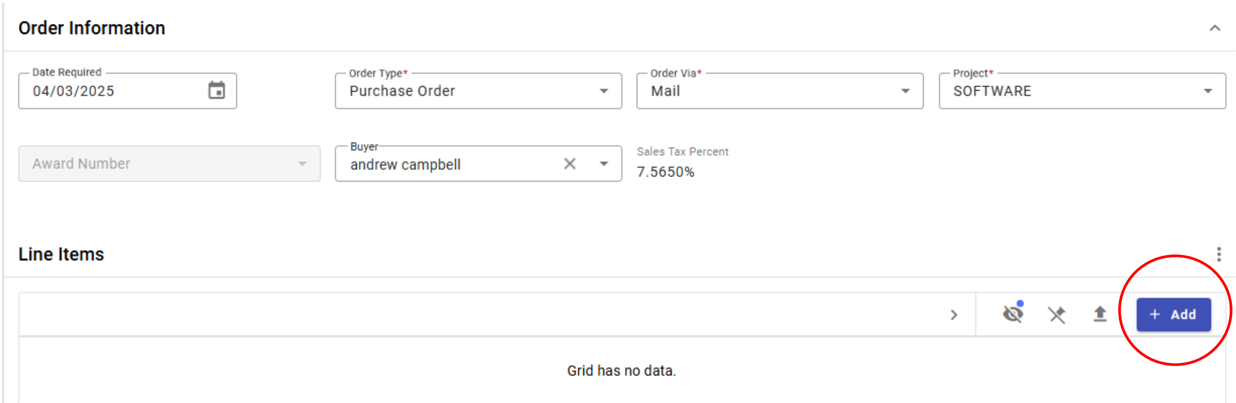
Note: unsigned contracts should be attached as quotes. After the PO is created, take Quote to Mr. Chavez to sign (only Mr. Chavez can sign contracts per Policy), then send the signed contract to Raney Weiler. She will attach the signed contract to the PO as a Contract.

ALL POs should be created prior to placing orders, and prior to receiving invoices. Do not attach an invoice to a PR. These should be sent to Raney Weiler for processing.

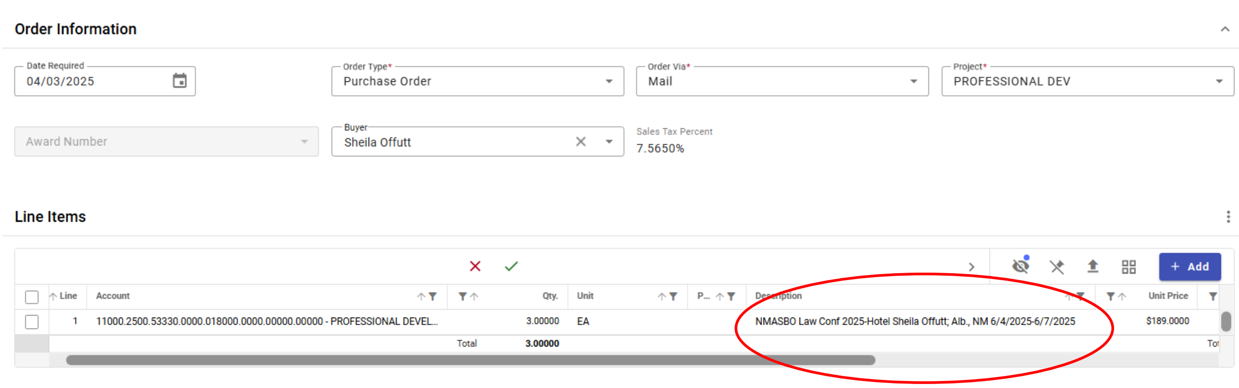


After clicking Save, proceed to enter PO Lines.

24. Click Add to enter line by line, or skip to #32 for instructions on how to upload a spreadsheet file of your PO.



25. Begin keying in the correct Account Code. When the Code appears above/below the box, select the correct code.
26. Click Tab; Enter the Quantity.
27. Click Tab; Enter Unit/Part Number as needed; Click Tab to move through cells.
28. Click on the Description (which is pre-populated) and Key Over (you may copy and paste from your quote). Do not leave original account description.



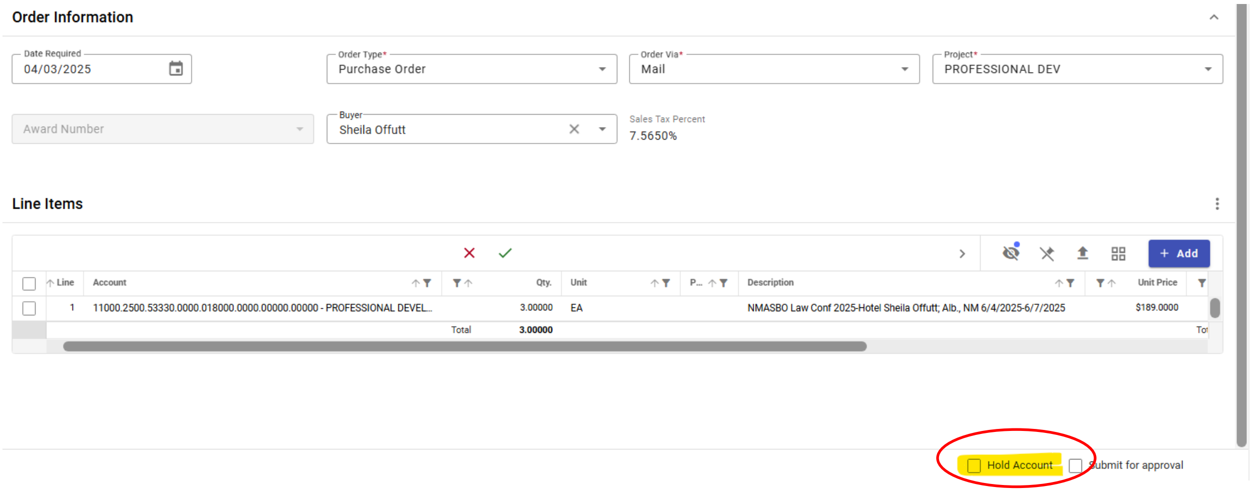
29. Follow the following PO Format for all Travel:

PO FORMAT

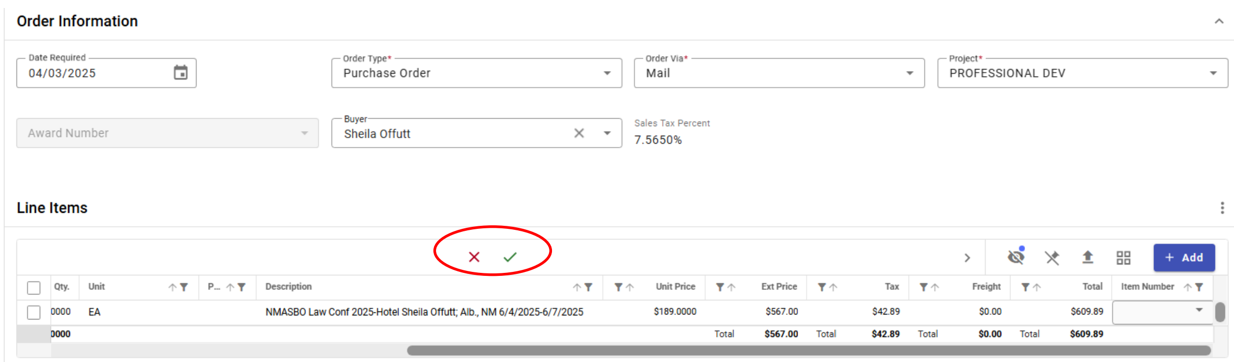
Each line on the all POs associated with the travel/event should follow this pattern regardless of the fund:

- Name of Conf. Regis. Name of employee, location, dates
- Name of Conf. Meals/Parking Reim. Name of employee, location, dates
- Name of Conf. Flights. Name of employee, location, dates, Airline Company
- Name of Conf. Car Rental. Name of employee, location, dates, Rental Company
- Etc.

30. If entering multiple lines with the same account code, you may use the Hold Account option at the bottom of the screen.



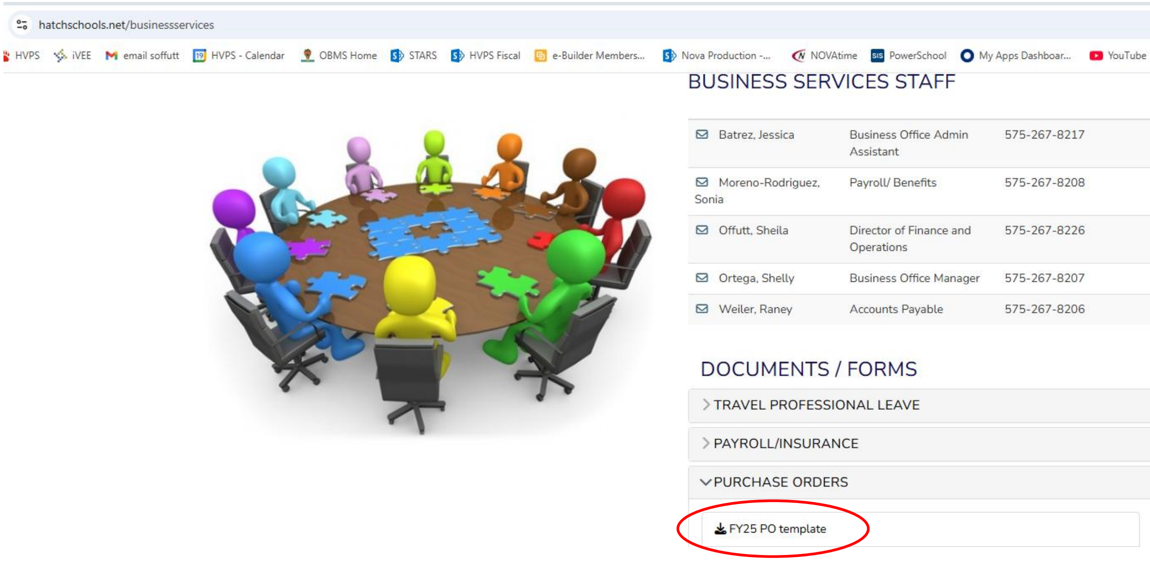
31. Click the green Check mark if they screen does not let you advance.



32. Steps 32-39 are instructions to upload a spreadsheet. If entering line by line, skip to Step 40.
33. Download and Open the PO Template spreadsheet, found on the Business Services tab of the District Website under Purchase Orders. This must be downloaded and opened in EXCEL. DO NOT USE GOOGLE SHEETS.

    It can also be accessed at:

https://content.myconnectsuite.com/api/documents/f6d2b739c12c47b2b63e496ce8fbb6d0.xlsx



34. Enter Descriptions of items to be purchased, part numbers, Unit can remain EA, Quantity, Unit Price, Freight, etc. You may enter 0.00 for Tax and Freight. Enter the account code and the account description (i.e., PrePaid Professional Development; General Supplies & Materials, etc. You may leave the Item Number blank. Please enter ISBN numbers in Part No. Column, without any dashes.

The spreadsheet is especially helpful when placing large orders, as you can copy and paste from quote.

Column M is for your reference only, to double check that your subtotal is correct. Delete Columns L and M before uploading. Delete any empty rows at the bottom that are not used. These are highlighted salmon for you. You may add more rows, but not any more columns.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Line	Description	Part No.	Unit	Qty.	Unit Price	Tax	Freight	Account	Account Description	Item Number	Remove these columns before uploading	
2	1	Language Power: Grades K-2 Level A, 2nd Edition	128235	EA	19	$799.99	0	$911.99	11000.1000.56105.1010.018050.0000.00000.00000	ADOPTED MATERIALS		total should be	$16,111.80
3	2	Language Power: Grades K-2 Level B, 2nd Edition	128236	EA	19	$799.99	0	$911.99	11000.1000.56105.1010.018050.0000.00000.00000	ADOPTED MATERIALS		total should be	$16,111.80
4	3	Language Power: Grades K-2 Level C, 2nd Edition	128237	EA	19	$799.99	0	$911.99	11000.1000.56105.1010.018050.0000.00000.00000	ADOPTED MATERIALS		total should be	$16,111.80
5	7	Language Power: Grades K-2 Level A, 2nd Edition: Student Collection	925714	EA	6	$239.99	0	$86.40	11000.1000.56105.1010.018050.0000.00000.00000	ADOPTED MATERIALS		total should be	$1,526.34
6	8	Language Power: Grades K-2 Level B, 2nd Edition: Student Collection	925715	EA	6	$239.99	0	$86.40	11000.1000.56105.1010.018050.0000.00000.00000	ADOPTED MATERIALS		total should be	$1,526.34
7	9	Language Power: Grades K-2 Level C, 2nd Edition: Student Collection	925716	EA	6	$239.99	0	$86.40	11000.1000.56105.1010.018050.0000.00000.00000	ADOPTED MATERIALS		total should be	$1,526.34
8	10	Language Power: Grades K-2 Level A, 2nd Edition: Student Guided Practice E	922943	EA	20	$11.99	0	$14.39	11000.1000.56105.1010.018050.0000.00000.00000	ADOPTED MATERIALS		total should be	$254.19
9	11	Language Power: Grades K-2 Level B, 2nd Edition: Student Guided Practice E	922944	EA	20	$11.99	0	$14.39	11000.1000.56105.1010.018050.0000.00000.00000	ADOPTED MATERIALS		total should be	$254.19
10	12	Language Power: Grades K-2 Level C, 2nd Edition: Student Guided Practice E	922945	EA	20	$11.99	0	$14.39	11000.1000.56105.1010.018050.0000.00000.00000	ADOPTED MATERIALS		total should be	$254.19
11	13												
12	14												
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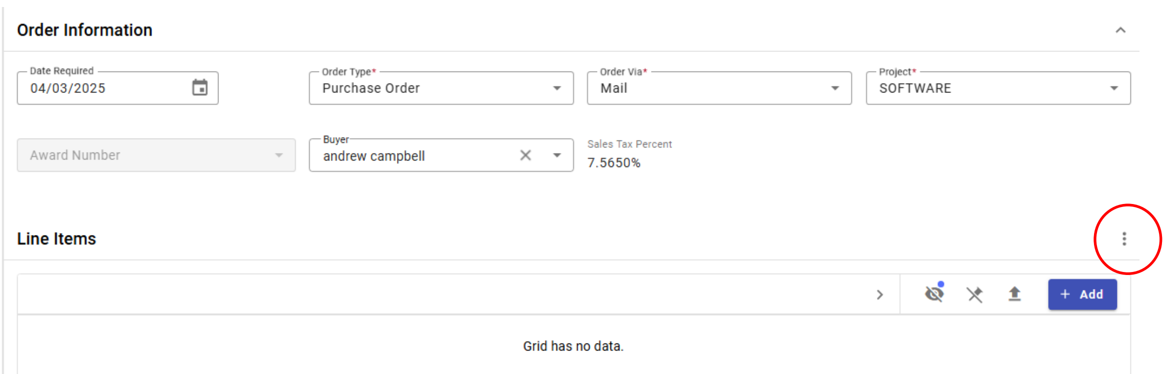
28	30												

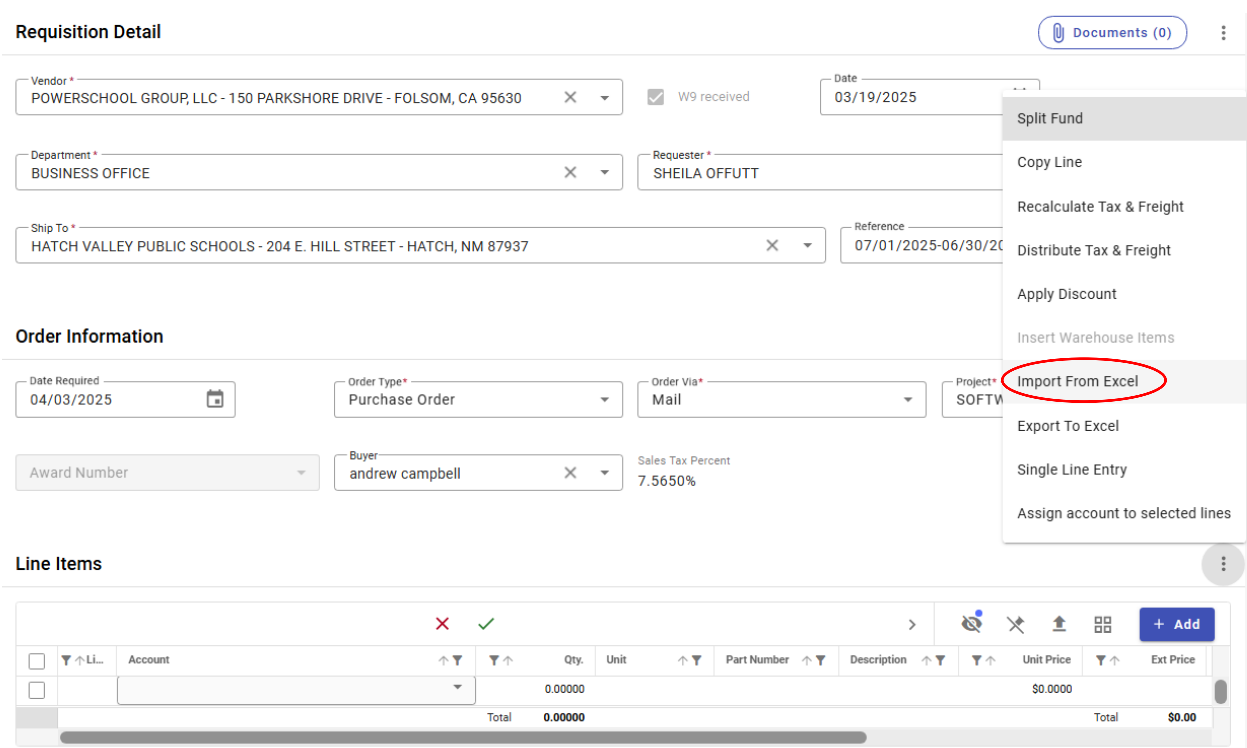
35. Once the Spreadsheet is completed and Columns L & M, and all blank rows are deleted Save your file. Your file should look like this:

Line	Description	Part No.	Unit	Qty.	Unit Price	Tax	Freight	Account	Account Description	Item Number
1	Language Power: Grades K-2 Level A, 2nd Edition	128235	EA	19	$799.99	0	0	11000.1000.56105.1010.018050.0000.00000.00000	ADOPTED MATERIALS	
2	Language Power: Grades K-2 Level B, 2nd Edition	128236	EA	19	$799.99	0	0	11000.1000.56105.1010.018050.0000.00000.00000	ADOPTED MATERIALS	
3	Language Power: Grades K-2 Level C, 2nd Edition	128237	EA	19	$799.99	0	0	11000.1000.56105.1010.018050.0000.00000.00000	ADOPTED MATERIALS	
7	Language Power: Grades K-2 Level A, 2nd Edition: Student Collection	925714	EA	6	$239.99	0	0	11000.1000.56105.1010.018050.0000.00000.00000	ADOPTED MATERIALS	
8	Language Power: Grades K-2 Level B, 2nd Edition: Student Collection	925715	EA	6	$239.99	0	0	11000.1000.56105.1010.018050.0000.00000.00000	ADOPTED MATERIALS	
9	Language Power: Grades K-2 Level C, 2nd Edition: Student Collection	925716	EA	6	$239.99	0	0	11000.1000.56105.1010.018050.0000.00000.00000	ADOPTED MATERIALS	
10	Language Power: Grades K-2 Level A, 2nd Edition: Student Guided Practice E	922943	EA	20	$11.99	0	0	11000.1000.56105.1010.018050.0000.00000.00000	ADOPTED MATERIALS	
11	Language Power: Grades K-2 Level B, 2nd Edition: Student Guided Practice E	922944	EA	20	$11.99	0	0	11000.1000.56105.1010.018050.0000.00000.00000	ADOPTED MATERIALS	
12	Language Power: Grades K-2 Level C, 2nd Edition: Student Guided Practice E	922945	EA	20	$11.99	0	0	11000.1000.56105.1010.018050.0000.00000.00000	ADOPTED MATERIALS	

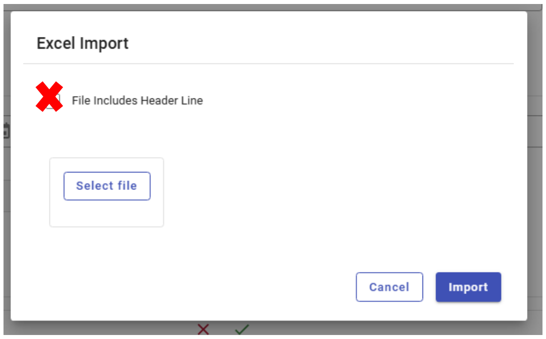
36. Click on the three dots above the Add button on the PR.



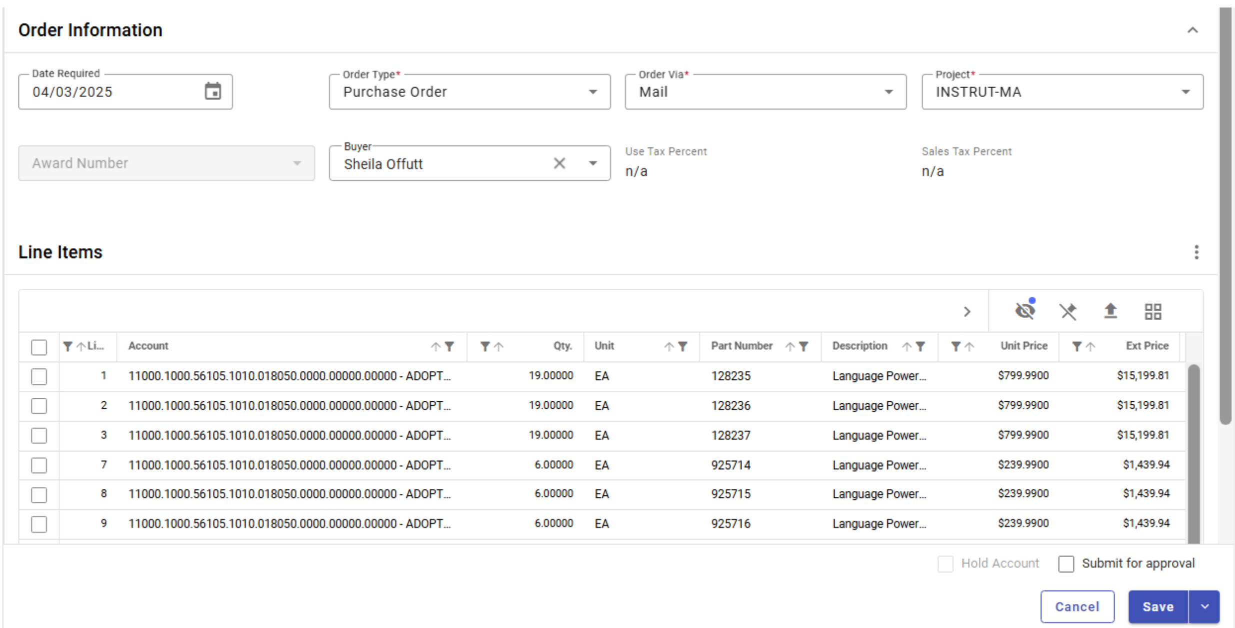
37. Select Import from Excel



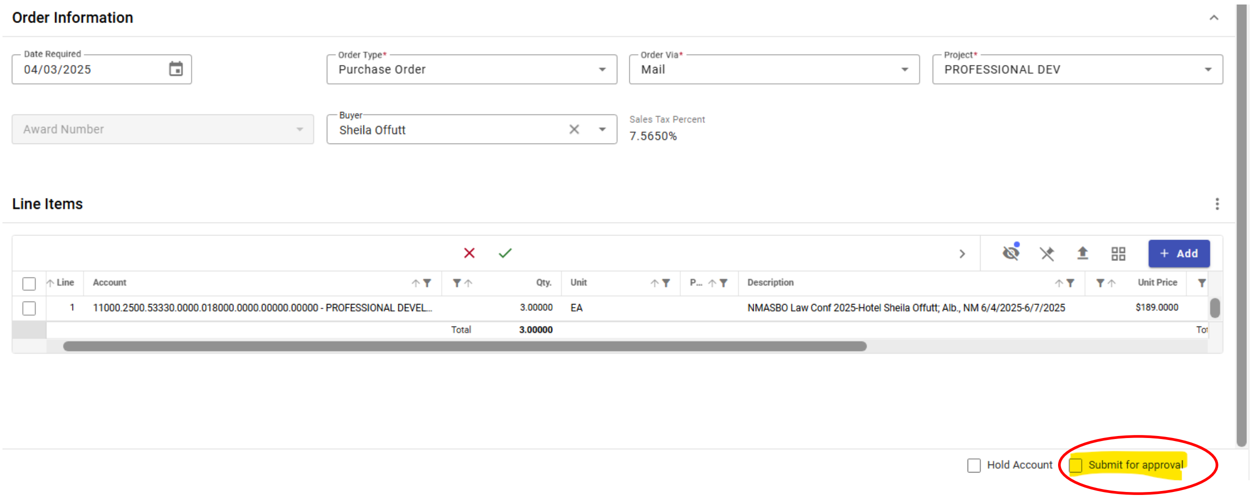
38. Check the box that your File Includes Header Line, click Select file, choose your file from the file location, click Open, then click Import.



39. Items will automatically populate in the PR!



40. When all lines have been entered, click Submit for Approval at the bottom of the screen, then click Save.



41. Click Save to submit PR to the next Approver.