

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.

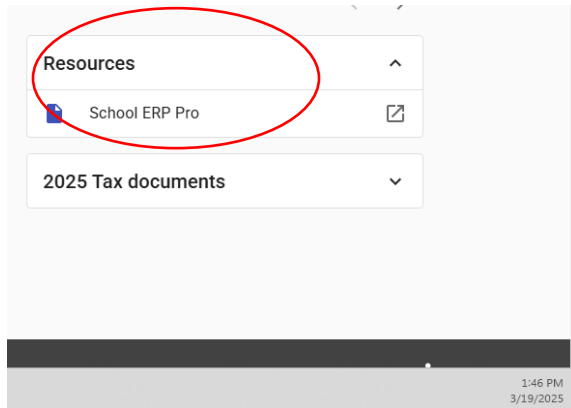
14. PO Process is **COMPLETE!**

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

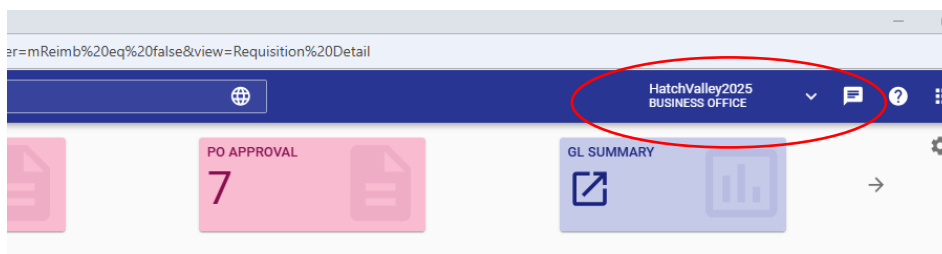
How to Enter a Purchase Requisition

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.

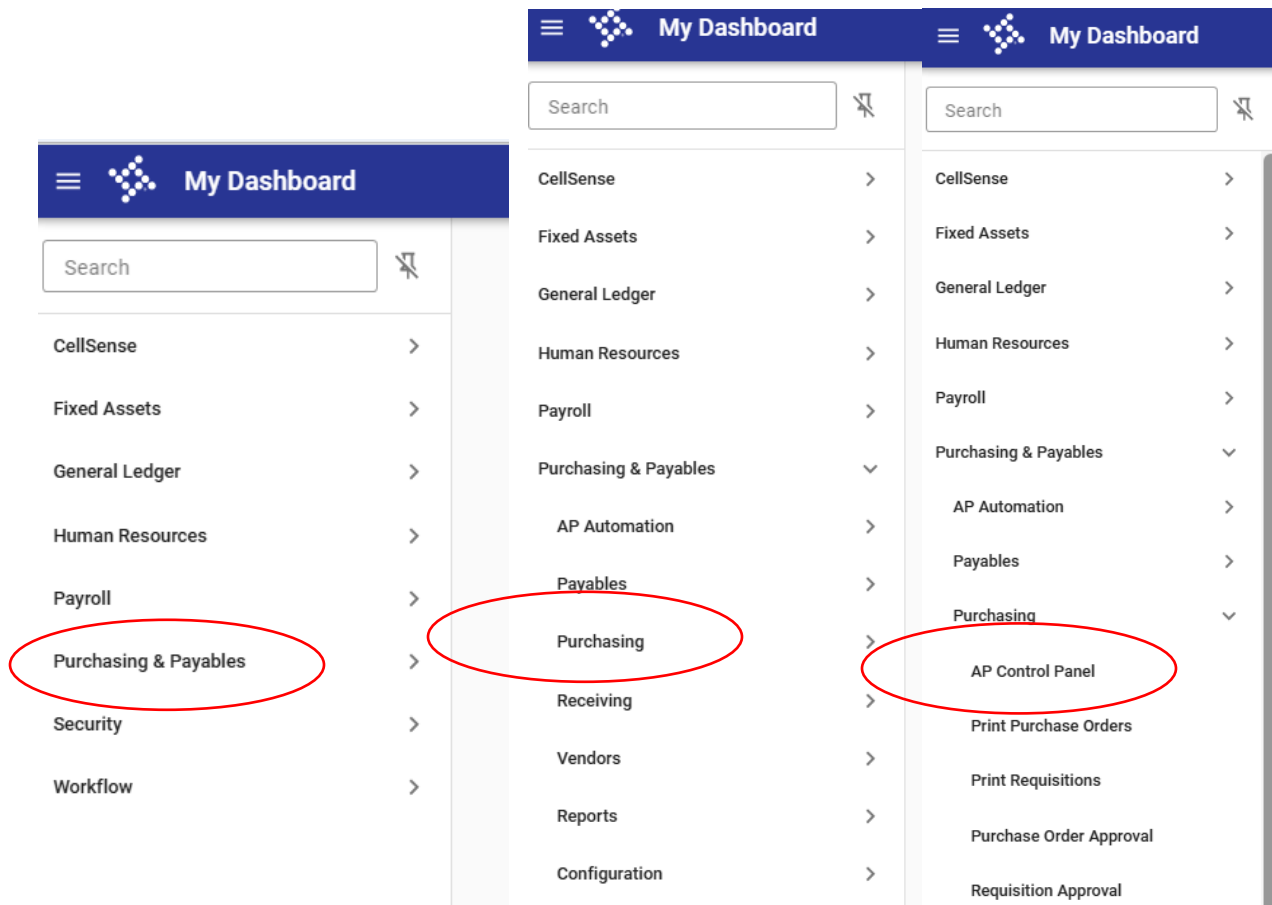
1. Navigate to <https://www.hatchschools.net/>
2. Click Staff Resources <https://www.hatchschools.net/staffresources>
3. Click Employee Self-Service (iVisions)
<https://hatchvalleypsnm.tylerportico.com/tesp/employee-selfservice/>
4. Enter your School Email address in the username box.
5. If you have 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.



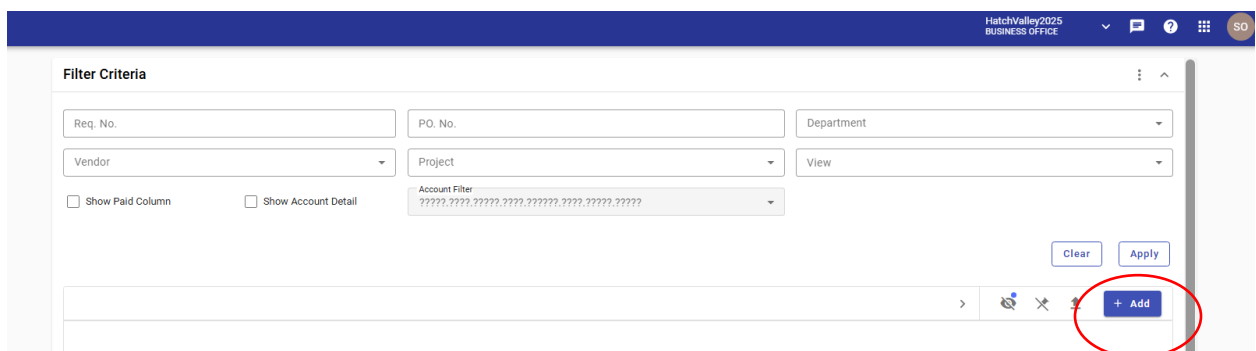
9. Confirm that the year at the top right is the current year (the year of the spring semester of any given year, i.e., 2025-2026 school year is Fiscal Year 2026, so you should be on HatchValley2026.)



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



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



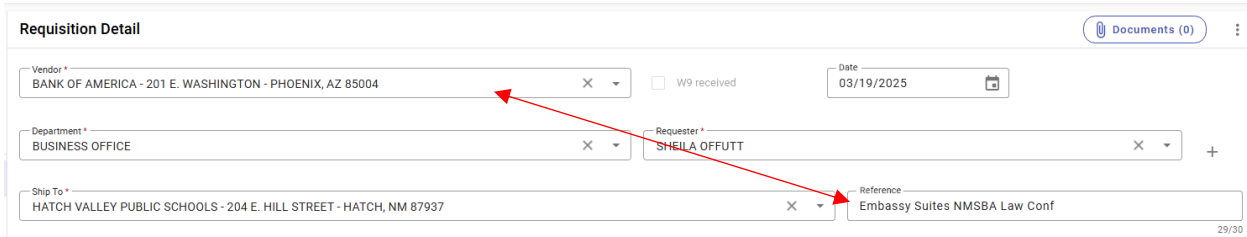
12. Start keying in the Vendor. If the Vendor name does not appear, please contact Jessica Batrez as she will need to enter the Vendor in iVisions. She will give you a new Vendor form, and you will need to request a W-9 from the vendor then will submit the W-9 and form to Jessica Batrez. She will contact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



Requisition Detail

Vendor * BANK OF AMERICA - 201 E. WASHINGTON - PHOENIX, AZ 85004 X

Department * BUSINESS OFFICE X

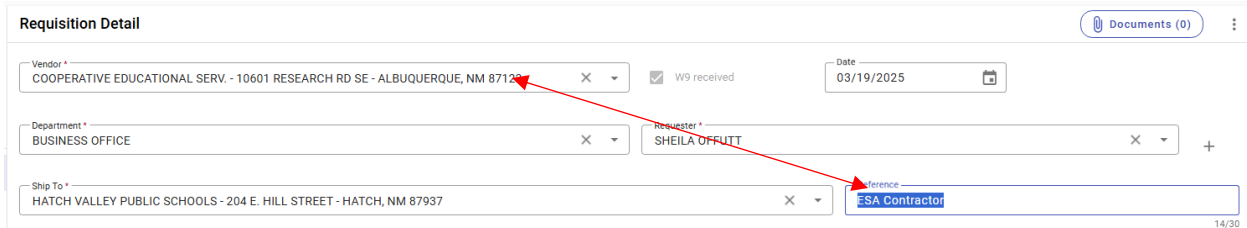
Ship To * HATCH VALLEY PUBLIC SCHOOLS - 204 E. HILL STREET - HATCH, NM 87937 X

Requester * SHEILA OFFUTT X

Reference Embassy Suites NMSBA Law Conf

29/30

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



Requisition Detail

Vendor * COOPERATIVE EDUCATIONAL SERV. - 10601 RESEARCH RD SE - ALBUQUERQUE, NM 87124 X

Department * BUSINESS OFFICE X

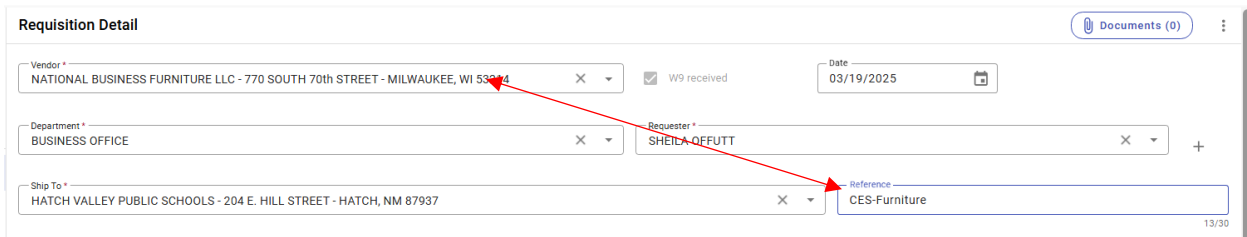
Ship To * HATCH VALLEY PUBLIC SCHOOLS - 204 E. HILL STREET - HATCH, NM 87937 X

Requester * SHEILA OFFUTT X

Reference ESA Contractor

14/30

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



Requisition Detail

Vendor * NATIONAL BUSINESS FURNITURE LLC - 770 SOUTH 70th STREET - MILWAUKEE, WI 53244 X

Department * BUSINESS OFFICE X

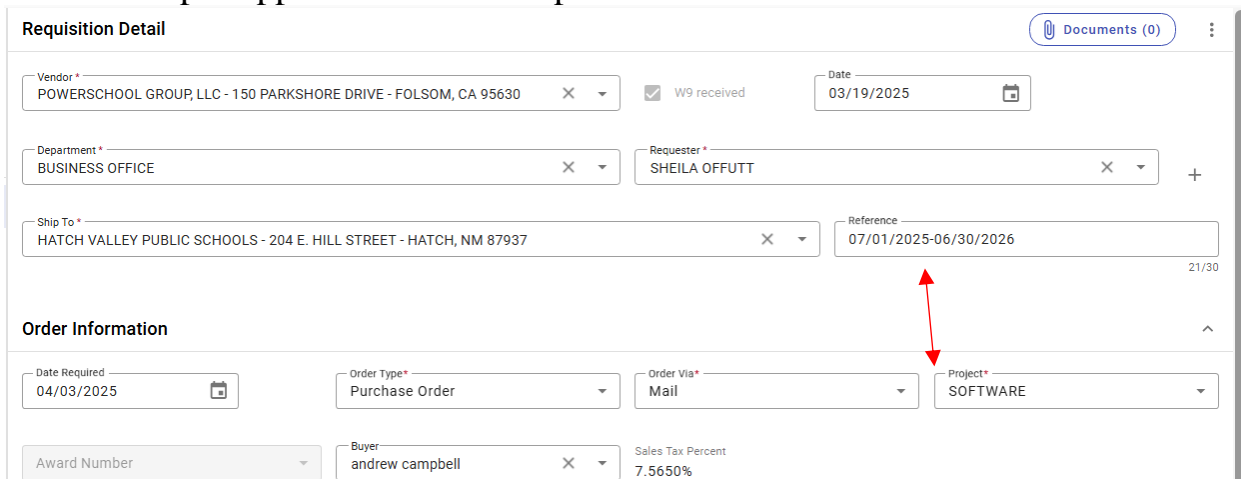
Ship To * HATCH VALLEY PUBLIC SCHOOLS - 204 E. HILL STREET - HATCH, NM 87937 X

Requester * SHEILA OFFUTT X

Reference CES-Furniture

13/30

- 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.



Requisition Detail

Vendor * POWERSCHOOL GROUP, LLC - 150 PARKSHORE DRIVE - FOLSOM, CA 95630 X

Department * BUSINESS OFFICE X

Ship To * HATCH VALLEY PUBLIC SCHOOLS - 204 E. HILL STREET - HATCH, NM 87937 X

Requester * SHEILA OFFUTT X

Reference 07/01/2025-06/30/2026

21/30

Order Information

Date Required 04/03/2025

Order Type * Purchase Order

Order Via * Mail

Project * SOFTWARE

Award Number

Buyer andrew campbell X

Sales Tax Percent 7.5650%

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)

The screenshot shows a web application interface for entering requisition details. On the left is a sidebar with navigation links: 'Requisition Detail' (highlighted), 'Purchase Order', 'Addresses', and 'Notes'. The main content area is titled 'Requisition Detail' and contains several sections:

- Requisition Detail Section:** Includes fields for 'Vendor *' (with a red border and error message 'Vendor is required.'), 'Department *' (with a red border and error message 'Department is required.'), 'Requester', 'Date' (03/19/2025), 'W9 received' checkbox, and 'Ship To *' (HATCH VALLEY PUBLIC SCHOOLS - 204 E. HILL STREET - HATCH, NM 87937).
- Order Information Section:** Includes 'Date Required' (04/03/2025), 'Order Type *' (Purchase Order), 'Order Via *' (Mail), 'Project *' (dropdown menu), 'Award Number', 'Buyer', and 'Use Tax Percent' (n/a).
- Line Items Section:** A table with the message 'Grid has no data.'

A red circle highlights the 'Project *' dropdown menu, which is currently open and shows the following options: 'UNDEFINED', '22000-ATHL', '4107 Well Rounded', '4108 Safe & Healthy', '4109 Technology', and 'ACTIVITY BUS REPAIR'. At the bottom right, there are checkboxes for 'Hold Account' and 'Submit for approval', and 'Cancel' and 'Save' buttons.

17. Select the Buyer from the Drop-Down Menu

Requisition Detail Documents (0)

Vendor *
BANK OF AMERICA - 201 E. WASHINGTON - PHOENIX, AZ 85004

W9 received ☐

Date
03/19/2025

Department *
BUSINESS OFFICE

Requester *
SHEILA OFFUTT

Ship To *
HATCH VALLEY PUBLIC SCHOOLS - 204 E. HILL STREET - HATCH, NM 87937

Reference
Embassy Suites NMSBA Law Conf

29/30

Order Information

Date Required
04/03/2025

Order Type *
Purchase Order

Order Via *
Mail

Project *
PROFESSIONAL DEV

Award Number

Buyer
Sheila Offutt

Sales Tax Percent
7.5650%

Line Items

+ Add

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

Requisition Number
0

PO Number
0

Total
\$609.89

Requisition Detail

Purchase Order

Addresses

Notes

Requisition Detail

Vendor *
BANK OF AMERICA - 201 E. WASHINGTON - PHOENIX, AZ 85004

Department *
BUSINESS OFFICE

Ship To *
HATCH VALLEY PUBLIC SCHOOLS - 204 E. HILL STREET - HATCH, NM 87937

Order Information

Date Required
04/03/2025

Order Type *
Purchase Order

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.

Requisition Number 0	Notes
PO Number 0	
Total \$609.89	
Requisition Detail	
Purchase Order	Internal Notes
Addresses	
Notes	Append Internal Notes

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


Requisition Number 0	Notes
PO Number 0	
Total \$609.89	
Requisition Detail	
Purchase Order	Internal Notes Leadership Team traveling to Albuquerque to Annual Law Conference
Addresses	
Notes	Append Internal Notes

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

<p>Requisition Number 0</p> <p>PO Number 0</p> <p>Total \$609.89</p>	<h3>Notes</h3> <div><p>Notes</p></div> <div><p>Internal Notes</p><p>Leadership Team traveling to Albuquerque to Annual Law Conference</p></div>
<p>Requisition Detail</p> <p>Purchase Order</p> <p>Addresses</p> <p>Notes</p>	

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

Requisition Detail

 Documents (0)

Vendor *
BANK OF AMERICA - 201 E. WASHINGTON - PHOENIX, AZ 85004

W9 received ☐

Date
03/19/2025

Department *
BUSINESS OFFICE

Requester *
SHEILA OFFUTT

Ship To *
HATCH VALLEY PUBLIC SCHOOLS - 204 E. HILL STREET - HATCH, NM 87937

Reference
Embassy Suites NMSBA Law Conf

29/30

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.

The screenshot shows a web form titled "Document". It has two main sections: "Selection" and "Document Information".

- Selection:** Contains two input fields: "Req. Number" with the value "5119" and "PO Number" with the value "0".
- Document Information:** Contains several elements:
 - A "Date Last Updated" field with the value "3/19/2025" and a character count "9/50".
 - A "Select file" button, indicated by a red arrow and the number "1".
 - A "Document Type" dropdown menu, indicated by a red arrow and the number "2".
 - A "Notes" text area with the value "Notes" and a character count "0/50", indicated by a red arrow and the number "3".
 - A checkbox labeled "Send document with Purchase Order", indicated by a red arrow and the number "4".
 - "Cancel" and "Save" buttons at the bottom right, indicated by a red arrow and the number "5".

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.

This screenshot shows the same "Document" form, but with a completed example. The "Document Type" dropdown is set to "QUOTE". The "Notes" field contains "2024-2025 Quote for Mathia Software". The "Send document with Purchase Order" checkbox is checked. The "Date Last Updated" field shows "3/19/2025". The "Req. Number" field shows "5119" and the "PO Number" field shows "0". The "Select file" button is now labeled with the filename "Hatch Valley Public Sch Dist Math 180 (Ed) FLEX 1YR CP-1.pdf" and a close icon. The "Cancel" and "Save" buttons are at the bottom right.

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.

Order Information

Date Required: 04/03/2025
Order Type: Purchase Order
Order Via: Mail
Project: SOFTWARE
Award Number:
Buyer: andrew campbell
Sales Tax Percent: 7.5650%

Line Items

Grid has no data.

+ Add

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.

Order Information

Date Required: 04/03/2025
Order Type: Purchase Order
Order Via: Mail
Project: PROFESSIONAL DEV
Award Number:
Buyer: Sheila Offutt
Sales Tax Percent: 7.5650%

Line Items

Line	Account	Qty.	Unit	Description	Unit Price
1	11000.2500.53330.0000.018000.0000.000000.000000 - PROFESSIONAL DEVEL...	3.00000	EA	NMAASO Law Conf 2025-Hotel Sheila Offutt; Alb., NM 6/4/2025-6/7/2025	\$189.0000
Total				3.00000	

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.

Order Information

Date Required: 04/03/2025
Order Type: Purchase Order
Order Via: Mail
Project: PROFESSIONAL DEV

Award Number:
Buyer: Sheila Offutt
Sales Tax Percent: 7.5650%

Line Items

Line	Account	Qty.	Unit	Description	Unit Price
1	11000.2500.53330.0000.018000.0000.00000.00000 - PROFESSIONAL DEVEL...	3.00000	EA	NMASBO Law Conf 2025-Hotel Sheila Offutt; Alb, NM 6/4/2025-6/7/2025	\$189.0000
Total		3.00000			

☐ Hold Account ☐ Submit for approval

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

Order Information

Date Required: 04/03/2025
Order Type: Purchase Order
Order Via: Mail
Project: PROFESSIONAL DEV

Award Number:
Buyer: Sheila Offutt
Sales Tax Percent: 7.5650%

Line Items

Qty.	Unit	Description	Unit Price	Ext Price	Tax	Freight	Total	Item Number
0000	EA	NMASBO Law Conf 2025-Hotel Sheila Offutt; Alb, NM 6/4/2025-6/7/2025	\$189.0000	\$567.00	\$42.89	\$0.00	\$609.89	
Total				\$567.00	\$42.89	\$0.00	\$609.89	

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>

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	A	B	C	D	E	F	G	H	I	J	K	L	M
1		Description	Part No.	Unit	Qty.	Unit Price	Tax	Freight	Account	Account Description	Item Number		
2	1	Language Power: Grades K-2 Level A, 2nd Edition	128235	EA	19	\$799.99	0	0	11000.1000.56105.1010.018050.0000.000000.00000	ADOPTED MATERIALS			
3	2	Language Power: Grades K-2 Level B, 2nd Edition	128236	EA	19	\$799.99	0	0	11000.1000.56105.1010.018050.0000.000000.00000	ADOPTED MATERIALS			
4	3	Language Power: Grades K-2 Level C, 2nd Edition	128237	EA	19	\$799.99	0	0	11000.1000.56105.1010.018050.0000.000000.00000	ADOPTED MATERIALS			
5	7	Language Power: Grades K-2 Level A, 2nd Edition: Student Collection	325714	EA	6	\$239.99	0	0	11000.1000.56105.1010.018050.0000.000000.00000	ADOPTED MATERIALS			
6	8	Language Power: Grades K-2 Level B, 2nd Edition: Student Collection	325715	EA	6	\$239.99	0	0	11000.1000.56105.1010.018050.0000.000000.00000	ADOPTED MATERIALS			
7	9	Language Power: Grades K-2 Level C, 2nd Edition: Student Collection	325716	EA	6	\$239.99	0	0	11000.1000.56105.1010.018050.0000.000000.00000	ADOPTED MATERIALS			
8	10	Language Power: Grades K-2 Level A, 2nd Edition: Student Guided Practice	322943	EA	20	\$11.99	0	0	11000.1000.56105.1010.018050.0000.000000.00000	ADOPTED MATERIALS			
9	11	Language Power: Grades K-2 Level B, 2nd Edition: Student Guided Practice	322944	EA	20	\$11.99	0	0	11000.1000.56105.1010.018050.0000.000000.00000	ADOPTED MATERIALS			
10	12	Language Power: Grades K-2 Level C, 2nd Edition: Student Guided Practice	322945	EA	20	\$11.99	0	0	11000.1000.56105.1010.018050.0000.000000.00000	ADOPTED MATERIALS			
11													
12													
13													
14													

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

Order Information

Date Required
04/03/2025
Order Type
Purchase Order
Order Via
Mail
Project
SOFTWARE

Award Number
Buyer
andrew campbell
Sales Tax Percent
7.5650%

Line Items

>
+ Add

Grid has no data.

37. Select Import from Excel

Requisition Detail

Vendor
POWERSCHOOL GROUP, LLC - 150 PARKSHORE DRIVE - FOLSOM, CA 95630
W9 received
Date
03/19/2025

Department
BUSINESS OFFICE
Requester
SHEILA OFFUTT

Ship To
HATCH VALLEY PUBLIC SCHOOLS - 204 E. HILL STREET - HATCH, NM 87937
Reference
07/01/2025-06/30/2026

Order Information

Date Required
04/03/2025
Order Type
Purchase Order
Order Via
Mail
Project
SOFTWARE

Award Number
Buyer
andrew campbell
Sales Tax Percent
7.5650%

Line Items

+ Add

	Account	Qty.	Unit	Part Number	Description	Unit Price	Ext Price
		0.00000				\$0.0000	
Total		0.00000					\$0.00

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.

Excel Import

File Includes Header Line

Select file

Cancel

Import

39. Items will automatically populate in the PR!

Order Information

Date Required
04/03/2025

Order Type*
Purchase Order

Order Via*
Mail

Project*
INSTRUT-MA

Award Number

Buyer
Sheila Offutt

Use Tax Percent
n/a

Sales Tax Percent
n/a

Line Items

		Account	Qty.	Unit	Part Number	Description	Unit Price	Ext Price
<input type="checkbox"/>	1	11000.1000.56105.1010.018050.0000.00000.00000 - ADOPT...	19.00000	EA	128235	Language Power...	\$799.9900	\$15,199.81
<input type="checkbox"/>	2	11000.1000.56105.1010.018050.0000.00000.00000 - ADOPT...	19.00000	EA	128236	Language Power...	\$799.9900	\$15,199.81
<input type="checkbox"/>	3	11000.1000.56105.1010.018050.0000.00000.00000 - ADOPT...	19.00000	EA	128237	Language Power...	\$799.9900	\$15,199.81
<input type="checkbox"/>	7	11000.1000.56105.1010.018050.0000.00000.00000 - ADOPT...	6.00000	EA	925714	Language Power...	\$239.9900	\$1,439.94
<input type="checkbox"/>	8	11000.1000.56105.1010.018050.0000.00000.00000 - ADOPT...	6.00000	EA	925715	Language Power...	\$239.9900	\$1,439.94
<input type="checkbox"/>	9	11000.1000.56105.1010.018050.0000.00000.00000 - ADOPT...	6.00000	EA	925716	Language Power...	\$239.9900	\$1,439.94

☐ Hold Account ☐ Submit for approval

Cancel

Save

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

Order Information

Date Required: 04/03/2025
Order Type*: Purchase Order
Order Via*: Mail
Project*: PROFESSIONAL DEV
Award Number:
Buyer: Sheila Offutt
Sales Tax Percent: 7.5650%

Line Items

Line	Account	Qty.	Unit	Description	Unit Price
1	11000.2500.53330.0000.018000.0000.00000 - PROFESSIONAL DEVEL...	3.00000	EA	NMASBO Law Conf 2025-Hotel Sheila Offutt; Alb., NM 6/4/2025-6/7/2025	\$189.0000
Total		3.00000			

☐ Hold Account

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

Order Information

Date Required: 04/03/2025
Order Type*: Purchase Order
Order Via*: Mail
Project*: PROFESSIONAL DEV
Award Number:
Buyer: Sheila Offutt
Sales Tax Percent: 7.5650%

Line Items

Qty.	Unit	Description	Unit Price	Ext Price	Tax	Freight	Total	Item Number
0000	EA	NMASBO Law Conf 2025-Hotel Sheila Offutt; Alb., NM 6/4/2025-6/7/2025	\$189.0000	\$567.00	\$42.89	\$0.00	\$609.89	
0000		Total		\$567.00	Total \$42.89	Total \$0.00	Total \$609.89	

☐ Hold Account ☒ Submit for approval