

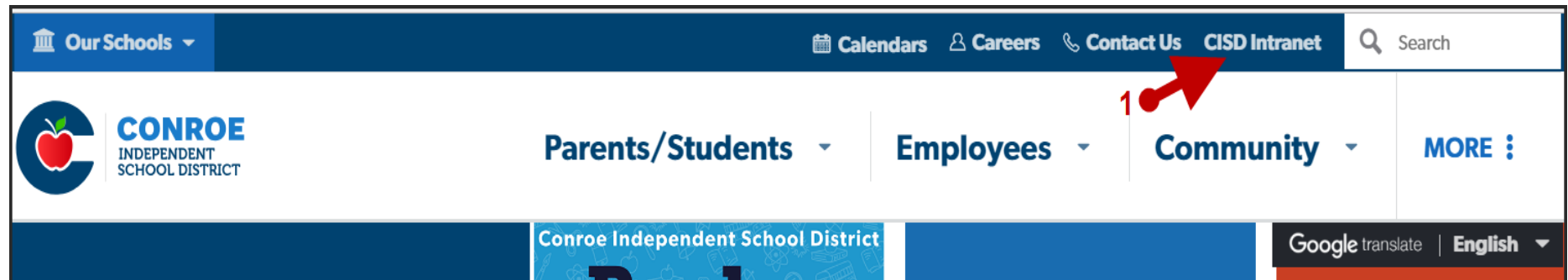


CONROE
INDEPENDENT
SCHOOL DISTRICT

PURCHASING UPDATES & REMINDERS 2019-2020

Finding the information you need is as easy as 1-2-3!

1. On the CISD main website, click on CISD Intranet in the top menu bar



2. Click on the Green Financial Services icon

3. Click on Purchasing – Internal

Employee Apps - Frequently Used

Welcome to the Conroe ISD Intranet. Click an icon below to log in. Recommended browsers are noted by the icons in the corners of select applications.



❖ Bookmark This page!

HOME // FINANCIAL **Financial Services-Internal**

ACCOUNTS PAYABLE – INTERNAL →
ACTIVITY FUNDS – INTERNAL →
FINANCE & BUDGET – INTERNAL →



PAYROLL – INTERNAL →
PURCHASING – INTERNAL →
WAREHOUSE – INTERNAL →



HOME // FINANCIAL SERVICES-INTERNAL // PURCHASING-INTERNAL

Purchasing-Internal

WELCOME TO PURCHASING!

Please view the information and resources we have available to assist you with the Purchasing process. Do not hesitate to [contact us](#) for assistance. We are here to help.

Quick Links



Shopping A-Z	eFinance How To Instructions	Travel Requests & Travel Forms	Information for Requisition Entry
Cooperatives	Instructions for Using Specific Vendors	Forms	Contact Us
Technology Purchasing website	CISD Warehouses	Finance Manual	Vendor Evaluation Form

Requisition Entry

To purchase using budget funds a purchase requisition must be entered. Find appropriate vendors and instructions for purchasing from those vendors by using the **Shopping A-Z** category list. Vendors awarded on a

- > [Shopping A-Z](#)
- > [CISD Awarded Vendor List](#)

Shopping A-Z

[Back to Purchasing-Internal →](#)

Click on a letter to jump down to that panel

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

A a

+ Activity Fund Checks

- AED's and Accessories

AED ORDERING

Commodity 500-001

For all NEW AED purchases contact CISD Health Services at ph#936-709-7754 or email [Barbara Robertson](#).

The new district standard is the [HeartSine 350p AED](#). It is replacing the Heartstart FR2 & FRX.

Accessories for both models along with current pricing are here: [AED Price List PDF](#) →

Vendor: [Sterlington Medical](#). Contact Tad Overstreet at 832-766-6799 or tad@sterlingtonmedical.com

To enter a Requisition:

- Vendor: 37001547 – Sterlington Medical
- Bid Reference/Comments: Buyboard
- Commodity: 500-001
- Shipping: 1 item- add \$10 to order. 2 or more items – free shipping.

Information listed under each area including commodity code, ordering instructions, pricing, etc. Be sure to check the website as updates will be posted here.

Vendor Evaluation Form

Vendor Evaluation Form

Please provide detailed feedback on your experience with the vendor. The Purchasing Department will document this information in the vendor file and follow up with the vendor and employee on the incident. Please provide positive feedback as well in order to recognize vendors for going above and beyond to provide excellent customer service.



[**Vendor Evaluation Form**](#)

Located on the Purchasing Internal Page

Opportunity to give positive/negative feedback in regards to vendor performance.

Assists in awarding vendors for future contracts.

REQUISITION ENTRY

- **Dept. code**- Choose the right one. It sets the path for the approval route. Use T if Technology, F if Federal, travel, etc.
- **Buyer Line** – Enter the full name of person entering requisition.
-  **Notes – enter the Vendor Quote Number here!**
- **Description** – List model # and description. We need to be able to tell what it is. Ex: HP4798 - Printer
- **Comments** – List the bid reference or Travel Approval, Travel PO#. List info on 1st line. Do not list a vendor quote # here. Check vendor quote for correct co-op reference (Buyboard, DIR, etc).
- **Attention line** – list who warehouse will deliver to. Ex. Jane Doe/ Rm 201 or Clark Int./ Jane Doe (if Dept. enters for campus).
- Limit a requisition to 30 lines – including shipping.
-  **Attach the vendor quote to the requisition!**
- See the eFinancePlus How To Enter a Requisition instructions and Requisition Requirements- Cheat Sheet on Purchasing- Internal website for more detailed instructions.

FEDERAL FUND GUIDELINES

FEDERAL FUNDS (EDGAR)					
Purchase Commitment Amount	Support Required	Additional Forms	RFP/RFQ	Board Approval	Advertising
For purchases less than \$10,000.00 FEDERAL FUNDS (Micro Purchase) ¹	1 QUOTES	ATTACHED TO REQUISITION	NOT REQUIRED	NOT REQUIRED	NOT REQUIRED
For purchases of \$10,000.01 to \$49,999.99 FEDERAL FUNDS ¹	3 QUOTES FROM COOP AND/OR NON-AWARDED VENDORS	3 QUOTE + QUOTE FORM ATTACHED TO REQUISITION	NOT REQUIRED	NOT REQUIRED	NOT REQUIRED
For purchases over \$50,000.00 FEDERAL FUNDS	FORMAL BIDS (Education Code 44.031)	NOT REQUIRED	REQUIRED	AGENDA ITEM REQUIRED	REQUIRED * two (2) consecutive weeks
For purchases over \$250,000.00 FEDERAL FUNDS	Price and Cost Analysis	FORMAL BIDS (Education Code 44.031)	REQUIRED	AGENDA ITEM REQUIRED	REQUIRED * two (2) consecutive weeks

¹ Assumes the commodity code has not reached the State threshold of \$50K, otherwise quotes must be from an awarded vendor.

- Must get minimum (3) quotes for any order over \$10,000 (including co-op vendors) and submit with Quote Comparison form (located on Internal Webpage). Please contact Purchasing for assistance with quotes if needed.

REMINDERS

- **Shipping Commodity code eliminated (675-001)**. Please use the “shipping” button on requisition entry.
- For Amazon log-on information, please email Janet Bradley for invitation and instructions.
- **Catering Orders** – Please attach a meeting/training agenda to each requisition. Who/What/When/Why required for each order.
- **Daniels Office Supply reqs** – Note new bid award #.
- **Daniels Office Supply deliveries** – Legibly sign **and print** name on invoice copy. All orders have to be received in eFinance.

REMINDERS

- **Software purchases** – Use Dept. code with T (ex. 001T); Must meet software purchase requirements (completed form).
- **Demco orders:** Subtotal must be **over \$100** to place an order.
- Certain vendors have minimum purchase requirement amounts for free shipping. Check specific instructions for those vendors with these requirements (i.e. Nasco, School Specialty, etc.)
- ✓ Always check the website prior to making any purchases to verify correct vendors to use, correct bid reference, and pricing.
- **Do not print the information- it becomes outdated!**
- All charter bus and vehicle rentals must be paid with a Purchase order!
- Install fresh copy paper into copiers (for those who have been stagnant over the summer)

eFinancePlus Reminders

- Do not use the Discount Percent or Trade/Discount field to calculate the vendor discounted price. Enter the discounted unit price in Unit Price field.

Pricing					
Measure	<input type="text"/>	Extended Amount *	<input type="text" value="0.00"/>	Tax Total *	<input type="text"/>
Quantity *	<input type="text" value="0.00"/>	Discount Percent *	<input type="text" value="0.00"/>	Total Price *	<input type="text"/>
Unit Price *	<input type="text" value="0.0000"/>	Trade/Discount *	<input type="text" value="0.00"/>	Distribution Method *	<input type="text"/>
		Shipping	<input type="text" value="0.00"/>		

Note: Red arrows point to the Discount Percent and Trade/Discount fields, which are highlighted with a grey box containing the text "Do not use".

- In the description field and comment field, type the data and let the system wrap the text to the next line. Do not hit return and stack the text. When this is done, information does not print correctly on PO.

Description *
ITEM #- NSPCUSTOM WHITE MENS VAPOR LASER
JERSEY, SMALL

Correct

Description *
ITEM #- NSPCUSTOM
WHITE MENS VAPOR LASER JERSEY,
SMALL


not correct

- Do not double space in the Notes or Description fields or leave a blank space at beginning of field. It causes the entire field to print improperly.

CDW-G Requisition Entry:

- Be sure and get an official CDW-G Quote
- Enter the cooperative contract listed on the line item
- Enter the CDW item # for each item

QUOTE CONFIRMATION



DEAR LEWIS TADLOCK,

Thank you for considering CDW•G for your computing needs. The details of your quote are below. [Click here](#) to convert your quote to an order.

Enter CDW Quote # in Notes of Requisition

QUOTE #	QUOTE DATE	QUOTE REFERENCE	CUSTOMER #	GRAND TOTAL
1BVV3J2	7/19/2018	ERGOTRON FLEX TABLET ARM MOUNT	1503658	\$103.27

CDW # - Enter this first on description

QUOTE DETAILS				
ITEM	QTY	CDW#	UNIT PRICE	EXT. PRICE
Ergotron Neo-Flex Desk Mount Tablet Arm - mounting kit	1	2626240	\$103.27	\$103.27
Mfg. Part#: 45-306-101				
UNSPSC: 31162313				
Contract: Texas Synnex DIR-TSO-3866 (DIR-TSO-3866)				

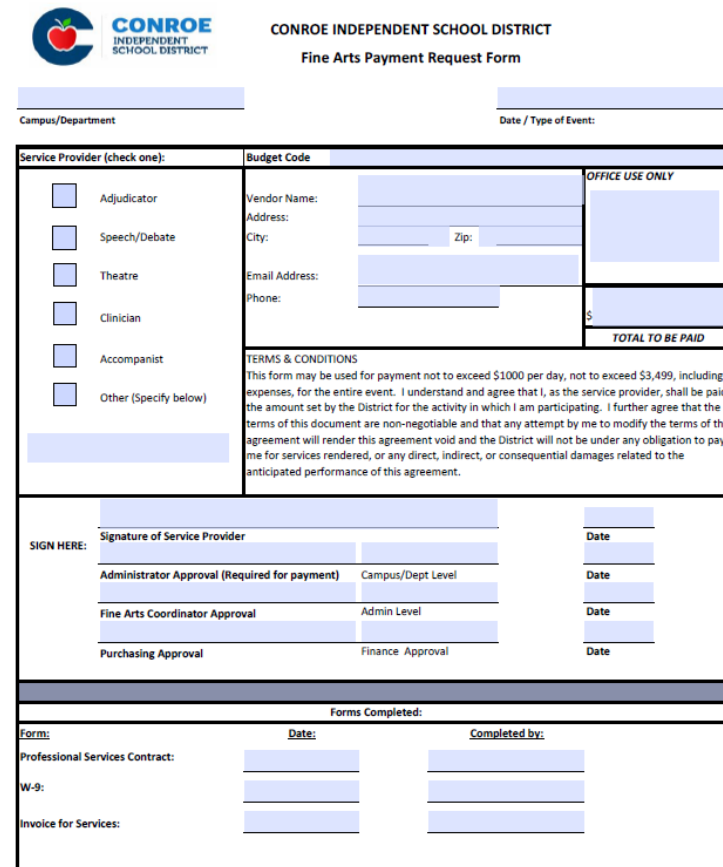
specific co-op contract listed. Enter this info in comments line of requisition

CONTRACTED SERVICES

- Awarded vendor list on the internal webpage.
- Vendors on this list are awarded for 5 years from date of Board award.
- Must complete a professional services contract each school year for each campus/dept. Can be for one event or total expected amount for the entire year.
- Supplemental Contracted Services RFP's:
 - Will be awarded quarterly (ie. Release in August, Board Award in October...Next RFP opens in November, Board Award in January, etc)
 - Focusing on professional development/SPED vendors not on a purchasing cooperative or original contracted services bid.
 - If a vendor is already awarded, they will not need to respond to the supplemental bid.
 - Not for Fine Arts consultants or Authors (contact Fine Arts Department for process and approval form).

Fine Arts Contracted Services

- Judges/Clinicians/Speech/Debate/Accompanist/Etc.
 Not previously awarded on contracted services bid
 - Complete “Fine Arts Payment Request Form” and Professional Services contract.
 - Must be approved through Fine Arts office (Dr. Horton) prior to “Request for Contract Approval” process through Legal.
 - Purchasing will approve once through the contract approval process and add vendor.



CONROE INDEPENDENT SCHOOL DISTRICT
 Fine Arts Payment Request Form

Campus/Department: _____ Date / Type of Event: _____

Service Provider (check one): <input type="checkbox"/> Adjudicator <input type="checkbox"/> Speech/Debate <input type="checkbox"/> Theatre <input type="checkbox"/> Clinician <input type="checkbox"/> Accompanist <input type="checkbox"/> Other (Specify below) _____	Budget Code _____	OFFICE USE ONLY _____ \$ _____ TOTAL TO BE PAID
	Vendor Information: Vendor Name: _____ Address: _____ City: _____ Zip: _____ Email Address: _____ Phone: _____	
TERMS & CONDITIONS This form may be used for payment not to exceed \$1000 per day, not to exceed \$3,499, including expenses, for the entire event. I understand and agree that I, as the service provider, shall be paid the amount set by the District for the activity in which I am participating. I further agree that the terms of this document are non-negotiable and that any attempt by me to modify the terms of the agreement will render this agreement void and the District will not be under any obligation to pay me for services rendered, or any direct, indirect, or consequential damages related to the anticipated performance of this agreement.		
SIGN HERE: Signature of Service Provider: _____ Date: _____ Administrator Approval (Required for payment) Campus/Dept Level: _____ Date: _____ Fine Arts Coordinator Approval Admin Level: _____ Date: _____ Purchasing Approval Finance Approval: _____ Date: _____		
Forms Completed: Form: _____ Date: _____ Completed by: _____ Professional Services Contract: _____ W-9: _____ Invoice for Services: _____		

Building Work Orders



Vendors are awarded through the District's Job Order Contract – This process must be followed or the request will be denied.

Examples include:

- Data drops, adding electrical outlets, playground equipment, etc. ***DO NOT LET YOUR PTO CONTACT VENDORS DIRECTLY***
- Contact appropriate department: Maintenance, Technology, Planning & Construction **PRIOR** to contacting any vendors.
- These departments will work to find the right contractor to provide the service needed.
- Use Facility Enhancement form through Maintenance website.

If you have questions about the process, contact Rick Reeves in Purchasing

Need training?

- Monthly training sessions available (GROUP)
- One-on-one sessions by request
- Campus/Department visit by request

Purchasing Department will send out monthly schedule with date/time/agenda.

- Contact Penny Lohr in Purchasing to sign up

Purchasing/Warehouse Contacts

Rick Reeves

DIRECTOR OF PURCHASING & WAREHOUSE |
Finance



✉ rreeves@conroeisd.net
☎ TEL: 936-709-7798

Katy LaBorde

BUYER



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☎ TEL: 936-709-7748

Ryan Titzman

ASSISTANT DIRECTOR OF PURCHASING



✉ rtitzman@conroeisd.net
☎ TEL: 936-709-7790

Penny Lohr

PURCHASING CLERK



✉ plohr@conroeisd.net
☎ TEL: 936-709-7868

Laurie Enocksen

BUYER



✉ lenocksen@conroeisd.net
☎ TEL: 936-709-7750

Kelly PottsStaubs

PURCHASING CLERK



✉ kpottsstaubs@conroeisd.net
☎ TEL: 936-709-7705

Janet Bradley

BUYER



✉ jbradley@conroeisd.net
☎ TEL: 936-709-7650

Ellie Bergeron

ADMIN SUPERVISOR/PUR WAREHOUSE



✉ ebergeron@conroeisd.net
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