



**JUNCTION ELEMENTARY SCHOOL DISTRICT
PURCHASING PROCESSES**

TO REQUEST AN ORDER FOR SUPPLIES:

1. Fill out this "Employee Purchase Request" form. INCLUDE: vendor, description of items, and estimated total.
2. IF YOU HAVE a list of more than 3 items, you may write "Please See Attached" instead of describing each item.
3. IF JEF HAS APPROVED YOUR PURCHASE- please check "yes."
4. YOU MUST ATTACH a printed cart or list from the vendor. This is extremely important for order accuracy as well as auditing purposes.
5. Sign and date your form, and turn it into the principal's box in the front office. When it has been reviewed, you will receive a copy of the request in your box.
6. Order status, as well as any questions or concerns about your order, will be communicated through email.

Employee Purchase Request

Junction Elementary School District
9087 Deschutes Rd. Palo Cedro, CA 96073

Quantity	Website/Store to be purchased from (Vendor)	Description of item/s to be purchased	Item # (if available)	Amount

PLEASE CHOOSE ONE:		SUBTOTAL	\$
<input type="checkbox"/> District Office: Please place this order for me.		TAX	\$
<input type="checkbox"/> I will make this purchase and then seek reimbursement.		SHIPPING	\$
Is this a JEF-approved grant purchase?		TOTAL	\$
<input type="checkbox"/> Yes			
<input type="checkbox"/> No			

_____ Employee Name (Print)	_____ Date
_____ Employee Signature	_____ Date
_____ Supervisor Signature	_____ Date

***If you are making this purchase yourself, you will need to fill out an additional form to receive reimbursement. Continue onto the next page for instructions on seeking reimbursement.**

TO SEEK REIMBURSEMENT:

1. First, you need to have completed an "Employee Purchase Request" form and have received it back, signed and approved. AFTER you have been approved, you may make the purchase.
2. Retain receipt and attach to this form. Completely fill out all sections. If you run out of room, you may write, "please see attached" in reference to the detailed receipt.
3. Your receipt MUST BE DATED on or after the date that the associated Employee Purchase Request was approved. If you make the purchase BEFORE the date that the administrator signs, the District Office may deny your reimbursement request.

EMPLOYEE REIMBURSEMENT REQUEST

JUNCTION ELEMENTARY SCHOOL DISTRICT
9037 Deschutes Rd. Palo Cedro, CA 96073

Instructions
 1. You must have had prior approval from an Administrator, in writing, to be reimbursed. (An email of approval with a date prior to purchase will be accepted)
 2. All receipts must show proof of payment. No packing slips.
 3. Form must be completely filled out.

Date of Purchase	Purchased From	Description of item Purchased	Amount
Total to be Reimbursed -			\$

Employee Name

Date of Request

Employee Signature

Administrator Signature

Date of Approval

***EMAIL PRE-APPROVAL FOR PURCHASES IS NO LONGER ACCEPTED.**
 Unfortunately, paperwork is too important in the Purchasing Process, and email conversations will no longer be acceptable for proof of preapproval. This is for auditing purposes.

FAQ

Q: "I need new toner for my printer. How can I get this ordered?"

A: Please fill out the "Employee Purchase Request," indicating the model of your printer and/or the details on the cartridge. Turn this in to the Principal's box in the front office and wait for approval. The District will order for you.

Q: "There are some sales going on at Walmart this weekend. Can I buy supplies for my classroom?"

A: Please fill out an "Employee Purchase Request." Indicate that you will make this purchase yourself. Complete the form, including descriptions of the supplies you are hoping to obtain, and an estimated total ("not to exceed \$XX"). Once you have submitted this form, and received the approved copy, you may make this purchase. After the purchases have been made, attach a detailed receipt to a filled out "Employee Reimbursement Request." The District will communicate with you about your reimbursement warrant.

Q: "What is my classroom account balance?"

A: The District Office will communicate about classroom balances the first week of each month. If you have concerns about this balance, please communicate with the District when updates are emailed.

****If you have any questions about purchasing, vendors, balances, etc- please do not hesitate to contact Elizabeth in the District Office at eparis@junctionesd.net.**

PURCHASING PROCESS EXAMPLES

Here is an example of a correctly completed **Employee Purchase Request** form. In this example, the requestor is asking the District Office to place the order.

Employee Purchase Request				
Junction Elementary School District 9087 Deschutes Rd. Palo Cedro, CA 96073				
Quantity	Website/Store to be purchased from (Vendor)	Description of item/s to be purchased	Item # (if available)	Amount
x 2	Office Depot	File folders	54-231	10 ea
x 1	↓	More folders	-	5.22
x 1	↓	tape	45-20	5.79

PLEASE CHOOSE ONE:

District Office: Please place this order for me.

I will make this purchase and then seek reimbursement.

Is this a JEF-approved grant purchase?

Yes

No

SUBTOTAL	\$ 31.79
TAX	\$ 3.07
SHIPPING	\$ —
TOTAL	\$ 34.86

Employee Name (Print): Emily R. Date: 8/17/18

Employee Signature: [Signature] Date: 8/17/18

Supervisor Signature: _____ Date: _____




*See other side for the example of an attachment.

Employee Purchase Request, cont.

**Office DEPOT
OfficeMax**

Shopping Cart

Your current delivery zip code **96001** Change Zip

	Pickup or Delivery	Unit Price	Qty.	Subtotal
 <p>Office Depot® Brand File Folders, 1/3 Tab Cut, Assorted Position, Letter Size, Manila, Pack Of 100 Item # 543280</p>	<p>Delivery Estimated arrival Jul 18 To 96001</p>	\$10.89 box	2	\$21.78
 <p>BIC® Round Stic Ballpoint Pens, Medium Point, 1.0 mm, Translucent Barrel, Black Ink, Pack Of 60 Item # 664011</p>	<p>Delivery Estimated arrival Jul 18 To 96001</p>	<p>\$5.00 box (Reg) \$3.00 Sale</p>	1	\$3.00
 <p>Scotch® Magic™ 812 Greener Invisible Tape, 3/4" x 900", Pack Of 10 Rolls Item # 452813</p>	<p>Delivery Estimated arrival Jul 18 To 96001</p>	\$25.99 pack	1	\$25.99

Order summary

Items (4) Subtotal \$50.77
 Delivery FREE
 Estimated Sales Tax \$3.68
 Are you tax exempt?
 Estimated Total \$54.45

Here is an example of the **Reimbursement** process, with each step correctly completed. The first step in making a purchase yourself, is to ask for approval to make the purchase & be reimbursed. To do this, you fill out an **Employee Purchase Request** form, as shown below.

Employee Purchase Request

Junction Elementary School District
9087 Deschutes Rd. Palo Cedro, CA 96073

Quantity	Website/Store to be purchased from (Vendor)	Description of item/s to be purchased	Item # (if available)	Amount
1	Amazon.com	Printer & Ink		↓

PLEASE CHOOSE ONE:

District Office: Please place this order for me.

I will make this purchase and then seek reimbursement.

Is this a JEF-approved grant purchase?

Yes

No

SUBTOTAL	\$
TAX	\$
SHIPPING	\$
TOTAL	\$

Employee Name (Print): _____ Date: 07/10/18

Employee Signature: _____ Date: 7/10/18

Supervisor Signature: _____ Date: _____

****Please note: you do NOT have approval to make your purchase, until you have received your copy of this form with a signature from the principal. Continue on to the next page for an example of the Reimbursement Request.**

Reimbursement process, cont.

To ask for reimbursement, AFTER you have received approval to make the purchase, you need to fill out an **Employee Reimbursement Request** form. Be sure to attach a copy of the detailed receipt to your form. After this has been approved, the District Office will process a reimbursement warrant and contact you through email.

EMPLOYEE REIMBURSEMENT REQUEST																													
JUNCTION ELEMENTARY SCHOOL DISTRICT 9087 Deschutes Rd. Palo Cedro, CA 96073																													
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	<div style="border: 1px solid black; padding: 5px;"> <p style="text-align: center; margin: 0;">Walmart</p> <p style="text-align: center; margin: 0; font-size: small;">Save money. Live better.</p> <p style="text-align: center; margin: 0; font-size: x-small;">1350 22L 2800 MANAGER, JOSEFINO FAC... 1515 BANK DR REDDING CA 96003</p> <p style="text-align: center; margin: 0; font-size: x-small;">ST: 02537 DP# 000112 10 27 791 04337</p> <p style="text-align: center; margin: 0; font-size: x-small;">WHITE PAPER 001983754234022 3.97</p> <p style="text-align: center; margin: 0; font-size: x-small;">12 IN RULER 001935781466298 3.99</p> <p style="text-align: center; margin: 0; font-size: x-small;">12 IN RULER 001935783466298 3.99</p> <p style="text-align: center; margin: 0; font-size: x-small;">DAY PLANNER 001267324353460 12.99</p> <p style="text-align: center; margin: 0; font-size: x-small;">10PK PENS 00186347834510 3.99</p> <p style="text-align: center; margin: 0; font-size: x-small;">DELUXE GAGAM 00244297521100 7.98</p> <p style="text-align: center; margin: 0; font-size: x-small;">SUBTOTAL 32.91</p> <p style="text-align: center; margin: 0; font-size: x-small;">TAX @ 7.25% 2.55</p> <p style="text-align: center; margin: 0; font-size: x-small;">TOTAL 35.46</p> <p style="text-align: center; margin: 0; font-size: x-small;">CASH TENDER 40.00</p> <p style="text-align: center; margin: 0; font-size: x-small;">CHANGE DUE 4.54</p> <p style="text-align: center; margin: 5px 0 0 0;"># ITEMS SOLD 6</p> <p style="text-align: center; margin: 0; font-size: x-small;">PCA 9480 6195 3463 4567 9038</p> <p style="text-align: center; margin: 0; font-size: x-small;">We gladly accept all US manufacturer's internet coupons. 07/18/18 21:22:05</p> </div>																												
	<table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <thead> <tr> <th style="width: 30%;">Date of Purchase</th> <th style="width: 30%;">Purchased From</th> <th style="width: 40%;">Description of items Purchased</th> </tr> </thead> <tbody> <tr> <td style="height: 30px;">8/1</td> <td style="height: 30px;">Walmart</td> <td style="height: 30px;">Office supplies</td> </tr> <tr> <td style="height: 30px;"></td> <td style="height: 30px;"></td> <td style="height: 30px;"></td> </tr> <tr> <td style="height: 30px;"></td> <td style="height: 30px;"></td> <td style="height: 30px;"></td> </tr> <tr> <td style="height: 30px;"></td> <td style="height: 30px;"></td> <td style="height: 30px;"></td> </tr> <tr> <td style="height: 30px;"></td> <td style="height: 30px;"></td> <td style="height: 30px;"></td> </tr> <tr> <td style="height: 30px;"></td> <td style="height: 30px;"></td> <td style="height: 30px;"></td> </tr> <tr> <td style="height: 30px;"></td> <td style="height: 30px;"></td> <td style="height: 30px;"></td> </tr> <tr> <td colspan="2" style="text-align: right; padding-right: 5px;">Total to be Reimbursed -</td> <td style="text-align: right; padding-right: 5px;">\$</td> </tr> </tbody> </table>		Date of Purchase	Purchased From	Description of items Purchased	8/1	Walmart	Office supplies																			Total to be Reimbursed -		\$
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<p>Employee Name _____</p> <p>Employee Signature _____</p>	<p>Date of Request _____</p> <p>Date of Approval _____</p>																												

MISTAKES THAT WILL SLOW THE PROCESS:

1. Forms with no attachments will not be processed.
2. Forms not completely filled out will not be processed, or, will require more communication with the requestor before processing.
3. Reimbursement requests without pre-approval will not be processed.
*Email pre-approval is no longer acceptable.
4. Reimbursement requests without receipts will not be processed.
Reimbursement requests with a receipt dated PRIOR to pre-approval will not be processed.
5. Attachments without forms will not be processed.

