

# PURCHASE REQUESTS *At-a-Glance*

September 2017

## STEP 1: Create Purchase Request Form

- Get the most current Purchase Request form from the [Administrative Services webpage](#)
- See if the vendor is currently on the [Master Agreement List](#)
- Verify that the vendor is in SAP

*Remember! ONLY the Vice President of Administrative Services can enter into an agreement for goods and/or services on behalf of the College.*

## STEP 2: Vendor Information

- Verify that the vendor accepts purchase orders
- Mark the appropriate box regarding the Master Agreement List and provide an explanation if you are **not** using a vendor from the Master Agreement List
- Enter vendor contact information

## STEP 3: Requestor's Information

- Fill out the requestor's information completely, including phone number, title, and position of requestor
- Provide the correct account coding\*

*\*Does not apply to Block Grant or Proposition 20 purchases*

## STEP 4: Product Information and Quotes

- Provide a quote(s) for the item(s)\*  
*\*Please note that you may need to provide more than one quote depending on the price of the item(s) and source of funding*
- Fill out the product information

## STEP 5: Attachments

- Attach a print out of the budget report and highlight the GL number, **verifying available funds**
- Complete the [Procurement Authorization form](#), if necessary
- Complete the [Asset Tracking form](#), when purchasing equipment
- Complete the [SFP Certification form](#), if necessary
- If there is only one vendor in the world who supplies the product, you will need to attach a Sole Source letter and attach a completed [Finding of Impracticability form](#)

## STEP 6: Approvals

- Obtain department chair and dean's initials

## STEP 7: Submission

- Submit The Purchase Request with all attachments to the Office of Academic Affairs at which time the request will be forwarded to Administrative Services for processing
- **Make a copy of the Purchase Request and all documentation for your records**

## STEP 8: Follow-Up

- Allow four weeks for processing before checking with Administrative Services
- Sign the invoice, making a copy for your records, and return to Accounts Payable in the Business Office
- Create a Work & Service Order (WSO), if needed

## STEP 1: Create the Purchase Request Form

1. ***Where can I find the Purchase Request form?***

This form is on the Administrative Services page of the LAVC website. You can download it at <http://www.lavc.edu/adminservices/forms.aspx>.

2. ***How can I verify that the vendor is in SAP?***

Either the department chair or Administrative Services can verify that the vendor is in SAP. Remember – This does not mean that the vendor is on the Master Agreement List.

3. ***Can the Purchase Request form be completed on both a mac and pc?***

Yes.

4. ***Can I pay for something out of my own pocket and get reimbursed?***

You may pay out of pocket and be reimbursed up to \$250 if you have pre-approval from the Vice President of Administrative Services. Please check the Board Unauthorized Items list (Figure 1) prior to the purchase.

After you have received approval from the VP, submit the receipt along with the Revolving Fund form. This form is on the Administrative Services page of the LAVC website at <http://www.lavc.edu/adminservices/forms.aspx>.

Please note the Revolving Fund is intended for emergency purchases only. Therefore, you cannot have multiple receipts from the same vendor over a period of time as district considers this practice “chaining” and the reimbursement will be denied.

5. ***Where do I get the account and other budget coding number?***

The department chair will supply you with the account number and other budget coding information. In the event the chair does not know the number, the chair will follow up with the supervising dean or administrative services.

6. ***Where do I get the departmental budget print out?***

The department chair will supply you with the budget print out.

## STEP 2: Vendor Information

7. ***What if the vendor does not take a purchase order?***

If the vendor does not take a purchase order, you will not be able to use them.

8. ***What is the Master Agreement vendor list and where can I find it?***

It is a list of all vendors who offer special contract pricing with LACCD. Before you select a vendor, you must see if one of the companies on the list offers the product. This form is on the Administrative Services page of the LAVC website. You can download it at:

<http://www.lavc.edu/adminservices/forms.aspx>

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9. ***Do I have to use a vendor from the list?***

If one of the vendors on the list offers the product at the lowest price, you must use them. If there is no vendor on the list who supplies the product, or if you find a company that can offer a lower price, it is possible to use them. However, you would need to indicate on the purchase order an explanation of why you are choosing an alternate vendor, provide a quote and get permission from Administrative Services to use them.

10. ***I have used a particular vendor before ordering a product for our department. Should I automatically assume that they are on the Master Agreement List?***

No. Always check the Master Agreement list since it is continually updated.

11. ***How do I get a company put on the Master Agreement list?***

You need to contact Administrative Services at (818) 947-2336 to request this vendor be added to the list. Please note, the district has to approve the request and go through a formal bidding process.

12. ***What do I do if the company I want to purchase from has never been used by the college or the district before?***

Have the vendor fill out a Create Vendor Form and W-9. These forms are on the Administrative Services page of the LAVC website. You can download them at <http://www.lavc.edu/adminservices/forms.aspx>. Both forms must show a matching name. Tell the vendor to send the forms to [ProcurementVendorMaintenance@email.laccd.edu](mailto:ProcurementVendorMaintenance@email.laccd.edu).

***Can I purchase items from an International Vendor?***

13. Yes. International vendors can be added to SAP. Please provide the vendor with the newest revised [Create Vendor Form](#). International vendors must provide a completed W-8 form, including their email address and web site, if available. This allows for communication between the District and the vendor.

14. ***Where do I find the vendor contact information?***

Call the company, check online, or get it from the vendor quote.

## STEP 3: Requestor Information

15. ***Who is the requestor?***

The person filling out and submitting the Purchase Request form is the requestor.

## STEP 4: Product Information and Quotes

16. ***How do I get a quote?***

Most vendors will provide a written quote. You can contact them via phone or email to provide you with the information.

17. ***How many quotes do I need to have?***

If the amount is under \$2,500, you only need one informal quote. An informal quote is anything

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you obtain from the company website, catalog or phone call to the vendor. If the quote is from a phone call, you need to provide documentation from a business email address, with the name of the person and the date of the call to support the pricing.

If the amount is between \$2,500 and \$4,999 an informal quote is needed from 3 different companies. An informal quote is anything you obtain from the company website, catalog, phone call, or email to the vendor. If the quote is from a phone call, you need to provide documentation from the business, showing the business email address, name of the person, the pricing information, and date of call to support the quote.

If the amount is between \$5,000 and \$88,299, you will need 3 formal quotes. Each quote must be on company letterhead.

If the purchase is over \$88,300\* this requires a formal Invitation to Bid (IFB) and must be done through the district.

*\*This amount changes yearly – please verify with Administrative Services*

Note: if the purchase is being funded by a grant, you will need to get a quote from 3 different companies, regardless of the amount.

## 18. ***What if only one company sells the product?***

If the product can only be purchased from one source, written documentation must be provided to confirm this. This justification must be on company letterhead, signed, and include the rationale as to why there are no alternative products from other suppliers comparable in performance, features, quality warranty, price and other key characteristics. The requestor must also fill out and submit a completed [Finding of Impracticability form](#).

## 19. ***How do I calculate taxes?***

The most current [Purchase Request form](#) from the Administrative Services webpage automatically calculates it for you. Double-check the amount to ensure that it is correct!

## 20. ***I am purchasing a product from out of state and they do not charge sales tax. Why does the Purchase Request form still calculate taxes for items out of state?***

Regardless of where the product or service is purchased, the district is required to collect and pay the county all sales tax.

## 21. ***How do I figure out freight and e-waste?***

This is usually indicated on the invoice or quote from the vendor. If not, please ask the vendor to provide the information.

## STEP 5: Attachments

**22. How do I get the budget report?**

The department chair has access to the budget report and can print it out. Please highlight the GL number on the report and **verify that there is funding available.**

If the item is being purchased through grant funding, you do not have to submit the budget report. The grant director will provide it.

**23. Where do I find the Procurement Authorization form?**

This form is on the [Administrative Services page](#) of the LAVC website. This form keeps us in compliance with accreditation standards.

Note: This form is not necessary for Block Grant or Prop 20 purchases.

**24. Where do I get the Finding of Impracticability form?**

This form is on the [Administrative Services page](#) of the LAVC website.

**25. When do I need to use the asset tracking form and where do I get it?**

This form needs to be submitted with the Purchase Request whenever you are buying equipment. This form is on the [Administrative Services page](#) of the LAVC website.

**26. Who needs to fill out the SFP certification form?**

If grant funds are used for any purchase, the SFP certification form needs to be filled out by the grant director or designee and attached to the request.

## STEP 6: Approvals

**27. Whose initials do I need?**

Get the department chair and dean's initials. The dean will get the VP's initials.

## STEP 7: Submissions

**28. Why do I need to copy the Purchase Request documents?**

This serves as a future resource in the event questions arise or verification is needed.

## STEP 8: Follow-up

**29. Why do I need to follow up with Administrative Services?**

Administrative Services can supply you with order status information including ordering delays or shipping information. This is very important as we get to the end of the fiscal year and items must arrive before June 30 to be accepted.

**30. How many days should I wait before following up?**

You can follow up with Administrative Services office after 4 weeks.

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**31. *Why do I need to submit a WSO?***

You will need to create a Work & Service Order (WSO) if assembly of equipment is needed, if equipment needs to be removed, if computers need to be delivered, or if software needs to be installed.

**32. *What do I do with the invoice I receive?***

In order to make sure the items are paid for, write the purchase order number on the invoice, sign and date it. Make a copy of the invoice and keep it for your records in the event there are questions or verification is needed. Send the signed, original invoice to Accounts Payable in the Business Office.

# CONTRACT REQUESTS *At-a-Glance*

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## STEP 1: Create Contract Request Form

- Get the most current Contract Request form from the [Administrative Services webpage](#)  
*\*This needs to be submitted at least **8 weeks prior** to the targeted board date.*
- Check to see if the vendor is on the Master Agreement List
- Verify that the vendor is in SAP
- Please indicate the type of action
- If there is an existing contract that is to be amended or renewed, indicate the contract number
- Indicate the type of agreement

*\*Remember! ONLY the College President or Vice President of Administrative Services can enter into procurement for goods or services on behalf of the College. Services cannot begin until approval has been confirmed by the District.*

## STEP 2: Proposal and Quotes

- Attach the proposal for the service
- Attach informal or formal quotes, depending on the contract amount

## STEP 3: Contract Information

- Enter vendor contract information

## STEP 4: Location Information

- Fill out the requestor's information
- Include the budget account coding

## STEP 5: Attachments

- Attach a print out of the budget report and highlight the GL number with verification of available funds
- Complete the [Procurement Authorization form](#), if necessary
- Complete the [Asset Tracking form](#), when leasing equipment
- Complete the [SFP Certification form](#), if necessary

## STEP 6: Justification & Approvals

- Complete justification of contract
- Obtain department chair or director's initials as well as the dean's. The dean will get the VP's approval.

## STEP 7: Submissions

- **Make a copy of the Contract Request and all documentation for your records**
- Submit the Contract Request with all attachments to the Office of Academic Affairs at which time the request will be forwarded to Administrative Services for processing

## STEP 8: Follow-Up

- **Allow eight weeks for processing and board approval before checking with Administrative Services**
- Sign the invoice, making a copy for your records, and return the original to the Accounts Payable in the Business Office.

## STEP 1: Create the Contract Request Form

1. ***When do I need to use a contract form?***

A Contract Request form is required to procure personal services, equipment maintenance, leasing of equipment, special funded grants, student intern arrangements, income agreements, and multi-year contracts.

2. ***How long can the contract be?***

Contracts shall be limited to three years for purchase of materials or supplies and five years for equipment or services, unless defined by statute. (Education Code section 81644)

3. ***Where can I find the contract request form?***

This form is on the [Administrative Services page](#) of the LAVC website.

4. ***When can I submit a contract request form?***

Since contracts need to be approved by the board, a contract request form should be submitted at least 8 weeks prior to the target board date.

5. ***Who can enter into a contract?***

Only the College President or Vice-President of Administrative Services can enter into a contract on behalf of the college.

6. ***When can the contract begin?***

No work or services can begin until the contract has been fully executed and put in place.

7. ***Who will inform me when the contract has received board approval?***

Administrative services will contact the requestor who submitted the contract request form.

8. ***Can the form be completed on both a mac and pc?***

Yes.

9. ***What is the Master Agreement vendor list and where can I find it?***

It is a list of all vendors who offer special contract pricing with LACCD. Before you select a vendor, you must see if one of the companies on the list offers the product. This form is on the [Administrative Services page](#) of the LAVC website.

10. ***Do I have to use a vendor from the list?***

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11. ***I have used a particular vendor before for a contract. Should I automatically assume that they are on the Master Agreement List?***

No. Always check the Master Agreement list since it is continually updated.



**12. How do I get a company put on the Master Agreement list?**

You need to contact Administrative Services at (818) 947-2336 to request this vendor's addition to the list. Please note, the district must approve the request and complete a formal bidding process.

**13. What do I do if the vendor I want to use for the service has never been used by the college or the district before?**

Have the vendor fill out a [Create Vendor Form and W-9](#). Both forms must show a matching name.

Request that the vendor send the forms to [procurementvendormaintenance@email.laccd.edu](mailto:procurementvendormaintenance@email.laccd.edu).

**14. Where do I get the contract number if I am renewing or amending the contract?**

The department chair should have the number. If not, contact Administrative Services.

**15. What is the definition of a short term contract?**

A Short Term Contract is for a period of less than a year and/or with a valuation of \$5000 or less.

**16. When is facilities contract needed?**

A facilities contract is required if the work that needs to be done is outside the scope of Maintenance and Operation's usual duties. For example, carpet installation or setting up art gallery displays.

## STEP 2: Proposal and Quotes

**17. How do I get a proposal?**

The vendor providing the service will supply the proposal.

**18. How do I get a quote?**

Most vendors will provide a written quote. You can contact them via phone or email to provide you with the information.

**19. How many quotes do I need to have?**

If the amount is under \$2,500, you do not need any type of quote.

If the amount is between \$2,500 and \$4,999 an informal quote is needed from 3 different companies. An informal quote is anything you obtain from the company website, catalog or phone call to the vendor. If the quote is from a phone call, you need to provide documentation from the business, showing the email address, the name of the person, the pricing information and date of the call.

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Note, if the purchase is being funded by a grant, you will need to get a quote from 3 different companies, regardless of the amount.

## 20. **What if only one company sells the product?**

If the product can only be purchased from one source, written documentation must be provided to confirm this. This justification must be on company letterhead, signed, and include the rationale as to why there are no alternative products from other suppliers comparable in performance, features, quality warranty, price and other key characteristics. The requestor must also fill out and submit a completed [Finding of Impracticability form](#).

## STEP 3: Contact Information

### 21. **What is the period of services?**

This is the time period in which you want the service to start and end. Please note that contracts for supplies are for 3 years. Contracts for services are for 5 years. If more time is needed, a renewal will be necessary at a later date.

### 22. **Where do I find the SAP vendor number?**

Administrative Services can supply this.

### 23. **Where do I find the license #/type?**

If applicable, contact the vendor for this information.

### 24. **Where do I find the billing and rate information?**

Contact the vendor.

## STEP 4: Location Information

### 25. **Who is the requestor?**

The person filling out and submitting the contract request form is the requestor.

### 26. **Where do I get the fund information?**

The department chair will supply you with the fund number and other budget coding information. In the event the department chair does not know the number, the chair will follow up with the dean or Administrative Services.

## STEP 5: Attachments

### 27. **How do I get the budget report?**

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This form is not necessary for Block Grant or Prop 20 purchases.

## 29. **When do I need to use the asset tracking form and where do I get it?**

This form needs to be submitted with the Purchase Order whenever you are leasing equipment. This form is on the [Administrative Services page](#) of the LAVC website.

## 30. **Who needs to fill out the SFP certification form?**

If the items are being grant funded, the [SFP Certification form](#) needs to be filled out by the grant director or designee.

## STEP 6: Justification and Approvals

### 31. **What needs to be included in the justification?**

Define the nature and scope of the service to be provided, and why this contract is necessary. Include the estimated cost for the total contract period. Specify exactly what is to be provided by the contractor and also exactly what is expected of the district if applicable. If needed, attach a separate sheet to allow for more information.

### 32. **Whose initials do I need?**

The department chair or director needs to initial the request. The dean and VP of Academic Affairs will also initial, followed by a signature from the VP of Administrative Services.

## STEP 7: Submission

### 33. **Why do I need to copy the Contract Request documents?**

This serves as a future resource in the event questions arise or verification is needed.

## STEP 8: Follow-up

### 34. **Why do I need to follow up with Administrative Services?**

Administrative Services can supply you with information on the status of your contract request regarding board approval and processing information.

### 35. **How long should I wait before following up?**

Allow eight weeks for processing and board approval before checking with Administrative Services.

**36. *Why do I need to submit a WSO?***

You will need to fill out a Work & Service Order (WSO) if assembly of equipment is needed, if equipment needs to be removed, if computers need to be delivered, or if software needs to be installed.

**37. *What do I do with the invoice I receive?***

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