

Polson School District Purchasing Procedures

Here is a written explanation of the Polson School District Purchasing Procedures. There are a few different ways to order supplies or request services for the District please see the following:

Option 1: Purchase Orders:

1. Please contact the Vendor and get a Price quote on the cost of goods or services (an estimate is fine). **DO NOT ORDER UNTIL YOU RECEIVE A PO #.**
2. Fill out **Requisition Order (RO)** and have the SUPERVISOR approve. See below an example of a **Requisition.** These are on our website and in every School office.

Polson School District 23		REQUISITION		
School Administration Building				
Polson MT 59860				
DATE:			Paid On CC	
			P.O.#	
SCHOOL:				
DEPT.:				
BUDGET #:				
QUANTITY	CATALOG NUMBER	DESCRIPTION: (Color, size, level, edition, etc.)	UNIT PRICE	TOTAL COST
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
		Subtotal:		\$ -
		Shipping: (enter percentage, i.e. .08)		\$ -
		Total:		\$ -
Vendor:				
Address:				
Phone:		Fax:		
Requisitioned by:		Approved by:		
<small>Treasurer/Dept. Chairman</small>		<small>Principal</small>		

3. Please give the Signed REQ to your secretary to enter into the Remote REQS portal in Black mountain software, and from there your supervisor will approve it & we will convert to a PO and place the order.
4. This helps us determine where the package is to be delivered to and helps maintain the proper chain of approval required by our auditors for GAAP and the state.

Option 2: Credit Card Purchasing: District owed Purchasing Card (BMO, P-Card)

1. If you are an employee, in which the P-card is assigned. I need a copy of **the receipt** and an approved **REQUISITION** for every purchase on the **card weekly or entered into BMS remote reqs.**

Option 3: Reimbursable Purchases: (AN OPTION WE TRY TO AVOID)

1. These are supplies bought with an employee’s personal funds. (IF SO THOSE ITEMS MUST BE CHECKED INTO THE SCHOOL BY A SECRETARY OR ADMIN -VERFIYING RECEIPT OF ITEMS.
2. Items should be approved prior to purchase by the administrator of that school. A school voucher needs to be completed and signed w/ the receipt attached.
3. Please see an example of a Voucher found on website and in school Office.

VOUCHER		POLSON PUBLIC SCHOOLS			
		SCHOOL DISTRICT #23 LAKE COUNTY			
		11 4TH AVE EAST - POLSON, MONTANA 59860			
DATE					
	PAYEE				
	MAIL ADDRESS				
	PO BOX OR STREET NUMBER				
CITY	STATE	ZIP CODE			
Purchase Order #	Firm's Invoice #	Quantity	Articles or Services	Unit Price \$\$	Amount \$
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
				Total Due:	\$ -
The undersigned declares that the items mentioned in the foregoing account were furnished as therein stated, and that the amount therein claimed is correct, just, due, and wholly unpaid.					
	Payee			BY	

4. These items should only be local merchants and no online orders.

Travel Form for all Travel Approval

5. Mileage and Per Diem needs to be entered into the Travel form (in excel) prior to the actual conference or reason for travel printed and approved by SUPERVISOR & SUPERINTENDENT. Credits of completion must be attached to Travel Form, in order to be reimbursed. Please see an example of Travel form below.

Polson School District #2 Professional leave / Travel Authorization Form							Date: _____			
Event Name, Location and Date: _____										
Reason for Travel: _____										
Driver's Name: _____		LODGING		MEALS			Miscellaneous			
TRAVELER'S NAME (List All)	# of Nights	Lodging Cost Request	# of Breakfasts	# of Lunches	# of Dinners	Total Meal Reimb	Registration Fees: District Paid	Registration Fees: Employee Paid	Sub Costs (\$80.00/)	
		Pcard	\$6.00	\$7.50	\$14.50		____ YES, _____ PO#	____ Yes	____ Yes	
						\$0.00				
						\$0.00				
						\$0.00				
						\$0.00				
						\$0.00				
						\$0.00				
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						\$0.00				
						\$0.00				
						\$0.00				
						\$0.00				
						\$0.00				
						\$0.00				
Meals	0	\$0.00	0	0	0	\$0.00	0.00	\$0.00	\$0.00	
MILEAGE:										
1. Points of Travel (list round trip, e.g., Mi	Polson-MSLA-Polson						Personal Vehicle			
2. Number of vehicles	1						District Vehicle			
3. Number of Miles Traveled,	0						Vehicle			
4. State mileage rate (per mile)	\$0.580									
5. Total Reimb. for Mileage at State Rate (l	\$0.00									
OTHER COSTS										
									Amount	
									\$0.00	
									\$0.00	
									\$0.00	
									\$0.00	
TOTAL Cost										
Lodging	\$0.00						Expenditure Budget Code			
Meals	\$0.00						Charge To:			
Mileage	\$0.00						Fund Description:			
Other	\$0.00									
Sub Costs	\$0.00									
TOTAL	\$0.00									
Principal / Director	Date	Superintendent	Date							

Polson School District Website: <https://www.polson.k12.mt.us/staff/staff-resources/district-forms>

STAFF RESOURCES

- [2022-2023 Employee Handbook](#)
- [Complaint Procedures Handbook](#)
- [Classified Staff Professional Development](#)
- [Health and Wellness](#)
- [Mental Health and Wellbeing](#)
- [MT Office of Public Instruction](#)
- [PCEA CBA Master Agreement](#)
- [PEA CBA Master Agreement](#)
- [PPAS Information](#)
- [Professional Development Program](#)
- [Professional Learning Communities](#)

School District 23 Forms

Employees:

Please read the instructions below for the districts purchasing procedures, reimbursement forms, and travel approval and procedures.

Instructions

Purchasing Procedures

Forms

- [School District Voucher \(.xlsx\)](#)
- [School District Requisition \(.xlsx\)](#)
- [In State Travel Form \(.xlsx\)](#)
- [Out of State Travel Form \(.xlsx\)](#)
- [Vehicle Request Form \(.pdf\)](#)
- [First Injury Report \(.doc\)](#)

Please if any of this is confusing please feel free to give me call.

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406-883-6345 Fax