

## **STANDARD OPERATING PROCEDURES For Purchases up to \$50,000**

1. Program office must contact Grants Management and/or Budget for available funds.
2. Program office shall visit the Procurement webpage for Purchasing to obtain the appropriate forms and procedures.
  - ✓ Request for Services or Goods Form
  - ✓ Purchase Order Change Form (Form updated)
  - ✓ Return of Goods Form
  - ✓ Purchase Order Procedures

### **State Procurement Card Program**

- ✓ State Procurement Card Log
- ✓ State Procurement Card Cardholder Agreement
- ✓ State Procurement Card Food Purchases Form
- ✓ State Procurement Card Missing Documentation Affidavit
- ✓ VISA Purchasing Card Dispute Form
- ✓ DFA State Procurement Card Guidelines
- ✓ MDE Procurement Card Program Guidelines
- ✓ Procurement Card Services

### **Shopping Cart**

- ✓ Shopping Cart Routing Form
- ✓ Shopping Cart Instructions
- ✓ Edit a Shopping Cart

### **Food and Space Request for Business Meetings**

- ✓ Request to Purchase Food and/or Space for Business Meetings  
Form used for food purchases for business meetings
- ✓ GUIDE - Request to Purchase Food and/or Space for Business Meeting
- ✓ Quote Form
- ✓ Quote GUIDE

### **State Purchasing Law/Guide**

- ✓ Procurement Manual
- ✓ Purchasing Law Update

3. Program office shall complete Request for Services or Goods Form/Shopping Cart.
  - ✓ Requestor and Bureau Director or above approves the purchase request.
4. Program office shall review the Request for Services or Goods/Shopping Cart for completion.

**Request for Services or Goods Form**

- ✓ Vendor is a registered supplier in the MS Accountability System for Government Information and Collaboration (MAGIC)
- ✓ Supplier number affixed on requisition
- ✓ Vendor information align in MAGIC
- ✓ Verify all internet order amounts
- ✓ Product numbers, pricing and est. shipping verified by vendor
- ✓ Requestor and authorized signatures are not the same person
- ✓ Date and phone number provided
- ✓ Supporting documentation align with request
- ✓ Quantity, unit, description, totals align
- ✓ Budget codes accurate
- ✓ Funds approved by accounting contact
- ✓ Technology related items reviewed by OTSS
- ✓ Purchase Order number provided for modification
- ✓ Quotes attached mirror for each vendor
- ✓ W-9 attached for new vendors

**Shopping Cart**

- ✓ Complete a Shopping Cart Routing Form
  - ✓ Submit to the Office of Procurement
  - ✓ OTSS/DFA assigns Shopping Cart user roles
  - ✓ Visit the Procurement webpage for Purchasing to review Shopping Cart instructions
5. Program office shall provide applicable quotes for each request.
    - ✓ < \$5,000 – one quote
    - ✓ > \$5,000 – two quotes
    - ✓ > \$50,000 – Invitation for Bid
  6. Program office shall ensure adequate budget authority to make purchases.
  7. Program office shall ensure equipment purchases are budgeted appropriately.
  8. Program office shall provide quotes for all purchases that are comparable and accurate.

9. Program office shall submit a complete purchasing packet to the Office of Procurement to request a purchase order.
10. Purchasing Analyst shall review packet for compliance.
11. Purchasing Analyst shall email a Information Request Checklist to the program office for revisions, if needed.
12. Upon receipt of revisions from the program office, the Purchasing Analyst shall review requested revisions and process request in MAGIC for a purchase order.
13. Purchase Analyst forwards purchase request to the Procurement Director to order purchase in MAGIC.
14. Procurement Director shall email the approved purchase order to the program office, vendor, and Accounts Payable.
15. Program office shall verify order upon receipt.
16. Report any discrepancies to the Office of Procurement immediately.

### **Technology Purchases Only**

17. Program office shall require OTSS approval for all technology related items.
  - ✓ Program offices shall send an email to [mdenet@mdek12.org](mailto:mdenet@mdek12.org) with the subject line “**Technology purchase approval request**”.
  - ✓ Program office shall attach the blue and white technology purchase request form (signed by your Office Bureau Director) to [mdenet@mdek12.org](mailto:mdenet@mdek12.org).
  - ✓ The form can be downloaded from the OTSS web page.
  - ✓ Program office shall follow OTSS’ guidelines for technology purchases.
  - ✓ OTSS shall sign-off on the Technology Purchase Request Form and include a technology plan, if applicable.
  - ✓ Program office shall ensure adequate budget authority to make purchases.
  - ✓ Program office shall forward the approved packet and Technology Purchase Request Form to the Office of Procurement.
  - ✓ For quotes **which do not have a signed agreement**, the program office will submit the above documentation to Procurement inbox for **Purchasing** to generate a purchase order.
  - ✓ For quotes that include a **signed technology agreement**, the program office will submit the above documentation to the Office of

Procurement with a *Technology Justification Form* found on the Procurement Contract's webpage under Independent Contract Checklist and Forms.

- ✓ Submit the technology packet to the Procurement inbox for **Contracts**.
- ✓ For timely processing, please pay close attention to the appropriate Procurement **inbox** submissions.

#### ITS Acquisitions

- ✓ Program office shall submit a requisition and a copy of the CP-1 to the Office of Procurement Purchasing Inbox for a purchase order PRIOR to technology services beginning.