



SLPS VENDOR PURCHASING PROCESS

Procurement Office
02/17/2023



AGENDA

- Budget Availability
- Vendor Set-up
- Obtain Vendor Quotes
- Contracts/Service Agreements
- Entering Service Requisitions
- Entering “Goods” Requisitions
- Requisition Approval
- Purchase Orders
- Receipt of Goods or Services
- Invoice Payments
- Procurement Requirements
- Questions?



THE PROCUREMENT OFFICE

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[Buyer Assignments by Location](#)



BUSINESSPLUS

- BusinessPLUS is the official financial system of the District. The system is used to track all budgetary and financial information. All purchasing transaction must be entered into BusinessPLUS.
- Circumventing the purchase order process directly violates the district's purchasing policy. District funds cannot be obligated without an approved purchase order or contract issued by the Director of Procurement and/or representatives within the Procurement Department.





BUDGET AVAILABILITY

- 1.** Review the GL5000 Budget to Actual Report in BusinessPLUS to **confirm budget availability.**
- 2.** Identify the funding source (GOB, ESSER I, II or III, etc.) for the desired items or services.
- 3.** To confirm grant/GOB compliance, contact the Financial Management Office (FMO):
 - a. Confirm compliance and spending eligibility **with your assigned Financial Analyst**
 - b. Confirm the items or service purchases are “allowable” per the funding guidelines.



VENDOR SET-UP

4. Contact the Procurement Team to confirm vendor status.
5. Non-active vendors must complete the vendor registration packet which includes:
 - a. Vendor Registration form
 - b. W-9
 - c. Secretary of State “Certificate of Good Standing”
 - d. Federal “Sam.gov” registration: www.sam.gov
6. Determine the vendor “category,” then perform the required next steps.



VENDOR SET-UP

7. District vendors fall into one of three (3) categories:
 - A. **Preferred RFP vendor** – Vendors who have responded to an RFP, or a related process, and are typically already in SLPS system.
 - B. **COOP Vendors** - Cooperative Purchasing Organization vendors that offer pre-bid goods and services:
 - A. Contact Christy Scales, Christy.Scales@slps.org, for CO-OP details/information. e.g., Contract #
 - B. Request **COOP pricing** and provide the Contract # to the vendor
 - C. **SLPS “NON-RFP” Vendor** - Vendor that has been approved by SLPS Procurement office but **does not** have a formal agreement; refer to “SLPS FY 2022-23 PROCUREMENT REQUIREMENTS for purchase transaction **limitations**.”



OBTAIN VENDOR QUOTES

8. Once the vendor category is determined, review the document titled **“SLPS FY2022-23 Procurement Requirements”** to determine required actions.
9. Once the quote has been obtained for the type of purchase being requested:
 - a. Enter the details of this quote as a “requisition” in BusinessPlus.
 - b. Attach the quote(s) to the “requisition” in BusinessPlus.
 - c. In BusinessPLUS follow the below steps to attach quotes/document:
 - I. On the left-hand side of the window panel, click “attachements”
 - II. Click “add attachment”
 - III. The below window will appear:

A screenshot of a software window for attaching documents. It features three main input fields: "Attach ID:" with a dropdown menu showing "Contract" (highlighted), "Purchase Request External", and "Purchase Request Internal"; "Description:" with a text input field; and "Attachment:" with a text input field and a "Browse..." button. At the bottom, there are "Attach" and "Cancel" buttons.

Attach ID:
Description:
Attachment:



OBTAIN VENDOR QUOTES

Continued- Steps to attach quotes/documents:

- IV. Select “Purchase Request Internal” in the “Attach ID” window.
- V. Enter the title/name of the document in the “Description” window.
- VI. Confirm the title/name of the document appears in the “Attachment” window.
- VII. Click “Attach” to enable the document to be viewed by Procurement.

National Office Supply USA 3300 Howard Street San Francisco, CA 94103 USA		Purchase Quote	
Telephone: 415-333-1000		Purchase Quote No.	500041
		Vendor No.	AFF1
Order From		Ship To	
Aero Furniture Factory, Inc. 6200 Lincoln Avenue Building A Santa Rosa, CA 25286 USA		National Office Supply USA 3300 Howard Street San Francisco, CA 94103 USA	
Contact: Bill Teller Telephone: 707-456-3130 Fax: 707-456-3138		Telephone: 415-333-1000	



CONTRACTS – FOR SERVICES

10. All executed vendor contracts & service agreements **MUST** be forwarded to Procurement.

- a. Vendor contracts using SLPS' Contract Templates are processed immediately.
- b. Any changes made by the vendor to SLPS' Contract Templates:
 - i. Must highlight or “track changes” within the document being presented.
 - ii. Must be forwarded to Legal for review **before** SLPS signatures are obtained.

Detailed Contract Process can be found on the Procurement website: [Contract Process](#)

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ENTERING “SERVICE” REQUISITION

- 11.** Before a contract requisition will be approved in BusinessPLUS:
 - a. The Requestor should have secured the vendor signature on the contract/agreement
 - b. The Procurement Team will obtain the CFO/Superintendents’ contract signatures
 - c. Legal must review/approve contracts/agreements that are not SLPS’s Contract Template

BusinessPLUS Transaction	Module	Explanation
CMUPCM – Create contracts and Amendments	Contract Management	Used to enter requisitions that have a contract



ENTERING “GOOD” REQUISITION

12. Goods and related supplies must be entered into BusinessPLUS:

BusinessPLUS Transaction	Module	Explanation	GR needed?
POUPPR Enter Purchase Requisitions	General Purchase Requisition	Used when creating general requisitions for supplies, technology purchases, furniture, computers, etc.	Good Receipt Required
POUPPR Enter Purchase Requisitions	Blanket Purchase Requisition	Used when creating requisitions that require multi- lists such as, library books, maintenance and custodial supplies, textbooks and services that aren't contract related.	“Ok to pay” Approval



REQUISITION APPROVAL

- 13.** The requisition must be approved in BusinessPlus by:
 - a. Requisition Creator
 - b. The Department Head/Network/Deputy (if greater than **\$5000**)
 - c. The Finance Management Office (allow 24-48 hours, if correct)
 - d. The Accounting Office (allow 24-48 hours, if correct)
 - e. Procurement (allow 24-48 hours, if correct)
- 14.** This approval process, ending with Procurement, can take roughly 5 to 10 days.
- 15.** After the requisition has been approved:
 - a. Funds have been encumbered in BusinessPLUS.
 - b. The anticipated purchase has been approved.
 - c. A purchase order (P.O.) has been created.



PURCHASE ORDERS

16. After a P.O. # has been generated, the requestor may proceed with the purchase:

- a. The Procurement Office will send the purchase order (P.O.) to the vendor.
- b. An email will be sent informing the Requestor the P.O. has been approved/created.
- c. The vendor must send invoices to the address shown on the P.O.
- d. The vendor must include the P.O. number on all subsequent invoices.

17. After the order has been placed, and goods are enroute or services are being rendered, pay strict attention to the delivery date and/or the completion status of your order.



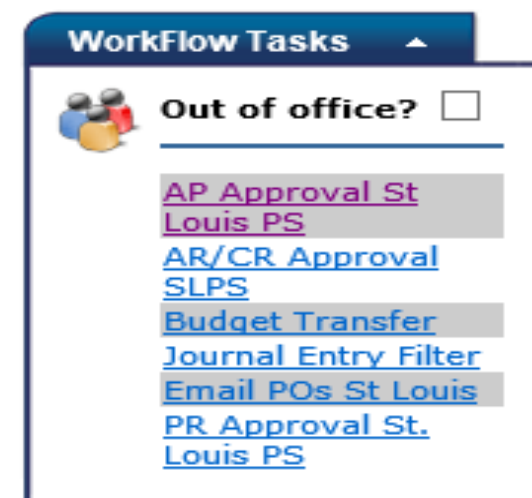
RECEIPT OF GOODS OR SERVICES

18. Upon receipt of goods or after completion of services rendered, the Requestor **MUST**:

- Enter the details in the “Goods Receipt” screen in BusinessPLUS for tangible goods, OR
- Enter “ok to pay” in the “AP Approval St. Louis PS” screen on the home tab in BusinessPLUS for services rendered.

Purchase Requisitions, Orders and Receiving ▲

- [Enter Purchase Requisition - POUPPR](#)
- [Goods Receipt - Receive on Purchase - POUPRC](#)
- [PunchOut Web Shopping - POUPPP](#)



19. If invoices, packing slips or other delivery notifications are received by your department, please forward to Accounts Payable:

AccountsPayable@slps.org



INVOICE PAYMENTS

- 20.** Accounts Payable is responsible for the timely payment of all invoices after comparison, confirmation, and receipt of the following:
- A valid Purchase Order
 - An invoice containing a valid purchase order number.
 - “Goods Receipt” entered in BusinessPLUS ← for tangible goods.
 - “Okay to pay” entered in BusinessPLUS ← for contractual services or agreements.
- 21.** Ideally, vendor payments should be disbursed within 30-45 days of invoice receipt. However, payments may be significantly delayed if the appropriate details and information have not been provided to Accounts Payable in a timely manner.

ALL INVOICES MUST BE FORWARDED TO
Accounts Payable: AccountsPayable@slps.org



SUPPLIES AND RELATED ITEMS

SUPPLIES AND RELATED ITEMS

PREFERRED RFP VENDOR

Annual Vendor Spend	Quotes Needed	RFP Needed	Board Resolution Needed	Output/Signature
Up to \$3,000.00	1 Quote	No	No	Purchase Order
\$3,001.00 - \$5,000.00	1 Quote	No	No	Purchase Order
\$5,000.01 & Over	1 Quote	No	No	Superintendent

CO-OP VENDOR

Annual Vendor Spend	Quotes Needed	RFP Needed	Board Resolution Needed	Output/Signature
Up to \$3,000.00	1 Quote	No	No	Purchase Order
\$3,001.00 - \$5,000.00	1 Quote	No	No	Purchase Order
\$5,000.01 & Over	1 Quote	No	Yes, for District Information purposes only	Superintendent

SLPS "NON-RFP" VENDOR

Annual Vendor Spend	Quotes Needed	RFP Needed	Board Resolution Needed	Output/Signature
Up to \$3,000.00	1 Quote	No	No	Purchase Order
\$3,001.00 - \$5,000.00	3 Quotes (1 selected vendor + 2 additional quotes)	No	No	Purchase Order
\$5,000.01 & Over	RFP/Sealed Bid Process*	Yes	Yes, Board Approval Required	Superintendent



CONTRACTS, AGREEMENTS, PD

CONTRACTS, SERVICE AGREEMENTS, PROFESSIONAL DEVELOPMENT

PREFERRED RFP VENDOR				
Annual Vendor Spend	Quotes Needed	RFP Needed	Board Resolution Needed	Output/Signature
Up to \$3,000.00	1 Quote	No	No	CFO
\$3,001.00 - \$4,999.99	1 Quote	No	No	CFO
\$5,000.00 - \$49,999.99	1 Quote	No	No	Superintendent
\$50,000.00 & over	1 Quote	No	No	Superintendent
CO-OP VENDOR				
Annual Vendor Spend	Quotes Needed	RFP Needed	Board Resolution Needed	Output/Signature
Up to \$3,000.00	1 Quote	No	No	CFO
\$3,001.00 - \$4,999.99	1 Quote	No	No	CFO
\$5,000.00 - \$49,999.99	1 Quote	No	No	Superintendent
\$50,000.00 & over	1 Quote	No	Yes, District Information purposes	Superintendent
SLPS "NON-RFP" VENDOR				
Annual Vendor Spend	Quotes Needed	RFP Needed	Board Resolution Needed	Output/Signature
Up to \$3,000.00	1 Quote	No	No	CFO
\$3,001.00 - \$4,999.99	3 Quotes (1 selected vendor + 2 additional quotes)	No	No	CFO
\$5,000.00 - \$49,999.99	3 Quotes (1 selected vendor + 2 additional quotes)	No	No	Superintendent
\$50,000.00 & over	RFP/Sealed Bid Process*	Yes	Yes, Board Approval Required	Superintendent



QUESTIONS?