

**PURCHASING PROCEDURES
FOR
CAPITALIZED ITEMS OVER \$750.00 IN VALUE**

**OBJECT CODES: 621, 641, 643, 645, 647, 651, 652,
654, AND 691**

REQUISITION / FIXED ASSET FORM

- All single items having a purchase value of \$750.00 or greater per item must be capitalized and receive a property records number and tag. Furniture purchases must first be approved in writing by Mark Carver, Director of Facilities. Most furniture purchases will originate from the Facilities Department. Technology purchases of ANY kind must be approved in writing by Josh Williams, Director of Technology prior to submission of a purchase order requisition. The purchase order requisition (screen 13A) must contain the following: “Approval obtained from (Facilities Dept for furniture) (Technology Dept for technology)”, the name of approver and date approval was obtained. All technology equipment must be shipped to the Technology Department at the following address:
 - SCSB, Attn: Technology Department, 1729 SW Walker Avenue, Live Oak, Florida 32064. This can be accomplished by entering “9025” in the “ship to” field on screen 13 of the purchase order requisition in the TERMS system.

The order will be delivered to the correct site by technology personnel.

A School Board approved property acquisition/fixed asset form must be provided to the Finance Department by the purchase order originator before entering the requisition into the system. Absence of this form will result in holding of purchase order until the form is received in Finance.

A copy of the approved purchase order and fixed asset form will be sent from the Finance Department to the property records clerk at the Facilities Department. Upon complete receipt of order, all packing slips, quotes, completed fixed asset form and all other pertinent paperwork must be attached to the green copy of the purchase order and sent to the Finance Department for payment. After payment is made, a copy of the complete voucher packet will be sent to the property records clerk at the Facilities Department.

TECHNOLOGY PURCHASES:

- **Technology Personnel Will:** Technology personnel will receive the shipment and verify its accuracy based on the paperwork provided to them from the purchase order originator and thru the Facilities Department. Once verified and received, Technology will alert the Facilities Department that the asset purchased on certain purchase order number (this number will be taken from the fixed asset form) is ready to be tagged. The property record clerk will tag the asset and the Technology Department will assume responsibility of delivering the asset to the school. The Technology Department will remain responsible for the asset(s) until such time as the asset(s) is delivered to the school.
- **Assuming Responsibility of the Asset:** Once the item has arrived, has been tagged and configured, it will be delivered to the assigned school or department. It is the responsibility of the technology representative to complete a Disposition Form, meet with the facility property record custodian and acquire the signature that will allow the Facilities Department, Property Record Clerk, to assign responsibility to the correct cost center. The signed Disposition Form must be returned to the Facilities Department, Property Record Clerk, so that the ownership may be amended from the Technology Department to the correct cost center.

WHEN THE ITEM ARRIVES AT YOUR FACILITY: Phone the Property Record Custodian to notify that the item has been *checked in* and the *purchase is accurate*, complete, and ready for an asset tag number to be affixed. Write the date (on the Fixed Asset Purchase Form) that you phoned the Facilities Department and notified them that the asset is ready to be tagged. At this time, Facilities, **with assistance of the site's Property Records Custodian,** will affix Property record numbers and record the following information:

- Model number
- Serial number
- Building and room number asset to be assigned to

The site's Property Record Custodian will sign the Fixed Asset Form as receiver of the item. It will then be the responsibility of the sites' Property Records Custodian to deliver the asset to appropriate building and room number.

Each site should have a procedure in place to get a signature from the employee accepting responsibility of the delivered equipment or items.

TO MOVE PROPERTY IN YOUR SCHOOL OR TO ANOTHER SITE

You must complete a Property Disposition Form for property to be moved, traded in, to surplus, or if it has been stolen and you desire to have property removed from your record.

To have property transferred within your school or to another site, a disposition form must be completed and should include the following information:

- Item Description
- Property record number
- Serial number
- Condition (good, fair, poor)
- “Requested Disposition” as Transferred
- Transfer Location (**must have building and room number**)

If you are transferring property to a different **site** the Disposition Form must be signed by the administrator that has **released** the property and the administrator that **receives** the property. Do not send property without getting the *received* signature. The Disposition form is then sent to Facilities Department for the Property Records to be updated.

TO SURPLUS PROPERTY

To have property surplused and removed from your inventory, a disposition form must be completed with the “Requested Disposition” to show as Surplus. Your disposition form may include items with or without a property record number. All items that have a property record number require Board approval before it can be surplused. A compiled list is sent for board approval each month.

STOLEN PROPERTY

Complete the Disposition Form with the “Requested Disposition” as Stolen and attach a police report.

TRADED-IN PROPERTY

Complete the Disposition Form with property record number, description and “Requested Disposition” of Trade-in. You must attach a copy of an invoice with trade-in value listed.

After Board approval, a pick-up list is generated of all the items listed on a disposition form. It is the responsibility of the **Property Records Custodian** at each site to have these items **located, identified by property record number and available for pick-up.**

- **SOFTWARE:** All capitalized software must be kept up with. Keep all discs, agreement papers or contracts in an envelope with Property Record number affixed to the outside. When software is no longer used fill out a Disposition form for Surplus. Facilities will pick up envelope and a document will be signed by property records custodian stating it was destroyed once Board approval for surplus has been approved.