

CHECK LIST FOR PREPARING TO GET A PURCHASE ORDER

- Discuss at club meeting what services/items are being purchased.
- Decide in the minutes exactly what is being bought, where it is being purchased, estimated price/or quote, and if there is shipping and tax to be added (**Note: All items ordered out of state will accrue State Tax when invoice is paid.**) (vote)
- Check account balance to make sure there is enough money for the expenditure. The exception to this is a fundraiser where we will allow the account to go into deficit.
- Complete Student Activities requisition (use Student Activities Travel requisition for trips) with signature of Sponsor and one club member. Attach a copy of the minutes to the requisition.
- Send it to Student Council to be voted on and approved with signatures.
- Next get Principal/Asst Principal's signature.
- Give requisition to Student Activities Secretary (or the Bookstore Person depending on what is appropriate at your school) to put requisition on OBARS or to send to Student Activities for wanting a cash envelope or donation check. Be sure to write on the requisition where you want a copy of the purchase order sent to (e.g. Send PO to school only, send to school and vendor, Fax PO to vendor at fax#.)
- WAIT** until you get a purchase order number at this point before ordering items or contracting a service. **This includes fundraising merchandise.**
- Once you have the purchase order, you may buy (order) the merchandise or services!
- If using an Open PO, a ledger sheet needs to be filled out to keep track of expenditures. (Ledger sheets can be obtained from the Student Activities Website under forms.) Keeping a ledger will let you know exactly how much money you have left on your PO. You should never spend more than what is on the PO. If an increase is needed for the PO, the Secretary needs to have the appropriate paperwork. (A new paper requisition will be needed with new minutes approving the increase with the appropriate signatures.) **Do not spend the money until the increase is on the PO.** You will have to check with the Secretary in a day or two to see if the increase has been completed. (So plan ahead!)

*** At any point this process may be stopped if the appropriate approval isn't obtained.**