



Lifecycle of a Purchase Request (PR), Purchase Order (PO), and Invoice Payment

The below process demonstrates the lifecycle of the purchasing process from beginning to end. If you have questions about the processes or requirements, please see the below contacts for assistance.

- Purchasing 775-850-8025, purchasing@washoeschools.net
- Accounts Payable 775-348-0311, ap@washoeschools.net
- Grants Department 775-348-0277, grants@washoeschools.net
- Business Process Trainer 775-789-3438, klcase@washoeschools.net

Preparation is key to any successful purchase, whether it is for services or products. The suggested minimum amount of lead time would be starting this process three (3) months in advance of needing the services or products. The lead times will be longer if the purchase is Grant funded.

Quotes may be needed for your purchase. See the below information from the Purchasing Department.

- Informal Quotes are from \$10,000 up to \$49,999
 - The site can obtain three quotes or can reach out to Purchasing for help. If they attach all three to the PR, the assigned Buyer will review, log and approve the PR accordingly. Site users can email the quotes to Purchasing for assessment prior to entering if that is easier.
- Formal Quotes are \$50,000 up to \$99,999
 - Purchasing will facilitate this process. Contact them in advance. (775-850-8025)
 - Requires CFO approval for award.
- Bids are at \$100,000 and above
 - Purchasing will facilitate this process. Contact them in advance. (775-850-8025)
 - Requires Board approval for award.

If your purchase is for services, you will need an Independent Contract Agreement (ICA). Please visit the Accounts Payable (AP) ICA web page here: <https://www.washoeschools.net/Page/6111>.

If the vendor has their own contract, or any document that contains terms and conditions, the contract or document will need to go through the Document Review process managed by the Purchasing Department. You can access their forms here:

<https://wcsdpolicy.net/search.php?search=AF%203326&rd=TRUE>

<https://wcsdpolicy.net/search.php?search=AF%203327&rd=TRUE>

You can see there are many moving parts to the purchasing process. Again, preparation is key!

Once you have all your preparation done (quotes, ICA paperwork, document review, if needed), then you are ready to enter your PR into BusinessPLUS.

- Step 1, enter a PR. The PR, or purchase request, has all the information needed to place the order with the vendor, but it also allows for oversight and organization approvals through workflow.
 - Attach any supplemental documents to the PR as needed, such as quotes, ICA paperwork, or document review forms.
- Step 2, the PR has completed the workflow approvals and is assigned a PO number. When the PO is in place, it will be sent to the vendor, indicating they are authorized to start services or process the order for products. No services may be provided, or products shipped until a PO has been issued.
- Step 3, the services are performed, or products are delivered to the site.
- Step 4, the vendor invoices WCSD for services or products.
- Step 5, the site must receive on the PO in BusinessPLUS. Receiving gives the authority to pay.
 - For invoices exceeding \$10,000, the manager/supervisor or other person responsible for managing the contract or order should verify the information on the invoice received. This includes:
 - Verifying the work was completed, or confirming that all items on the invoice have been received,
 - Verifying that the billing is in accordance with the contract,
 - Once verified, the manager must indicate their approval on the invoice by writing “ok to pay”, then print name, title, sign, and date the note.
 - If the vendor sent the invoice to your site directly, please email the invoice with the manager’s approval to Accounts Payable, ap@washoeschools.net
- Step 6, AP will review the receiving information in BusinessPLUS, then process the invoice and remit payment to the vendor.

Users can find step-by-step job aids and videos for PR entry and PO receiving in the Ordering Team, managed by the Business Process Trainer. If you are not a member of the Team, please contact the Business Process Trainer for access, 775-789-3438 or klcase@washoeschools.net

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Check out the life cycle graphic below.



