

## Requesting and Completing Purchase Orders

Task	Person Responsible	Date to be Completed
1) Compose an email. In the Subject line of your email include: <ul style="list-style-type: none"> <li>• PO Request</li> <li>• Vendor</li> <li>• Amount</li> <li>• What is being purchased</li> </ul> <b>Example: Subject: PO Request – Quill - \$300 - office supplies</b> In the event of emergency call HREC for immediate approval and PO number.	Requesting Staff	As Needed
2) If more description is needed, type it into the body of the message. Do not make it lengthy. If more information is needed, you will be contacted.	Requesting Staff	As Needed
3) Email request to the Operations Manager.	Requesting Staff	As Needed
4) The Operations Manager will ensure that costs are reasonable, allowable, and that funds are available in the appropriate line item before forwarding the request to the Director.	OM	Upon Receipt
5) The Director will approve or deny the request and forward it to the Executive Director, Director of Finance, Bookkeeper, Operations Manager and person making the request.	Director	Upon Approval
6) The Hill will process the request and send the purchase order to Central Office.	Bookkeeper	Upon Receipt
7) The front desk will date stamp the purchase order and distribute.	ITC or DEC	Upon Receipt
8) Place your order or make your purchase (remember...purchases are not to be made until you have the PO in-hand)	Requesting Staff	Upon Receipt of Purchase Order
9) Complete, sign, and date the purchase order and attach the invoice, receipt, etc. If the PO includes In Kind, ensure it is highlighted.	Purchasing Staff	Within three days of purchase/ receipt of invoice
10) Place the completed PO in the Director’s mailbox.	Purchasing Staff	Upon Completion
11) Director initials the PO	Director	Upon Receipt
12) PO is sent to the Hill for payment	Director	Upon Receipt
13) Originals are sent back to Central Office once paid.	Bookkeeper	Once Paid
14) File originals, by number in specified binder.	ITC or DEC	Upon Receipt