FOOTHILL-DE ANZA
COMMUNITY COLLEGE DISTRICT

PURCHASING WORKFLOW FOR GOODS AND SERVICES

Helpful Links:

- Purchasing and Payment Approval Matrix
- Purchasing Documents Matrix for Goods and Services
- Contracts & Forms
- Bid Threshold
- Purchasing Requisition Manual
- Direct Pay Request Form
- Purchasing website

START

VENDOR FOR GOODS OR SERVICES IDENTIFIED

COMPETITIVE BIDDING REVIEW

- If the total contract value exceeds the applicable bid threshold, a competitive solicitation may be required. - Contact Purchasing for assistance.
- Specific Goods over $20k require at least 3 documented quotes.

SERVICES
OR GOODS WITH SERVICES COMPONENT

GOODS

CONTRACT PREPARATION

- Complete the appropriate District contract template.
- Ensure the agreement is fully executed.
- Review the **Purchasing and Payment Approval Matrix** for signature authority.
- Use the **Purchasing Documents Matrix for Goods and Services** to identify the appropriate contract template.
- Contract templates: **Contracts & Forms**

GOODS
SUPPORTING DOCUMENTATION

- Vendor quote valid within 30 days
- Quote may not be required for open orders for recurring routine purchases.
- Vendor Form W-9 (if new vendor)

SERVICES
SUPPORTING DOCUMENTATION

- Fully executed agreement
- Proposal or Quote
- Insurance (if applicable)
- Vendor Form W-9 (if new vendor)

PURCHASE REQUISITION

- Submit a requisition and upload all required supporting documents.
- Refer to: **Purchase Requisition Manual**

PURCHASE ORDER ISSUANCE

- **SERVICES:** The vendor may begin work only after the purchase order has been issued.
- DO NOT AUTHORIZE WORK BEFORE PURCHASE ORDER IS ISSUED.
- **GOODS:** Purchasing will issue the purchase order to the vendor. DO NOT PLACE THE ORDER DIRECTLY WITH THE VENDOR UNLESS YOU HAVE AN AUTHORIZED OPEN PURCHASE ORDER.

INVOICE SUBMISSION
Upon completion of the work or receipt of the goods, submit the invoice(s) to accountspayable@fhda.edu and reference the purchase order number.

PURCHASE ORDER CLOSEOUT

- **Services:** Once all invoices have been paid, notify the Buyer listed on the purchase order to close the purchase order.
- **Goods:** The purchase order will be closed once all invoices have been paid.

DIRECT PAY REQUEST up to $5,000
May be used for:

- Limited Engagement Agreements
- Eligible one-time, non-service payments
- Reimbursements

- A Purchase Order is not required for eligible Direct Pay Requests.

END