

# Biggs Unified School District

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Superintendent

## **Purchasing: Request, Vendors, Account Balances, Returns, etc. FREQUENTLY ASKED QUESTIONS**

1. **I would like to make a purchase where do I start? (Note: curriculum/textbooks/reference material needs to be reviewed with site Principle)**
  - ❖ All orders need to be submitted in Escape by your site office/supervisor. You will need to provide the order details to your site for them to enter your request.
  - ❖ You may use the **Requisition** (request to purchase) form located on the District website here: [www.biggs.org/documents/Staff%20Forms/Requisition-Request-to-purchase.pdf](http://www.biggs.org/documents/Staff%20Forms/Requisition-Request-to-purchase.pdf) to provide the details needed for your order. (Accounts payable will not accept this requisition form, this form is only to provide the information to your sites.)
  - ❖ Submit the completed form to your site. (It is always a good idea to verify with your site office the best way to submit information to them. Procedures are subject to change.)
  - ❖ Be sure to include the vendor, ordering instructions, contact information, item details, item number, quantity, price, tax, shipping, etc. *You are also responsible for submitting the W-9 if the vendor is new.*
  - ❖ Accounts payable only accepts requests submitted by your sites, through Escape. No hard copies will be processed.
2. **How can I get a list of current vendors with Biggs USD?**
  - ❖ Send [mgraves@biggs.org](mailto:mgraves@biggs.org) an email asking for a list of Vendors. Or send the name of the vendor and she can let you know if they are an active vendor.
3. **I submitted my request, how long will it take to get processed?**
  - ❖ Once your ordered request is entered in Escape, your supervisor will select the appropriate funding, and approve or denied. The purchase will need Superintendent, CBO, and possibly Board approval.
  - ❖ Once the order is approved, accounts payable will print the PO.  
***Your order can now be processed.***
  - ❖ This process can take 5-7 business days. (Longer if board approval is required) Once the items are ordered, delivery depends on how fast the company ships out, and if there are shipping delays.
4. **I have an urgent order, how can I speed up the process?**
  - ❖ No guarantees can be made, but you can send an email to your supervisor and cc accounts payable letting them know your order is urgent. We will all work together to process the order as quickly as possible.

**5. How do I order from Amazon? \*\*\*We are new to purchasing with Amazon and have an account limit. This can cause delays in releasing orders. Amazon orders will be processed in the order they are received. \*\*\***

❖ **Create a list on your Amazon account following these steps.**

- i. Go to Account & Lists and select Your Lists.
- ii. Select Create a List and insert a list name.
- iii. Select Create List.
- iv. Select the three dots menu, and Manage List to update your shipping address and other preferences.
- v. Select Save Changes. (You can repeat this process to create an unlimited number of lists.)

❖ **Share Your List with your site office.** They will create a PO in Escape.

- i. Go to [Your Lists](#).
- ii. Choose the relevant list and select + Invite or **Send list to others**.
- iii. Choose one of the following options:
- iv. **View only:** Anyone with a link can view your list without being able to make edits.
- v. **View and edit:** People you invite can add or remove items from your list, change quantities and priorities, and post comments. They can also participate in a private group chat with you to exchange ideas to help you with your shopping. They will also receive notifications, including user names, each time someone joins or leaves your list.

**Note:** If your list was set up as **Private**, change to **Shared**.

- vi. Copy the link, or select Invite by email

**6. How do I order from Office Depot?**

❖ Log in to <https://www.odpbusiness.com/> using **Log in ID:** Biggs USD Employees, and **Password:**

Welcome1

- i. From the home page, search for your item in the top bar by item name or #
- ii. Add items to cart
- iii. If all your items are entered and ready to checkout. On the checkout screen, **the PO# will be 1, the Cost Center is your Name.**
- iv. Click Submit – This order will be put on hold.
- v. Once your order is submitted, the system will send an email to AP, letting them know there is an order waiting.
- vi. **PRINT or SAVE** your cart and **SEND** a copy to your site office in order for them to create a PO in Escape.

❖ **IMPORTANT REMINDERS:** Please be sure you actually **“SUBMIT”** your order. You must also SEND your order to your site office in order for a PO to be entered. AP will not be able to release your order without an approved PO that matches your cart.

**7. How much does the District provide for Classroom supplies? How do I know what my account balance is?**

- ❖ New Teachers: \$250 Returning Teachers: \$200
- ❖ To get your balance send [mgraves@biggs.org](mailto:mgraves@biggs.org) an email, she will respond with your balance.

**8. What if my order exceeds my classroom account balance?**

- ❖ If your cart total exceeds the amount in your account the order will be placed on hold. Accounts Payable will reach out to you and your supervisor via email. You will need to work with your supervisor to amend your order.

**9. My order is taking longer than expected, why?**

- ❖ Items could be out of stock, shipping delays, lack of description on your request, funding is unavailable, additional information was requested and not provided.

- ❖ Your order was declined.
- ❖ You can send [mgraves@biggs.org](mailto:mgraves@biggs.org) an email inquiring the status of your order.

#### 10. What if my order is incorrect? Or I need to return items?

- ❖ Notify accounts payables as soon as possible.
- ❖ If a return and re-order is an option, work with accounts payable to get that process started.
- ❖ Returns are never guaranteed. If items cannot be returned or refunded the funding source is still financially responsible for the costs of the order.
- ❖ *Please do not send your order back to Accounts Payable without communicating the need for a return first.*

#### 11. What if my order requires payment/PO to be processed on my personal log in?

- ❖ The requisitioner will be required to process order once the PO is approved.
- ❖ **Accounts payable will not log into your personal accounts to process an order.**
- ❖ Once accounts payable prints the PO, a copy will be sent to the requisitioner. You will be responsible for uploading the PO to the website or providing the details of the PO to the vendor in our personal set up.

#### 12. An invoice was sent to me directly, what should I do?

- ❖ Invoices need to be forwarded immediately to accounts payable either by **email:** [mgraves@biggs.org](mailto:mgraves@biggs.org), **fax:** 530-868-1615, **mail:** 300 B street, Biggs, CA 95917.

#### 13. What if my purchase is denied?

- ❖ Funding was not available.
- ❖ Items you requested were not approved/available.

#### 14. What if I want to make a purchase and get reimbursed?

- ❖ The **Reimbursement Claim form** can be found on the District website. <https://www.biggs.org/Staff/Employees/index.html>
- ❖ **Print and submit to your supervisor PRIOR to making purchases.**
- ❖ **Verbal approval from a supervisor will not be sufficient for a reimbursement.**
- ❖ Supervisors will give an amount not be exceeded in the upper right hand corner of your form. *Amounts that exceed the pre-approved amount are not guaranteed to be reimbursable.*
- ❖ Failure to get prior approval will result in your request being decline.
- ❖ Once you have written pre-approval you may make your purchase.
- ❖ Any items that are being shipped, must be shipped to **300 B Street, Biggs, CA 95917**. Items cannot be shipped to your personal residence or your site office.
- ❖ If you purchase items locally, you will need to bring the items, original receipts, and your pre-approved form, to your site office to be checked in.
- ❖ Once your purchased is checked in and signed, your reimbursement form will be sent to AP for processing.
- ❖ *All personal reimbursements are a case-to-case basis and require prior approval.*