

Adobe Sign

Francine Brissey
General Purchasing Manager

Intro

The right contract.

Familiarize yourself with Adobe Sign.

Loading documents.

Routing Documents.

Who signs where, signature boxes.

The elements of Adobe Sign.

The Right Contract

Prior to uploading a Document:

1. Ensure you are working with the correct contract (CSA, PW under 45k, MOU)
2. Verify that your consultant/contractor is in agreement with your document
3. Verify all required documents are attached (Conflict of Interest, Insurance, and W-9)
4. **Convert** your document to an **Archivable or Optimized PDF** prior to uploading

CSA

PW <45k

MOU

EAST SIDE UNION HIGH SCHOOL DISTRICT

CONTRACT SERVICES AGREEMENT (No. _____)

TO: BUSINESS SERVICES
 FROM: _____ SCHOOL/DEPT. _____ CONTACT PERSON _____ Ext# _____

1. PARTIES: The East Side Union High School District (ESUHSD), whose address is 830 N. Capitol Avenue, San Jose, CA 95133, and the following named Contractor:

Contractor Name (First, Middle Initial, Last) _____
 Address _____ CITY _____ ST _____ Zip _____
 Telephone _____ Fax No. _____
 Email: _____ SS or Federal I.D. Number _____
 Contractor's License # _____ Type _____ Expiration _____
 mutually agree and promise as follows and as per terms and conditions set forth on the reverse side of this page (page 2):

2. CONTRACT TERM: Effective dates: _____ to _____

3. CONTRACTOR'S OBLIGATION: In consideration of the compensation, the Contractor shall provide the following services, materials, products, and/or reports. Attach proposals and other documentation if available.

4. COMPENSATION: In consideration of Contractor's provision of services as described above, ESUHSD shall pay Contractor upon completion of services as follows:

Hourly Rate \$ _____ /hour Total hours _____ Total Fees \$ _____
 Other (i.e. monthly, quarterly, annually): _____

5. BUDGET CODE AND FUNDING SOURCE: _____
 FUNDING SOURCE: _____

FD	LOC	FROG	GOAL	FUNC	OBJT	RESC	YR	MGR	\$ AMOUNT
XX	XXX	XXXX	XXXXX	XXXXX	XXXXX	XXXXX	X	XXX	

6. APPROVALS: These signatures attest the parties' agreement hereto: East Side Union High School District:

School Site/Dept. Administrator _____ Date _____
 Business Services _____ Date _____
 (Associate) Superintendent _____ Date _____
 Board of Trustees _____ Date _____
 Contractor: _____ Date _____
 Signature _____ Date _____
 Printed Name _____ Title _____
 (Form #3002-23 mdc 8/03)



EAST SIDE UNION HIGH SCHOOL DISTRICT
 830 North Capitol Avenue, San Jose, CA 95133, Phone: 408-347-5070, Fax: 408-347-5075

CONTRACT

FOR LABOR & MATERIALS AND PUBLIC WORKS PROJECTS

THIS CONTRACT made and entered into this _____ day of _____, 20____ by and between _____, hereinafter called the "CONTRACTOR" and the EAST SIDE UNION HIGH SCHOOL DISTRICT, hereinafter called the "DISTRICT".

WITNESSETH: The parties do hereby contract and agree as follows:

- In consideration of payment not to exceed the sum of \$ _____ to be paid to Contractor by District, Contractor shall perform and complete the following work:

- Location of the work to be done at: _____
- The term of this contract shall begin _____ and be approximate completion by _____ (state) _____ (date)
- This contract includes the terms and conditions attached as numbers 1 thru 27. The Contractor, by executing this contract agrees to accept and comply with such terms and conditions.
- District representative shall perform inspection and acceptance of work.
 District Representative: _____
 Name _____ Position _____
 Dept _____ Phone: _____

6. All applicable laws and regulations of the Public Contract Code, Civil Code and Labor Code govern this Contract.
 7. IN WITNESS WHEREOF, the parties hereto have subscribed to this Agreement, including all Contract documents as indicated below, which must be on file with the District prior to the commencement of work.

Received by the Contractor:	Submitted by the Contractor:
_____ Drawings	_____ Liability Insurance Certificate
_____ Specifications	_____ Worker's Compensation Form Verification
P.O. # _____	_____ Affidavit of Compliance with Ed Code 45125.1
	_____ DIR Registration # _____

CONTRACTOR: _____
ACCEPTED BY: _____ Date: _____ Title: _____
 Proper Name of Contractor: _____
 License Number: _____ Expiration Date: _____
 Address: _____ Email Address: _____
 Phone: (____) _____ Fax: (____) _____

DISTRICT: _____
ACCEPTED BY: _____ Date: _____
 Marcus Battle, Associate Superintendent of Business Services

THIS AGREEMENT REQUIRES AN APPROVED PURCHASE ORDER PRIOR TO COMMENCEMENT OF SERVICES

CONTRACT FOR LABOR & MATERIALS and PUBLIC WORKS PROJECTS



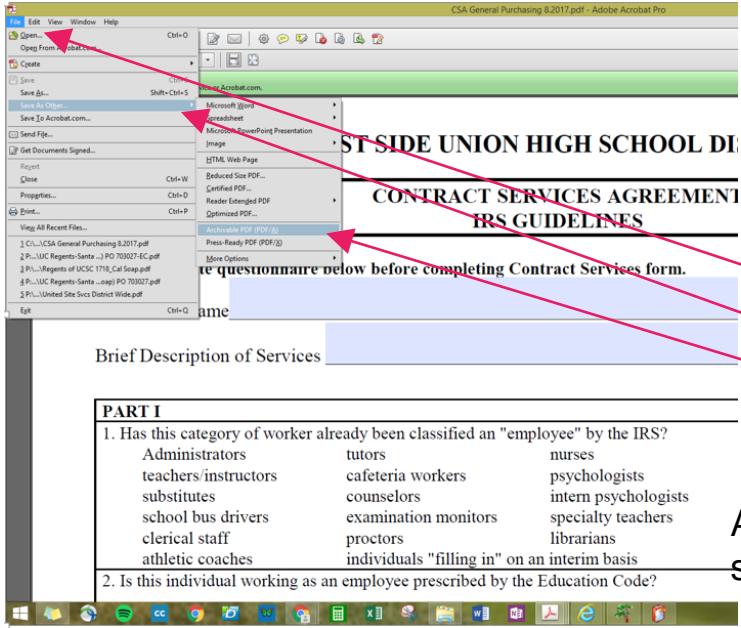
EAST SIDE UNION HIGH SCHOOL DISTRICT Memorandum of Understanding (MOU)

This MOU is made and entered into effective on the _____ day of _____, 20____, between the East Side Union High School District (hereinafter referred to as ESUHSD), and _____ (hereinafter referred to as Provider), in consideration of their mutual covenants, the parties hereto agree as follows:

- DESCRIPTION OF SERVICES:** See Attachment A
- PURPOSE OF MOU:** See Attachment A
- DUTIES OF PROVIDER:** The Provider agrees to provide the following services, materials, and/or products:
 See Attachment A
- DISTRICT OBLIGATIONS:** For the period of this MOU, the ESUHSD shall provide the following:
 See Attachment A
- PERIOD OF MOU:** The Provider's work as specified in this MOU shall commence on _____ and shall be completed on or before June 30, 2018.
- INSURANCE:** Reference General Terms and Conditions, G.2.
 The evidence of insurance is attached. OR
 The insurance requirement of this contract is waived. (Requires Assoc. Superintendent of Business Services' Signed Approval _____)

- GENERAL TERMS AND CONDITIONS:**
 - INDEMNIFICATION:** The Provider shall indemnify, defend, and save harmless the ESUHSD and its board members, officers, agents, employees, and volunteers from and against any and against all claims, liabilities and losses of any kind (including but not limited to claims for personal injury, property damage or losses or damages of any kind) accruing or resulting to any and all persons and which arise from or in connection with or relate to the activities of Provider and Provider's officers, agents, employees, contractors, and volunteers in the performance of, and the provision of any services in connection with, this MOU. The obligations set forth in this Paragraph G.1 shall survive the expiration or earlier termination of this MOU.
 - INSURANCE:** During the term of this MOU the Provider will maintain general liability insurance, automobile coverage, and workers' compensation coverage in accordance with Attachment B such amounts determined by ESUHSD and as may be reasonably necessary to assure compliance with the Indemnification obligations herein above. The ESUHSD shall be named as additional insured on an endorsement with respect to the liability coverage. The requirement of this provision may be waived in writing by the ESUHSD's Associate Superintendent of Business Services; however, such any waiver shall not affect the Provider's indemnification obligations to the ESUHSD hereunder.
 - NON-DISCRIMINATION:** Provider shall not discriminate against any person based on race, color, religion, age, sex, gender, actual or perceived sexual orientation, national origin, disability as defined by the Americans With Disabilities Act, medical condition or veteran's status in connection with the provision of any services under the MOU, and shall not discriminate against any employee or applicant for employment, not against any subcontractor or applicant for a subcontract on such grounds.

How to Convert to an Archivable PDF - PDF/A

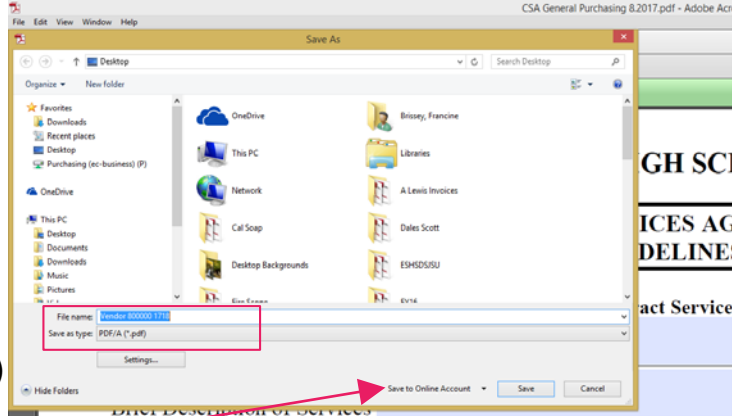


Open your completed document.

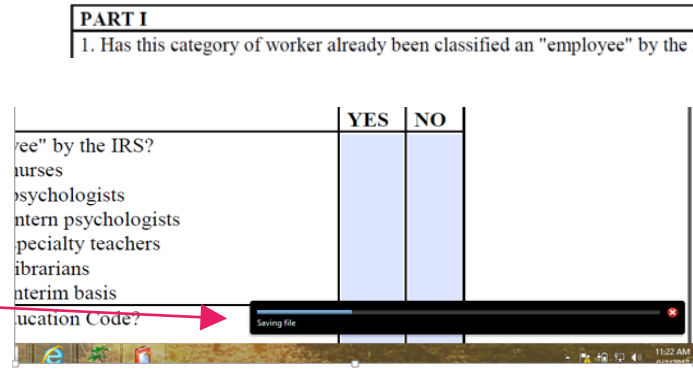
Go to:

File > Save as Other > Archivable PDF (PDF/A)

Adobe will prompt you to save your document.



You will see the conversion process taking place. Your document is complete when this box disappears.



Familiarize Yourself with Adobe Sign




Familiarize yourself with EchoSign.

Login to EchoSign with the credentials provided.

Sign In To Your Account

Email:

Password: 

Remember Me

[I forgot my password](#)

Adobe Sign

Dashboard Send Manage Reports

Hello, General What would you like to do?

Search documents, recipients & notes Search

Get a Signature

[Get a Document Signed](#)
Get a signature in seconds

Send from Library

Select a document Start

Additional Functions

[Add Template to Library](#)
Store frequently-used templates

[Create Widget](#)
Embed a signable document

[Only I Sign](#)
Sign anything you've been sent

[Archive a Document](#)
Upload into your account

[Mega Sign](#)
Send to many people at once

Quick stats on all contracts

Your Activity for This Month

Agreements Completed Median Time to Complete

25 50 75 100 0 30 60 90 120

0% 0.0 min.

+ 3 in progress See All

[View Reports...](#)

Recent Alerts

- North Bay Pensions CSA 16-17 has not been signed until Nov 8 at 10:59 am
- W-9 (Request for Taxpayer Identification Number) has not been signed until Nov 7 at 4:52 pm
- TGP CSA 16-17 has not been signed until Nov 7 at 4:51 pm

[More...](#)

Waiting For Me

You have no documents.

Recent Events

- YB ERP Roof Initiation_Revision Form V1.2016 1024 was sent to Sandy Nguyen for signature (Yesterday at 10:02 PM)
- WCO ERP Roof Initiation_Revision Form V1.2016 1024 was sent to Sandy Nguyen for signature (Yesterday at 10:02 PM)
- 180 Degrees CSA 16-17 was viewed by deanrenfrow@comcast.net (Yesterday at 5:21 PM)
- Facilities Department's JL ERP Roof Initiation_Revision Form V1.2016 1026 was e-signed by Sandy Nguyen (Nov 9, 2:26 PM)
- Facilities Department's AH ERP Roof Initiation_Revision Form V1.2016 1026 was e-signed by Sandy Nguyen (Nov 9, 2:25 PM)

[More...](#)

To start the process

Shows all recent activity on your current contracts

Any documents that are waiting for signatures from you

Loading Documents

Loading Documents

'Complete in Order' should always be highlighted

Route your document by entering the email addresses of all signing parties

Title your contract/MOU
"Vendor 'req number'
1617"
"MOU Vendor 1617"
Add a message if needed.

Drop your contract
here or press upload
to search your files

This box should
always be
checked

Adobe Sign

Dashboard Send Manage Reports General

Recipients What's New!

Complete in Order Complete in Any Order Add Me

1		vendor@email.com		Email	
2		principal@email.com		Email	
3		assoc.supt@email.com		Email	
4		brisseyf@email.com		Email	
5		genpurch@email.com		Email	
6		Enter recipient email			

Show CC

Message

Vendor 86XXXX 1718
Please review and complete Vendor 86XXXX 1718.

Files Add Files

	CSA General Purchasing	
	Conflict of Interest Statement	
	W-9 (Request for Taxpayer Identification Number)	

Drag More Files Here

Options ?

Password Protect

Signature Type

Electronic Written

Preview & Add Signature Fields

Next

Language: English, UK

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Routing Documents

Routing Documents - Contracts

--- Contract s CSA:

1. Vendor ' s Email Address
2. Principal / Director s Email Address
3. (Associate) Superintendent ' s Email Address
4. Purchasing Manager ' s Email Address: brisseyf@esuhsd.org
5. General Purchasing ' s Email Address: genpur ch@esuhsd.org

MOU ' s

1. Vendor ' s Email Address
2. ESUHSD Rep ' s Email Address
3. *** If Attachment G is added:
kingk@esuhsd.org ***
4. Associate Superintendent ' s Email Address
5. Purchasing Manager ' s Email Address: brisseyf@esuhsd.org
6. Superintendent : funkc@esuhsd.org

Routing Documents - Contracts ... Continued

Public Wrks Contracts <45k

1. Vendor's Email Address
2. Purchasing Manager's Email Address: brisseyf@esuhsd.org
3. General Purchasing's Email Address: genpurch@esuhsd.org

Contracts not on ESUHSD Templates

Please send to me for review prior to uploading.

Thank you!

Any backup documents should be emailed to genpurch@esuhsd.org and should include the REQ number!

All contracts over \$15,000.00 require 3 quotes - AR3311

All contracts over \$25,000.00 require Board Approval prior to the creation of a PO.

Any contract needing to go to the Board should be in brisseyf@esuhsd.org queue at least 1 month prior to the next Board Meeting!

The Elements of Adobe Sign

The Upload Page

RECIPIENTS
Francine Brissey (brisseyf@... (Signer)

- General Purchasing (me) (Prefill)
- ✓ Francine Brissey (brisseyf@esuhsd.org) (Signer)
- amadorl@esuhsd.org (Signer)
- velasquezma@esuhsd.org (Signer)
- General Purchasing (me) (Signer)
- Anyone

Data Fields

More Fields

Transaction Fields

Save to document library

Send

Reset Fields

Make sure the correct recipient is selected!

RECIPIENTS
vendor@email.com (Signer)

Signature Fields

- Signature
- Initials
- Signature Block
- Stamp

Signer Info Fields

Data Fields

More Fields

Transaction Fields

Save to document library

Send

Reset Fields

Drag and drop the signature field for EACH recipient.

You will need to add the Title and possibly the Date.

RECIPIENTS
vendor@email.com (Signer)

Signature Fields

Signer Info Fields

- Title
- Company
- Name
- Email
- Date

Data Fields

More Fields

Transaction Fields

Save to document library

Send

Reset Fields

GenPurch requires the text input box in BOTH the Contract NO. _____ and the Board of Trustees.

RECIPIENTS
vendor@email.com (Signer)

Signature Fields

Signer Info Fields

Data Fields

- Text Input
- Drop Down
- Check Box
- Radio Button
- Image

More Fields

Transaction Fields

Save to document library

Send

Reset Fields

Where to Place Signature Boxes...

MAKE SURE YOU CHANGE THE RECIENT FOR EACH SIGNATURE BOX DROPPED!!!

11. Does the individual operate an independent trade or business that is available to the general public?
A determining factor in judging independence is the performance of services to the general public. In evaluating this criteria, the District is considered to be a separate entity. Keep in mind: if the District is using this individual's services on a full-time basis, the individual is not available to the general public.

12. Does the individual have a substantial investment in his/her business, i.e. maintains a facility, equipment, etc.?
This is indicative of economic risk inherent in business enterprises. An independent contractor must be able to make a profit or sustain a loss.

If either 11 or 12 are "NO", the individual is a district employee STOP HERE and process the individual through Human Resources and payroll.

If 11 and 12 are both "YES", continue...

13. Does the individual provide all material and support services necessary for the performance of this service?
The District should not be providing office space on a regular basis, clerical, secretarial, or other support for the individual such as materials, copying, printing, office supplies, etc. Any necessary assistance should be provided by the individual.

14. Is this individual paid by the job or upon completion and acceptance of the work as a whole or milestones identified in the contract?

15. Does the individual bear the cost of any travel and business expenses incurred to perform this service?
Generally the individual will pay the cost of any travel and business expenses incurred to perform the work. However, some agreements may be made to provide for payment of airfare, mileage, etc. for consultants.

If 11 and 12 are "YES", 13 through 15 should also be "YES" and are items that should be written into the Independent Contract.

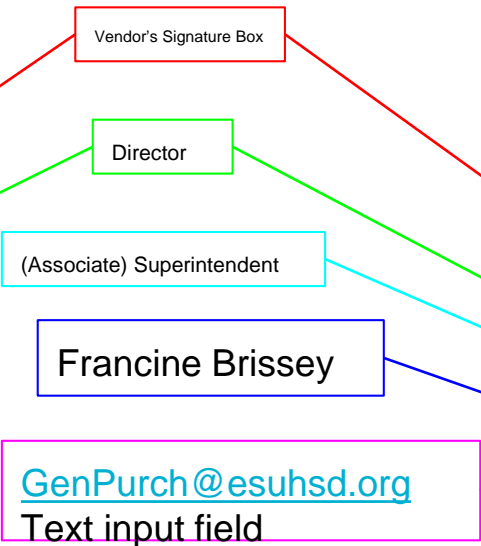
This individual is an Independent Contractor. A "YES" on questions 13 through 15 supports the district's conclusion and substantiates a "reasonable basis" for treatment as independent contractor. While there is circumstances where the district may pay contractually provided expenses, these should be kept at a minimum to avoid giving the impression of an employment relationship.

By signing below, Contractor and Program Manager attest that they have reviewed District guidelines and certify that the information above is true and correct.

Contractor Signature _____ Date _____
 Program Manager Signature _____ Date _____

Please attach questionnaire to completed Contract Services Agreement form and send to the Business Office.

(mdc 401)



EAST SIDE UNION HIGH SCHOOL DISTRICT

CONTRACT SERVICES AGREEMENT (No. _____)

TO: BUSINESS SERVICES
 FROM: _____ Est # _____
 SCHOOL/DEPT. CONTACT PERSON

1. PARTIES: The East Side Union High School District (ESUHSU), whose address is 830 N. Capitol Avenue, San Jose, CA 95133, and the following named Consultant:
 Consultant Name (First, Middle Initial, Last) _____
 Address: _____ CITY _____ ST _____ Zip _____
 Telephone: _____ Fax No. _____
 Email: _____ BS # or Federal ID Number _____
 Consultant's License # _____ Type _____ Expiration _____
 mutually agree and promise as follows: and as per terms and conditions set forth on the reverse side of this page (page 2).

2. CONTRACT TERM: Effective date: _____ to _____

3. CONSULTANT'S OBLIGATION: In consideration of the compensation, the Consultant shall provide the following services, materials, product, and/or reports. Attach proposals and other documentation if available.

4. COMPENSATION: In consideration of Consultant's provision of services as described above, ESUHSU shall pay Consultant upon completion of services, as follows:
 Hourly Rate \$ _____/hour Total hours: _____ Total Fees \$ _____
 Other (i.e. monthly/quarterly, annually): _____

5. BUDGET CODE AND FUNDING SOURCE:
 FUNDING SOURCE (PROGRAM NUMBER/NAME): _____

FY	QC	PROG	GOAL	FUNC	OBJT	RESC	YR	MGR	\$ AMOUNT
XX	XXX	XXX	XXXX	XXXX	XXXX	XXXX	X	XXX	

6. APPROVALS: These signatures attest the parties' agreement hereto:
 Consultant Contractor:
 Signature _____ Title _____
 East Side Union High School District
 School Site Dept. Administrator _____ Date _____
 (Associate) Superintendent _____ Date _____
 Purchasing _____ Date _____
 Board of Trustees _____ Date _____

Page 1 of 2

The Audit Report

Shane Safir EVHS 1718

Adobe Sign Document History 09/01/2017

Created: 08/24/2017
By: General Purchasing (GenPurch@esuhsd.org)
Status: Signed
Transaction ID: CBJCH@CAABA\ghorpXXkgf\ub5y@8hV\A6Sr\GQGQuAB

"Shane Safir EVHS 1718" History

- Document created by General Purchasing (GenPurch@esuhsd.org)
08/24/2017 - 2:53:46 PM PDT - IP address: 170.91.5.44
- Document emailed to shane@shanesafir.com for signature
08/24/2017 - 2:58:06 PM PDT
- Document viewed by shane@shanesafir.com
08/28/2017 - 12:59:45 PM PDT - IP address: 73.93.152.252
- General Purchasing (GenPurch@esuhsd.org) replaced signer shane@shanesafir.com with Jocelyn Fabello (safirassociates@gmail.com)
08/28/2017 - 1:51:42 PM PDT - IP address: 170.91.5.24
- Document emailed to Jocelyn Fabello (safirassociates@gmail.com) for signature
08/28/2017 - 1:51:42 PM PDT
- Document viewed by Jocelyn Fabello (safirassociates@gmail.com)
08/28/2017 - 1:58:05 PM PDT - IP address: 66.249.84.198
- Document e-signed by Jocelyn Fabello (safirassociates@gmail.com)
Signature Date: 08/28/2017 - 2:00:32 PM PDT - Time Source: server- IP address: 24.7.113.37
- Document emailed to Lauren Kelly (kelly@esuhsd.org) for signature
08/28/2017 - 2:00:33 PM PDT
- Document viewed by Lauren Kelly (kelly@esuhsd.org)
08/30/2017 - 7:40:34 PM PDT - IP address: 70.214.41.207
- Document e-signed by Lauren Kelly (kelly@esuhsd.org)
Signature Date: 08/30/2017 - 7:41:30 PM PDT - Time Source: server- IP address: 70.214.41.207

Created

Viewed

Signed

Completed

- Document emailed to Glenn Vander Zee (vanderzeeg@esuhsd.org) for signature
08/30/2017 - 7:41:31 PM PDT
- Document e-signed by Glenn Vander Zee (vanderzeeg@esuhsd.org)
Signature Date: 08/31/2017 - 7:53:36 AM PDT - Time Source: server- IP address: 162.228.221.155
- Document emailed to General Purchasing (GenPurch@esuhsd.org) for signature
08/31/2017 - 7:53:38 AM PDT
- Document viewed by General Purchasing (GenPurch@esuhsd.org)
08/31/2017 - 11:20:02 AM PDT - IP address: 66.249.84.218
- Document e-signed by General Purchasing (GenPurch@esuhsd.org)
Signature Date: 08/31/2017 - 11:31:25 AM PDT - Time Source: server- IP address: 170.91.5.92
- Document emailed to Francine Brissey (brisseyf@esuhsd.org) for signature
08/31/2017 - 11:31:25 AM PDT
- Document viewed by Francine Brissey (brisseyf@esuhsd.org)
08/31/2017 - 11:31:53 AM PDT - IP address: 66.249.84.192
- A signed copy was uploaded by General Purchasing (GenPurch@esuhsd.org)
08/31/2017 - 11:52:11 AM PDT
- Signed document emailed to General Purchasing (GenPurch@esuhsd.org), Jocelyn Fabello (safirassociates@gmail.com), Lauren Kelly (kelly@esuhsd.org), shane@shanesafir.com, and 2 more
08/31/2017 - 11:52:11 AM PDT

Changing a Signer

1. Click on a document that is in the signing process.
2. Select “Replace Signer”

Preview Screen

The screenshot shows a document preview interface. At the top, there are icons for Print, Enlarge, PDF, and Cancel. Below these, the document details are displayed: Date: 01/09/2017, 07:20; Status: Out for e-signature; Replace Signer (link); Upload a signed copy (link); Message: Please review and complete Amendment - ClassTech district wide.

Below the details, there is a list of document events with a vertical toolbar on the right containing buttons for View, Share, Protect, Remind, History, and Notes. The events listed are:

- Document created by General Purchasing (GenPurch@esuhsd.org) 31 Aug, 16:12
- Sent out for signature to Stacey Trampenau (joe@classtech.us) 31 Aug, 16:15
- Viewed by Stacey Trampenau (joe@classtech.us) 1 Sep, 07:18
- Document e-signed by Stacey Trampenau (joe@classtech.us) Signature Date: 1 Sep, 07:20 - Time Source: server
- Sent out for signature to Francine Brissey (brisseyf@esuhsd.org) 1 Sep, 07:20
- Waiting to be signed by Francine Brissey (brisseyf@esuhsd.org) Replace Signer (link) Upload a signed copy (link)
- Will be sent for signature to General Purchasing (GenPurch@esuhsd.org)

Changing a Signer

1. Open a document that is in the signing process.
2. Select “Replace Signer”.
3. Enter email address of the new signer.
4. Add Message as necessary.
5. Select “Replace Signer”.

Replace Current Signer

This agreement is waiting for bella@esuhsd.org to sign. To send this agreement for signature to a new signer, enter their email address and a message below.

Email:

Message:

[Replace Signer](#) [Cancel](#)

? Is your agreement waiting to be signed by someone who is currently out of the office? Did you mistype the signer's email address? Type the new signer's email address and a short message and assign a new signer to replace them.

Please note: Until the agreement is signed by the new signer, the original signer can still sign it. The original signer will get a copy of the signed agreement after it is fully executed.



Who Signs Where, Signature Boxes

Live Demo:

[Adobe EchoSign](#)

RPO's and PO's

Updates

The 'copy' function - Be cautious that all the information is accurate (account number, authorized signer, etc.)

Reviewing Requisitions - Remember to review all requisitions before you approve. Should be in final form prior to reaching (Associate) Superintendent.

Returning RPO's - Beginning January 25, 2018 Req.'s that do not have supporting docs sent to genpurch@suhsd.org will be returned to the requisitioner. **PLEASE READ YOUR NOTES TO UNDERSTAND WHY YOUR REQ WAS RETURNED AND HOW TO CORRECT IT.**

Supporting Documents

Doc's should be sent to genpurch@suhsd.org with the Req number in the title!

Make sure you include your vendors contact information (email address). - Especially if there is a change in reps or it is a new vendor.

RPO'S for	DOCUMENTS
BOOKS	SCAN & EMAIL ALL QUOTES TO PURCHASING W/REQUISITION # ON IT
OPEN ACCOUNTS (OFFICE SUPPLIES, INSTRUCTIONAL SUPPLIES, FRY'S, A/J GOLF, CUSTODIAL &/OR MAINTENANCE SUPPLIES... ETC)	FILE RPO AT YOUR LOCATION (WE DO NOT NEED YOUR OPEN ACCOUNT RPO)
COMPUTERS/TECHNOLOGY EQUIPMENT (COMPUTERS, CHROMBOOKS, SCANNERS, PROJECTORS, ETC)	SCAN & EMAIL ALL QUOTES TO PURCHASING W/REQUISITION # ON IT
COMPLETES (FOR EMERGENCY ONLY)	ON ALL INVOICES PLEASE SIGN, DATE, AND WRITE ON ALL INVOICES "SCANNED IN LEIU OF ORIGINAL AND SENT TO PURCHASING". SCAN & EMAIL THESE INVOICES TO PURCHASING WITH REQUISITION NUMBER ON IT.
FIELD TRIPS & BUS CHARTERS	SCAN & EMAIL STUDENT ACTIVITY FIELD TRIP FORM, BUS REQUEST FORM (WITH DENIAL STAMPED), AND QUOTE/INVOICE FROM CHARTERED BUS VENDOR TO PURCHASING W/REQUISITION# ON IT (USE OBJECT CODE #5880 FOR ALL FIELD TRIPS)
ADMISSION/REGISTRATION FEES OR TICKETS FOR FIELD TRIPS	SCAN & EMAIL ALL FIELD TRIP FORMS (SEE ABOVE) AND PRICE/QUOTE OF TICKETS TO PURCHASING W/REQUISITION# ON IT (USE OBJECT CODE #5880 FOR ALL FIELD TRIPS)
FURNITURE	SCAN & EMAIL ALL QUOTES TO PURCHASING W/REQUISITION # ON IT
SOFTWARE	SCAN & EMAIL ALL QUOTES TO PURCHASING W/REQUISITION # ON IT
SUBSCRIPTIONS, MAGAZINES	SCAN & EMAIL ALL QUOTES/INVOICES TO PURCHASING W/REQUISITION # ON IT
CATERING/FOOD	SCAN & EMAIL QUOTES, AGENDA OR FLYER AND LIST OF ATTENDEES TO PURCHASING W/REQUISITION # ON IT
CONFERENCES, HOTELS, & AIRLINE TICKETS	ENTER YOUR RPO INTO QCC, YOU HAVE ACCESS TO OBJECT CODE "6210". SEND ORIGINAL CONFERENCE APPROVAL, RPO & REGISTRATION FORMS TO SILVIA SEBO, SHE WILL SEND ORIGINAL CONFERENCE APPROVAL BACK TO YOU. SHE WILL GIVE RPO WITH COPIES TO PURCHASING. ONCE APPROVED IN QUEUE BY APPROVERS, PURCHASING WILL APPROVE AND RELEASE PO.
CONTRACT SERVICES & MOUS	ENTER YOUR CONTRACTS AND MOUS THROUGH ADOBE ECHO SIGN. ENTER CONTRACTS INTO QSS. YOU HAVE ACCESS TO OBJECT CODE "5840". CONTRACTS UNDER 25K: PURCHASING WILL RELEASE AND APPROVE CONTRACTS IN QUEUE ONCE IT'S BEEN SIGNED BY ALL APPROVERS AND WILL ADD TO THE UNDER 25K BOARD MEMO FOR RATIFICATION. CONTRACTS OVER 25K: PURCHASING WILL RELEASE AND APPROVE CONTRACTS IN QUEUE AFTER BOARD APPROVAL.

PO Search

You can review your PO's for the year by conducting a simple PO search under 'Advanced Search' enter your Buyer Code.

WHY?

Which Contracts/ Open PO's do you need to refresh for the next school year.

Handout is included for more information.

Entering RPO's

Reviewing handouts.

Handouts will be posted to our internal site.

AP View

Viewing Payments Applied to your PO

Under AP/ Purchasing file, locate "Accounts Payable"

Select "P. O Payments (PO)"

Enter the REQ # or PO # assigned to the order.

Click "Search" button

Other AP Tips

Forward all invoices directly to Accounts Payable
(accountspayable@suhsd.org)

Please include P. O # and signature.

If the order has not been received in its entirety, inform Accounts Payable that you can not sign the invoice until all items are received.

Substitution of items and/or order of additional items will produce discrepancies and will delay payments.

Questions?

For any questions or troubles along the way, call purchasing, we can help. Any issues you experience, call purchasing, so we can help others who may be having the same issues.

Adobe Sign. QSS.
General
Purchasing.

Thanks!

Contact us:

genpurch@suhsd.org

Francine:

408-347-5071

Margaret:

408-347-5073

Liz:

408-347-5072

