



West Valley-Mission  
Community College District

# PURCHASING PROCEDURES

General Services & Purchasing Department  
West Valley-Mission Community College District

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## Introduction

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This guide is designed to help you navigate the purchasing process accurately and efficiently. Please review each section carefully and refer to this guide whenever needed.

You can also refer to the District Website for more information and guides to help you through your process.

## 1. Creating a Requisition

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### A. General Requirements (INB & SSB)

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The same requirements apply regardless of whether you use INB or SSB. Note: NSF requisitions cannot be processed in SSB and must be handled in INB.

#### Document-Level Accounting

- Must be unchecked when using multiple FOAPs
- This must be done when first creating your requisition.

#### Required Backup Documentation

All backup documentation must be submitted in PDF format. Upload one or more of the following:

- Quote, Invoice, or Estimate
- Proposal
- Scope of Work
- Agreement

#### **⚠ IMPORTANT**

Do NOT include budget information in backup documents.

Do NOT upload a W-9 with the requisition.

Vendor terms must NOT include auto-renewal clauses.

#### Requisition Accuracy

- The requisition must match the quote, invoice or proposal.
- If there are multiple items on the vendor's quote, please make sure that all line items are your requisition.

## Catering Requirements

Catering requisitions must include ALL the following:

- Valid health certificate
- Valid business license
- Valid insurance (general liability and auto)
- Quote or Invoice
- Email approval from Michael Robins prior to the event
- Food Purchase Order Form approval for purchases over \$10,000

## Service-Related Requisitions

Applies to repairs, maintenance, speakers, performers, and installations.

- A Request for Contract (RFC) is required
- If the service is Public Works and exceeds \$25,000:
  - Bonds are required
  - Bonds must be included in the vendor's quote

## Software Requisitions

- A VPAT (Voluntary Product Accessibility Template) from IT/IS is required
- Both new Software and Renewals will need a VPAT

## Detailed Descriptions Required

Avoid vague descriptions. Each line item must be clearly identified. Examples of good descriptions:

- Dell Laptop 16 Pro, Item #232345
- CPR Training Manikins
- DJ Service for Halloween 5K Run (10/1/2026, 3–5 PM, setup at 1 PM)
- Open PO for dry cleaning services
- Textbooks – How to Talk So Kids Listen, ISBN #4515684

### AVOID VAGUE DESCRIPTIONS SUCH AS:

“Open PO” • “Services” • “Speaker”

## New Vendors

- To set up a new vendor, email the vendor's current W-9 to: [W9@wvm.edu](mailto:W9@wvm.edu)

### TIMING REMINDER

Requisitions and POs must be completed BEFORE services are rendered.  
Do not proceed with any work until a PO has been approved.

## B. Regular “R” vs. Standard “S” POs

Use the table below to determine which PO type applies to your purchase:

| Standard "S" POs             | Regular "R" POs                      |
|------------------------------|--------------------------------------|
| Bulk shipments               | Items received through the warehouse |
| Services                     | Books                                |
| Speakers / Performers        | Computer items                       |
| Independent contractors      | First aid kits                       |
| Software licenses            | Musical instruments                  |
| Items picked up directly     |                                      |
| Furniture delivered directly |                                      |
| Open POs (Amazon, ODP)       |                                      |

## C. Approvals

- All requisitions require approval routing before processing
- Before contacting Purchasing, check the status in INB or SSB
- Allow 2–3 business days for processing once received by Purchasing

## D. Line-Item Limit

- Maximum of 20-line items per requisition (including additional text lines)
- If your requisition exceeds 20 items, contact the Purchasing Manager before submitting

## E. Invoices

- Submit invoices to Accounts Payable at: [invoice@wvm.edu](mailto:invoice@wvm.edu)
- Approved invoices must be signed and dated by the approver
- If your PO has multiple FOAPs, indicate on the invoice which FOAP funds each line should be charged to

### ADDITIONAL RESOURCES

Step-by-step guides are available on our website:

<https://www.wvm.edu/services/general/purchasing/documents.html>

## 2. What Happens After Submission

Once Purchasing receives your requisition, the following review process begins:

|   |                       |   |
|---|-----------------------|---|
| 1 | Document Review       | Purchasing verifies the requisition and all attached backup documentation for completeness and accuracy.  |
| 2 | Missing Documentation | If anything is missing, Purchasing will contact the requestor. The PO will NOT be processed until all required documents are received.  |
| 3 | Contracts & RFCs      | RFCs are reviewed by Michael Robins. Contracts are created by Don Mackessy (if required). The PO will not be issued until the contract is fully executed and any required bonds are received. |
| 4 | PO Issuance           | Once all steps are complete, the Purchase Order is issued to the vendor.  |

### EXCEPTION

Open POs (Amazon, ODP, dry cleaning services) are NOT placed by Purchasing. These are managed directly by the requesting department.

## 3. PO Change Requests

When submitting a PO Change Request, the following information must be included:

| Field                           | Details   |
|---------------------------------|---|
| PO Number                       | The original Purchase Order number              |
| Current / Revised PO Amount     | Current PO amount or the revised PO amount      |
| Increase or Decrease Amount     | The dollar amount you want to increase/decrease |
| New Total Amount                | The resulting total after the change            |
| Current FOAP                    | The existing FOAP on the PO                     |
| New FOAP (if applicable)        | Updated FOAP, if the funding source is changing |
| FOAP Distribution (if multiple) | How funds are split across accounts             |
| Vendor Name                     | Full name of vendor                             |
| Description of Request          | Clear explanation of why the change is needed   |