

Purchase Order Process

1. An employee looking to place an order for a product/conference/subscription needs to submit a request for a purchase order. If the request is for a physical item, a quote should be included when applicable. If the request is for a conference or training, the fully approved MyLearningPlan should be included. For any subscriptions or memberships, please try to have a purchase order in place before an invoice is received. If we do not have a purchase order in place, please sign the invoice and include it with your request. The purchase order request should be submitted to your building's/department's secretary.
2. The secretary will then input the requisition into WinCap, where it must go through multiple levels of approval. The levels are: the secretary, the building's/department's administrator, business office staff, and lastly the Assistant Superintendent of Finance, Facilities, & Operations. At that point the business office will send the purchase order to the vendor to place the order.
3. If a physical product is delivered with a packing slip, the employee receiving the product should sign the packing slip and send it to the accounts payable department. If no packing slip is included, ask your building's/department's secretary for a printed copy of the purchase order to sign and send to the accounts payable department. If at any point an invoice is sent to the employee, they should sign it once the order has been fulfilled, and send it to the accounts payable department. The order will not be paid until accounts payable has received a signed invoice.

For any questions, please contact Jason Balbo in the business office at (914) 693-1500 ext. 3025 or balboj@dfs.org.