



## **STANDARD OPERATING PROCEDURES for Purchasing up to \$50,000 Goods, Equipment, and Technology**

1. Program office (requisitioner/requestor) shall contact the program office fiscal coordinator or grants management accountant to ensure funds are available for purchasing.
  
2. Program office shall visit the Procurement webpage for Purchasing to review procedures and/or obtain the appropriate forms.
  - ✓ Request for Services or Goods Form
  - ✓ Request for Services or Goods Form - GUIDE
  - ✓ Purchase Order Change Form (Form updated)
  - ✓ Purchase Order Report
  - ✓ Return of Goods Form
  - ✓ Purchase Order Procedures
  - ✓ Quote Form
  - ✓ Quote Guide

### **MDE Equipment Repairs**

- ✓ Quote Form
- ✓ Quote Guide

### **State Procurement Card Program**

- ✓ State Procurement Card Log
- ✓ State Procurement Card Cardholder Agreement
- ✓ State Procurement Card Food Purchases Form
- ✓ State Procurement Card Missing Documentation Affidavit
- ✓ VISA Purchasing Card Dispute Form
- ✓ DFA State Procurement Card Guidelines
- ✓ MDE Procurement Card Program Guidelines
- ✓ Procurement Card Services

### **Shopping Cart**

- ✓ Shopping Cart Routing Form
- ✓ Shopping Cart Instructions – Requestor and Reviewer
- ✓ Shopping Cart Instructions – Manager
- ✓ Edit a Shopping Cart

### **Food and Space Request for Business Meetings**

- ✓ Request to Purchase Food and/or Space for Business Meetings Form used for food purchases for business meetings
- ✓ GUIDE - Request to Purchase Food and/or Space for Business Meeting
- ✓ Quote Form
- ✓ Quote GUIDE

### **State Purchasing Law/Guide**

- ✓ Procurement Manual
- ✓ Purchasing Law Update

### **GOODS PURCHASE**

Program office shall purchase goods using the following steps.

- ✓ Complete a Shopping Cart Routing Form for assigned procurement roles
  - ✓ Submit form to the Office of Procurement for processing.
  - ✓ OTSS/DFA shall assign Shopping Cart user roles.
  - ✓ Visit the Procurement webpage for Purchasing to review Shopping Cart instructions.
3. Please do NOT request equipment and technology purchases in Shopping Cart. See procedures below for **SOFTWARE/EQUIPMENT/HARDWARE PURCHASES.**
  4. Program office shall visit the Mississippi's Accountability System for Government Information and Collaboration (MAGIC) webpage to access Shopping Cart for purchases .
    - ✓ Complete and upload supporting documentation in MAGIC for Shopping Cart processing.
  5. Program office shall ensure the Shopping Cart includes the appropriate supporting documentation to process purchases less than \$50,000.
    - ✓ Request for Quote Form
    - ✓ Vendor Quote
    - ✓ Other documentation, if applicable
  6. Program office shall provide a quote form, vendor quote(s) and supporting documentation for each request.
    - ✓ Less than \$5,000 – one vendor quote
    - ✓ Greater than \$5,000 – two vendor quotes
    - ✓ Greater than \$50,000 – Invitation for Bid is required
  7. Program office shall provide vendor quotes that are comparable or similar in nature and accurate. (Please identify item compared between vendors)

8. Program office shall provide the required supporting documentation in the Shopping Cart's notes and attachments section to assist Purchasing Analysts with review of non-state contract item requests.
9. Purchasing Analyst shall review Shopping Cart for compliance to process a purchase order (PO).
10. Purchasing Analyst shall place notes in the Shopping Cart's internal notes to alert requestors of pertinent information required to process a PO.
11. Program office shall modify the Shopping Cart as requested and resubmit the cart for processing.
12. Purchasing Analyst shall review modification and process request for a PO.
13. Purchasing Analyst shall forward purchase request to the Procurement Director to approve a PO in MAGIC to generate to the awarded vendor.
14. Procurement Director shall email the approved PO to the program office, purchasing staff, Accounts Payable, Fixed Assets, and mailroom staff, if required.
15. Program office shall monitor shipping of items to ensure timely delivery.
  - ✓ Items purchased shall be shipped and received by June 15 of each year.
  - ✓ Items shipped but not received by June 15 shall be tracked and Accounts Payable notified of undelivered items and planned date of delivery.
  - ✓ Items tracked, shipped, and received after June 30 the requestor shall deobligate the existing PO before June 30.
  - ✓ The requestor shall request a new PO after July 1, if items are received after June 30.
  - ✓ The new Shopping Cart request for a PO shall include the following support in MAGIC (Notes and Attachment):
    - ✓ A copy of the deobligated PO and original documents submitted to the Office of Procurement for processing of the original PO.
    - ✓ A justification memo explaining the circumstance signed by a Bureau Director or above.
16. Program office shall verify the shipped order upon receipt.
17. Program office shall report any discrepancies with orders to the Office of Procurement immediately.
18. Program office shall attach the PO to the invoice within 30 days of receipt and submit to Accounts Payable for payment.

### **SOFTWARE/EQUIPMENT/HARDWARE PURCHASE**

Program office shall purchase equipment/hardware/software technology using the following steps.

1. Program office shall ensure equipment purchases are budgeted appropriately by the Office of Budget prior to submission of a request to purchase.
2. Program office shall ensure there is adequate budget authority to make the purchase. All purchases are subject to the availability of funds.
  - ✓ Authorized signature by person responsible for verifying budget will sign blue and white technology purchase request form.
3. Program office shall send an email to [mdenet@mdk12.org](mailto:mdenet@mdk12.org) with the subject line **“Technology purchase approval request.”**
4. Program office shall attach to the MDENET email the blue and white technology purchase request form (signed by the Office Bureau Director). The form shall be downloaded from the OTSS web page ([click here](#)).
5. Program office providing the quote(s) shall attach it to the email also. If a quote is not obtained, OTSS will provide a quote for you.
  - ✓ Products \$5,000 or less- 1 quote
  - ✓ Products \$5,000.01 - \$50,000- 2 quotes
  - ✓ Products \$50,000.01 or more - will require request for bid/Mississippi Department of Information Services (ITS) approval
6. OTSS shall return the technology purchase request form and quote to the program office with OTSS approval signatures. Then, the purchase can be made following MDE policies and procedures.
7. In the event the purchase is not approved, OTSS shall return the technology purchase request form to the program office marked **“Disapproved”**, and the program office cannot proceed any further with the procurement.
8. Upon approval from OTSS, the program office shall submit the following documentation to the Office of Procurement for approval of a PO.
  - a. Request for Goods and Services Form (Requisition)
  - b. Technology Purchase Request Form (Approved by OTSS)
  - c. Quotes (provided by requesting program office or OTSS)
    - ✓ Products \$5,000 or less- 1 quote
    - ✓ Products \$5,000.01 - \$50,000- 2 quotes
    - ✓ Products \$50,000.01 or more – will require request for bid/ITS approval
    - ✓ Products on EPL can be purchased by agency up to the EPL amount.

Refer to ITS [procurement manual](#) for approved thresholds on page 124. The manual will define procedures and required approvals for each category and project lifecycle cost range.
9. Program office shall receive approved packet from OTSS.
10. Program office shall obtain the *Request for Services or Goods Form (requisition)* for

equipment and technology purchases only.

- ✓ Program office is responsible for ensuring the vendor is registered in MAGIC prior to submission to the Office of Procurement for processing. If there is an issue with registration, please call the MMRS Call Center at 601-359-1343, Option 2 for assistance.
- ✓ Program office fiscal coordinator and authorized designee shall review, approve, and sign the requisition.

**Request for Services or Goods Form:**

- ✓ Vendor is a registered supplier in the MS Accountability System for Government Information and Collaboration (MAGIC)
  - ✓ Supplier number is affixed on requisition
  - ✓ Vendor information align in MAGIC
  - ✓ Verify all internet order amounts
  - ✓ Product numbers, pricing and est. shipping verified by vendor
  - ✓ Requestor/Requisitioner and authorized signatures are not the same person
  - ✓ Date and phone number provided
  - ✓ Supporting documentation align with quote request
  - ✓ Quantity, unit, description, totals align
  - ✓ Budget codes accurate
  - ✓ Funds approved by fiscal coordinator
  - ✓ Technology related items reviewed and approved by OTSS
  - ✓ PO Change Form and PO number provided for a modification request
  - ✓ Quotes attached mirror for each vendor
  - ✓ W-9 attached for new vendors
11. Program office shall submit OTSS' approved packet and supporting documentation to the Office of Procurement for processing.
  12. Purchasing Analyst shall email an Information Request Checklist and return packet to the program office if a modification to the requisition packet is required.
  13. Purchasing Analyst shall process the technology packet for a PO.
  14. Purchasing Analyst shall forward purchase request to the Procurement Director to approve a PO in MAGIC to generate to the awarded vendor.
  15. Procurement Director shall email the approved PO to the program office, purchasing staff, Accounts Payable, and mailroom staff, if required.

**SPECIAL CIRCUMSTANCE FOR TECHNOLOGY PROCUREMENTS**

1. For quotes that require a signed technology agreement for hardware and/or software purchases, the program office will include in their packet the following items in addition to the documentation listed above:
  - ✓ the Contract Justification-Information Technology (IT) Related Products and Services Form (located on the Office of Procurement webpage)

- ✓ the signed agreement reviewed and approved by the Chief Officer and OTSS
  - ✓ all supporting documents approved by OTSS and a requisition
2. Program office shall submit the technology packet to the Office of Procurement for contractual processing.
  3. Contract Analyst shall submit the packet to the purchasing analyst for processing.
  4. Purchasing Analyst shall process request in MAGIC.
  5. Purchasing Analyst shall forward purchase request to the Procurement Director to approve a PO in MAGIC to generate to the awarded vendor.
  6. Procurement Director shall email the approved PO to the program office, purchasing staff, Accounts Payable, and mailroom staff, if required.

### **ITS APPROVED PROCUREMENTS/CONTRACTS**

1. Program office shall work with OTSS on the approval of ITS related procurements.
2. OTSS shall provide the program office with CP-1 approval received from ITS.
3. Program office shall submit the packet to the Office of Procurement for PO processing:
  - ✓ Request for Goods and Services Form (Requisition) with MAGIC contract number affixed
  - ✓ A copy of the approved CP-1