

Policy & Procedure Manual

PURCHASE REQUEST – FD-VIII-1

POLICY:

Purchases of supplies and/or services may be requisitioned on a Purchase Request Form or a Maintenance and Repair Work Order, as applicable.

PURPOSE:

This process is required in order to provide accurate and timely ordering of goods and services and to ensure proper authorizations have been received prior to ordering.

To ensure that no new Health and Safety hazards have been introduced.

PROCEDURE:

1. A Purchase Request Form (FD070) is to be completed for goods and a Maintenance and Repair Work Order (FD180) for maintenance work with an approved contractor listed on the Blanket purchase order list. Both will be approved as per the Delegation of Authority Policy FD-VIII-5. The "approver" and "requester" may be the same as long as the purchase amount is in compliance with the Delegation of Authority Policy.
2. The requester will indicate on the Purchase Request form if the applicable required quotes have been attached and if the goods have been already ordered using a blanket purchase order currently in place. The "approver" will forward it to the Finance Department.
3. If the order requires a purchase order, Finance will issue a pre-numbered purchase order. Goods will not be ordered until purchase order has been issued and a completed contractor package received, if applicable.
4. The Finance department may assist with locating an appropriate supplier taking into account price, quality, delivery and service, as well as, placing the order.
5. Upon receipt of the goods, any packing slip (or sales slip) will be signed and dated by the recipient and forwarded to Finance. If there is not a packing slip or sales slip available, a Goods Received Report is completed in its place. Receiver will ensure goods are properly labelled as appropriate.

PROCEDURE (continued):

6. If maintenance work is required using one of the approved contractors, a Maintenance and Repair Work Order is completed and approved as per the Delegation of Authority Policy FD-VIII-5.
7. The Maintenance and Repair Work Order will only be used for those approved contractors identified on the Blanket Purchase Order listing and will be no greater than the Quotation "None Required" amount identified in the Quotation and Tender Requirements Policy. If the amount of the work will be higher than that refer to Purchase Order Policy FD-VIII-2.
8. Once the work is completed, the contractor will sign indicating what work was performed and dated.
9. All equipment will be installed by qualified personnel and inspected by the department receiving the goods. An ongoing maintenance program will be initiated as per Policy HR-XI-20 Preventative Maintenance Program Policy. Any modification of equipment will not be allowed without the manufacturer's advice regarding the safety design. These modifications will only be performed by qualified personnel. All equipment will adhere to applicable safety standards (i.e. CSA, ULC).

RECOMMENDED BY: Director, Finance and Administration

APPENDICES: 3

OPERATIONAL ACCOUNTABILITY: Administration, Finance, Human Resources, Community Services Administration, Community Services (all)

ORIGINAL POLICY DATE: February 1995

AUTHORIZED BY: Executive Director

SIGNATURE



GOODS RECEIVED REPORT

SUPPLIER: _____		
DESCRIPTION		
RECEIVED BY: _____		DATE: _____
LOCATION: _____		

FD080/NOV 2011

GOODS RECEIVED REPORT

SUPPLIER: _____		
DESCRIPTION		
RECEIVED BY: _____		DATE: _____
LOCATION: _____		

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