Scope: Residential Life

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Policy

1. Material or equipment requisitions are submitted by Foreman or Warehouse Manager when material is required for work orders or projects.

   a. The following process will be used by staff for ordering and receiving materials.

      i. Foreman will enter a requisition for material in MAXIMO in order to obtain materials.

      ii. Warehouse Manager will approve the requisition and convert it to a purchase order. Warehouse Manager will submit purchase order to Admin Coordinator 3 or 4 for purchase. Admin Coordinator 3 or 4 will submit orders via P-Card or Procurement system.

         1. If the purchase is $1000 or more and not eligible for purchase with the Louisiana “LA Carte” card, a PRO requisition must be completed, approved by the Director, finalized by the Business Manager, and forwarded to Purchasing for procurement actions.

         2. If the purchase is less than $1000, it can be made with the Louisiana “LA Carte” card. A MAXIMO purchase order will be created and the order placed directly with the vendor.

      iii. Once the order has been placed, the Admin Coordinator 3 or 4 will then give the Inventory Clerk all paperwork associated with the order. This paperwork may include: purchase ticket/quote, copy of Maximo purchase order, copy of Pro requisition or purchase order, work order number, and account code.
iv. When materials are received, the Inventory Clerk or Foreman will verify that the items match the corresponding paperwork. The Inventory Clerk or Foreman will verify that the order is complete and all received materials are accounted for on the purchase order.

1. If a partial delivery is made, the items received are processed via the designated procedure. The purchase order will remain open until all items are received. All open purchase orders will be reviewed weekly and notes will be added accordingly.

v. The packing slip will be signed and dated by the staff member receiving the items. All items will be moved to a secure location immediately. Items received for work orders will be marked and placed in a designated staging area. Items for stock will be placed in a designated location.

vi. In Maximo, the Inventory Clerk will receive items on purchase orders and issue items to a work order or to a storeroom. They will approve the work order and notify maintenance staff, via email and radio, that waiting on material items are received. They will forward all paperwork to the Admin Coordinator 4 for processing.

vii. The Admin Coordinator 4 will verify that all information is correct, mark the paperwork as received and forward the paperwork to the Residential Life Business Office, Accounts Payable, Room 308, Grace King Hall, where it will be processed for payment.