

# Authorization for Expenditure

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## **AUTHORIZATION FOR EXPENDITURE**

1. An Authorization for Expenditure (AFE) form must be completed for all purchases which use Federal Funds and/or professional development activities.
2. AFE forms must be completed electronically, printed and signed by all departments indicated on the form before a purchase order can be processed, or before workshop/conference registration is begun.
3. The AFE form is available on the district website under the “for Staff” tab in the employee downloads section.
4. Federal Funds can only be used for purchases and professional development activities which support the Campus Improvement Plan (CIP) or District Improvement Plan (DIP).
5. Each AFE must identify the specific goal, objective and strategy found in the DIP/CIP which the purchase/activity supports. Additionally, the completed form must include a description of the DIP/CIP goal/objective/strategy which is supported the by the requested purchase/activity.
6. Each AFE must provide a description of how the intended purchase or activity will improve student achievement.

## **COMPLETING PURCHASE ORDERS**

1. Please make sure the information is completed in the Vendor and Ship to section of the P.O.
2. When indicating the materials or items to be ordered, you may attach a typed copy of the order and indicate “See Attached” on the P.O., or you may type the order directly on the P.O. When items are handwritten, the likelihood of an error occurring increases.
3. Make sure there is a phone and fax number listed for the vendor.
4. Indicate the shipping charges. If no shipping is charged, please indicate “FREE SHIPPING”.
5. Indicate the “TOTAL” of the P.O. including shipping charges at the bottom of the P.O. where it says “Encumbrance Amount”.
6. Sign and Date the P.O.
7. Indicate the fund you want to pay the P.O. from.
8. Send the P.O. to the appropriate person.
  - a. Local Fund 199 P.O.’s - Send to Juanita Towns at the Business Office(check to see if it is able to be paid out of federal funds)
  - b. Activity Fund P.O.’s - Send to Juanita Towns at the Business Office
  - c. Special Education P.O.’s – Send to the Co-Op attention Vera Holguin
  - d. Federal Funds (Supplies) Send to Juanita Towns at the Business Office
  - e. Federal Funds ( Curriculum and Staff Development) – Send to Donna Price at the Curriculum Office

- f. Nurse and Band P.O.'s – Send to Donna Price at the Curriculum Office
- g. Career and Technology – Send to Donna Price at the Curriculum Office
- 9. Do **NOT** order materials and then send a P.O. through. This is not proper procedure and Causes problems in the bookkeeping due to misalignment of dates and could result in the cancellation of a P.O.
- 10. All orders will be placed through the business office. Do **NOT** place the order yourself then send the P.O. through. This may cause a duplicate order being processed.
- 11. Once the order has been placed, the Pink and Green copies of the P.O. will be returned to the campus.
- 12. Once you have received ALL of the items, send the pink copy of the P.O. to Juanita Towns.
- 13. Most importantly – PLAN AHEAD! Submit P.O.'s at least 2 weeks prior to need of materials and services.
- 14. If an emergency arises, go over to the Administration Building with the P.O. Poor planning does not constitute an emergency.

Notice: If you need to include special instructions to the Business Office, please do not use the space provided for P.O. number.

## **COMPLETING CHECK REQUESTS**

- 1. A Check Request can only be submitted for an activity or purchase that has already been approved with an AFE form.
- 2. Check Requests must be used to get reimbursed for meals and other approved travel expenses. Meal and other personal receipts must be submitted for reimbursement to the business office within 2 weeks of the end of the conference/workshop. Failure to submit receipts for reimbursement within the 2 week period may result in non-reimbursement.
- 3. Please submit one of the following items as documentation when submitting a request for reimbursement:
  - a. Name badge from conference/workshop/training
  - b. Certificate of Completion

If you have any questions, please contact Juanita Towns at the administration Building.

Updated: August 8, 2011