

## Purchasing Authorization

### 205.1 PURPOSE AND SCOPE

The purpose of this policy is to establish procedures with respect to obtaining necessary approvals prior to the purchase of goods and/or services. This policy applies to all employees responsible for purchase of goods and services.

### 205.2 AUTHORITY AND REFERENCES

- Executive Committee;
- Riverside County Board of Supervisors Policy A-18;
- Riverside County Ordinance 459;
- Riverside County Purchasing Policy Manual;
- Office of the Auditor-Controller Standard Practice Manual #206.

### 205.3 POLICY

Management approval is required prior to any purchase of goods and/or services. It is the responsibility of the manager approving the request to ensure that he/she has appropriate level of authorization per County and departmental policies.

### 205.4 PURCHASE AUTHORIZATION FORM (PAF)

The purpose of the Purchase Authorization Form (attachment) is to serve as the primary method of approval for the purchase of goods and services for the department. The PAF is needed in all purchases except:

- Court-ordered purchases;
- Board of Supervisors approved purchases;
- Employee travel or training;
- Sole source purchases;
- Supply service and printing services requisitions;
- Request for capital asset, contract services, leases, capital projects;
- Utilities, including trash, phone bills, etc.;
- Uniform replacement vouchers.

When completing a PAF, all fields of the form should be completed by the requestor. This includes a detailed explanation justifying the purpose of the expenditure. Completed PAF's should be signed by the Division Director or designee.

Division approved PAF's should be submitted to the Fiscal Services Division (FSD) Purchasing Unit for approval prior to making purchases. The Purchasing Unit will review the PAF for

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compliance with County Purchasing policies and procedures and will notify the requestor whether or not to proceed with the purchase.

#### **205.5 PURCHASE AUTHORIZATION FORM EXCEPTIONS**

When making certain purchases that are exempt from the PAF requirement, alternative procedures related to purchasing authorization shall be followed.

##### **205.5.1 COURT ORDER**

Purchases that are ordered by a court of law do not require any other form of authorization. To make such a purchase, the court minutes reflecting the purchase mandate shall be obtained and submitted to the FSD with the request for payment. The FSD will then redact all private information from the court minutes and submit the voucher package to the Auditor-Controller's Office for payment.

##### **205.5.2 BOARD ITEM**

Purchases that are approved by the County Board of Supervisors do not require any other form of authorization. A copy of the approved Board item should be submitted to the FSD with the request for payment.

##### **205.5.3 AUTHORIZATION FOR OUTSIDE TRAINING AND TRAVEL**

The Authorization for Outside Training and Travel form (AOTT) serves as the authorization form for travel and training. Instruction for completing the AOTT form can be found in the Employee Travel Actions/Submission of Expense Claims policy.

##### **205.5.4 SERVICE AND PRINTING SERVICES REQUISITIONS**

Per County Purchasing policy, departments are restricted from purchasing items or services normally available through Supply Services or Printing Services without first consulting with Supply Services or Printing Services on the unique requirements.

Each division is responsible for designating individuals responsible for supply and printing orders; the designated employee will then obtain access to the Supply Services Webstore. Each designated person shall complete a Security Access Form and have the form signed by their supervisor. The completed form should be submitted to the FSD Purchasing Unit for approval.

After receipt of a Security Access Form, County Purchasing will contact the access requestor and provide a user ID and password for access to the Webstore.

When making a purchase through Webstore, the designated employee should create an order in Webstore and print a draft to be approved and signed by his/her manager. Once the draft order is approved and signed, the designated employee will proceed to complete the order in Webstore. A copy of the signed draft and signed packing slips should be forwarded to the FSD Purchasing Unit.

The FSD Purchasing Unit will review and reconcile all packing slips to the payment journal on a monthly basis.

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### 205.5.5 EQUIPMENT/PROGRAM REQUESTS

All requests for equipment (capital asset, vehicles, etc.) should be submitted on the Equipment Request form. Forms should be completed by the Division Director or designee and routed for necessary approval (Chief Deputy, Assistant Chief, and then Chief). Requests should be submitted to the FSD no later than the last business day in February for inclusion on the upcoming budget year. Vehicle requests have to be approved on a Board item prior to the actual purchase made by Fleet Services.

Date(s) revised: 04/06/2016

Created: 01/13/2011

Attachments:

1. [Purchase Authorization Form](#)



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## Purchase Request Approval Form

### Services/ Supplies

Request for: \_\_\_\_\_ Division: \_\_\_\_\_ Date: \_\_\_\_\_  
 Location: \_\_\_\_\_ Program: \_\_\_\_\_ Dept. ID: \_\_\_\_\_  
 Site Contact: (Name) \_\_\_\_\_ Phone #: \_\_\_\_\_ Date Want: \_\_\_\_\_  
 Suggested Vendor: \_\_\_\_\_

Description Of Item	Qty.	Unit Price	Estimated Total Cost
1			\$ 0.00
2	1		\$ 0.00
3	1		\$ 0.00
4	1		\$ 0.00
5	1		\$ 0.00
6	1		\$ 0.00
7	1		\$ 0.00
Subtotal			\$ 0.00
Tax			
Shipping & Handling			
Installation Charge			
<b>TOTAL COST</b>			<b>\$ 0.00</b>

### Purchase Justification

\_\_\_\_\_

### Accounting Information

Funding Source/Project: \_\_\_\_\_ Rush: Yes  No   
 Fund: 10000 \_\_\_\_\_ Acct: \_\_\_\_\_ Rush Justification: \_\_\_\_\_

Manager Approval: \_\_\_\_\_ Date: \_\_\_\_\_

### Purchasing Use Only

PO Required:  Yes  No  
 Contracted Vendor?  Yes  No If yes, Contract #: \_\_\_\_\_  
 Bid/Quote Required?  Yes  No  
 Sole Source Justification Required?  Yes  No

Vendor: \_\_\_\_\_ Vendor Code: \_\_\_\_\_ PO#: \_\_\_\_\_

Comments: \_\_\_\_\_

Buyers Signature: \_\_\_\_\_ Date: \_\_\_\_\_  Approved  Denied