



PTO Purchase Request Process

*Requests for purchase must be approved **prior** to purchase.*

- Employee fills out PTO Purchase Request Form. Employee must fill in justification for request, details of item, including cost.
- Employee turns in Purchase Request Form to Principal, who will review the PTO Purchase Request Form for approval.
- If the Purchase Request is approved, the principal signs and returns the form to the Business Manager, who will electronically send to PTO Treasurer to ensure that the item is budgeted. The Business Manager will keep the form until the purchase process is completed.
- If the PTO Treasurer and PTO Board approve the request, the Treasurer will sign the form and electronically send the approval to the Business Manager, who will notify the requester of the status of the request. If approved, the Business Manager will either purchase or let the requester know that the purchase can be made.
- When the item is received by the requester, the invoice and shipping/packing receipt is submitted to the Business Manager, who will attach to the Purchase Request Form.
- Business Manager will code and process the payment to the Parish Bookkeeper.
- Business Manager will confirm payment and transactions completed with the PTO Treasurer.
- If the actual cost exceeds 10%, a written justification for the increased price must be submitted to the principal and PTO for approval.

Sacred Heart Academy PTO Purchase Request Form

Name: _____ Date: _____

What item(s) would you like to purchase? _____

How will this enhance instruction? _____

Vendor Name: _____

Vendor Address: _____

Vendor Email Address: _____

Vendor Phone/ Number: _____

Item Number	Item Description	QTY	Unit Cost	Total Cost

Subtotal:
Tax:
Shipping:
Total:

Principal: _____ Date: _____ Budget Code: _____

Approved: _____ Not Approved: _____

PTO Treasurer: _____ Date: _____

Approved: _____ Not Approved: _____

Date Order Placed: _____ Purchaser: _____

Payment Type: Reimbursement PO SHA Credit Card Check Request

Date Payment Processed: _____

Additional Notes:

Make Check Payable To:

Mail Check To: