



THE VIRGIN ISLANDS DEPARTMENT OF EDUCATION
PROCUREMENT POLICY AND PROCEDURE

Policy/Procedure Title:	PRO 2.6 Managing Open Purchase Orders
Purpose:	This procedure establishes guidelines for managing open purchase orders.
Abbreviations:	PO - Purchase Order VIDE - Virgin Islands Department of Education
Policy:	<ol style="list-style-type: none"> 1. Outstanding Purchase Orders over 45 days will be reviewed for Cancellation by the Procurement Director 2. A Purchase Order Modification Form must be used to Modify or Cancel a Purchase Order or Purchase Order Line Item. 3. All vendor contact attempts, contacts, and responses are documented and tracked in the PO Management database.
Procedure:	
<ol style="list-style-type: none"> 1. PO Management team updates the PO Management database with newly converted PO's. 2. The PO Management team will make initial contact with vendors or appropriate VIDE staff (ie. Reimbursement /travel and sub grantee PO's) to ensure: <ol style="list-style-type: none"> a. The PO was Received b. The PO can be fulfilled c. The anticipated date that the PO can be fulfilled 3. PO Management team analyzes the open Purchase Orders to determine district, age, and classification (Reimbursement, Sub Grant, Service, or Goods). <p>Open Reimbursement Purchase Orders</p> <ol style="list-style-type: none"> 4. PO Management prepares an aging report of all open reimbursement Purchase Orders and sends the report to the respective STTJ and STX Business Offices and cc's the Federal Grants Director for fiscal and programmatic monitoring purposes. This report will be submitted by the 5th of each month <p>PO Management</p> <ol style="list-style-type: none"> 5. PO Management looks in MUNIS Purchase Order Inquiry to determine if there is still a 	



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balance on the Purchase Order.

6. PO Management prepares an aging report of all open sub grant Purchase Orders and sends the report to the Contract Specialist and cc's the Federal Grants Director for fiscal and programmatic monitoring purposes.
This report will be submitted by the 5th of each month

Open Services Purchase Orders

7. PO Management looks in MUNIS Purchase Order Inquiry to determine if there is still a balance on the Purchase Order.
8. PO Management contacts the Vendor and the VIDE Program Manager to determine:
 - a. The PO was received
 - b. The PO can be fulfilled
 - c. The anticipated date that the PO will be fulfilled
 - d. The next follow up date based on responses
9. PO Management prepares an aging report of all open service Purchase Orders and sends the report to the Contract Specialist.

Open Goods Purchase Orders

15. PO Management looks in MUNIS Purchase Order Inquiry to determine if there is still a balance on the Purchase Order and to determine if any or all of the line items on the PO are received.

Aged Purchase Orders 30-45 days old

16. The PO Management team will look in MUNIS Purchase Order Inquiry to determine if there is still a balance on the Purchase Order and if any of the line items on the PO are received. If there are some items not received, make contact with the Vendor to determine the following:
 - a. The remaining lines on the PO can be fulfilled
 - b. The anticipated date that the PO will be fulfilled
 - c. The next follow up date
17. If goods are received in MUNIS, contact vendor to make sure an invoice was submitted to Centralized Procurement mailbox.
18. The PO Management team will continue to contact vendor and request tracking information for items that have been shipped but not received in MUNIS. If tracking information shows that items were delivered to the warehouse, contact warehouse to determine the receiving status.
19. Determine if any goods are on backorder and find out anticipated fulfillment date.



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20. If goods are on backorder and the anticipated fulfillment date is not within an acceptable time frame, contact 2nd quote vendor and 3rd quote vendor, respectively, to see if they are able to provide the item at the same quoted price and in a more reasonable timeframe.
21. If it is determined to go with the 2nd or 3rd quoted vendor, the VIDE Procurement Office needs to communicate in writing to the original vendor the items that are being canceled. Attach documentation to MUNIS Purchase Order Inquiry.
22. The Procurement Director notifies the Buyer and Program Manager of the change in vendor and completes a PO Modification form to cancel the portion of the PO that was not fulfilled.

EXHIBITS:

- Creating PO Management Database
- PO Modification Form