

PURCHASE OF OCCUPATIONAL TOOLS, EQUIPMENT, SUPPLIES, AND COMMODITIES

No counselor will commit the Department to the purchase of any tools, equipment, and/or supplies until it has been determined that:

Tools, equipment, etc. are absolutely essential for the job and not routinely furnished by the employer to other employees performing the same job.

Financial need has been established;

Comparable benefits are not available;

If the decision is made to purchase tools for an individual, the counselor should:

- Request individual to provide a detailed description and approximate price of requested items.
- Contact the System Management Branch to determine if any or all of the items are available from Department inventory.
- If items are not available from Department inventory, contact the Finance Branch to determine if the items are on contract.
- If items are not on contract but are under \$3,000, compare prices and if feasible authorize to the vendor with the lowest price on goods of comparable value.

No counselor will commit the Department to purchase tools, equipment, etc. over the Department limit of purchase (\$3,000) without bids. If the purchase is over \$3,000, the counselor must consult with the Field Administrator, and they must be in agreement that the purchase is necessary.

- The list of items to be purchased will be listed on a nonpay-authorization and submitted to the Field Administrator along with two copies of the IPE justifying the request with strong emphasis on the necessity of the purchase and how it is to be used by the individual. If approved, the Field Administrator must sign the IPE and the district office copy of the authorization and submit to the Finance Branch.
- A listing of items to be purchased with sufficient description for ordering must be attached and will include: budget unit number, delivery address, estimated cost and specifications. The specifications must be explicit since they will be used to write the requisition that will be sent to the Division of Purchases and should include: model numbers, dimensions, branch, pictures, etc. Additionally, the name and address of the vendor who provided the specifications must also be shown. Contact the Central Office Finance Branch immediately if there is need for correction of errors.

- When the bid is awarded, the counselor will receive a copy of the purchase contract showing the exact cost and the vendor. The counselor will prepare a nonpay Authorization for Goods and/or Services. The delivery address should be designated to the counselor's office address, except for large, heavy equipment.
- Upon delivery, the counselor must verify against the purchase contract prior to or at delivery of equipment to the individual.
- When all materials on the purchase contract have been received, the counselor will date and send the copy of the purchase contract, marked received, and the signed Receipt/Trans Agreement to the Financial Management Branch in Central Office. Central Office will then pay the vendor.

RECOVERY AND TRANSFER OF TOOLS, EQUIPMENT AND SUPPLIES

Transferable items, such as tools, equipment and supplies will be recovered by the Counselor if, prior to depreciation or prior to expiration of lien, the individual ceases to use the equipment for the pursuit and practice intended or upon death of the individual.

When transferable items are recovered, complete the Equipment Recovery Form and send to Systems Management Branch, Central Office. Recovered equipment will be unassigned from the consumer who turned in the equipment and will be maintained on an Available Inventory List, which will be made available to all staff.

Recovered equipment may be transferred to another consumer if a determination has been made that the consumer is in need of the equipment. A request should be directed to the Systems Management Branch. The counselor will be notified as to the availability of the requested equipment and the location, if applicable. If the counselor decides to pick up the equipment for their consumer, the Systems Management Branch should be notified to complete the transfer of equipment.

Copies of applicable forms should be filed in consumer's file.