

Instruction Document:

**Requesting a PO for 3rd Party Services**

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| Document Number: Instruction Document – Requesting a PO for 3rd Party Services | Revision No: 000 | Approval Date: April 17, 2017 |
| Name and Position of Document Approver: Colin Fraser, Lead - Logistics | | |

# Purpose & Scope

* This Instruction Document outlines the minimum requirements that must be met when requesting a PO for 3rd party services such as hot shots or bin moves.

# Roles & Responsibilities

The Instruction Document activities described below must be completed by competent personnel. Every effort has been made to ensure the accuracy and reliability of this information.

1. Implementation

* The Lead - Logistics provides direction to Coordinators and provides resources to allow consistent rollout, training, implementation, and evaluation of all procedures; as well as ensuring implementation of this Instruction Document.

1. Supervision

* The Coordinator team performs the activities of this service under the supervision of the Lead - Logistics.

1. Risk Management

* The Lead - Logistics oversees requirements for the communication, implementation and monitoring of this Instruction Document. It is the responsibility of the Lead - Logistics to assess operations against documented processes.

1. Other (if applicable)

| TASK | STEPS | notes/hazards/  comments |
| --- | --- | --- |
| pre-job preparation | | |
| Preparation  C:\Users\mthomas\Desktop\WORK INST\ICONS + LOGOS\PREPARE.jpg | 1. Ensure that this 3rd party service is necessary, and can’t be covered in a more efficient manner by Sanjel employees. |  |
| Tools/Equipment Required  Description: Gartoon-Gnome-desktop-config | Ensure that you have the following items before you begin:   1. Sanjel’s Preferred Vendors List 2. Dispatch shared email 3. Internet and phone access | All coordinators should have the ability to send and receive e-mails from their respective dispatch’s shared e-mail account. |
| instruction DOCUMENT | | |
|  | 1. Call the required vendor to confirm availability of services, and communicate our needs to them. Request an hourly rate, estimated time frame, and contact information for the vendor. | Contact information includes name, phone number, and a valid email address. |
|  | 1. PDF the call sheet and send via email, to the following: 2. Vendor 3. DSLM 4. Team Leads 5. District Admin 6. Purchasing@sanjel.com |  |
|  | 1. Include the following information in this email:   A) Description of job  B) Hourly rate of vendor  C) Estimated hours to be charged  D) District to be charged  E) Vendor’s contact information  F) Instructions for the vendor to send a final invoice to [Purchasing@sanjel.com](mailto:Purchasing@sanjel.com), with the PO clearly displayed on the invoice. |  |
|  | 1. The district should “receive” the PO once the services are performed. Send all payment inquiries to purchasing@sanjel.com. | PO’s will only be created during business hours. Purchasing will deal with all after hours requests on the next business day. |

If there any requests or discrepancies are found in this instruction document, please complete an MOC (if required) and email [Instructions@sanjel.com](mailto:Instructions@sanjel.com) to review.