

EOTA – Business Process



Document Title:

Procurement Process

Document Number:

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Referenced Document(s):

ISDP-002 Training Production Process, REG-002 External Document Register, ADMP-002 Vendor Selection and Management Process, ADMF-001 Purchase Authorization, ADMF-002 Government Purchase Transaction Worksheet, ADMF-016 Approved Vendor List, ADMP-003 Receiving / Inspection Process, Prime Contractor Purchase Order (external document), ADMF-003 Purchase Order Log, ADMF-004 Purchase Authorization Log, Blanket Purchase Authorization Memo

Revision History:

Rev.	Description of Change
A	Initial Release
08_1110	Added reference to ADMF-016, EOTA Vendor List which includes common EOTA vendors and the “Do Not Use” list. Changed verbiage and flowchart to reflect process and include new form. Changed document owner and back-up owner.
08_1118	Changed Administrative Assistant/AA to Online Learning Support Specialist/OLSS to reflect current process.
09_0325	Significant changes to incorporate use of Government Purchase methods and increase FMT role in procurement
09_0903	Modified process to coincide with new Procurement Process directives.
11_0203	Updated Reference Documents, reworded Item 2.0 and Item 3.2 to reflect FMT, not OLSS to maintain denied PA documents

I. Purpose

Define the process for procurement of products and services.

II. Scope

This process applies to the employees (Requestor) requesting products or services, the Program Manager, Federal Management Team, and Online Learning Support Specialist.

III. Responsibility

Federal Management Team (FMT) – Responsible for the review, approval, and determination of procurement method for all requested products/services regardless of cost. Responsible for the procurement of products and services when the Government Purchase Card (GPC) or other government procurement method is identified as the appropriate purchase method.

Program Manager (PM1)/Designee – Responsible for the review of all submitted ADMF-001 Purchase Authorizations. Requests determined to be appropriate will be forwarded to FMT for review/approval determination.

Online Learning Support Specialist (OLSS) – Responsible for the coordination and/or processing of ADMF-001 Purchase Authorizations, ADMF-002 Government Purchase Transaction Worksheets, and Prime Contractor Purchase Order forms. The OLSS will also maintain ADMF-004, Purchase Authorization Log.

Requestor – Working in concert with the OLSS, responsible for completion of procurement information on Purchase Authorization, Government Purchase Transaction Worksheet or Prime Contractor Purchase Order, for products/services requested based on a requirement to complete work under the EOTA contract.

IV. Definitions

ADMF-001, Purchase Authorization (PA) – form used to record the purchase requirements, vendor information, and associated approvals for all requested procurements exceeding \$25.00.

Prime Contractor Purchase Order (PO) – External document that identifies the authorized Prime Contractor purchase requirement(s) communicated to the vendor for procurements accomplished through Prime Contractor funds with government invoiced reimbursement.

ADMF-002, Government Purchase Transaction Worksheet – EOTA form that identifies the authorized purchase requirement(s) communicated to the vendor for procurements accomplished through use of the Government Purchase Card Program.

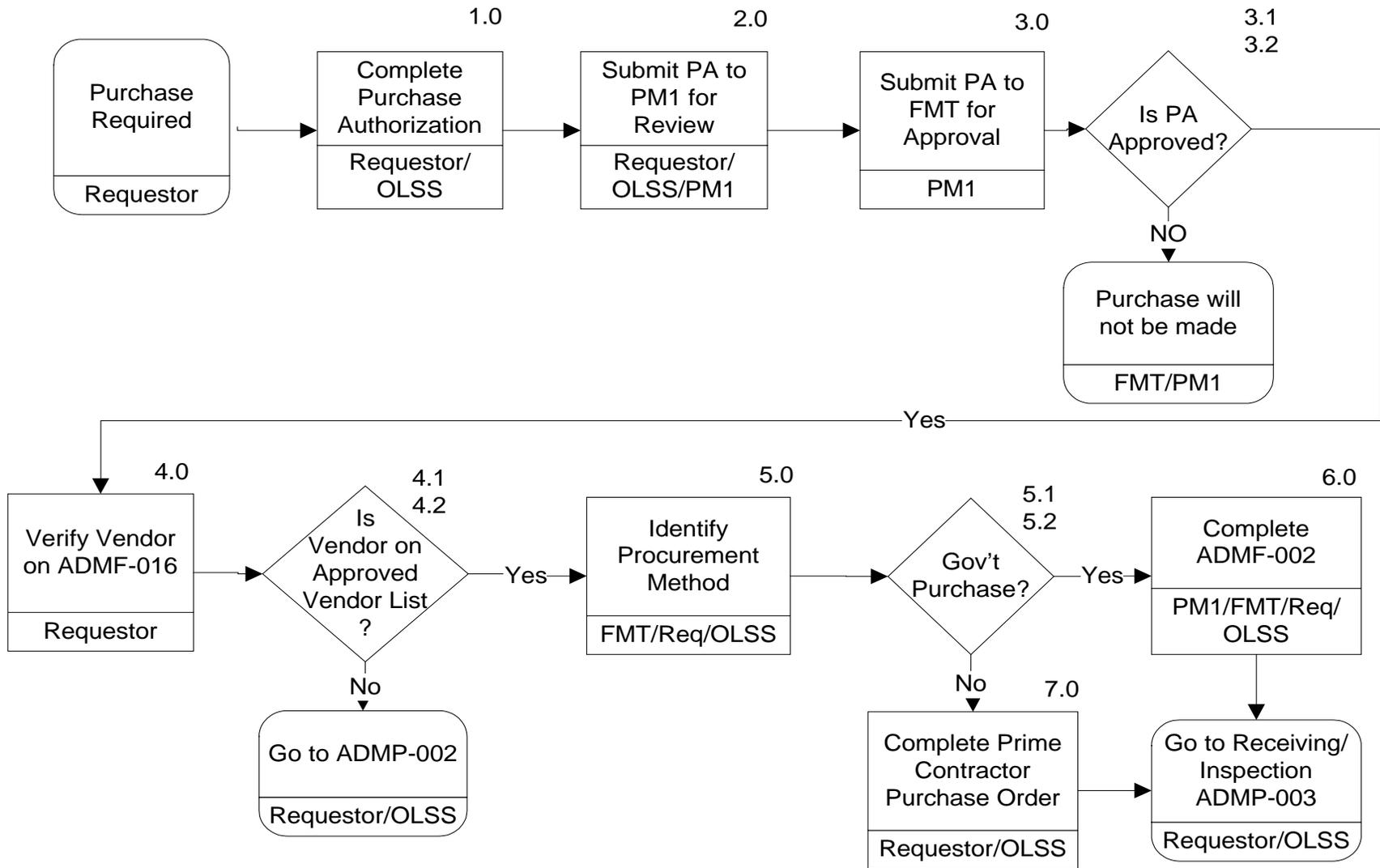
DOE/NNSA Procurement –Purchase made utilizing one of the procurement methods available through the support of the Albuquerque Service Center Procurement process, (i.e. Funding Memo, DOE Procurement Request). These transactions are coordinated through federal government contracting and managed by the FMT.

Government Purchase Card (GPC) – Procurement method using the GPC to purchase products/services. All GPC transactions will be executed directly by the FMT and include a requirement to select vendors based on specific criteria.

Blanket Purchase Authorization Memo – General, varied format memorandum from the FMT identifying specific vendors or product/service categories which have been reviewed by management. This memo verifies that execution of purchase can be accomplished for these vendors or product/service categories without the need to complete ADMF-001, Purchase Authorization.

GSA Approved Vendors – General Services Administration approved vendors, a listing of vendors approved for use by government managed organizations. These vendors can be viewed at <http://www.gsa.gov/Portal/gsa/ep/home.do?tabId=0> .

Process





1.0 Complete Purchase Authorization

Upon identification of the need for a product or service-related purchase, the Requestor will complete form ADMF-001, Purchase Authorization, unless there is a Blanket Purchase Authorization Memo on file for the selected vendor. If the purchase is addressed through a Blanket Purchase Authorization Memo the Requestor will proceed to step 5.0. Existence of this memo for specific vendors is identified on ADMF-016, EOTA Vendor List. The OLSS will assign a PA number to the completed PA and create an entry for the PA on ADMF-004, Purchase Authorization Log.

2.0 Submit Purchase Authorization to PM1 for Review

The Requestor/OLSS will submit the completed Purchase Authorization to the PM1 for review. If the purchase is determined to be appropriate and applicable to contract requirements the PM1 will forward the Purchase Authorization for FMT action. If the purchase is not appropriate the PM1 will document justification on the disapproved PA and instruct the requestor/OLSS to cancel the request in ADMF-004, Purchase Authorization Log.

3.0 Submit Purchase Authorization to FMT for Approval

The PM1 will submit the Purchase Authorization to the FMT for review and approval/disapproval action.

3.1 If the FMT approves the PA, the FMT will coordinate all remaining approvals as applicable and proceed to Step 4.0.

3.2 If the FMT does not approve the PA, the FMT will document justification on the disapproved PA, notify the PM1, and the purchase will not be made. Disapproved PA documents will be retained by the OLSS for the term of the contract.

4.0 Verify Vendor on ADMF-016

The Requestor will verify that the vendor approved on the Purchase Authorization is identified on ADMF-016, Approved Vendor List (AVL). If a vendor is listed in the “Do Not Use” section of ADMF-016, coordinate with the PM1 and FMT to utilize one of the alternate vendors from the approved ADMF-001, Purchase Authorization, or return to step 1.0.

4.1 If the vendor is on the AVL, the Requestor will proceed to Step 5.0.

4.2 If the vendor is not on the AVL, the Requestor will go to ADMP-002, Vendor Selection and Management Process.

5.0 Identify Procurement Method

The FMT will annotate the procurement method to be used on the approved Purchase Authorization and return the approved PA to the requestor/OLSS. Based on the product/service to be purchased the method will either be procurement using the Government Purchase Card, DOE/NNSA Procurement, or procurement through funds expended by the Prime Contractor and invoiced to the Federal Government through the active EOTA contract.

5.1 If the procurement will be through GPC purchase or DOE/NNSA Procurement the requestor/OLSS will proceed to Step 6.0.

5.2 If the procurement will be through the Prime Contractor the requestor/OLSS will proceed to Step 7.0

6.0 Complete ADMF-002

The requestor/OLSS will complete ADMF-002, Government Purchase Transaction Worksheet. The document will then be submitted through PM1 to the FMT for additional documentation and action. If the purchase method required involves DOE/NNSA Procurement, the FMT will coordinate the purchase with the assistance of a DOE/NNSA Contracting Officer. Information for all FMT executed purchases will be managed by the FMT using applicable data management tools, (i.e. spreadsheet, database, hardcopy files, etc...).

All vendors associated with procurement through Government Purchase Card or DOE/NNSA Procurement must be checked against the government's "Excluded Parties List System" (www.epls.gov). If the selected vendor appears on the Excluded Parties List System coordinate with the PM1 and FMT to utilize one of the alternate vendors from the approved ADMF-001, Purchase Authorization or return to Step 1.0.

7.0 Complete Prime Contractor Purchase Order

The OLSS will complete the applicable Prime Contractor Purchase Order form(s). Completed documents will be processed in accordance with Prime Contractor requirements and copies will be retained for EOTA reference for the term of the contract. Prime Contractor Purchase Order information will be managed by the OLSS using applicable data management tools, (i.e. spreadsheet, database, hardcopy files, etc...).

Upon product/service receipt, the Requestor will use ADMP-003, Receiving/Inspection Process.