

# + *EOTA – Business Process*



*Document Title:*

**Receiving / Inspection Process**

*Document Number:*

**ADMP-003 Rev. 11\_0203**

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*Parent Document:*

**Q-001, Quality Manual**

*Notify of Changes:*

**EOTA Employees**

*Referenced Document(s):*

**Prime Contractor Purchase Order, ADMF-002 Government Purchase Transaction Worksheet, ADMF-005 Expense Payment Log, MGTP-003 Control of Customer Property, P-011 Nonconforming Material Process, ADMP-001 Procurement Process, MGTP-005 EOTA Inventory Process**

**Revision History:**

<b>Rev.</b>	<b>Description of Change</b>
<b>A</b>	Initial Release
<b>B</b>	<b>Added option for receiver to initial or sign PO/Packing Slip</b>
<b>08_0520</b>	<b>Edited text within process for clarification</b>
<b>08_1119</b>	<b>Changed Administrative Assistant/AA to Online Learning Support Specialist/OLSS to reflect current process.</b>
<b>08_1217</b>	<b>Modified process to reflect current process for receiving and inspection. Process modified to include MGTP-005, EOTA Inventory Process (new process).</b>
<b>09_0320</b>	<b>Modified process to better fit receiving and inspection process. Process modified to reflect changes to MGTP-005, EOTA Inventory Process.</b>
<b>09_0330</b>	<b>Modified process to add elements related to changes to the Procurement Process; addition of FMT involvement and use of ADMF-002</b>
<b>10_0419</b>	<b>Modified process to add elements related to changes to the Procurement Process</b>
<b>11_0203</b>	<b>Updated reference list. Reworded OLSS and Requestor/Designee responsibilities.</b>

## **I. Purpose**

To establish and implement the inspection or other activities necessary for ensuring that purchased material / product / service meets specified purchase requirements. In addition, the contractor will exercise care with customer property while it is under the control of, and being used by the contractor or its sub-contractors.

## **II. Scope**

This process applies to EOTA employee receiving and inspecting material or confirming provided services.

## **III. Responsibility**

**Program Manager (PM1)/Designee** – Responsible for the review, authorization, and coordination of payment of invoices for all purchases made using Prime Contractor Purchase Orders.

**Federal Management Team (FMT)** – Also referenced as the Purchase Card Holder, responsible for payment of invoices for all purchases made using ADMF-002, Government Purchase Transaction Worksheet.

**Online Learning Support Specialist (OLSS)** – Responsible for managing the PO and Expense Payment Log (ADMF-005).

**Requestor/Designee** – In conjunction with the OLSS, complete, perform and record inspection acceptance of material and forward the invoice for payment.

**The Property Custodian/Designee (PC)** – Responsible for entering data into the EOTA Inventory Control Database.

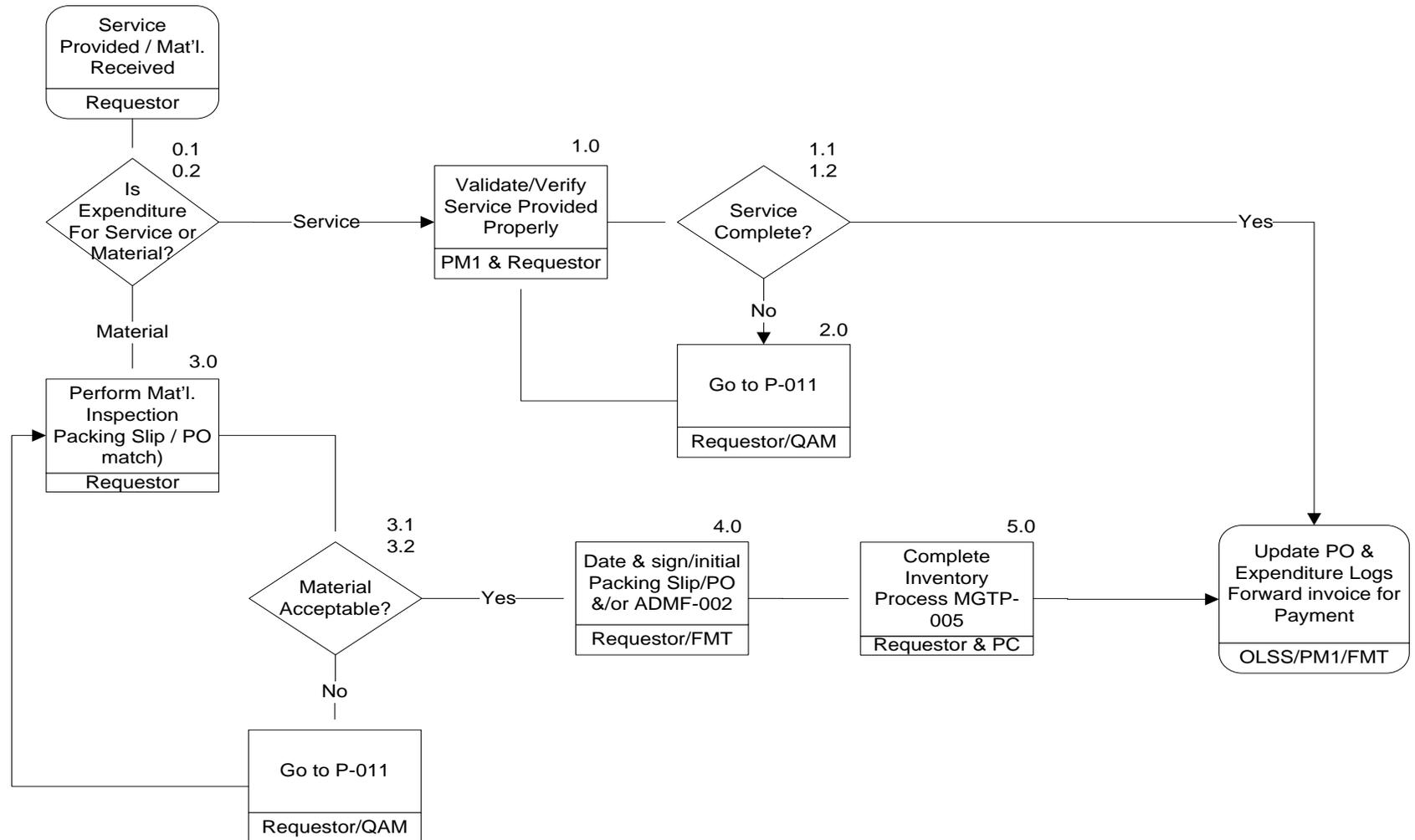
**Quality Assurance Manager (QAM)** – Assists with completion of Nonconforming Material/Product Process.

#### **IV. Definitions**

**NNSA/DOE Procurement** – Any purchase made through FMT coordination with DOE/NNSA procurement resources. These purchases will be accomplished using DOE Procurement Request processes, funding Memorandums or other applicable DOE methods.

**Packing Slip** – Receipt identifying package contents utilized to validate items received if no PO available.

# Process





Upon service/material/product receipt, an immediate determination is made to categorize how validation/verification is performed. Any service/material received as a result of NNSA/DOE procurement processes will be received, inspected, and managed directly by the FMT.

- 0.1 If service has been provided, go to Step 1.0.
- 0.2 If material/product has been received (i.e. order has been received), go to Step 3.0.

### **1.0 Validate/verify that Service was provided/completed properly**

- 1.1 If service has been properly provided, the Program Manager or FMT and Requestor will submit invoice to OLSS for processing.
- 1.2 If service was not properly provided, the Requestor will go to Step 2.0.

### **2.0 Go to P-011, Nonconforming Material/Product Process**

Requestor will go to go to P-011, Nonconforming Material/Product Process and complete F-015, Nonconformance Report for this vendor. Upon completion of F-015, Nonconformance Report, the Requestor will attempt to resolve issue with the service and then return to Step 1.0 upon receipt of final delivery of services.

### **3.0 Perform Material Inspection (Material/Packing Slip/P.O. match)**

Regardless of who initially receives the product, the original requestor will inspect materials received against the original order to verify order was filled properly, this inspection should occur as soon as possible after receipt of material.

- 3.1 If the material is acceptable, the Requestor will go to Step 4.0
- 3.2 If the material is not acceptable, the Requestor will go to P-011, Nonconforming Material/Product Process and complete F-015, Nonconformance Report for this vendor. Upon completion of F-015, Nonconformance Report, attempt to resolve issue with the order and then return to Step 3.0 upon receipt of final delivery of material/product.

#### **4.0 Date & Sign/Initial Packing Slip/PO &/or ADMF-002**

The requestor will annotate the date received on the packing slip or PO and sign or initial as evidence of the acceptance of the material. The signed/initialed packing slip/PO is to be given to the FMT. For material/services requiring the use of ADMF-002, Government Purchase Transaction Worksheet, the requestor and Purchase Card Holder (FMT) must sign the ADMF-002 verifying proper delivery of product or service.

#### **5.0 Complete Inventory Process, MGTP-005, EOTA Inventory Process.**

MGTP-005, EOTA Inventory Process will provide specific detail for the requestor to work with the PC/Designee assigned to input items into the EOTA Inventory Control Database.

#### **Note:**

The OLSS will update PO and Expenditure Log and forward the invoices for payment. For purchases accomplished using the Prime Contractor Purchase Order the invoice will be forwarded through the Program Manager to the Prime Contractor for processing and payment. For purchases accomplished using ADMF-002, Government Purchase Transaction Worksheet, the invoice will be forwarded to the FMT for processing and payment.