

TEMPORARY CHANGE REQUEST

TCR NO. TCR-MC-011,R2-002

(e.g., TCR-ENG-021,R0-001)

The Temporary Change Request (TCR) Form is to be used to process urgent or minor changes for PPPL Policies, Organization/Mission Statements and Procedures. The TCR should be used when changes are:

- 1) urgent, and can not wait the 2-4 week period for Department Head review/comment, or
- 2) minor, and do not warrant Department Head review.

Person Requesting Change: Fran Cargill

Phone Ext: 3396

Department Name: ES&H

Document Number: MC-011

Revision No.: 2

Document Title: Requisition of Office Materials & Supplies

Reason for change:

1. Updated Management System
2. Minor formatting changes
3. Updated Reference Documents
4. Minor updates to System links and process
5. Added Training
6. Added Records Requirements

Change description: (Summarize and attach changed pages, with changes clearly indicated)

See attached

1. Does this TCR significantly alter the intent or scope of the document? YES: NO: X

2. Does this TCR significantly impact **ES&H**? YES: NO: X

If 1 or 2 is **YES**, Explain why the changes should not be routed for Department Head review:

Rob Sheneman
Department/Division Head Approval

8/5/16
Date

John DeLooper
Head, Best Practices and Outreach/designee

8/16/16
Date

Release/Effective date of this TCR: 9/7/16

Incorporate this TCR into next revision of this document?

YES: X NO:

Subject: Requisition of Office Material and Supplies	Effective Date: March 14, 2008	Initiated by: Head, Material Services Division
	Supersedes: MC-011, Rev 1 June 15, 2004	Approved: Director

TCR-MC-011, R2-002

Management System (Primary):	08.00 Facilities and Property Management
Management System Owner:	Head, Engineering & Infrastructure
Management Process:	08.01 Personal Property Management
Process Owner:	Deputy Head, Environment Safety & Health
Subject Matter Expert (SME):	Head Material Services

1. Applicability

This procedure is applicable to all Laboratory and PPPL subcontractor personnel who use the Office Material and Supplies Electronic Ordering System and PPPL Stockroom.

2. Introduction

The office material inventory consists of items commonly used in performing Laboratory related work. This material is procured through a subcontractor by the PPPL Requester on an "as needed" basis for Laboratory use.

One exception to using the electronic ordering system is for PPPL Office products located in Stockroom (e.g. PPPL letterhead paper, University watermark paper, return addressed envelopes, , picture frames 10x14 and 16x20 and office chairs). See procedure MC-010 for withdrawal of Stockroom items. Cost Center Manager approval is required for the withdrawal of office chairs and must be forwarded to Property Manager or Material Services Division Head prior to distribution of office chairs. This approval may be provided via e-mail.

This procedure defines PPPL actions to ensure that the on-line purchase of office material and supplies are properly documented and reviewed.

3. Reference Documents

PPPL Blanket Purchase Agreement BPA
41 CFR, Chapter 101, Subchapter E, Supply & Procurement
41 CFR, Chapter 109-27, Inventory Management
DOE Order 580.1A and Change 1, DOE Personal Property Management Program
Engineering & Infrastructure Departmental Records Inventory Schedule, current revision

4. Definitions

PPPL Requester	PPPL employee or subcontractor authorized to order Office Supplies through on-line Office System.
Authorized Cost Center Approver	PPPL cost center manager or individual designated with signature authority through on-line Office System.

Material Services
Stores Personnel

Material Services Division, Property Management Branch employee.

Accounting
Representative

Designated Accounting and Financial Controls Division employee.

Subcontract
Administrator

Procurement Division employee assigned subcontract.

Technical
Representative

Property Manager or Material Services Stores Personnel assigned subcontract.

5. Procedure

<u>Responsibility</u>	<u>Action</u>
PPPL Requester	<ol style="list-style-type: none"> 1. Logs on to PPPL’s on-line office material and supply ordering system on PPPL’s Home page at the following link; Office Supply System (CMF) or go to Material Services home page and left click on PPPL CMF Office Supplies Home Page (https://www.dforce2plus.com/1039B/Authentication/Login). Uses unique user name and password to enter system. Selects the appropriate cost center, work package and job number for the order or enters space for drop down to select appropriate cost center for order. Selects items to be purchased with a preference for cost-saving and environmentally preferred products. PPPL contract (or “core”) items are denoted with a “C” icon and environmentally preferred items are denoted with a recycling symbol or other icons as described in the on-line ordering system. When the order is complete, Requestor submits the order for approval and processing.
Authorized Cost Center Approver	<ol style="list-style-type: none"> 2. Receives e-mail notification of the pending order from on-line system. Logs on to PPPL’s on-line office material and supply ordering system using unique user name and password. Approver is capable of adding, deleting, and changing items and quantities on office material and supply order. Approves, modifies, or declines order as appropriate. 3. Notifies the Subcontract Administrator of any changes to the list of authorized system users or cost center approvers.
PPPL Requester	<ol style="list-style-type: none"> 4. Receives items from subcontractor and signs manifest or electronic delivery confirmation. 5. Verifies packing slip against items received and ordered. Informs subcontractor if there is known discrepancies. If discrepancy is not resolved within 3 business days, informs Material Services Stores Operations (x3573 or x2714) for assistance. Retains order documentation for 3 months.
Material Services	<ol style="list-style-type: none"> 6. Works with subcontractor to resolve discrepancies and provides feedback

Stores Personnel	to Requester. If unable to resolve issue, elevates the matter to Technical Representative and ultimately Subcontract Administrator for resolution, if subcontractor and Technical Representative cannot resolve.
Accounting Representative	7. Processes monthly invoice by reviewing delivery date/time, electronic delivery verification, and invoice detail report.
Subcontract Administrator	8. Working with subcontractor, maintains current list of authorized system users, Authorized Cost Center Approvers and delivery locations in the on-line ordering system. 9. Working with subcontractor and Technical Representative, assures that required reports (e.g. monthly transaction reports, delivery status reports, environmentally preferred purchasing reports, etc.) are provided by Subcontractor and distributed to appropriate PPPL personnel.

6. Training

Responsibility **Action**

Subcontractor and Technical Representative Ensures the following Training is provided.

Target Audience:

Laboratory employees, PPPL subcontractor personnel who are authorized to order and approve orders within the Office Supply System in the performance of official Laboratory work.

Training Method and Frequency:

- Initial Tutorial - Upon award of subcontract for new system
- Read only - Upon revision of procedure - Routine distribution/training via e-mail distribution of this procedure to Supervisors by Best Practices.
- Verbal/e-mail – Direction supplied on an as needed basis to perform Office Material and Supply ordering.

7. Records Requirements Specific To This Procedure

Records custodians must assure records are maintained as follows:

Record	Record Custodian	Location	Retention Time
Receipts	Recipient	Associated Division	Dispose 3 months after closed/expired. <i>Reference: A18 Security, Emergency Planning and Safety Records (12)</i>
Office Supply System	Subcontractor	Subcontractor	Delete with related records or when no longer needed for administrative, legal, audit, or operational purposes, whichever is later - A20 9

TCR-MC-011, R2-002

Reports, various	Associated Manager	Associated Division	Delete with related records or when no longer needed for administrative, legal, audit, or operational purposes, whichever is later - <i>A20 9</i>
------------------	--------------------	---------------------	---