

LBNL Facilities Division – Procedure LOGIS-001 *For Final Review*

Title: Central Receiving - E-Pro/P-Card Purchase Order Receiving

Application

Applies to LBNL Facilities personnel responsible for the receipt and documentation of material arriving at the Laboratory associated with a Procurement Department generated E-Pro/P-Card purchase order. Each receipt requires off loading, inspection, scanning, data entry and staging for delivery.

Purpose

All material arriving at the Laboratory must be received, inspected, documented and manifested prior to delivery by LBNL Transportation. Data entry into the Procurement FMS system must be performed by Central Receiving personnel for all items arriving at the Laboratory. It is the responsibility of the Central Receiving function to ensure that all items associated with an LBNL purchase order number are inspected and processed prior to delivery. The Central Receiving function will ensure that:

- All material arriving at the Laboratory will be inspected for damage
- All quantities and descriptions listed on the vendor packing list will be matched to the PO
- All required data will be entered into the LBNL Procurement PeopleSoft FMS System
- Material identified as “sensitive” or “equipment” will be received per the *LOGIS-003* Tagging Procedure
- All hazardous material(s) will be processed per Department of Transportation requirements

Definitions

E-Pro/P-Card requisitions are used to request unique goods and services that are not available from E-Buy or B2B vendors. Only trained E-Pro Requisition Preparers can create E-Pro requisitions. Requesters can fill-in and send an E-Pro requisition worksheet to a Requisition Preparer for processing. Once an E-Pro requisition is created, it is submitted to an Authorized Signer for approval. After approval, the requisition is routed to Procurement where it is assigned to a buyer who then issues a purchase order to a vendor for the goods or services. For vendors that only accept a credit card, Buyers are authorized to use a Procurement department provided P-card.

Scope

The scope of this procedure includes the following entities: LBNL Procurement, Property Management, Transportation and the EH&S Division. These groups work together to ensure the proper disposition of material being purchased and utilized by Lawrence Berkeley National Laboratory. All processes utilized for the procurement and receipt of material at LBNL are performed according to Department of Energy (DOE) and Department of Transportation (DOT) guidelines.



Roles & Responsibilities:

LBNL Requester

- Sends an E-Pro Requisition Worksheet to a Requisition Preparer for processing per LBNL Procurement guidelines (<http://www.lbl.gov/Workplace/CFO/pro/ePro/index.html>)
- *Note:* Only trained E-Pro/P-Card Requisition Preparers can create E-Pro requisitions.

LBNL Procurement Buyer

- Creates E-Pro and P-Card Requisitions for LBNL Divisions
- Orders equipment and materials to be used by LBNL employees
- Acts as point of contact for requesters

Central Receiving Material Handler

- Point of contact for freight carriers making deliveries to LBNL Central Receiving, Building 69
- Stages all material pre and post receipt
- Processes all material associated with a PO utilizing PeopleSoft software
- Receives and barcode tags equipment in accordance with LBNL Policy and Procedures
- Creates and maintains hard files at receipt location containing PO information

Central Receiving Material Specialist

- Acts as the prime point of contact for Central Receiving
- Determines disposition of material and paperwork if error/damage observed
- Provides guidance and direction to Material Handlers
- Coordinates non-routine deliveries with Transportation personnel

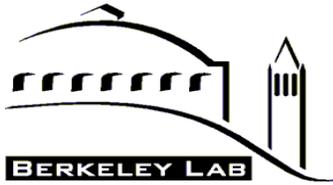
Technical Supervisor

- Provides line management to the Receiving, Transportation and Shipping functions
- Ensures staff compliance with all LBNL, DOE and DOT requirements
- Conducts safety meetings and coordinates training for Material Handlers and Drivers

(A) Procedure (Non-Hazardous/Common Material)

LBNL Procurement Buyer

- Receive requisition worksheet from requester
- Submit requisition to Authorized Signer
- Upon approval, Generate an electronic Purchase Order in the PeopleSoft FMS program
- Populate "Notes to Receiver" field in PeopleSoft if material requested is categorized as "sensitive" or "equipment"
- Use a Procurement card (P-Card) if credit card required by chosen vendor
- Provide requester with purchase order information upon request



Receiving Dock

- Verify that freight bill and shipping label reflect 1 Cyclotron Road as "deliver to" address
- Inspect material for damage; annotate on freight bill if damage observed
- Verify the material description and match quantity to driver's manifest
- Notify Supervisor if damage observed and/or discrepancies exist
- Stage material prior to receipt on pallets or on conveyor line in designated receiving area
- If package contains hazardous material, follow Hazardous Material Procedure B, below

Receipt of Material into PeopleSoft System

- Sign into PeopleSoft with screen name and password
- Verify description of physical material against description and quantity in PeopleSoft
- Verify material cost to determine if DOE Property tag required (*see LOGIS-003 Tagging Procedure*)
- Annotate on vendor supplied packing list the date, LBNL receipt number, requester name and delivery location
- "Save" information in PeopleSoft
- Place documentation in PO receipt file
- Stage Material for Delivery
 - Place large items on pallets
 - Avoid blocking egress locations
 - Place small packages (<25#) on designated Transportation delivery cart
 - Affix I-box generated address label to package (*see LOGIS-008, Exhibits, Exhibit A*)

Note: When materials or services are delivered directly to a Requester without going through Receiving, the Requester should forward the packing list to Receiving with a note saying that the materials or services were delivered and request that Receiving enter a receipt in the purchasing system.

(B) Procedure (Receipt of Hazardous Material)

Receipt of Hazardous Chemicals

- Inspect for damage and/or leakage
- Ensure a Material Safety Data Sheet (MSDS) is included with package (*see LOGIS-008 Exhibits, exhibit B*)
- Manifest material per DOE 49CFR guidelines (*see LOGIS-008 Exhibits, Exhibit C*)
- Receive Material in PeopleSoft
- Place material in designated HAZMAT area

Receipt of Radioactive Material (RAM)

- Place radioactive material container in hazardous materials cage
- Notify EH&S Radioactive Protection Group (RPG), at extension 6228 of package arrival
- Scan delivery into i-Box at time of pickup by EH&S
- Complete receipt in PeopleSoft per EHS/RPG Email notification



Receipt of Inhalation Hazards & Poisonous Gas

- Receive and scan purchase order information into the i-Box tracking database
- Tag material with LBNL barcode tracking label
- Complete HAZMAT Shipping Manifest per DOT 49CFR 172.0 and EH&S PUB 3000
- Place material in designated chemical segregation area
- Place white copy of Hazardous Material Manifest in Transportation office suspense file

Receipt of Select Agents (Regulated Microbial Agents)

- Receive Email from requester regarding order and expected arrival date
- Send confirmation Email back to requester
- Inform staff of pending receipt of agent (Material Specialist)
- Review work instruction for select agent package
- Contact authorized person to sign for package Ensure that courier is present when authorized person signs for package
- Complete Receiving Process

References

- LOGIS-002 – Central Receiving – E-Buy Procedure
- LOGIS-003 – Central Receiving Tagging Procedure
- LOGIS-008 Exhibits Book
- Receiving Training Documents
- EH&S PUB 3000
- LBNL Property Management System Plan
- LBNL Procurement Guide
- Department of Transportation 49CFR, 172.0

Contacts

Title	Name	Extension	Email
Site Logistics Supervisor	Kevin Haugh	5404	KTHaugh@lbl.gov
Material Specialist Receiving	Tim Montoya	4935	TJMontoya@lbl.gov
Receiving Admin.	Chris Debernardi	4935	CMdebernardi@lbl.gov
EH&S RAM Specialist	Steve Sohner	6228	SLSohner@lbl.gov
Select Agent Contact	Tamas Torok	5808	TTorok@lbl.gov
LBNL Property Management	Patrice Atases	5151	PDAases@lbl.gov

* Future automated links will be accessible from this Procedure Document