

<p>Region 4 U.S. Environmental Protection Agency Science and Ecosystem Support Division Athens, Georgia</p>	
<p>Operating Procedure</p>	
<p>Title: Purchasing Services and Supplies</p>	<p>ID: SESDPROC-1008-R0</p>
<p>Issuing Authority: Deputy Director, SESD</p>	
<p>Effective Date: October 1, 2017</p>	

Purpose

This Operating Procedure is specific to the Region 4 Science and Ecosystem Support Division (SESD) to maintain conformance to technical and quality system requirements. This procedure defines the process for purchasing of services and supplies whose properties could affect the quality of sampling, measuring and testing activities. This procedure also describes the process under which these services and supplies are evaluated for suitability.

Scope/Application

The requirements of this procedure apply to all personnel who perform work under the SESD Quality Management System (QMS). Purchasing of services can include, but are not limited to, equipment maintenance, repair, and certification. Purchasing of supplies can include, but are not limited to, chemical standards and reagents, sample containers, disposable sampling equipment, tubing and laboratory consumables. Whenever possible, services will be purchased from vendors that are accredited (i.e., ISO 17025). While this SOP may be informative, it is not intended for and may not be directly applicable to operations in other organizations. Mention of trade names or commercial products in this operating procedure does not constitute endorsement or recommendation for use.

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1.0 Procedure

1.1 Services

Purchases of services that affect the quality of field sampling and measurement/testing activities can be originated by any EPA employee. SESD purchases services through procurement requests, bank card orders and/or contracts. Regardless of the mechanism utilized to purchase a service, it is the responsibility of the originator to:

- Ensure funding is available for the purchase;
- Determine the specifications for the service;
- Establish acceptance criteria for use in evaluating the service; and
- Provide source recommendations to the purchasing official.

Upon completion of the purchasing documents by the originator, management will authorize the purchase by signing all applicable forms. The purchasing documents will then be routed through the equipment/system manager to ensure the vendor is an approved supplier. If the service is being provided by a new vendor, the equipment/system manager will obtain accreditation information from the new vendor and add this information to the list of approved suppliers. The equipment/system manager will then forward the documents to the purchasing official.

The originator of the service request will evaluate the provided service for suitability upon completion of the service. If deemed acceptable by the originator, based on the specification of the service request, an approval comment will be added to the approved supplier list, If the service is deemed unacceptable, the purchase originator will work in conjunction with the vendor and the purchasing official to correct the problems associated with the provided service.

1.2 Purchasing Supplies

Supply purchases are made using procurement requests (PR) or bankcard orders and can be initiated by any EPA employee. The originator of a purchase is responsible for preparing a PR or bankcard order form that specifies the correct name of the item, the relevant quality criteria of the item, the item number, a quote or price, possible sources and any other associated information that helps identify the correct item to be purchased.

Once the PR or bankcard order has been prepared, the information is forwarded to management, the Chemical Hygiene Officer(CHO), and finally to the equipment/system manager for approval and evaluation of vendor suitability, if applicable. The equipment/system manager will verify the vendor is an approved supplier. If the supplies are being provided by a new vendor, the equipment/system manager will obtain accreditation information from the new vendor and add this information to the list of approved suppliers. The equipment/system manager will then forward the PR or bankcard form to the purchasing official. The purchasing official will ensure the order is processed according to the information on the PR or bankcard order.

EPA staff will accept delivery of supply orders. For purchases received at the SESD laboratory, the equipment/system manager or originator of the order will inspect the items to ensure they comply with the purchase request or bankcard order. If the items are acceptable, the equipment/system manager or originator will sign and date the invoice that accompanied the order. For purchases received at the FEC, contract personnel may inspect the items to ensure they comply with the purchase order request. If the items are acceptable, the contract personnel will sign and date the invoice that accompanied the order. The signed invoice will be supplied to the purchasing official. If any supplies prove to be unsuitable for use, the equipment/system manager will document the issue. The equipment/system manager will compile all occurrences of unsuitable consumables, supplies or services and determine what further action may be necessary.

1.3 Purchasing Chemicals

For detailed procedures on chemical purchasing, receipt, storage and disposal, refer to SESD SOP for Maintaining Chemical Inventory.

For chemicals and standards that are stored at the Field Equipment Center (FEC) and used to calibrate field meters, the purchase request should be prepared by an equipment manager. These chemical standards will then be directly shipped to the FEC where they will be stored for use. Chemical standards and preservatives stored at the FEC are tracked using the Field Equipment Tracking System (FETS).

The Office of Quality Assurance requests standards from Headquarters for CLP labs. Chemicals will be received by OQA staff and stored in the designated area. Due to the small quantity and type of standards received, the chemicals are tracked separately by OQA staff and not entered into the laboratory chemical tracking software.

1.4 Identifying and Labeling Chemicals

The CHO and originator will ensure that chemical standards, reagents and reference materials are uniquely identified and correctly labeled. Labels on all chemicals will include the name, concentration, manufacturer or vendor, lot number, date received, date opened and expiration date. Specific hazard information for each chemical is addressed in its MSDS, which should be kept in the area in which the chemical is used.

Labels on stock and intermediate chemicals will show the chemical name, and either reflect or be traceable to its concentration by a unique ID, date opened/prepared or expiration date and preparers initials. Additional chemical hazard information is specifically addressed in the MSDS.

1.5 Verification of Supplies and Chemicals

SESD will ensure that supplies are not used until they have been inspected or otherwise verified as complying with SESD Quality Management System requirements. If supplies need to be released for use prior to being verified, the project leader/analyst will notify the appropriate System Manager and equipment manager (if applicable). The project leader/analyst will fill out SESDFORM-1017 (Quarantined Item Release Form) prior to taking supply items out of quarantine.

Verification of field supplies such as sample containers, disposable sampling equipment (e.g., COLIWASAs, bailers), latex gloves and tubing is conducted as described in the SESD Procedure for Field Sampling Quality Control (SESDPROC-011). The Field Services Branch Quality Assurance Officer is responsible for maintaining records of the results of the verification of sample containers, latex gloves and tubing.

All buffers/standards and reagents will be tested prior to use and the test results will be compared to those of similar materials from independent sources or lots for verification. Commercially available chemical preservatives will be tested as described in the Field Sampling Quality Control Operating Procedure (SESDPROC-011). A record of the tests and the results will be maintained at either the FEC or the SESD laboratory, depending on the storage location.

Verification of laboratory supplies will be conducted following ASB Operating Procedure 121G.

Suitability of routine supplies/reagents is documented through the analysis of laboratory method blanks performed unless method requirements indicate additional certification is required. Method blanks are performed prior to using supplies for routine sample analysis. A clean method blank documents that all reagents and supplies used in the associated batch were suitable for use. The acceptability is documented on the certificate of analysis or logbook. A contaminated method blank requires corrective action to determine whether the contamination is the result of unsuitable reagents, or contamination introduced in the sample handling process.

1.6 Records Management

Purchase request documents for services and supplies is maintained by the purchasing official. A list of certified suppliers for services and supplies is maintained by the branch equipment manager or appropriate systems manager. Certificates of Analysis for purchased standards will be maintained by the purchase originator in the location where the standards are stored.

2 Definitions

Branch Equipment Manager- Staff designated by management to be responsible for ensuring that the procedures for Equipment Inventory and Supply Management are followed. At least one Equipment Manager will be designated for the Enforcement Section and the Ecology Section in FSB. One Equipment Manager will be designated for the entire Analytical Services Branch.

Branch Quality Assurance Officer- Branch Quality Assurance Officers (QAOs) are designated by and report to the Section Chiefs in both field branches. The Branch QAOs assist the Field Quality Manager (FQM) in disseminating, reviewing and implementing the SESD field branches quality management system.

Buffer/Standard- A reference material whose properties have been established so that it can provide a level of performance verification.

Certificate of Analysis- A document issued by the manufacturer of a chemical reagent, standard or reference material that certifies its identity, concentration or purity.

Chemical Hygiene Officer (CHO)- An individual assigned by SESD management to monitor procurement and use of chemicals within SESD through a Chemical Inventory Program; also advises on the special handling and disposal requirements for chemicals.

Reference Material- A material with known analyte concentration and matrix type used to demonstrate that a measurement system is functioning.

Reagent- Any water, solvent, gas or chemical that potentially affects the outcome of environmental measurements.

Supplies- Any materials such as calibration standards, sample containers or disposable sampling equipment that potentially affects the outcome of environmental measurements.

Verification- Visual inspection and/or testing of supplies to verify consistency with labeling and/or certification.

3 References

Region 4 SESD Analytical Services Branch Laboratory Operation and Quality Assurance Manual, Most Recent version.

SESD Safety, Health and Environmental Management Program (SHEMP) Manual, Most Recent Version

SESD Operating Procedure for Equipment Inventory and Management, SESDPROC-108, Most Recent Version

SESD Operating Procedure for Field Sampling Quality Control, SESDPROC-011, Most Recent Version

SESD Operating Procedures for Maintaining Chemical Inventory, Most Recent Version

Analytical Services Branch Operating Procedure for Screening of Supplies, Most Recent Version

Quarantined Item Release Form, SESDFORM-015, Most Recent Version

SESD Bankcard Order Form

4 Revision History

This table shows changes to this controlled document over time. The most recent version is presented in the top row of the table. Previous versions of the document are maintained by the SESD Document Control Coordinator.

History	Effective Date
SESDPROC-1008-R0, Purchasing of Services and Supplies, Original Issue	October 1, 2017