

UNIT 3. PROCUREMENT DOCUMENTATION

LESSON 2: PROCUREMENT REQUEST (PR)

Contents

Unit 3. Procurement Documentation	2
Introduction	2
Lesson 1: Procurement Request (PR).....	3
Introduction	3
Lesson Structure	4
Knowledge Development: Procurement Request	5
Procurement Request Slides	6
Knowledge Development: Demonstration – Procurement Request	9
Practice: Procurement Request (PR).....	10
Assessment: Procurement Request (PR)	12

UNIT 3. PROCUREMENT DOCUMENTATION

Introduction

Unit Overview

This unit introduces the documentation you will need to complete before Procuring Foods for your CGDF.

- The Procurement Request (PR) defines your budget for the month and once approved, allows you to start purchasing food
- The Procurement Card Transaction Worksheet (DHS-1501), once approved, gives the cardholder permission to spend the money.

Unit Lessons

This unit has two lessons:

- Lesson 1. Procurement Request (PR)
- Lesson 2. DHS-1501

Unit Technology Requirements

This facilitated online training unit requires the student to have the following technology:

- milSuite account
 - Access to DCS (Defense Collaboration Services)
 - Personal Computer or USCG Workstation with:
 - Chrome Internet Browser
 - Adobe Flash
 - Email for correspondence
 - CAC card with CAC Reader connected to computer
 - Telephone with mute function (either personal cell phone or USCG Office phone)
 - Recommended: Headset with microphone and mute function
-

Lesson 1: Procurement Request (PR)

Introduction

Lesson Overview

This lesson describes the process of completing a Procurement Request form.

- NOTE: The name of the file on the CS Portal is “Procurement Authorization”, but it is referred to as the “Procurement Request”

Objective(s)

After this lesson, students should be able to:

- Given the Basic Daily Food Allowance (BDFA), CGDF monthly folder, a computer with access to the CS Portal, any relevant job aids and additional applicable references **COMPLETE** Procurement Request 4200.1.2CG for 1 month of operation with 100% accuracy.


References

- Coast Guard Food Service Manual COMDTINST M4061.5A (series); MAR 2009
-

Lesson Structure

Lesson Structure and Required Materials

This table explains this lesson's structure. If you lack materials or experience technical difficulties, contact Lesson instructor Adam Shelton at Adam.C.Shelton@uscg.mil

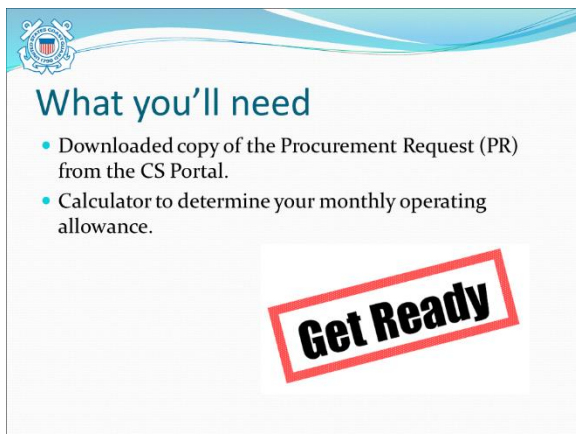
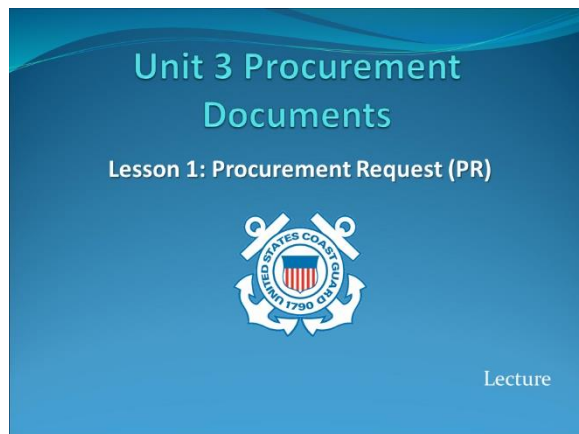
Lesson Title	Lesson 1. Procurement Request
Lesson Schedule	<u>Mode: Online Self-Directed</u> <ul style="list-style-type: none"> Expect this lesson to take approximately 1 hour
Paper Materials 	Paper "FSO-PVA Forms Packet" <ul style="list-style-type: none"> Refer to Procurement Request form (PR 4200.1.2G) Paper Job Aid Booklet: JA, "How to Complete a Procurement Request (PR)"
1. Develop Knowledge	This lesson begins with an online PowerPoint presentation followed with a video demonstration on how to Complete a Procurement Request (PR). See "Knowledge Development" Section in this User Guide for instructions.
2. Complete Practice	This lesson offers one practice on creating a Procurement Request (PR) See "Practice" Section in this User Guide for instructions.
3. Complete Assessment	This lesson offers an assessment to confirm student proficiency in completing a Procurement Request (PR). See "Assessment" Section in this User Guide for instructions.
End of Lesson Description	

Knowledge Development: Procurement Request

Instructions:
Online
Presentation

1. Access paper Job Aid, “How to Create a Procurement Request (PR) in the Job Aid Booklet
 2. Go to milSuite.mil (link below)
 3. <https://www.milsuite.mil/book/groups/fso-pva-course>
 4. Locate Unit 3. Procurement Documentation, Lesson 1. “Create a Procurement Request (PR).”
 5. Click on “Knowledge Development” link.
 6. Click on recorded presentation: “Create a Procurement Request”
 7. Optional: After viewing presentation, refer to the slides in this section as a refresher.
 8. Email instructor with any questions, if needed.
-

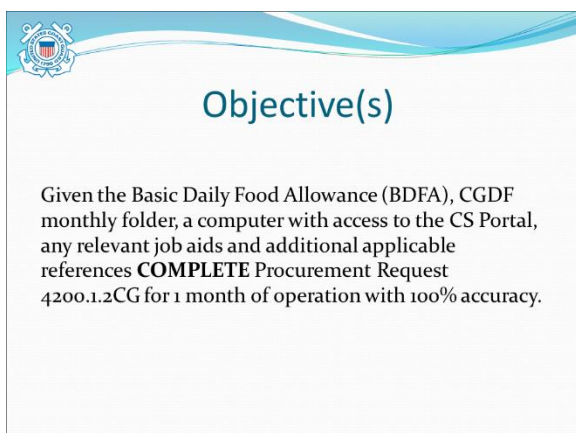
Procurement Request Slides

A light blue slide with a white wavy line at the top. The United States Coast Guard seal is in the top left. The title "What you'll need" is in blue. Below it are two bullet points. At the bottom right is a red stamp that says "Get Ready".

What you'll need

- Downloaded copy of the Procurement Request (PR) from the CS Portal.
- Calculator to determine your monthly operating allowance.

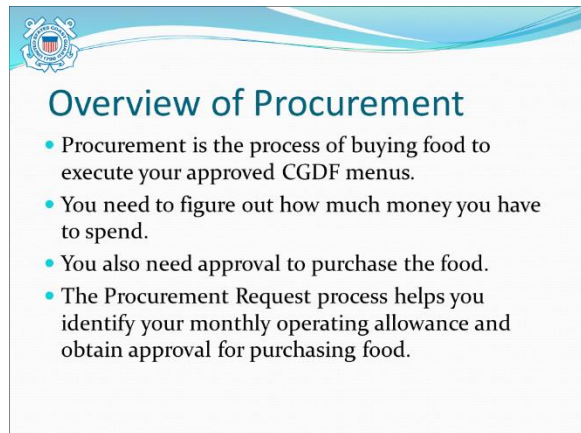
Get Ready

A light blue slide with a white wavy line at the top. The United States Coast Guard seal is in the top left. The title "Objective(s)" is in blue. Below it is a paragraph of text.

Objective(s)

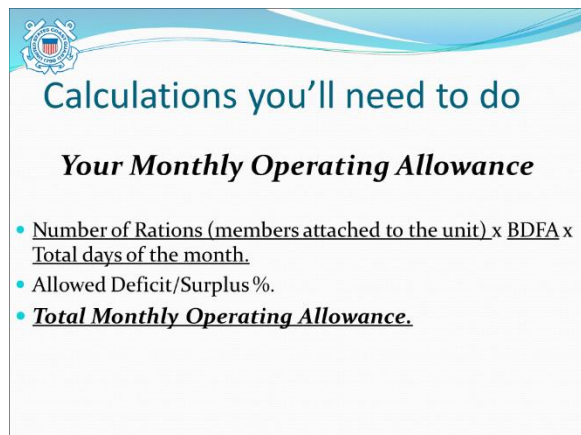
Given the Basic Daily Food Allowance (BDFA), CGDF monthly folder, a computer with access to the CS Portal, any relevant job aids and additional applicable references **COMPLETE** Procurement Request 4200.1.2CG for 1 month of operation with 100% accuracy.

Procurement Request Slides (Continued)



Overview of Procurement

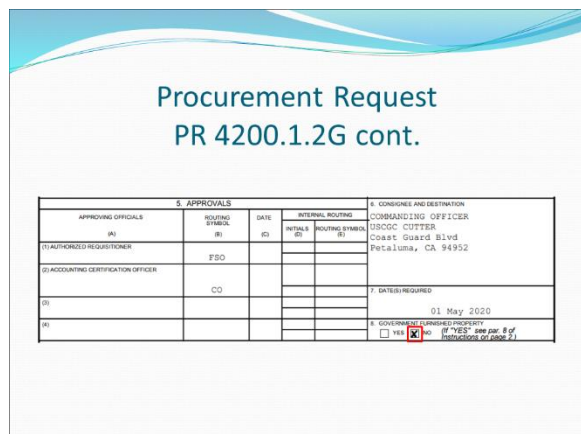
- Procurement is the process of buying food to execute your approved CGDF menus.
- You need to figure out how much money you have to spend.
- You also need approval to purchase the food.
- The Procurement Request process helps you identify your monthly operating allowance and obtain approval for purchasing food.



Calculations you'll need to do

Your Monthly Operating Allowance

- Number of Rations (members attached to the unit) x BDFA x Total days of the month.
- Allowed Deficit/Surplus %.
- **Total Monthly Operating Allowance.**



Procurement Request PR 4200.1.2G cont.

5. APPROVALS				6. CONSIGNEE AND DESTINATION	
APPROVING OFFICIALS	ROUTING SYMBOL	DATE	INITIALS	ROUTING SYMBOL	
(A)	(B)	(C)	(D)	(E)	
(1) AUTHORIZED REQUESTOR	FSO				COMMANDED OFFICER USCGC CUTTER Coast Guard Blvd Petaluma, CA 94952
(2) ACCOUNTING CERTIFICATION OFFICER	CO				
(3)					7. DATES REQUIRED 01 May 2020
(4)					8. GOVERNMENT EXPENSES <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO IF "YES" see par. 8 of instructions of page 2

Procurement Request Slides (Continued)

Summary and Review

- Procurement Request (PR)
 - Before you purchase any food
 - Beginning of each month (or day before)
 - Needs to be signed by the FSO
 - Needs to be signed by CO/OIC
 - Filed on left side of your Monthly Folder

What's Next

- Demonstration Video for Unit 3 Lesson 1 where we will talk through the process of downloading & filling in the Procurement Request
 - For the demonstration, you will need:
 - Paper copy of the Procurement Request form
 - Paper copy of the Job Aid for the PR
-

Knowledge Development: Demonstration – Procurement Request

Instructions: Online Demonstration

Access Practice Materials Online

1. Access paper Job Aid, “How to Complete a Procurement Request.”
2. Go to milSuite.mil (link below):

<https://www.milsuite.mil/book/groups/fso-pva-course>
3. Click on “Knowledge Development” link under Unit 3 Lesson 1
 1. Click on the Video Demonstration link:
 - a. DEMO_U3L1_Procurement Request
 2. View Video Demonstration while following along with your Job Aid steps and, as needed, referring to your paper Procurement Request (PR)
3. During or after viewing this video demonstration, write down any questions for instructor that will help you complete the practice activity in the next section.

End of Demonstration

Performance Criteria:

Note **the performance criteria** the instructor achieved as an outcome of this demonstration.

The same performance criteria will be applied to your practice (next section) and your assessment to confirm your proficiency in this skill.

End of Demonstration Instructions

Practice: Procurement Request (PR)

Instructions: Practice

Access Practice Materials Online

1. Access paper Job Aid, “How to Create a Procurement Request (PR)” IN YOUR Job Aid Booklet
2. Go to milSuite.mil for practice materials (link below):
<https://www.milsuite.mil/book/groups/fso-pva-course>
3. Click on PRACTICE link Under Unit 3, Lesson 1
4. Listed on this screen are the materials you need to complete your practice activity, including:
 - a. PRACTICE Procurement Authorization-Afloat

Complete Practice

Practice Scenario

You are the FSO on the CGC HAWKSBILL. The following are at your unit:

CO: LT Erin Sheridan

Approving Official: Unit's XO, LTJG Avery M Clearwater

Instructions: Complete Procurement Request (PR) procurement paperwork for the month of June 2020. There is a crew of 10 enlisted including you and the afloat BDFA is \$12.28.

Completed Practice Forms

1. Create EMAIL to instructor CSCS Shelton (Adam.C.Shelton@uscg.mil):
 - Subject: U3L1 PRACTICE (Your Last Name)
 - Attachment: Your practice doc(s)
 - Body of Email: Include this description
 - Unit/Lesson # and Practice (U3L1 PR)
 - Your full name, time zone, your email to receive instructor feedback, and your cell phone.

Continued next page

Practice: Procurement Request (PR), Continued

Instructions: Receive Instructor Feedback on Practice
Practice,
CONT.

13. Your instructor will contact you with feedback using the email and phone number you included in your email.

14. Instructor feedback on your practice:

IF	THEN
Your practice was correct	Proceed to Assessment
Your Practice had errors.	<ol style="list-style-type: none">1. Take notes capturing instructor feedback.2. If needed, ask the instructor questions to clarify your errors.3. Discuss with instructor if you are ready for assessment or if you want to complete another practice activity before trying the assessment.4. Pursue action determined with instructor in Step 3.

End of Practice

Assessment: Procurement Request (PR)

Instructions: Assessment

Before you begin:

1. This assessment evaluates your proficiency in this Terminal Performance Objective:
 - Given the Basic Daily Food Allowance (BDFA), CGDF monthly folder, a computer with access to the CS Portal, any relevant job aids and additional applicable references **COMPLETE** Procurement Request 4200.1.2CG for 1 month of operation with 100% accuracy.
2. Questions are not permitted during an assessment.
3. You are allowed three attempts to pass this assessment.
4. Performance Criterion for Successful Assessment Outcome:
 1. Completed Procurement Request including Blocks 1-10.
5. Refer to your Performance Test Checklist (PTC) Booklet for the PTC, “Create Procurement Request (PR)” to review this assessment. If you did not download the PTC Booklet at the start of this course, the PTC Booklet can be found on this course’s milSuite site.

Continued next page

Assessment: Procurement Request, Continued

**Instructions:
Assessment,
CONT.**Access Assessment Materials Online

1. Access the paper Job Aid, “How to Create a Procurement Request” in your Job Aid Booklet.
2. Go to milSuite for assessment materials (link below):

<https://www.milsuite.mil/book/groups/fso-pva-course>
3. Click “Assessment” link under Unit 3, Lesson 1
4. Listed on this screen are the materials you need to complete your assessment:
 - ASSESSMENT – Procurement Authorization – afloat (This is the Procurement Request form.)

Complete Assessment

6. Using your Job Aid, “How to Create a Procurement Request (PR) for guidance and the parameters below, complete the PR for one month.

PTC Assessment Scenario

You are the FSO on the CGC HAWKSBILL. The following are at your unit:

CO: LT Erin Sheridan

Approving Official: Unit’s XO, LTJG Avery M Clearwater

Instructions: Complete Procurement Request (PR) procurement paperwork for the month of July 2020. There is a crew of 10 enlisted including you and the afloat BDFA is \$12.26.

Continued next page

Assessment: Procurement Request, Continued

**Instructions:
Assessment,
CONT.**Completed Assessment Forms

10. Create EMAIL to instructor CSCS Shelton
(Adam.C.Shelton@uscg.mil):

- Subject: U3L1 ASSESSMENT (Your Last Name)
- Attachment: Your assessment doc(s)
- Body of Email: Include this description
 - Unit/Lesson # and Assessment (U3L1 PR)
 - Your full name, time zone, your email to receive Assessment: Procurement Request, Continued

Receive Instructor Feedback on Assessment

7. Your instructor will contact you with feedback using the email and phone number you included in your email.
8. Instructor feedback on your practice:

IF	THEN
Your assessment was correct	Congratulations! You have demonstrated proficiency in an important FSO skill.
Your assessment had errors.	<ol style="list-style-type: none">1. Take notes capturing instructor feedback.2. If needed, ask the instructor questions to clarify your errors.3. Discuss with instructor if you are ready to attempt a second assessment or if you want to go back and do another practice before attempting assessment again.4. Pursue action determined with instructor to successfully pass your assessment.

End of Assessment