

UNIT 5. PURCHASING

Lesson 1. Purchase Card & Purchasing Stores

Introduction

**Lesson
Overview**

This lesson describes the process of purchasing stores

Objective(s)

After this lesson, students should be able to:

- Purchase stores according to Coast Guard rules and best practice
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References

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

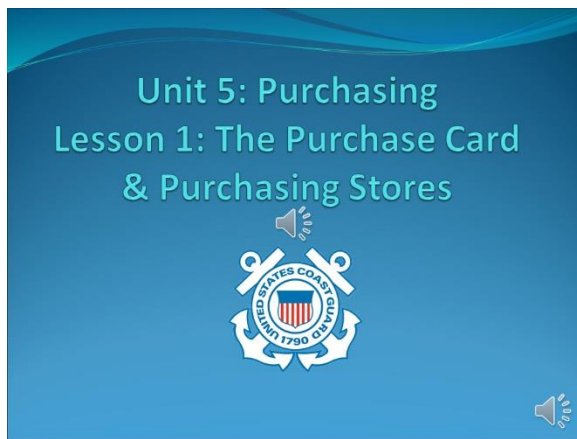
Lesson Title	Lesson 1. Purchase Card & Purchasing Stores
Lesson Schedule	<u>Mode: Online Self-Directed</u> <ul style="list-style-type: none"> Expect this lesson to take approximately 1 hour
Paper Materials 	Paper Job Aid Booklet: <ul style="list-style-type: none"> JA, "Purchase Card & Purchasing Stores) (aka "How to Purchase Stores")
1. Develop Knowledge	This lesson begins with an online PowerPoint presentation, a sample video, and is followed by a Practice exercise. See "Knowledge Development" Section in this User Guide for instructions.
2. Complete Practice	This practice shows a offers a chance to check your knowledge of the rules to purchasing stores. See "Practice" Section in this User Guide for instructions.
3. Complete Assessment	This lesson offers an assessment to confirm student proficiency in purchasing stores. See "Assessment" Section in this User Guide for instructions.
End of Lesson Description	

Knowledge Development: Purchase Card & Purchasing Stores

Instructions: Online Presentation

1. Access paper Job Aid, “Purchase Card & Purchasing Receipts” (aka “How to Purchase Stores”) in your Job Aid Booklet.
 2. Go to milSuite.mil for Knowledge Development materials. (link below):
<https://www.milsuite.mil/book/groups/fso-pva-course>
 3. Click “Knowledge Development” link under Unit 5 Lesson 1
 4. Listed on this screen are the materials you need to complete the presentation, including:
 - LECTURE U5L1 Purchase Card and Purchasing Stores
 - VIDEO 1 – Purchasing Sample DEMO
 5. Optional: After viewing presentation, refer to the slides in this section as a refresher.
 6. Watch VIDEO 1 to see a sample of good purchasing practices.
 7. Email instructor with any questions, if needed.
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Purchase Card & Purchasing Stores Slides



Objective(s)

- After this lesson, you should be able to:
 - Follow basic rules for Purchase Cards including:
 - Purchase only approved items and do not "split" your purchases
 - Do not let a vendor charge you sales tax or keep your Purchase Card number on file
 - Follow basic rules for purchasing food including:
 - Select fresh quality foods from reputable approved sources
 - Reliably collect and maintain item pricing and receipts/invoices

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Purchase Card Basics

- Avoid unauthorized purchases.
- Prohibit vendors from retaining your Purchase Card number on file.
- Prevent "split" purchases.
- Do not pay sales tax.
 - The tax-exempt number is **B239641**

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Purchase Card & Purchasing Stores Slides, Continued

Purchasing Basics

- Always shop with reputable, approved sources of supply.
- Be sure to check the appearance of produce for the best quality.
- Check dates on packaged goods for the freshest product.
- Whenever possible, source locally and in season.
- Make sure to write the price on each item before you place it in your shopping cart.
- Secure each receipt/invoice in a safe location.



Summary and Review

- Remember to:
 - Purchase food only from reputable approved sources
 - Look for the best quality items
 - Look at the expiration dates
 - Secure receipts/invoices in safe location
 - Protect your Purchase Card number and tax-exempt status



Questions?

- If you need clarification on this lesson, direct your questions to your instructor, CSCS Adam Shelton at TRACEN Petaluma.
 - Phone: 707-765-7427
 - Email: Adam.C.Shelton@uscg.mil



Practice: Purchase Card & Purchasing Stores

Instructions: Practice

Access Practice Materials Online

1. Access paper Job Aid, “Purchase Card & Purchasing Stores” (aka “How to Purchase Stores”) 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 “Practice” link under Unit 5, Lesson 1
4. Listed on this screen are the materials you need to complete your practice activity, including:
 - Video3 - Purchasing Sample PRACTICE
 - PRACTICE WORKSHEET Purchasing

Complete Practice

5. [Watch Video 3 and answer the questions on the Practice Worksheet](#)
6. Save your Worksheet with the name
 - Purchasing – PRACTICE (your last name)

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Practice: Purchase Card & Purchasing Stores, Continued

Instructions:
Practice,
CONT.

7. Completed Practice Forms

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

- Subject: U5L1 PRACTICE (Your Last Name)
- Attachment: Your Purchasing – PRACTICE Worksheet
- Body of Email: Include this description
 - Unit/Lesson # and Practice (U5L1 Purchase Card & Purchasing Stores)
 - Your full name, time zone, your email to receive instructor feedback, and your cell phone.

Receive Instructor Feedback on Practice

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: Verify Receipts

**Instructions:
Assessment**

If you are ready to complete your Assessment activity, follow the instructions below.

Access Assessment Materials Online

1. Access the paper Job Aid, “Purchase Card & Purchasing Stores” in your Job Aid Booklet. (aka “How to Purchase Stores”)
2. Go to milSuite for assessment materials (link below):
<https://www.milsuite.mil/book/groups/fso-pva-course>
3. Click “Assessment” link under Unit 5, Lesson 1
4. Click “Assessment” link under Unit 5, Lesson 1
5. Listed on this screen are the materials you need to complete your practice activity, including:
 - Video 3 – Purchasing Assessment
 - Purchasing – ASSESSMENT WORKSHEET
6. Watch Video 3 labeled to review the purchasing practices in the video.

Complete Assessment

- 4.7. Answer the questions on the Purchasing – ASSESSMENT worksheet.
- 5.8. Save your Worksheet with the name
 - Purchasing – ASSESSMENT (your last name)

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Assessment: Purchase Card & Purchasing Stores, Continued

Instructions for Assessment, CONT.

Submit Completed Assessment Forms

6.9. Completed Assessment Forms

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

- Subject: U5L1 ASSESSMENT (Your Last Name)
- Attachment: Your assessment doc(s)
- Body of Email: Include this description
 - Unit/Lesson # and Assessment (U5L1 Purchase Card & Purchasing Stores)
 - Your full name, time zone, your email to receive instructor feedback, and your cell phone.

Receive Instructor Feedback on Assessment

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

8.11. Instructor feedback on your assessment:

IF	THEN
Your assessment was correct	Congratulations! You are proficient in this skill!
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 to successfully complete assessment

End of Assessment