DEPARTMENTS OF THE ARMY AND THE AIR FORCE
NATIONAL GUARD BUREAU
UNITED STATES PROPERTY AND FISCAL OFFICER FOR NEW YORK
330 OLD NISKAYUNA ROAD
LATHAM, NEW YORK 12110-3514

USP&FO-NY SOP L-3 15 December 2020

USP&FO-NY EXTERNAL SOP FOR LOCAL PURCHASE REQUESTS (PR)

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*** This SOP supersedes USP&FO-NY SOP L-3; dated 15 March 2019.**

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CHAPTER 1

GENERAL INFORMATION

1-1. Purpose. This external Standing Operating Procedure (SOP) establishes guidance and procedures for processing and reviewing of SPS local purchase requests for supplies or services to ensure proper preparation by units/activities in General Fund Enterprise Business System (GFEBS). Also, covers proper procedures for closing out the goods receipt for payment. Government Purchase Card (GPC) PR procedures are not covered in this SOP.

1-2. Scope. The procedures outlined in this SOP apply to and are to be followed by all customer units, Program Managers (PM) and activities supported by the USP&FO-NY.

1-3. Revisions. Revisions to this SOP will be published as required to comply with changes to applicable publications and improve customer support. Forward any recommended changes to USP&FO-NY, ATTN: MNPF-SS for appropriate action.

1-4. References. Publications used in conjunction with this SOP are:

a. AR 710-2	Supply Policy Below the National Level
b. FAR	Federal Acquisition Regulation
c. DFAR	Defense Federal Acquisition Regulation
d. NG-FAR	National Guard Federal Acquisition Regulation Supplement
e. AR 37-108	General Accounting and Reporting for Finance and Accounting Offices
f. DA Pam 710-2-1	Using Unit Supply System Manual Procedures
g. DA Pam 710-2-2	Supply Support Activity (SSA) Supply System, Manual Procedures
h. DOD FMR	DOD Financial Management Regulation 7000.14-R
i. USP&FO-NY MNPF-PC	Local Purchase SOP

CHAPTER 2

PROCUREMENT LEAD-TIMES

2-1. Basis for Lead-times. The PR must be input in GFEBS to be routed and approved at all levels in a timely manner to get to SPS, Purchasing Office. Additional time must be considered for the contractor's delivery period. The lack of adequate lead-time is not sufficient justification for non-competitive purchasing.

2-2. Lead-time Requirements. The chart below establishes minimum lead-times required to ensure timely purchase of supplies and services for common items.

TYPE OF REQUEST	MINIUMUM LEAD-TIME AT USP&FO (Calendar Days)
Acquisitions exceeding $1M	180
Acquisitions exceeding $25K to $1M	120
Option or Change Order Modification	90
Lodging under $25K	60
Maintenance Agreements under $25K	60
Conference/Meeting Rooms under $25K	60
Subsistence / Catered Meals under $25K	30
Training and Recruiting Ads under $25K	30
Other Supplies & Services under $25K	30

2-3. Non-compliance of Lead-times. Non-compliance could result in a futile attempt to secure requirements by contracting personnel or being returned without action due to untimeliness of request.

CHAPTER 3

PR PROCEDURES

3-1. Purchase Request Processor. The Purchase Request Processor is the role required to process a PR. The PR in GFEBS replaces the hard-copy DA Form 3953, Purchase, Request, and Commitment. GFEBS requires training and provisioning in order to execute and complete a PR.

3-2. Purchase Request Approver. The Purchase Request Approver is the role required to approve a Purchase Request (PR). There are 3 Levels of Approval required to move a PR thru GFEBS to SPS.

a. L1 Program or Fund Manager Level.

b. L2 Required for Food Service and Lodging, performed by MNL.

c. L3 Supply and Services Officer, MNPF-SS, Review approval of PR.

d. L4 Second Level of Program or Fund Manager Approval for FINAL Review and approval of PR. **CRUCIAL: At this level, approver verifies with the Purchasing and Contracting Office that the PR has crossed over from GFEBS to SPS (T-Code ZSSC_SPS_PR). At this time your Purchase Request, even though you L4'd, is still only a Commitment, will not move to an obligation until MNPF-PC has an approved Contract.**

3-3. Steps to Generate a PR in GFEBS. Appendix B has the step-by-step instructions on how to create a standard GFEBS SPS PR with screen shots. Appendix C has the step by step instruction on how to create a service based GFEBS SPS PR.

3-4. Additional Guidance and Attachments Required for GFEBS PR.

a. All requisitions ordered thru wholesale or local purchase require a DODAAC document number. Ensure you place the GFEBS DODAAC Document Number in the Text tab of the SPS PR or it will be rejected.

b. Attachments Required for GFEBS PR Approval of Supplies:

(1) Local Purchase Authorization Memo. Supplies with a stock number (standard or non-standard in AESIP) require a Local Purchase Authorization Memo (Appendix F) attached to GFEBS PR.

(2) DA Form 3953. All PRs for accountable equipment REQUIRE a DA Form 3953 attached to PR with a GFEBS DODAAC document number and PBO signature.

(a) Ensure the authorized Line Item Number (LIN) is clearly marked in the Text tab of the SPS PR. If available, provide the MCN/NIN or AESIP Request Number.

(b) Local Purchase Authorized. Ensure that the specific document authorizing the equipment is entered (i.e. CTA, TDA, MTOE). If authorized by a directive or letter of authority (LOA), a copy must be attached to PR.

(c) Information Technology (IT) Equipment. In addition to above, all IT equipment requires NYARNG Chief Information Officer (CIO) G6 approval prior to purchase.

1. Ensure the DA Form 3953 has been routed to the MNCI after PBO approves.
2. MNCI will stamp with the RCAS compliance stamp and initial.

(d) Attach the completed DA 3953 to the PR (as a .pdf).

c. In-Kind Assistance. All PRs for Cooperative Agreements must have “IN KIND ASSISTANCE” annotated in the text box of the PR to include which Appendix it refers to.

d. Appendix D lists the common errors the Purchasing and Contracting Office encounter when a GFEBS PR is received in SPS.

e. Upon receipt of Accountable Equipment, unit’s must submit a DD Form 250 (MATERIAL INSPECTION AND RECEIVING REPORT), a copy of the contract and any packing lists to their respective PBO. The PBO will bring the item to record on the unit’s property account.

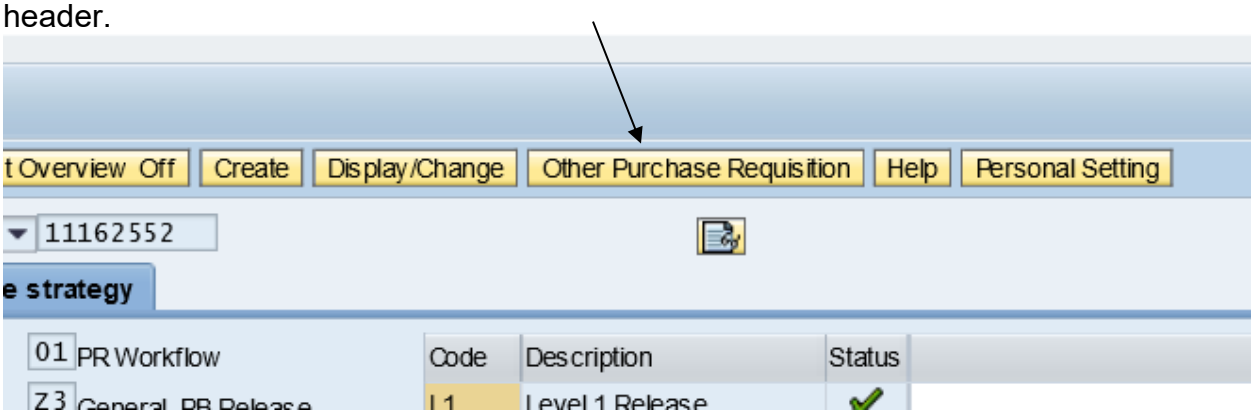
3-5. Steps to trace an SPS PR to the Purchase Order (PO). Note: PO will only be produced when the contract is cut.

a. STEP 1. In GFEBS use T-Code “ZSSC_SPS_PR” to determine if PR crossed over to SPS bridge successfully.

(1) Hit Enter, enter PR Number and Press Execute.
(2) The Screen will list the Outbound IDOC Creation Date, ACK/NCK Status should read “SUCCESS” and the Message should read “PR Doc Successful delivered and inserted into SPS with obj_id ####”.
(3) If PR is Unsuccessful you will need to do a T-Code WE02 Display IDoc or T-Code WE09 Search for IDocs by Content.

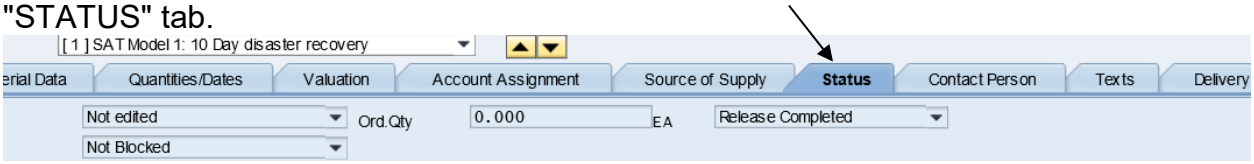
b. STEP 2. In GFEBS use T-Code ME53N (Display Purchase Requisition) to determine the PO associated with the PR.

c. STEP 3. Click on "OTHER PURCHASE REQUISITION" button on the display header.



d. STEP 4. A window will open; type in your PR Number and hit "ENTER". Be sure that in this window "PURCH REQUISTION" is selected.

e. STEP 5. On the bottom of the screen in the "ITEM" section click on the "STATUS" tab.



f. STEP 6. If you can't see that tab on the far right of the "ITEM" section click on the icon that looks like a folder with an arrow pointing down. Drop down menu will appear; select the "STATUS" option.

g. STEP 7. Here you will find the PO Number associated with that PR.

h. STEP 8. In order to process the Goods Receipt, covered in Chapter 4 of this SOP, you require an invoice. Contact Voucher Processing to see if there are any outstanding invoices for this PO.

CHAPTER 4

GOODS RECEIPT PROCESSING

4-1. Goods Receipt Processor. Goods Receipt Processor is the role required to process a Goods Receipt in GFEBS. The Goods Receipt Processor role replaces signing the SF 1449, Solicitation/Contract/ Order for Commercial Items or the DD Form 1155, Order for Supplies or Services, which were used in conjunction with the legacy system. GFEBS Goods Receipt processing has been phased out and must be completed in WAWF.

4-2. Wide Area Workflow (WAWF). System of Record to close out for all 2 in 1 and COMBO goods receipt for payment.

a. 2 in 1. Invoice and Goods Receipts combined as one document. Used for all Service Contracts.

b. COMBO. Invoice and Goods Receipt are separate. Used for all Goods and Maintenance.

4-3. Process in WAWF. Appendix F has the screen shots on how to create a Goods Receipt in WAWF. This process will be used for 2 in 1 or COMBO invoices.

The proponent office for this SOP is the United States Property & Fiscal Office Supply and Services Division, MNPF-SS. Users are invited to send comments and suggested improvements directly to ATTN: MNPF-SS, Watervliet Arsenal, 1 Buffington Street, Watervliet, NY 12189.

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This publication is available on the USP&FO-NY Webpage, http://dmna.ny.gov/uspfo/?id=supp

APPENDIX A

CREATE STANDARD GFEBS SPS PR

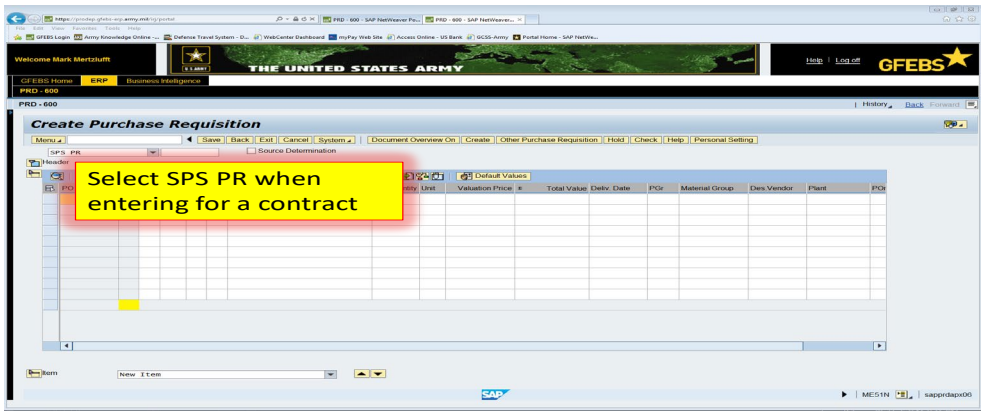
ME51N Create SPS PR

- Used when entering Purchase Requests in GFEBS
- Select from the drop down SPS PR
- Enter under the Text Tab any information pertaining to the contract or copy and paste from any electronic document including the contract number and the GFEBS DODAAC document number

10/31/2014 1

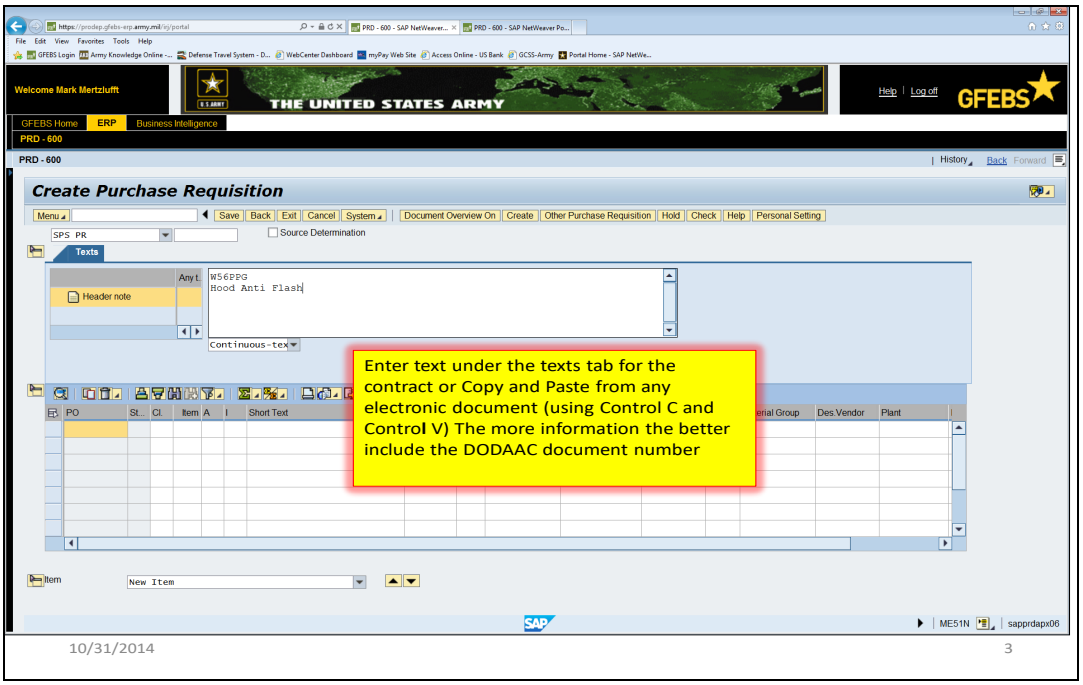
ENSURE THE GFEBS DODAAC DOCUMENT NUMBER IS ENTERED HERE

ME51N Create SPS PR



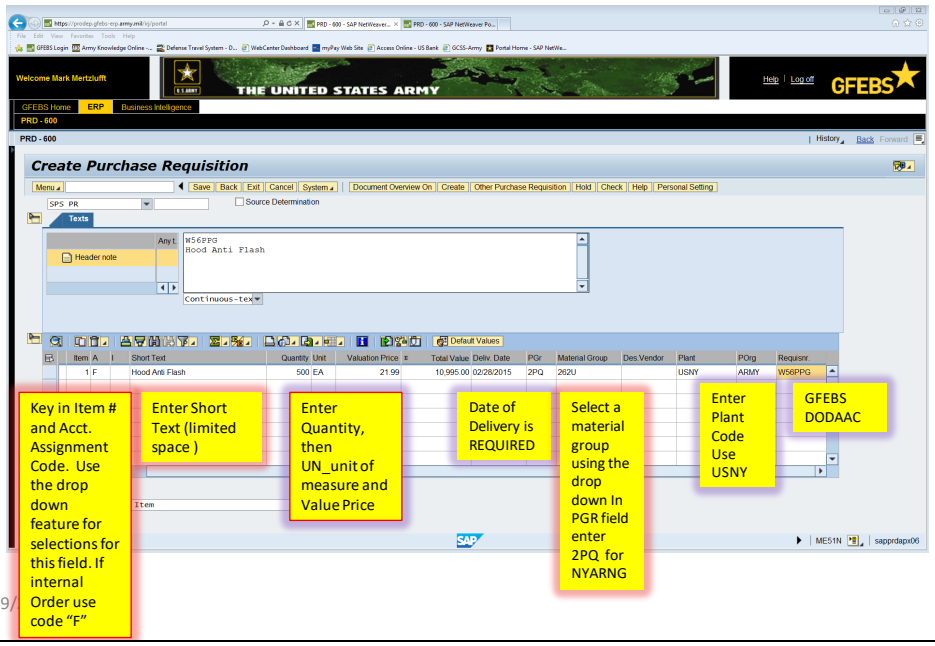
10/31/2014 2

Select from the drop down "SPS PR"



Enter Text for the contract to include GFEBS DODAAC document number

ME51N Create SPS PR



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ME51N Create SPS PR

- Key in the Item number (1, 2, 3) and in field A (Acct. Assignment Code). Use the drop down feature and select cost center, order, project. Account Assignment Category will be “F” if Internal Order is required. (In this example F was selected for order.)
- Enter a short text (this is a space limited field)
- Under Quantity field enter the quantity amount.
- Enter a delivery date material is required
- Enter a material group by using the drop down selection (this is usually a match to the commitment item (EOR)
- Enter 2PQ in the PGR (Purchasing Group) for NY ARNG location. Enter a Plant code USNY.
- In the tracking field enter your Initials and the last 4 digits of your phone extension. If this number is always entered in the tracking field you can easily pull all PR’S that you have created.
- Hit Enter at this time so the system will save the data already entered.

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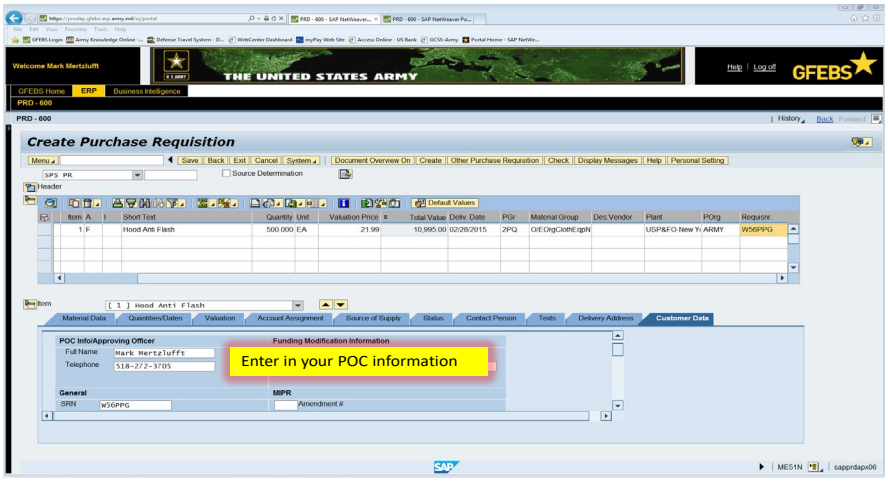
ME51N Create SPS PR



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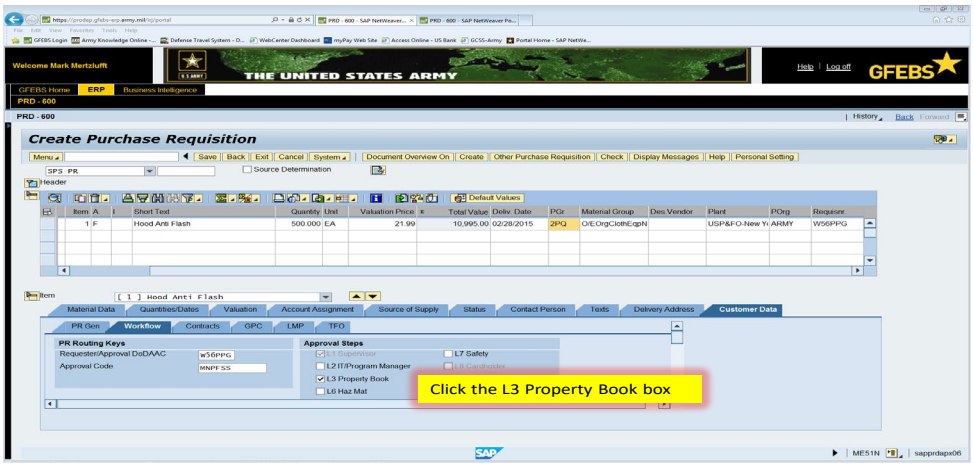
Go to the Customer Data Tab

ME51N Create SPS PR



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ME51N Create SPS PR

- Go to the Customer Data Tab
- Then to the PR General Tab
- Enter your POC information
- Enter in SRN Field (any number since this will be changed to the GFEBS PR Document number after completion of this entry)
- Go to the Workflow Tab
- Enter your GFEBS Workflow DODAAC in the Requestor DODAAC field
- Select L1, L3 and L4 approval steps (L2 for Lodging and Class I)
- Go to the Contract Tab
- Enter the NAICS (use the drop down)
- Enter the FSC (use the link http://www.usabid.com/resources/tables/pscs/) for lookup

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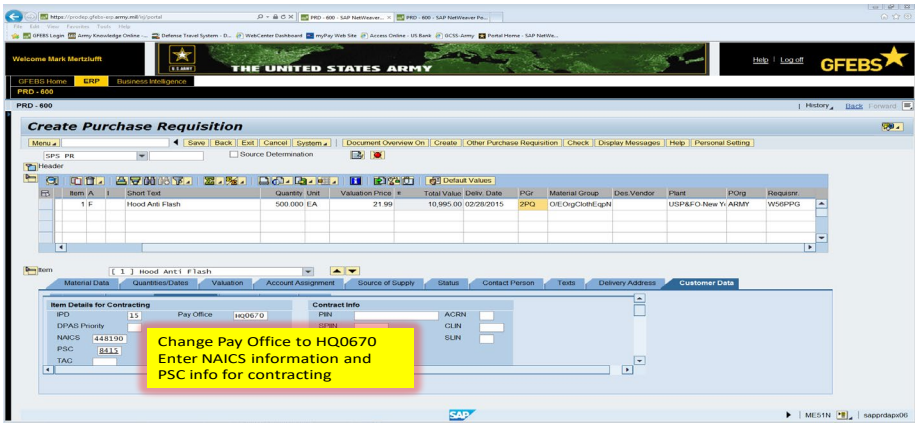
ME51N Create SPS PR



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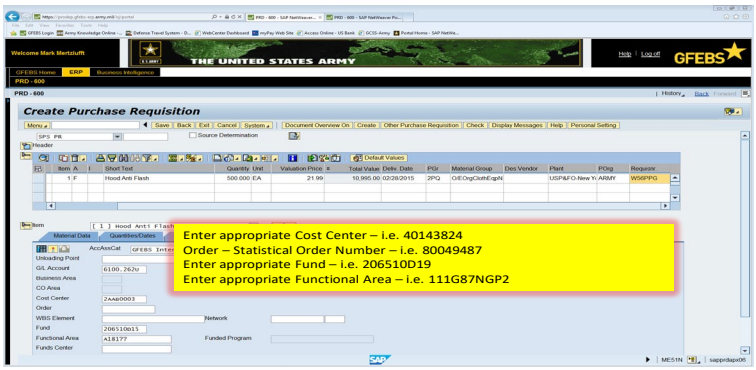
ME51N Create SPS PR



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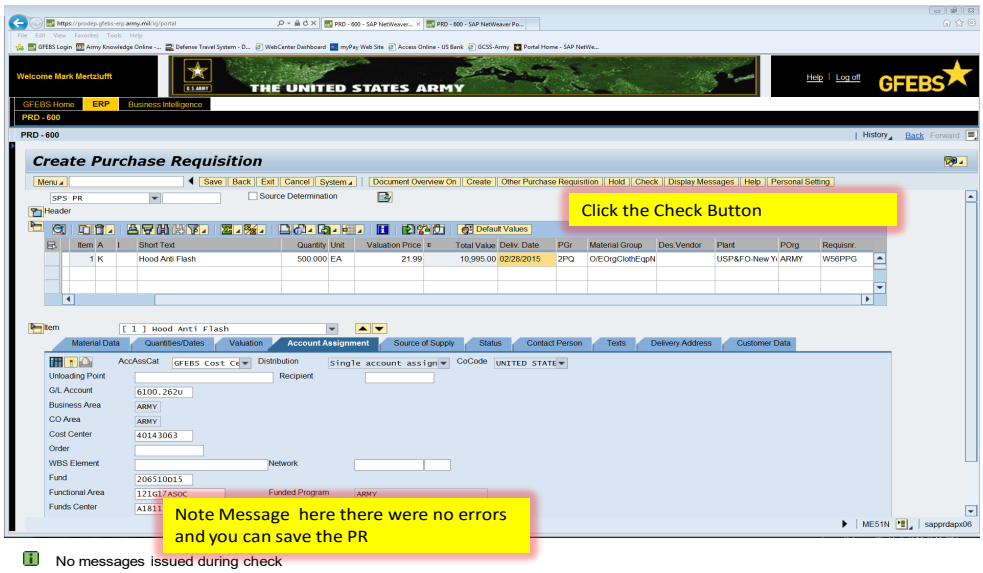
Account Assignment Tab
The G/L Account should default from the Material Group tab entry
Enter in the Cost Center Field
Enter in the Order – Statistical Order Number for ISR tracking
Enter the WBS (if applicable)
Enter in the Fund 206510D19 (example)
Enter in the Functional Area (the appropriate AMSCO/MDEP)
All other fields should default

Click the check button
Note bottom of screen if there are any messages that may require further entry.
Then Save. The system will give you a PR Document Number 100XXXXX



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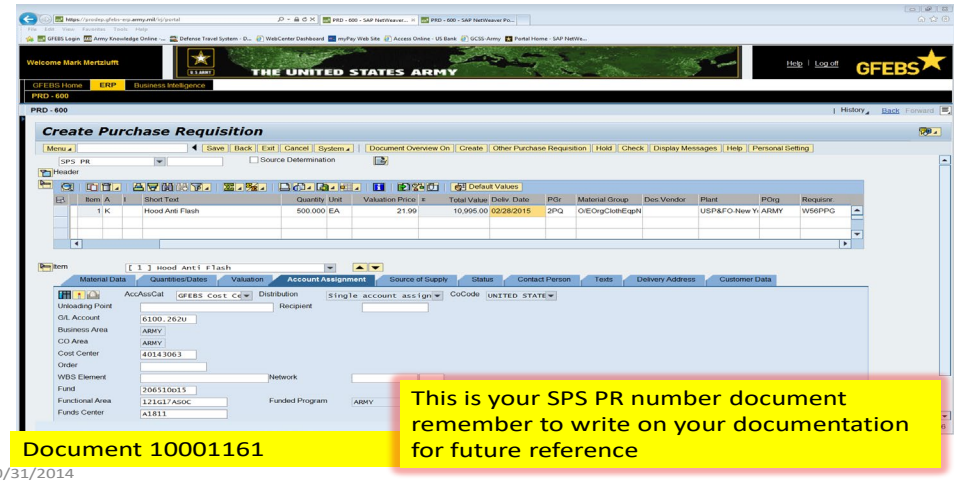
- Click the check button
  Note bottom of screen if there are any messages that may require further entry.
  Then Save

ME51N Create SPS PR



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Ensure you write down your SPS PR Number

ME51N Create SPS PR

- Go to ME52N (to change the Customer Data/PR Gen/SRN field to add your GFEBS PR Document)
- Most of the time the system will default in your last entered PR.
- If the system did not populate the correct PR then click on Other Purchase Requisition and enter in the PR Number to change.

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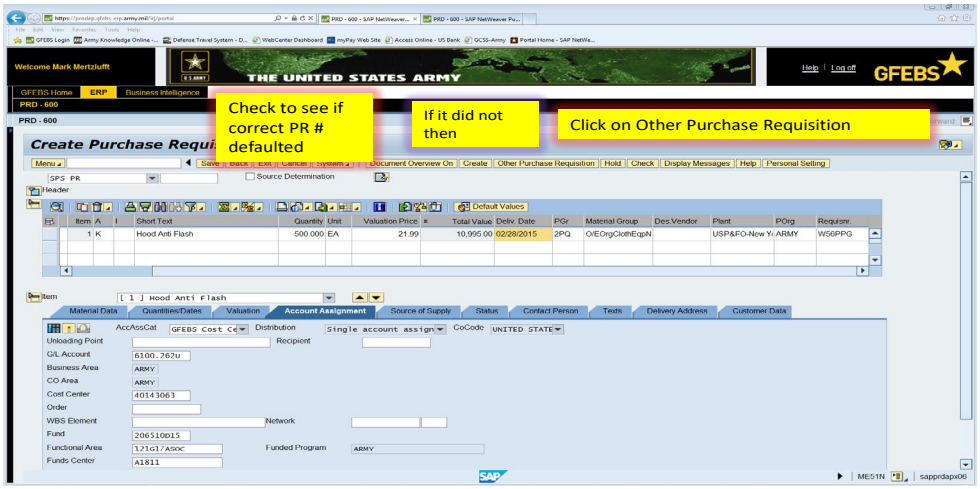
ME51N Create SPS PR



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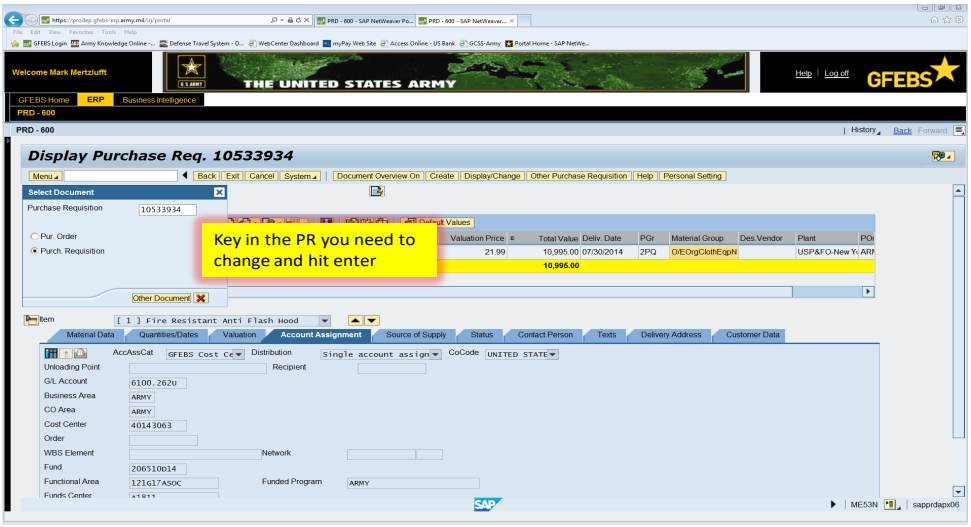
ME51N Create SPS PR



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Change PR – Add Attachments

- Click on Other Purchase Req. Icon. Key in the PR you just entered and save Example: 10001161
- Hit enter The system will pull up that PR number (10001161)
- To add your attachments-Click on Services for Object
  - All files are required to be .pdf
  - Attachments should be DA3953 completed; LOJ; NY Local Purchase memo
- Drop down, select Create/Create Attachment
- Import File and Upload
- Go to Customer Data Tab
- Then the PR General Tab
- Go to the SRN Field and change to the GFEBS PR Document number (10001161)
- Then Save.
- You have completed the entry for an SPS PR in GFEBS.

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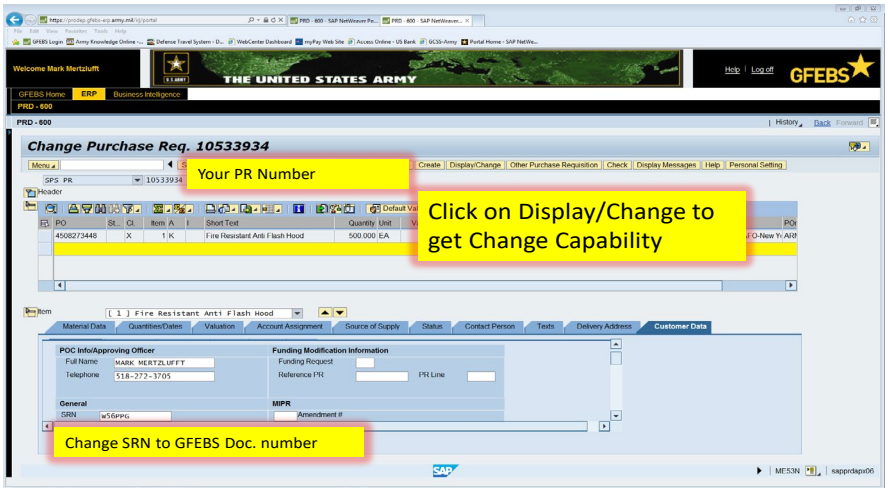
ME51N Create SPS PR



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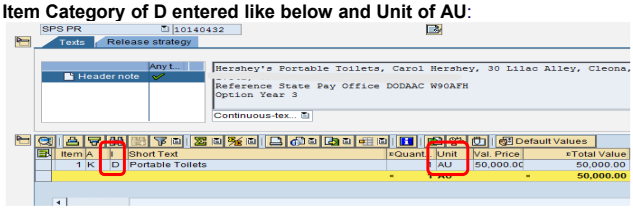
APPENDIX B

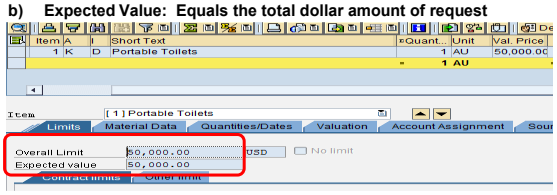
CREATE A SERVICE BASED PR IN GFEBS

Create Purchase Requisition

- **Creating Purchase Requests for services only has two differences from a regular SPS Purchase Requisition**
  1. **Item Category of D entered like below and Unit of AU**:

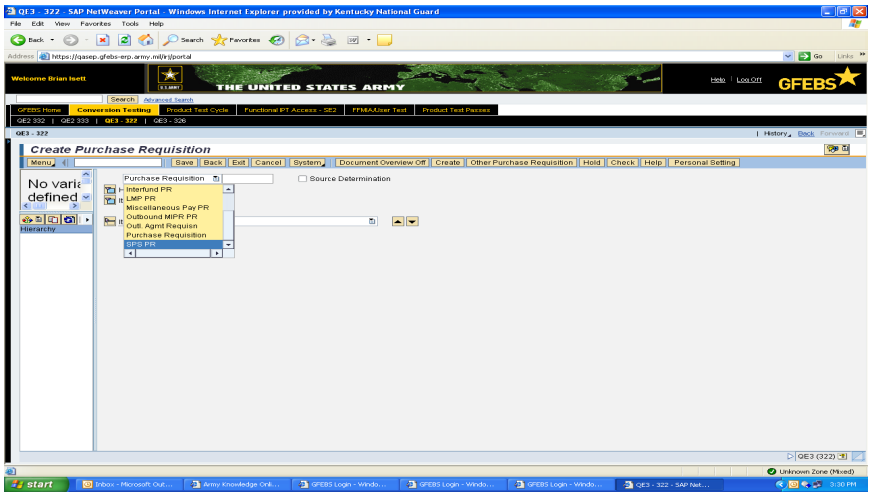


  2. **Item Category D requires that the Limits tab be filled out**
     a) **Overall Limit: Equals the total dollar amount of request**
     b) **Expected Value: Equals the total dollar amount of request**



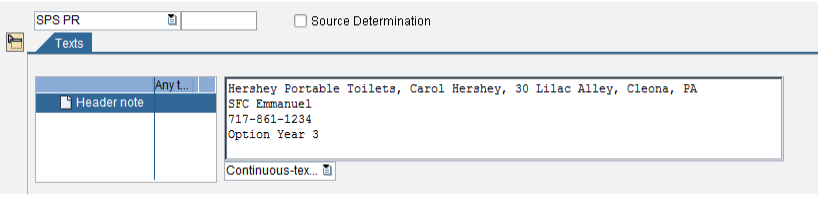
Create PR cont.

Enter transaction **ME51N** and select **SPS PR** from document type drop down



Create PR Cont. (Header Data)

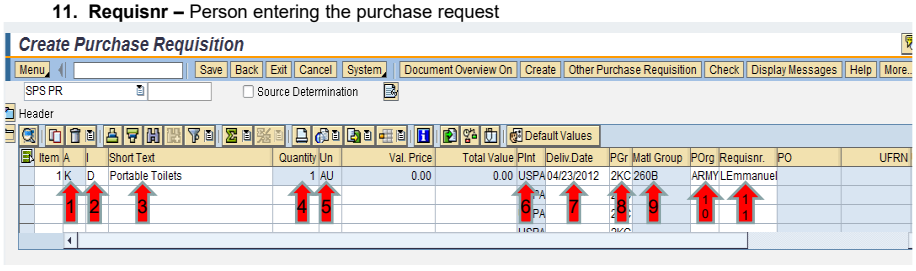
Enter Header Data with pertinent information for the service being requested.



Create PR Cont. (Item Overview)

Required Fields:

1. **Account Assignment:** U – Unfunded, K – Cost Center, P – Project (WBS)
2. **Item Category –** since this is service, D will be used. All other purchases this is left blank
3. **Short Text -** short description of service being requested
4. **Quantity -** for service, quantity will always be 1
5. **Un –** for service, unit of measure will always be AU
6. **Plant –** State's assigned Plant
7. **Delivery Date –** Date services being requested
8. **PGr (Purchasing Group) –** last 3 characters of contracting Dodaac
9. **Matl Group –** Element of Resource (EOR)
10. **Porg (Purchasing Organization -** Army
11. **Requisnr –** Person entering the purchase request

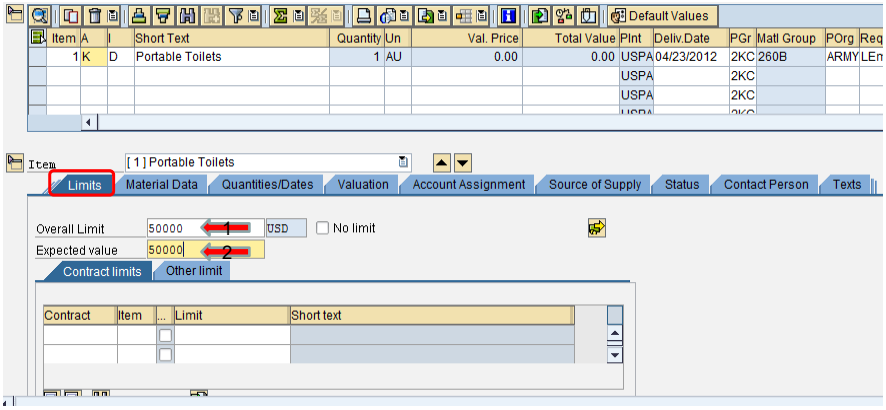


Create PR Cont. (Item Detail Section)

Go to the Limits Tab and fill out the following fields:

1. **Overall Limit –** Total Value of service request
2. **Expected Value –** Total value of service request

After fields are populated hit enter.

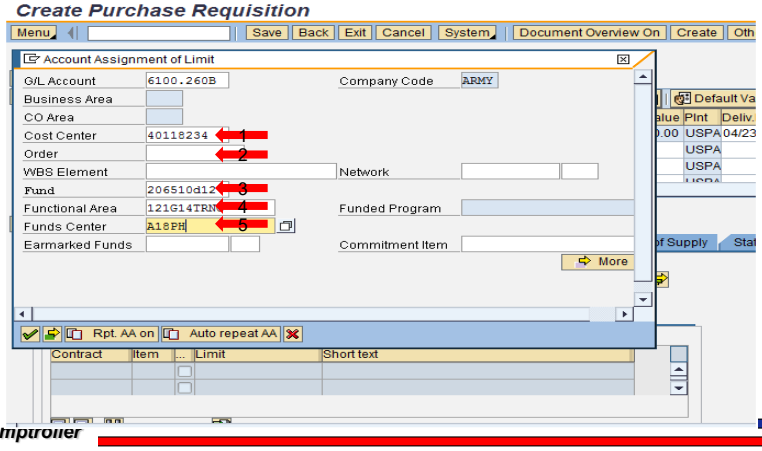


Create PR Cont.

Account Assignment Pop Up box will appear, fill out the following fields:

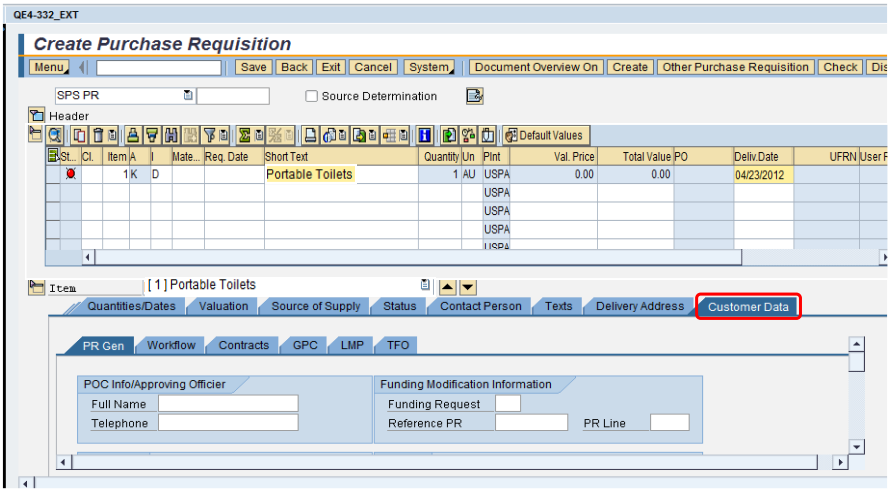
1. **Cost Center**
2. **Order (SIO Tracking only if applicable)**
3. **Fund (2065 – Appr/10 Base/OCO D21-Year) 206510D21**
4. **Functional Area**
5. **Fund Center**

After fields are populated, click the green check mark



Create PR Cont.

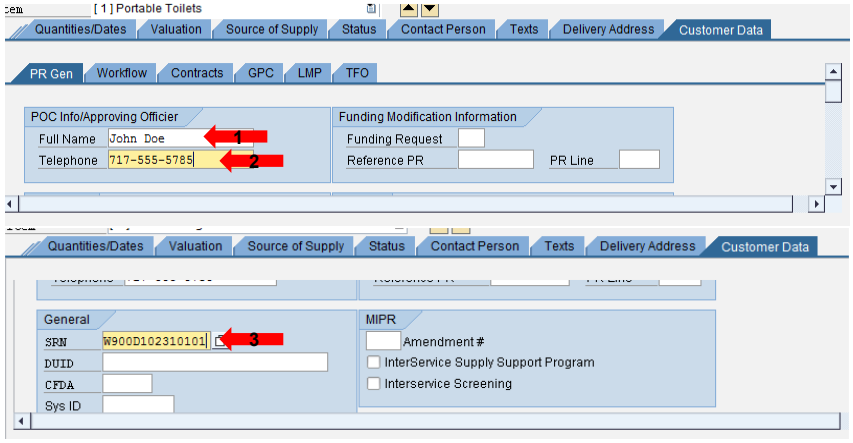
Go to Customer Data Tab:



Create PR Cont.

In the PR Gen tab, the following information is required:

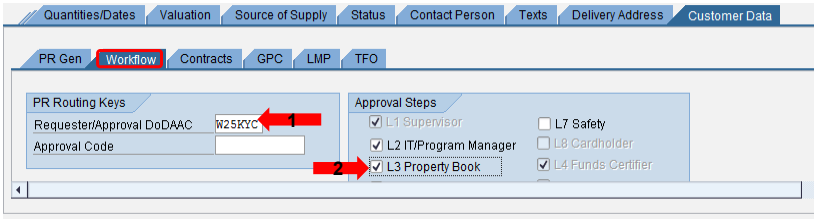
1. POC Full Name
2. POC Telephone
3. SRN – Standard Reference number



Create PR Cont.

Click on the Workflow Tab; fill out required fields:

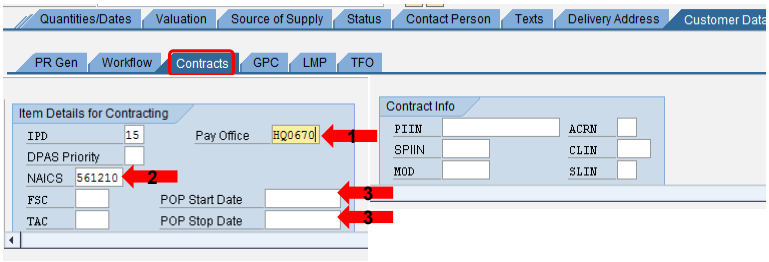
1. Requester/Approval DoDAAC – designates approval routing
2. Select L3 approval check boxes – this will make the PR goes through the required three levels of approval. L1 and L4 are defaulted for you.



Create PR Cont.

Click on the Contracts tab; fill out required fields:

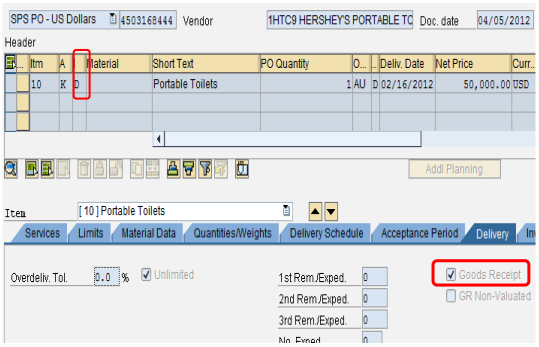
1. Ensure the Pay Office DoDAAC is HQ0670
2. NAICS – North American Industry Classification System
   - Refer to http://www.naics.com/search.htm to search for NAICS code
3. POP Start Date and POP Stop Date – this is not a required field but if the if the request is for a period of performance populate the dates here

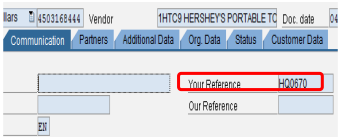


****You are now ready to save your document. Click save and your Purchase Request will be generated.**

Purchase Order Created

- P&C awards the contract using GFEBS Pay Office DODAAC of HQ0670 and a Service FSC
- Purchase Order Created with item category of D and the Goods Receipt indicator checked





**Data shown via transaction ME23N

APPENDIX C

COMMON ERRORS ON SPS PRS

Listed below are the Most Common Errors found on PRs when processed in SPS:

1. Incorrect Line of Accounting.
SOLUTION: Requires total modification of PR and Contract.

2. Items needed from multiple vendors on one PR –
SOLUTION: ONE PR PER VENDOR.

3. Incomplete or Missing description of items needed.
SOLUTION: Ensure all information is clearly annotated in TEXT Box of GFEBS PR and in the item description to carry-over to SPS.
All Descriptions need to be on a Microsoft Word document or Excel spreadsheet so that it can be formatted/edited as necessary. Additional supporting documentation should be emailed to the Purchasing and Contracting group email: ng.ny.nyarng.mbx.mnpf-pc@mail.mil

4. Wrong Ship to address - Happens about 95% of the time.
SOLUTION: Ensure a clear destination address is annotated in the Tab.

5. PR not approved in GFEBS - We only get draft.
SOLUTION: These will need to be approved in GFEBS.

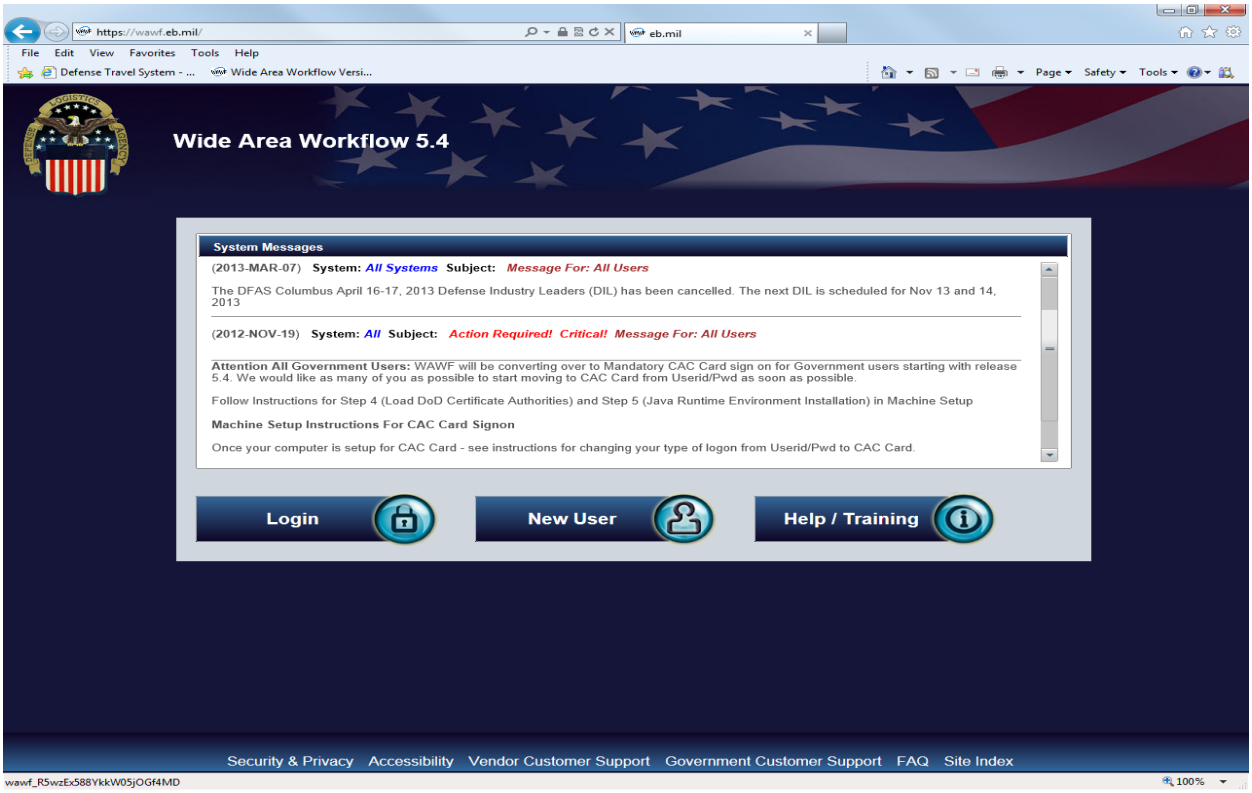
6. Wrong unit of issue (UI).
SOLUTION: Ensure all information is clearly annotated in TEXT Box of GFEBS PR and in the item description to carry-over to SPS. IF IN DOUBT, CONTACT P&C.

If the PR has already been processed, a PR modification will need to be made.
Unit of issue for supplies = Each and PSC code MUST be a number
Unit of Issue for services = Job and PSC MUST be an Alpha character.

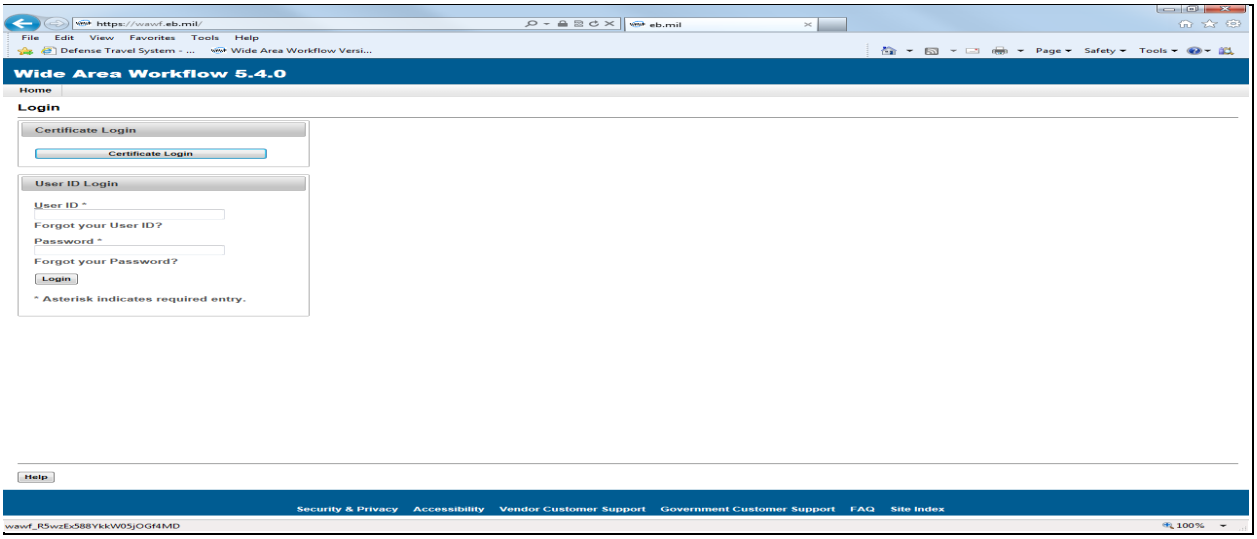
7. Missing points of Contact.
SOLUTION: Ensure all information is clearly annotated in TEXT Box of GFEBS PR and in the Point of Contact TAB to carry-over to SPS.

APPENDIX D

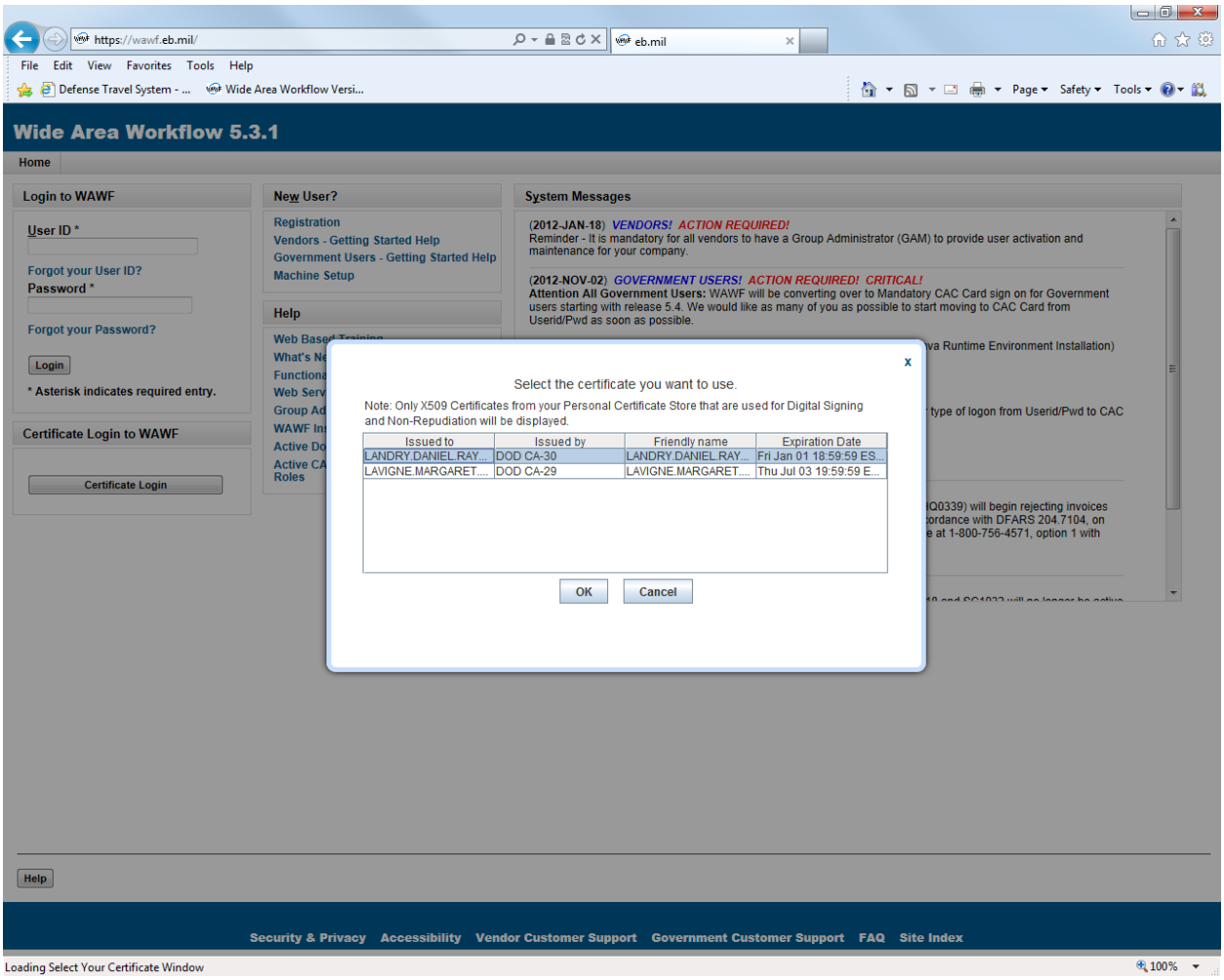
CREATE GOODS RECEIPT IN WAWF



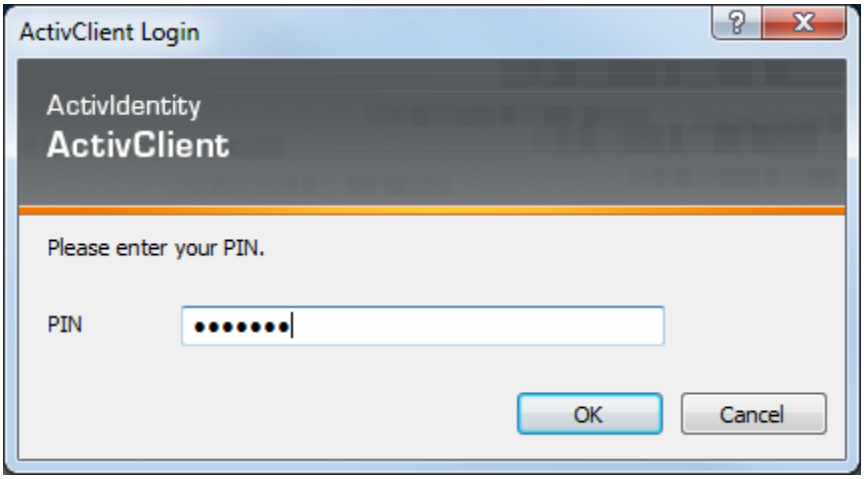
CLICK ON LOG IN



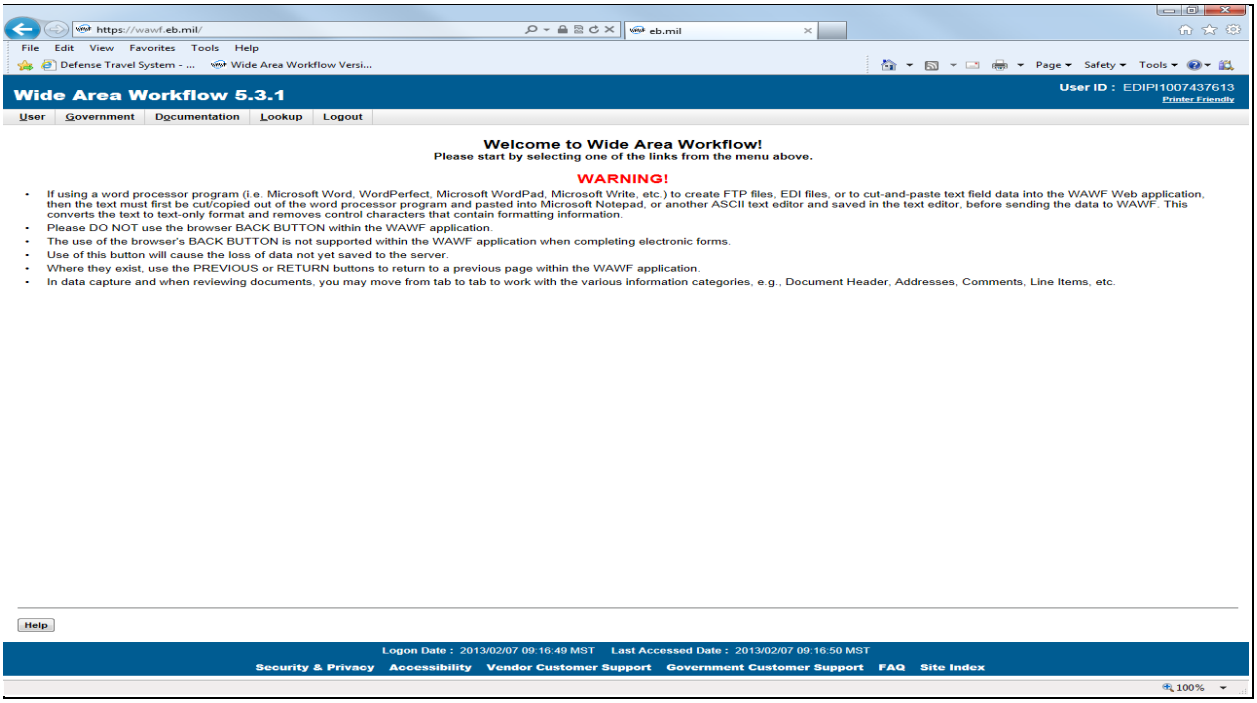
CLICK ON CERTIFICATE LOGIN



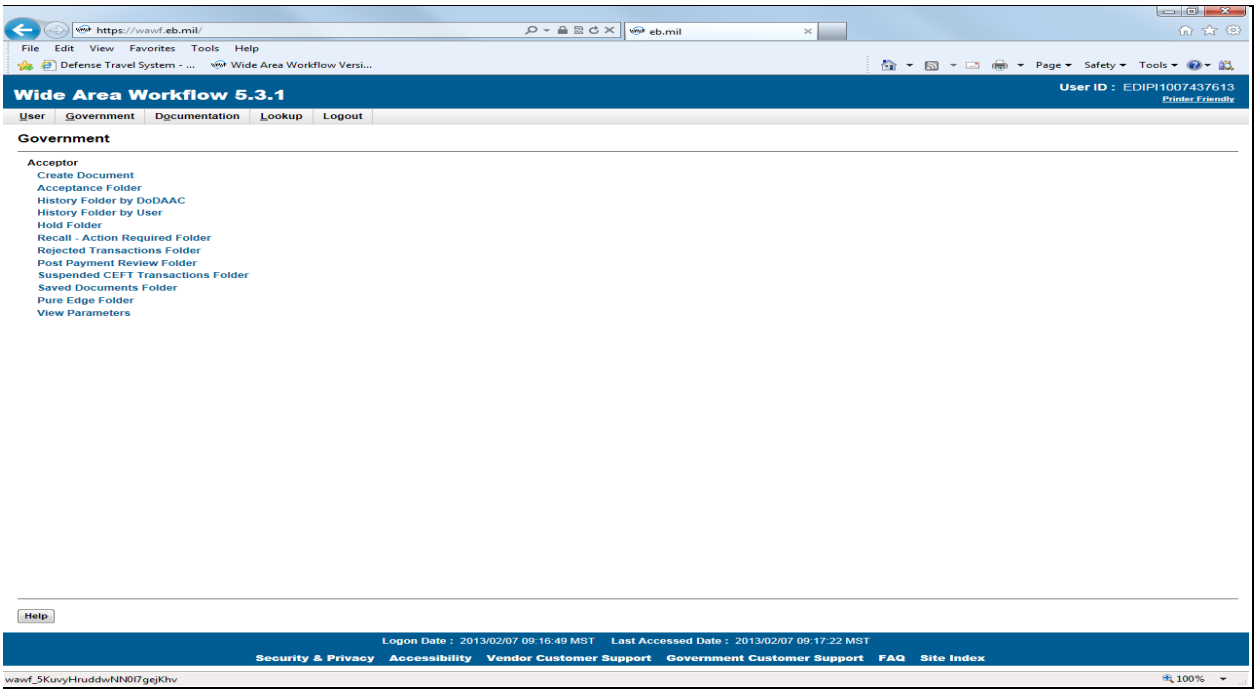
CLICK ON YOUR CERTIFICATE AND CLICK ON OK



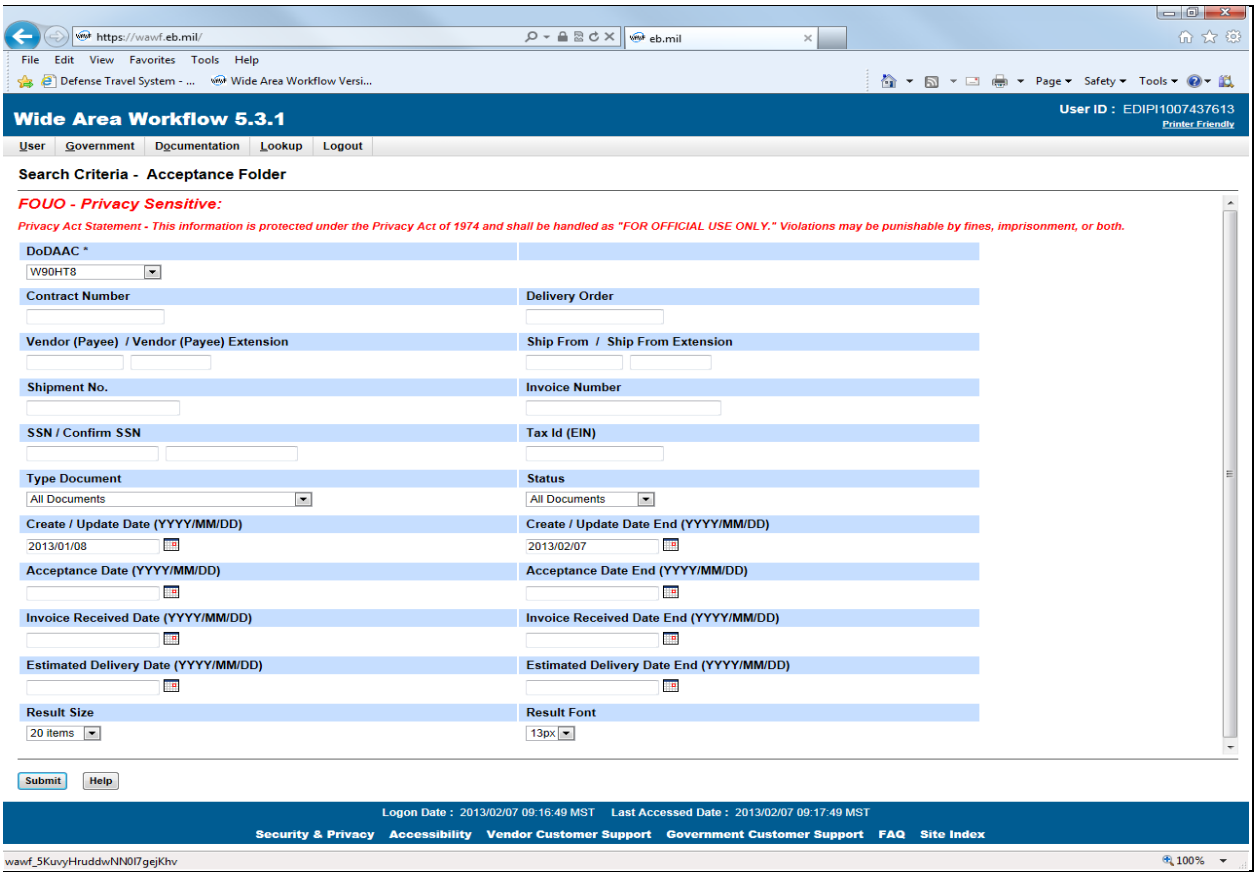
PIN NUMBER AND OK



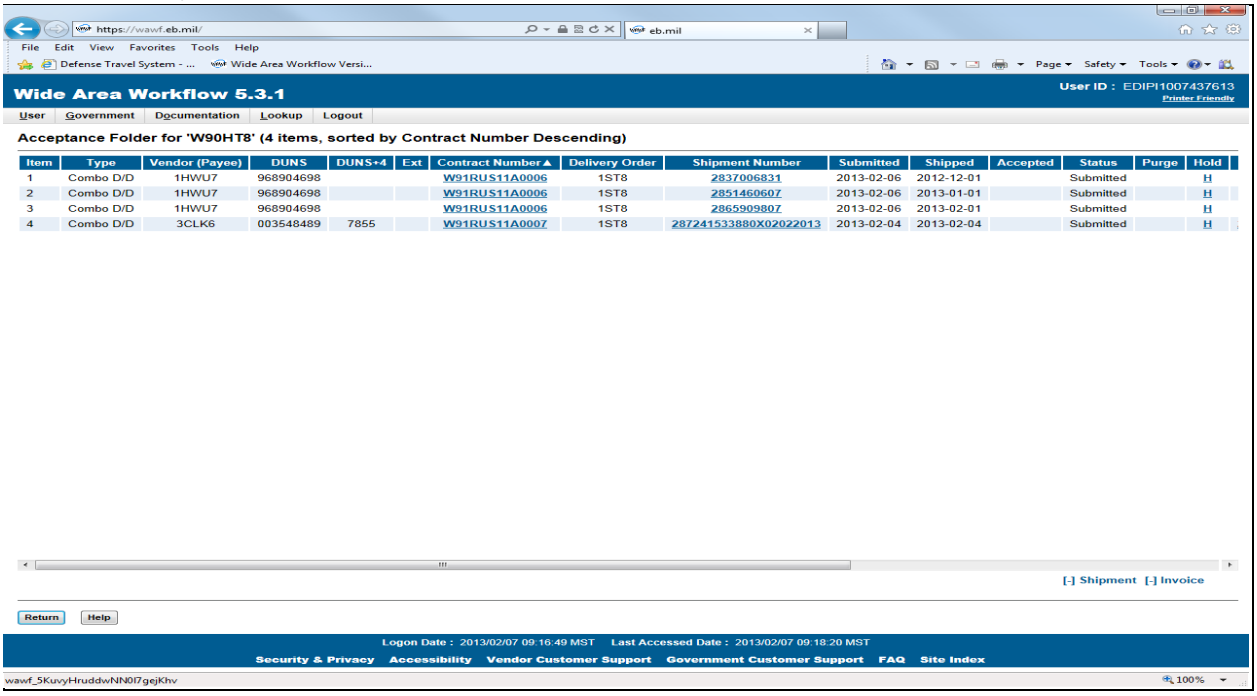
CLICK ON GOVERNMENT



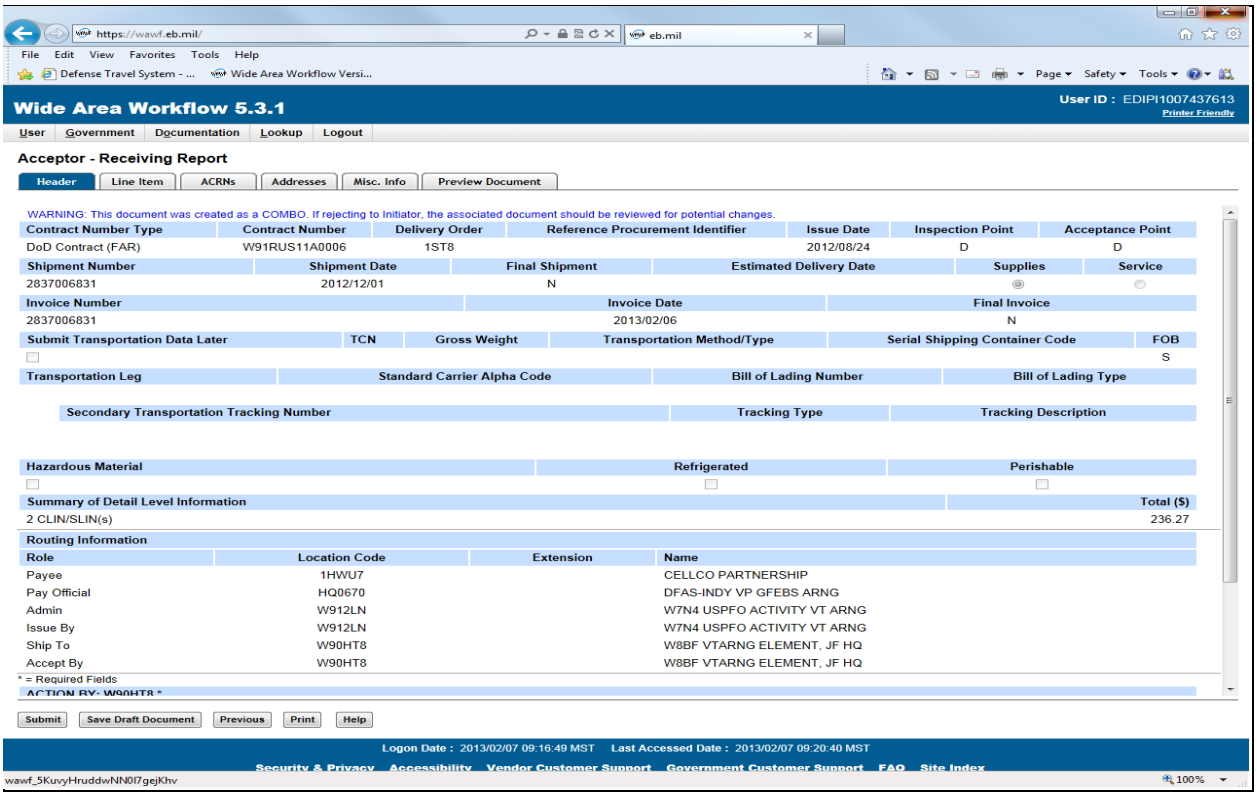
CLICK ON ACCEPTANCE FOLDER



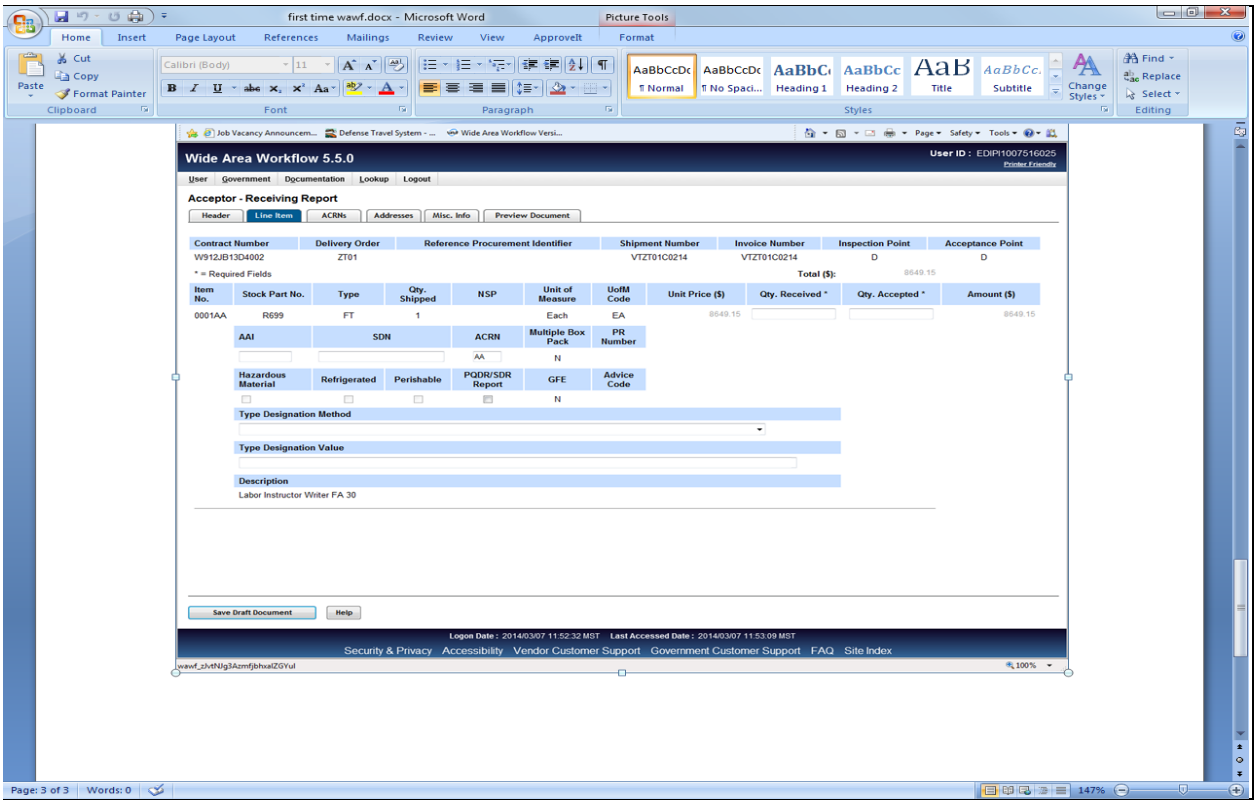
IF YOUR DODAAC DOES NOT DEFAULT THEN SELECT IT FROM THE DROP DOWN.
IN THE CREATE/UPDATE DATE SELECT THE DATE YOU WANT TO SEARCH FROM AND CLICK ON SUBMIT.



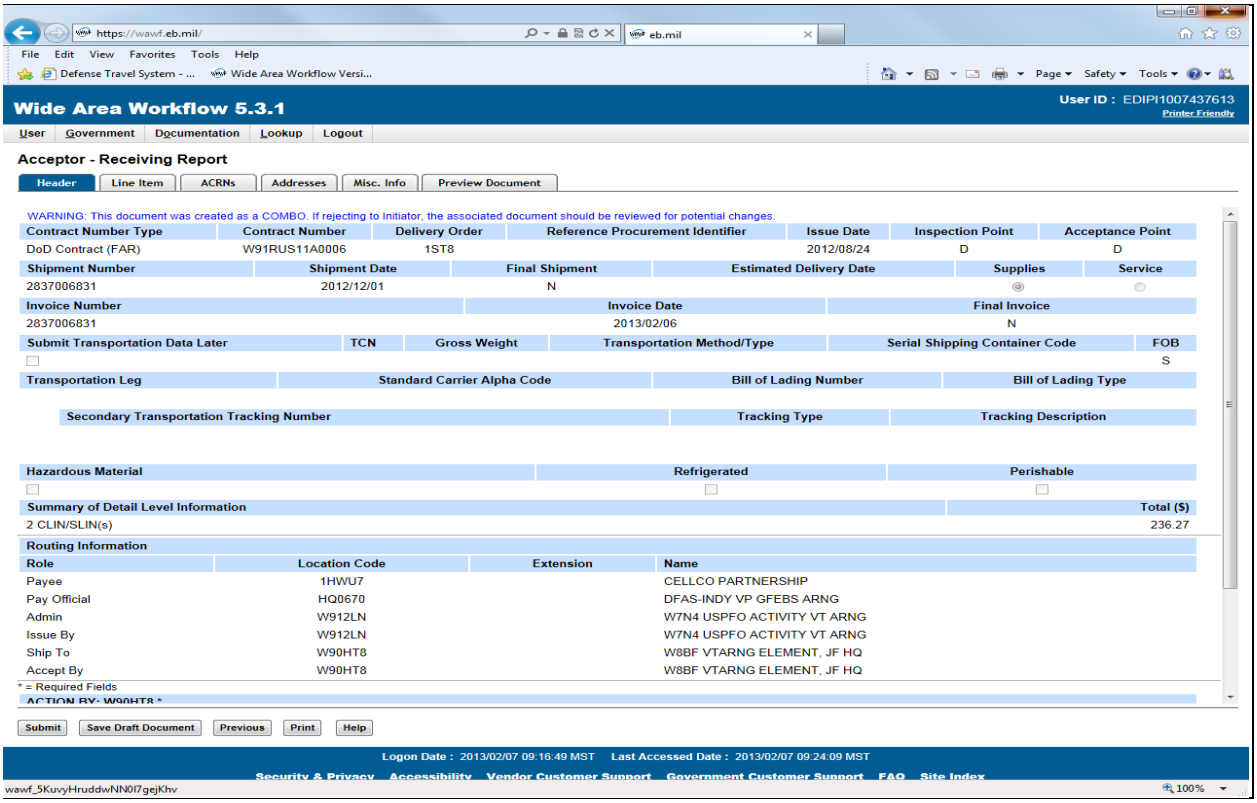
DOUBLE CLICK ON THE BLUE SHIPMENT NUMBER



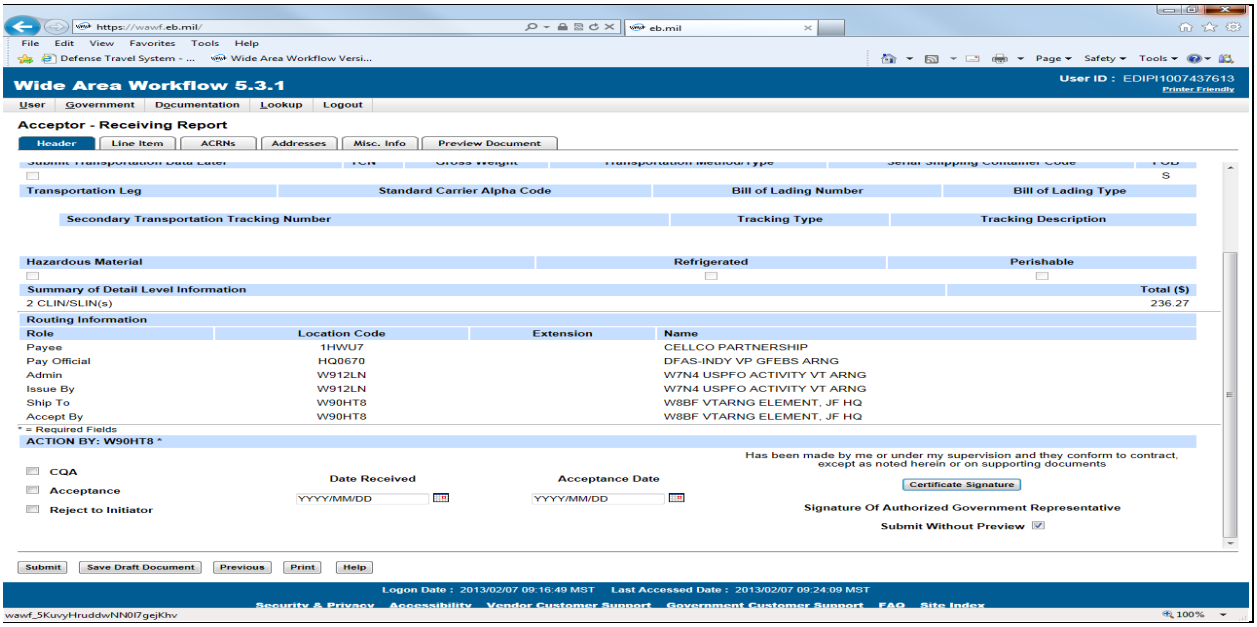
SCREEN WILL DEFAULT TO HEADER TAB… YOU NEED TO SELECT THE “LINE ITEM TAB” JUST CLICK ON IT



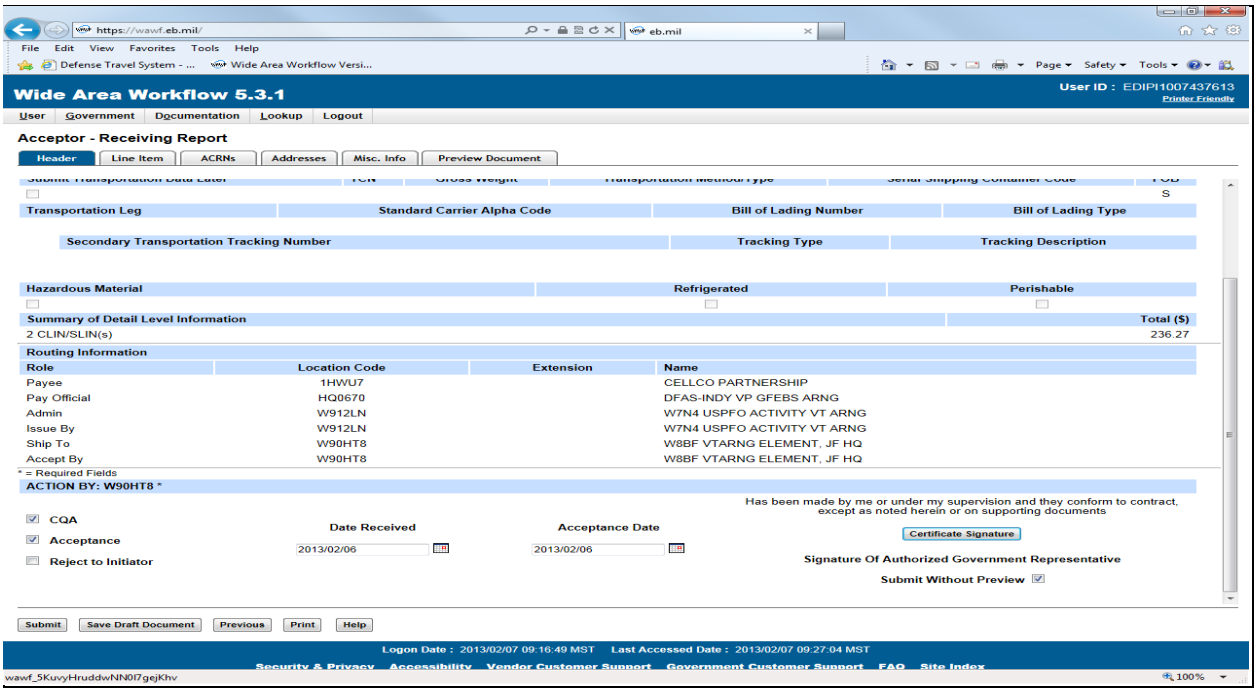
IF YOU AGREE AND INPUT YOUR QUANTITY IN “RECEIVED AND QUANTITY ACCEPTED”
IF YOU DISAGREE CALL MNPF-VP OR EMAIL SO IT CAN BE REJECTED.
NOW YOU NEED TO UPLOAD YOUR DD250 OR THE SIGNED CONTRACT. CLICK ON THE MISC TAB.
SCROLL DOWN AND CLICK ON THE BLUE “ADD ATTACHMENTS” AND UPLOAD SIGNED PAPERWORK.
CLICK ON THE HEADER TAB.

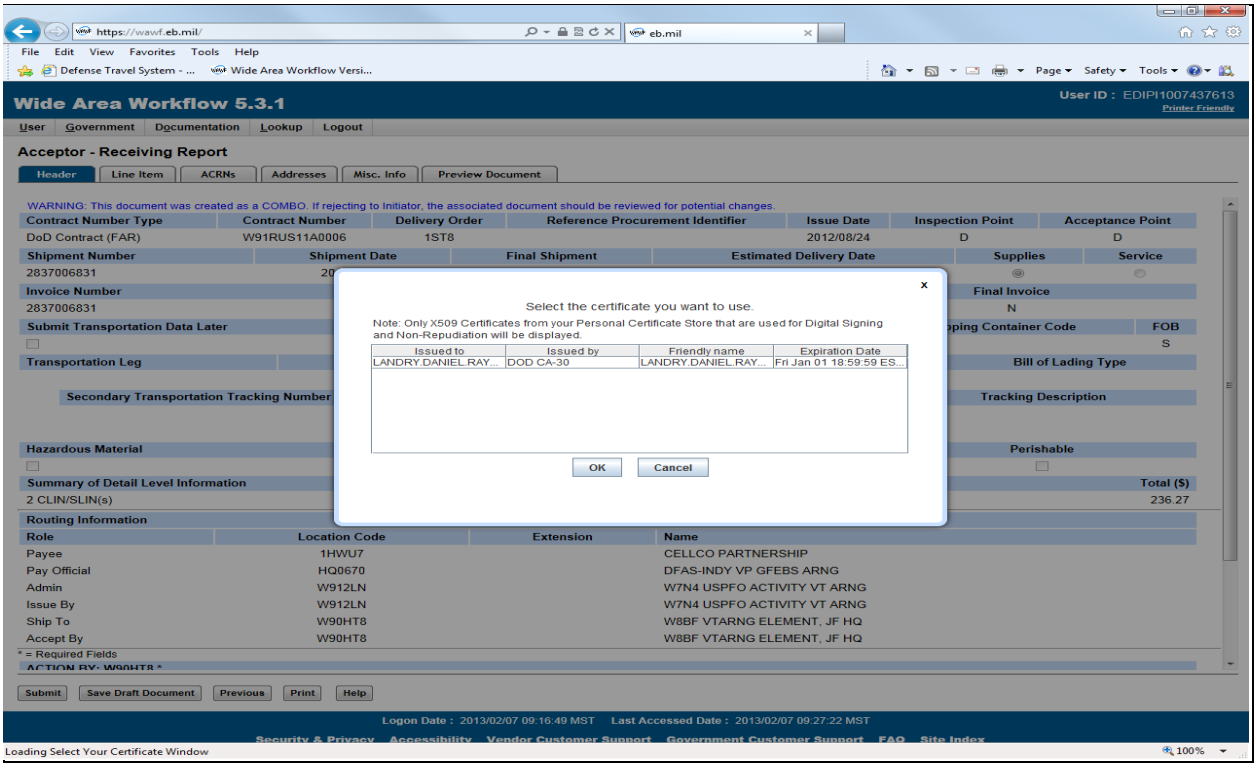


SCROLL DOWN TO BOTTOM OF PAGE

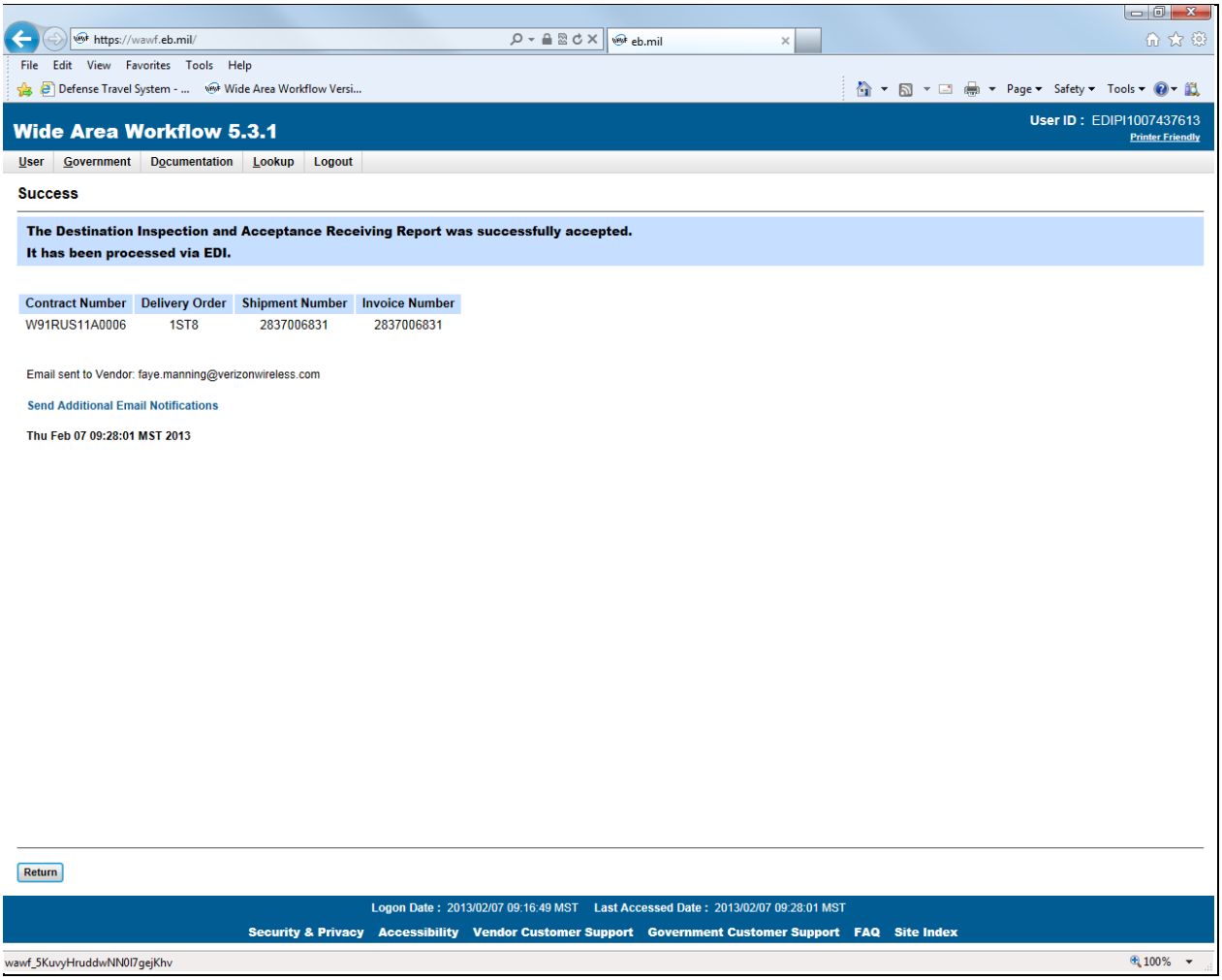


CLICK IN THE BOX THAT SAYS ACCEPTANCE AT FAR LEFT AND BOTH YOUR DATES WILL BE THE DATE YOU RECEIVED THE GOODS OR SERVICES.
CLICK ON CERTIFICATE SIGNATURE





SELECT YOUR NAME AND CLICK ON OK



ONCE YOU SEE THIS … THEN YOUR DONE LOG OFF AND CALL OR EMAIL MNPF-VP.

APPENDIX E

New York Local Purchase Authorization Memo

1. This memorandum is a new requirement for all items that have a National Stock Number (NSN), whether supply is accountable, durable or expendable. The Supply Management Officer must validate that the supplies requested are authorized to be local purchased.

2. Steps to Complete Local Purchase Authorization Memo:

a. STEP 1. Purchase Request Number: this is generated upon saving your PR in GFEBS, input that number.

b. STEP 2. Description: Brief Description of Purchase and Line Item Number (LIN) if applicable and NSN.

c. STEP 3. Choose Box that applies to Purchase, if Army Enterprise System Integration Program (AESIP) non-standard stock number requested, input AESIP request number or MCN in #2, with justification.

d. STEP 4. In para 2 of memo, provide justification for purchase and LIN/NSN or MCN.

e. STEP 5. “Questions may be addressed to”, annotate PBO POC information with phone number.

f. STEP 6. PBO signs and send to Supply Manager Officer for signature.

3. The Supply and Services Division POC that is approving the PR at L3 level will upload the memo to the GFEBS PR and L3.

DEPARTMENTS OF THE ARMY AND THE AIR FORCE
NATIONAL GUARD BUREAU
UNITED STATES PROPERTY AND FISCAL OFFICER FOR NEW YORK
330 OLD NISKAYUNA ROAD
LATHAM, NEW YORK 12110-3514

MNPF-SS Date:_____

SUBJECT: Local Purchase Authorization

To: USPFO-NY, Purchasing & Contracting

Purchase Request Number:_____

Description:_____

1. The Referenced purchase request has been approved for local purchase, IAW AR710-2, for the following reasons:

☐ Request is a bona-fide urgent requirement and delivery from wholesale sources will not t the urgent delivery requirement.

☐ The DoDI 4140.01, DoD Supply Channing Materiel Management Policy; has AAC "K" or "L" or has otherwise granted authority to local purchase.

☐ Item is not in FedLog and is a NS stock number in AESIP.

☐ Local purchase is determined to be in the best interest of the Government in terms of quality, timeliness, and cost that best meet the requirement provided.

2. It is advantageous for the government to purchase the item locally for the following reasons:

_____
_____
_____
_____

3. If item is durable or Non-Expendable. PBO must approve and sign.

Questions may be addressed to _____, phone.

PBO

_____
PBO SIGNATURE BLOCK
RANK, BRANCH
(Work Phone)
(Cell Phone)
(Email)

Supply Management Officer

_____
DEBORAH M. HOLSER
Supply MGT Officer
USP&FO-NY, Supply & Services Division
DSN 489-3700, cml 518-272-3700
deborah.m.holser.civ@mail.mil