

Directions: Approved Purchase List

Purpose

This tool is intended to serve as a list to assist staff in tracking and managing procured products.

- Menu planners can use this information in developing menus.
- Staff managing the delivery of the product will have the information they need to ensure that the correct product is delivered in the correct quantity.
- Staff managing payments can use the information on the list to verify pricing and quantity before approving invoices to be paid.

This tool will also help the CE maintain the documentation required to demonstrate compliance with procurement regulations.

Use This Form	
Frequency	As needed, but intended to track a one year cycle.
Required Form Format	Not required.
Record Retention	Public and charter schools are required to keep documentation related to school nutrition programs for five years. Private schools, other nonprofit organizations, and residential child care institutions (RCCIs) are required to keep documentation for three years.

Making the List More Useful

Depending on the number of products the contracting (CE) procures, it may be more efficient to use a different sheet for each type of product or by food item or component.

Directions:

CE Information

Contracting Entity (CE) Name: Record the name of the CE in designated space.

CE Identification Number (CE ID): Record the CE's ID number in the designated space.

Procurement Year: Record fiscal year for the procurement in the designated space.

Product Specifications

Product Description: Record a brief description of the product in the designated space.

For Example: Beef, ground; beef, pattie; cheese, deli-sliced; chicken nugget; corn, whole kernel; beans, baked; peaches, sliced

Packaging Size: Record a description of way the product is packaged in the designated space.

For Example: 10 lb pkg; case/6 #10 cans; 20 lb pkg/100 pieces

Brand/Supplier: Record the name of the approved brand/suppliers in the designated space.

Unit Price: Record the unit price as packaged for the product in the designated space.

For Example: \$27.75 per case; \$190.00 per pkg

Delivery Information: Record how often the CE expects the product to be delivered and locations of delivery in the designated space.

Attach additional documentation as appropriate to this form.