

Micro-Purchase Log

(Use this form for purchases with a total aggregate cost of equal to or less than \$10,000 (effective January 1, 2019) when the micro-purchase option is the method of procurement.)

CE Name: _____

CE ID: _____

Procurement Year: _____

| Date of Purchase | Contractor/ Supplier Name, Address | Product(s) and/or Service(s) Purchased <i>(Quantity + Description)</i> | Unit Price for Each Item | Total Aggregate Cost | Rational for Using Micro-Purchase & Method Used to Determine That Cost of Each Item Is Reasonable <i>(Attach Relevant Documentation)</i> |
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Signature of Person Completing This Form:

Date:

Directions: Micro-Purchase Log

Purpose

This tool is intended to serve as a log for informal micro-purchases—aggregate single purchases of less than or equal to \$10,000.¹ This type of tool also helps the contracting entity (CE) to maintain the documentation required to demonstrate compliance with the micro-purchase regulations.

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 year in the designated space.

Date of Purchase: Record the date of micro-purchase in the designated space.

Contractor/Supplier Name, Address: Record contractor or supplier name and address in the designated space. CE's are required to spread micro-purchases among a variety of contractors or suppliers.

Product(s) and/or Service(s) Purchases (Quantity + Description): List the product(s) and/or service(s) included in the aggregate total for this purchase in the designated space.

For Example: 5 gallons of 1% white milk

3 pkgs (packages) of 8 count hamburger buns

Unit Price for Each Item: Record the amount of each unit purchased in the designated space.

Total Aggregate Cost: Record the amount of total aggregate cost for the invoice/receipt in the designated space.

The CE must also retain the invoice/receipt for this purchase with this form or with other financial records as determined by the CE's financial management system.

[NOTE: While a canceled check and a debit card bank statement are appropriate secondary support documentation, they do not serve as business invoice or receipt.]

| 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. |

¹ Effective January 1, 2019

Rationale for Using Micro-Purchase Method & Method Used to Determine That Cost of Each

Item Is Reasonable: Record a descriptive statement that explains (1) why the micro-purchase method is the most suitable procurement method for the purchase and (2) what method the CE used to ensure that the cost of the product(s) and/or service(s) was reasonable in the designated space.

[NOTE: CEs must not break larger purchases into small purchases in order to circumvent the procurement requirements for the small purchase method or formal purchase methods.]

If the CE is located in a remote area and does not have access to a variety of contractors or suppliers, the person completing the form needs to add a note about this situation in this space to explain this limitation in the designated space.

Signature of Person Completing This Form: Ensure that the person contacting the contractors/suppliers and completing the form signs the form in the designated space.

Date: Record the date the person completing the form signs the completed form in the designated space.

Attach additional documentation as appropriate to this form.