



United States Department of the Interior

OFFICE OF THE SECRETARY

Washington, D.C. 20240

National Policy Memorandum

Assistant Secretary - Indian Affairs
Deputy Assistant Secretary – Indian Affairs (Management)

Number: NPM-ACQU-09

Effective: 3/04/2015

Expires: 3/04/2016

Title: Purchase Requests

1. Purpose

The purpose of this policy is to clarify and standardize the purchase request (PR) process using the Indian Affairs (IA) Financial Business Management System (FBMS) for the acquisition of supplies (\$3,000) and services (\$2,500) over the micro-purchase threshold.

2. Scope

This policy applies to all IA headquarters, field, and program staff under the authority of the Assistant Secretary - Indian Affairs (AS-IA), including the Bureau of Indian Affairs (BIA) and the Bureau of Indian Education (BIE).

3. Policy

IA will adhere to the Department of the Interior's (DOI) policy regarding PRs, which can be found in Department of Interior Guidance Release 2014-02.

4. Process and Procedures

Effective immediately, a PR must be prepared in FBMS for the following actions:

- All new acquisition awards over the micro-purchase threshold, regardless of funding (i.e., new purchase orders, delivery/task orders, blanket purchase agreements/calls, contracts);
- New acquisition actions under the micro-purchase threshold, if awarded through FBMS rather than the DOI integrated charge card. (Note: the integrated charge card should be used to the maximum extent practicable.)
- All new interagency agreements (IAAs);
- All new intra-agency agreements;
- All new financial assistance instruments;
- Monetary increases to existing acquisition awards, financial assistance instruments, or IAAs;

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New

- Modifications to correct line items or funding on awards made through FBMS, due to errors, that require deobligating funds and obligating new funds;
- Deobligations of \$25,000 or greater from acquisition awards, financial assistance instruments, or IAAs (other than those resulting from the close out process).

FBMS PRs shall *not* be required for the following situations:

- Administrative changes to acquisition awards, financial assistance instruments, or IAAs (i.e., vendor address, Contracting Officer Technical Representatives (COTRs), delivery addresses, etc.);
- All deobligations of acquisition actions, financial assistance instruments, or IAAs in any amount resulting from the close out process;
- Deobligations of amounts less than \$25,000 from acquisition actions, financial assistance instruments, or IAAs.

Deobligations that do not require a PR must have adequate documentation, such as an e-mail from the program office, indicating the amount and line of accounting of the deobligation. Documentation included in the acquisition file may consist of contemporaneous emails, memoranda to the file, or other written communications, as well as other documentation relating to the project status or billings. The documentation **must** be maintained in the acquisition file with the modification.

Funds remaining on an acquisition with no payment activity for the most recent 12-month period can be presumed to be no longer needed and the deobligation process should begin, unless the program office provides a written justification to the contracting officer explaining the reason for the inactivity and the continued need for the balance.

5. Roles and Responsibilities

- A. The Deputy Assistant Secretary – Indian Affairs (Management)** is responsible for administering this policy.
- B. The Bureau Procurement Chief** is responsible for developing acquisition policy at IA.
- C. The Supervisory Contracting Officers** are responsible for ensuring that acquisition personnel follow this and any related policy.
- D. Acquisition personnel** are responsible for following this and any related policy.

6. Approval



Thomas D. Thompson
Deputy Assistant Secretary – Indian Affairs (Management)

3.4.2015
Date