



Procedure Title: Material Intake

Procedure #: 260

Page 1

Section: Operations

Date of Implementation: June 17, 2010

Procedure Statement:

This procedure describes how to receive material from others that is used in production of their product(s) and how to use a Material Intake Form.

Definitions:

Material - Substance or component that are used in production or manufacturing, it can be a finished product or an unprocessed raw material.

Procedure:

A material, for the purpose of this procedure, is NOT purchased by The Flower Cart, it is delivered to The Flower Cart for production or manufacturing by, or on behalf of, a customer.

Customized Material Intake Forms:

In collaboration with our customers, employees of The Flower Cart will create a specific Material Intake Form for each ingredient, label, or package we handle for each customer.

The customer approves all the information: product name, size and shape of packaging, lot numbers/best before dates, supplier information, storage and critical handling instructions, allergens and discussion re identification of allergens on product labels, etc. It is the responsibility of the employee who negotiates with the customer for ensuring that all information is up to date.

These forms are named as follows: Material Intake Form – *Ingredient or item name* - *year* - for example, Material Intake Form – Dark Camino – 2016

These customized forms are saved on The Flower Cart file tree under FC Data/Customers & Contracts/Customers/*Customer Name*/Material Intake/Customized Forms

Completed Material Intakes:

Any time we accept anything on behalf of a customer – ingredients, packaging, labels, etc – we conduct a material intake and record the results of that process on the appropriate customized forms. We make any changes needed (for example, if the ingredient came from a different supplier than previously identified, or a different delivery company was used) and we note the particulars (amounts delivered, lot numbers, best before dates, allergen identification markings done, any damages, etc).

These completed intakes are named as follows: *Ingredient or item name* - *month, day, year* - for example, Dark Camino – December 9th, 2016

These completed intakes are filed on The Flower Cart file tree under FC Data/Customers & Contracts/Customers/*Customer Name*/Material Intake/Completed Intakes/*year*- for example, Just Us/Material Intake/Completed Intakes 2016.

Details:

1. Employees who receive material follow this Material Intake Procedure, use the Material Intake Receiving Procedure Checklist (See Appendix A) and utilize the customized Material Intake Form for each item received (See separate document 260a)
2. The procedure is used for material received at all facilities of The Flower Cart.
3. A material intake is conducted and the form is filled out at the time of transferring material from a delivery vehicle to property of The Flower Cart, and before the material is put into storage.



- a. Good practice is to proactively ensure we have a customized Material Intake Form when we become aware of a pending shipment. Plans for unloading and storage need to be made ahead of time.
4. A Material Intake Form is filled out whenever material is received.
5. If a Material Intake Form cannot be completed when material is received, the material is not accepted into the facility or it is stored in an area of the facility under “quarantine” until the Material Intake Form is completed.
6. An employee quarantining material:
 - a) Ensures the quarantined material is stored in an area of the facility away from where it will eventually be used in production or manufacturing
 - a. Good practice is that if you don’t know how a material is to be stored it should not even be accepted into quarantine.
 - b) Fills in and posts a quarantine notice on the quarantined material. This notice clearly identifies the fact that the material is quarantined and cannot be used (See Appendix B).
 - c) Notifies the employee who negotiates with the customer that material has been quarantined and its location.
 - d) Posts the partially completed Material Intake Form with the quarantine notice.
 - e) Is responsible to ensure that the Material Intake Form is completed and the material is released from quarantine or that the quarantined material is sent back to the customer.
 - f) In the absence of the employee that quarantines a material the responsibility for a quarantined material falls to the supervisor. In the absence of both the employee and the supervisor the responsibility falls to the supervisor’s designate.
 - g) When an employee completes the Material Intake Form and releases a material from quarantine, the quarantine notice is filed with the Material Intake Form.
7. Once Material Intake Forms are filled out they are returned to the Administrative Assistant at 9412 Commercial Street.
8. The Administrative Assistant at 9412 Commercial Street is responsible to ensure that all Material Intake Forms are typed up, saved on the server, and that employees who use the materials have hard copies for their binders.
9. Customized Material Intake Forms and completed Material Intake Forms are stored in a location that is readily available to employees of The Flower Cart.

Related Information:

Contact:

Human Resources Department

Roles and Responsibilities:

Employees

- Create a specific Material Intake Form for each ingredient, label, or package for all customers
- Ensure that all information on the Material Intake Form is up to date.
- Save customized forms and completed intakes on the server
- Make changes as needed to the customized forms
- Complete Material Intake Forms whenever material is received
- If the Form cannot be completed when the material is received, quarantine the material
- Return completed Material Intake Forms to the Administrative Assistant at 9412

Administrative Assistant

- Ensure that all Material Intake forms are typed, saved on the server, and hard copies are given to employees for their binders

Revision History:

October 13, 2010, May 2012, April 2016, October 2016



Appendix A: Material Intake Receiving Procedure Checklist

Date: _____

Person receiving: _____

Product being received from (Customer's name): _____

When notified that an order is expected

- ensure that we have the correct Material Intake Forms for any product that will arrive
- print the Material Intake Forms required
- understand the storage requirements, and make a plan for storage of the order
- make a plan for having the right amount of people on-site to handle loading when the order arrives
- ensure that a camera will be available when the order arrives

When the order arrives

- get the camera and the Material Intake Forms and paper and pen
- ensure that we have the people needed for loading product into our building(s) – We do NOT unload trucks.
- greet the person doing the delivery, and identify yourself as the person receiving the order
- until the material is on the ground and in our possession, **remain well back** from trucks with lift-gates and/or pallette jacks that are being unloaded - **stay back and ensure everyone's safety and let the delivery driver do his/her job when unloading is occurring**
- locate the packing slip for the product being received (if no packing slip, make notes)
- check the items received against the packing slip, noting any discrepancies
- note quantity received and condition of product – if any concerns (spoilage, damage, overage or underage) document in writing and with photographs – and discuss with delivery driver
- if no packing slip, record suppliers name, date received, product name/description, quantity received, condition of product
- using Material Intake Form(s), record lot numbers of all products received (if multiple items have the same lot number, record it as follows – for example, 10 bags of sugar all with same lot number: lot # 4241 x 10)
- using Material Intake Form(s), record best before dates/expiry dates

Once the order is packed away

- send the completed Material Intake originals and packing slips to the Administrative Assistant
- file completed Material Intakes electronically on The Flower Cart file tree under FC Data/Customers & Contracts/Customers/*Customer Name*/Material Intake/Completed Intakes/*year*

Appendix B

Quarantined Material Do Not Use

Quarantined by: _____ Date: _____
(Please see me for further information)

Release from quarantine by: _____ Date: _____
(File this quarantine notice with the completed Material Intake Form)