

Research Material Procurement and Receipt Checklist

Keep the requested item, commercial records, received shipment, and supporting documents connected without turning one into evidence for another. Use one worksheet per order line; link additional receipt blocks when a shipment is split. This checklist records administrative evidence for non-clinical research procurement. It supplies no product finding, supplier assurance, or prefilled purchase decision. Unknown information stays visible, and a carrier delivery event does not complete the document review.

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Order-line review reference

Project or internal request reference

Recorder / actual role / date started

Responsible purchasing reviewer / actual role

1. Record the requirement before the order

Copy the requested item description and catalog reference from the originating specification. Record package count and package description as commercial fields; these are not measured findings. List which documents the organization expects, which item they should identify, and when they are needed. Keep the governing specification version with the quote. If a requirement changes, retain the earlier version and the dated explanation so a later reader can see which request governed the order.

- ☐ Locate the originating request or specification and its version.
- ☐ Record the exact item reference, requested package description, and package count.
- ☐ List required documents and the expected item or lot connection for each.
- ☐ Record the organization's review owner and any unresolved requirement.

Request or specification reference / version / date

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Requested material description / catalog reference

Requested package description / number of packages

Document requirement / expected item connection / needed-by date

Requirement change reference and reason, if any

Unresolved requirement / responsible reviewer

2. Inventory the supplier's document response

Save the quotation and actual attachments, with their filenames, issuer details, and printed revision dates. A promise to provide a document is different from receiving it. For each requested file, record whether it arrived, whether it opens, and which item it describes. OSHA's SDS framework places identifiers in section 1 and revision information in section 16; use those headings to locate the supplied information, not to certify compliance. An SDS does not substitute for a COA or an item-to-lot connection.

- ☐ Match the quote to the requested catalog item and specification version.
- ☐ Record each attachment actually received and its source.
- ☐ Check the applicable SDS identifier and preparation or revision date where available.
- ☐ Keep promised, received, readable, and matched document statuses distinct.

Supplier name as shown / quotation reference / date

Document requested / date requested

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Attachment received / filename / saved location

Printed issuer / item identifier / revision or preparation date

Document status and evidence location

Promised but unreceived document / follow-up reference

3. Keep order, payment, and shipment events separate

Record only events supported by the corresponding order confirmation, payment record, or carrier record. The checkout message, proof of payment, and shipment history answer different questions. Preserve their dates and references separately, including the date the carrier history was checked. For split orders, name the order lines and package counts each shipment claims to cover. A carrier status concerns movement or delivery; it cannot establish package contents or complete an analytical document review.

- ☐ Locate the purchase confirmation and identify the order line it covers.
- ☐ Record payment status from the available payment evidence without inferring shipment.
- ☐ Record shipment references and the carrier status actually displayed.
- ☐ Track split shipments and unreceived order lines individually.

Order confirmation reference / date / order line

Quoted line price and currency / commercial source

Payment status / evidence reference / date

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Shipment reference / claimed order-line coverage

Carrier status / event date / date checked

Outstanding packages or order lines

4. Create a dated receipt observation

Record the receipt date, who made the observation, package count, and accessible label text under the organization's receiving process. Identify any photograph or packing slip used as evidence. State when labels cannot be read or an observation was not made; do not copy the expected item description into the observed field. Packaging appearance and carrier timing are observations, not analytical or stability findings. This worksheet supplies no opening, handling, or storage procedure.

- ☐ Record the actual receipt event separately from the carrier's delivery entry.
- ☐ Count observed packages and transcribe accessible labels as seen.
- ☐ Identify the packing slip and any appropriately restricted receipt photographs.
- ☐ Describe visible discrepancies without inferring their effect on the material.

Receipt reference / date and time / observer's actual role

Packages observed / packing slip reference

Accessible label wording / item identifier / lot as observed

Label photograph or observation-note location

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Unreadable or unobserved fields

Visible packaging discrepancy and observation location

Applicable receiving-process reference

5. Reconcile the line, receipt, and document set

Compare the ordered item, observed label, packing slip, and supplied documents field by field. Record a partial match when only some identifiers align. Route detailed report questions to the separate COA review checklist and retain its reference. If shipping-condition records were promised, identify whether they arrived and which shipment they cover; their meaning requires appropriate review. Receipt, document completeness, and an institutional decision remain separate findings.

- ☐ Compare the ordered item and accessible received label against the packing slip.
- ☐ Map each supplied document to the specific order line and observed lot, where supported.
- ☐ Record missing or conflicting identifiers without substituting the expected value.
- ☐ Link the COA review and any shipment-document review by their actual references.

Ordered item / observed item / packing slip comparison

Observed lot / document lot / supporting mapping reference

Documents required / documents matched / unmatched documents

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COA checklist reference / unresolved report questions

Promised shipment record / received filename / shipment covered

Unresolved mismatch or unsupported connection

6. Preserve follow-up and the review decision

Make a dated issue entry for each missing document or discrepancy. Record the requested evidence, the person responsible for follow-up, and the actual response when available. NIH's scientific record-keeping guidance supports clear, dated records with identifiable corrections in its own intramural context; it is background for this proposed workflow, not a private procurement requirement. Keep the initial receipt note and append later information. Restrict contact, address, and payment details to the records that need them.

- ☐ Give each unresolved issue a reference, owner, and target review date.
- ☐ Retain the initial observation and append the dated clarification.
- ☐ Close only the issue answered by the response and cite its evidence.
- ☐ Record the responsible organization's decision and its basis separately from receipt.

Issue reference / original observation date

Evidence requested / follow-up owner / target review date

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Response reference / date received / question answered

Remaining gap / next action

Receipt-record status / document-review status

Organization's decision, if made / evidence basis

Decision recorder / actual role / date

Restricted record location / shared-copy redaction note, if needed

7. Professional-review limitation

This administrative checklist cannot evaluate material identity, analytical quality, stability, workplace hazards, or fitness for a project. Questions about those matters need the responsible organization's qualified scientific, quality, or safety reviewer and the applicable records and procedures. A received parcel, matched document set, or completed worksheet does not certify a supplier or establish approval. The toolkit makes no legal compliance determination and sets no handling conditions.

- ☐ Route unresolved technical or safety questions to the appropriate responsible reviewer.
- ☐ Record any professional assessment's scope, evidence, and actual reviewer role.
- ☐ Keep receipt and administrative completion separate from technical acceptance.

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Question requiring professional review, if any

Responsible reviewer / actual role / applicable procedure

Assessment reference and date, if available

Source references

NIH Office of Intramural Research: Guidelines and Policies for the Conduct of Research, Scientific Record Keeping

https://oir.nih.gov/system/files/media/file/2025-01/guidelines-conduct_research.pdf

OSHA: 1910.1200 Appendix D, Safety Data Sheets

<https://www.osha.gov/laws-regs/regulations/standardnumber/1910/1910.1200AppD>

A completed checklist is not proof of identity, purity, sterility, safety, legal compliance, or project suitability. Keep missing information visible; obtain qualified review for consequential decisions.