



Qualified Receiver (QR) Quick Reference Guide

This guide is an overview and may not include all the policies applicable, so be sure to check the [CPPM](#) and other resources for more detail.

Qualified Receiver (QR)

What/Who is a Qualified Receiver:

- A government employee (not a contractor or volunteer);
- Cannot be the Expense Authority on the same transaction;
- Provides assurance to the Expense Authority by being knowledgeable that the goods and/or services have been received in accordance with purchase request or contract provisions;

A Qualified Receiver's Responsibilities are to:

- Ensure contractual terms and conditions are met;
- Inspect and review goods and/or services received;
- Certify that the work/services have been completed in accordance with the contract specifications;
- Seek clarification from other experts as required;
- Answer any questions that may arise regarding the receipt of the goods or services;
- Provide assurance to the Expense Authority.

QR Checklist

Step 1 Gather Applicable Documentation:

- Invoice
- Contract/Agreement
- Schedule of deliverables
- Supporting documentation (receipts, reports, etc)

Step 2 Review Invoice for Correctness and/or Inspect Goods:

- Legal name and Address
- Contract number or project is identified
- Goods are as ordered
- Correct amount has been received
- No damage is apparent

Step 3 For contract services, compare invoice with agreement (Schedule B):

- Amount is within the maximum allowed
- Work performed is within the terms of the agreement
- Hours worked are identified (if applicable)
- Hourly/daily rate is correct
- Who did the work (key personnel required)
- All expenses allowed, verify receipts/invoices
- Taxed appropriately (reasonable, no double dipping tax on tax)

Step 4 For contract services, compare the goods/services received with agreement (Schedule A);

- Appropriate deliverables are met and may include:
 - # of units delivered
 - Scope of report (e.g. # of samples used)
 - Format of reports
 - # of presentations

**QR
Confirmation
Methods**

Step 5 Confirm receipt as appropriate:

1. Enter a receipt into the iProcurement financial system directly
2. Sign a goods and services received stamp directly on invoice
3. Forward an email, or invoice for payment via email, confirming that goods and services have been received.



**Print your name underneath
to identify your signature.**

When forwarding an invoice for payment via email, the QR must indicate in the body of the email that goods and services have been received, the nature of the transaction being approved, and the amount.

For example:

- “Goods and services received – Staples invoice number 1512 for \$129.95”
- “Goods and services received – Sept 3/16 BMO Statement - \$2,376.75”

Alternatively, QRs can respond to an email forwarded to them with invoice and information outlined in body of the email.

For example:

- Please confirm goods and services have been received – Staples inv #1512 for \$129.15”

QRs should not be forwarding invoices for payment without confirmation in the body of the email that goods and services have been received as well as information that identifies the expense.

NOTE: If confirming receipt via your mobile phone, please ensure your full name and position are included in the signatory.

For more information and other resources, click on following links:

[QR Training Video](#)

[Core Policy and Procedure Manual \(CPPM\) – Qualified Receiver](#)

Government wide policies and procedures

[Financial Services Site – Qualified Receiver Section](#)

Natural Resource Sector policies and procedures

[A Guide to GST on Contractor Expenses](#)

Natural Resource Sector policies and procedures

[NRM Expenditure Management Controls](#)

Natural Resource Ministries expenditure guidelines

[CSNR AP-PO Reference Manual - iProcurement Requisition Entry and Receiving](#)

How to receive in the iProcurement system

[Financial Policy and Compliance Advice](#)

Advice on financial policies (travel, BMO, BEA etc.)

[Contract Policy Support](#)

Contract and procurement questions

[Financial Systems Helpdesk](#)

Questions on iProcurement system and/or access

**Training and
Resources**

Contacts

