

**File Documentation
For
Non-IT and IT
Leveraged Procurement Agreements**

Purchase Document No: _____

Product Description: _____

Buyer: _____

Order of appearance:

| Item | Post Award and/or Closeout Activities | Applicable | N/A | In File |
|------|--|------------|-----|---------|
| 1. | General Correspondence: • Letter of State's Acceptance of deliverables or equipment, as applicable. | | | |
| 2. | Payment History | | | |
| 3. | Stock Received Report | | | |
| 4. | Stock Returned Report | | | |
| 5. | Supplier Performance Report • Delivery/Acceptance Documentation | | | |
| 6. | Contractor Evaluation (STD.4), applicable | | | |
| Item | Leveraged Procurement Agreement Category | Applicable | N/A | In File |
| 7. | <input type="checkbox"/> California Multiple Award Schedule (CMAS) <input type="checkbox"/> Software License Program (SLP) <input type="checkbox"/> Statewide Contracts (SC), includes SCs executed under the Strategic Sourcing Initiative <input type="checkbox"/> State Price Schedules (SPS) <input type="checkbox"/> Master Service Agreement <input type="checkbox"/> Master Rental Agreement <input type="checkbox"/> Master Price Agreement (WSCA) | | | |
| Item | Purchase Document | Applicable | N/A | In File |
| 8. | <input type="checkbox"/> Non-IT <input type="checkbox"/> Purchasing Authority Purchase Order (STD.65) Attachments (i.e. Agency special provisions), as applicable. <input type="checkbox"/> Standard Agreement, (if using the non-IT Business Consulting Management MSA) | | | |
| | • Amendments to executed purchase documents will be filed in sequential order with the most current amendment on top | | | |
| | <input type="checkbox"/> Information Technology (IT) <input type="checkbox"/> GSOP 191-2 or GSOP-206 <input type="checkbox"/> Purchasing Authority Purchase Order (STD.65) <input type="checkbox"/> Attachments, (i.e. Agency Special Provisions or Statement of Work) as applicable. | | | |
| | • Amendments to executed purchase documents will be filed in sequential order with the most current amendment on top. | | | |

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| Item | Assessment and Selection Documentation | Applicable | N/A | In File |
|---|---|-------------------|------------|----------------|
| 18. | <u>Best Value Determination Worksheet</u> using the suggested form or by similar document to summarize the procurement activity leading up to the supplier determination | | | |
| | <u>Assessment and Selection Report</u> using the suggested form or by similar document to summarize the procurement activity leading up to the award. | | | |
| | <u>Master Agreement</u> – Review the user instructions contained within the individual MA and use any forms indicated within the contract terms and conditions. | | | |
| Item | Pre-Procurement Requirements and/or Approvals | Applicable | N/A | In File |
| 19. | <u>Pre-Approval Documentation</u> | | | |
| | <ul style="list-style-type: none"> • Desktop and Mobile Computing Justification notation or documentation, in accordance with the department's policies and procedures and PAM. | | | |
| | <ul style="list-style-type: none"> • IT transactions valued less than \$100,000.00, notation and/or acceptable documentation in accordance with department's policies and procedures and PAM | | | |
| | <ul style="list-style-type: none"> • IT transactions valued over \$100,000.00, a "Certification of Compliance with SAM 4819.32 by the director or designee | | | |
| | <ul style="list-style-type: none"> • Telecommunications approval, as applicable | | | |
| | <ul style="list-style-type: none"> • Vehicle Acquisition Request form | | | |
| | <ul style="list-style-type: none"> • Prison Industry Authority (PIA) Waiver Request | | | |
| | <ul style="list-style-type: none"> • PIA Request for Modular Systems Furniture | | | |
| | <ul style="list-style-type: none"> • Surplus Property, as applicable | | | |
| | <ul style="list-style-type: none"> • Finance Approval, as applicable, if purchasing used equipment | | | |
| | <ul style="list-style-type: none"> • CSSI/SC Exemption Request, as applicable | | | |
| <ul style="list-style-type: none"> • DVBE Participation Waiver signed by Department Director or designee, as applicable. | | | | |
| Item | User Request and General Documentation: | Applicable | N/A | In File |
| 20. | <u>Department Requisition</u> <ul style="list-style-type: none"> • Provides customer details in terms of quantities, description, specifications, technical requirements, funding and signature approvals. | | | |