

## IT-INTERAGENCY AGREEMENT (IAA) (STD 213) PREPARATION & SUBMISSION CHECKLIST

The following check list has been prepared to assist you in the preparation and submittal of your IT/IAs (STD 213) to the Procurement Division (PD), One Time Acquisitions (OTA) unit.

Item	Description	✓
Email from the Department of Technology confirming purchase is not a Reportable Project	<p>If your request is related to a "Reportable Project", please submit your request to the California Department of Technology (SAM 4819.37). Refer to BB P-10-13:  <a href="http://www.documents.dgs.ca.gov/pd/delegations/pac091113_P-10-13.pdf">http://www.documents.dgs.ca.gov/pd/delegations/pac091113_P-10-13.pdf</a></p> <p>List of Agency Assigned Dept. of Technology            Contacts: <a href="http://www.cta.ca.gov/Contact_Us/staff_assignments.html">http://www.cta.ca.gov/Contact_Us/staff_assignments.html</a></p> <p>List of existing Reportable Projects: <a href="http://www.cta.ca.gov/Government/IT_Policy/IT_Projects/index.html">http://www.cta.ca.gov/Government/IT_Policy/IT_Projects/index.html</a></p>	
Agreement (STD 213 with STD 215)	<p>Completed with original (wet) signatures.            STD 213/213A - Four (4) originals signed (including SOW and all attachments/exhibits)            STD 215 – Two (2) originals signed</p>	
Agreement (STD 213A with STD 215)	<p>Reference SCM Vol. 3. 8.6.4., Retain the original contract start date and only change the end date.</p>	
Statement of Work (SOW)	<p>Attached to the 213, submit written description of work to be performed in <b>MS Word format</b>. Refer to SCM Vol. 3, Ch. 2, Section B, Topic 5.1 (2.B5.1)</p>	
GIA – 610 General Terms and Conditions for IAA	<p>STD 213 must include GIA-610: the General Terms and Conditions for IAAs. Refer to <a href="#">PD-OLS website</a> to get the latest version of the IAA General Provisions.</p>	
Mission Critical Certification w/signatures	<p>Must be signed (wet signature) by Agency Secretary or Director or authorized designee and submitted with PE.            Refer to SCM Vol. 3, Ch. 2, Section B, Topic 4 (2.B4.15)</p>	
Pre-Procurement Reviews and Approvals	<p>Certain classes of purchases that may require review and approval before a department can proceed with a purchasing activity.            Refer to SCM Vol. 3, Ch. 2, Section C</p>	
Certification of Compliance with State IT Policies (Revised 9-2014)	<p>IT Procurements valued at \$100,000 or more that are in support of a development effort. Refer to SAM <a href="#">4819.41</a>, <a href="#">4832</a> and SCM Vol. 3, Ch. 2, Section C, Topic 6 (2.C6.0)</p>	

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Internal IT Approval	<p>IT Procurements under \$100,000.</p> <p>Provide documentation as to how the acquisition was authorized. Acceptable forms of documentation are:</p> <ul style="list-style-type: none"> <li>• Desktop and Mobile Computing Policy (DMCP Form)</li> <li>• Approved FSR Transmittal or S1BA</li> <li>• PIER approval letter, Identifying how acquisition is excluded from SAM 4819.32</li> <li>• ITAP</li> </ul> <p>Refer to SCM Vol. 3, Ch. 2, Section B, Topic 7 (2.B7.0) and Topic 6 (2.C6.2)</p> <p>“Sample” DMC Form: <a href="http://www.documents.dgs.ca.gov/pd/pestatus/DMC.doc">http://www.documents.dgs.ca.gov/pd/pestatus/DMC.doc</a></p>	
Prior Agreement	Copy of prior Agreement and all amendments if request is for a renewal of services or like items.	
Feasibility Study Report (FSR) with approval signatures and FSR number  <p style="text-align: center;"><b>OR</b></p> Project Approval Life Cycle – Stage 1 Business Analysis	<p>For IT Projects - Submit FSR, documentation of scope, costs, benefits, schedules and methodologies and PIER if applicable.</p> <p>Refer to SCM Volume 3, Ch. 2, Section C, Topic 3.1 (2.C3.1)</p> <p>Refer to CTA letters** TL 12-1, TL 12-17 &amp; TL 13-03</p> <p><a href="http://www.cio.ca.gov/Government/IT_Policy/TL.html">http://www.cio.ca.gov/Government/IT_Policy/TL.html</a></p> <p><b>NOTE:</b> After July 1, 2015 utilization of FSRs is discontinued. Refer to Department of Technology TL-<a href="#">14-07</a> and <a href="#">15-02</a>.</p>	
Property Survey Report Form (Std.152)	<p>Trade in of state property if applicable.</p> <p>Refer to SCM Vol. 3, Ch. 10, Topic 7, <a href="#">SAM 350.3</a></p>	
Cost Worksheet	If applicable. For more than 10 line items.	
Telecommunication Goods and Services	Send all acquisitions for Telecommunication Goods and Services to the California Dept. of Technology for processing per PCC 12120.	
Late submittal	Contracts or amendments should be submitted to the DGS/PD a <b>minimum</b> of 10 working days prior to contract start date. While not normally accepted, late submittals may be considered if the contracting agency or department provides written certification of the good causes for lateness. The certification must be signed by the Department's Director (or designee). Certifications for excessively late contracts or amendments must be signed by the Agency Secretary or Undersecretary (or designee).	