

PURCHASE ESTIMATE CHECKLIST

The following check list has been prepared to assist you in the preparation and submittal of your Purchase Estimate (PE) (Std. Form 66) to the Procurement Division, One Time Acquisition unit.

Your procurement will be processed correctly and expeditiously when the following areas of a Purchase Estimate (PE) (Std. Form 66) are complete and properly filled out. The agency billing code and PE number must yield a unique combination for each PE.

Please verify that all the information provided on the PE is accurate prior to submission to avoid delay or having the PE returned to you.

Purchase Estimate (Std. 66) Form		✓
Agency Billing Code	Only one billing code	
Purchase Estimate Number	Agency purchase estimate number	
Certification of Referenced Vendor	If SB or DVBE	
Supplier Reference or Information to Procurement Division Provide a minimum of two (2) suppliers able to provide item(s). If not at least 2, submit NCB justification form.	Name of one of the suppliers contacted for quote, spec development, etc. Provide at least one other on the PE or as an attachment. If PE is less than \$250 – verify supplier is a SB or DVBE	
Ship to address	Include Contact Name, Phone Number & Email	
Charge to address	Include Contact Name, Phone Number & Email	
Agency Contact Regarding this Estimate	Name, Phone Number & Email of agency contact	
Quantity	Quantity of each item being requested.	
Unit	Unit of measure (each, set, lot, etc.)	
Commodity Code Number	Verify the group, class, and subclass (UNSPSC)	
Description	Commodity description (including acceptable brands/models that will meet agency needs, for reference). Include additional information including special delivery instructions etc.	
Unit price	From vendor quote(s)	
Extension	Total price for qty. requested.	
Total Purchase Estimate Amount	If PE is less than \$250k, DGS policy requires that the SB/DVBE Option be used. If there is not at least 2 SB's or 2 DVBE's that can fulfill requirements, a waiver must be obtained. A waiver application must be submitted including all research documentation showing agency's due diligence to locate SB or DVBE. This documentation is to be submitted with the purchase estimate.	
Approvals and signatures	Proper agency approvals. Funds are available and identified to proper accounting codes. See SAM 3558 through 3558.2 for further details.	
Fiscal year.	Fiscal year of purchase.	
Do Funds Expire At The End of F.Y'	'Yes' or 'No'	

Attachments to Purchase Estimate		✓
Mission Critical Statement	Must be signed by Agency Secretary or Director or authorized designee and submitted with PE.	
Technical Requirements	Specification documents, requirements or literature.	
Drawing(s) or blue print(s),	Make sure these can be reproduced for suppliers.	
Proposed Administrative Requirements	Special warranty provisions, Inspection and acceptance requirements, Special delivery instructions, Alternate Protest Process (APP), Other applicable language or requirements to be included in bid documents.	
Quotes and Product Literature from referenced suppliers.	Minimum of 2.	
Non-Competitive Bid (NCB) Justification and supplier quote	See SAM 3554 & 3555 for further details.	
Limited Competitive Bid (LCB) Justification and supplier quote(s)		
Applicable Waivers/Approvals The approving department will forward the complete package with approvals to the Procurement Division.	Prison Industry Authority (PIA) Office of Technology Services (OTS) Fleet Administration (OFAM) Office of State Publishing (OSP) Real Estate Services Division	
Additional Information	Item can be purchased on CMAS? Statewide contract? Federal or ARRA Funded?	
SB/DVBE Documentation	Documentation of research supporting SB/DVBE waiver	