

Purchase Estimate (PE) Preparation Check List

The following check list has been prepared to assist you in the preparation and submittal of your PE to the Procurement Division.

Your procurement will be processed correctly and expeditiously when the following areas of a PE 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 valid billing code.
- Purchase Estimate Number
- Supplier Reference or Information to Procurement Division
- Certification of Referenced Vendor
- Ship To Address
(Include Contact Name, Phone Number & Email)
- Charge To Address
(Include Contact Name, Phone Number & Email)
- Quantity and Unit of Measure desired.
- Commodity Code. Verify the group, class, and subclass (UNSPSC).
- Commodity Description including brands/models for reference
- Unit price.
- Extension Total
- Additional Information (special delivery instructions, etc.)
- Total Estimate Amount (Click here if PE is less than \$250k)
- Approvals and Signatures, proper approvals from approving agencies have been obtained. Funds are available and identified to proper accounting codes See [SAM 3558](#) through [3558.2](#) for further details.
- Fiscal Year
- 'Yes' or 'No' block 'Do Funds Expire At the End of F.Y.', check appropriately

Send Attachments/Enclosures with the PE, for example:

- Specifications requirements and literature
- Drawing(s) or blue print(s), make sure these can be reproduced by suppliers
- Proposed Administrative Requirements (special warranty provisions, inspection and acceptance requirements, etc.)
- Quotes and/or product literature from referenced supplies
- Non Competitive Bid (NCB) Justification and supplier quote (if applicable)
- Limited Competitive Bid (LCB) Justification and supplier quote(s) (if applicable) See [SAM 3554](#) & [3555](#) for further details.

Additional Information:

- Item can be purchased on CMAS or other Statewide contract
- Documentation of research supporting SB/DVBE waiver

Applicable Waivers or Approvals:

- PIA
- Telecom
- Fleet Administration
- OSP

The approving department will forward the complete package with approvals to the Procurement Division. A duplicate copy if sent to the Procurement Division will be returned.

[Printable Check List](#)