

File Documentation Checklist

Information Technology Services: - Competitive (Up to \$500,000.00):

Order of Appearance:

1. Standard Agreement for IT Goods and Services Only (STD.213)* to include:

*Amendments to purchase document will be filed with most current amendment always on top.

- IT contract language models as applicable to the purchase. (Recommended \$5,000.00 and over, required \$100,000.00 and over)
- Attachment 1, Statement of Work (including equipment and delivery schedules).
 - Attachment 2, IT General Provisions (GSPD 401-IT).
 - Attachment 3, Information Technology Purchase Special Provisions.
 - Attachment 4, Information Technology Maintenance Special Provisions.
 - Attachment 5, Information Technology Software License Special Provisions.
 - Attachment 6, Information Technology Personal Services Special Provisions.

2. Documentation as applicable to the awarded purchase document:

- Agreement Summary (STD.215)
- Contract Award Report (STD.16) (Over \$5,000.00)
- Small business/micro-business and/or Disabled veteran business owned enterprise verification (DB certification)
- Payee Data Record (STD.204)

3. Procurement Summary* – Documenting evaluation and selection process:

- Procurement Summary document –Department's option to use this form to summarize the procurement activities leading up to the award (Optional)
- Bid Quote Worksheet (Recommend using DGS/PD sample or department may develop their own)
- Evaluation and Selection Report (Dependent upon the value or risk of procurement)
- *Evaluating the procurement effort either by bid quote worksheet or evaluation and selection report includes validations of socio-economic preference programs including small business calculations, documentation responsiveness and responsibility. If another supplier, other than the lowest responsible bidder meeting specifications is selected for award, documentation must be included in the file explaining why a lower bid was rejected, and how and why the selection was made.

4. Responses to Solicitation –

- Successful supplier response first, followed by unsuccessful supplier responses as listed on bid quote worksheet or evaluation and selection report.
- Each response should include administrative requirements – STD.204, SM/DVBE certification, completed DVBE participation attachment, TACPA, EZA, LAMBRA as applicable

5. Bid List & Solicitation package and any addenda:

- Bid List – vendor name, address, phone, fax and contact person. Indication if supplier is small business, micro-business and/or disabled veteran owned business status.
- Solicitation Document which can be: (Refer to SAM 5200 for sample solicitation)
 - Request for Quotation (RFQ)
 - Request for Proposal (RFP)
 - Invitation for Bid (IFB)
- Bidder instructions (GSPD-451) – up to \$500,000.00 thereafter, Section II – Rules Governing Competition
- Socio-Economic Preference Program attachments as applicable to the purchase to include:
 - DVBE Participation document (anytime department requires it)
 - TACPA/EZA/LAMBRA (recommended at \$85,000.00, required at \$100,000.00 and over)

6. Pre-Procurement Requirements and Approvals:

- Copy of CSCR advertisement on IT services valued over \$5,000.00. (Departments submit electronically or complete an Advertising in the Contracts Register form (STD.815))
- Request for Interest/or Information (if procurement activity warrants it.)
- Any approval documents and/or notation of existence of*:
 - Signed Certification of Compliance with SAM 4819.32 – purchases valued \$100,000.00 or more.
 - *For IT procurements valued at less than \$100,000.00, notation and/or documented support must be provided to include:
 - ✓ Approved Feasibility Study Report (either providing the FSR transmittal approval letter showing date approved, FSR title and FSR number or recording such information within the file with where the document is retained within the department.)
 - ✓ Exemption from certification requirements as procurement acquires, Maintenance Services, Consulting Services to develop an FSR, and other exceptions as referenced in SAM 4819.3 & 4819.4
 - ✓ Telecommunications

7. User Request and general documentation:

Sufficient documentation in accordance with a department's policy and procedures to request a procurement activity.