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## File Documentation

### Transactions valued \$5,000.00 or less (non-IT Goods, IT Goods and Services):

- Documenting Fair and Reasonable may include:
  - Obtaining competitive price quotes
  - Established catalog/market pricing
  - Prices set by law or regulation
  - Historical comparison

### Order of Appearance:

#### 1. Purchase Document:

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

- Purchasing Authority Purchase Order (STD.65)\*:
  - Non-IT goods or IT goods and services (when services is lesser to overall purchase)
    - ✓ General Provisions (GSPD 401-Commodities)
  - IT goods  
IT contract language models as applicable to the purchase:
    - ✓ 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.

- Contract Agreement for IT Goods and Services Only (STD.213)

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

- IT services (when goods is lesser to overall purchase)
  - ✓ 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:

- Small business/micro-business and/or Disabled veteran business owned enterprise verification (DB certification).
- Payee Data Record (STD.204)

#### 3. Pre-Procurement Requirements and Approvals:

- Non-IT Goods purchase transactions:  
Any approval documents required:
  - Vehicle Acquisition Request Form (Office of Fleet Administration)
  - Prison Industry Authority (PIA) Waiver Request (Prison Industry Authority)
  - PIA Request for Modular Systems Furniture (MSF) (Prison Industry Authority)
  - Surplus property
- IT Goods and Services LPA purchase transactions:
  - \*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.)
    - ✓ Workgroup Computing Justification Form (either retaining the WCJF within the procurement file or notation of the approval date of the WCJF, title and WCJF number or recording such information in the procurement file with a notation of where the document is retained within the department.)
    - ✓ Telecommunications

#### 4. User Request and general documentation:

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