

**INFORMATION TECHNOLOGY (IT) PURCHASE ESTIMATE (PE)
PREPARATION & SUBMISSION CHECKLIST**

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

Information Technology (IT) Purchase Estimate (PE) Preparation & Submission Checklist		✓
Purchase Estimate (Std. 66)*	Completed and signed.	
Mission Critical Approval w/signatures	Must be signed (wet signature) by Agency Secretary or Director or authorized designee and submitted with PE.	
Internal IT Approval	Desktop Mobile Computing Justification Form (DMC) or E-mail document showing internal IT approvals.	
Feasibility Study Report (FSR) with approval signatures and FSR #	If applicable - Documentation of scope, costs, benefits, schedules and methodologies of IT projects.	
GC 19130 Justification (personal services only)	http://www.documents.dgs.ca.gov/pd/delegations/pac041808.htm	
CSSI Exemption Form	http://www.documents.dgs.ca.gov/pd/poliproc/ITHardwarePCGoodsExemptionContractProcessedJustificaitonv2.2.doc	
Statement of Work* (SOW)	Written description of work to be performed.	
Proprietary Letter or Sole Source letter	If applicable - Current letter on company letterhead from manufacturer/supplier.	
Price Quote	Manufacturer or Supplier price quote.	
Prior Purchase Order	Copy of prior purchase order if request is for a renewal.	
Small Business Market Research	If \$5,000 - \$250,000 (if applicable).	
Limit to Brand form GSPD-08-001	If applicable.	
Non-Competitively Bid (NCB) Form (# GSPD-09-007)	If applicable.	
Property Survey Report Form (Std.152)	Trade in of state property if applicable.	
Cost Worksheet	For more than 10 line items if applicable.	
CA Technology Agency Pre-Approval (formerly OCIO).	IT Policy Letter (ITPL) #11-03, \$1,000,000. **No longer needed per CTA letter TL 11-3, dated 12-9-11	
ITPP	New projects > \$100,000 **No longer needed per CTA letter TL 12-1, dated 1-24-12.	

****Link to all TL letters:** http://www.cio.ca.gov/Government/IT_Policy/TL.html