

## 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 PE (Std. 66) requests to the Procurement Division (PD), One Time Acquisitions (OTA) unit.

		✓
Purchase Estimate (Std. 66)	Completed and signed	
Mission Critical Certification w/signatures	Must be signed (wet signature) by Agency Secretary or Director or authorized designee and submitted with PE. Refer to State Contracting Manual (SCM) Volume 3, Ch. 2, Topic 5, 2.B4.15	
Pre-Procurement Reviews and Approvals	Certain classes of purchases that may require review and approval before a department can proceed with a purchasing activity. Refer to SCM Vol. 3, Ch. 2, Section C	
Certification of Compliance with State IT Policies	IT Procurements valued at \$100,000 or more. Refer to SAM 4832 and SCM Volume 3 Section 2.C6.0 <a href="http://www.documents.dgs.ca.gov/sam/pdf/4832ILLus.pdf">http://www.documents.dgs.ca.gov/sam/pdf/4832ILLus.pdf</a>	
Internal IT Approval	Under the Desktop and Mobile Computing Policy Form (DMCP) Refer to SCM Vol. 3, Ch. 2, Topic 7	
Feasibility Study Report (FSR), ITPP included, with approval signatures and FSR number	For IT Projects - Submit FSR/ITPP, documentation of scope, costs, benefits, schedules and methodologies. For IT projects over \$1,000,000.00, departments must provide a copy of the approved FSR/ITPP section 5. Refer to: SCM Volume 3, Ch. 2 Topic 3 and Topic 4. Refer to CTA letters** TL 12-1 & TL 12-17 (if FSR review is applicable e-mail sections 1-5 to <a href="mailto:technologyprocurements@state.ca.gov">technologyprocurements@state.ca.gov</a> )	
FSR Internal or approved through DOF	Refer to SAM 4819.35	
Project Reportable	Refer to SAM 4819.37.	
Project Based on a FSR	Refer to SAM 4819.39 and California Department of Technology (CalTech) Cost Threshold <a href="http://www.cio.ca.gov/Contact_Us/staff_assignments.html">http://www.cio.ca.gov/Contact_Us/staff_assignments.html</a>	
GC 19130(b) Justification (STD 215 or equivalent) and proof of submittal to DPA (personal services only)	<a href="http://www.documents.dgs.ca.gov/pd/delegations/pac041808.htm">http://www.documents.dgs.ca.gov/pd/delegations/pac041808.htm</a> Refer to: SCM Volume 3 Section 2.B4.3 Contracted Services	
CSSI Exemption Form	<a href="http://www.documents.dgs.ca.gov/pd/pestatus/CSSI_Exemption_Form.pdf">http://www.documents.dgs.ca.gov/pd/pestatus/CSSI_Exemption_Form.pdf</a> Refer to SCM Vol. 3, Ch. 6, Topic 1, 6.D1.9	
Statement of Work (SOW)	Written description of work to be performed. Word format. Refer to SCM Volume 3 Section 2.B5.1	
Proprietary Letter or Sole Source letter	If applicable - Current letter on company letterhead from manufacturer/supplier, addressed to State Agency, dated and signed.	
Price Quote	Manufacturer or Supplier's price quote.	
Prior Purchase Order	Copy of prior PO if request is for a renewal of services or like items.	
Small Business (SB) or Disabled Veteran Business Enterprise (DVBE) Market Research	If \$5,000 - \$249,999.99 (if applicable). Refer to Government Code (GC) Section 14838.5 (a) and (b) Refer to SCM Vol. 3, Ch. 3, Topic 2	
Limit to Brand Statement (GSPD-08-001)	If applicable. For goods only. Refer to SCM Vol. 3, Ch. 4, Topic 3	

Non-Competitively Bid (NCB) Contract Justification ( GSPD-09-007)	If applicable. Include Market Analysis documentation, Supplier's List Pricing and Supplier's Quote. Refer to SCM Vol. 3, Ch. 5, Topic 5	
Property Survey Report Form (Std.152)	Trade in of state property if applicable. Refer to SCM Vol. 3, Ch. 10, Topic 7	
Cost Worksheet	For more than 10 line items if applicable.	
Telecommunication Goods and Services	Send all acquisitions for Telecommunication Goods and Services to the Department of Technology (CalTech) for processing per PCC 12120	

**\*\*Link to all TL letters: [http://www.cio.ca.gov/Government/IT\\_Policy/TL.html](http://www.cio.ca.gov/Government/IT_Policy/TL.html)**