

**File Documentation
For
Non-IT and IT Goods/Services
Limited to Brand or Trade Name Contracts (LTB)**

Purchase Document No: _____

Product Description: _____

Buyer: _____

Order of appearance:

Item	Post Award and/or Closeout Activities	Applicable	N/A	In File
7.	General Correspondence: <ul style="list-style-type: none"> • Letter of State's Acceptance of deliverables, if applicable. 			
8.	Payment History			
9.	Stock Received Report			
10.	Stock Returned Report			
11.	Supplier Performance Report <ul style="list-style-type: none"> • Delivery/Acceptance Documentation 			
12.	Contract Award Report (STD.16 – transactions over \$5,000.00)			

Item	Purchase Document	Applicable	N/A	In File
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| 7. | <input type="checkbox"/> Non-IT <ul style="list-style-type: none"> <input type="checkbox"/> Purchasing Authority Purchase Order (STD.65) • Amendments to executed purchase documents will be filed in sequential order with the most current amendment on top <u>Attachments:</u> <ul style="list-style-type: none"> • General Provisions (GSPD 401 non-IT Commodities) • Agency Special Provisions, as applicable.
<input type="checkbox"/> Information Technology (IT) <ul style="list-style-type: none"> <input type="checkbox"/> Standard Agreement for IT Goods and Services Only (STD.213) <input type="checkbox"/> Purchasing Authority Purchase Order (STD.65) • Amendments to executed purchase documents will be filed in sequential order with the most current amendment on top. | | | |
|----|--|--|--|--|
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- Attachments:
 - 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, IT Purchasing Special Provisions
 - Attachment 4, IT Maintenance Special Provisions
 - Attachment 5, IT Software License Special Provisions
 - Attachment 6, IT Personal Services Special Provisions

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Item	Purchase Document	Applicable	N/A	In File
8.	<input type="checkbox"/> Purchase Estimate (STD.66) <input type="checkbox"/> Non-IT <input type="checkbox"/> IT Submitted to DGS/PD on those transactions that are for LTB transactions requested by a departments that either do not have any purchasing authority or the purchase activity exceeds a department's LTB purchasing authority. The LTB contract justification form is submitted to DGS/PD along with the STD.66.			

Item	Supporting documentation to the awarded purchasing document	Applicable	N/A	In File
9.	Agreement Summary (STD.215), as applicable			
10.	Contract Award Report (STD.16) – Transactions over \$5,000.00			
11.	Payee Data Record (STD.204)			
12.	Sellers Permit, as applicable to the purchase of a tangible product.			
13.	Recycled-Contract certification, if applicable			
14.	SB/MB/DVBE database certification verification document			

Item	Solicitation Documentation	Applicable	N/A	In File
Note: Refer to PAM, Chapter 5, Topic 7 Infoblocks 5.7.0 – 5.7.3				

15. ☐ Non-IT solicitation document
- a) Request for Quote
- General Provision (GSPD-401 non-IT commodities)
 - Bidder Instructions (GSPD-451)

☐ IT Solicitation document:

- b) Request for Quote
- General Provision (GSPD-401IT)
 - Bidder Instructions (GSPD-451)
 - 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, IT Purchasing Special Provisions
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Item	Pre-Procurement Requirements and/or Approvals			
16.	<u>Advertisement</u> <ul style="list-style-type: none"> Contract Advertising Exemption Request form (STD.821) required for an NCB contract justification request for IT services 			
17.	<u>Limiting to Bidding Contract Justification Form.</u> Note: (Departments purchasing authority for LTB contract approval under \$25,000.00 must complete the LTB contract justification form and retain in the purchase document files.)			
Item	Pre-Procurement Requirements and/or Approvals	Applicable	N/A	In File
7.	<u>Pre-Approval Documentation</u> <ul style="list-style-type: none"> Desktop and Mobile Computing Justification notation or documentation, in accordance with the department's policies and procedures and PAM. IT transactions valued less than \$100,000.00, notation and/or acceptable documentation in accordance with department's policies and procedures and PAM IT transactions valued over \$100,000.00, a "Certification of Compliance with SAM 4819.32 by the director or designee Telecommunications approval, as applicable Vehicle Acquisition Request form Prison Industry Authority (PIA) Waiver Request PIA Request for Modular Systems Furniture Surplus Property, as applicable Finance Approval, as applicable, if purchasing used equipment CSSI/SC Exemption Request, as applicable DVBE Participation Waiver signed by Department Director or designee, as applicable. 			
Item	User Request and General Documentation:	Applicable	N/A	In File
8.	<u>Department Requisition</u> <ul style="list-style-type: none"> Provides customer details in terms of quantities, description, specifications, technical requirements, funding and signature approvals. 			