**File Documentation
For
Information Technology Services
Competitive Solicitations
Up to $500,000.00**

Purchase Document No: _____

Product Description: _____

Buyer: _____

Order of appearance:			
Item	**Post Award and/or Closeout Activities**	**Applicable**	**N/A**	**In File**
1.	General Correspondence: • Letter of State's Acceptance of deliverables, if applicable.			
2.	Payment History			
3.	Stock Received Report			
4.	Stock Returned Report			
5.	Supplier Performance Report • Delivery/Acceptance Documentation			
6.	Contract Award Report (STD.16 – transactions over $5,000.00)			
Item	**Purchase Document**	**Applicable**	**N/A**	**In File**
7.	Purchasing Authority Purchase Order Standard Agreement for IT Goods and Services Only (STD.213) • Amendments to executed purchase documents will be filed in sequential order with the most current amendment 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, IT Purchasing Special Provisions ▪ Attachment 4, IT Maintenance Special Provisions ▪ Attachment 5, IT Software License Special Provisions ▪ Attachment 6, IT Personal Services Special Provisions			
8.	Agreement Summary (STD.215)			
9.	Contract Award Report (STD.16) – Transactions over $5,000.00			
10.	Payee Data Record (STD.204)			
11.	Sellers Permit, as applicable to the purchase of a tangible product.			
12.	Recycled-Contract certification, if applicable			
13.	SB/MB/DVBE database certification verification document			

Item	Procurement Evaluation Summary Documentation	Applicable	N/A	In File
	Note: Evaluating and documenting the procurement effort either using the recommended Bid Quote Worksheet, Procurement Summary Report, (or similar documents developed by the department) or an Evaluation and Selection Report dependent upon the purchasing activity. Evaluating the procurement effort includes validations of the socio-economic preference programs including small business calculations, documenting responsiveness and responsibility. Each response should include any completed documentation as required by the solicitation's administrative requirements (i.e.: STD.204, SM/MB/DVBE certification, DVBE participation attachment, recycled content certification, etc.)			
14.	Procurement Summary Report - using the suggested form or by similar document to summarize the procurement activity leading up to the award.			
15.	Bid Quote Worksheet – using the recommended form or a similar document to document the results of			
16.	Evaluation and Selection Report, as applicable to the risk of the procurement.			
17.	Evaluation Methodology: ☐ Lowest net cost meeting all other bid specifications ☐ Value-effective (must provide for two envelop evaluation procedure)			
Item	**Solicitation Documentation**	**Applicable**	**N/A**	**In File**
18.	Solicitation Method: ☐ Oral solicitation ☐Request for Quotation			
19.	Supplier Responses • Successful supplier response first, • Followed by supplier response as listed on bid quote worksheet or evaluation and selection report. Each response should include any completed documentation as required by the solicitation.			
20.	Bid List • Supplier name • Address • Phone and fax numbers • Contact person • Indicate if supplier is SB/MB/DVBE certification			

Item	Solicitation Documentation (Continued)	Applicable	N/A	In File
21.	Solicitation document:			
	a) Request for Quote – (Written)			
	• Addenda, as applicable			
	• 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			
	• Attachment 4, IT Maintenance Special Provisions			
	• Attachment 5, IT Software License Special Provisions			
	• Attachment 6, IT Personal Services Special Provisions			
	• Administrative attachments, as applicable			
	▪ DVBE Participation documentation, as applicable			
	▪ TACPA/EZA/LAMBRA, recommended at $85,000.00, required at $100,000.00 and over.			
	b) Oral solicitation			
	• Addenda script, as applicable.			
	• Documented "script" or narrative of the solicitation requirements.			
Item	**Pre-Procurement Requirements and/or Approvals**			
22.	Advertisement			
	• Copy of the California State Contract Register Ad (CSCR) Solicitation must be advertised if valued at $4,999.99 and over.			
23.	Request for Interest or Information, Copy of RFI, if applicable.			
Item	**Pre-Procurement Requirements and/or Approvals**	Applicable	N/A	In File
24.	Pre-Approval Requirements			
	• Transaction is exempt by statute, as applicable. If purchase if made under this justification, the procurement file must include a statement identifying how the transactions is exempt.			
	• Transaction is exempt by DGS policy, as applicable. If purchase if made under this justification, the procurement file must include a statement identifying how the transactions is exempt			

Item	Pre-Procurement Requirements and/or Approvals (Continued)	Applicable	N/A	In File
	Pre-Approval Documentation (Continued):			
	• 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			
	• 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**
25.	Department Requisition			
	• Provides customer details in terms of quantities, description, specifications, technical requirements, funding and signature approvals.			