File Documentation
For
Non-IT Goods
Competitive Solicitations
$100.00 - $100,000.00

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, 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 (STD.65) • Amendments to executed purchase documents will be filed in sequential order with the most current amendment on top.			
8.	Contract Award Report (STD.16) – Transactions over $5,000.00			
9.	Payee Data Record (STD.204)			
10.	Sellers Permit, as applicable to the purchase of a tangible product.			
11.	Recycled-Content certification			
12.	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, a similar document developed by the department or an Evaluation and Selection Report. Each response should include any completed documentation as required by the solicitation's administrative requirements (i.e.: STD.204, SB/MB/DVBE certification, DVBE participation attachment, recycled content certification, etc.)			
13.	SB/MB/DVBE Documents for CUF • Bidder Declaration (GSPD05-105 or GSPD 05-106) • DVBE Declarations (STD.843)			
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. Most non-IT transactions at this dollar level will not require this document. The Bid Quote Worksheet or similar document will suffice.			

Item	Solicitation Documentation	Applicable	N/A	In File
17.	Solicitation Method: ☐ Oral solicitation ☐Request for Quotation			
18.	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.			
19.	Bid List • Supplier name • Address • Phone and fax numbers • Contact person • Indicate if supplier is SB/MB/DVBE certification			

20.	Solicitation document:
	a) Request for Quote – (Written)
	   • Addenda, as applicable
	   • General Provision (GSPD-401 Non-IT Commodities)
	   • Bidder Instructions (GSPD-451)
	   • Administrative attachments as applicable
	b) Oral solicitation
	   • Addenda script, as applicable.
	   • Documented "script" or narrative of the solicitation requirements.
		░░░	░░░	░░░

Item	Pre-Procurement Requirements and/or Approvals	Applicable	N/A	In File
21.	Advertisement • Copy of the California State Contract Register Ad (CSCR) if advertisement was warranted at this dollar threshold.			
22.	• Request for Interest or Information, Copy of RFI, if applicable.			
23.	Pre-Approval Documentation: • Vehicle Acquisition Request form	░░░	░░░	░░░
	• Prison Industry Authority (CALPIA) Waiver Request			
	• PIA Request for Modular Systems Furniture			
	• Surplus Property			
	• CSSI/SC Exemption Request, if applicable			
	• DVBE Waiver signed by Department Director or designee.			
Item	User Request and General Documentation:	Applicable	N/A	In File
24.	Department Requisition • Provides customer details in terms of quantities, description, specifications, funding and signature approvals.			