

Purchasing Checklist



Required for all amounts > \$10,000

| | | |
|---|-----------|------------|
| Date | Requestor | Department |
| Vendor or contractor selected | | |
| Total cost of purchase/project/contract \$ | GL# | |

| | | |
|---|------------------------------|-----------------------------|
| Goods or services are allowable and necessary | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
| Required price comparisons received (per below) | <input type="checkbox"/> | <input type="checkbox"/> |

| Amount | Required Solicitation |
|----------------------------|---------------------------------------|
| > \$10,000 but ≤ \$25,000 | 2 price checks documented |
| > \$25,000 but ≤ \$50,000 | 3 price checks documented |
| > \$50,000 but ≤ \$250,000 | RFP (request for proposal) for 3 bids |
| > \$250,000 purchase | Sealed bids required – use RFP |
| > \$250,000 service | Competitive proposal – use RFP |

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| Vendor or contractor is suspended or debarred? (print SAM verification with timestamp, required for \$25,000 and up) | YES <input type="checkbox"/> | NO <input type="checkbox"/> |
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| If the vendor or contractor is not yet registered on SAM.GOV, the Debarment Certification form must be completed by the vendor or contractor. Has the Debarment Certification form been attached? | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

| | | |
|--|--------------------------|--------------------------|
| Has all required documentation been attached? (Contract, Quotes, etc.) | <input type="checkbox"/> | <input type="checkbox"/> |
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| Is this an amendment to a contract or agreement? | <input type="checkbox"/> | <input type="checkbox"/> |
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| If “yes”, is the contract or agreement attached? | <input type="checkbox"/> | <input type="checkbox"/> |
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| Has the required NAOB vendor check been completed? (TERO 9.05.110) | <input type="checkbox"/> | <input type="checkbox"/> |
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| Has contracting with a small and minority business, women’s business, enterprise, veteran-owned and labor surplus area firms been considered? (2CFR 200.321) | <input type="checkbox"/> | <input type="checkbox"/> |
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| Is this a new vendor or contractor? | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

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| If yes, is their W-9 attached? (required by Finance Department) | <input type="checkbox"/> | <input type="checkbox"/> |
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| Is this a preferred vendor? (documentation required) | <input type="checkbox"/> | <input type="checkbox"/> |
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| Is this a state, federal, or Sourcewell contract? If “yes”, list contract # _____ | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

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| Is “Sole Sourcing” necessary? (If “yes”, complete and attach Sole Source Checklist on the next page) | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

Comments

APPROVALS

| | | | |
|------|------------------------------|--------------|-----------|
| Date | Executive/Director Signature | Printed name | Job title |
|------|------------------------------|--------------|-----------|

Forward to the Procurement Department for review and approval YES NO

| | | | |
|------|---|--------------|-----------|
| Date | Procurement/Contract Compliance Signature | Printed name | Job title |
|------|---|--------------|-----------|

| | | | |
|------|---|--------------|-----------|
| Date | Procurement Compliance Director Signature | Printed name | Job title |
|------|---|--------------|-----------|

Purchasing Checklist (continued)

SOLE SOURCE CHECKLIST (ONLY IF NECESSARY)

NOTE: If it is not possible to obtain more than one price check or bid as required by tribal policy or by federal purchasing requirements, then sole sourcing may be acceptable by only if one of the following conditions exist. If you are relying on sole sourcing to support your purchase or service, which of the below situations is the case?

1 of the 4 options below MUST BE CHECKED to rely on sole sourcing:

- | | YES | NO |
|--|--------------------------|--------------------------|
| The purchase is available only from a single source (documentation/justification required) | <input type="checkbox"/> | <input type="checkbox"/> |
| The public exigency or emergency for the requirement will not permit a delay resulting from complete solicitations | <input type="checkbox"/> | <input type="checkbox"/> |
| The federal awarding agency expressly authorizes noncompetitive proposals in response to a written request | <input type="checkbox"/> | <input type="checkbox"/> |
| Or after solicitation from a number of sources, competition is determined inadequate | <input type="checkbox"/> | <input type="checkbox"/> |

Sole Source Justification (REQUIRED)

Additional Information