

PURCHASE OF PRODUCT CHECKLIST - REQUIRED ITEMS

Use of this checklist will also ensure audit compliance

This checklist must be included in the REQUISITION module along with all the required documents listed below when a product is purchased (Not Services). Each document must be attached separately in MUNIS.

<input type="checkbox"/>	COMPANY OR CONTRACTOR NAME: _____ VENDOR #: _____
<input type="checkbox"/>	EVIDENCE OF COMPETITIVE BIDDING OR SOLE SOURCE OR EMERGENCY JUSTIFICATION OR PIGGYBACK/COOPERATIVE AGREEMENT <input type="checkbox"/> Less than \$3,000 – One written quote <input type="checkbox"/> Between \$3,000 to \$4,999 – Two written quotes – Attach Quote Summary Form <input type="checkbox"/> Between \$5,000 to \$50,000 – Three written quotes – Attach Quote Summary Form <input type="checkbox"/> Over \$50,000 – Competitive Sealed Bids or Proposals <input type="checkbox"/> Include BidsOnline Project Report <input type="checkbox"/> Include Rating Matrix or Canvass of Bids <input type="checkbox"/> Include Bid Solicitation or Request for Proposal or Request for Qualifications <input type="checkbox"/> APPROVED SOLE SOURCE FORM <input type="checkbox"/> APPROVED EMERGENCY JUSTIFICATION FORM <input type="checkbox"/> ≤ \$10,000 Signed by Depart. Head, Finance Director, City Manager: Date Signed by CM _____ <input type="checkbox"/> > \$10,000 Signed by Depart. Head & Finance Director: Date Signed by Finance Director _____ <input type="checkbox"/> PIGGYBACK/COOPERATIVE AGREEMENT <input type="checkbox"/> Copy of Solicitation <input type="checkbox"/> Approved Piggyback Justification signed by Finance Director
<input type="checkbox"/>	COUNCIL APPROVAL - If over \$10,000 – Attach the following Documents <input type="checkbox"/> Minutes (or email from City Clerk’s office) <input type="checkbox"/> Staff Report <input type="checkbox"/> Resolution (if applicable)
<input type="checkbox"/>	INFORMATION TECHNOLOGY ITEMS If the item being purchased is an information technology item, include the Approved IT Authorization Form signed by the IT Director
<input type="checkbox"/>	AMOUNT APPROVED BY COUNCIL – \$ _____ QUOTE/BID AMOUNT- \$ _____ Note: This amount must match the council approved amount, and amount entered in MUNIS

Requisitioner’s Name: _____

Department: _____