

### PD Approval Check List

DATE: \_\_\_\_\_ PD NUMBER: \_\_\_\_\_ BUYER INITIALS: \_\_\_\_\_ AMOUNT: \$ \_\_\_\_\_  
 DEPT: \_\_\_\_\_ VENDOR NAME: \_\_\_\_\_  
 COMMODITY/SERVICE: \_\_\_\_\_

**PD DOCUMENT - New**

**When rejecting a PD, type the reason(s) in the "Document Comment" section.**

- Shipping Location and Billing Location addresses are included
  - Short description in the "Document Description" box on the General Information tab of the header
  - Commodity Line has an extended description for the purchase
    - Minimum required information:
      - Description of material/service
      - Reference to bid/contract number or quote date
      - Expected delivery date/timeframe or dates of service
      - Reference to City Commission approval, if applicable (bid or sole/specified source that required approval due to amount of purchase)
- Note: Compare dates for contracts, city commission approval, etc. to ensure validity.
- If construction, retainage is included (verify it is stated in the contract and stated correctly on the PD document)

**ATTACHMENTS - Informal Quote**

- Quotes
- List of Vendors Solicited, including *Small and Service-Disabled Veteran Business* list
- Quotes Compliance
- Tabulation Record (quotes received, include no bids received)

**ATTACHMENTS - Formal Bid**

- Quote or Task Order (if continuing contract)
- Contract

**ATTACHMENTS - Method of Source Selection: Other Agency (Piggyback)**

- Method of Source Selection (signed)
- Bid Document
- Bid Record
- Awarded Bid
- Contract

**ATTACHMENTS - Method of Source Selection, other than Other Agency (Piggyback)**

- Method of Source Selection (signed)
- Price Quote

Note: If purchase was an "EMERGENCY", then the following form and backup is also required.

- Emergency Purchase Request (signed by Procurement and City Manager or designee)

**PD DOCUMENT - Modification**

**When rejecting a PD, type the reason(s) in the "Document Comment" section.**

- Amendment, Extension, Change Order, etc. (appropriate documentation authorizing change, including what the change is)
  - Email - an email can be acceptable in certain limited, situations, i.e. an account number change
- Short description of the modification in the "Document Description" box on the General Information tab of the header
- Commodity Line has an extended description, including the specifics of the modification
- Check Accounting Lines to ensure that a closed line was not increased/decreased (NOTE: If this occurs and is processed, it will cause problems)

NOTES: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

## PD Approval Check List

How to Insert a Document Comment for PD rejection:

- 1) Once the PO is opened, click the down arrow next to the PO's Phase and choose "Document Comments"

- 2) Choose "Reject" from the drop-down menu for *Phase*; "Purchasing Compliance" for *Subject*, enter the reason(s) for rejection, click **Save**, then click **Back** on the right hand top side of the screen

DRAFT

## QUOTES COMPLIANCE

*Form is required for all purchases with a value between \$5,000.01 to \$50,000.00*  
Do not use this form for a purchase that will be made using the Method of Source Selection form.

Date: \_\_\_\_\_

Re: Quotes Compliance with Procurement Policy

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### **Procurement Policy, Section 6.1(b): Method of Source Selection**

"Purchases with a value between \$5,000.01 and \$50,000 are required to have three (3) written quotes, including one from a small or service-disabled veteran business, when feasible."

Check this box *only* if your purchase is in full compliance with the preceding requirement and supporting documentation is provided

If your purchase is *not* in full compliance, check the applicable box and provide an explanation:

Obtained three quotes but one was not from a small or service-disabled veteran business

Obtained two quotes but one was not from a small or service-disabled veteran business

Using federal funds which supersede City's requirement(s)

Other (explain): \_\_\_\_\_

Explanation: \_\_\_\_\_

Project Manager Name: \_\_\_\_\_

Project Manager: \_\_\_\_\_

Signature

/ \_\_\_\_\_  
Date