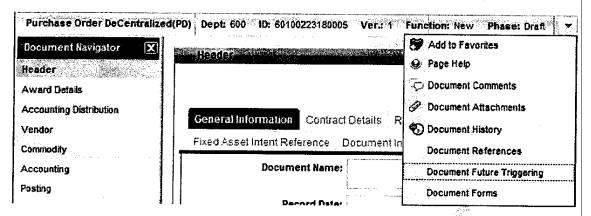
PD Approval Check List DATE: ______ PD NUMBER: BUYER INITIALS: AMOUNT: \$ DEPT: VENDOR NAME: COMMODITY/SERVICE: PD DOCUMENT - New When rejecting a PD, type the reason(s) in the "Document Comment" section. Shipping Location and Billing Location addresses are included Short description in the "Document 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 Ouotes 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 П Awarded Bid Contract ATTACHMENTS - Method of Source Selection, other than Other Agency (Piggyback) П Method of Source Selection (signed) ☐ Price Ouote 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: _

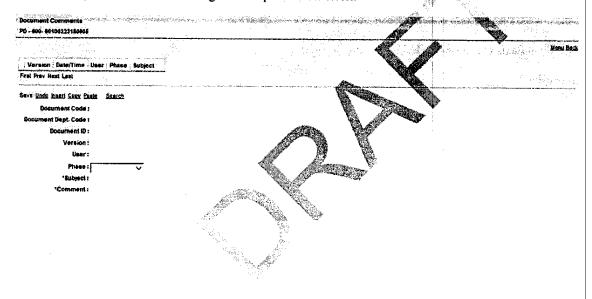
PD Approval Check List

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



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:	Colombia de
Re:	Quotes Compliance with Procurement Policy
"Purc	urement Policy, Section 6.1(b): Method of Source Selection chases with a value between \$5,000.01 and \$50,000 are required to have three (3) written quotes, including the service-disabled veteran business, when feasible."
	Check this box <u>only</u> if your purchase is in full compliance with the preceding requirement an supporting documentation is provided
If you	r purchase is <u>not</u> 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):
Expla	nation:
Projec	et Manager Name:
Projec	ct Manager: / Date