

ALL PURCHASES

- CHECKED PROJECT TERM DATE. If purchase order terms extend beyond the term date or the project ends in less than thirty (30) days, obtain documentation from PA that purchase is allowable.
- ARRA Funds (verify FAMIS screen 68, Indicated by first part of project title) If so added text code which applies (1AR)
- CURRENT VENDOR LETTER ON FILE.
- If applicable, checked TPASS, state contract, scheduled purchase, or availability of product through group purchases.
- State vendor hold status – check State vendor debarred website: (Print for file)
www.window.state.tx.us/procurement/prog/vendor_performance/debarred/debarred_vendors_print.html
- Federal excluded parties checked - <https://www.sam.gov> (Print for file)
- Check Visual Compliance to verify the vendor isn't restricted from trade
- Check Visual Compliance to verify that the item you are purchasing is not export controlled **or deemed export clauses**.
 - Controlled or deem export applies – Notify PI using standard email and copy **System Member's compliance officer**. Officers listed at <http://www.tamus.edu/offices/researchcompliance/rco/> (Print email for file)
 - Items not export controlled
- Vendor's terms and conditions, reviewed for concerns and any issues resolved.
- Requisition forwarded to appropriate HUB Director for review: (Estimated over \$100,000)
- HUB vendor's active status on screen 203 or CMBL, www.window.state.tx.us/procurement/cmb/cmbhub.html
- HUB subcontracting packet or waiver included for orders over \$100,000.
- PO/HUB tracking report updated
- Non-Compliant monthly report updated, if applicable
- CONTRACT included: Details discussed with Teresa
- ENVIRONMENTAL HEALTH & SAFETY:** Laser or other equipment that might be radioactive or have environmental safety concerns: Remind PI to file appropriate paperwork with environmental health and safety and copy appropriate EHS officer with a copy of the purchase order attached. (Print email for file)
- NAICS code** was placed on purchase order.

NON-COMPETITIVE PROCUREMENTS

- Sole Source (Obtained signed formal IFB from vendor)
- TIBH
- Master order # from Member institution (We may use master orders for all TAMU members)
- E & I Contract# _____
- DIR Contract# _____
- GSA Contract # _____ (federal dollars only and only if vendor extends discount)
- TXMAS Agreement # _____
- Buyboard Contract # _____
- Non-Compliant Order – Non compliant justification received

____ Other _____

STATE FUNDS

- Check PCC code – DOC Type 9 – LDT 65 – HIED (higher education) (unless state contract)
- Evaluate House Bill 620 – Preference if applicable, tie bids only

FEDERAL FUNDS

- ARRA clause included on purchase order where applicable
- Checked for any special federal flow down clauses.

USED EQUIPMENT AND/OR TRADE INS

- Used equipment purchase must have justification and valuation attached
- Trade In requires prior approval from department Property personal

SOLE SOURCE JUSTIFICATION

- FAMIS sole source screen 223 and Sole Source justification form completed.
- Signed by individuals authorized as per delegation of authority
- Cost/Price reasonableness form completed.

BUY AMERICAN ACT

- Determination was made that the product(s) being procured on the purchase order noted below are "commercially available off-the-shelf (COTS)" product(s) as defined by the Federal Acquisition Regulation (FAR) Part 2.

INSURANCE AND BONDING

- Insurance required? Yes No (Proof of liability insurance or workman's comp)
- Bonding Required? Yes No (Bid or Performance examples)

NOTES: _____

PO# _____ **DATE:** _____ **Initials** _____

<p>FILE Order</p> <ol style="list-style-type: none"> 1. Purchase order 2. Order requisition 3. T&C's 4. Routing documentation where applicable 5. Project Administrator approval when not on order requisition or routing 6. Project Information printout (TEES and PV) 7. Misc. Correspondence 8. Bids Received 9. Sole Source, if applicable 	<ol style="list-style-type: none"> 10. CMBL bidders printout 11. Bid summary and/or Cost/Price analysis for sole source 12. PI approval of successful bidder 13. Texas Debarred 12. Federal Excluded parties, SAM.gov 13. Completed Audit Checklist
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