

PO # _____

Initials _____

Date _____

ORDER AUDIT SHEET

NON-COMPETITIVE PROCUREMENTS

- Sole Source
- TIBH
- AgriLife Master Order No. _____
- E & I Contract No. _____
- DIR Contract No. _____
- TXMAS Agreement No. _____
- TAMU Agreement No. _____
- Buyboard Contract No. _____
- Non-Compliant Order – Non-Compliant Order Explanation (AG-628) form completed
- Other _____

ALL PURCHASES

- HUB vendors have active status on TPASS lists
- Nature of item requested is within mission
- Checked TPASS state contract, scheduled purchase, or available through group purchases
- Tax Status: Vendor hold checked – check for State vendor hold and debarred website
- Federal Suspension/Exclusion Status (EO13224 Compliance): Vendor has no active exclusions (<https://www.sam.gov/>)
- Check PCC code – State funds only – Doc Type 9 – LDT 65 – HIED (unless State Contract)
- Evaluate HB620 – Preference if applicable; Tie bids only; Not applicable for federal funds
- HUB subcontracting packet or waiver included for all orders over \$100,000.00
- Reviewed by Environmental Safety / Biosafety / Engineering / Facilities, if applicable.
- Capital equipment allowed on this account; Contact Contracts & Grants: 4XXXXXX & 5XXXXXX accounts
- ARRA Funds (verify account using FAMIS screen 029) Yes _____ No _____
- Commodity code included for each line item in FAMIS

FEDERAL FUNDS

- Indicate type of funds as federal in FAMIS on screen 410 and/or 220
- Include any additional federal clauses for all bids based on commodity or service
- Include ARRA clause (text code 051), if applicable
- Attached federal terms and conditions page to purchase orders not routed through the bidding process
- Federal Representations & Certifications (<https://www.sam.gov/>) or checklist completed and on file in Laserfiche
- Reasonable Price/Cost Analysis form completed
- Checked to see if lease option is available, if applicable
- Project administration approval obtained for non-competitive procurements

SOLE SOURCE JUSTIFICATION

- FAMIS screen completed and/or Sole Source Justification (AG-601 or AG-602) form completed
- Signed by Director of Purchasing

SERVICES

- Period of services is in specifications of Invitation for Bid and order
- Method of payment in specifications
- If renewable, indicate what time period, i.e.: 1 of 2, 2 of 2, - not to exceed 5 years
- If renewable, signed agreement attached
- Approved Independent Contractor (AG-106) form attached, if applicable

INSURANCE AND BONDING

- Insurance required? Yes _____ No _____ Paperwork received? Yes _____ No _____
- Bonding required? Yes _____ No _____ Paperwork received? Yes _____ No _____

INFORMALLY BID PURCHASES

- Bid tabulation included
- Shows all vendors solicited on bid tabulation
- Solicited from at least 6 vendors with a minimum of 4 HUBs (at least 1 minority and 1 female owned) or reason why not
- Solicited from vendors who can reasonably be expected to sell product
- Low bid accepted, or explanation why not
- The term F.O.B. Destination is included - freight included or added
- Page of purchase order terms and conditions is included with vendor copy

FORMALLY BID PURCHASES

Invitation for Bid:

- Bid period is 10 business days and 14 calendar days
- Bid is signed by vendor
- Specifications are not restrictive
- Extensions and totals are correct

Bid Tabulation:

- Bid tabulation is included
- Solicited from at least 6 vendors with a minimum of 4 HUBs (at least 1 minority and 1 female owned) or reason why not
- Solicited from vendors who can reasonably be expected to sell product
- All solicited vendors appear on bid tabulation
- HUB status appears on bid tabulation
- Low bid accepted, or explanation why not

Texas Marketplace:

- Posted bid and award to the Texas Marketplace

EMERGENCY PURCHASES

- Emergency Justification (AG-603) form completed
- Form signed by Director of Purchasing
- If possible, are there 3 informal bids, including HUBs? Yes _____ No _____ If no, why not?

USED EQUIPMENT AND TRADE INS

- Trade-in a separate item on bid and order
- Trade-in statement on Invitation for Bid and order
- Trade-in asset number listed in description of item
- Used or demonstrator specified in Invitation for Bid and order
- Used equipment justification and valuations attached

BULK FUEL MASTER ORDERS

- Terminal price sheet or OPIS rack price is included
- Terminal price sheet or OPIS rack price date fall in between the dates on the Invitation for Bid
- Constant markup shown and includes tax on undyed diesel and unleaded gases
- Price on bid agrees with terminal price sheet or OPIS rack price
- Beginning and ending dates on Purchase Order
- If renewal, signed agreement attached
- Attachments must agree with period of contract, i.e.: 1 or 2 years and renewal periods

NOTES / ADDITIONAL COMMENTS
