CONTRACT/OTA ORGANIZATION FILE CHECKLIST		Contractor
Contracting Officer		Contract Number:

Tab	Item	Y	N	N/A
	Pre-Award Planning			
1	Procurement Team Members/ Organizations	○	○	○
2	Coordination with Small Business Utilization Staff (AMS 3.6.1 & T3.6.1)	○	○	○
	a. Set-aside: 8(a), Small Business, SDVOB	○	○	○
3	Procurement Planning (T3.2.1)	○	○	○
	a. Prism Requisition Request	○	○	○
	b. Procurement Planning Documentation (market analysis/survey/etc.) (AMS 3.2.1.2.2 & T.2.1.2)	○	○	○
	c. Single Source/Emergency Justification (AMS 3.2.2.4)	○	○	○
	d. Rationale for brand name products & salient characteristics (T3.2.2.8)	○	○	○
	e. Rationale for bid samples	○	○	○
	f. Statement of Work, Specifications, TIEO's/Drawings/PWS	○	○	○
	g. T&M/LH: PWS/SOW including labor categories, education/experience requirements, etc.	○	○	○
	h. Recommendation for use of warranty (T3.10.4)	○	○	○
	i. First article testing and approval (AMS 3.10.8)	○	○	○
	j. Recommendation for use of options (T3.2.4)	○	○	○
	k. Preservation and packaging requirements (T3.2.2.8)	○	○	○
	l. Justification for Liquidated Damages (T3.8.7)	○	○	○
	m. Independent Gov. Cost Estimate (T3.2.1)	○	○	○
	n. ISO 9000 Certification Review	○	○	○
	o. Evaluation Plan/Scoring Criteria (T3.2.2)	○	○	○
	p. Government Furnished Property (AMS 3.10.3 & T3.10.3)	○	○	○
	q. Info. Supporting Construction of Agency-Owned Improvement form	○	○	○
	r. CFO review if more than $10M (including all options) (T3.2.1.4)	○	○	○
	s. CIO Review if more than $250,000 and is for information resources (Including all options) (T3.2.1)	○	○	○
	t. Consideration of Agency Wide Contracts (3.2.1.2.3)	○	○	○
	u. Milestone Schedule entered into PRISM	○	○	○
4	Single Source (AMS 3.2.1.3.7 & 3.2.2.4)	○	○	○
	a. Procurement Team Determination	○	○	○
	b. Management Review	○	○	○
	c. Legal Review (T1.15)	○	○	○
5	Coordination with Quality Assurance Div. (AMS 3.2.1.3. 4, T3.2.7 & T3.10.4)	○	○	○

Tab	Item	Y	N	N/A
6	SIR Review	○	○	○
	a. Legal review of SIR (T1.15)	○	○	○
	b. Requiring organization review	○	○	○
	c. Review of SIR by Security (AMS 3.14 and T3.14.1)	○	○	○
7	Security	○	○	○
	a. Classified Security Requirements	○	○	○
	b. Information, Personnel, and Physical Security as it related to suitability requirements and coordination	○	○	○
	c. Contractor Position Risk Sensitivity Designation Level Record (FAA Form 1600.77)	○	○	○
8	Unsolicited Proposal and Documentation (AMS 3.2.2.6 & T3.2.2.6)	○	○	○
9	Wage Determinations (T3.6.2)	○	○	○
10	Market Survey/Analysis (AMS 3.2.1)	○	○	○
11	Signed Non-disclosure Agreement /Conflict of Interest Certification (AMS 3.1.5/ 3.1.6 &T3.1.5/ 3.1.6)	○	○	○
12	Organizational Conflict of Interest Statements (AMS 3.1.7 & T3.1.7)	○	○	○
13	Procurement Integrity Act (team briefing) (AMS 3.1.8 & T3.1.8)	○	○	○
14	Determination to use Commercial Items (AMS 3.2.2.5)	○	○	○
15	Undefinitized Letter Contracts Doc. (T3.2.4)	○	○	○
16	Screening Information Request (SIR) (AMS 3.2.2.3.1.2.1)	○	○	○
17	Public Announcement (over $100,000) (AMS 3.2.1.3.1.1 & T3.2.2)	○	○	○
18	Requests for SIR from Announcement	○	○	○
19	SIR Mailing List	○	○	○
20	SIR Distribution Sheet	○	○	○
21	SIR Amendment(s)	○	○	○
22	SIR Responses/Abstract	○	○	○
23	Communications with Offerors (AMS 3.2.2.3.1.2.2)	○	○	○
24	Preproposal Conference	○	○	○
25	Late Offers	○	○	○
26	Mistakes in Offer	○	○	○
27	No Offer Correspondence	○	○	○
28	Original of Unsuccessful Offers	○	○	○
29	Letters to Unsuccessful Offerors	○	○	○
30	Verification of Offers	○	○	○
31	Procurement Team Evaluation Reports and Plans (AMS 3.2.2.3.1.2.3)	○	○	○
	a. Evaluation documentation	○	○	○
	b. Evaluation Team Members	○	○	○
	c. Evaluation Written Report	○	○	○
	d. T&M/LH: Evaluation of Employee Resumes	○	○	○
32	Extension of Acceptance Period	○	○	○

Tab	Item	Y	N	N/A
33	Successful Offeror's Reps/Certs (Sec. K)	○	○	○
34	Business Declaration Form (T3.6.1)	○	○	○
35	Successful Offeror's Cost/Price Proposal	○	○	○
36	Successful Offeror's Technical Proposal	○	○	○
37	Contracting Officer's Responsibility Determination (to include checking System for Award Management (SAM)(AMS 3.2.2.2 & T3.2.2.7)	○	○	○
38	EEO Compliance/OFCCP Clearance (Over $10M) (AMS 3.6.2.1 & T3.6.2)	○	○	○
39	Pre-Award Survey Information (T3.2.2.7)	○	○	○
40	DCAA Field Reports, DCAA Audit arrangements for Cost Type Contracts >$100M, and consideration for <$100M (Includes T&M, Cost Type) (AMS 3.2.3.2 & T3.2.3)	○	○	○
41	Certificate of Current Cost or Pricing Data (AMS 3.2.3.3.1.1 & T3.2.3)	○	○	○
42	Subcontracting Plan with coordination/ review by the SB Utilization Office (AMS 3.10.2 & T3.10.2)	○	○	○
43	Cancellation of RFO (T3.2.2)	○	○	○
44	Award Decision Document/Negotiation Memorandum (AMS 3.2.2.3.1.2.5)	○	○	○
	a. Price Analyst Report/Concurrence	○	○	○
	b. Management Review	○	○	○
	c. Legal Concurrence (T1.15)	○	○	○
	d. CFO Review (Over $10M) (T3.2.1.4)	○	○	○
45	Congressional/Public Affairs Notification (Over $3.5M) (AMS 3.13.5 & T3.13.1)	○	○	○
	Award Data and Contract			
46	Protest Documentation (AMS 3.9)	○	○	○
47	Lessons Learned Findings (AMS 3.2.2.3.1.5)	○	○	○
48	Contract Documents/Prism Award	○	○	○
49	Award Letter	○	○	○
50	FPDS (T3.13.1)	○	○	○
51	Contract Distribution Sheet	○	○	○
52	Contract award notification (T3.13.1)	○	○	○
53	Contractor Debriefing(s) (AMS 3.2.2.3.1.4)	○	○	○
54	Notice to Proceed (NTP)	○	○	○
55	Post Award/Preconstruction Conference (T3.8.7)	○	○	○
56	Subcontractor Statement & Acknowledgement (SF-1413)	○	○	○
57	Bonding (AMS 3.4.1 & T3.4.1)	○	○	○
58	Insurance (AMS 3.4.1 & T3.4.1)	○	○	○
	Post Award Documentation			
59	Letters of Delegation of Contracting Officer Representative (COR)	○	○	○
	a. Letters of COR Delegation Sent	○	○	○
	b. Signed Letters of COR Delegation by COR Received	○	○	○
	c. Letter of Nomination of COR	○	○	○
	d. Training/Certification of COR Complete	○	○	○
	e. Notification of COR Appointment to Acquisition Career Manager	○	○	○
	f. Notification of COR Revocation Letter to Acquisition Career Manager (T3.10.1)	○	○	○
60	CPARS Evaluation (T3.10.1A16)	○	○	○
61	Submittals/Certifications	○	○	○

Tab	Item	Y	N	N/A
62	Tax Exemption	○	○	○
63	Payrolls and Labor Correspondence	○	○	○
64	General Correspondence	○	○	○
65	Government Property (AMS 3.10.3 & T3.10.3)	○	○	○
	a. List of property	○	○	○
	b. Review/approval of contractor's property control system	○	○	○
	c. Contractually required reports	○	○	○
	d. Periodic inventories	○	○	○
66	Record of Payment (AMS 3.3.1.2 & T3.3.1)	○	○	○
	a. Invoices	○	○	○
	b. Progress Payment documentation	○	○	○
	c. Periodical Estimate	○	○	○
	d. Payment approvals/certifications	○	○	○
	e. Delphi Report (final payment verification)	○	○	○
67	Security reports and coordination with security staff (AMS 3.14 & T3.14.1)	○	○	○
68	Freedom of Information Act (FOIA) Requests (AMS 3.7 & T3.7)	○	○	○
69	Subcontracting plan- Quarterly and Semi-Annual Reports (T3.6.1)	○	○	○
70	Investigations, Violations, and Legal Items	○	○	○
	a. Complaints	○	○	○
	b. Patent and Copyright determination	○	○	○
	c. Anti-Trust Violation	○	○	○
	d. Labor Investigations/Interviews (T3.6.2)	○	○	○
71	Acceptance Reports consisting of Materiel Requisitions/Issue/Receipt and Inspection Report of Material and/or Services	○	○	○
72	Weekly Progress Reports/Daily Logs (T3.8.7)	○	○	○
73	CAI/JAI Inspections	○	○	○
74	Receiving Reports	○	○	○
75	Price Re-determination Data	○	○	○
76	Application for Contractual Adjustment	○	○	○
77	Final Release	○	○	○
	a. Statement of Liquidated Damages (T3.8.7)	○	○	○
	b. Final Delivery (T3.10.1)	○	○	○
	c. Contractor Release (T3.10.1)	○	○	○
78	Claims and Disputes	○	○	○
	a. Cases	○	○	○
	b. Termination (T3.10.6)	○	○	○
	c. Findings and Decisions of CO	○	○	○
	d. Appeals from decisions	○	○	○
	Contract Closeout			
79	Contractor Evaluation	○	○	○
80	Past Performance (T3.2.2)	○	○	○
81	Closeout (AMS 3.10.10 & T3.10.1)	○	○	○
	a. Contract File Completion Statement	○	○	○
	b. Closeout of Completed Contracts	○	○	○
	c. Contract Closeout Checklist	○	○	○
	d. Property Clearance/Distribution	○	○	○
	Modifications			
82	Modifications (T3.10.1)	○	○	○