

Purchase Order/GSA/FSS Order File Checklist

Base Contract Number:

Award Date:

Base Period of Performance:

Contractor Name:

Contractor Point of Contact:

Contracting Officer:

Contracting Officer Representative:

Procurement Planning					
TAB	Plan Procurement	AMS Reference	Y	N	N/A
1	Procurement Request Package	3.2.1 & T3.2.1			
	Procurement System Generated Requisition	T3.2.1			
	Market Analysis	AMS 3.2.1.2 & T3.2.1.2			
	Document: Draft Single Source/Emergency Justification	AMS 3.2.1.3.7, 3.2.2.4 & T3.2.2.4, Procurement Templates			
	Document: Rationale for Brand Name Products	T3.2.1 & T3.2.2.8, Procurement Templates			
	Buy American Act/Preference Certification or Waiver	T3.6.4			
	Statement of work, specifications, purchase description, drawings, or other appropriate technical description of the requirement	T3.2.1			
	Document: Independent Government Cost Estimate (IGCE)	T3.2.1 & T3.2.3			
	Government Furnished Property	T3.2.1, 3.10.3, & T3.10.3			
2	Coordination with Small Business Program Staff (AAP-20) for Procurements est. over \$250K	3.6.1 & T3.6.1			
	Document: Small Business Set Aside Determination and Coordination Form for 8(a), Small Business, Hub-Zone, SDVOSB, WOSB	3.6.1 & T3.6.1/Procurement Templates			
	Market Survey/Research/Analysis	3.2.1.2.1 & T3.2.1.2			
	Management Review & Legal Coordination and Review of Market Surveys and Analyses	T1.15			
	Reserved				
	Document: Final Single Source Justification Form (Service Organization Office, COR if applicable, Legal, AAQ Manager/CO/CS)	3.2.1.3.7, 3.2.2.4 & T3.2.2.4, Procurement Templates			
	Document: Procurement Plan required for procurements over \$25K (Template A Simplified and Commercial & Template B Other Than Simplified and Commercial)	3.2.1.1 & 3.2.1.2.2/Procurement Templates			
TAB	Procurement Reviews	AMS Reference	Y	N	N/A
8	Export Control Review	T3.6.4.A.14 & FAA Order 1240.13			
3	CIO Review if Procurement if equal or greater than \$250K and is for Information Resources	T3.2.1.A.3			
	Document: CIO IT Procurement Review and Approval Form	Procurement Templates			
	CFO Review if Procurement if equal or greater than \$10 MIL (including all options)	T3.2.1.4			
	Document: SCRB Phase I Template	Procurement Templates			
	Document: SCRB Phase II Template	Procurement Templates			
7	Security Review	3.14 & T3.14.1			
	Classified Security Requirements	3.14 & T3.14.1			
	Information, Personnel, and Physical Security as it related to suitability requirements and coordination	3.14 & T3.14.1			
	Document: OPM Position Designation Automated Tool	T3.14.1A.3 e (2)(b) (ii)"			
Source Selection					
TAB	Manage Solicitation & Evaluation Responses	AMS Reference	Y	N	N/A
5 & 6	Federal Supply Schedule Requirements/Documentation	T3.8.3			
	Purchase Order Clauses: Example NDAA Sec. 889, Buy American Act/Preference Clauses, etc.)	T3.6.4			
4 & 9	Public Announcement (over \$150K)/Request for Quote/Proposal	3.2.1.3.1.1 & T3.2.2.3.B.1			
13	Receipt of Contractor Quotes/Proposal	T3.2.2.3			
10	Unsuccessful Quotes	T3.2.2.3			
	Evaluation Methodology	T3.8.3			
	Rationale for Tradeoffs	T3.8.3			
	Buy American Act/Preference Certification or Waiver	T3.6.4			
	Price Reasonable Determination	T3.8.3			
12	Responsibility Determination Documentation (to include checking Sam.gov)	T3.2.2.7			



	Rationale for Not Using FFP or Performance Based Order	T3.8.3			
	Management Review & Legal Coordination and Review of Evaluation Reports & Plans	T1.15			
	Pre-Award Survey Information	T3.2.2.7			
	EEO Compliance/OFCCP Clearance (Over \$10 MIL)	AMS 3.6.2.1 & T3.6.2.A.14			
14	Award Decision Document/Negotiation/SSO Decision	3.2.2.3.1.2.5 & T3.2.2.3.A.10			
16	Service Organization Review				
15	Management & Legal Review & Coordination if Procurement > \$100 K (including all options)	T1.15			
	CFO Review if Procurement if equal or greater than \$10 MIL (including all options)	T3.2.1.4			
	Congressional/Public Affairs Notification > \$3.5 MIL (DOT Form 4220.41)	T3.13.1.A.3			
TAB	Make Award	AMS Reference	Y	N	N/A
17	Purchase Order Documentation/PRISM Award				
	Award Letter				
19	FPDS	T3.13.1			
18	Purchase Order Distribution w/ Attachments Award Notification - Contractor, Payment Office, Requiring Service Organization, COR, Budget/Finance Office, Security Office, Small Business Program Office, Property Office, AFA-100, AFI-100, QRO	T3.2.2.3.A.10			
	Contractor Debriefings	3.2.2.3.1.4 & T3.2.2.3.A.11			
	Management Review & Legal Coordination and Review	T1.15			
	Protest Documentation	T3.2.2.3.A.11			
Contract Administration					
TAB	Manage Award	AMS Reference	Y	N	N/A
20	Document: Letters of Delegation of Contracting Officer Representative	T3.10.1.A.3, Procurement Templates			
	Training/Certification of COR Complete	T3.10.1.A.3			
	Notification of COR Appointment to Acquisition Career Manager	T3.10.1.A.3			
	Notification of COR Revocation Letter	T3.10.1.A.3			
21	CPARS Evaluation	T3.10.1.B.9			
	Tax Exemption	T3.4.2			
	Payrolls and Labor Correspondence	T3.6.2			
22	General Correspondence	T3.10.1			
25	Government Property (List of Property, Review/Approval of Contractor's Property Control System, Reports, & Periodic Inventories)	3.10.3 & T3.10.3			
23	Record of Payment (Invoices, Progress Payment Documentation, Periodical Estimates, Payment Approvals/Certifications, Delphi Report)	3.3.1.2 & T3.3.1			
24	Security Reports	3.14 & T3.14.1			
26	FOIA Requests	T3.1.6.A.4			
27	Acceptance Reports	T3.10.4.A.4			
	Equitable Adjustments Documentation	T3.10.A.5			
29	Modifications	T3.10.1.A.5			
	Document: Option Exercise Notification	T3.2.4.A.9			
	Management Review & Legal Coordination/Review of Modifications affecting Govt. Obligations and Exercise of Options	T1.15			
	Justification for Modification (PR Request, SOW, IGCE, etc.)	T3.10.1.A.5			
	Procurement Team Review of Final Modification Documents	T1.15			
	Modification Documents (PRISM Award, Proposal Documents, IGCE etc.)	T3.10.1.A.5			
	Close-out & Terminate Award	AMS Reference	Y	N	N/A
28	Claims and Disputes				



	Cases				
	Termination	T3.10.6			
	Finding and Decisions of CO	T3.10.1.B.4			
	Management Review & Legal Coordination/Review of Termination/Disputes/Claims, etc.	T1.15			
	Appeals from Decisions				
21	CPARS (Past Performance)	T3.10.1.B.9			
30	Closeout	3.10.10 & T3.10.1			
	Document: Contract Closeout Checklist & Contract File Completion Statement	T3.10.1.B.4, Procurement Checklist			
	Property Clearance/Distribution				
	Final Release Documentation	T3.10.1.B.4			
	Statement of Liquidated Damages				
	Final Delivery	T3.10.1.B.4			
	Document: Contractor Release (DOT-4220.4)	T3.10.1.B.4, Procurement Forms			

