

Requisition Checklist

Equipment/Materials/Supplies Services, Repairs, & Mntce. (except Public Projects)	Public/Construction Projects
<p><u>1-\$999</u></p> <p><u>\$1,000-\$4,999</u> <input type="checkbox"/> One quote</p> <p><u>\$5,000-\$87,799</u> <input type="checkbox"/> Three quotes or justification</p> <p><u>\$87,800 or more</u> <input type="checkbox"/> Board Communication <input type="checkbox"/> Proof of Bid Advertisement <input type="checkbox"/> Formal Solicitation Documents (RFP, RFQ, etc.)</p> <p><u>Additional Requirements:</u> <input type="checkbox"/> Other documents as provided or as applicable</p> <p>Independent Contracts/Professional Services: <input type="checkbox"/> W-9 <input type="checkbox"/> Board Communication if ≥\$25K <input type="checkbox"/> Fully Executed Contract <input type="checkbox"/> Certificate of Insurance (if applicable)</p> <p>64XX or 65XX: <input type="checkbox"/> Vendor Payment Bond if installation >\$25K</p> <p>IT Hardware/Software, License, Mntce/Repair: <input type="checkbox"/> Approval email from Rick or request submitted by IT</p> <p>Furniture/Signage/ Installation/Equipment: <input type="checkbox"/> Email approval from Ex. Director Facilities Services</p> <p>Imprinted Items (logo or AVC use): <input type="checkbox"/> Approval from PIO (e-mail, signed quote, etc.)</p> <p>Long Term Leases: <input type="checkbox"/> Board Communication <input type="checkbox"/> Fully Executed Contract <input type="checkbox"/> Payment Schedule</p> <p>One Time Lease: <input type="checkbox"/> Fully Executed Contract</p> <p><u>Final Payment Requirements</u> <input type="checkbox"/> Vendor Invoice or Payment Application <input type="checkbox"/> Proof of Receipt</p>	<p><u>\$1-\$999</u> <input type="checkbox"/> Fully Executed Contract <input type="checkbox"/> Certificate of Insurance</p> <p><u>\$1,000-\$4,999</u> <input type="checkbox"/> One quote <input type="checkbox"/> PWC-100 <input type="checkbox"/> Fully Executed Contract <input type="checkbox"/> Certificate of Insurance</p> <p><u>\$5,000-\$14,999</u> <input type="checkbox"/> Three quotes or justification <input type="checkbox"/> PWC-100 <input type="checkbox"/> Fully Executed Contract <input type="checkbox"/> Certificate of Insurance</p> <p><u>\$15,000 or more</u> <input type="checkbox"/> PWC-100 <input type="checkbox"/> Fully Executed Contract <input type="checkbox"/> Certificate of Insurance <input type="checkbox"/> Board Communication <input type="checkbox"/> Proof of Bid Advertisement <input type="checkbox"/> Formal Solicitation Documents (RFP, RFQ, etc.)</p> <p><u>Additional Requirements:</u> <input type="checkbox"/> Other documents as provided or as applicable</p> <p>Furniture/Signage/ Installation/Equipment: <input type="checkbox"/> Email Approval from Ex. Director Facilities Services</p> <p>IT Hardware/Software, License, Mntce/Repair: <input type="checkbox"/> Approval email from Rick or request submitted by IT</p> <p>Imprinted Items (logo or AVC use): <input type="checkbox"/> Approval from PIO (e-mail, signed quote, etc.)</p> <p><u>Final Payment Requirements</u> <input type="checkbox"/> Vendor Invoice or Payment Application <input type="checkbox"/> Proof of Receipt <input type="checkbox"/> Application & Cert. for Payment with Approval</p>

NOTE: The Requisition Checklist is provided as a guideline to assist District staff when uploading supporting documentation to a Requisition. Under special circumstances, additional documentation may or may not be requested by the Business Services Area.

Requisition Checklist

Capital Projects – 6100 (Site/Improvement of Sites) and 6200 (Building/Improvement of Buildings)

Equipment, Materials, Supplies, Mntce. Services, and Misc. Biddable Services	Public/Construction Projects	Independent Contracts/Professional Services
<p><u>\$1-\$999</u></p> <p><u>\$1,000-\$4,999</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> One quote <p><u>\$5,000-\$14,999</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Three quotes or justification <p><u>\$15,000 or more</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Board Communication <input type="checkbox"/> Payment Schedule <input type="checkbox"/> Proof of Bid Advertisement <input type="checkbox"/> Formal Solicitation Documents (RFP, RFQ, etc.) <p><u>Additional Requirements</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Other documents as provided or as applicable <p><u>Service/Installation:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Fully Executed Contract <input type="checkbox"/> Board Communication <p><u>IT Hardware/Software, License, Mntce/Repair:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Approval email from Rick or request submitted by IT <p><u>Furniture/Signage/ Installation/Equipment:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Email approval from Ex. Director Facilities Services <p><u>Imprinted Items (logo or AVC use):</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Approval from PIO (e-mail, signed quote, etc.) <p><u>Long Term Leases:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Board Communication <input type="checkbox"/> Fully Executed Contract <input type="checkbox"/> Payment Schedule <p><u>One Time Lease:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Fully Executed Contract <p><u>Final Payment Requirements</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Recorded Notice of Completion <input type="checkbox"/> Proof of Receipt <input type="checkbox"/> Vendor Invoice or Payment Application 	<p><u>\$1-\$999</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Fully Executed Contract <input type="checkbox"/> Board Communication <input type="checkbox"/> Certificate of Insurance <p><u>\$1,000-\$4,999</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Fully Executed Contract <input type="checkbox"/> Board Communication <input type="checkbox"/> Certificate of Insurance <input type="checkbox"/> One quote <input type="checkbox"/> PWC-100 <p><u>\$5,000-\$14,999</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Fully Executed Contract <input type="checkbox"/> Board Communication <input type="checkbox"/> Certificate of Insurance <input type="checkbox"/> Three quotes or justification <input type="checkbox"/> PWC-100 <p><u>\$15,000 or more</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Fully Executed Contract <input type="checkbox"/> Board Communication <input type="checkbox"/> Certificate of Insurance <input type="checkbox"/> PWC-100 <input type="checkbox"/> Vendor payment/performance bonds >\$25K <input type="checkbox"/> Proof of Bid Advertisement <input type="checkbox"/> Formal Solicitation Documents (RFP, RFQ, etc.) <p><u>Additional Requirements:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Other documents as provided or as applicable <p><u>Furniture/Signage/ Installation/Equipment:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Email Approval from Ex. Director Facilities Services <p><u>IT Hardware/Software, License, Mntce/Repair:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Approval email from Rick or request submitted by IT <p><u>Final Payment Requirements</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Recorded Notice of Completion <\$15K <input type="checkbox"/> Board Acceptance of Completed Project <\$15K <input type="checkbox"/> Vendor Invoice or Payment Application <input type="checkbox"/> Proof of Receipt <input type="checkbox"/> Application & Cert. for payment with approval <input type="checkbox"/> Escrow Agreement (if applicable) 	<p><u>\$1-\$999</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> W-9 <input type="checkbox"/> Board Communication <input type="checkbox"/> Fully Executed Contract <p><u>\$1,000-\$4,999</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> One quote <input type="checkbox"/> W-9 <input type="checkbox"/> Board Communication <input type="checkbox"/> Fully Executed Contract <p><u>\$5,000-\$14,999</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Three quotes or justification <input type="checkbox"/> W-9 <input type="checkbox"/> Board Communication <input type="checkbox"/> Fully Executed Contract <p><u>\$15,000 or more</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> W-9 <input type="checkbox"/> Board Communication <input type="checkbox"/> Fully Executed Contract <input type="checkbox"/> Proof of Bid Advertisement <input type="checkbox"/> Formal Solicitation Documents (RFP, RFQ, etc.) <p><u>Additional Requirements:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Other documents as provided or as applicable <input type="checkbox"/> Certificate of Insurance (if applicable) <p><u>IT Related Services:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Approval Email from Rick or Request Submitted by IT <p><u>Furniture/Signage/ Installation/Equipment:</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Email approval from Ex. Director Facilities Services <p><u>Imprinted Items (logo or AVC use):</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Approval from PIO (e-mail, signed quote, etc.) <p><u>Final Payment Requirements</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Vendor Invoice or Payment Application <input type="checkbox"/> Proof of Receipt <input type="checkbox"/> Escrow Agreement (if applicable)