



Purchase Order Checklist

Office Use Only	GLBU Number	PR Number	Credit Card?	
			Yes	No

Section 1: Preferred Source

Are the commodities or services available from a Preferred Source?		Yes	No
<i>Check all that apply</i>	Requirement Threshold	Documentation	Comments
	Labor	Prevailing Wage Rates (provide PRC #) Article 8 - all. Article 9 > \$1,500	PRC Number
	Services > \$50,000	OGS Procurement Approval Required OSC Approval > \$85,000	
	Services and Commodities > = \$50,000	B1184 Approval	B1184 Number
	Technology Services and Commodities > \$50,000	PTP Approval (Technology related)	
	Agency decision <u>not</u> to use a preferred source.	Attach form, function, and utility declination, or waiver (required).	

Section 2: NYS Centralized Contract

Are the commodities or services available on a NYS Centralized Contract?		Yes No	NYS Contract Number	Expiration Date
<i>Check all that apply</i>	Requirement Threshold	Documentation	Comments	
	Any Amount	Obtain itemized written quote or provide list of NYS contract item numbers in requisition. If pricing has been verified against contract, attach pricing pages from contract.	PRC Number	
	Any Amount	Review contract specific requirements.		
	Amount > = \$50,000	Provide B-1184 approval number (required for specific types of procurement).	B1184 Number	
	Technology Services and Commodities > \$50,000	PTP Approval (Technology related)		
	Agency decision <u>not</u> to use a New York State Contract.	Attach or provide a statement as to why the contract item does not meet the form, function, and utility required (required).		





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Section 3: Open Market			
Are the commodities or services available on the open market?	Yes No	Vendor Name	Contact Name Contact Phone
Check all that apply	Requirement Threshold	Documentation	Comments
	Labor	Prevailing Wage Rates (provide PRC number) Article 8 - all. Article 9 > \$1,500	PRC Number
	Labor	Attach proof of Workers Compensation, Disability, and Liability insurance coverage (services only).	
	Any Amount	Appendix A - if any of the vendor's terms and conditions conflict with Appendix A.	
	Any Amount	Reasonableness of price. Explain Agency's method of determination and attach documentation. For example, prior PO, prior invoice, published price list, Internet search or Sole Source letter.	
	Amount < \$2,500	One informal quote.	
	Amount > \$2,500	One valid written quote.	
	Amount > \$10,000	Three valid comparable written quotes.	
	Amount > \$15,000	Procurement lobbying form.	
	Amount > \$500 / \$20,000	Provide B-1184 approval number. Attach B-1184 approval document if procurement requires OSC approval. See page 4 on NYS Purchasing Requirements for approval thresholds.	B1184 Number
	Amount > \$50,000	Announce procurement opportunity in Contract Reporter.	
	Amount > \$85,000	Vendor is MWBE, SBE, or SDVOB and purchase <= \$500,000. See page 3 on NYS Purchasing Requirements for additional requirements If not MWBE, SBE, or SDVOB purchase > \$85,000 competitive solicitation required - (IFB, RFQ, RFP) contact BSC for guidance.	