



# Purchase Order Checklist

<b>Office Use Only</b>	GLBU Number	PR Number	Credit Card?	
			Yes	No

## Section 1: Preferred Source

Are the commodities or services available from a Preferred Source?		Yes	No
Check all that apply	Requirement Threshold	Documentation	Comments
	Any Amount	A valid Price Concurrence/Agreement/Quote/Online Pricing Documentation	
	Labor	Prevailing Wage Rates <u>Provide PRC #</u> → _____ Article 8 - all. Article 9 > \$1,500 Article 8 - Provide DOL Certificate of Registration	
	Amount > \$50,000	B1184 Approval <u>Provide B1184 #</u> → _____	
	Technology Services and Commodities > \$50,000	PTP Approval (technology related)	
	Amount > \$85,000	OSC Approval > \$85,000 OGS Approval Required ≥ \$100k or more	
	Agency decision <b>not</b> 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	NYS Contract Number	Expiration Date
		No		
Check all that apply	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, Article 8 - Provide DOL Certificate of Registration <u>Provide PRC #</u> → _____		
	Any Amount	Review contract specific requirements.		
	Amount > = \$50,000	Provide B-1184 approval number (required for specific types of procurement). <u>Provide B1184 #</u> → _____		
	Technology Services and Commodities > \$50,000	PTP Approval (Technology related)		
	Agency decision <b>not</b> 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).		



## Purchase Order Checklist (page 2)

### Section 3: Open Market

Are the commodities or services available on the open market?	Yes No	Vendor Name	Contact Name	Contact Phone
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<i>Check all that apply</i>	Requirement Threshold	Documentation	Comments
	Labor	Prevailing Wage Rates <u>Provide PRC #</u> _____ Article 8 - all. Article 9 > \$1,500 Article 8 - Provide DOL Certificate of Registration	
	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.  <u>Provide B1184 #</u> _____  <a href="#">See page 4 on NYS Purchasing Requirements for approval thresholds.</a>	
	Amount > \$50,000	Announce procurement opportunity in Contract Reporter.	
	Amount > \$85,000	Vendor is MWBE, SBE, or SDVOB and purchase <= \$750,000. <a href="#">See page 3 on NYS Purchasing Requirements for additional requirements</a> If not MWBE, SBE, or SDVOB purchase > \$85,000 competitive solicitation required - (IFB, RFQ, RFP) contact BSC for guidance.	