ORDER AUDIT SHEET

☐ NON-COMPETITIVE PROCUREMENTS
  ☐ Sole Source
  ☐ TIBH
  ☐ AgriLife Master Order No. _______________________
  ☐ E & I Contract No. ______________________________
  ☐ DIR Contract No. ______________________________
  ☐ TXMAS Agreement No. _________________________
  ☐ TAMU Agreement No. __________________________
  ☐ Buyboard Contract No. __________________________
  ☐ Non-Compliant Order – Non-Compliant Order Explanation (AG-628) form completed
  ☐ Other ________________________________________

☐ ALL PURCHASES
  ☐ HUB vendors have active status on TPASS lists
  ☐ Nature of item requested is within mission
  ☐ Checked TPASS state contract, scheduled purchase, or available through group purchases
  ☐ Tax Status: Vendor hold checked – check for State vendor hold and debarred website
  ☐ Federal Suspension/Exclusion Status (EO13224 Compliance): Vendor has no active exclusions (https://www.sam.gov/)
  ☐ Check PCC code – State funds only – Doc Type 9 – LDT 65 – HIED (unless State Contract)
  ☐ Evaluate HB620 – Preference if applicable; Tie bids only: Not applicable for federal funds
  ☐ HUB subcontracting packet or waiver included for all orders over $100,000.00
  ☐ Reviewed by Environmental Safety / Biosafety / Engineering / Facilities, if applicable.
  ☐ Capital equipment allowed on this account; Contact Contracts & Grants: 4XXXXX & 5XXXXX accounts
  ☐ ARRA Funds (verify account using FAMIS screen 029) Yes______ No______
  ☐ Commodity code included for each line item in FAMIS

☐ FEDERAL FUNDS
  ☐ Indicate type of funds as federal in FAMIS on screen 410 and/or 220
  ☐ Include any additional federal clauses for all bids based on commodity or service
  ☐ Include ARRA clause (text code 051), if applicable
  ☐ Attached federal terms and conditions page to purchase orders not routed through the bidding process
  ☐ Federal Representations & Certifications (https://www.sam.gov/) or checklist completed and on file in Laserfiche
  ☐ Reasonable Price/Cost Analysis form completed
  ☐ Checked to see if lease option is available, if applicable
  ☐ Project administration approval obtained for non-competitive procurements

☐ SOLE SOURCE JUSTIFICATION
  ☐ FAMIS screen completed and/or Sole Source Justification (AG-601 or AG-602) form completed
  ☐ Signed by Director of Purchasing

☐ SERVICES
  ☐ Period of services is in specifications of Invitation for Bid and order
  ☐ Method of payment in specifications
  ☐ If renewable, indicate what time period, i.e.: 1 of 2, 2 of 2, - not to exceed 5 years
  ☐ If renewable, signed agreement attached
  ☐ Approved Independent Contractor (AG-106) form attached, if applicable

☐ INSURANCE AND BONDING
  ☐ Insurance required? Yes_____ No_____ Paperwork received? Yes_____ No_____
  ☐ Bonding required? Yes_____ No_____ Paperwork received? Yes_____ No_____

PO #____________________
Initials____________________
Date______________________
INFORMALLY BID PURCHASES
- Bid tabulation included
- Shows all vendors solicited on bid tabulation
- Solicited from at least 6 vendors with a minimum of 4 HUBs (at least 1 minority and 1 female owned) or reason why not
- Solicited from vendors who can reasonably be expected to sell product
- Low bid accepted, or explanation why not
- The term F.O.B. Destination is included - freight included or added
- Page of purchase order terms and conditions is included with vendor copy

FORMALLY BID PURCHASES
Invitation for Bid:
- Bid period is 10 business days and 14 calendar days
- Bid is signed by vendor
- Specifications are not restrictive
- Extensions and totals are correct
Bid Tabulation:
- Bid tabulation is included
- Solicited from at least 6 vendors with a minimum of 4 HUBs (at least 1 minority and 1 female owned) or reason why not
- Solicited from vendors who can reasonably be expected to sell product
- All solicited vendors appear on bid tabulation
- HUB status appears on bid tabulation
- Low bid accepted, or explanation why not
Texas Marketplace:
- Posted bid and award to the Texas Marketplace

EMERGENCY PURCHASES
- Emergency Justification (AG-603) form completed
- Form signed by Director of Purchasing
- If possible, are there 3 informal bids, including HUBs?  Yes______  No______  If no, why not?

USED EQUIPMENT AND TRADE INS
- Trade-in a separate item on bid and order
- Trade-in statement on Invitation for Bid and order
- Trade-in asset number listed in description of item
- Used or demonstrator specified in Invitation for Bid and order
- Used equipment justification and valuations attached

BULK FUEL MASTER ORDERS
- Terminal price sheet or OPIS rack price is included
- Terminal price sheet or OPIS rack price date fall in between the dates on the Invitation for Bid
- Constant markup shown and includes tax on undyed diesel and unleaded gases
- Price on bid agrees with terminal price sheet or OPIS rack price
- Beginning and ending dates on Purchase Order
- If renewal, signed agreement attached
- Attachments must agree with period of contract, i.e.:  1 or 2 years and renewal periods

NOTES / ADDITIONAL COMMENTS
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Revised 06-04-2013