

# One-Time Acquisitions Requisition Checklist

The following documents are required before OTA can execute a purchase:

Purchase Type	IT Goods and Services	Non-IT Goods
All Purchases	<a href="#">SIMM 71B</a>	
	Statement of Work	Specifications
	Deadline	
	Draft Cost Worksheet	
	Administrative Requirements	
<b>Additional Required Documents</b>		
Repeat Purchases	Prior purchase order/Contract	
NCB/LTB/SCR	<a href="#">NCB Unit approval</a>	
	<a href="#">STD 821</a>	
	Deadline	
	Administrative Compliance Forms/Documents, e.g., Civil Rights Certification, Iran Contracting Act, Payee Data Record, etc.	
Proprietary Software under \$1,000,000	IT PAC approval – memorandum or Fi\$Cal approval flow	
Proprietary Software \$1,000,000 and over	Approved <a href="#">NCB/SCR</a> required	
Commercial Off the Shelf (COTS) software and Software as a Service (SaaS)	<a href="#">SIMM 22B</a>	
Infrastructure as a Service and Platform as a Service	<a href="#">SIMM 18C</a>	
LPAs	LPA number	
	LPA Price List with applicable line items highlighted	
	Assessment Plan if applicable	
	Assessment documents if applicable e.g., contractor references, technical response, etc.	
	If using CMAS or SLP, at least five potential suppliers, with contact information. Include SB/DVBE suppliers if possible.	
	If using a Master Agreement and the User Instructions require multiple offers, at least five potential suppliers, with contact information. Include SB/DVBE if available.	
Personal Services	GC 19130 Justification	GC 19130 Justification if the Goods purchase includes services

	Bargaining Unit notification	Bargaining Unit notification if the Goods purchase includes services
SB/DVBE Option	List of at least five potential certified SBs or DVBEs to solicit	
Vehicles		OFAM approval – memorandum or Fi\$Cal approval flow
		FAP number
Printing Services	<a href="#">Approved Printing Services Exemption Request (PSER)</a>	
Printing equipment over \$50,000	<a href="#">Approved Printing Equipment Acquisition Request (PEAR)</a>	
DVBE requirement waived	<a href="#">STD 816</a>	
Not using Mandatory LPA (Statewide Contract, Master Agreement)	<a href="#">Contract administrator approval</a>	
Not using CalPIA item		<a href="#">CalPIA approved exemption</a>