

SY 2016-2017 PROCUREMENT REVIEW DOCUMENTATION CHECKLIST	
General	Received "X"
Written Code of Conduct	
Documented Procurement Procedures (includes micro-purchases, small purchases, IFBs and RFPs, and FSMC & processing contracts, as applicable)	
SFA Procurement Table	
Vendor Paid List/Summary Report: Total Expenditures by Vendor (<i>nonprofit food service account only</i>)	
Micro-purchases (<i>Vendors selected for review</i>)	"X"
Purchase orders issued	
Receipts/Invoices	
Small Purchase Procurements (<i>Vendors selected for review</i>)	"X"
Solicitation documents (including specifications, evaluation criteria)	
Bid Quotes/Responses	
Evaluation of Responses for Award	
Purchase orders	
Receipts/Invoices	
Formal Procurements (<i>Documents for vendors selected</i>)	"X"
Solicitation documents (including specifications, evaluation criteria, contract terms, conditions, etc.)	
Bidder/Offeror responses	
Evaluation of responses for contract award	
Executed contracts	
Contract renewal/addendum/amendments, if applicable (since original contract was awarded)	
Cost/price analysis documentation	
Non-competitive proposal authorization, if applicable	
Invoices (minimum of 3 vendor invoices identifying goods/services procured and amount paid)	
FSMC – Base Year (<i>For State agencies reviewing the SFA-FSMC base year. Documents for vendor(s) selected. Executed contract is not required as this is on file with the State agency</i>)	"X"
Solicitation documents (includes specifications, evaluation criteria, contract terms, conditions, etc .)	
Bidder/Offeror responses	
Evaluation Documents/Scoring Sheets	
Notification to vendors of rejected bids/offers, if applicable	
FSMC Invoices (minimum of 3 FSMC invoices)	
USDA Foods credits (total for prior year – applies to both fixed-price and cost reimbursable contracts)	
Reconciliation of discounts, rebates, credits, if applicable (cost reimbursable contracts only)	
FSMC – Review Year (<i>For reviews in renewal years, A review of executed renewal/amendments are not required as these are on file in the State agency.</i>) Review: above items only if not reviewed in base year.	"X"
FSMC invoices	
Reconciliation for USDA Foods (for prior year –both fixed-price and cost-reimbursable contracts)	
Reconciliation of discounts, rebates, and credits, if applicable (cost-reimbursable contracts only)	
Processing (<i>Contact the State Distributing Agency (SDA) to determine if the State procures processors on behalf of SFAs. If no, obtain the following documents from the SDA or SFA:)</i>	"X"
SDA template agreement/contract for processors	
SDA list of approved foods for processing	
SFA Planned assistance level (from prior school year)	
SFA Solicitation documents, vendor bids/responses, evaluation for contract award and executed contracts for selected vendors	
Contract Renewals/addenda/amendments, if applicable	
Reconciliation of USDA Foods received, if applicable	