



NOAA

FIELD DELEGATE CONFERENCE
NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION



PURCHASE ORDER FILE CONTENT AND ORGANIZATION

OVERSIGHT & COMPLIANCE BRANCH (OCB)

Presented by:

Sharon Webster-Tyson/Paulette Williams

Sharon.K.Tyson@noaa.gov

paulette.williams@noaa.gov

*Awarding Stronger Acquisition In
Changing Times*



NOAA

FIELD DELEGATE CONFERENCE
NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION



OBJECTIVE

- Establish consistency of purchase order filing within the Field Delegate program.
- Provide guidance pertaining to purchase order file assembly--
 - 1) what documents to retain in the purchase order
 - 2) how to maintain a neat, and organized purchase order
 - 3) where to file contract documents in the purchase order



NOAA

FIELD DELEGATE CONFERENCE
NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION



PURCHASE ORDER FILE ASSEMBLY

➤ **What type of documents to include in the file—**

- All documents pertaining to the pre-award, award, and administration phase of the acquisition

- All inter-office documents as well as any other documents from outside the office that support the acquisition



NOAA

FIELD DELEGATE CONFERENCE
NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION



PURCHASE ORDER FILE ASSEMBLY

How to maintain a neat, and organized purchase order file—

- ✓ Build the file in an order of progression; e.g., Purchase Request is first document received and filed, with other documents filed on top of PR in a chronological order or in a logical sequence.
- ✓ Do not file duplicate copies of documents.
- ✓ Do not file sticky notes that can be easily lost.
- ✓ Make sure all documents are legible, especially hand-written documents.
- ✓ Use pre-printed folder, index, table of contents, tabs (whatever is available to help identify the file content).



NOAA

FIELD DELEGATE CONFERENCE
NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION



PURCHASE ORDER FILE ASSEMBLY

- **Where to file contract documents in the purchase order (NAHB Pt 13)—**
- **Pre-Award Actions** (inside left cover)

Tab 1-- Purchase Request

- Statement of Work/Specifications
- IT Security Checklist (Service only)
- Independent Government Estimate (IGE)
- Bidder's List
- documentation indicating Required Sources of Supply were checked
- 508 Compliance Checklist



NOAA

FIELD DELEGATE CONFERENCE
NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION



PURCHASE ORDER FILE ASSEMBLY

➤ Pre-Award Actions (inside left cover)

Tab 2 – Synopsis/RFQ (SF 18)/E-buy

- Wage Determinations
- JOFOC/Brand Name Justification/Limited Sources Justification (GSA)
 - Supporting documentation from requiring activity
- Exception to synopsis (FAR 5.202(a)(11))
- Justification for use of options & basis for evaluation (FAR 17.205 & 17.206)
- CD-570 – Small business set-aside review (FAR 19.502)



NOAA

FIELD DELEGATE CONFERENCE
NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION



PURCHASE ORDER FILE ASSEMBLY

➤ Pre-Award Actions (inside left cover)

Tab 3 – Quotes/Offer Responses and Abstract of Quotes

Tab 4 – Price Reasonableness Memorandum
-- ‘Selection of other than Low’ Memo

Tab 5 – Central Contractor Registration (CCR)
-- On-line Certifications and Representations Application (ORCA)
-- Excluded Parties List System (EPLS)

Tab 6 – FPDS Record



NOAA

FIELD DELEGATE CONFERENCE
NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION



PURCHASE ORDER FILE ASSEMBLY

➤ Post-Award Actions (inside right cover)

Tab 7 – Award Document (PO, DO, or TO) to include distribution
-- Obligation printout from Cbuy

Tab 8 – Modification(s) {SF 30}
-- Memo for the record explaining purpose of modification
-- Fair and reasonable price determination (FAR Part 13)
-- Determination and Findings to exercise options (FAR 17.207)

Tab 9 – Correspondence

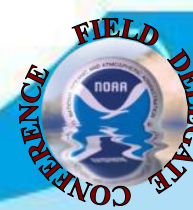
Tab 10—Invoice(s) & Tracking Sheet, Closeout documents



NOAA

FIELD DELEGATE CONFERENCE

NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION

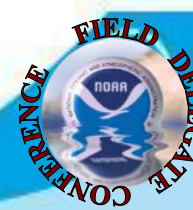


Checklist for Purchase/Task/Delivery Orders (SAMPLE)		
Document	Location (Tab)	(X)=required complete (NA)=not applicable
Pre Award Actions (inside left cover)		
Procurement Request, Statement of Work/Specs IT Security Checklist (Svc only), IGE, Bidder's List <u>Additional Docs (if applicable):</u> - Documentation that required sources of supply checked - 508 Compliance Checklist	1	
Synopsis/RFQ (SF18) /E-buy - Wage Determinations (if applicable) - JOFOC/Brand Name Justification /Limited Sources Justification <i>(if applicable)</i> -- Supporting documentation from requiring activity - Exception to synopsising (FAR 5.202(a)(11)) - Justification for use of options & basis for evaluation (FAR 17.205 & 17.206) <i>(If applicable)</i> - CD570- small business set aside review (FAR 19.502) <i>(if applicable)</i>	2	
Quotes/Offer Responses and Abstract	3	
Price Reasonableness Memorandum - 'Selection of other than Low' Memo <i>(if applicable)</i>	4	
Central Contractor Registration (CCR) On-line Representations & Registration Application (ORCA) Excluded Parties List System (EPLS)	5	
FPDS Record	6	
Post Award Actions (inside right cover)		
Award Document (i.e. PO, DO or TO) to incl. distribution Obligation printout from C Buy	7	
Modification(s) {SF-30} – w/ justification memo - Fair & Reasonable Price Determination (FAR Part 13) - Determination & Findings to exercise option (FAR 17.207) <i>(if applicable)</i>	8	
Correspondence	9	
Invoice(s) & Tracking Sheet, Closeout	10	



NOAA

FIELD DELEGATE CONFERENCE
NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION



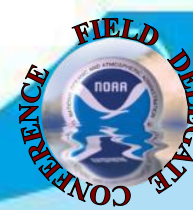
*Awarding Stronger Acquisitions In
Changing Times*



NOAA

FIELD DELEGATE CONFERENCE

NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION



*Awarding Stronger Acquisitions In
Changing Times*