



Instructions for using File Format Checklists



The File Format Checklists were developed by the Acquisition and Property Division (APD) in order to capture the record-keeping functions detailed in FAR Subparts 4.803 and 4.804. The use of these Checklists is mandatory for all procurement actions. The Checklists contain lists for Contracts, with separate Checklists for different types of Construction and A-E Contracting, and Small Purchases, etc.. The Supply/Services Contracts Checklists are broken down into phases, to include: 1. Pre-Award Phase: a) Acquisition Planning; b) Procurement Request & Solicitation Development; c) Solicitation & Evaluation; and 2. Post-Award Phase: a) Award; b) Contract Administration; and c) Closeout.

The intent of the Checklists is to: facilitate the processing of all procurement actions, assuring file requirements are not inadvertently overlooked; present a professional work format; and, enable a more expeditious review of contract files.

All Checklists contain references to APD's Web site at <http://www.afm.ars.usda.gov/acquisitions/index.htm> as well as FAR, AGAR, and USDA references which require the submission of the referenced document.

Any future revisions to the Checklists will be coordinated by the Acquisition Programs and Oversight Branch and posted to the APD's Web site.



USDA, REE, ARS



Checklist for File Content

See FAR Subpart 4.803

Phase I

revised: 5/2005

Place document in file. If document is required, place an "X" in the "IN FILE" column, or use folder identifier if there is more than one folder.

DOCUMENT		IN FILE	DOCUMENT	IN FILE
	Acquisition Planning		23.	
1.	Acquisition Plan FAR 7.1		24.	
2.	Market Research Analysis/RFI FAR 7.102, 10, 12.202, marketre.doc		25.	
3.	Exchanges with Industry before Receipt of Proposals FAR 14.207, 15.201		26.	
4.	Industry Terms and Conditions		27.	
5.	General Requirements FAR 8.001		28.	
6.	Set-aside Consideration/Recommendations/Determination (OSDBU Clearance) FAR 19.501, 19.803		29.	
7.	Pro-Net Search		30.	
8.	Quality Assurance Requirements FAR 46.2		31.	
9.	Draft Documents and Disposition		32.	
10.			33.	
11.			34.	
12.			35.	
13.			36.	
14.			37.	
15.			38.	
16.			39.	
17.			40.	
18.			41.	
19.			42.	
20.			43.	
21.			44.	
22.			45.	

REQUISITION NO./SOLICITATION NO.	AMOUNT
CONTRACTING OFFICER/TELEPHONE	COR/TELEPHONE
CONTRACTOR	PURCHASE REQUEST INITIATOR/TELEPHONE
CONTACT/TELEPHONE	CONTRACT NO.



USDA, REE, ARS



Checklist for File Content

See FAR Subpart 4.803

Phase II

revised: 5/2005

Place document in file. If document is required, place an "X" in the "IN FILE" column, or use folder identifier if there is more than one folder.

DOCUMENT		IN FILE	DOCUMENT		IN FILE
	Procurement Request & Solicitation Development		26.	Specification Review by Competition Advocate FAR 6.5	
1.	Acquisition Package (AD-700, SPEC/Drawings/SOW/SOO/PWS, Government Estimate, Source List) FAR 7.302, 11; AGAR 411.1, 411.2		27.	PBSC Waiver FAR 37.6; PPD PM 37-02	
2.	List of GFE/GFI/GFP and Approvals FAR 45.3; AGAR 445.3		28.		
3.	Determination to Make a Single Award FAR 16.504(c)		29.		
4.	Ratification Documentation FAR 1.602-3; AGAR 401.602-3; AA212-16		30.		
5.	JOFOC FAR 6.3; AGAR 406.302-70; PPD PM 6-03		31.		
6.	Pre-solicitation Synopsis/Notice, Response/Evaluation FAR 5.2; AA37; PPD PM 5-02		32.		
7.	D&F: Authority to Exclude a Source FAR 6.202(b)		33.		
8.	Descriptive Literature Justification FAR 14.202-5(c)		34.		
9.	Brand Name Justification FAR 6.302-1(c); 11.1		35.		
10.	Bid Samples Justification FAR 14.202-4(d)		36.		
11.	Option Justification FAR 17.205		37.		
12.	Contract Type Justification FAR 16.102(d)		38.		
13.	D&F: Interagency Acquisitions (Economy Act) FAR 17.503		39.		
14.	Buy American Act Exception Determination FAR 25.103		40.		
15.	Non-Personal Service Documentation FAR 37.103(a)(3)(ii)		41.		
16.	Approval of Letter Contract FAR16.603-3; AGAR 416.603		42.		
17.	Notice of Intent to Award Service Contract/Wage Determination/Installation Review FAR 22.1000		43.		
18.	Draft RFP, Comments and Disposition FAR 15.201(c)(6), 15.201(f)		44.		
19.	Solicitation Reviews, Comments, Approvals FAR 14.202-6; DR 5000-4; PPDG-CRB		45.		
20.	Liquidated Damages Justification FAR 11.5, 19.75-7, 22.302; AGAR 422.302		46.		
21.	OGC (Legal) Review DR 5000-4		47.		
22.	Pre-solicitation Correspondence FAR 5.2		48.		
23.	Memoranda for Record		49.		
24.	Agency Offering Letter to SBA for 8(a) FAR 19.804-2		50.		
25.	SBA Acceptance/Correspondence		51.		



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Checklist for File Content

See FAR Subpart 4.803

Phase III

revised: 5/2005

Place document in file. If document is required, place an "X" in the "IN FILE" column, or use folder identifier if there is more than one folder.

DOCUMENT		IN FILE	DOCUMENT	IN FILE
Solicitation & Evaluation			27. Communication with Offerors after Establishment of Competitive Range (FAR 15.306(d))	
1.	Prebid/Proposal Conference Minutes FAR 14.207, 15.201(F)		28. Final Proposal Revisions FAR 15.307, fpr.doc	
2.	IFB/RFI/RFP/RFQ (Including Amendments & Attachments) FAR 14.2, 15; AGAR 414.2, 15		29. Source Selection Decision FAR 15.308	
3.	FedBizOpps Notification FAR 5.201		30. Price Reasonableness Determination FAR 12.209, 15.305(a)(1)	
4.	Bidder's List FAR 4.803(a)(5), 14.205		31. Price Negotiation Memorandum FAR 15.406-3, pricneg.doc	
5.	Abstract of Bids/Proposals FAR 14.403		32. Cost and Pricing Data, or other the Cost and Pricing Data FAR 15.4	
6.	Accepted Bids, Proposals		33. D&F: Authorization for Advance Payments FAR 32.410; AGAR 432.4	
7.	Late Bids, Proposals, Mistakes, Determinations FAR 14.304, 14.407, 15.208; AGAR 414.4		34. Subcontracting Plan and Review FAR 19.702, 19.705-4	
8.	IFB/RFP Cancellation/Rejection Determination FAR 14.404-1, 15.208(e); AGAR 414.404-1		35. Letters to Unsuccessful Offerors (FAR 15.503, sryltr.doc, intawd.doc, awdnotic.doc	
9.	Pre-Award Survey FAR 9.106		36. Debriefing Summaries FAR 15.5, 42.504, debrief.doc	
10.	Determination of Responsibility/Non-responsibility FAR 9.105-2; AA45		37. Memoranda for Record	
11.	Certificate of Competency Actions FAR 19.6; AGAR 419.6		38. Parties Excluded from Procurement Programs – Responsibility Determination FAR 9.405; AGAR 409.405	
12.	EEO Compliance Review FAR 22.805; eoclear.doc		39. Correspondence	
13.	Influencing Activities Disclosure Forms FAR 3.804		40. Pre-award Protests FAR 33.103, 19.302, 19.305, 33.104	
14.	Make or Buy Decisions FAR 15.407-2		41.	
15.	New Technology, Patents, Data Rights Determinations FAR 27		42.	
16.	Contract Deviations FAR 1.4; AGAR 401.4		43.	
17.	Software License Agreements FAR 12.212, 27.400; DR 5000-4		44.	
18.	Overtime Premium Approval FAR 22.103-4; AGAR 422-103-4		45.	
19.	Cancellation/Conversion to RFP FAR 14.401-1(e)- (f); PPD PM 14-01, 14-01A, 14-02		46.	
20.	Waiver of Facilities FAR 15.408(ii)		47.	
21.	SEB/SSA/TEP Appointments tepchair.doc, tepmemb.doc		48.	
22.	Proposal Evaluation/TEP Worksheets, to Include Past Performance Evaluation FAR 15.305; AA43		49.	
23.	TEP Evaluation Report teceval.doc		50.	
24.	Cost/Price Analysis FAR 15.404; AGAR 415.404-4		51.	
25.	Competitive Range Determination FAR 15.306(c), DR 5000-4, comprang.doc		52.	
26.	Pre-negotiation Objectives/Memorandum FAR 15.406-1		53.	



USDA, REE, ARS



Checklist for File Content

See FAR Subpart 4.803

Phase IV

revised: 5/2005

Place document in file. If document is required, place an "X" in the "IN FILE" column, or use folder identifier if there is more than one folder.

DOCUMENT		IN FILE	DOCUMENT	IN FILE
	Award		28.	
1.	Contract		29.	
2.	Executed Modifications		30.	
3.			31.	
4.			32.	
5.			33.	
6.			34.	
7.			35.	
8.			36.	
9.			37.	
10.			38.	
11.			39.	
12.			40.	
13.			41.	
14.			42.	
15.			43.	
16.			44.	
17.			45.	
18.			46.	
19.			47.	
20.			48.	
21.			49.	
22.			50.	
23.			51.	
24.			52.	
25.			53.	
26.			54.	
27.			55.	



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Checklist for File Content

See FAR Subpart 4.803

Phase V

revised: 5/2005

Place document in file. If document is required, place an "X" in the "IN FILE" column, or use folder identifier if there is more than one folder.

DOCUMENT		IN FILE	DOCUMENT	IN FILE
	Award Documentation		27.	
1.	Successful Offeror, Reqs and Certs FAR 15.504		28.	
2.	Contract Reviews, Comments Approvals DR 5000-4		29.	
3.	COR APPOINTMENT LETTER cordesig.doc		30.	
4.	Post-Award Synopsis/Press Release, Congressional Notification FAR 5.301; AGAR 405.303; PPD PM 5-01		31.	
5.	FPDS-NG Report FAR 4.602		32.	
6.	Parties Excluded from Procurement Programs FAR 9.405; AGAR 409.405		33.	
7.	Contract cvrltr.doc		34.	
8.	Memoranda for Record		35.	
9.	Correspondence		36.	
10.			37.	
11.			38.	
12.			39.	
13.			40.	
14.			41.	
15.			42.	
16.			43.	
17.			44.	
18.			45.	
19.			46.	
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21.			48.	
22.			49.	
23.			50.	
24.			51.	
25.			52.	
26.			53.	



USDA, REE, ARS



Checklist for File Content

See FAR Subpart 4.803

Phase VI

revised: 5/2005

Place document in file. If document is required, place an "X" in the "IN FILE" column, or use folder identifier if there is more than one folder.

DOCUMENT		IN FILE	DOCUMENT	IN FILE
	Contract Administration		28.	
1.	Delegations FAR 42.2; AGAR 442.2; delauth.doc		29.	
2.	Government Surveillance Plan & Reports/Quality Assurance Plans FAR 37.602-2		30.	
3.	Post Award Conference Report FAR 42.503; AGAR 415.570		31.	
4.	Technical Direction		32.	
5.	Subcontract Consent FAR 44.201		33.	
6.	Subcontracting Reports FAR 19.704		34.	
7.	General Correspondence		35.	
8.	Memoranda for Record		36.	
9.	Audit Reports FAR 42.1; AGAR 442.102		37.	
10.	Inspection/Acceptance Documentation FAR 46.5-6		38.	
11.	Purchasing Systems Reviews FAR 44.301		39.	
12.	Yearly Past Performance Assessment FAR 42.15; AGAR 442.1502		40.	
13.	Authorization to use Government Supply Sources FAR 51.102		41.	
14.	Suspension of Work/Stop Work Orders/Delays/Cure Notices FAR 42.13		42.	
15.	GFE/GFP Inventories FAR 45.508-1, 45.505, 45.615; AGAR 445.608		43.	
16.	Progress Reports		44.	
17.	Progress Meeting Notes		45.	
18.	Completion Data Monitoring		46.	
19.	Engineering Change Proposal FAR 48		47.	
20.	Rejected Engineering Change Proposal FAR 48.105		48.	
21.	Claims FAR 33.2; AGAR 433.2		49.	
22.	Royalty, Invention, Copyright Reports FAR 27.2 – 27.4		50.	
23.	Waivers from Contractual Requirements/Disapproval of Waiver Requests		51.	
24.	Freedom of Information Act (FOIA) Requests FAR 24.2		52.	
25.	Post-Award Protests FAR 33.103, 19.302, 19.305, 33.104		53.	
26.			54.	
27.			55.	



USDA, REE, ARS



Checklist for File Content

See FAR Subpart 4.803

Phase VII

revised: 5/2005

Place document in file. If document is required, place an "X" in the "IN FILE" column, or use folder identifier if there is more than one folder.

DOCUMENT		IN FILE	DOCUMENT	IN FILE
	Contract Administration Modifications/Task Orders		28.	
1.	Modification Log Summary Sheet followed by Modification (Use Individual Sheet for each Modification)		29.	
2.	Log Sheet for Task Orders (Task/Deliver Orders, including Supporting Documentation and any details located within this Checklist may be located in stand alone files)		30.	
3.			31.	
4.			32.	
5.			33.	
6.			34.	
7.			35.	
8.			36.	
9.			37.	
10.			38.	
11.			39.	
12.			40.	
13.			41.	
14.			42.	
15.			43.	
16.			44.	
17.			45.	
18.			46.	
19.			47.	
20.			48.	
21.			49.	
22.			50.	
23.			51.	
24.			52.	
25.			53.	
26.			54.	
27.			55.	



USDA, REE, ARS



Checklist for File Content

See FAR Subpart 4.803

Phase VIII

revised: 5/2005

Place document in file. If document is required, place an "X" in the "IN FILE" column, or use folder identifier if there is more than one folder.

DOCUMENT		IN FILE	DOCUMENT	IN FILE
	Contract Administration Invoices		28.	
1.	Public Voucher/Progress Payments/Invoices FAR 32		29.	
2.	Memoranda for Record		30.	
3.			31.	
4.			32.	
5.			33.	
6.			34.	
7.			35.	
8.			36.	
9.			37.	
10.			38.	
11.			39.	
12.			40.	
13.			41.	
14.			42.	
15.			43.	
16.			44.	
17.			45.	
18.			46.	
19.			47.	
20.			48.	
21.			49.	
22.			50.	
23.			51.	
24.			52.	
25.			53.	
26.			54.	
27.			55.	



USDA, REE, ARS



Checklist for File Content

See FAR Subpart 4.803

Use for Each Modification

revised: 5/2005

Place document in file. If document is required, place an "X" in the "IN FILE" column, or use folder identifier if there is more than one folder.

DOCUMENT		IN FILE	DOCUMENT		IN FILE
	Modification Documentation: # _____				
1.	Initial Correspondence				
	Purchase Request AD-700				
	Correspondence				
	Request for Information				
	Contractor's Proposal Modification				
	Evaluation of Modification (Technical and Cost/Price)				
	Other Documentation				
2.	Modification Status				
	MOD # cvrltr.doc				
	Purpose				
	Date				
	Amount (+) or (-)				
	Period of Performance Extension From: _____ To: _____				
3.	Additional Documentation				
	Termination Settlement Report FAR 49				
	Assignment of Claims FAR 32.8; AGAR 432.8				
	Novation Agreement FAR 42.12				
	Wage Determination Revisions FAR 22.404-6; AGAR 422.404-6				
	D&F Exercise of Options FAR 17.207(b)-(f); dfopt.doc				
	Options, Contractor Notification Letter FAR 17.207(a), optnltr.doc				



USDA, REE, ARS



Checklist for File Content

See FAR Subpart 4.803

Phase IX

revised: 5/2005

Place document in file. If document is required, place an "X" in the "IN FILE" column, or use folder identifier if there is more than one folder.

DOCUMENT		IN FILE	DOCUMENT	IN FILE
	Closeout		27.	
1.	Completion Statement FAR 4.804, kcomplete.doc		28.	
2.	Past Performance or Performance Evaluation FAR 42.15, nihpast.doc; corpast.doc		29.	
3.	Warranty Information FAR 46.7, 12.404		30.	
4.	Release of Claims		31.	
5.	Audit Information		32.	
6.	Location Closeout Letter & Response FAR 4.805		33.	
7.	Payment Office Closeout Letter & Response FAR 4.804; finoice.doc		34.	
8.	Disposition of GFE & GFP FAR 45.5, 45.6		35.	
9.	Date Sent to Federal Records Center FAR 4.805		36.	
10.	Other Closeout Documentation		37.	
11.	EPM Closeout Letter & Response Information		38.	
12.	Contractor Closeout Letter & Response Information		39.	
13.	Notification of Building Completion to RPMB and Real Property Office		40.	
14.			41.	
15.			42.	
16.			43.	
17.			44.	
18.			45.	
19.			46.	
20.			47.	
21.			48.	
22.			49.	
23.			50.	
24.			51.	
25.			52.	
26.			53.	



USDA, REE, ARS



Checklist for File Content

See FAR Subpart 4.803

Phase IX

revised: 5/2005

Place document in file. If document is required, place an "X" in the "IN FILE" column, or use folder identifier if there is more than one folder.

DOCUMENT		IN FILE	DOCUMENT	IN FILE
Simplified Acquisitions			10. Software License Agreements FAR 12.212, 27.400; DR 5000-4	
1.	Purchase Request and all Backup Documentation		11. Option Justification FAR 17.205	
2.	Brand Name Justification FAR 6.302-1(c); 11.1		12. D&F: Exercise of Options FAR 17.207(b)-(f), dfopt.doc	
3.	Minimum Publicizing Time Met, 10 days FAR 5.101(a)(2)		13. Options, Contractor Notification Letter FAR 17.207(a), optnltr.doc	
4.	Open Market Synopsis over \$25,000 FedBizOpps FAR 5.101(a)(1)		14. Purchase Order cvrltr.doc , W/ SF-279, 281	
5.	Other Than Small Business Justification: The Contracting Officer, in compliance with FAR 13.105 and 19.502-2 , hereby determines that this requirement cannot be awarded by means of a small business small-purchase set-aside because:		15. Modifications and applicable backup documentation w/SF-279 (Construction >\$500; >\$25,000 all others)	
	Other Required Source of Supply. FAR 8.001, 8.002		16. Davis-Bacon (Construction >\$2,000)	
	Foreign Purchase. FAR 25		17. Payment Bond (Construction \$25,000 - \$100,000)	
	To assure satisfactory operation (warranty) of equipment, repair parts must be obtained from original equipment manufacturer, which is a large business firm.		18. Notice to SBA 8(a) Award and Copy of Award AGAR 22	
	Software is proprietary to original equipment manufacturer, which is a large business firm.		19. Modification Log	
	Procurement history of this requirement and a market search reveal that there is no reasonable expectation that offers will be obtained from two or more responsible small business concerns that are competitive in terms of market price, quality, and delivery.		20. Record of Payments	
	Small business-small purchase set-aside action yielded only one small business quotation, which was not reasonable. Purchase completed on an unrestrictive basis.		21. Acceptance	
6.	The price quoted is fair and reasonable based on the following:		22. Closeout (Use Closeout Checklist)	
	Effective competition from ____ sources was obtained		23.	
	Comparison of proposed price with competitive prices in previous procurements		24.	
	Order # Date Price Paid		25.	
			26.	
			27.	
	Current Price Lists, Schedules (including GSA), Catalogs, Advertisements (Attach copy or cite price lists, schedule number, date, and page)		28.	
	Other (explain)		29.	
7.	Justifications		30.	
8.	Abstract of quotations		31.	
9.	Rationale for Award		32.	
REQUISITION NO./RFQ NO.			AMOUNT	
CONTRACTING OFFICER/TELEPHONE			PURCHASE REQUEST INITIATOR/TELEPHONE	
CONTRACTOR/CONTACT/TELEPHONE			PURCHASE ORDER NO.	

CONTRACT MODIFICATIONS

CONTACT NO. _____

CONTRACTOR NAME _____

MOD NO.	PURPOSE/SUMMARY	DATE	AMOUNT +/-
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TASKS ORDERS

CONTACT NO. _____

CONTRACTOR NAME _____

ORDER NO.	PURPOSE/SUMMARY	DATE	AMOUNT +/-
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Construction RFP Non-Competitive 8(a)



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COR:		Requisitioner:		
Location POC:		Contractor POC:		
Phone:		Phone:		
Email:		Email:		
PRE-AWARD		In-File	AWARD & POST AWARD	In-File
Statement of Work FAR 4.803			Requisition, Allocation of Funds AD-705 (B&F) FAR 4.803	
Government Estimate FAR 36.203			Reps & Certs FAR 4.803	
Procurement Plan FAR 7.1			Contract (w/ FPDS-NG) FAR 4.803	
Action Plan/ Fact Sheet P&P 242.4			Summary of Award Memo FAR 9.105, FAR 36.213-4, CSOP-05-003	
Market Research Memo FAR 10, CSOP-05-003			Notice of Award to Contractor FAR 15.504	
Set-Aside Determination FAR 19.501(d)			OFCCP Notice FAR 22.804	
OSDBU Clearance FAR 19.501(d)			Congressional Notification (>\$1 Million) FAR 5.3, CSOP-02-004	
FedBizOpps Pre-Award Notice (if applicable) FAR 36.213-2, FAR 5.2, CSOP-02-005			FedBizOpps Award Notice (if applicable) FAR 36.213-2, FAR 5.2, CSOP-02-005	
SBA Offering Letter & Response FAR 19.8, AGAR Advisory 21 & 22			COR/EPM Appointment Letter FAR 46.1	
Excluded Parties List, VETS-100, E-Verify FAR 9.105, 22.18			Pre-Construction Conference Documentation FAR 36.212, FDSOP 05-001	
CPARS Documentation - AGAR Advisory 96 (Past Performance / Source Selection Info)			Performance, Payment Bond w/ Acceptable Surety FAR 28.1, 28.2, Treasury Circular 570	
Pre-Proposal Conference Documentation FAR 36.212			Notice to Proceed FAR 36.213-4	
Wage Determination FAR 22.4			SF-1413's Statement of Acknowledgement (Subs) FAR 22.406-5	
Liquidated Damages FAR 11.5, FDSOP-09-001			Insurance Certificate FAR 28.3	
Solicitation (w/ Amendments if Applicable) FAR 4.803			Schedule of Values FAR 36.515	
Contract Review Board CSOP -01-001			DOL Requirements/Checks FAR 22.406-7, CSOP 05-002	
Legal Review (>500K) FAR 4.803, FAR 15.3			Status Meeting Minutes FDSOP-04-0001	
Contractor Proposal FAR 4.803			Inspection Reports FAR 4.803	
Bid Bond Waiver or Bid Bond w/ Acceptable Surety FAR 28.101(c), 28.2, CSOP 06-001, Treasury Circular 570			Request for Information FAR 4.803	
Proposal Evaluation Report FAR 15.3, 15.4			General Correspondence FAR 4.803	
Pre-Negotiation Memo FAR 15.406-3			Modifications w/ Backup Documentation	
Environmental Documentation/Catex (new construction only) P+P 242.4			Payment File w/ Certified Payrolls	
General Correspondence FAR 4.803			Closeout File	
To report an Error or make a Suggestion, please click Here				



Construction RFP Competitive



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COR:		Requisitioner:	
Location POC:		Contractor POC:	
Phone:		Phone:	
Email:		Email:	
PRE-AWARD		In-File	AWARD & POST AWARD
Statement of Work FAR 4.803			Requisition, Allocation of Funds AD-705 (B&F) FAR 4.803
Government Estimate FAR 36.203			Reps & Certs FAR 4.803
Procurement Plan FAR 7.1			Contract (w/ FPDS-NG) FAR 4.803
Action Plan/ Fact Sheet P&P 242.4			Summary of Award Memo FAR 9.105, FAR 36.213-4, CSOP-05-003
Market Research Memo FAR 10, CSOP-05-003			Notice of Award to Contractor FAR 15.504
Set-Aside Determination FAR 19.501(d)			OFCCP Notice FAR 22.804
OSDBU Clearance FAR 19.501(d)			Congressional Notification (>\$1 Million) FAR 5.3, CSOP-02-004
FedBizOpps Pre-Award Notice FAR 36.213-2, FAR 5.2, CSOP-02-005			FedBizOpps Award Notice FAR 36.213-2, FAR 5.2, CSOP-02-005
Pre-Proposal Conference Documentation FAR 36.212			COR/EPM Appointment Letter FAR 46.1
Wage Determination FAR 22.4			Pre-Construction Conference Documentation FAR 36.212, FDSOP 05-001
Liquidated Damages FAR 11.5, FDSOP-09-001			Performance, Payment Bond w/ Acceptable Surety FAR 28.1, 28.2, Treasury Circular 570
Solicitation (w/ Amendments if Applicable) FAR 4.803			Notice to Proceed FAR 36.213-4
Source Selection Plan FAR 15.3			SF-1413's Statement of Acknowledgement (Subs) FAR 22.406-5
Contract Review Board CSOP -01-001			Insurance Certificate FAR 28.3
Legal Review (>500K) FAR 4.803, FAR 15.3			Subcontracting Plan (>650K) (large business only) FAR 19.702 (applied prior to award)
TEP Appointment Letters FAR 4.803, FAR 15.3			ISR + SSR Subcontracting Reports (if applicable) FAR 52-219-9, http://www.eSRS.gov
Contractor Proposals FAR 4.803			Schedule of Values FAR 36.515
Bid Bond Waiver or Bid Bond w/ Acceptable Surety FAR 28.101(c), 28.2, CSOP 06-001, Treasury Circular 570			DOL Requirements/Checks FAR 22.406-7, CSOP 05-002
TEP Initial Evaluation Report w/ Scores FAR 15.3, 15.4			Status Meeting Minutes FDSOP-04-0001
Competitive Range Determination FAR 15.4			Inspection Reports FAR 4.803
Notice to Offerors in/out of Competitive Range FAR 15.5			Request for Information FAR 4.803
Unsuccessful Offers w/Copies of Bid Bonds, Sects. A, B, K FAR 4.803			General Correspondence FAR 4.803
TEP Final Evaluation Report w/ Scores FAR 15.3, 15.4			Modifications w/ Backup Documentation
Excluded Parties List, VETS-100, E-Verify FAR 9.105, 22.18			Payment File w/ Certified Payrolls
CPARS Documentation - AGAR Advisory 96 (Past Performance / Source Selection Info)			Closeout File
Letters to Unsuccessful Offerors FAR 15.5			
Pre-Negotiation Memo FAR 15.406-3			
Environmental Documentation/Catex (new construction only) P+P 242.4			
General Correspondence FAR 4.803			

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PRE-AWARD	In-File	AWARD & POST AWARD	In-File
Statement of Work FAR 4.803		Requisition, Allocation of Funds AD-705 (B&F) FAR 4.803	
Government Estimate FAR 36.203		Reps & Certs FAR 4.803	
Procurement Plan FAR 7.1		Task Order (w/ FPDS-NG) FAR 4.803	
Action Plan/ Fact Sheet P&P 242.4		Summary of Award Memo FAR 9.105, FAR 36.213-4, CSOP-05-003	
Market Research Memo FAR 10, CSOP-05-003		Notice of Award to Contractor FAR 15.504	
Set-Aside Determination FAR 19.501(d)		OFCCP Notice FAR 22.804	
OSDBU Clearance FAR 19.501(d)		Congressional Notification (>\$1 Million) FAR 5.3, CSOP-02-004	
FedBizOpps Pre-Award Notice (if applicable) FAR 36.213-2, FAR 5.2, CSOP-02-005		FedBizOpps Award Notice (if applicable) FAR 36.213-2, FAR 5.2, CSOP-02-005	
SBA Offering Letter & Response (if applicable) FAR 19.8, AGAR Advisory 21 & 22		COR/EPM Appointment Letter FAR 46.1	
Pre-Proposal Conference Documentation FAR 36.212		Pre-Construction Conference Documentation FAR 36.212, FDSOP 05-001	
Wage Determination FAR 22.4		Performance, Payment Bond w/ Acceptable Surety FAR 28.1, 28.2, Treasury Circular 570	
Liquidated Damages FAR 11.5, FDSOP-09-001		Notice to Proceed FAR 36.213-4	
Solicitation (w/ Amendments if Applicable) FAR 4.803		SF-1413's Statement of Acknowledgement (Subs) FAR 22.406-5	
Contract Review Board CSOP -01-001		Insurance Certificate FAR 28.3	
Legal Review (>500K) FAR 4.803, FAR 15.3		Subcontracting Plan (>650K) (large business only) FAR 19.702 (applied prior to award)	
Contractor Proposal FAR 4.803		ISR + SSR Subcontracting Reports (if applicable) FAR 52-219-9, http://www.eSRS.gov	
Bid Bond Waiver or Bid Bond w/ Acceptable Surety FAR 28.101(c), 28.2, CSOP 06-001, Treasury Circular 570		Schedule of Values FAR 36.515	
Proposal Evaluation Report FAR 15.3, 15.4		DOL Requirements/Checks FAR 22.406-7, CSOP 05-002	
Pre-Negotiation Memo FAR 15.406-3		Status Meeting Minutes FDSOP-04-0001	
Environmental Documentation/Catex (new construction only) P+P 242.4		Inspection Reports FAR 4.803	
Justification for Use of Options (if applicable) FAR 17.205		Request for Information FAR 4.803	
General Correspondence FAR 4.803		General Correspondence FAR 4.803	
		Modifications w/ Backup Documentation	
		Payment File w/ Certified Payrolls	
		Closeout File	

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Phone:		Phone:		
Email:		Email:		
PRE-AWARD		In-File	AWARD & POST AWARD	In-File
Statement of Work FAR 4.803			Requisition, Allocation of Funds AD-705 (B&F) FAR 4.803	
Government Estimate FAR 36.203			Reps & Certs FAR 4.803	
Procurement Plan FAR 7.1			Contract (w/ FPDS-NG) FAR 4.803	
Action Plan/ Fact Sheet P&P 242.4			Summary of Award Memo FAR 9.105, FAR 36.213-4, CSOP-05-003	
Market Research Memo FAR 10, CSOP-05-003			Notice of Award to Contractor FAR 15.504	
Set-Aside Determination FAR 19.501(d)			OFCCP Notice FAR 22.804	
OSDBU Clearance FAR 19.501(d)			Congressional Notification (>\$1 Million) FAR 5.3, CSOP-02-004	
FedBizOpps Pre-Award Notice FAR 36.213-2, FAR 5.2, CSOP-02-005			FedBizOpps Award Notice FAR 36.213-2, FAR 5.2, CSOP-02-005	
Pre-Bid Conference Documentation FAR 36.212			COR/EPM Appointment Letter FAR 46.1	
Wage Determination FAR 22.4			Pre-Construction Conference Documentation FAR 36.212, FDSOP 05-001	
Liquidated Damages FAR 11.5, FDSOP-09-001			Performance, Payment Bond w/ Acceptable Surety FAR 28.1, 28.2, Treasury Circular 570	
Solicitation (w/ Amendments if Applicable) FAR 4.803			Notice to Proceed FAR 36.213-4	
Contract Review Board CSOP -01-001			SF-1413's Statement of Acknowledgement (Subs) FAR 22.406-5	
Legal Review (>500K) FAR 4.803, FAR 15.3			Insurance Certificate FAR 28.3	
Abstract to Offerers FAR 14.403			Subcontracting Plan (>650K) (large business only) FAR 19.702 (applied prior to award)	
Contractor Bids FAR 4.803			ISR + SSR Subcontracting Reports (if applicable) FAR 52-219-9, http://www.eSRS.gov	
Bid Bond Waiver or Bid Bond w/ Acceptable Surety FAR 28.101(c), 28.2, CSOP 06-001, Treasury Circular 570			Schedule of Values FAR 36.515	
Unsuccessful Offers w/Copies of Bid Bonds, Sects. A, B, K FAR 4.803			DOL Requirements/Checks FAR 22.406-7, CSOP 05-002	
Letters to Unsuccessful Offerors FAR 15.5			Status Meeting Minutes FDSOP-04-0001	
Excluded Parties List, VETS-100, E-Verify FAR 9.105, 22.18			Inspection Reports FAR 4.803	
CPARS Documentation - AGAR Advisory 96 (Past Performance / Source Selection Info)			Request for Information FAR 4.803	
Environmental Documentation/Catex (new construction only) P+P 242.4			General Correspondence FAR 4.803	
General Correspondence FAR 4.803			Modifications w/ Backup Documentation	
			Payment File w/ Certified Payrolls	
			Closeout File	

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A&E Indefinite Quantity Contract



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Phone:		Phone:	
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PRE-AWARD	In-File	AWARD & POST AWARD	In-File
Project Requirements Documentation/Evaluation Criteria FAR 36.605		Requisition, Allocation of Funds AD-705 (B&F) FAR 4.803	
Procurement Plan FAR 7.1		Reps & Certs FAR 4.803	
Action Plan/ Fact Sheet P&P 242.4		Contract (w/ FPDS-NG) FAR 4.803	
Market Research Memo FAR 10, CSOP-05-003		Summary of Award Memo FAR 9.105, FAR 36.213-4, CSOP-05-003	
Set-Aside Determination FAR 19.501(d)		Notice of Award to Contractor FAR 15.504	
OSDBU Clearance FAR 19.501(d)		OFCCP Notice FAR 22.804	
Solicitation (w/ Amendments if Applicable) FAR 4.803		Congressional Notification (>\$1 Million) FAR 5.3, CSOP-02-004	
Source Selection Plan FAR 15.3		FedBizOpps Award Notice FAR 36.213-2, FAR 5.2, CSOP-02-005	
Contract Review Board CSOP -01-001		COR/EPM Appointment Letter FAR 46.1	
Legal Review (>500K) FAR 4.803, FAR 15.3		Subcontracting Plan (>650K) (large business only) FAR 19.702 (applied prior to award)	
FedBizOpps Pre-Award Notice FAR 36.213-2, FAR 5.2, CSOP-02-005		ISR + SSR Subcontracting Reports (if applicable) FAR 52-219-9, http://www.eSRS.gov	
TEP Appointment Letters FAR 4.803, FAR 15.3		General Correspondence FAR 4.803	
Contractor Proposals (SF-330's) FAR 4.803		Modifications w/ Backup Documentation	
TEP Initial Evaluation Report w/ Scores FAR 15.3, 15.4		Closeout File	
Short List Recommendation Letter to Selection Official & Approval FAR 36.602-3			
Letters to Initial Unsuccessful Firms FAR 36.607			
Invitation Letters to Short List Firms FAR 36.607			
SF-330 & Presentation Material of Short List Firms CSOP-05-001			
TEP Final Evaluation Report w/ Scores FAR 15.3, 15.4			
Recommendation Letter to Selection Official FAR 36.602-4			
Letters to Unsuccessful Short Listed Firms FAR 36.607			
Excluded Parties List, VETS-100, E-Verify FAR 9.105, 22.18			
Pre-Negotiation Memo FAR 15.406-3			
Justification for Use of Options FAR 17.205			
General Correspondence FAR 4.803			

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PRE-AWARD		In-File	AWARD & POST AWARD	In-File
Project Requirements Documentation/Evaluation Criteria FAR 36.605			Requisition, Allocation of Funds AD-705 (B&F) FAR 4.803	
Procurement Plan FAR 7.1			Reps & Certs FAR 4.803	
Action Plan/ Fact Sheet P&P 242.4			Contract (w/ FPDS-NG) FAR 4.803	
Market Research Memo FAR 10, CSOP-05-003			Summary of Award Memo FAR 9.105, FAR 36.213-4, CSOP-05-003	
Set-Aside Determination FAR 19.501(d)			Notice of Award to Contractor FAR 15.504	
OSDBU Clearance FAR 19.501(d)			OFCCP Notice FAR 22.804	
Solicitation (w/ Amendments if Applicable) FAR 4.803			Congressional Notification (>\$1 Million) FAR 5.3, CSOP-02-004	
Source Selection Plan FAR 15.3			FedBizOpps Award Notice FAR 36.213-2, FAR 5.2, CSOP-02-005	
Contract Review Board CSOP -01-001			COR/EPM Appointment Letter FAR 46.1	
Legal Review (>500K) FAR 4.803, FAR 15.3			Post Award Conference Documentation	
FedBizOpps Pre-Award Notice FAR 36.213-2, FAR 5.2, CSOP-02-005			Design Kick Off Meeting	
TEP Appointment Letters FAR 4.803, FAR 15.3			Deliverables	
Contractor Proposals (SF-330's) FAR 4.803			Environmental Documentation/Catex (new construction only) P&P 242.4	
TEP Initial Evaluation Report w/ Scores FAR 15.3, 15.4			Design Review Board FDSOP-08-001	
Short List Recommendation Letter to Selection Official & Approval FAR 36.602-3			Subcontracting Plan (>650K) (large business only) FAR 19.702 (applied prior to award)	
Letters to Initial Unsuccessful Firms FAR 36.607			ISR + SSR Subcontracting Reports (if applicable) FAR 52-219-9, http://www.eSRS.gov	
Invitation Letters to Short List Firms FAR 36.607			General Correspondence FAR 4.803	
SF-330 & Presentation Material of Short List Firms CSOP-05-001			Modifications w/ Backup Documentation	
TEP Final Evaluation Report w/ Scores FAR 15.3, 15.4			Payment File	
Recommendation Letter to Selection Official FAR 36.602-4			Closeout File	
Letters to Unsuccessful Short Listed Firms FAR 36.607				
Excluded Parties List, VETS-100, E-Verify FAR 9.105, 22.18				
Pre-Negotiation Memo FAR 15.406-3				
Justification for Use of Options (if applicable) FAR 17.205				
General Correspondence FAR 4.803				

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Phone:		Phone:	
Email:		Email:	
PRE-AWARD	In-File	AWARD & POST AWARD	In-File
Project Requirements Documentation/Evaluation Criteria FAR 36.605		Requisition, Allocation of Funds AD-705 (B&F) FAR 4.803	
Procurement Plan FAR 7.1		Task Order (w/ FPDS-NG) FAR 4.803	
Action Plan/ Fact Sheet P&P 242.4		Summary of Award Memo FAR 9.105, FAR 36.213-4, CSOP-05-003	
Government Estimate FAR 36.605		Notice of Award to Contractor FAR 15.504	
Market Research Memo FAR 10, CSOP-05-003		OFCCP Notice FAR 22.804	
Set-Aside Determination FAR 19.501(d)		Congressional Notification (>\$1 Million) FAR 5.3, CSOP-02-004	
OSDBU Clearance FAR 19.501(d)		FedBizOpps Award Notice FAR 36.213-2, FAR 5.2, CSOP-02-005	
A-E Selection Memo CSOP-03-001		COR/EPM Appointment Letter FAR 46.1	
Solicitation (w/ Amendments if Applicable) FAR 4.803		Post Award Conference Documentation	
Source Selection Plan FAR 15.3		Design Kick Off Meeting	
Contract Review Board CSOP -01-001		Deliverables	
FedBizOpps Pre-Award Notice FAR 36.213-2, FAR 5.2, CSOP-02-005		Environmental Documentation/Catex (new construction only) P&P 242.4	
Contractor Proposal FAR 4.803		Design Review Board FDSOP-08-001	
Pre-Negotiation Memo FAR 15.406-3		General Correspondence FAR 4.803	
Justification for Use of Options (if applicable) FAR 17.205		Modifications w/ Backup Documentation	
General Correspondence FAR 4.803		Payment File	
		Closeout File	

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Construction/A&E Modification



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COR:		Requisitioner:	
Location POC:		Contractor POC:	
Phone:		Phone:	
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MODIFICATIONS	In-File	ADDITIONAL INFO.	In-File
Request for Information FAR 4.803		Termination Settlement Report FAR 49	
Government Estimate FAR 36.203		Assignment of Claims FAR 32.8, AGAR 432.8	
Request for Proposal FAR 4.803		Novation Agreement FAR 42.12	
Change Order Proposal Evaluation FAR 4.803		Wage Determination Revisions FAR 22.404-6, AGAR 422.404-6	
Pre-Negotiation Memo FAR 15.406-3		Exercise of Options FAR 17.207(b)-(f)	
Justification for Use of Options (if applicable) FAR 17.205		Options, Contractor Notification Letter FAR 17.207(a)	
Justification for Use of Prior Year Funds (if applicable) P&P 323.8			
Requisition FAR 4.803			
Modification (SF-30 w/ FPDS-NG) FAR 4.803			
Modification Letter to Contractor FAR 43, 4.803			
Memo to File FAR 43, 4.803, CSOP-05-003			
FedBizOpps Modification Notice (if applicable) FAR 36.213-2, FAR 5.2, CSOP-02-005			
General Correspondence FAR 4.803			

Mod. No.	Summary of Mod.	Date	Amount of Mod.	Total Amount	Revised Completion Date

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CLOSEOUT	In-File	In-File	In-File
Release of Claims CSOP-02-003			
As Built Drawings CSOP-02-003			
O&M Manuals CSOP-02-003			
Warranty Information FAR 46.7, 12.404			
Certificate of Inspections CSOP-02-003			
Certificate of Substantial Completion CSOP-02-003			
Closeout Statement FAR 4.804, CSOP-02-003			
OBL/OBLH (if applicable)			
Past Performance Evaluation (CPARS) AGAR Advisory 96 FAR 42.1			
Location Closeout Letter & Response			
Contractor Closeout Letter & Response			
EPM Closeout Letter & Response			
60 Day Closeout Memo (if applicable)			
General Correspondence FAR 4.803			

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