

Limited Tendering (LT) Checklist – Client Driven Pricing (All Values over \$25K)

Requisition: Choose an item.

Bid Call No.: Choose an item.

PO Number: Choose an item.

Total Procurement Estimate (including all renewal options): Choose an item.

Buyer: Choose an item.

PAA: Choose an item.

Agreement Required Choose an item. If Yes, Agreement Type: Choose an item.

Review	eContracts
<div>1. Buyer<div><input type="checkbox"/> Generate Bid Call Number </div><div><input type="checkbox"/> Create Electronic Case File </div><div><input type="checkbox"/> Create Checklist in Case File <div><input type="checkbox"/> Transit 180 Notice <input type="checkbox"/> N/A</div><div><input type="checkbox"/> Create Procurement Status Log </div></div><div><input type="checkbox"/> Supervisor to approve before PA/Delegate approval </div><div><input type="checkbox"/> Obtain PA/Delegate’s approval </div><div><input type="checkbox"/> Verify Recommended Award Bidder has an Account in Bids & Tenders, if NO: <div><input type="checkbox"/> PAA to contact Bidder to create an Account in bids&tenders </div></div><div><input type="checkbox"/> Complete the Build Phase </div><div><input type="checkbox"/> Add Supplier in Contract Phase </div><div><input type="checkbox"/> Check if Successful Bidder(s) is a Diverse Supplier </div><div><input type="checkbox"/> Write Up Requisition </div><div><input type="checkbox"/> Upload Begin Procurement Report (from Council Agenda) <input type="checkbox"/> N/A</div><div><input type="checkbox"/> Upload Council Correspondence Email <input type="checkbox"/> N/A</div></div>	<div>6. Purchasing Administrative Assistant<div><input type="checkbox"/> Manage Team Members </div><div><input type="checkbox"/> Complete Dates and Amounts </div><div><input type="checkbox"/> Complete Document section <div><input type="checkbox"/> Upload WSIB – WSIB category <input type="checkbox"/> N/A</div><div><input type="checkbox"/> Upload approved COI & template – Insurance category <input type="checkbox"/> N/A</div><div><input type="checkbox"/> Upload Approved LT form – Other category</div><div><input type="checkbox"/> Upload Executed Agreement – Supplier Doc category <input type="checkbox"/> N/A</div><div><input type="checkbox"/> Upload Corporate Status Certificate – Supplier Doc category <input type="checkbox"/> N/A</div><div><input type="checkbox"/> Upload Bonds and/or Security – Bonds and Security category <input type="checkbox"/> N/A</div><div><input type="checkbox"/> Upload Begin Procurement Report <input type="checkbox"/> N/A (from Council Agenda) – Other category <input type="checkbox"/> N/A</div><div><input type="checkbox"/> Upload Council Correspondence Email – Other category <input type="checkbox"/> N/A</div></div></div> <div><input type="checkbox"/> Register Vendor to WSIB Contractors List <input type="checkbox"/> N/A</div>
<div>2. Purchasing Administrative Assistant<div><input type="checkbox"/> Verify Recommended Award Bidder has an Account in PeopleSoft </div><div><input type="checkbox"/> If new Supplier, email the Direct Deposit Form and advise to forward form to accountspayable@brampton.ca <input type="checkbox"/> N/A</div><div><input type="checkbox"/> If Direct Deposit Form was sent to Supplier, cc accountspayable@brampton.ca on Vendor Maint. Email <input type="checkbox"/> N/A</div><div><input type="checkbox"/> Verify Insurance requirements with Risk </div><div><input type="checkbox"/> Create COI Template <input type="checkbox"/> N/A</div><div><input type="checkbox"/> Obtain Risk Management Approval on COI <input type="checkbox"/> N/A</div></div>	
Execution (If Applicable) <input type="checkbox"/> N/A	Purchase Order
<div>3. Purchasing Administrative Assistant<div><input type="checkbox"/> Draft Execution Memo </div><div><input type="checkbox"/> Prepare Execution File Folder with all Requirements </div></div>	<div>7. Purchasing Administrative Assistant<div><input type="checkbox"/> Draft Purchase Order </div><div><input type="checkbox"/> Create Purchasing General Information </div><div><input type="checkbox"/> Close Requisition </div></div>
<div>4. Buyer<div><input type="checkbox"/> Review File and Sign Memo</div></div>	<div>8. Buyer<div><input type="checkbox"/> Review and Approve Purchase Order </div><div><input type="checkbox"/> Review and Approve Purchasing General Information Panel </div><div><input type="checkbox"/> PO Dispatch <div><input type="checkbox"/> Buyer up to <\$250K</div><div><input type="checkbox"/> Senior Buyer <\$500K</div><div><input type="checkbox"/> Purchasing Supervisor <\$1M</div><div><input type="checkbox"/> Deputy Purchasing Agent \$1M</div></div></div>

Purchasing General Information Panel										
PROCUREMENT PROCESS TYPE										
Process Type: Choose an item.			Negotiable: Y <input type="checkbox"/>		Contract Type: Choose an item.			Architectural or Engineering Services: Y <input type="checkbox"/>		Consultant: Y <input type="checkbox"/>
PROCESS										
Start Date: Click or tap to enter a date.				# of Document Takers:		# of Bids Received:		# of Disqualified Bids:		
Target: Choose an item.		Construction: Y <input type="checkbox"/>		Council Date: Click or tap to enter a date.			Limited Tendering (Sched C): Choose an item.			
PCard: Y <input type="checkbox"/>		Department Estimate: \$			Irregular Results: Choose an item.			Diverse Supplier: Y <input type="checkbox"/>		
CONTRACT										
Funds Approved on PAR or Council not found on PO (s): \$		# of Optional Approval Approved Renewals:		Length of Renewal Period: Choose an item. Choose an item.			Destruction Date: Click or tap to enter a date.			
WARD										
1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>	7 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>	10 <input type="checkbox"/>	All <input type="checkbox"/>