



REQUISITION SUBMITTAL CHECKLIST



To the extent that they apply to the product or service requested, the following items are required in order for the requisition (RQS) to be **approved** by Procurement:

_____ **CERTIFICATES OF INSURANCE AND ENDORSEMENTS** – Proof of insurance is required for all vendors performing services if their work requires it. See the Understanding Vendor Insurance Requirements packet at the following link:

[Microsoft Word - Request to Waive or alter insurance requirements 6.26.23](#)

_____ **CEO/HUMAN RESOURCES APPROVAL** – This is required for all independent contractors and information technology related services (programmers, project managers, etc.). Complete a Checklist for Determination of Worker Status form and forward it to your agency Human Resources staff. The signed form is then uploaded to the RQS in VCFMS. The RQS must be routed to County HR in VCFMS. The form is available at the following link.

<https://www.ventura.org/general-services-agency/wp-content/uploads/sites/19/2023/09/HR-Clearance-Form-Sole-Prop-NEW-internal.pdf>

_____ **INFORMATION TECHNOLOGY SERVICES APPROVAL** – Approval from County ITS is required for purchases of non-standard computer hardware, software, software maintenance, and programming services. The first link provides step-by-step instructions for routing the RQS to ITS. The second link is a listing of standard products.

http://myvcweb/images/GSA/pdf/General_Information/ITSD_PURCHASE_APPROVAL_PROC_ESS_INSTRUCTIONS.pdf

<http://vcportal.ventura.org/VCWEB/policies/docs/IT%20Approval%20Standards%20-%202014.pdf>

_____ **ATTACHMENTS** – Upload – quotes, invoices, agreements, scope of work, terms and conditions, etc., to the header of the RQS in VCFMS.

_____ **SPECIFICATIONS** – Provide a concise, clear, and detailed description of the product and/or services being requested. Additionally, the RQS is reviewed by the Buyer for the items described herein. Providing this information as early as possible will reduce cycle time.

_____ **BIDDING REQUIREMENTS** – Procurement policy requires that three competitive quotes be obtained for commodities (including maintenance/repair) between \$10,000 and \$200,000. Services between \$10,000 and \$200,000 are to be competed at Buyers discretion. Please note: Quotes obtained without Procurement assistance may not meet County requirements and may not be considered. See Procurement Guide for more details. Bid Thresholds are available here:

<https://s44345.pcdn.co/general-services-agency/wp-content/uploads/sites/19/2023/10/Procurement-Thresholds-Guide.pdf>

_____ **BOARD OF SUPERVISORS APPROVAL** – Required for services over \$200,000.

_____ **REQUEST TO WAIVE BIDDING REQUIREMENTS** – Complete a Request to Waive Bidding Requirements form when requesting an exemption to the above bidding requirements. Request form can be found here: [Microsoft Word - Request to Waive Bidding Requirements -revised 2013 1.doc \(ventura.org\)](#)

_____ **COUNTY COUNSEL APPROVAL** – Required when requesting outside legal services. Contact your County Counsel to provide you with written approval. This will need to be attached to the header of the RQS in VCFMS.

_____ **CONTRACT** – A formal contract is recommended for services over \$25,000. Procurement uses a standard form and will prepare a contract or review the vendor's agreement.