

Procurement Package Checklist

Purpose: To ensure standardization of the submission process for equipment and supply projects the below check list will accompany the request for procurement. Please ensure all VHA policies and directives are being applied to this acquisition request.

ALL DOCUMENTS ARE TO BE PROVIDED ELECTRONICALLY.

DATE: _____ **2237#** _____

COR NAME (if applicable—[VHAPM Part 801.603-70 COR SOP](#)): _____

COR PHONE # _____

COR TRAINING COMPLETE _____ **Link to:** [COR Nomination Memo](#)

	Enclosed	Not Required
<p>1. Provide users of supply/service by department, name and phone number. List must include a person and/or user group responsible for quality requirements of the contract.</p> <p>List the departments who will use the supply or service being requested. Include contact information for each department.</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>2. 2237 FUNDED <input type="checkbox"/></p> <p>2237 #:</p> <p>The project needs to be funded before moving forward. If it is unfunded, please speak to the Fiscal Department.</p> <p>For more information on procurement package submittal, please visit the VHA Procurement Manual Volume Three Chapter II – Customer Reference Guide</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>3. IT Tracking Number: Provide IT tracking number if this is an IT requirement. Contact your local ISO to determine if your requirement requires a tracking number.</p> <p>Contact the System Administrator (IRM) and you're COR to determine if your request is an IT requirement. If you do have an IT requirement you must submit the required attachments such as statement of work, independent government estimate, copy of 2237, etc. in to the below listed portal. Tracking is on "VA IT Acquisition Request System" (ITARS): http://vaww4.va.gov/itt/default.asp</p> <p>If your request has not been entered into the IT System's portal, it will be returned to the IT Department until it has been input into the new portal.</p>	<input type="checkbox"/>	<input type="checkbox"/>

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<p>4. Is this a recurring requirement? If it is provide the following:</p> <p>Prior Contracting Officer: _____</p> <p>Prior year IFCAP Purchase Order number: _____</p> <p>Prior year contract number (current or expired): _____</p> <p>The requested information can be found in the IFCAP database. For help accessing the IFCAP database, please contact IRM support.</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>5. List any VA Directives or policies that the supply or equipment being purchased must comply with:</p> <p>A reference of most Directives and policies can be found here: http://vaww.va.gov/vapubs/index.cfm</p> <p>Contact your COR and/or subject matter experts to learn more about VA Directives and policies that the item you are purchasing must comply with.</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>6. Veterans First Contracting Program: When determining source of supply, reference FAR 8.002 and VAAR 808.002 in Class Deviation—Implementation of the Veterans First Contracting Program. Please ensure the “Rule of Two” is adhered to. If you have questions, consult with your Contracting Officer.</p> <p>The order of sources for competitive actions is as follows:</p> <ul style="list-style-type: none"> • Service-Disabled Veteran Owned Small Business (SDVOSB) • Veteran Owned Small Business (VOSB) • GSA Contracts • Contract Vehicles such as IDIQ’s and BPA’s 	<input type="checkbox"/>	<input type="checkbox"/>

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<p>7. Sole Source:</p> <p>If a sole source is requested, a justification and approval (J&A) document is required. The justification document is a collaborative effort between the requiring activity and the contracting office and must be initiated by the requirements office by filling out the form and submitting it to the contracting office with the original procurement package. Please contact your NCO to determine which justification template in Table 3.1.6 of VHAPM Part 806.3 Other Than Full and Open Competition SOP is appropriate for your sole source request.</p> <p>Note: If the item you are purchasing must be provided by only one company- a specific item only offered by one supplier for example - you must provide convincing and thorough evidence that only that one company can meet the needs of the project. This justification should demonstrate that the specific equipment or product you are requesting is not only a preference but that it is also a necessity.</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>8. Federal Supply Schedule (FSS):</p> <p>Is the item(s) on GSA/FSS? If item(s) is/are on FSS, were multiple FSS vendors considered? If yes, please provide documentation on why the selected vendor is the best value.</p> <p>GSA Contract Number: _____</p> <p>Search the FSS website to determine if the item is available on it. If it is, write the GSA/FSS Contract Number in the space provided above. Show documentation for the vendor with the best value. If the item is part of a Bulk Purchasing Agreement (BPA) please write any details of that agreement in this space.</p>	<input type="checkbox"/>	<input type="checkbox"/>

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<p>9. Functional/Performance/Specification/Salient Characteristics: (Word Doc) Describe equipment/supply use. If brand name items are requested, it must be supported by a sole source justification.</p> <p>In this word document describe the equipment and/or supplies you will need in detail. Focus on the functionality of the items you would like to purchase and the end results they will help you accomplish. Include enough information so that someone with no knowledge of the project will understand what will be needed. In general, one or two sentences will not suffice, more detail is needed.</p> <p>Sample Specification language, Performance Work Statements (PWS), and Statement of Works (SOW) are available in the: <u>VHA Acquisition Business Intelligence Tool (VABIT)</u>.</p> <p>Applicable Drawings/Schematics: Provide any applicable drawings, maps, schematics in electronic format (if required) – example furniture or kitchen equipment purchases where space is a critical element for dimension or installation location requirements.</p> <p>In order to ensure that your product fits in its desired location, provide detailed drawings, maps or schematics of the area it will eventually reside in. The more detailed your drawings the less likely the error in size/fit of your requested item. This step is especially important for furniture and equipment that will take up a lot of a room's space.</p>	<input type="checkbox"/>	<input type="checkbox"/>

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<p>10. Delivery/performance information, date item(s) required. A reasonable delivery date must be considered.</p> <p>Write the date you would like the item to be in your hands and ready to be used. Remember, there is a built in minimum timeline due to the various mandated steps in the contracting process. The number of days listed below represents the minimum number of days you can expect the CO to award a contract or issue a TO/DO after a completed and executable procurement package has been received by the CO. The minimum timelines after an executable package is received by the CO are listed below. Note these timelines do not account for the time from receipt of the package until found executable by the CO or any clarifications the CO must receive from the vendor.</p> <p>Consider the below time ranges as a guideline:</p> <ul style="list-style-type: none"> a. Simplified Purchase <\$25,000 - 40 days b. Competitive MAS-DO/TO <\$5Million - 39 days c. Non- Competitive <\$5Million - 42 days d. SEWP-DO - <\$5Million - 25 days e. Competitive - MAS-DO/TO >\$5Million - 143 days f. Non-Competitive - MAS-DO/TO >\$5Million - 142 days <p>After writing your delivery date, please also include detailed delivery instructions including the specific location you want the item delivered to, any necessary special delivery vehicles or requests, and any other information that could help ensure a smooth delivery.</p>	<input type="checkbox"/>	<input type="checkbox"/>

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<p>11. Market Research: Provide market research documentation to support procurement requests, including sole source requirements. If available, electronically attach any vendor quotes.</p> <p>Please use the Market Research Form template provided by Contracting.</p> <p>The first step in market research is to determine if your requested item must be purchased from a mandated source (i.e., Ability One or FPI). Check with the COR and/or CO to determine if your requested item is part of any Prime Vendor, National Committed Use Contracts, Mandatory Suppliers List, Bulk Purchasing Agreement, VHA Directive, Federal Supply Schedule (FSS) or other mandated purchasing list. If it is, include this information in the Market Research Worksheet with a copy of the mandating source. If not, then conduct your own Market Research to help determine the best source for your item.</p> <p>Market Research sources include: Manufacturer and Dealer catalogs, product brochures, trade journals, FSS, government economic data, and prospective vendors.</p> <p>If you are requesting that the item is purchased from only one specific company or vendor you must demonstrate detailed need for that one specific item and prove that it is unavailable through other companies/vendors.</p>	<input type="checkbox"/>	<input type="checkbox"/>

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<p>12. Independent Government Estimate (IGCE):</p> <p>An IGCE is normally not required for equipment or supply orders. However, the CO may require an IGCE if there are no other means to determine the offeror's price fair and reasonable.</p> <p>Information on how to develop an IGCE can be found here: VHA Procurement Manual Volume Three Chapter II Appendix B - IGCE Guide</p> <p>The IGCE serves as an important basis for determining the reasonableness of an offeror's proposed costs and understanding of a given solicitation. The IGCE is considered source selection information, and it should not be shared with anyone outside the VA Acquisition Team, absent the express consent of the CO. Please provide the methodology and data used to develop the estimate. A sample template is located in in Customer Reference Guide Chapter 10 Independence Government Estimate.</p> <p>If requirement contains multiple line items, the IGCE should be broken down by line item.</p> <p>In general, the most reliable estimates:</p> <ul style="list-style-type: none"> • Are made by someone who knows the product • Relies on the statement or scope of work documents • Considers last price paid, general market price changes, current commercial • Market price, quantity price breaks and possible substitutes • Applies market research above to the actual product procurement at hand • Uses quantitative techniques to determine the cost and does not rely on professional judgment • Researches historical acquisition trends 	<input type="checkbox"/>	<input type="checkbox"/>

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<p>13. Security: Identification of a position's risk level as it relates to the efficiency and integrity of the Federal service; and identification of a position's sensitivity level as it relates to a position with national security interests in accordance with VA Directive 0710.</p> <p style="margin-left: 40px;">YES NO () () Will contractor work on VA property to install equipment? () () to a potentially sensitive area?</p> <ul style="list-style-type: none"> Completed Security Assessment Form [Position Designated Automated Tool (PDAT)]. If applicable, the automated tool can be found here: OPM Position Designation Automated Tool . <p>ISO certification that requirement does or does not require applicable security clauses in accordance with VA Directive 6500 and 6500.6 which applies to all VA contracts in which VA sensitive information is stored, generated, transmitted or exchanged by a VA contractor, subcontractor or third-party, or on behalf of any of these entities regardless of format and whether it resides on a VA or a non-VA system, for the contractor, subcontractor, or third party to perform their contractual obligations to VA for the acquisition of goods or services where they stand in lieu of VA and act on VA's behalf.</p> <p>The Checklist for Information Security Appendix A ("Appendix A") of VA Handbook 6500.6 Contract Security must be completed for ALL acquisitions, with the exception of expendable supply items, which are defined in VA Handbook 7002, PART 3. CLASSIFICATION OF PROPERTY. The REQUESTER must include the phrase "expendable supply item" on the VA Form 2237 for all requirements of expendable supply items. Please use the 6500.6 Appendix A provided by Contracting.</p> <p style="margin-left: 40px;">YES NO () () Will the contractor have access to the VA computer system/sensitive information? () () to patient records? () () will work on VA property</p> <ul style="list-style-type: none"> Completed Security Assessment Form (VA 2280a). <p style="margin-left: 40px;">YES NO () () Is a Business Associate Agreement Required?</p> <p style="color: blue; margin-left: 20px;">Send a copy of your Statement of Work and your attempted answers to the questions above to the ISO and PO and wait for their feedback. You may need to have a conversation with the ISO and PO to further justify or explain your answers.</p>	<input type="checkbox"/>	<input type="checkbox"/>

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<p>14. Pre-Procurement Assessment (PPA) for Medical Device/Systems</p> <p>Veterans Affairs (VA) Directive 6550 establishes the technical PPA requirements for medical devices and medical systems that are connected to the VA information networks and medical devices that store sensitive patient information. All medical devices/systems are to be assessed prior to procurement and during the acquisition process based on the following factors: These factors include, but are not limited to, establishing technical requirements to support intended clinical use, human factors engineering, reliability, safety, integration, and available space and utilities.</p> <p>The PPA serves as the multi-disciplinary (BME, OIT and ISO) technical review and approval process. As such, IT Tracker number (ITAR) is not required. Where medical/devices are procured off contract vehicle such as SEWP, that requires ITARS number, 6550 will be used as the default number.</p> <p>Evaluating the configuration and security profile of medical devices during the acquisition planning process will identify potential risks and ultimately provide for more effective and safe integration of medical devices into hospital operations. Key organizations involved in this process are: Biomedical Engineering, Information Technology, Information Security, and Contracting and Contractor.</p> <p>Does this medical/device store patient data and will be connected to VA information network?</p> <p>YES () NO ()</p> <p> If yes:</p> <p>Was Biomedical Engineering involved in the PPA process?</p> <p>YES () NO ()</p> <p>To ensure that Biomedical Engineering was properly engaged in the procurement of all medical device/systems, a completed copy of the 6550 Appendix A must be submitted with the procurement package.</p>	<input type="checkbox"/>	<input type="checkbox"/>

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<p>15. Evaluation Criteria for other than Lowest Price Technically Acceptable (LPTA) Actions: Provide a list of recommended technical evaluation panel members. Provide evaluation criteria to always include Price and Past Performance. Additional factors, such as Management Approach, Technical Capability and Quality Assurance may also be included. For each factor, please describe the information to be requested from the offerors that will be used to evaluate the proposals. Based on the complexity of the procurement, sub-factors may also be developed for each of these.</p> <p>Evaluation factors are the standards against which a Technical Evaluation Board measures the quality of each proposal. For this section, clearly state all the evaluation factors that you will consider in making the source selection and their relative importance. These factors inform offerors of all the significant considerations in selecting the best value source and the relative importance the Government attaches to each of these considerations.</p> <p>You must include a statement of the relative importance of each factor. This is done in a variety of ways, such as "Factor No. 1 is twice as important as Factor No.2", or if weights are used, by assigning weights to the individual factors to indicate their importance. The factors should answer the question, "what attributes and capability must an offeror possess to be able to successfully perform the contract?"</p>	<input type="checkbox"/>	<input type="checkbox"/>
<p>16. Evaluation Team: Provide names of Government personnel to serve on the evaluation team. Make sure they are subject matter experts. Contracting will provide a Non-Disclosure Agreement (NDA) to be signed prior to evaluation of proposals. Please familiarize yourself with FAR 3.104 – Procurement Integrity.</p> <p>Provide names of subject matter experts who are agreeable and available to offer guidance on the vendor selection process. These people should have a very good knowledge of the product you would like to purchase and its actual usage. The evaluation team will use the evaluation criteria that you provided to rate each vendor. If you do not provide evaluation criteria, the evaluation team will usually choose the vendor that offers the lowest price that is technically acceptable.</p>	<input type="checkbox"/>	<input type="checkbox"/>