Contract Review Bureau Contract Checklist

## \*NOTE: CRB DOES NOT require that the Contract Checklist be delivered with the contract packet. The sole purpose of the checklist is to assist agencies with proper contract submission. Only provide all that is applicable to contract type.

**CONTRACT NAME/#:**

**ORIGINAL CONTRACT**

* **Original** Contract brief **in front of packet** (withsignature of Cabinet Secretary, Agency Head or Designee)
* **E brief** (unsigned copy) **–** *attach to SHARE Contract Module in MS Word Format*
* **Electronic copy** of Purchase Order with CRB origin and all agency level approvals complete (if SPA used, must have SPA number in the description)
* **DFA Budget approval for PSC** from your assigned budget analyst at State Budget Division
* **Contract** on CRB or DoIT Template with all signatures EXCEPT CRB
* **Sole Source** Sole Source Request and Determination Form signed by Agency Head and CPO (CRB will arrange for the State Purchasing signature)
	+ Original contract
	+ Email Copy of 30 day posting on State Purchasing website with no protest
	+ Email Confirmation of 30 day posting email from State Purchasing
	+ Copy of SPD Professional Services Determination
* **Agency Certification Form** Signed by Agency Head or Designee and contractor (must be a DFA authorized signature)
	+ Affidavit of former employment (if applicable) signed and notarized
	+ NM Attorney General memo (if applicable?) former employee less than five years – *attach to SHARE Contract Module*
	+ PERA memo if former employee retired from State government – *attach to SHARE Contract Module*
* Determination of Services from SPD (spd.determination@state.nm.us) should match Scope of Work (SOW should be included in the body of the email-not attachment) – *attach to SHARE Contract Module\*Good for 180 days*
* Horizons of NM decline email **or** printed list; if using printed list, **highlight** excluded service, **write** brief statement stating services are excluded and **initial/sign** statement – should match Scope of Work – *attach to SHARE Contract Module* \*\*Good for 90 days
* Copy of first page of Statewide Price Agreement and page stating amount allowed, hourly rate and/or tasks (IT) and ensure it has not expired – *attach to SHARE Contract Module*
* RFP pages (if applicable) provide the following sections – *attach (all below) to SHARE Contract Module*
	+ Cover page
	+ Table of contents
	+ Scope of Work
	+ Sequence of events (chart only)
	+ Proposal offer firm/term limitations/compensation limitations

Contract Review Bureau

Contract Amendment Checklist

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**CONTRACT NAME/#:**

## AMENDMENT

* Contract brief **in front of packet** (withsignature of Cabinet Secretary, Agency Head or Designee)
* **E brief** (unsigned copy) **–** *attach to SHARE Contract Module in MS Word Format*
	+ Signed original contract and subsequent signed amendments– *attach to SHARE Contract Module*
* **Electronic copy** of Purchase Order with CRB origin and all agency level approvals complete (if SPA used, must have SPA number in the description)
* **DFA Budget approval for PSC** from your assigned budget analyst at State Budget Division
* **Contract** Amendment with acceptable signatures –no generic signature font
* **Original** Sole Source Request and Determination form (if applicable)
	+ Copy of 30 day posting on State Purchasing website – (submit with Sole Source packet)
	+ Confirmation of 30 day posting email from State Purchasing (submit with Sole Source packet)
* Agency Certification Form if previous form is older than 90 days (must be a DFA authorized signature)
	+ **Affidavit** of Former Employee (if applicable) signed and notarized
	+ NM Attorney General memo (if applicable?) **(ONLY if original was not reviewed by AG) –** *attach to SHARE Contract Module*
* PERA memo (if applicable) if former employee **retired** from State government – *attach to SHARE Contract Module*
* Copy of first page of Statewide Price Agreement and page stating amount allowed, hourly rate and/or tasks (IT) and ensure it has not expired – *attach to SHARE Contract Module*
* RFP, provide the following pages if applicable – *attach (all below) to SHARE Contract Module*
	+ Cover page
	+ Table of contents
	+ Scope of Work
	+ Sequence of events (chart only)
	+ Proposal offer firm/term limitations/compensation limitations