



- I. Purpose To provide operational guidelines on updating and maintaining requisition to purchase order, change order and contract log reports.
- II. Scope These procedures apply to all Purchasing personnel, particularly the Office Assistant At the Receptionist desk in using the log for receipt of all requisitions received via courier, fax Or at the printer (PU1) and for logging the assignment(s) by the Purchasing Manager or his designee.
- III. Responsibility
- A. Authority  
The Purchasing Manager has delegated responsibility to the Supervisors, Purchasing Agents and Office Assistants outlined in the following procedures:
- B. Procedure
1. The Office Assistant at the reception area will input data into the requisition and change order logs beginning with the requisition number or change order number and ending with Agent assigned.
  2. The Office Assistant assigned to the requisition or change order will input the data beginning with OA assigned and ending with type of requisition, number of days for agent to review and color code the requisition number or change order number column.
  3. The Purchasing Manager will input the Performance Standards.
  4. The Contract Log data will be entered by the Agent ONLY.
- When a specification number is obtained by the Agent, all other data will be entered and the status column color coded.
- C. Color Codes
1. No color in the line item that the item has not been passed on by the Agent.
  2. Green – all solicitation, requisitions and change order are on task.
  3. Yellow – Needs attention
  4. Red – item is not in compliance
  5. Once an item has been completed it will remain green on the log in the first column of the requisition to purchase order/change order report log.

**EXAMPLES For Color Coding.**

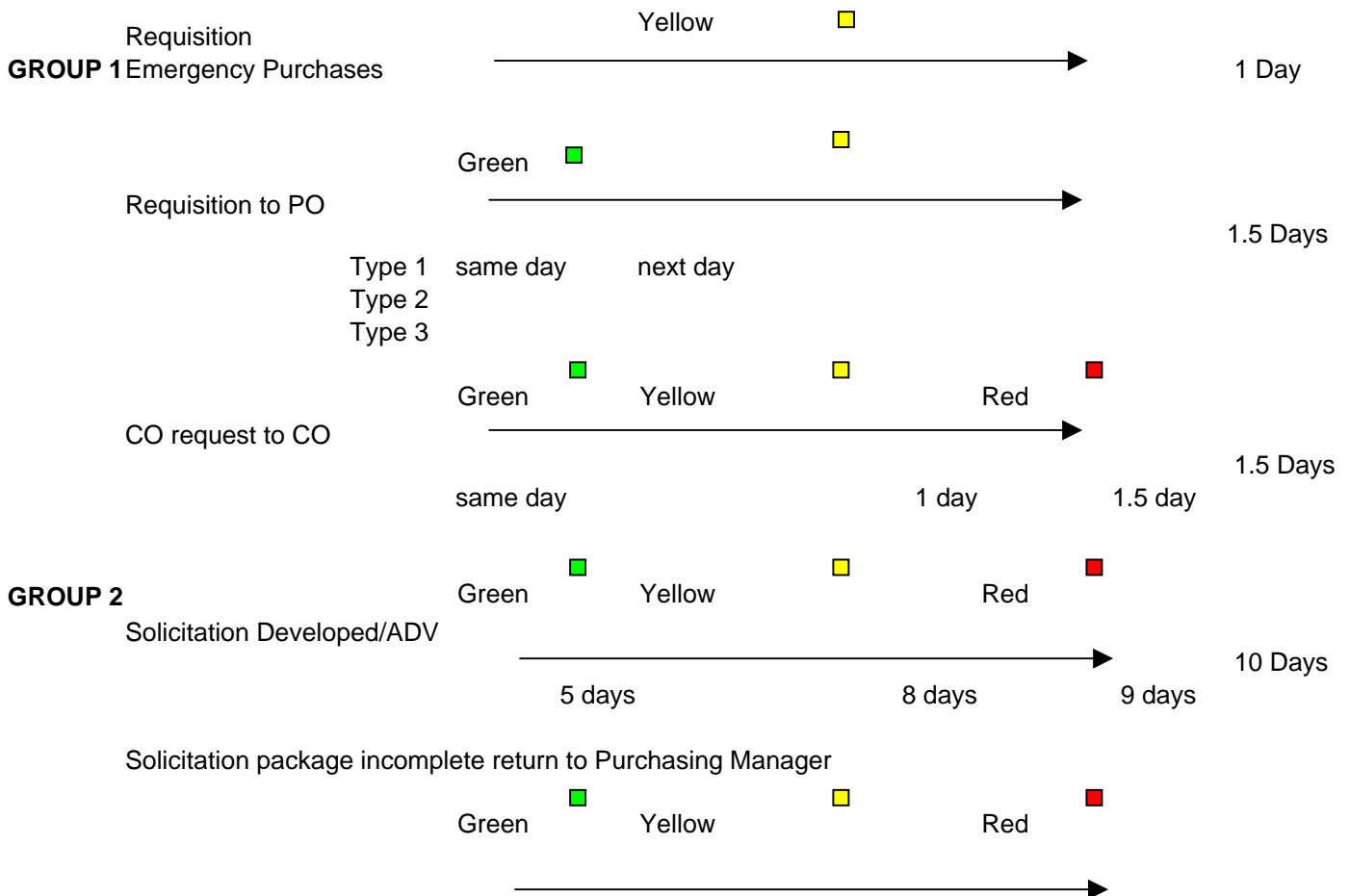
- a. Yellow – item is in need of: a W-9; insufficient funds, waiting on vendor number, needs signatures P & P bonds, insurance executed agreement contracts.
- b. Red – waiting on budget amendment, needs to be processed immediately post award compliance has not been met within the specified time allotted, waiting on executed copy from the County Administrator/Assistant County Administrator.



D. Examples of Color Coding within the time frame for i.e., performance standards

- Group 1 – Emergency Purchases
- Group 2 – Solicitations
- Group 3 – Selection and Negotiations CMTE
- Group 4 – Addendums
- Group 5 – Recommendation
- Group 6 – Post-Award Compliance
- Group 7 – Contract Amendments

Open	Green	All Solicitations, requisitions and change orders are on TASK
Open	Yellow	Needs attention
Open	Red	Has not met Post Award Compliance in the allotted time frame

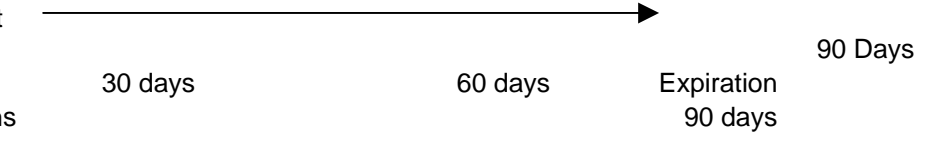




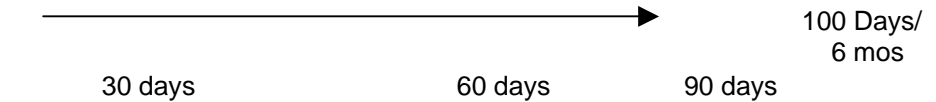
Timely receipt of permit  
 info to be published in bid  
 from client dept/bldg insp.



Resolicitation of requirement  
 County wide master term  
 contracts **before** contract  
 expiration date/ and 6 months  
 optional extension



Resolicitation of a  
 requirement County-Wide  
 master term contract **after**  
 it has gone full term  
 and is in the 6 months  
 extension period



Resolicitation of an  
expired County-Wide  
 master term contract  
 and assigned by  
 Purchasing Manager

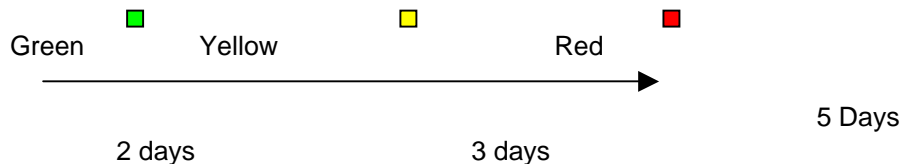


**GROUP 3**

Selection & Negotiation  
 Committee convenes  
 (Mtg. Sched after opening  
 basis 10 day disclosure rule)



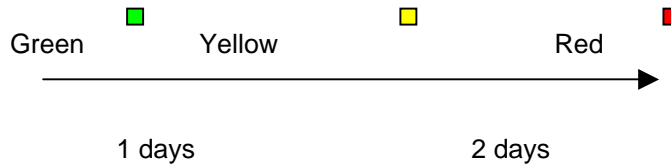
Subsequent Mtgs. after the  
 1st mtg. of the Selection  
 & Negotiation  
 Proposal Review Committee





**GROUP 4**

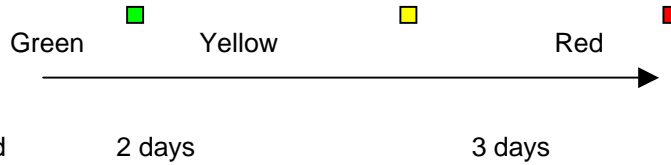
Addendum(s) prepared  
 in sufficient time before  
 original bid opening date



2 Days

**GROUP 5**

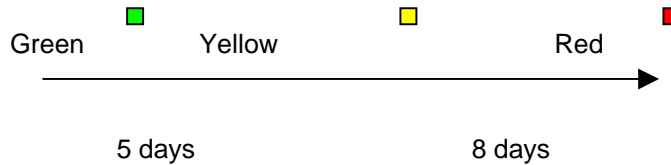
Recommendation Prepared  
 (In time for next BCC Mtg  
 after determination for award  
 or committee recommendation)



5 Days

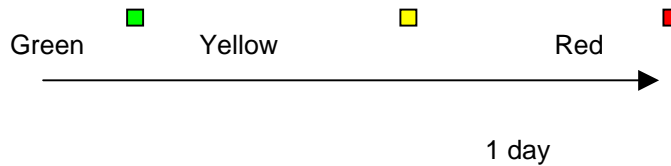
**GROUP 6**

Post Award Compliance  
 (PP Bonds, Insurance  
 Signed Contracts)



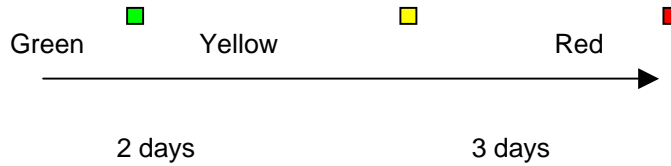
10 Days

Signature of CA or ACA



2 Days

**GROUP 7** Contract Amendment(s)  
 (Master Term Contract)



5 Days