



STANDARD PROCEDURE

DESCRIPTION

Title: Document Standards

Effective: October 24, 2011

No. SP 006

Revision: 0

The following is the standard procedure for the document order and naming of attachments for upload into ProcureAZ.

STANDARD PROCEDURE

1. Required Solicitation Documents

1.1 Procurement officer develops a solicitation and uploads into ProcureAZ as instructed in the *Procurement Officer Training*. The solicitation shall be uploaded in separate parts with each part numbered and named.

▪ **See:** *Procurement Officer Training Guide*

1.2 Invitation for Bid (IFB) documents shall be named and subsequently uploaded in the following order:

Section	Naming convention	Content	Format
Part 1	Pre-Solicitation documents	Applicable Determinations Legal Notice Applicable pertinent information	PDF
Part 2	Solicitation	Notice Page Table of Contents Specifications/SOW Special Terms and Conditions Exhibits	PDF
Part 3	Uniform T's & C's	Uniform Terms and Conditions	PDF
Part 4	Uniform Instructions	Uniform Instructions to Offerors	PDF
Part 5	Special Instructions	As required per agency	PDF
Part 6	Attachments	Offer and Award All attachments that must be included and returned with the bid response	Word document or fillable PDF

NOTICE: This Standard Procedure is provided as a resource to the Procurement Officers of the Agencies, Boards and Commissions of the State of Arizona. While this Standard Procedure is an example of a legally compliant, procedurally efficient and fiscally prudent process, it is not intended to represent the only such process allowable under the Arizona Procurement Code, ARS 41 § 41-2501, et. seq. Depending on the circumstances surrounding a given procurement, deviation from this Standard Procedure may be necessary and/or preferable. Procurement Officers should consult with their Agency Chief Procurement Officer and/or the State Procurement Office if they have any questions regarding the application of this Standard Process.

- 1.2 Request for Proposal (RFP) documents shall be named and subsequently uploaded in the following order:

Section	Naming convention	Content	Format
Part 1	Pre-Solicitation documents	<ul style="list-style-type: none"> • Applicable Determinations; i.e. RFP, Brand Name • Legal Notice • Relevant information 	PDF
Part 2	Solicitation Document	<ul style="list-style-type: none"> • Notice Page • Table of Contents • Specifications/SOW • Special Terms and Conditions • Exhibits 	PDF
Part 3	Uniform T's & C's	<ul style="list-style-type: none"> • Uniform Terms and Conditions 	PDF
Part 4	Uniform Instructions	<ul style="list-style-type: none"> • Uniform Instructions to Offerors 	PDF

- 1.3 In some cases the Solicitation may require additional documents and those are to be named as appropriate.

Section	Naming convention	Content	Format
Part 4	Additional Documents; i.e. Federal Terms, AIA documents, plans, drawings Note: These may require several files	<ul style="list-style-type: none"> • Additional documents relevant to the solicitation 	PDF

- 1.4 Required Solicitation Amendment Documents

When a solicitation amendment is required the procedure identified in the Solicitation Amendment Quick Reference Guide shall be followed.

- See Quick Reference Guide *Solicitation Amendment*

Section	Naming convention	Content	Format
Part 5	Amendment Number and Issue Date i.e. Solicitation Amendment No. 1 09-27-11	<ul style="list-style-type: none"> • Solicitation Amendment and supporting documents 	PDF

2. Required Contract Documents

2.1 Once responses have been evaluated and awarded the required solicitation documents must be moved per the purchase order creation options.

See Quick Reference Guide *Creating Contracts*

The required documents include but are not limited to:

Section	Naming convention	Content	Format
Part 1	Contract Document	<ul style="list-style-type: none"> • Notice Page • Table of Content • Specifications/SOW • Uniform Terms and Conditions • Special Terms and Conditions • Uniform Instructions to Offerors • Exhibits • All documents relevant to the contract; i.e. Federal Terms, AIA documents, plans, drawings 	PDF
Part 2	Contractor's proposal or bid response	<ul style="list-style-type: none"> • All documents submitted by the successful Offeror that were not deemed confidential • Required attachments; i.e. Offer and Award, non-collusion affidavit, references, etc. 	Word document or fillable PDF
Part 3	Evaluation Documents	<ul style="list-style-type: none"> • Evaluation Abstract and Committee Comments Summary; Evaluation Summary ; 	PDF
Part 6	Award Documents	<ul style="list-style-type: none"> • Tentative Award Letter; Notice of Award; Offer and Award and any other applicable evaluation documentation 	PDF
As Required	Insurance: Type and Date; i.e. CG 09-28-2011, WC 09-28-2011	As required	PDF
As Required	Contract Amendment No., date, and brief description or Change Order No., date, and brief description	As required	PDF

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Section	Naming convention	Content	Format
As Required	Miscellaneous documents Named per document; i.e. Determination-CI; Cure Notice, VPR, etc.	Determinations, VPR, correspondence, off contract request,	PDF

See: A.R.S. § 41-2533, R2-7-B314 (E)

A.R.S. § 41-2534, R2-7-C317 (E)

A.R.S. § 41-2535, R2-7-D304 (D)

A.R.S. § 41-2538, R2-7-F309 (D)

EFFECTIVE

This Standard Procedure is hereby authorized and effective
this 24th day of October 2011, unless otherwise revised or repealed.



Jean A. Clark, FNIGP, CPPO, CPPB, C.P.M.
State Procurement Administrator

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