

# Requisition Checklist

Ministry of Central Services  
Procurement Services

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## Purpose of Checklist

The purpose of this checklist is to provide guidance on fully completing Midas requisitions.

**Requisitioners and end users should ensure that sufficient time is allocated for the entire procurement process to occur, which generally can take at a minimum 3 weeks and up to several months depending on the complexity of the procurement.**

## Purchasing Method

	Questions	Comments
	<p><b>Have you checked if there is a standing offer for the goods you require?</b></p>	<p>Standing Offers are established for common or recurring commodities and may be accessible to ministries.</p> <p>Before a requisition is created, the standing offer website should be consulted to determine whether the purchase can be made through this method.</p> <p>Standing Offers are available from the Standing Offer Website: <a href="http://www.standingoffers.gov.sk.ca">www.standingoffers.gov.sk.ca</a></p>
	<p><b>Is there a delegation established that you can make this purchase against?</b></p>	<p>If the total purchase is valued at \$10,000 or less, Delegation 1 can be used for the purchase and a requisition is not required.</p> <p>Information relating to Delegations is available from the Guide to Procurement, available on the <a href="#">SaskTenders</a> website, under the <a href="#">Policies and Guidelines Tab</a></p> <p>Where the purchase is valued under \$2,500 it is recommended that three quotes be sought.</p> <p>If the purchase value is above \$2,500 three quotes must be obtained.</p> <p>A Quote Sheet is available for use from the <a href="#">SaskTenders</a> website under the <a href="#">Policies and Guidelines Tab</a></p>
	<p><b>Is this a one-time purchase or do you have an on-going requirement for the items?</b></p>	<p>If it appears that this may be an on-going requirement, a more appropriate procurement tool may be the establishment of a Standing Offer, versus continually requiring a procurement process every time a purchase is required.</p>
	<p><b>If there is an on-going requirement, what is the period of time?</b></p>	<p>Where an ongoing requirement exists, the timeframe needs to be identified in the original procurement activity.</p>

### Appropriate Ministry Contacts

	Questions	Comments
	<p>Have you identified the appropriate ministry representative who would be able to provide technical or performance information to Procurement Services, should there be any questions on the purchase?</p>	<p>In the process of conducting a competition, there may be many clarifications needed by Procurement Services or potential suppliers which could only be answered by the ministry.</p> <p>It is crucial that the appropriate contact information is provided at the beginning of the process so there are no delays.</p>

### Product Questions

	Questions	Comments
	<p>Have you identified all of the following:</p> <ul style="list-style-type: none"> <li>• quantities for each item being requested?</li> <li>• units of measure?</li> <li>• a complete, detailed item description/specification?</li> <li>• estimated cost for the items?</li> </ul>	<p>Providing all of the information requested will allow Procurement Services to understand what is being requested, which is used to assist in the development of the competition document.</p>
	<p>Is there a requirement for compatibility with any other commodities? If so, what must they be compatible with?</p>	<p>If products must be fully compatible with other commodities currently possessed, this needs to be clearly identified in the requisition so it may be included in the competition document.</p>
	<p>Is a no-substitution product being requested?</p>	<p>If a particular product is being required and substitutions are not being accepted, there must be clear justification provided as to why equivalents will not be considered.</p> <p>Generally, no-substitutions should not be identified, and equivalent products evaluated and considered to ensure a fair and open competitive process.</p>
	<p>Are there any standards that would apply to this purchase?</p>	<p>Where specific standards (e.g. CSA) are required, this needs to be clearly identified in the requisition so it may be included in the competition document.</p>

### Trade In Options

	Questions	Comments
	<p>Have you identified whether a trade-in is an option for this purchase?</p>	<p>Should a trade-in be an option, please ensure that this is identified in the requisition so that it can be included in the competition document as potential suppliers need to be made aware of this option.</p>

### Delivery Requirements

	Questions	Comments
	<b>Have you identified when the goods are required?</b>	Where there are timeframe constraints, this needs to be clearly identified in the requisition so it may be included in the competition document.
	<b>Have you provided delivery requirements (i.e. FOB Destination only or FOB Destination unloaded)</b>	To ensure all parties fully understand what is required, it is important to know who is responsible for the items during shipping and who is responsible to unload the items.
	<b>Have you completed the appropriate Ship To and Bill To addresses</b>	These addresses may be different and could impact the pricing provided by bidders. It is important to be as specific as possible.
	<b>Is there specific documentation which needs to accompany the products (i.e. WHMIS information)?</b>	Should additional or unique documentation be needed, please ensure that this is identified in the requisition so that it can be included in the competition document.
	<b>Will someone be able to inspect the goods once received?</b>	<p>Once a good or service has been provided, it is the responsibility of the purchasing entity to inspect the good before it can be accepted.</p> <p>Where deficiencies are found, they must be identified to the supplier as soon as possible, along with Procurement Services.</p>

### Installation Requirements

	Questions	Comments
	<b>Have you identified whether installation of the product is included in the purchase?</b>	Where installation is required this needs to be clearly identified in the requisition so it may be included in the competition document.

### Warranty/Service Requirements

	Questions	Comments
	<b>Have you identified whether warranty/service of the product is required?</b>	Where specific warranty requirements are required this needs to be clearly identified in the requisition so it may be included in the competition document.

### Additional Quantity Requirements

	Questions	Comments
	<p><b>Have you identified whether, beyond the original purchase, the ministry would entertain additional orders depending on pricing and need?</b></p>	<p>If the possibility of additional purchases may be an option this would need to be clearly identified in the requisition so it may be included in the competition document.</p> <p>Generally there would be a timeframe or percentage limit on this type of purchase such as within 4 months or 20% of the original order.</p> <p>Any preference would need to be identified in the requisition.</p>

### Pricing Questions

	Questions	Comments
	<p><b>Have you identified which taxes, or other fees are applicable to this purchase?</b></p>	<p>Most Government of Saskatchewan entities are GST exempt, but this cannot be assumed.</p> <p>Please ensure that you determine which taxes or other fees are applicable to this purchase.</p>
	<p><b>Have you provided accounting codes (e.g. entity, program, organization and account codes) that will apply to this purchase?</b></p>	<p>Accounting codes are required in Midas to ensure that any financial commitments made in relation to this purchase are taken from the appropriate budgetary allotment.</p>

### Evaluation Considerations

	Questions	Comments
	<p><b>Have you identified how responses are to be evaluated?</b></p>	<p>How responses from potential suppliers will be evaluated needs to be clearly identified in the requisition so it may be included in the competition document.</p> <p>Ministries should consider what is important to them in relation to the purchase. If something is important (i.e. warranty, service) it should be included as an evaluation criteria.</p> <p>A separate evaluation sample guide is available from the <a href="#">SaskTenders</a> website under the <a href="#">Policies and Guidelines Tab</a></p>