



Contract File Checklist

eMACS maintains the official contract record. Most of the documentation is contained in the system. The Contracts Officer **must** verify that the contract record is complete before close-out and archiving.

4

Procedure: State Procurement Services Division Contract Management Procedure

Agency Contract

1

Statute: Montana Code Annotated 18-4 Montana Procurement Act

3

Policy: MOM-SFSD-POL-Contract Management

- Fully executed Contract, including all attachments.
- All fully executed copies of any amendments and renewals on the Contract.
- Completed Renewal Justifications for each renewal.
- Insurance documentation.
- Contract performance security documents (if applicable).
- Correspondence between State and Contractor over the course of the contract.
- Completed Contract Close-out form.

3

Policy: MOM-SITSD-POL-Information Technology Procurement Request (ITPR)

- Approved ITPR (if applicable)
- ITPRs for each renewal and amendment (if applicable).

Statewide Contract

1

Statute: Montana Code Annotated 18-4 Montana Procurement Act

3

Policy: MOM-SFSD-POL-Contract Management

- Fully executed copy of the contract (if SPB solicited) or Participating Addendum-PA (if cooperative solicited), including all attachments.
- All fully executed copies of any amendments and renewals on the contract.
- Insurance documentation.
- Contract performance security documents (if applicable).
- Correspondence between State and Contractor over the course of the contract.
- Completed Contract Close-out form.

1

Statute: Montana Code Annotated 18-4-407: Cooperative Purchasing: Review of Procurement Requirements

- One-page ordering instructions summary.

3

Policy: MOM-SITSD-POL-Information Technology Procurement Request (ITPR)

- Approved ITPR (if applicable)
- ITPRs for each renewal and amendment (if applicable).

Sole Source Contract

1

Statute: Montana Code Annotated 18-4-306 Montana Procurement Act: Sole Source Procurement Records

2

Administrative Rule: 2.5.604 Sole Source Procurement

3

Policy: MOM-SFSD-POL-Contract Management

- Record of the completed requisition, appropriate approvals, and all supporting documents received from the Agency. (NOTE: if the contract request was created from the eMACS requisition, this would be linked to the contract, please verify)
- Approved Sole Source Memo (should be in the original request, please verify)
- Verification of suspension/debarment search.
- Notice of Intent to Sole Source results (if applicable)
- Clarification, Negotiation, and/or BAFO documents (if applicable).
- Protest documentation (if applicable).
- Request for Documentation
- Fully executed Contract, including all attachments
- Sole Source Justification and Approvals for amendments or renewals.
- Contract performance security documents (if applicable)
- Correspondence between State and Contractor over the course of the contract
- Completed Contract Close-out form

3

Policy: MOM-SITSD-POL-Information Technology Procurement Request (ITPR)

- Approved ITPR (if applicable)
- ITPRs for each renewal and amendment (if applicable)