

REQUISITION INSTRUCTIONS

COMPLETE ENTIRE FORM. DO NOT DELETE ANY PART.

Filling Out the Form

Complete **BILL TO:** and **SHIP TO:** by filling in the requested information.

Date: Use current date.

Agency Requisition Number: Your agency's choice. SPB will use the number you supply.

Agency Name: Insert your agency's name.

Division Name: Insert your division's name or "N/A."

Bureau Name: Insert your bureau's name or "N/A."

Agency Contact Person: Who SPB should call with questions on the project.

Phone: Phone number of agency contact person.

Fax: Fax number of agency contact person.

E-mail: E-mail address of agency contact person.

Requisition Prepared By: Name of person completing the requisition form.

1. **Short project title:** Supply up to five words suitable for a solicitation title.
 2. **For which fiscal year:** Fiscal year the payment will come out of.
 3. **Are federal funds involved?** Tells SPB whether to check federal debarred list and whether reciprocal preference should not be considered.
 4. **Suggested vendors list attached?** Not required, but tells SPB if there are some vendors you want to be sure to receive notification of the solicitation. You may use your own list and/or search for vendors registered on the State's Vendor List <http://svc.mt.gov/gsd/vendorlistaccess/login.aspx?ReturnUrl=%2fgsd%2fvendorlistaccess%2fvendorlistdefault.aspx>. Provide current vendor contact information.
 5. **Could this project be done as an enterprise solution?** Tells SPB whether other agencies could potentially benefit from this particular project. If yes (or if unsure), select yes and note in the comments section why the project might (or might not) work as an enterprise solution.
 6. **RFP/IFB/Sole Source:** Note your preference for a solicitation method. If requesting a sole source purchase, be sure to attach the required justification.
 7. **Will payments to contractor be made via ProCard?** Indicates whether you intend to pay the contractor using the State's procurement card. While this method of payment is not mandated, it is preferred.
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Description: The specification details can be provided in the space available on the requisition form or attached in a WORD document to the e-mail message. **Note: An estimated dollar amount must be included that corresponds to the "initial contract value." If renewals are anticipated, please note in the Description.**

Authorized by: Fill in the name of the person authorizing the procurement. **Note: We strongly recommend that your agency print a hard copy of the requisition, have it signed, and store it in your office for audit purposes.**

Director AND Budget Office signature must be obtained *prior* to submitting any requisition with a Total Contract Value of over \$200,000. "Total contract value" means the entire potential monetary worth of a project from beginning to completion, including the initial contract period and any options to renew.

Comments: Use this area to give SPB additional information, to include accounting data for internal use, etc.

Signing and Submitting Your Requisition:

The PDF Requisition Form is a fillable form that can either be printed and delivered to the SPB Office or be submitted via email. When filling out the form, follow the directions as indicated on the first page. Once the form is filled out, **a signature must be included before the SPB will accept the form.** In order to sign the document electronically, click on the “authorized by” box and follow the instructions. For new Adobe signatories, follow these instructions:

Initial pop-up box:

“A new digital ID I want to create now” NEXT

“New PKCS#12 digital ID file” NEXT

Enter Name/email/etc. NEXT

Enter password FINISH

A new pop-up will appear asking you to select your signature and input your password. You can adjust the appearance of your signature by clicking the drop-down Appearance box option, “Create New Appearance.” When you are satisfied, click “SIGN” to add your signature.

Once the signature is complete, you can submit the document by selecting the “Submit by Email” button located at the top of the document. This button will automatically open an Outlook email to the SPB with the form attached. Or if preferred, the form can be delivered or faxed to the SPB Office.

**PLEASE REMEMBER TO USE THE CURRENT PROCUREMENT FORMS FOUND
AT <http://gsd.mt.gov/ProcurementServices/procurementforms.mcp>
TO PREPARE YOUR SOLICITATION.**