|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **When to Use :** Assigning a contract from one supplier to another.  **Instructions:**  Complete and save this form in WORD and upload all required documents to PeopleSoft. Initiate OCA review through ServiceNow. [Click here to learn how to use ServiceNow to Submit a Contract Review Request](https://sfgov.org/oca/sites/default/files/How%20to%20Use%20ServiceNow%20to%20Submit%20a%20Contract%20Review%20Request_0.pdf).  **When Executing in Conjunction with an Amendment:** If you are executing the Assignment & Assumption or Novation in conjunction with an Amendment, separately complete the appropriate contract certification checklist for the Amendment and include it with your request. | | | | |
| **Check off all that apply** | P-660  P-665  Other: | | | |
| **Are you using DocuSign?** |  | **Contract docs uploaded in PS?** | |  |
| **PS Contract ID:** |  | **Dept Contract ID** (if any): | |  |
| **Contact Name:** |  | **Department:** | |  |
| **Contact Email:** |  | **Contact Phone:** | |  |
| **(OCA Only) Purchaser Name:** |  | **( OCA Only) Date Reviewed:** | |  |
| **SUPPLIERS’ DETAILS** | | | | |
| **Existing Supplier ID:** |  | **Existing Supplier Name:** | |  |
| **New Supplier ID:** |  | **New Supplier Name:** | |  |
| **New Supplier 12B Compliant?** (NA if Waived) |  | **New Supplier Headquarters**  (For Admin Code 12X Analysis) | |  |
| **New Supplier** [**First Source Hiring**](https://oewd.org/sites/default/files/Workforce/Workforce-Docs/First%20Source%20Fact%20Sheet%202017.pdf) **form emailed to OEWD?** |  | First Source Hiring Form required for all new and amended contracts > $50K. Not required for Equipment Leases & Software Agmts. w/out labor. **If the form was required for original Supplier, new Supplier must also complete it.** | | |
| **New Supplier** [**MCO/HCAO**](https://sfgov.org/olse/sites/default/files/Document/HCAO%20MCO%20Documents/SF_Labor_Laws_for_SFO_Contractors_Package_Effective_Jan_1%2C_2019_Final.pdf) **Status Updated in PS?**  (N/A if waived) |  | If HCAO/MCO are not waived, Supplier’s HCAO/MCO status must be updated in PS in the Supplier Module. To update supplier’s status, email HCAO/MCO declarations to [Supplier.Management@sfgov.org](mailto:Supplier.Management@sfgov.org). **If HCAO/MCO declarations were required for original Supplier, new Supplier must also complete them.** | | |
| **ORIGINAL / NEW CONTRACT DETAILS** | | | | |
|  | **Original Contract NTE Amt** | **Original Contract**  **Start Date** | **Original Contract**  **End Date** | **OCA Only:**  **Rate Adjust.?** |
| **Original Contract** |  |  |  |  |
| **Original Contract Amend 1** |  |  |  |  |
| **Original Contract Amend 2** |  |  |  |  |
| **Original Contract Amend 3** |  |  |  |  |
| **Original Contract Amend 4** |  |  |  |  |
| **Original Contract Amend 5** |  |  |  |  |
| **Original Contract Amend 6** |  |  |  |  |
| **Original Contract Amend 7** |  |  |  |  |
| **Original Contract Amend 8** |  |  |  |  |
| **Original Contract Amend 9** |  |  |  |  |
| **Original Contract Amend 10** |  |  |  |  |
| **Original Contract’s Purchasing Authority:** | | **Solicitation**  **OCA Waiver**   **Other: \_\_\_\_\_\_\_\_\_\_** | | |
| **New Contract NTE Amount in PeopleSoft** | **Original Contract Ending Balance in PS:**  **New Contract NTE Amount in PS:**  **Are the above values the same?  Yes  No** If no, explain: | | | |
| **New Contract Start/End Dates in PeopleSoft** | **Original Contract Start/End Dates in PS:**  **New Contract Start/End Dates in PS:**  **Are the above values the same?  Yes  No** If no, explain: | | | |

|  |  |  |
| --- | --- | --- |
| **Contract Packet Documentation Checklist** | | |
| Except for copies of an Agreement routed for wet signature, each document in this checklist must be uploaded into PeopleSoft prior to requesting OCA approval. When stating “N/A”, the reason must be obvious or explained. | | |
| **AGREEMENT** | | |
| **Document** | **Uploaded?** | **Explanation/Comments** |
| 1. **Agreement.** Must include original agreement and all amendments as an Appendix**.**  * **Wet Signatures:** Deliver 3 original copies to OCA. * **DocuSign:** Ensure agmt. and appendices are in PS as one complete document for e-signature. |  |  |
| **Dept’s Commission Approval** | | |
| **Document** | **Uploaded?** | **Explanation/Comments** |
| 1. **Dept’s Commission Approval** (Applicable if original contract required the Dept’s Commission approval). |  | Approved Duration:  Approved Amount:  Resolution Number: Signed Date: |
| **CONTRACT MONITORING DIVISION (CMD)** | | |
| **Document** | **Uploaded?** | **Explanation/Comments** |
| 1. **CMD 12B Compliance Waiver.** (If new Supplier is not 12B Compliant. N/A if Purchasing Authority is 21.30) |  | Approved Duration:  Approved Amount: |
| 1. **CMD Form 3: CMD Non-Discrimination Affidavit.** (Must be completed by the new Supplier if required for the original Supplier). |  |  |
| **INSURANCE & LIABILITY** | | |
| **Document** | **Uploaded?** | **Explanation/Comments** |
| 1. **Insurance:**  * Place an “X” next to each item required by City template & submit evidence of item marked. * Additional Insured Endorsement Requirements: Must: (a) name the “City and County of San Francisco, its Officers, Employees and Agents” or (b) be a blanket endorsement as required by a written contract. | | |
| **General Liability** (COI) |  |  |
| **GL Addt’l Insured Endorsement** |  |  |
| **Auto Liability** (COI) |  |  |
| **Auto Addt’l Insured Endorsement** |  |  |
| **Workers Compensation** (COI) |  |  |
| **Waiver of Subrogation** |  |  |
| **Professional Liability** (COI) |  |  |
| **Tech Errors and Omissions** (COI) |  |  |
| **Cyber Security** (COI) |  |  |
| **Privacy** (COI) |  |  |
| **Pollution Liability** (COI) |  |  |
| **Pollution Addt’l Insured Endorsement** |  |  |
| **Garagekeepers/Property of Others** (COI) |  |  |
| **Other** (COI)(e.g. Marine Liability, etc.) |  |  |
| **OTHER** | | |
| 1. **System for Award Management (SAM) Printout** (if Federal funds are involved) |  | * Go to: <https://www.sam.gov/SAM/pages/public/searchRecords/search.jsf> * Enter entity DUNS/CAGE Code and click ‘Search’. “Save as PDF’” |