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| **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. **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: |

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| **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.
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| **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’”
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