Procurement Review Comprehensive Checklist
Procurement Services Division
This form must accompany all Purchase Order Requisitions

## SECTION 1: DESCRIPTION

| *General Tracking* | | *Contract Terms* | |
|---|---|---|---|
| FILE ID#:<br>23-3470 | RFP, BID, QUOTE OR RENEWAL #: | INITIAL TERM WITH RENEWALS:<br>OTHER | INITIAL TERM TOTAL COST:<br>$63,300.76 |
| COMMITTEE:<br>TECHNOLOGY | TARGET COMMITTEE DATE:<br>11/07/2023 | PROMPT FOR RENEWAL:<br>3 MONTHS | CONTRACT TOTAL COST WITH ALL RENEWALS:<br>$63,300.76 |
| | CURRENT TERM TOTAL COST:<br>$63,300.76 | MAX LENGTH WITH ALL RENEWALS:<br>ONE YEAR | CURRENT TERM PERIOD:<br>INITIAL TERM |
| *Vendor Information* | | *Department Information* | |
| VENDOR:<br>Imaging System, Inc. d/b/a IDT | VENDOR #:<br>11487 | DEPT:<br>Information Technology | DEPT CONTACT NAME:<br>Joe Hamlin |
| VENDOR CONTACT:<br>Donna Taconi | VENDOR CONTACT PHONE:<br>630-875-1100 | DEPT CONTACT PHONE #:<br>630-407-5063 | DEPT CONTACT EMAIL:<br>Joe.Hamlin@dupagecounty.gov |
| VENDOR CONTACT EMAIL:<br>Donna.Taconi@idt-inc.com | VENDOR WEBSITE: | DEPT REQ #: | |

*Overview*

DESCRIPTION Identify scope of work, item(s) being purchased, total cost and type of procurement (i.e., lowest bid, RFP, renewal, sole source, etc.).
Annual maintenance for imaging systems for a total amount of $63,300.76 - sole source.

JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished
Annual Hyland & CAPSYS Software Assurance renewal for Supervisor of Assessments, Treasurer, Family Center, Coroner, and County Clerk.

## SECTION 2: DECISION MEMO REQUIREMENTS

DECISION MEMO NOT REQUIRED Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is not required.
SOLE SOURCE PER DUPAGE ORDINANCE, SECTION 2-350 (MUST FILL OUT SECTION 4)

DECISION MEMO REQUIRED Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is required.

## SECTION 3: DECISION MEMO

| | |
|---|---|
| STRATEGIC IMPACT | Select an item from the following dropdown menu of County's strategic priorities that this action will most impact. |
| SOURCE SELECTION | Describe method used to select source. |
| RECOMMENDATION AND TWO ALTERNATIVES | Describe staff recommendation and provide justification. Identify at least 2 other options to accomplish this request, including status quo, (i.e., take no action). |

## SECTION 4: SOLE SOURCE MEMO/JUSTIFICATION

| | |
|---|---|
| JUSTIFICATION | Select an item from the following dropdown menu to justify why this is a sole source procurement.<br>SOLE AUTHORIZED DISTRIBUTOR WHERE THE MANUFACTURER HAS ESTABLISHED TERRITORIES |
| NECESSITY AND UNIQUE FEATURES | Describe the product or services that are not available from other vendors. Explain necessary and unique features or services. Attach letters from manufacturer, letters from distributor, warranties, licenses, or patents as needed. Be specific.<br>Imaging Systems, Inc. d/b/a Integrated Document Technologies (IDT) is the sole authorized support provider for both CAPSYS Capture & OnBase for DuPage County. Additionally, IDT implemented these solutions at the County, giving them firsthand knowledge of how the two applications are configured and operate with each other and other systems used by multiple departments within DuPage County. |
| MARKET TESTING | List and describe the last time the market has been tested on the applicability of the sole source. If it has not been tested over the last 12 months, explain why not.<br>N/A - Imaging Systems, Inc. d/b/a Integrated Document Technologies (IDT) is the sole authorized support provider for both CAPSYS CAPTURE & OnBase for DuPage County. |
| AVAILABILITY | Describe steps taken to verify that these features are not available elsewhere. Included a detailed list of all products or services by brand/manufacturer examined and include names, phone numbers, and emails of people contacted.<br>N/A - Imaging Systems, Inc. d/b/a Integrated Document Technologies (IDT) is the sole authorized support provider for both CAPSYS CAPTURE & OnBase for DuPage County. |

## SECTION 5: Purchase Requisition Information

| *Send Purchase Order To:* | | *Send Invoices To:* | |
|---|---|---|---|
| Vendor:<br>Imaging System, Inc. d/b/a IDT | Vendor#:<br>11487 | Dept:<br>IT | Division: |
| Attn:<br>Donna Taconi | Email:<br>Donna.Taconi@idt-inc.com | Attn:<br>Sarah Godzicki | Email:<br>Sarah.Godzicki@dupagecounty.gov |
| Address:<br>PO Box 482 | City:<br>Itasca | Address:<br>421 N. County Farm Road | City:<br>Wheaton |
| State:<br>IL | Zip:<br>60143-0482 | State:<br>IL | Zip:<br>60187 |
| Phone:<br>630-875-1100 | Fax:<br>630-875-1101 | Phone:<br>630-407-5037 | Fax: |
| *Send Payments To:* | | *Ship to:* | |
| Vendor:<br>SAME AS ABOVE | Vendor#: | Dept:<br>IT | Division: |
| Attn: | Email: | Attn:<br>Joe Hamlin | Email:<br>Joe.Hamlin@dupagecounty.gov |
| Address: | City: | Address:<br>421 N. County Farm Road | City:<br>Wheaton |
| State: | Zip: | State:<br>IL | Zip:<br>60187 |
| Phone: | Fax: | Phone:<br>630-407-5063 | Fax: |
| Shipping | | Contract Dates | |
| Payment Terms:<br>PER 50 ILCS 505/1 | FOB:<br>Destination | Contract Start Date (PO25):<br>Jan 1, 2024 | Contract End Date (PO25):<br>Jan 31, 2025 |
| Contract Administrator (PO25): Joe Hamlin | | | |

## Purchase Requisition Line Details

| LN | Qty | UOM | Item Detail (Product #) | Description | FY | Company | AU | Acct Code | Sub-Accts/ Activity Code | Unit Price | Extension |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | 1 | EA | | Annual Hyland OnBase Software Assurance - Family Center, County Clerk, Coroner, Animal Control, Supervisor of Assessments 02/01/2024 - 01/31/2025 | FY24 | 1000 | 1110 | 53807 | | 38,704.38 | 38,704.38 |
| 2 | 1 | EA | | Annual ShareBase - Supervisor of Assessments 02/01/2024 - 01/31/2025 | FY24 | 1000 | 1110 | 53807 | | 1,706.67 | 1,706.67 |
| 3 | 1 | EA | | Annual CAPSYS Software Assurance - Family Center, Supervisor of Assessments, County Clerk, Treasurer 01/01/2024 - 12/31/2025 | FY24 | 1000 | 1110 | 53807 | | 9,281.59 | 9,281.59 |
| 4 | 1 | EA | | Annual DuPage County Site Visits and MagnumScan Proactive Watch - Supervisor of Assessments 01/01/2024 - 12/31/2025 | FY24 | 1000 | 1110 | 53807 | | 13,608.12 | 13,608.12 |

***FY is required, assure the correct FY is selected.*** Requisition Total $ 63,300.76

| *Comments* | |
|---|---|
| HEADER COMMENTS | Provide comments for P020 and P025. |
| SPECIAL INSTRUCTIONS | Provide comments for Buyer or Approver (not for P020 and P025). Comments will not appear on PO.<br>Please send PO to Sarah Godzicki & Joe Hamlin and copy both when emailing PO to vendor.<br><br>Please make First Invoice Allowed date 11/01/2023. |
| INTERNAL NOTES | Provide comments for department internal use (not for P020 and P025). Comments will not appear on PO. |
| APPROVALS | Department Head signature approval for procurements under $15,000. Procurement Officer Approval for ETSB. |

The following documents have been attached: ☐ W-9 ☑ Vendor Ethics Disclosure Statement