

Western Cass Fire Protection District Vendor Checklists

Onboarding

- Certificate of Liability Insurance (required if non-office work on-site)
- Certificate of Workers Compensation Insurance (not required if off-site work; optional if less than 5 employees and on-site work; however, \$_____ premium rate times each \$100 of pay equals \$_____ premium paid by District)
- Certificate of OSHA 10-Hour Safety Training Course (required if construction on site work)
- IRS Form W-9
- Contractor Confidentiality and Privacy Agreement (Form 730-0)
- Code of Conduct (first page of Form 500-1)
- Direct Deposit or Deposits Authorization (Form 836-3 or 836-4)
- Login Information, including passwords, for online accounts, as necessary for vendor to provide products or services to District:
 - Physical security systems, including closed circuit television cameras
 - Vendors/Merchants, e.g., IAMRESPONDING, workers compensation insurance company, etc.
 - Fleet fueling programs, e.g., WEX, MFA, etc.
 - Financial institutions, including for P-Cards and online credit/debit card processing
 - Utility companies, e.g., propane, natural gas, electricity, water/sewer, internet, etc.
 - Accounts for organizations providing resources and support, e.g., Missouri Buys (for disbursement of State grants), Missouri Association of FPDs, National Volunteer Fire Council, etc.
 - Record repositories, e.g., TEAMS sites
 - Social media, e.g., Facebook, Instagram, Twitter, website (both domain registrars and hosting platforms), Nixle, Everbridge, etc.
- As appropriate, notify the following of the District's engagement with Vendor if the Vendor will need to interface with the following:
 - Insurance agent
 - Media contacts
 - Financial institutions
 - Other agency and government officials

Western Cass Fire Protection District Vendor Checklists

- Organizations provided resources and support, e.g., Fire Fighters Association of Missouri, Missouri Association of FPDs, National Association of Emergency and Fire Officials, etc.
 - FPD Attorney, Auditor and other FPD retained professionals
 - Vendors/Merchants (change who is authorized to charge)
 - Utility companies (change who is authorized to make changes)
 - Labor organizations
 - Physical security monitoring company and locksmith
 - Dispatch agency
 - Other: _____
- As appropriate, receive the following items as necessary for vendor to provide products or services to District:
- Laptop
 - Pager, wireless telephone, scanner, and/or radio
 - P-Card, fleet fueling card, and/or telephone calling cards
 - Badge/ID and/or keys
 - Other: _____
- Physical books, files, binders, reports, financial statements, and manuals considered records, as necessary for vendor to provide products or services to District:
- Robert's Rules of Order (or whatever parliamentary law book is used)
 - Minutes binder(s) for the years: _____
 - Resolutions and Ordinances binder
 - Contracts, including any labor contracts
 - Reports, e.g., from IAMRESPONDING, Treasurer, Chief, committees, etc.
 - Financial statements and audit reports
 - State statutes and/or State Constitution
 - Photocopy of the Sales/Use Tax Exemption Letter
 - Files of lawsuits and other closed records, including any necessary personnel and/or recipient of services PI, PII, and/or PHI
- As appropriate, any possessed key District-related information (see attached list)
- Other: _____

Western Cass Fire Protection District Vendor Checklists

Key District-Related Information for Onboarding

- As appropriate:
 - Roster(s) with contact information for key personnel, e.g., Chief
 - FPD mailing address; telephone number; fire station address(es) and telephone number(s); dispatch address and telephone number; and website
 - FPD boundaries and master street address guides (Master Street Address Guides)
 - Census-type statistics, e.g., population; registered voters; average education, salary, housing values; square miles; zoning; water hydrant suppliers, ISO public protection classification; etc.
 - Statistics, e.g., number and types of calls for service; number of positions; budget; tax rate levy(ies) and ceilings; aggregate assessed valuations; etc.
 - Educational information, e.g., acronyms, definitions, dispatch protocols, etc.
 - List of mutual aid and interfacing agency(ies) and contacts for their corresponding official(s)
 - List of other city, county, special purpose district, state, and federal elected officials and contacts thereof
 - Contact information for:
 - Insurance agent
 - Media contacts
 - Financial institutions
 - Other agency and government officials including the Missouri Association of FPDs and National Association of Elected Fire Officials
 - Other directors, Secretary, and Treasurer
 - FPD Attorney and Auditor and other FPD retained professionals
 - Vendors/Merchants
 - Utility companies
 - Labor organizations
 - Physical security monitoring company and locksmith
 - Dispatch agency
 - Other: _____
 - Other: _____

Western Cass Fire Protection District Vendor Checklists

Offboarding

- Disable login Information, including passwords, for online accounts, that were necessary for vendor to provide products or services to District:
 - Physical security systems, including closed circuit television cameras
 - Vendors/Merchants, e.g., IAMRESPONDING, AutoZone, O'Reilly, workers compensation insurance company, etc.
 - Fleet fueling programs, e.g., WEX, MFA, etc.
 - Financial institutions, including for P-Cards and online credit/debit card processing
 - Utility companies, e.g., propane, natural gas, electricity, water/sewer, internet, etc.
 - Accounts for organizations providing resources and support, e.g., Missouri Buys (for disbursement of State grants), Missouri Association of FPDs, National Volunteer Fire Council, etc.
 - Record repositories, e.g., TEAMS sites
 - Social media, e.g., Facebook, Instagram, Twitter, website (both domain registrars and hosting platforms), Nixle, Everbridge, etc.
 - Other: _____

- As appropriate, notify the following of District's discontinued engagement with Vendor if the Vendor interfaced with the following:
 - Insurance agent
 - Media contacts
 - Financial institutions
 - Other agency and government officials
 - Organizations provided resources and support, e.g., Fire Fighters Association of Missouri, Missouri Association of FPDs, National Association of Emergency and Fire Officials, etc.
 - FPD Attorney and Auditor and other FPD retained professionals
 - Vendors/Merchants (change who is authorized to charge)
 - Utility companies (change who is authorized to make changes)
 - Labor organizations
 - Physical security monitoring company and locksmith
 - Dispatch agency
 - Other: _____

Western Cass Fire Protection District Vendor Checklists

As appropriate, receive the following items that were necessary for vendor to provide products or services to District:

- Laptop
- Pager, wireless telephone, scanner, and/or radio
- P-Card, fleet fueling card, and/or telephone calling cards
- Badge/ID and/or keys
- Other: _____

Physical books, files, binders, reports, financial statements, and manuals considered records, that were necessary for vendor to provide products or services to District:

- Robert's Rules of Order (or whatever parliamentary law book is used)
- Minutes binder(s) for the years: _____
- Resolutions and Ordinances binder
- Contracts, including any labor contracts
- Reports, e.g., from IAMRESPONDING, Xero, Treasurer, Chief, committees, etc.
- Financial statements and audit reports
- State statutes and/or State Constitution
- Photocopy of the Sales/Use Tax Exemption Letter
- Files of lawsuits and other closed records, including personnel and/or recipient of services PI, PII, and/or PHI
- Other: _____

Other: _____

Western Cass Fire Protection District
Vendor Checklists

**DO NOT PRINT THIS
PAGE**

REVISION HISTORY

Revision Date	Author	Revision Details
March 30, 2022	Monte Olsen	Initial version