

CONTRACT PROCESS

Contract Document Flow

STEP 1	✓ Vendor - Dept works with vendor/doesn't sign yet
STEP 2	✓ Legal - Legal reviews contract, signs off
STEP 3	✓ Vendor - Vendor executes after legal sign off
STEP 4	✓ Department - Signs/executes final contract
STEP 5	✓ Procurement - Obtains copy of fully executed contract
STEP 6	✓ Legal - Receives final executed copy from procurement

GET/DO THIS	CHECK FOR THESE
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D E P T	<p>Is Vendor set up in Payment Works with Vendor ID? *** If yes, proceed *** If not, send Payment Works INVITE to vendor *** If unsure contact AccountsPayable@UHCL.edu for assistance</p> <p>Obtain current quote/proposal: *** If for goods *** If quote has vendor T&C's</p> <p>If >\$15k, show procurement method: *** Sole *** Emergency *** Co-op *** Bid *** \$15K to 25K *** Above \$25K</p> <p>If for services, fill out SPA *** Is it a Speaker? *** Is it a Performer?</p> <p>If for services, obtain COI or waiver of COI If legal review required, fill out OCA coversheet</p>	<p>Quote must be current (not older than 30 days) Check for terms & conditions (T&C's) Send Standard Contract Addendum (SCA) to vendor to sign</p> <p>Must be a justifiable sole source Submit ER acquisition form & notify DBA & Procurement Enter coop information on the requisition</p> <p>Informal bid, contact procurement Formal bid, contact procurement Standard Purchasing Agreement (SPA) Use Speaker Agreement https://www.uhcl.edu/about/administrative-offices/procurement-contracts/contracts Use Performer Agreement https://www.uhcl.edu/about/administrative-offices/procurement-contracts/contracts Certificate Of Insurance requirements are on SPA</p>
	<p>Check for required secondary approvals... based on what you're buying, or fund source if grant-based</p>	<p>OIT, OSP, FMC, MARCOMM - BRAND GUIDE, AFFINITY LICENSING</p>
P R O C U R E	<p>Requisition Secondary departmental approval needed? Account code correct? Category code correct? Requisition details present? *** Term dates *** Vendor information *** Department contact *** Delivery information</p> <p>Is backup documentation attached? If for goods, shipping & handling, freight shown? Gets risk management approval</p>	<p>Brand guide, OIT, OSP, FMC Check account list for fund code restrictions Check commodity code list</p> <p>For contracts, licenses, subscriptions, etc. Contact name, phone and email Contact name, phone and email Contact person</p> <p>Quote, SCA or SPA, COI, Procurement Method, Information Security Checklist</p> <p>Show shipping on a separate line if using ledger 1 funds If agreements/ contracts have insurance language</p>
U H S L E	<p>Office of the General Counsel /Contract Administration Reviews and Looks for the following: OCA Coversheet *** If contract >\$50k *** If contract >\$100k for construction *** Vendor will not sign SCA or SPA</p> <p>OCA Coversheet must have *** Contact information *** Description of work *** Amount/scope of work *** Cost center *** Risk Management approval or comments *** Begin & end date *** Initials under certification lines *** Check yes or no for RUSH *** Authorized signatures</p> <p>Must provide Procurement Method Backup documentation For Amendments</p>	<p>Procurement must submit to OGC for review</p> <p>UHS facilities reviews construction contracts Nonstandard contracts include standard forms [SPA, SCA, etc.] with revisions</p> <p>Sole Source, Emergency Justification, COOP, Bid (if applicable), all in RFA form related MOU's, Affiliation & Inter-Agency Agreements, Contracts, T&C's, anything linked, etc Amendment submissions must include original agreement and all preceding amendments</p>

1 Services: Any intangible experience