

University of Houston  Clear Lake  
TRAINING GUIDE for STANDARD AGREEMENTS

**The UHCL signature on the contract must be that of either the President, the Senior Vice President for Academic Affairs & Provost or the Vice President for Administration and Finance.**

**The contract should be sent unsigned to the vendor.** If the vendor returns the contract electronically, it must be legible. If there is ANY doubt as to whether the document is legible, forward it to Contracts Administration for verification BEFORE UHCL signatures are obtained.

Any last-minute handwritten changes to the business terms of the contract (e.g., dates or price) must be initialed by all signers of the contract. Any changes to the legal terms of the contract must be sent to Contract Administration to be reviewed by Office of General Counsel (OGC).

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1. Determine which contract should be used for the service:
  - Performer agreement (Use for performing artists such as musicians, DJs, dancers, etc.)
  - Speaker agreement (Use for speakers for workshops or any time the service is a presentation only.)
  - Standard Purchasing Agreement (Use for all other services provided **TO** UHCL.)
  - Services agreement (Use for services provided **BY** UHCL.) **See Completing the Services Agreement document before proceeding.**
  
2. Print out the agreement from the [Contracts](#) web page. Read the agreement to familiarize yourself with the terms in case your vendor has questions. Contact the vendor to request a quote for the goods and/or services to be provided. During that conversation, verify the following information:
  - The vendor is willing to use UHCL's standard agreement. If the vendor will not agree to use UHCL's standard agreement, see *Training Guide for Non-Standard Agreements*.
  - Legal name of vendor
  - Address of vendor, including city, state & zip code
  - Phone number of vendor
  - Email address of vendor
  - Any other information in the contract that must be agreed upon such as number of days written notice needed to terminate the contract, any other parties that must receive notice of changes to the contract, location at which the services will be performed, set-up time, etc.

**If you are using the Standard Purchasing Agreement - be sure to inform the vendor of the insurance requirements set out in Section 10** of that agreement so that the vendor can be fully aware of all costs they may have to incur as they prepare the quote for the requested goods and services.

**It is always in the best interests of the University to acquire the proof of insurance required by the contract. However, if the vendor states that they cannot or will not provide the required insurance,** use the Insurance Waiver Request Form on the [Contracts](#) webpage to request a waiver for that contract. If the waiver is granted, you can proceed to the next step. If the waiver is denied, contact Contract Administration for options.

3. While waiting to receive the quote:
  - Verify PeopleSoft vendor ID number - Run the UHS\_AP\_SEARCH\_FOR\_VENDORS query in PeopleSoft to determine if the vendor is set up as a vendor in the system.
  - If the vendor is found in PeopleSoft, be sure that the name and address is the same as the vendor provided. If the correct information is not found, the vendor must update the account. Once the vendor's name and address are verified as correct in PeopleSoft, make note of the vendor number since it will be needed to process the contract requisition.
  - If the vendor is not found in PeopleSoft, the vendor must be setup. Send the vendor an invitation through Payment Works to set up a new account.
4. Once the quote is received:
  - Is the amount of the quote more than \$15,000? If it is believed that the vendor chosen to provide the required services is the ONLY vendor that can provide those services, the Sole Source Purchase Justification form should be completed and submitted to UHCL Contract Administration PRIOR to completing the contract. If it is determined that the purchase is a sole source, the approved form will be returned to the department. The approved form should be uploaded with the contract. The link to the Sole Source Purchase Justification form is on the [Contracts](#) webpage under Miscellaneous Forms. If UHCL Contract Administration determines that there is more than one vendor that can provide the requested services, and the vendor is not a part of a cooperative contract, the service will be put out for bid.
  - Does the quote show that Texas sales tax is included? If so, a tax exempt certificate should be submitted to the vendor and a revised quote received with the Texas sales tax removed. The tax exempt certificate can be obtained by sending an email which includes the name and address of the vendor to [UHCLProcurement@uhcl.edu](mailto:UHCLProcurement@uhcl.edu). The certificate will be sent to the requestor, not the vendor.
5. Once this information and documentation has been gathered, complete the contract, making sure that all the information required by that agreement has been entered. Once the information has been entered into the form, send the unsigned contract to the vendor. After receiving the signed contract back from the vendor, attach required internal documentation to the contract (listed below) and acquire the necessary UHCL signature(s).
  - Contract requisition coversheet (if encumbering funds) and/or revenue contract coversheet (if applicable)
  - Certificate of Insurance or Insurance Waiver approved by UHCL Risk Management (if using Standard Purchasing Agreement)
  - Food Service Waiver if contract is for on-campus catering over \$100
  - President/Vice President approval if alcohol is to be served
  - Sole Source Purchase Justification form pre-approved by Procurement if the amount of the contract is more than \$15,000
6. If no encumbrance is required (zero dollar and services/revenue contracts), submit a pdf document of the fully executed contract with all supporting documentation to [UHCLProcurement@uhcl.edu](mailto:UHCLProcurement@uhcl.edu).
7. To process an encumbrance, follow the *Instructions for **Entering Contract Requisitions into Workflow*** and process a contract requisition. Department should keep the original contract documents.
8. Department is responsible for sending the fully-executed contract to the vendor.

**If you have questions, please call Contract Administration at Ext. 2150.**

**All forms are available on the [Contract Administration](#) web page.**