



Please visit the [Forms and Guides](#) page on the Contract and Procurement website for links to information referenced below. For questions, send an email to CNP@utsystem.edu.

SECTION 1: INFORMATION GATHERING

| DEPARTMENT INFORMATION | |
|---|--|
| Department: | |
| Department Contract Administrator (DCA) Name: | |
| DCA Phone Number: | |
| DCA Email Address: | |

| CONTRACT INFORMATION | |
|---|--|
| Preferred Effective Date: | |
| Proposed Dates of Service: | |
| Initial Term (# of years, months, or days): | |
| Renewal Term Options (how many): | |
| Initial Contract Cost: | |
| Cost for Each Option Period: | |
| TOTAL Cost of Contract: <i>(Initial + all Options):</i> | |
| Funding Type: <i>(UTS Cost Center, Project, Institutional Funds or No Funding)</i> | |
| Cost Center or Project Number <i>(8 digits):</i> | |
| If Contract Modification, Previous BA#: | |

| VENDOR INFORMATION | |
|-----------------------|--|
| Vendor Name: | |
| PeopleSoft Vendor ID: | |
| Vendor Address: | |
| Vendor Contact Name: | |
| Vendor Phone Number: | |
| Vendor Email Address: | |

SECTION 2: DATA AND DOCUMENT GATHERING

Required documentation should be gathered in advance of beginning the Request process in CCARS. The Request form can be **saved** until all documents are provided and the form can be moved to a submitted status.

Click on the appropriate Checklist link:

- [CHECKLIST A](#) – Contract (Purchase is **NOT** for Technology and /or Vendor **will not** have access to UT data)
- [CHECKLIST B](#) – Contract (Purchase of Technology and/or where Vendor **will** have access to UT data)
- [CHECKLIST C](#) – Contract (Memorandum of Understanding (MOU))
- [CHECKLIST D](#) – Purchase Order (Purchase Order is **NOT** for Technology and /or Vendor **will not** have access to UT data)
- [CHECKLIST E](#) – Purchase Order (Purchase Order for Technology and/or where Vendor **will** have access to UT data)
- [CHECKLIST F](#) – Supporting Documents (May be required based on specifics of the procurement method and/or contract requirements)

| CHECKLIST A - Contract (Purchase is NOT for Technology and /or Vendor will not have access to UT data) | |
|---|---|
| 1 | If the vendor is not set up in PeopleSoft, send an invitation to the vendor via PaymentWorks |
| 2 | Exclusive Acquisition Justification (EAJ) required if purchase is over \$15,000 and not justified through bidding process (formal, informal, GPO) |
| 3 | Obtain department head approval to initiate the procurement process (required – may be an email or initialed agreement) |
| 4 | If over \$100k, items needed: |
| | Hub Subcontracting Plan |
| 5 | If over \$250k, items needed: |
| | Completed Risk Assessment |
| | Completed Contract Monitoring Plan |
| 6 | If over \$1M, items needed: |
| | OGC Approval of Terms and Conditions |
| | Form 1295 |
| | Signed Nepotism Form |
| 7 | If over \$10M or an EAJ over \$1M, Provide an attestation letter |
| 8 | Review Supporting Documents to verify additional needed documentation (Checklist F) |
| 9 | Submit a Request in CCARS (REQ#_____) |

Required documentation must be provided when submitting a Request in CCARS. The form may be saved until all documents are provided, then the form can advance to a submitted status.

| CHECKLIST B - Contract (Purchase of Technology and/or where Vendor will have access to UT data) | |
|--|--|
| 1 | Complete Privacy and Security Questionnaire (PSQ) and obtain report |
| 2 | Request Voluntary Product Accessibility Template (VPAT 2.4 Rev 508) from the vendor |
| 3 | Submit Accessibility Intake Form with VPAT to ITPurchasing@utsystem.edu and obtain results and/or exception |
| 4 | Submit ISOTRAQ information and obtain report |
| 5 | Review and note TX-RAMP status |
| 1 | If the vendor is not set up in PeopleSoft, send an invitation to the vendor via PaymentWorks |
| 2 | Exclusive Acquisition Justification (EAJ) required if purchase is over \$15,000 and not justified through bidding process (formal, informal, GPO) |
| 3 | Obtain department head approval to initiate the procurement process (required – may be an email or initialed agreement) |
| 4 | If over \$100k, items needed: |
| | Hub Subcontracting Plan |
| 5 | If over \$250k, items needed: |
| | Completed Risk Assessment |
| | Completed Contract Monitoring Plan |
| 6 | If over \$1M, items needed: |
| | OGC Approval of Terms and Conditions |
| | Form 1295 |
| | Signed Nepotism Form |
| 7 | If over \$10M or an EAJ over \$1M, Provide an attestation letter |
| 8 | Review Supporting Documents to verify additional needed documentation (Checklist F) |
| 9 | Submit a Request in CCARS (REQ#_____) |

- Required documentation must be provided when submitting a Request in CCARS. The form may be saved until all documents are provided, then the form can advance to a submitted status.
- For VPATs, there is a general exception signed by the EVC for Business Affairs that VPATs are not needed if the purchase is for UT System use only or if the total value is under \$25k

| CHECKLIST C - Contract (Memorandum of Understanding (MOU)) | | |
|---|---|--|
| 1 | If the vendor is not set up in PeopleSoft, send an invitation to the vendor via PaymentWorks | |
| 2 | Request OGC draft MOU | |
| 3 | Obtain Office of General Counsel (OGC) approval “as to form” in writing if not drafted by OGC | |
| 4 | Obtain department head approval to initiate the MOU process (required – may be an email or initialed agreement) | |
| 5 | Obtain vendor signature | |
| 6 | Submit a Request in CCARS (REQ#_____) | |

Required documentation must be provided when submitting a Request in CCARS. The form may be saved until all documents are provided, then the form can advance to a submitted status.

| CHECKLIST D - Purchase Order (PO) (Purchase Order is NOT for Technology and /or Vendor will not have access to UT data) | | |
|--|---|--|
| 1 | If the vendor is not set up in PeopleSoft, send an invitation to the vendor via PaymentWorks | |
| 2 | Obtain quote within 30 days of purchase | |
| 3 | Obtain department head approval to initiate the procurement process | |
| 4 | Exclusive Acquisition Justification (EAJ) required if purchase is over \$15,000 and not justified through bidding process (formal, informal, GPO) | |
| 5 | Review Supporting Documents to verify additional needed documentation (Checklist F) | |
| 6 | Create PO Requisition in PeopleSoft (PO will be auto generated if <\$15k) | |
| 7 | Email supporting documentation to CNP@utsystem.edu (review Checklist F) | |
| 8 | Email completed and approved PO to vendor | |
| 9 | PO accepted by vendor | |

Additional Information:

- POs can be used for companies (incorporated, LLCs, etc.) but not for individuals. To contract with individuals, use the Authorization of Professional Services form or a vendor contract.
- POs cannot be used for food and beverage purchases.
- Required documentation must be provided when submitting a Request in CCARS. The form may be saved until all documents are provided, then the form can advance to a submitted status.

| CHECKLIST E – Purchase Order (PO) (Purchase Order for Technology and/or where Vendor will have access to UT data) | |
|--|--|
| 1 | Complete Privacy and Security Questionnaire (PSQ) and obtain report |
| 2 | Request Voluntary Product Accessibility Template (VPAT 2.4 Rev 508) from the vendor |
| 3 | Submit Accessibility Intake Form with VPAT to ITPurchasing@utsystem.edu and obtain results and/or exception |
| 4 | Submit ISOTRAQ information and obtain approval |
| 5 | Review and note TX-RAMP status |
| 6 | If the vendor is not set up in PeopleSoft, send an invitation to the vendor via PaymentWorks |
| 7 | Exclusive Acquisition Justification (EAJ) required if purchase is over \$15,000 and not justified through bidding process (formal, informal, GPO) |
| 8 | Obtain department head approval to initiate the procurement process |
| 9 | Obtain quote within 30 days of purchase |
| 10 | Review Supporting Documents to verify additional needed documentation (Checklist F) |
| 11 | Email supporting documentation to CNP@utsystem.edu (review Checklist F) |
| 12 | Create PO Requisition in PeopleSoft (PO will be auto generated if <\$15k) |
| 13 | Email completed and approved PO to vendor |
| 14 | PO Accepted by vendor |

Additional Information:

- POs can be used for companies (incorporated, LLCs, etc.) but not for individuals. To contract with individuals, use the Authorization of Professional Services form or a vendor contract.
- POs cannot be used for food and beverage purchases.
- For VPATs, there is a general exception signed by the EVC for Business Affairs that VPATs are not needed if the purchase is for UT System use only or if the total value is under \$25k.
- Required documentation must be provided when submitting a Request in CCARS. The form may be saved until all documents are provided, then the form can advance to a submitted status.

| CHECKLIST F – Supporting Documents (May be required based on specifics of the procurement method and contract requirements) | |
|--|--|
| 1 | Certificate of Insurance |
| 2 | Partially executed agreements (I.e., MOUs,) |
| 3 | Proposals, quotes, Software Licensing Agreements, etc. |
| 4 | Additional Approvals (Privacy, Insurance, etc.) |
| 5 | Non-disclosure agreement |
| 6 | Scope of Work |
| 7 | Concurrence Form |
| 8 | |
| 9 | |
| 10 | |
| 11 | |
| 12 | |
| 13 | |