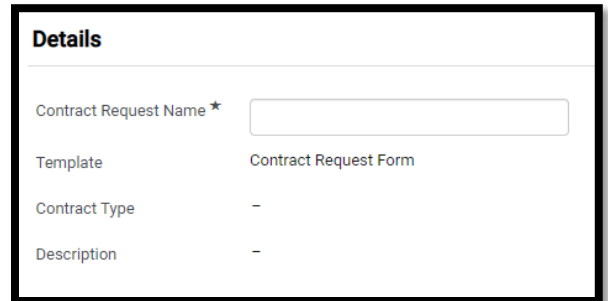


OIA: Contracts+ Helpful Tips for Contract Requests

Name

- To help differentiate contract requests, please use a clear name
- Ideal request names include the facility name, program name, subject, type of agreement.
 - Ex. ABC Facility_EEAA
 - Ex. SON_ABC Facility_PA
 - Ex. XYZ Facility_Counseling_CEP_EEAA

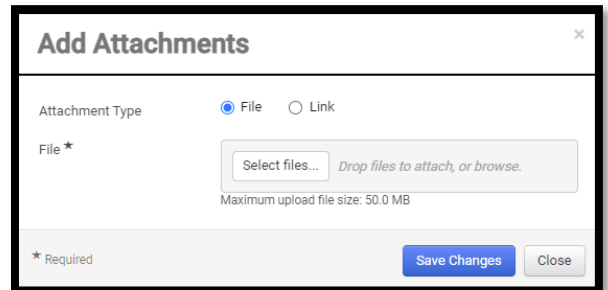


The 'Details' form contains the following fields:

Contract Request Name *	<input type="text"/>
Template	Contract Request Form
Contract Type	-
Description	-

Attachments

- Include all attachments required for the agreement including but not limited to the agreement, cover sheet, routing form, contract administrator certification form, etc.
 - Note: Include the complete agreement (not just the signed page)
 - Note: If executed by the second party prior to submission, please confirm the date and signature are appropriately completed
 - Note: Remove any blank pages from the attachments if not part of the agreement
- Confirm agreement and additional attachments are in separate documents




The 'Add Attachments' form includes:

- Attachment Type: File Link
- File *: Drop files to attach, or browse.
- Maximum upload file size: 50.0 MB
- * Required
- Buttons: Save Changes, Close

Work Group

- If the request is for an educational agreement, select Academic Affairs as the Work Group



The Work Group dropdown shows:

- Work Group *
- Academic Affairs
- Close button (X)
- Search icon (Q)

Type of Request

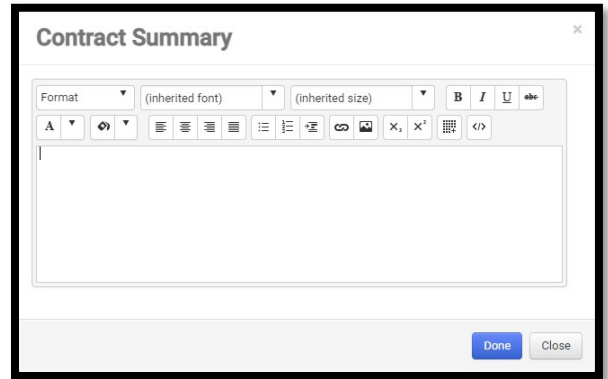
- Provide the contract number for requests that are Amendments or Renewals. Add the original agreement to the attachments.
 - Ex. DOHA-AFFISOM-XXX-XXXX or ACADAFF-AFFIL-XXXXXX



The screenshot shows a dropdown menu titled "Type of Request" with three options: "New Contract", "Amendment", and "Renewal". The "New Contract" option is currently selected and highlighted in blue.

Summary

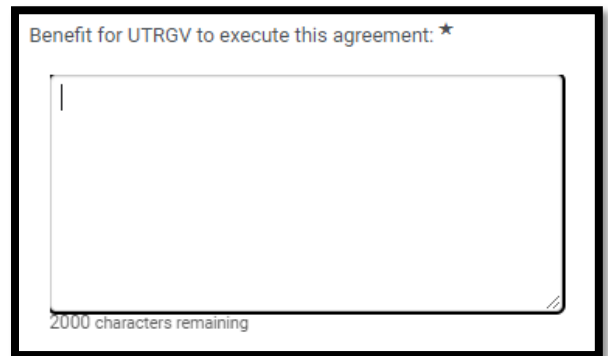
- Add a brief description of the agreement
 - Ex. Standard educational affiliation agreement between UTRGV and XYZ
 - Ex. This is a Program Agreement between Department of XYZ and the identified agency for the provision of XYZ services by student interns



The screenshot shows a text editor window titled "Contract Summary". It features a rich text toolbar with options for font style, size, bold, italic, underline, and text color. The main text area is currently empty, and there are "Done" and "Close" buttons at the bottom right.

Benefit for UTRGV to execute this agreement

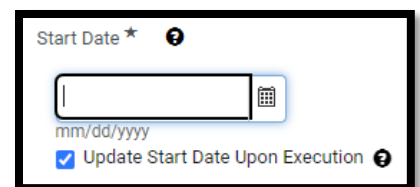
- Add a brief description of the benefit of the agreement
 - Ex. To enhance student clinical education
 - Ex. This agreement allows UTRGV students to engage with the community by providing XYZ services to enhance student education



The screenshot shows a text area titled "Benefit for UTRGV to execute this agreement". The text area is empty, and a "2000 characters remaining" indicator is visible at the bottom left.

Start Date

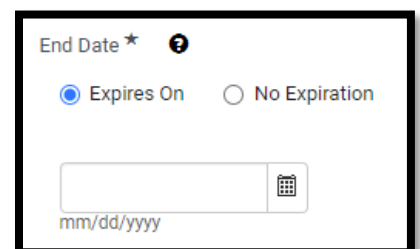
- Enter the start date stated in the agreement
- Depending on the language in the agreement, some agreements will require to check the "Update Start Date Upon Execution" option



The screenshot shows a "Start Date" field with a calendar icon. Below the field is a checkbox labeled "Update Start Date Upon Execution" which is checked. The format "mm/dd/yyyy" is indicated below the field.

End Date

- Enter the end date stated in the agreement
 - Note: some agreements state an initial term with automatic or written renewals



The screenshot shows an "End Date" field with a calendar icon. Above the field are two radio buttons: "Expires On" (selected) and "No Expiration". Below the field is the format "mm/dd/yyyy".

Estimated total Contract Value

- Standard educational agreements are “0”, please double check the language for total contract value

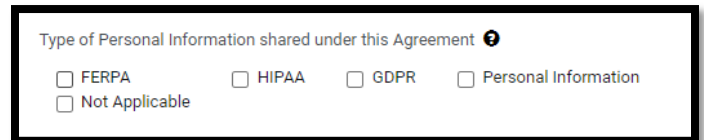


Estimated total Contract Value * ⓘ

0.00

Types of Personal Information shared under this Agreement

- Select “Not Applicable”
 - If the agreement is a standard form with substantive changes or a non-standard form, legal will review and incorporate the language as needed



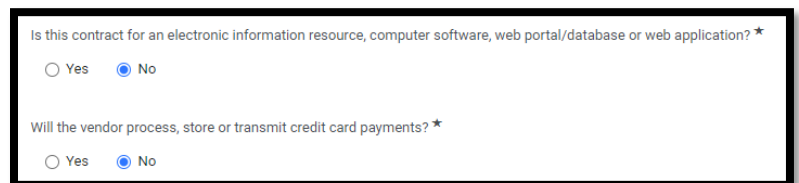
Type of Personal Information shared under this Agreement ⓘ

FERPA HIPAA GDPR Personal Information

Not Applicable

Electronic Information/Computer Software/Web Database/Web Application/CC Payments

- Clinical education contracts are “No,” please double check the language



Is this contract for an electronic information resource, computer software, web portal/database or web application? *

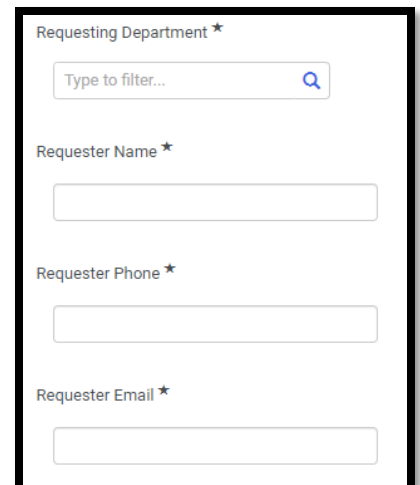
Yes No

Will the vendor process, store or transmit credit card payments? *

Yes No

Requesting Department

- This should include the UTRGV requestor or contact



Requesting Department *

Type to filter... 🔍

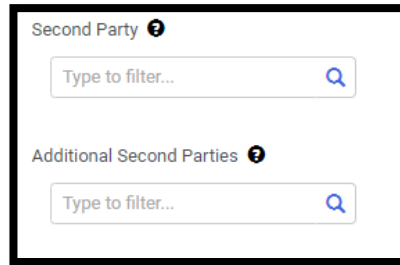
Requester Name *

Requester Phone *

Requester Email *

Second Party

- This should include the second party contact
- Check if the facility is already listed in the search
- If the second party is not listed, leave this section blank and add the information to the required section



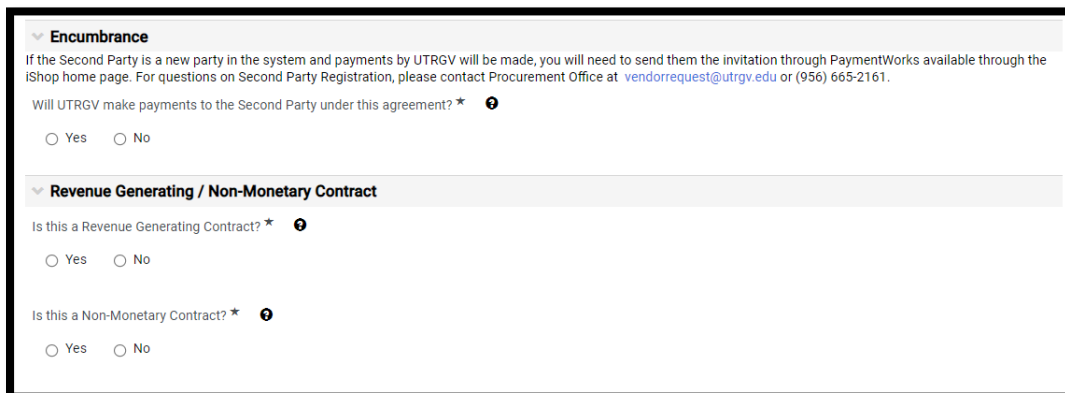
Is this a new Second Party?

- If the second party was not found in the search, select “yes”



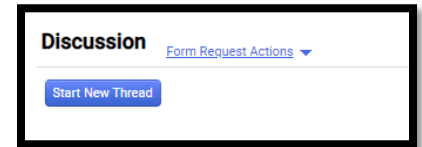
Encumbrance/Revenue Generating/Non-Monetary Contract

- Standard educational agreements are “No” for making payments to the Second Party and Revenue Generating Contract questions, please double check the language
- If there is no money exchange stated in the agreement, select “Yes” for “Is this a Non-Monetary Contract?”
 - Note: *OIA is not responsible for any tracking or confirmation of money exchange outlined in the agreement. These responsibilities fall within the requesting department.*



Discussion

- If the agreement has undergone UTRGV legal review or requires UTRGV legal review, note this in the discussion section
- If additional comments are needed, they should also be included in the discussion section
 - Ex. Departmental approval or information



Review and Complete

- Confirm all sections are all complete before completing
 - Note: if the request is complete, the progress will show green check marks for each section

The screenshot shows a 'Review and Complete' section with a warning message: 'All sections with required fields must be complete before you can complete your request'. Below is a table showing the progress of various sections.

Section	Progress
Instructions	✔ No Required fields
Details	✔ No Required fields
Attachments	✔ No Required fields
Questions	⊘ Incomplete

Contract Request Workflow

- This section will update with the location of the agreement in the workflow

