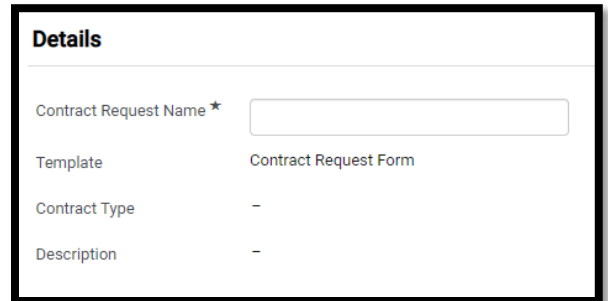**The University of Texas Rio Grande Valley**

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
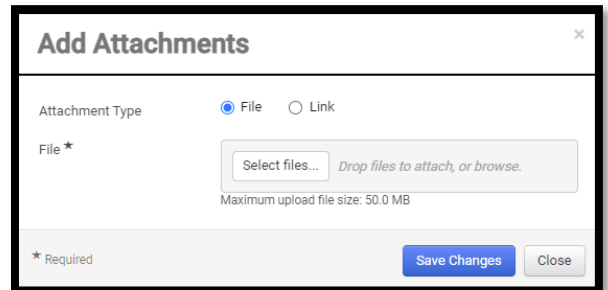 - Ex. XYZ Facility_Counseling_CEP_EEAA

Details

Contract Request Name *

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

Add Attachments ×

Attachment Type   ● File   ○ Link

File *   Select files...   Drop files to attach, or browse.

Maximum upload file size: 50.0 MB

* Required   Save Changes   Close

Work Group

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

Work Group * ❓

Academic Affairs   ✕   🔍

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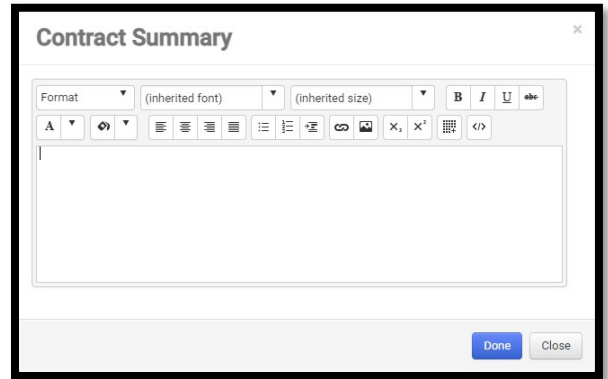Updated: January 2023

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
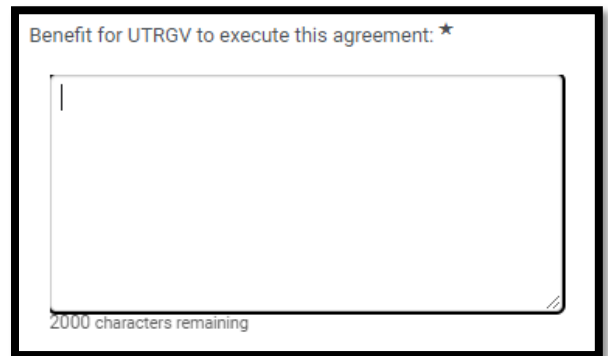

Summary

- 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

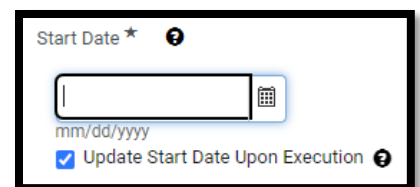**Benefit for UTRGV to execute this agreement**

- 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
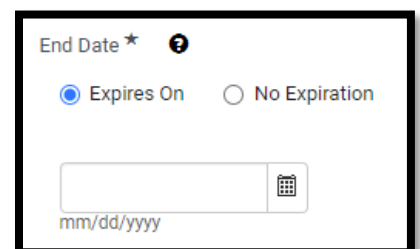

Start Date

- 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

End Date

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

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Estimated total Contract Value

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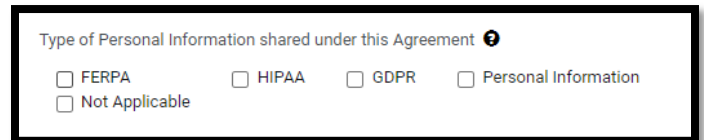

Types of Personal Information shared under this Agreement

- 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
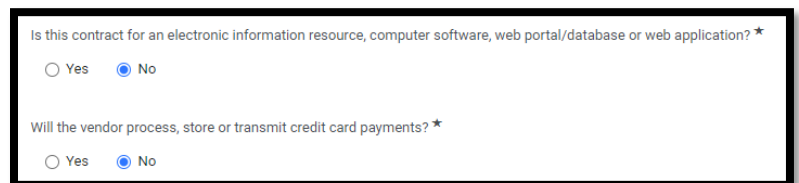

Electronic Information/Computer Software/Web Database/Web Application/CC Payments
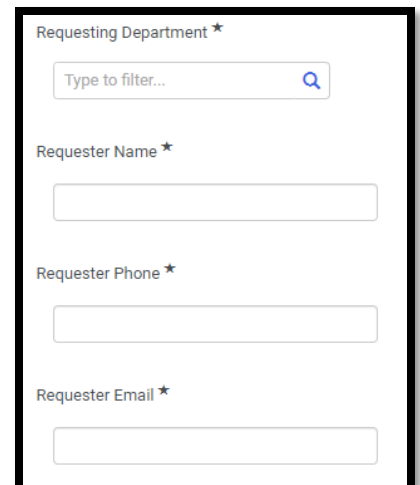
- Clinical education contracts are "No," please double check the language

Requesting Department

- This should include the UTRGV requestor or contact

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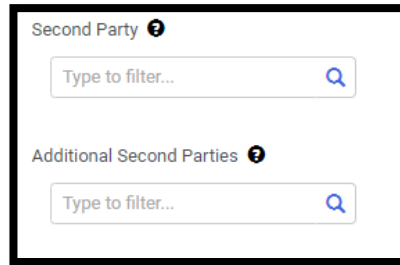
Second Party

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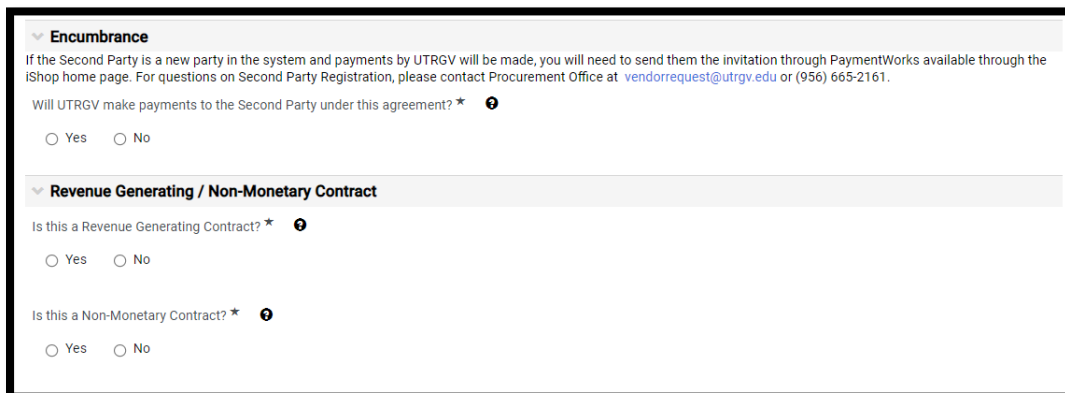- If the second party is not listed, leave this section blank and add the information to the required section

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.*

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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
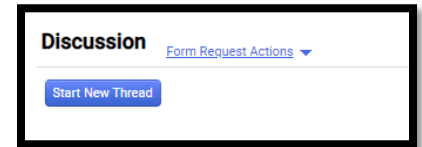
Review and Complete

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

Contract Request Workflow

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

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