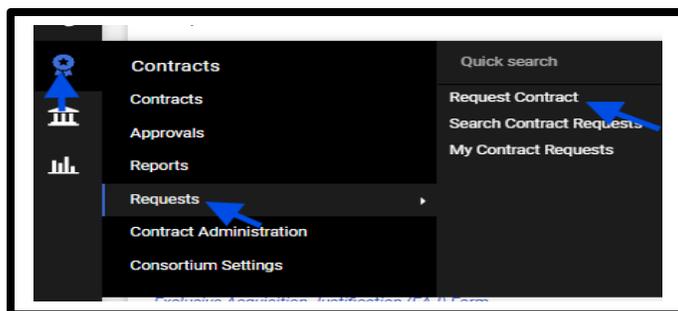


## CIA: Contracts+ Contract Requests

[Contract requests will be done through iShop UTRGV located in PeopleSoft Application in myUTRGV](#)

### Contract Request

- Click on the Contracts Module Icon go to Requests and then click on Request Contract



### Create Contract Request Name

- To help differentiate contract requests, please use a clear name
- Ideal request names include the PI Name, Other Party Name, type of agreement.
  - Ex. Doe\_ABC Institution\_MTA
  - Ex. ABC\_Institution\_CDA
  - Dr.Doe\_ABC Company\_Cooperative Agreement

### Attachments

- Include all attachments required for the agreement including but not limited to **the Agreement, Chair and ADR approval**, and other supporting documents.
  - Note: Include the complete agreement (not just the signed page)
  - Confirm agreement and additional attachments are in separate documents

### Work Group

- If the request is for a research focused agreement, select Research Contracts & Industry Agreements

## Type of Request

- Select New Contract for all new agreements
- Provide the contract number for requests that are Amendments or Renewals. Add the original agreement to the attachments.
  - Ex. RESRCH-IRBRA-XXX-XXXX or RESEARCH-MASTER-XXXXXX



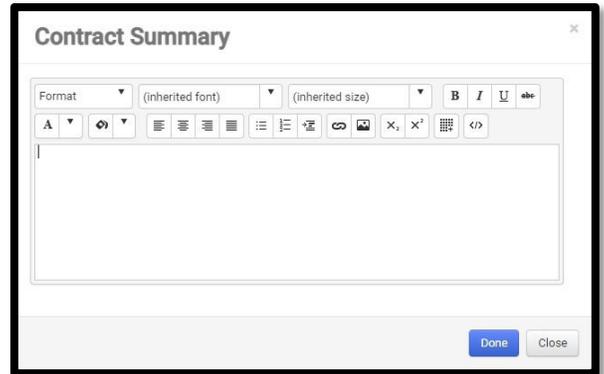
Type of Request \*

New Contract ▼

New Contract  
Amendment  
Renewal

## Summary

- Add a brief description of the agreement
  - Ex. Non-Disclosure agreement between UTRGV and XYZ
  - Ex. MOU between UTRGV and XYZ for Sponsored Project
  - Ex. This is a Collaborative Agreement between XYZ Institute to identify ABC populations.



Contract Summary

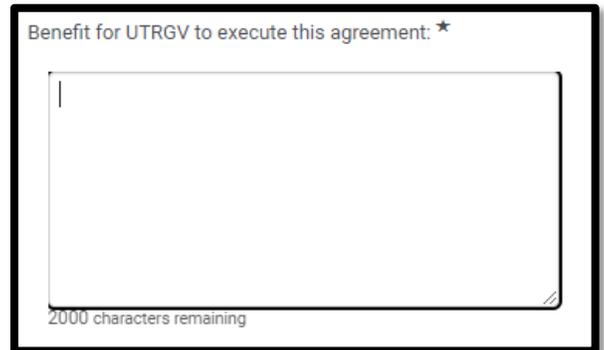
Format (inherited font) (inherited size) B I U abc

A [Rich Text Editor Icons]

Done Close

## 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 to obtain data for research purposes



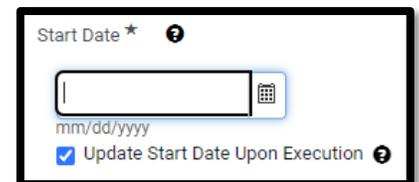
Benefit for UTRGV to execute this agreement: \*

[Text Area]

2000 characters remaining

## Start Date

- Insert the start date of the contract and check off the box if Start date should be updated upon Execution.



Start Date \* ?

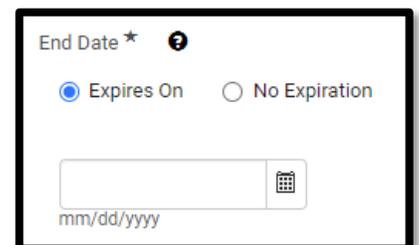
[Date Picker]

mm/dd/yyyy

Update Start Date Upon Execution ?

## End Date

- Select the Expires On if there is an End Date and select the date by clicking on the calendar. If there is no expiration date, click on No Expiration



End Date \* ?

Expires On  No Expiration

[Date Picker]

mm/dd/yyyy

### Estimated total Contract Value

- Non-Funded agreements are “0”, please double check the language for total contract value
- Contract Value, insert the total dollar amount over the life of the contract if applicable.

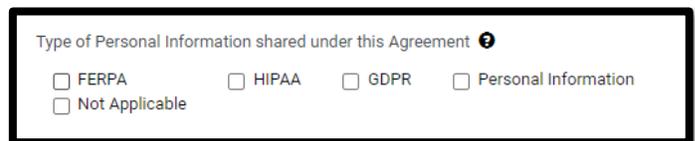


Estimated total Contract Value \* ?

0.00

### Types of Personal Information shared under this Agreement

- Select whether UTRGV will share any information subject to FERPA, HIPAA, GDPR (European General Data Protection Regulation) or Personally Identifiable information, if any, select “Not Applicable”.



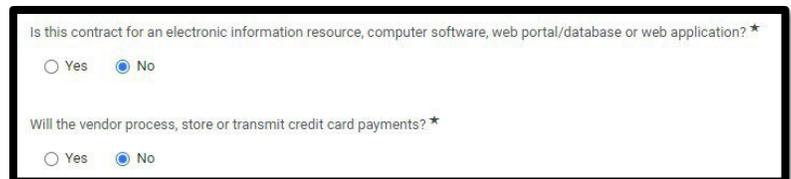
Type of Personal Information shared under this Agreement ?

FERPA     HIPAA     GDPR     Personal Information

Not Applicable

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

- If the contract is for a Computer Software or Web Application, select “Yes”. Answering Yes, it routes the request to IT for review and approval. Otherwise, select “No”.



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

### Chair & Associate Dean of Research Approvals

- Chair and ADR approval is required for agreements with no monetary value. Documentation may be provided via email correspondence and uploaded to the Contract+ file under Attachment section



Have all the approvals required at your Department/Division level to enter into this Agreement been obtained? If yes, please attach supporting documentation. \*

Yes     No

### ARGO

- Agreements that are part of proposals will require an ARGO ID. If no ARGO number is associated, select “No.”



Does this project have an associated Argo Number? \* ?

Yes     No

### International Entities

- Select whether UTRGV will share any information with international entity Answering “Yes”, it routes the request to Export Control for review and approval. Otherwise, select No.

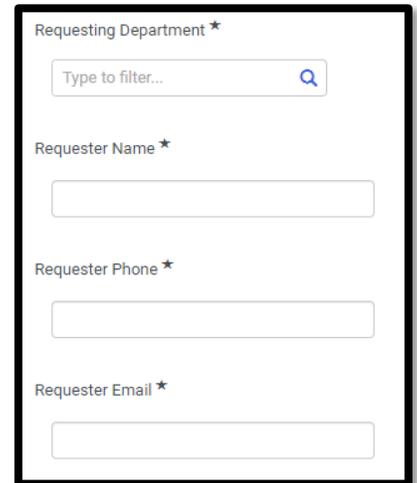


Does this contract involve activity with individuals or organizations outside the country? \*

Yes  No

### Requesting Department

- This should include the **UTRGV** Principle Investigator information.



Requesting Department \*

Type to filter... 

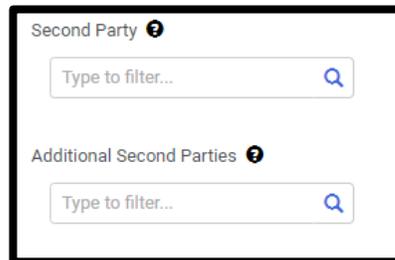
Requester Name \*

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



Second Party 

Type to filter... 

Additional Second Parties 

Type to filter... 



Second Party Contact Name \*

Second Party Contact Phone \*

Second Party Contact Email \*

**Is this a new Second Party?**

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

Add Second Party Address, Contact Name, Phone number and email address.

Is this a new Second Party? \*

Yes  No

Second Party \*

Second Party Address \*

2000 characters remaining

**Encumbrance/Revenue Generating/Non-Monetary Contract**

- Standard research 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: *CIA is not responsible for any tracking or confirmation of money exchange outlined in the agreement.*

**Encumbrance**

If the Second Party is a new party in the system and payments by UTRGV will be made, you will need to send them the invitation through PaymentWorks available through the iShop home page. For questions on Second Party Registration, please contact Procurement Office at [vendorrequest@utrgv.edu](mailto:vendorrequest@utrgv.edu) or (956) 665-2161.

Will UTRGV make payments to the Second Party under this agreement? \* ⓘ

Yes  No

**Revenue Generating / Non-Monetary Contract**

Is this a Revenue Generating Contract? \* ⓘ

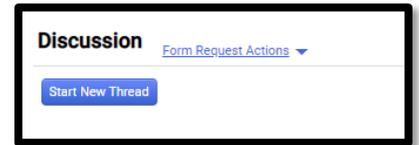
Yes  No

Is this a Non-Monetary Contract? \* ⓘ

Yes  No

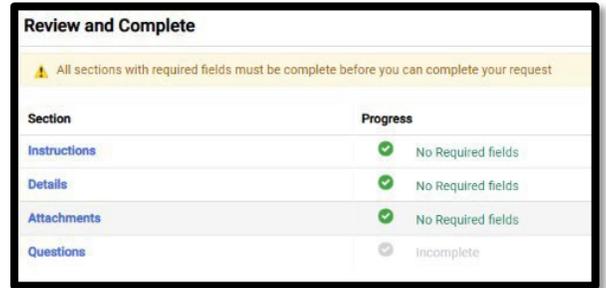
## Discussion

- If additional comments are needed, they should also be included in the discussion section
  - Ex. Departmental 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

