



Contract Liaison Procedures

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Applies to:

All Departments - UNT System Administration, UNT, UNT Health Fort Worth, and UNT Dallas

Purpose:

This document outlines key procedures for Contract Liaisons to follow in collaborating with the UNTS Office of Contract Administration (OCA) in contract managing at the department level and in assisting with business contract processing, routing, and administration for each contract initiated by the department. Effective practices will help ensure that the requirements of each of the department's contracts are satisfactorily performed; the responsibilities of both parties are properly discharged; and all UNT SYSTEM's financial, academic, and clinical interests are protected.

Definition(s):

- **Contract.** "Contract" means any written agreement that creates a binding obligation, financial or otherwise, for the University. Contracts include but are not limited to affiliation agreements, cooperative agreements, easements, grants, intellectual property agreements, interagency contracts, internship agreements, leases, letter agreements, letters of intent, licenses, loans, memoranda of understanding, nondisclosure agreements, professional services agreements, and purchase orders. Consider contracts as 1) documents that require payment for goods or services and contain terms and conditions (either listed on the document or indicated in a website reference) or 2) documents that require payment for goods or services and require signatures.
- **Contract Administration.** "Contract Administration" means all of the activities required to get a contract in place.
- **Contract Management.** "Contract Management" means all activities AFTER the contract is in place.
- **Deliverable.** "Deliverable" means a unit or increment of work required by the contract, including such items as goods, services, reports, or documents.
- **External Party.** "External Party" means the external contracting organization and includes but is not limited to federal, state and local agencies; nonprofit organizations; private businesses; partnerships; and individuals. Used interchangeably with the term "contracting organization", "contractor", and "vendor".
- **UNT SYSTEM ENTERPRISE.** Use of this term in this document means UNT System Administration, UNT, UNT Health Fort Worth, and UNT-Dallas.

Procedures:

- The UNTS Office of Contract Administration will oversee the management and administration of all UNT SYSTEM ENTERPRISE business contracts except research contracts or faculty or employment contracts.
- The specific nature and extent of the contract administration by the department will vary from contract to contract. It should be consistent with the complexity and level of risk of the contract, the term of the contract, and the dollar value, if applicable. Contract managing should start by developing a complete description of each party's duties and obligations, how these will be performed, and when they will be

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CONNECT: <https://myunt.sharepoint.com/sites/HSCFinanceWebsite/SitePages/Contract-Administration.aspx> 

<https://finance.untsystem.edu/contract-administration/index.php> 

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performed. The next step should be preparing a contract administration plan that cost effectively monitors and measures the performance of all parties.

- The Contract Liaison is responsible for ensuring that the processes and/or procedures detailed in [Regent Rule 3.9 Delegation of Authority for Contracts and Agreements](#)), the [UNTS Office of General Counsel \(OGC\) Contract Management Handbook](#), the [UNTS Procurement Guide](#), (at HSC) the [Policy 4.105 Contract Administration Compliance](#) and those listed below are followed:

Contract Administration

Board Approval

If required, working with your appropriate President Cabinet member to complete the current process for Board of Regents submissions for each contract with a total cost or monetary value 1) that exceeds \$5,000,000 in the current fiscal year or 2) that exceeds \$2,000,000 per year for a multi-year contract or meets the criteria of one of the exceptions listed in [Regents Rule 03.905](#) applies.

If applicable, notifying OCA when Board of Regents approval is granted and forwarding copy of the Board Briefing and Board Order to OCA.

Expenditure

See resource: [UNTS BUSINESS CONTRACT CHECKLIST for CLs](#) | [OGC Contract Checklist](#)

Addressing possible fiscal obligations and ensuring that the department has the necessary funding for expense contracts (consider maintenance fees, support, renewals, etc.) and following an appropriate Procurement Method.

For questions about Procurement Methods, contact a Strategic Sourcing Campus Liaison & Senior Strategic Sourcing Project Manager. See resource: [Strategic Sourcing webpage](#).

For assistance with acquiring HUB quotes, see resource: [Historically Underutilized Business](#).

Determining if a separate contract is needed in addition to a Purchase Order (PO), which is considered a contract.

See resource: [PO Terms & Conditions](#).

Ensuring that the contract is submitted to the University of North Texas System Business Support Services (BSS) electronically with a [ePro \(formerly UNTS Marketplace\)](#) requisition.

Working with the University of North Texas System Business Support Services (BSS) to ensure procurement guidelines have been met for all contracts related to a purchase. See resource: [Procurement Policy & Requirements](#).

If PCARD is selected as the payment method, follow all applicable PCard Program policies: [PCard Program](#)

Initiate

Identifying a need to provide or receive a good or service from a contracting organization or other outside party.

Serving as the point of contact for questions and disseminating the instructions regarding the work to the contracting organization.

See resource: [Contract Decision Flowchart](#).

Legal Review

Working with the [Office of General Counsel](#) to resolve legal issues.

All contracts must comply with State of Texas requirements, and adhere to the requirements of the Regents Rules and the applicable policies of the System and Campuses. See resource: [Contract Management Handbook](#).

Regents Rule 03.900 sets the rules governing legal review of contracts and agreements. All contracts must be approved as to form by OGC before execution, unless exempt. See the exemptions here: [Legal Review of Contracts | UNT System](#)

Negotiate

Asking the external contracting organization if digital signatures are acceptable for their business practices.

Coordinating negotiation of the business terms of the contract with the contracting organization, if necessary.

Contracts must comply with state contracting requirements.

Developing or reviewing the initial contract including a clear scope of work (outlining the expectations of the business arrangement) and completing requested information such as office/individual in Notice clause, effective dates, shipping/invoicing information, etc. / Utilizing a contract template.

Reviewing each contract and ensuring that UNT SYSTEM ENTERPRISE can perform the obligations set forth in the contract.

Submit

Clearly identifying the original contract when submitting amendments, renewals, extensions, and change orders.

Ensuring all appropriate documentation including but not limited to Statements of Work (SOW's), exhibits, attachments, and already acquired approvals (IT, OGC, BSC, Fair Market Value (FMV) analysis, etc.) is submitted with the contract.

Ensuring that the contract is not signed by the department or anyone that does not have appropriate contract signature authority.

If applicable, obtaining necessary department approvals prior to submitting the contract.

Preparing and submitting the contract to the UNTS Office of Contract Administration via the appropriate Total Contract Manager (TCM) tool: [ePro TCM](#).

Ensuring any potential conflict is disclosed via a [Conflict of Interest disclosure](#).



REMINDER: Texas Government Code mandates that state agencies as defined by Texas Government Code 2054.003(13) must only enter or renew contracts to receive cloud computing services that comply with [Texas Risk and Authorization Management Program \(TX-RAMP\)](#) requirements. If you have any contracts in process or upcoming software-as-a-service contracts, Work with your department IT manager to complete the [Technology Acquisition Questionnaire \(TAQ\)](#) and ensure IT compliance.



Your Partner for Savings – UNTS Office of Strategic Sourcing

The Strategic Sourcing team is here to assist UNT System departments and schools in making informed decisions related to their sourcing needs that achieve the best overall value for UNT System, while aligning with University goals. [Strategic Sourcing \(untsystem.edu\)](#)



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UNTS Office of HUB

The UNT System HUB Area is always available and ready to assist department representatives with locating a qualified and responsive HUB vendor or to assist a HUB-eligible vendor to acquire HUB certification. [Historically Underutilized Business \(untsystem.edu\)](#)

Contract Management

See resource: [Contract Management Best Practices](#).

Assisting with contract monitoring and contract closeouts.

Documenting vendor performance in writing including whether it is unsatisfactory, satisfactory, or exceptional and reporting non-compliance to the UNTS Office of Contract Administration and if a procurement contract, to the BSS.

Ensuring compliance with terms of the contract by UNT SYSTEM ENTERPRISE and the contracting organization.

Forwarding executed copies of contract to OCA when department has obtained the vendor signature.

If applicable, tracking the total cost or monetary value of each contract including all potential contract extensions or renewals whether automatic or by the execution of additional amendments.

If applicable, verifying accuracy of invoices and authorizing payments consistent with the contract terms.

Maintaining appropriate department records of contracts and agreements.

Monitoring contracts and initiating amendments, renewals and terminations in timely manner.

If applicable, updating contract elements as required by [HSC policy \(FMV\)](#).

- Contract Liaisons are **not** authorized to take the following actions:
 - ☒ Instructing the contracting organization to perform or UNT SYSTEM ENTERPRISE performing any duties under the contract before the contract is fully executed.
 - ☒ Changing the contract scope without doing so through the formal amendment process.
 - ☒ Directing the contractor to perform or UNT SYSTEM ENTERPRISE performing work that is not specified in the contract.
 - ☒ Extending the contract term without execution of an approved amendment.

☒ Allowing the either contracting party to incur additional costs over the limit specified in the contract.

Exceptions to Procedure:

- None

Training:

The UNTS Office of Contract Administration provides online and one-on-one training for Contract Liaisons. Requests for training should be emailed to the Office of Contract Administration at UNTContractadmin@untsystem.edu.

Additional Information:

- For assistance, contact the UNTS Office of Contract Administration UNTContractadmin@untsystem.edu.
- For questions about purchasing, contact the UNT System Business Service Center at 1-855-868-4357, 940-369-5500 or <https://www.untsystem.edu/purchasing>
- For assistance with research contracts, contact:
 - a. UNT | Send to appropriate Research office email (ResearchContracts@unt.edu) and cc: Michael Rondelli, Associate Vice President, Research Commercial Agreements, Office location: Virtual Office, michael.rondelli@unt.edu. <https://research.unt.edu/>
 - b. HSC | Send to appropriate OSP staff member and copy the dedicated email address: ospcontracts@unthsc.edu. <https://www.unthsc.edu/research/>
 - c. UNTD | Alicia Brossette, Exec Director, Research & Dev. Office of Sponsored Projects: Alicia.Brossette@untdallas.edu. <https://www.untdallas.edu/osp/index.php>
For questions related to legal issues, contact the UNT System Office of General Counsel at 1-940-565-2717 or <https://www.untsystem.edu/office-general-counsel>
- For additional information regarding UNT System contract requirements, see the https://www.untsystem.edu/sites/default/files/documents/contract_management_handbook_jan_2019_update.pdf.
- For additional information regarding the Board of Regents contract requirements, see [Regents Rule 03.900 Delegation of Authority for Contracts and Agreements](#).
- For additional information regarding UNT System Procurement requirements, see the <https://finance.untsystem.edu/procurement/index.php>



See our webpages and/or TEAMS Channel for frequently asked questions and responses.

[UNT Health webpage OCA FAQs](#)

[UNTS webpage OCA FAQs](#)

[FAQ | Purchasing Accounts Payable Contracts HUB | Microsoft Teams](#)