***Exhibit A – how to complete the New Contract Request in ePro TCM***

All fields with an asterisk (\*) have to be completed in order to submit the Contract Request.

**NEW CONTRACT REQUEST TEMPLATE = TCM Contract Request (FEB2025) effective 3/19/2025**

### Department Contact Information

|  |  |
| --- | --- |
| What Requestor Role do you have?\* | Select “Department” |
| Name of Requestor\* | Enter the name of the person submitting the Contract Request, especially if a different individual than the Department Contact/Contract Liaison. |
| Requesting Entity\* | Select your campus. |
| Department\* | Use the magnifying glass to search for your department.    Enter your department name here. Select saved changes. If you do not find your department, contact OCA via email. |
| Dept Contact Name\*  Dept Contact Email\*  Dept Contact Phone # | Enter the appropriate individual’s contact information. |

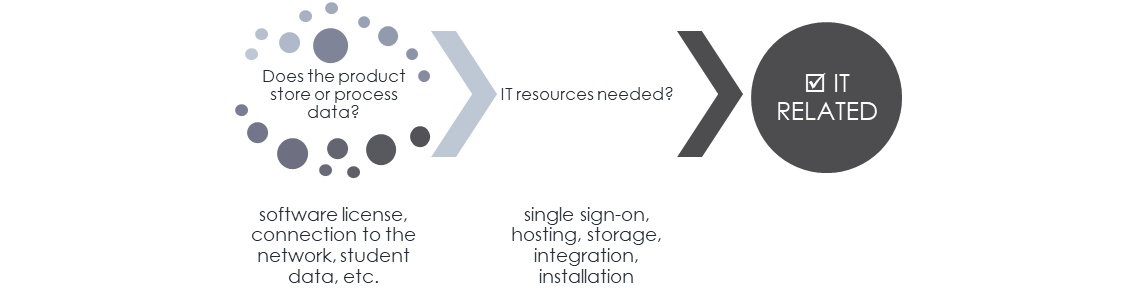
### Contract Information

|  |  |
| --- | --- |
| Summary\* | Describe the contract's general purpose and a short description of the services/scope of work. |
| Contract Value Type\* | Select the appropriate contract type [Revenue, Non-monetary, Expenditure] (if “Revenue or Expenditure” selected, answer the conditional field)   * Monetary Value Range\* [$2500 or less, $2501-$10k, $10,001-$50k, $50,001-$100k, $100,001-$250k] |
| Is this a Clickwrap purchase?\* | 🞎Yes/🞎No (if “Yes” selected, answer the conditional field)   * URL address |
| Type of Agreement\* | [New Agreement, Amendment/Addendum/Change Order, Renewal] (if “Amendment/Addendum/Change Order or Renewal” selected, answer the conditional field)   * Existing Contract Number\* |
| Total Contract Value\* | Enter the value of the contract for the full term. If the contract is “non-monetary” enter $0. |
| Contract Category\* | UNTS/UNT/UNTD Contract Liaisons select “Purchasing” |
| Does this need manual signature in addition to an eSignature? | 🞎Yes/🞎No If the vendor/2nd party will not accept DocuSign at all or will accept the University signature via DocuSign but will not countersign via DocuSign, please select “Yes”. |

### IT Questions

*Does the product store or process data?* [software license, connection to the network, student data, etc.] Or *are IT resources needed?* [single sign-on, hosting, storage, integration, installation]. **If the answer is “yes” to either question, the contract/purchase is IT related.** IT approval can be acquired by submitting a Technical Acquisition Questionnaire (TAQ) that is available within ServiceNow. The TAQ must now be completed, and an IT Compliance Release obtained prior to submission of the requisition & routing of the contract.

Determining if your contract is IT related



The link to the TAQ is available at the System IT, Acquisition of Technology Resources

page: <https://itss.untsystem.edu/divisions/mrs/it-compliance/technology-risk-assessment-program.php>.

|  |  |
| --- | --- |
| Is this IT Related?\* | 🞎Yes/🞎No (if “Yes” selected, answer the conditional field)   * Does the product already have IT approval?\* 🞎Yes/🞎No * Does the product already have TX-RAMP certification? 🞎Yes/🞎No |

### Expenditure Contract Information

This section appears when “Expenditure” is selected on *Contract Value Type*.

|  |  |
| --- | --- |
| Is this a PCARD purchase?\* | 🞎Yes/🞎No (if “Yes” selected, answer the conditional field)   * PCARD Purchase Categories\* [Catering, Goods, Events & Services, Hotel, Other] |
| Procurement Method\* | [Under $15,000, Formal Solicitation (RFX), Informal Solicitation, GPO (Cooperative), Exclusive Acquisition]  (if “Formal Solicitation (RFX)” selected, answer the conditional field)   * Enter the RFP Number   (if “Informal Solicitation” selected)   * [Sole Source, Proprietary, Exempt, Emergency] * *if submitted by dept*, upload the Informal Quote Summary (IQS)   (if “GPO (Cooperative)” selected, answer the conditional field)   * Select the GPO (Cooperative) from the dropdown list * Enter the GPO Contract Number |
| Buyer Name\* | [Ashley Barraza, Becky LaDuke, Jill Roys, Gabriel Morales, TBD] Select TBD if a Buyer has not yet been assigned to the requisition. |
| Requisition Number | Enter the valid, current ePro Requisition Number |
| Purchase Order Number | If applicable, enter the valid, current ePro Purchase Order Number |
| Previous Purchase Order Number | If applicable, enter the valid, ePro Purchase Order Number for the previous order/contract |
| Purchased on State Funds?\* | 🞎Yes/🞎No |
| Has the Purchase Order (PO) already been issued? | 🞎Yes/🞎No (if “Yes” selected, answer the conditional field)   * Is this PO submission due to: [rejected PO terms and conditions?, redline changes to PO terms and conditions or contract?, signature “required” by vendor?] |
| NIGP Commodity Code\* | Enter NIGP Commodity Code |

### Academic Contract Information

This section appears when “Academic” is selected on *Contract Category.*

If you see this section on the Contract Request, return to the Contract Category field and select “Purchasing”.

### Vendor/2nd Party Information

For this section, the terms "vendor" and "2nd party" mean the same thing.

|  |  |
| --- | --- |
| Vendor Name\* | Enter the vendor/2nd Party’s legal name |
| Vendor Contact Name\*  Vendor Email Address\*  Vendor Phone Number | Enter the appropriate individual’s contact information.  *If submitting a CLICKWRAP agreement, you may enter “n/a” for the contact information you are not able to acquire.* |
| Authorized Signatory Name and Title | This field is NOT required so if you don’t have this info, you may leave these fields blank. This information is helpful to lessen delays in acquiring the vendor/2nd party signature. |
| Authorized Signatory Email - 2nd party | This field is NOT required so if you don’t have this info, you may leave these fields blank. This information is helpful to lessen delays in acquiring the vendor/2nd party signature. |

### Additional Information/ Special Instructions

Agreements are processed on a first-in first-out basis. Timelines for contract processing and execution are estimated and can take more or less days depending on the complexity of the contract, applicable contract approvals (including responses/approvals from external parties), the volume of contracts currently in process, the availability of the University staff to process and the availability of all signatories (both internal and external) to execute contracts.

**Requests for Rush/Priority processing will be accommodated on a case-by-case basis.**

You may use the "[FAQ When Should I Start My Contract](https://myunt.sharepoint.com/:x:/r/sites/HSCFinanceWebsite/Shared%20Documents/Contract%20Admin/Other/faq_when_should_i_start_contract_jan2025.xlsx?d=w87bc7af16b8b40718b95bb706922b0bd&csf=1&web=1&e=33yA0c)" tool for general informational purposes to assist with planning. Use of this tool is optional and does not replace any deadlines communicated in policy, process or procedure related to contract timelines.

|  |  |
| --- | --- |
| Additional Information/Special Instructions | Enter instructions or information that’s helpful for contract review, routing, or signature. |
| Is this a rush?\* | 🞎Yes/🞎No (if “Yes” selected, answer the conditional fields)   * Date Needed By\* * Justification for priority processing\* |
| Is contract confidential in nature?\* | 🞎Yes/🞎No |

### Additional Requirements/Approvals

*Hints for this section:*

BOR (Board of Regent) approval is required for the following types of contracts: 1). Any contract that exceeds $5,000,000 in the current fiscal year or 2) Any contract that exceeds $2,000,000 per year for a multi-year contract. See [Regent Rule 3.9](https://www.untsystem.edu/board-regents/documents/rr/rr_03.900_contracts_agreements_041824.pdf) for additional requirements & exemptions.

A Fair Market Value (FMV) analysis may be required for contracts with a potential referral source (related to the provision of medical services by physicians and providers & lease of space). See [Policy 4.105 Contract Administration Compliance](https://unthsc.navexone.com/content/dotNet/documents/?docid=672&public=true).

|  |  |
| --- | --- |
| BOR Approval Required?\* | 🞎Yes/🞎No (if “Yes” selected, answer the conditional fields)   * Is BOR approval included in attachments?\* 🞎Yes/🞎No   *Per RR 03.900*[*Delegation of Authority for Contracts and Agreements*](https://www.untsystem.edu/board-regents/documents/rr/rr_03.900_contracts_agreements_041824.pdf)*, Board approval is required for Any contract that exceeds $5,000,000 in the current fiscal year or any contract that exceeds $2,000,000 per year for a multi-year contract (unless exempt under RR 3.905).* |
| Is this a foreign vendor?\* | 🞎Yes/🞎No  *A foreign government, including an agency of a foreign government; a legal entity created solely under the laws of a foreign state or states; an individual who is not a citizen or national of the United States; and an agent acting on behalf of a foreign source.* |
| Fair Market Value Analysis (FMV) Required?\* | 🞎Yes/🞎No (if “Yes” selected, answer the conditional fields)   * FMV Attached\* 🞎Yes/🞎No   *A Fair Market Value (FMV) analysis may be required for contracts with a potential referral source (related to the provision of medical services by physicians and providers & contracts for lease of space).* |
| Were any additional approvals obtained?\* | 🞎Yes/🞎No (if “Yes” selected, answer the conditional fields)   * (Mark all that apply) Which additional approvals obtained? [Legal Approval, Compliance approval, Facilities approval, Human Resources approval, Marketing approval, Telecommunications approval, Risk Management, PCARD exception, Other (not listed) * Approval(s) added to the attachments section?\* 🞎Yes/🞎No |
| Please mark each applicable selection below to identify all circumstances relevant to this contract/agreement. | [Use of University logo/seal, Financial Interest/Conflict of Interest disclosure, changes to insurance (limits, coverage), Intellectual Property/Export Control]  *This information will assist OCA in determining reviewers/approvers for the contract/agreement.* |