

UNTS BUSINESS CONTRACT CHECKLIST

The purpose of this Contract Checklist is to help you know where to start with reviewing/drafting a BUSINESS contract and then routing a BUSINESS contract for approvals and signatures through Procurement (if applicable) and/or the UNTS Office of Contract Administration (OCA). Generally, OCA reviews and processes

If you are in doubt about how to answer a checklist question for a particular contract or you have a concern about a contract that this checklist does not address, please contact the UNTS Office of Contract Administration or Office of General Counsel (OGC) for further assistance.

Shortcut links:

[Contract Management Handbook](#)

[Department responsibilities](#)

[Is contract IT related?](#)

[Selections in TCM](#)

[PAYMENT BY PURCHASE ORDER](#)

[PAYMENT BY PCARD](#)

[Contact Info \(OCA\)](#)

[Resources](#) | [TCM submitting contract request Exhibit A only handout](#)

For the purpose of this checklist, University encompasses the University of North Texas System and each of the component institutions.

start here
↓

Contract Management Handbook



For information regarding contracts, refer to the [Contract Management Handbook](#).



Also, see our Frequently Asked Questions:

UNTHSC	UNTS/UNT/UNTD
https://myunt.sharepoint.com/sites/HSCFinanceWeb/site/SitePages/FAQs.aspx	https://finance.untsystem.edu/contract-administration/faqs.php

Department responsibilities



- If applicable, following appropriate [Procurement](#) procedures
- Determining if a quote references Terms & Conditions and needs to be routed as a contract
- Preparing contract for routing once the contract has been drafted, reviewed and approved at the department level
 - Contact OCA for contract templates if needed
- When talking to the Contracting Organization/Vendor:
 - Ensuring the UNIVERSITY is listed as the Contracting Party, not the name of a department, employee or student
 - Explaining that additional terms and conditions may be required (Standard Addendum)
 - <https://www.untsystem.edu/offices/general-counsel/contracts/legal-review-contracts.php> (scroll to the Standard Addendum section)

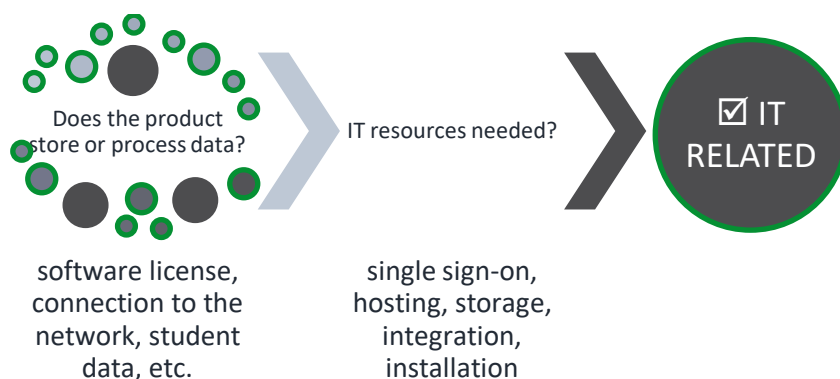
- Informing them that UNIVERSITY is using DocuSign to acquire secure electronic signatures
- Sharing the Vendor Guide to Doing Business with the University of North Texas System:
https://finance.untsystem.edu/sites/default/files/documents/vendor_guide.pdf
- Ensuring that blanks and specific department related information are completed on forms, contracts and contract related documents

- **REMINDER:** Employees must disclose a Financial Interest if they are (1) Employed by or (2) hold a Financial Interest in, a Business Entity that may bid for, is negotiating, or enters into a contract with the University. Employees must also disclose a Financial Interest if it is known that a family member (spouse, parents, siblings, children, or any individuals residing in the same household) are: (1) employed by or (2) hold a Financial Interest in, a Business Entity that may bid for, is negotiating, or enters into a contract with the Institution. We have updated that process for how to submit a disclosure, see <https://finance.untsystem.edu/procurement/conflict-interest-purchasing-and-contracting.php>.



Determine:

- **Is the contract IT related?** [Any University contract that includes an IT or technology-related component must be reviewed by IT prior to contract execution. IT reviews security protocols in the system or solution as well as identifies IT resources needed, such as single sign-on, hosting, storage, integration, installation, data security, review of cloud computing services, etc.]



IT related contracts for which the payment mechanism has been a PCARD must be transitioned to the requisition process effective 9/1/2024.

- 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 (SAAS) contracts [**this requirement comprises hardware purchases that include SAAS software**]. The IT State certification has to be acquired in order to approve a contract for execution.



ALL CAMPUSES - UNTS/UNT/UNTD/UNTHSC

Submit or follow your campus process to submit a [Technology Acquisition Questionnaire \(TAQ\)](#) for IT compliance & approval.

Technology Risk Assessment Program:
<https://technology.untsystem.edu/divisions/mrs/it-compliance/technology-risk-assessment-program.php>

The IT approval needs to be included with the requisition and/or contract submission.

- **Does the contract include a PURCHASE OF GOODS OR SERVICES?** [All purchases of goods and services (with specific exceptions) shall be made through the UNT System's division of Procurement and Payment Services/the Office of Contract Administration]
 - The Procurement Method (if applicable) is approved prior to the contract process.

	<p>Strategic Sourcing can identify opportunities to leverage UNT System's buying power by consolidating and driving spend to a smaller number of suppliers with whom we negotiate competitive contracts and promote to campus as preferred suppliers. <u>The Strategic Sourcing Team will assist you with a compliant Procurement Method.</u></p> <p>https://finance.untsystem.edu/procurement/strategic-sourcing.php</p> <p>Learn more about when to start the Procurement process with Strategic Sourcing here.</p>
	<div data-bbox="430 871 771 976">  </div> <p>Purchases in the Informal Bid Threshold must have evidence of 3 written informal bids/quotes, including at least 2 Historically Underutilized Business (HUB) vendors. The UNT System HUB Office 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).</p>

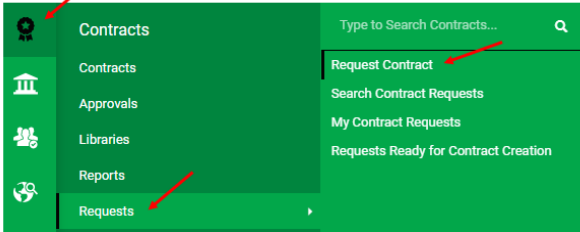
- **Is the vendor set up to receive payment in E-PRO (formerly UNTS Marketplace)?** UNT System has partnered with PaymentWorks, a third-party vendor onboarding and maintenance tool. With PaymentWorks, departments can now act as "Initiators" and send [PaymentWorks](#) registration invitations directly to their vendors before every submitting a payment request. Invitations can be sent at any time before a requisition is ever submitted

APPROPRIATE SELECTIONS IN TCM TO SUBMIT CONTRACT REQUESTS

TCM = Total Contract Manager, contract management tool

UNTS/UNT/UNTD

Note to Contract Liaison submitting Contract Request in E-PRO (formerly UNTS Marketplace): Navigate to Contracts > Contract Requests > Request a Contract.



As of March 19, 2025, **all campuses** will be using the ePro version of Total Contract Manager (TCM).

Info for Submitting a Contract Request in ePro TCM

- Department Contact Information
- If applicable, IT approval (release from Technical Acquisition Questionnaire (TAQ))
- If applicable, procurement method (requisition or PCARD)
- If applicable, any additional approvals
- Vendor/2nd Party information (contact, email and phone)
- Attachments
 - Contract/Statement of Work/Quote/IQS Form
 - Terms & Conditions
 - Emails, etc.




For a guide for how to complete the questions, see [Exhibit A – how to complete the Contract Request](#).

OCA strives to honor deadlines requested but keep in mind that 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.

See our FAQ - [How long will my contract review take?](#)

PAYMENT BY PURCHASE ORDER

The Service Form in E-PRO (formerly UNTS Marketplace) is a type of Purchase Order.

UNTHSC	UNTS/UNT/UNTD
View only access.	<ul style="list-style-type: none">• The current process is for the ePro Coordinator to attach the contract (and if applicable, IT approval & Informal Quote Summary (IQS form) with the requisition submission.• Once the procurement process is approved the Buyer submits the contract to the Office of Contract Administration (OCA) for all campuses in E-PRO TCM.  See Exceptions
<p>E-PRO (formerly UNTS Marketplace) webpage: https://finance.untsystem.edu/procurement/epro/index.php</p> <p>Training Guides: https://finance.untsystem.edu/procurement/epro/training/training-guides.php</p> <p>Bookmark this E-PRO (formerly UNTS Marketplace) link to sign in: https://solutions.scquest.com/apps/Router/SAMLAAuth/UNTS</p>	
<div>  Exceptions to the BUYER submitting the Contract Request in ePro TCM:</div> <ul style="list-style-type: none">• When the requisition auto approves to a PO• After PO dispatch, if the vendor rejects PO Terms & Conditions• After PO dispatch, if the vendor requires signatures <p>If these exceptions apply, the Contract Liaison submits the Contract Request in ePro TCM.</p>	

Check the status of the contract when the Requisition is in the “Sourcing & Contract” workflow step: [Job Aid - How do I find out the status of my contract?](#)

PAYMENT BY PCARD



effective
9/1/2024

PCARD contracts/agreements

- Approved for payment by PCARD - Copier/Printers, Food/Catering, Conference Registrations, Event Rental, Hotel contracts (Athletics & Events), vendors on approved list
- All other contract category types need to transition to the requisition process.
- See training material for exception request process.

CLICKWRAP contracts/agreements

- ***AMENDED ANSWER*** - IT Related CLICKWRAP agreements need to transition to requisition process
- Other Clickwrap agreements can remain on PCARD

Updates/changes will be communicated via this webpage: <https://finance.untsystem.edu/contract-administration/click-wrap-approval.php>

UNTS/UNT/UNTD

UNTS/UNT/ UNTD Contract Liaisons will use this form to submit **CLICKWRAP** agreements and business contracts/agreements that will be paid by **Pcard**.

Click wrap agreements are used in internet purchases where clicking "I Agree" is committing the UNTS or one of its component institutions to the vendor's terms and conditions. Departments/Contract Liaisons are responsible for reading and understanding the full terms and conditions associated with any purchase made with University dollars, as well as for complying with the policies regarding contracts and PCard usage.

For assistance, training about using this tool to submit contracts for PCARD & CLICKWRAP agreements is available on the UNTS Office of Contract Administration (OCA) website: <https://finance.untsystem.edu/contract-administration/click-wrap-approval.php>.

UNTHSC Campus Liaisons will use this form to submit contracts and agreements in the following categories: Clinical | Research related vendor contracts (including Cost Center) | Academic | Correctional | Operations (facilities/maintenance) | Advancement | Library

In [ePro TCM](#), the BUYERS will submit Contract Requests for expenditure contracts where the payment method is a requisition/Purchase Order for ALL campuses (**see the reference guide for exceptions*). Please ensure that the Requestor has uploaded all contract related information to the requisition.

For assistance, training about using ePro TCM to submit contracts, reference the [ePro TCM - Abbreviated Quick Reference Guide MAR2025](#) | [TCM submitting contract request Exhibit A only handout](#).

The UNTS Office of Contract Administration (OCA) supports the mission and values of the UNT System and its Component Institutions by facilitating business contract review, processing, routing and administration for UNT System Administration, UNT, UNT Health Science Center, and UNT-Dallas in a professional and timely manner, in accordance with State of Texas Laws and institutional policies. This includes, but is not limited to compliance review, analysis, and support for appropriate changes to contracts.

The Office of Contract Administration will also:

- Review and process business/service/purchasing/revenue contracts
- Assist with business contract negotiations (as needed)
- Facilitate routing of contracts to contract completion/execution
- Provide contract training
- Perform random and planned file/contract reviews of executed contracts/agreements for compliance and/or monitoring
- Maintain electronic records of business contracts through Database Management
- Post all contracts for the purchase of goods or services from a private vendor; unless they meet a criteria for exemption

Once received, OCA will review the purpose and impact of the contract to determine if additional approvals are required, including but not limited to:

<input type="checkbox"/> Board of Regents Approval (See RR 03.903 Board Approval)	<input type="checkbox"/> IT Approval (software, SAAS, data security, etc.)	<input type="checkbox"/> Legal Approval, Office of General Counsel (all contract require legal review unless exempt)	<input type="checkbox"/> Compliance approval (conflict of interest, fair market value analysis)
<input type="checkbox"/> Facilities approval (leases/utility resources)	<input type="checkbox"/> Human Resources approval (contractor/employee relationship?)	<input type="checkbox"/> Marketing approval (use of University logo, seal, etc.)	<input type="checkbox"/> Telecommunications approval (phone service services provided internally or by UNT System)

OCA will facilitate the determined approvals and provide status updates via the Total Contract Manager Contract Record and when possible, email.

Contact Info:

UNTS Office of Procurement, Office of Contract Administration

UNTScontractadmin@untsystem.edu

UNTHSC	UNTS/UNT/UNTD
HSC External webpage: https://www.unthsc.edu/division-of-finance/contract-administration/ HSC Internal webpage: https://myunt.sharepoint.com/sites/HSCFinanceWebSite/SitePages/Total-Contract-Manager-(TCM).aspx	UNTS webpage: https://finance.untsystem.edu/contract-administration/index.php



Resources:

UNTS Office of General Counsel

Contracts: <https://www.untsystem.edu/offices/general-counsel/contracts/index.php>

Regent Rule 3.9 https://www.untsystem.edu/board-regents/documents/rr/rr_03.900_contracts_agreements_041824.pdf

Procurement Policy and Requirements: <https://finance.untsystem.edu/procurement/policy-and-requirements.php>

HUB Webpage: [Historically Underutilized Business \(untsystem.edu\)](https://untsystem.edu)



Strategic Sourcing Webpage: [Strategic Sourcing \(untsystem.edu\)](https://untsystem.edu)

<p>Melissa Anderson Campus Liaison & Senior Strategic Sourcing Project Manager UNT System Procurement, Strategic Sourcing Technology Office: (940) 369-5563 Melissa.Anderson@untsystem.edu</p>	<p>Barry Sullenberger Campus Liaison & Senior Strategic Sourcing Project Manager UNT System Procurement, Strategic Sourcing UNTHSC Office: (940) 369-5574 Barry.Sullenberger@untsystem.edu</p>	<p>Kris Robinson Director of Strategic Partnerships UNT System Procurement, Strategic Sourcing UNT Dallas & UNTS kristopher.robinson@untsystem.edu</p>	<p>Katawna Lincoln Campus Liaison & Senior Strategic Sourcing Project Manager UNT System Procurement, Strategic Sourcing UNT Denton Office: (940) 369-8379 Katawna.Lincoln@untsystem.edu</p>
---	---	--	--