



OLA Contract Routing Form Job Aid for Contract Submission

Step by Step for Submitters (condensed):

- 1) Enter Contract Information via the [Contract Routing Form](#)
- 2) Receive Contract Submission Confirmation via email (shows what all was entered)
- 3) Receive Contract Approval Confirmation via email (all approvals have been acquired)
- 4) Start Payment Process (PO, check request, etc.)
- 5) Have Both Parties Sign the Contract
- 6) Upload Signed Contract via "Open Update Form" link in the Confirmation email
- 7) Department of the Contract is Responsible for the Originals

The **Contract Routing Submission Form** can be accessed via this [link](#). (We recommend adding a bookmark for easier access.) Please follow the below instructions to complete and submit this form. Questions notated with asterisk * are required.

1. UWG Contact Information

(Along with the submitter's name and email address, the UWG contact information for the contract is needed should the Office of Legal Affairs and/or any department approvers have questions or suggested revisions.)

- a. VP Approval*
 - i. Is the VP aware of the contract and its services/agreement?
- b. Contract Name*
 - i. Example:
 1. Software Purchase – Xitracs
 2. Grant Consultant – Historical Preservation Services
 3. Visiting Speaker – Health Education Program
- c. Submitter Name*
- d. Submitter Email*
 - i. This email address will receive a copy of the Confirmation Email
- e. UWG Contact Name*
- f. UWG Contact Email*
 - i. This email address will receive a copy of the Confirmation Email
- g. UWG Contact Phone
- h. UWG Contact Department*
- i. UWG Contact Division

2. Contract Information

(Please include details of the contract in this section. What type of contract it is; payment funding details; any grant funds to be used; total dollar amount or total value of the contract; etc.)

- a. Type of Contract*
 - i. This is a multi-selection question, so Please Select All That Apply
 - ii. Examples:
 - 1. Consultant Services
 - 2. Purchase of Goods
 - 3. MOU/MOA
 - 4. Registration
 - iii. If the type of contract you are submitting is not listed, please select Other and describe the contract in the next question
- b. Contract Type (Other)
 - i. If the Contract Type list in the previous question did not include the type of contract you are trying to submit, please list details here
- c. Contract Description/Purpose (Short Answer)*
 - i. Please describe in short, the main details of the contract
- d. Contract Term
 - i. Annual Contract (12 months)
 - ii. Short Engagement Month to Month etc.
 - iii. Please provide an anticipated start and end date if applicable
- e. Contract Is
 - i. New
 - ii. Renewal of an existing contract (please attach the original)
 - iii. Amendment to an existing contract (please attach the original)
- f. Payments To/From
 - i. From/To where will funding be allocated/received for this contract
- g. Are Grant Funds Involved?*
 - h. Yes/No
- i. Funding Source Account Name
 - i. Example:
 - 1. Department Name
 - 2. Student organization Name
 - 3. Foundation Account Name
 - 4. Grant Name
 - 5. E&G, Auxiliary, Student Fees, etc.
- i. Funding Source Account Number
 - i. If a UWG account is to be used please provide:
 - 1. Fund-Dept. ID-Program-Class
- j. Contract Dollar Amount Total*
 - i. Total dollar value of the contract
- k. Description of Services/Goods to be Purchased
 - i. If any goods or services are to be purchased, please provide a short description/details of the purchase.
 - ii. If contract is not related to the purchase of goods/services, please type N/A

3. Company's Information

(Please provide the details of the Company/Organization/Supplier/Other Party.)

- a. Company Name
- b. Company Address
- c. Company Point of Contact Name
- d. Company Point of Contact Phone
- e. Company Point of Contact Email
- f. Company Technical Point of Contact (if applicable)
 - i. Name
 - ii. Phone
 - iii. Email

4. Contract Data Sharing Information

(If the contract includes any type of data sharing information related to proprietary information, export controlled information, or if any foreign nationals are involved, if applicable, please provide that information in this section. If the contract does not include any data sharing information, please leave this section blank)

- a. Will you be disclosing and/or receiving proprietary information?*
- i. Proprietary Information means confidential or proprietary information, knowledge or data concerning the UWG's/Company's businesses, strategies, operations, financial affairs, organizational matters, personnel matters, budgets, business plans, marketing plans, studies, policies, procedures, products, ideas, processes, software systems, trade secrets and technical know-how, and other information regarding the business of UWG/Company. This includes information related to FERPA and HIPAA.
- b. Non-Confidential Description of the subject matter or project name.
 - i. Please provide a short description of the project leaving out any confidential or proprietary information.
- c. Are you going to disclose and/or receive export-controlled information?
 - i. Export-controlled information or material is any information or material that cannot be released to foreign nationals or representatives of a foreign entity, without first obtaining approval.
- d. Will any HIPAA information be shared as part of the contract?
 - i. The Health Insurance Portability and Accountability Act of 1996 (HIPAA) is a federal law that requires the creation of national standards to protect sensitive patient health information from being disclosed without the patient's consent or knowledge.
 1. Will any medical information be shared in this contract?
- e. Will any FERPA information be shared as part of the contract?
 - i. The Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99) is a Federal law that protects the privacy of student education records.
 1. Will any student education records/information be shared in this contract?

- f. Are there any foreign nationals working on this project?
- g. Estimated date when you expect the exchange of proprietary information will begin:
- h. Estimated timeframe when you expect the exchange of proprietary information will cease:
- i. Estimated length of time the proprietary information should be protected:

5. Additional Considerations

- a. Is this for an event on campus where an external 3rd party will be providing food on campus? (Student event, Camps/Conference, Food Truck event, etc.)
- b. Does the contract involve the use of UWG Logos or proprietary marks?
 - i. All UWG logos and trademarks are owned by the University and any use of these logos or trademarks will need to be approved by UCM.
 - ii. Example:
 - 1. Use of logos in advertising
 - 2. Use of logos for promotional items
- c. Is the Company on the approved Trademark Approval list?
 - i. If you answered yes to the previous questions, and you know that the Company has paid the Trademark fee which allows the Company to use UWG logos and trademarks, please indicate yes or no. If this question is not applicable, please choose N/A.
- d. Will Credit Card payments be processed utilizing this software or service?
 - i. If you answer Yes to this you are indicating that the software/system you intend to contract with will be used to accept payments for or on behalf of UWG. Answering Yes to this question will require additional review and documentation to be provided to the UWG PCI (Payment Card Industry) Committee.
 - ii. This refers to the Payment Card Industry (PCI) requirements that UWG has to be compliant with when accepting payments.
 - iii. Examples:
 - 1. Contract is for a Software that involves accepting online registration payments.
 - 2. Contract is for an Orientation platform that involves accepting online payments.
- e. Does the contract include the purchase of new furniture involving cubicles?
- f. Will any services be provided on the UWG Campus as part of this contract?
- g. Will any services involve student interaction as part of this contract?
- h. Does the contract involve study abroad (international) or study away (domestic)?
- i. Will the total cost of the purchase (non-construction related) be more than \$24,999.99?
 - i. Per State Statutes and Department of Administrative Services (DOAS) any purchase of goods/services above \$24,999.99, that is not considered an exempt purchase, is subject to the competitive bidding requirements.
 - ii. If a yes is answered to this question, Purchasing may have to assist and

- conduct and competitive solicitation.
- j. Has funding been encumbered on a Purchase Order?
 - i. If this is a purchase of goods/services and a requisition has not yet been entered in ePro, please do so, this is so the procurement process can occur simultaneously as the contract routing process.
 - k. Will items be offered for resale as a result of this contract?
 - i. Does this contract involve the sale of any goods or services?
 - 1. Example:
 - a. Food
 - b. Retail Items
 - l. If Company is providing services on campus, have they provided a Certificate of Insurance?
 - i. If yes, please attach them with your contract.
 - m. If Company is providing services of \$2,500.00 or more have they provided an executed, notarized eVerify Affidavit?
 - i. If yes, please attach together with your contract.
 - ii. eVerify is a Federal Law and Mandated by the State of Georgia.
 - iii. eVerify is a web-based system that allows enrolled employers to confirm the eligibility of their employees to work in the United States.
 - iv. If you hold a public contract, which is a contract with a city, county, the state, a school board, etc. a notarized eVerify affidavit is required to be provided.
 - v. If the Company is an individual with no other employees, a copy of their Driver's License can be accepted in lieu of a notarized affidavit.

6. Submitter Acknowledgement

- a. Contract Attachment
 - i. Please attach an electronic copy of the contract together with any applicable supporting documentation.
 - ii. More than one file can be attached to the submission.
 - 1. Example:
 - a. Certificate of Insurance
 - b. Notarized eVerify
 - c. Original contract (if renewal or amendment)
 - d. Third-Party Agreement

7. After Contract Submission

- a. Once the contract is submitted, depending on the details of the submission, it will route to applicable areas for approval such as Purchasing, ITS, UCM etc.
- b. If the contract needs any revisions the department is responsible for 1) making the changes to the contract, 2) sending the revised contract to the outside party for their review, and 3) uploading the revised contract to the system.
- c. When all required departments have reviewed and approved, the contract is then reviewed by OLA.

- d. Once OLA has reviewed and approved a contract, a Confirmation Email is sent to the submitter and the UWG contact.
 - i. The Confirmation Email lets the submitter & contact know the contract has been approved.
 - ii. When the submitter receives the Confirmation Email they
 1. Complete payment process
 2. Acquire signatures for the contract per the Delegation of Authority Matrix.
8. When the contract has been signed by both parties the submitter will upload an executed copy via the Open Update Form link provided in the Confirmation Email.
9. If you have any questions, feedback, or suggestions, please email the Office of Legal Affairs at contracts@westga.edu.