

**UNIVERSITY OF SOUTH ALABAMA
AGREEMENT CHECKLIST**

Instructions: Section I, Section III (if appropriate) and Section IV must be completed for every agreement between USA and another institution, organization or business. If this Agreement is grant-funded, Sections I, II, III and IV must be completed entirely and sent to the appropriate College / Department Grant Administrator.

I. AGREEMENT INFORMATION

1. OSP Log # or Attorney's Office Log # _____ / _____
2. Agency / Vendor _____
3. Title _____
4. Monetary Amount of Agreement (if applicable) \$ _____
5. If this is a USA template, I verify there were no changes made. Sign here→ _____
6. Has this Agreement been bid/RFP through USA Purchasing? *If yes, is Immigration Law affidavit and E-Verify Company Profile Document attached? To view this document go to:* YES NO
<http://www.southalabama.edu/financialaffairs/purchasingdepartment/immigrationcompliance.pdf>
Items available from only one vendor/manufacturer may be approved as sole source after a review by the Purchasing Agent. To facilitate this review, a detailed statement, written and signed by the user and attested to by the Department Head, must accompany the requisition.
7. Source FOAPAL # _____
8. Deadline for Final Execution _____
9. Is this Agreement funded by an external grant? YES NO
If yes, route to Department / College Grants Administrator
10. Is this a request for a modification to an existing Agreement? YES NO
If yes complete this form: <http://www.southalabama.edu/oga/pdf/agreementmod.pdf>
11. Principal Investigator / Responsible Person _____
 Telephone # _____ Dept. _____ Bldg/Room # _____

II. SUBRECIPIENT INFORMATION (grant-related only)

Subrecipient Name _____
 Subrecipient Contact _____ Email _____
 Subaward Title _____
 Subaward Start Date _____ End Date _____

III. COMPLIANCE INFORMATION

- Will human subjects be used in the course of the research at USA or at collaborating institution?
 YES NO Note: If "YES", copy of approval required. **For assistance, please call 460-6308**
- Will animals be used in the course of the research at USA or at collaborating institution?
 YES NO Note: If "YES", attach approval letter. If at a foreign site, follow USA IACUC guidance at
<http://www.southalabama.edu/researchcompliance/pdf/domesticandforeignsubcontracts.pdf> **For assistance, please call 460-6863**
- EXPORT CONTROLS**
 YES NO Will any equipment be shipped by the University in the course of this project?
 YES NO Will this project require any export controlled items or information to be received on campus?
 YES NO Will this project involve any foreign nationals?
For assistance, please contact Alison Henry at 460-6509
- CONFLICT OF INTEREST**
 YES NO Have all participants involved in this project complied with the policies of their institution regarding disclosures of conflict of interest(s)?
- HIPAA**
 YES NO Will this Agreement involve the use, disclosure, or access by the vendor to identifiable health information of any patient?

IV. AUTHORIZATION

I have read this Agreement, including all attachments and exhibits and have reviewed this Agreement with the Administrator, Dean, Vice President, Director or Chair, and that individual is aware of all business terms of this Agreement. The business terms negotiated and agreed to by the parties are contained in this Agreement.

Principal Investigator or

Responsible Person _____ **Signature** _____ **Date** _____

I am aware of all business terms of this Agreement and approve.

Dean / Department Head / Administrator

Printed Name _____ **Signature** _____ **Date** _____

Date released by legal office for: (a) requested changes to Agreement _____
 (b) execution by agency/vendor/USA _____

Date signed by agency/vendor _____ Date signed by University _____

Return copy of this checklist to legal office upon completion of agreement process. Retain original checklist and agreement in above-identified department. The State Records Commission, under authority granted by Section 41-13-21 of the Code of Alabama, 1975, mandates that all agreements, leases and contracts be retained for seven years after the terms of the document are fulfilled and then destroyed. All real property leases and capital improvement agreements are to be retained permanently.