

UNIVERSITY OF SOUTH ALABAMA

AGREEMENT CHECKLIST

Date: _____

Instructions: If you are unable to submit your agreement/contract through the Agreement and Approval Tracking System, you may submit it by filling out the information below, and emailing your agreement/contract, along with this checklist to alowry@southalabama.edu (Please cc your department head so that he/she can respond with "Approve").

I. VENDOR/AGREEMENT INFORMATION

1. Agency/Vendor/Contractor: _____
2. Agreement Title/Type: _____
3. Description: (Please provide as much information as possible) _____

4. Agreement Term: _____ Monetary Amount of Agreement: _____
5. Deadline: _____ Other Information/Comments: _____

II. DEPARTMENTAL INFORMATION

1. Name of Person Submitting: _____ Phone Number: _____
2. Email Address: _____ Location: _____
3. Department: _____
4. Department Head Name: _____ Email: _____
5. FOAPAL: _____ - _____ - _____

III. GENERAL AGREEMENT INFORMATION

1. Is this a USA Template? YES _____ NO _____
If yes, verify there were no changes made by entering initials here _____
Yes, but changes were made – Attach a copy of document including these changes.
2. Is this an addendum, renewal, or amendment to an existing agreement? YES _____ NO _____
3. Was this contract **required to be bid**? YES _____ NO _____ **BID Number:** _____
Yes, supply E-Verify Company Profile Documents. If unsure, call Purchasing at 471-7138 (7-7138).
4. Is this Agreement a **Public Works Project** over \$50,000? YES _____ NO _____ If yes, contact Purchasing at 471-7138 (7-7138). Public Works is defined as the construction, installation, repair, renovation, or maintenance of public buildings, structures, sewers, waterworks, roads, curbs, gutters, side walls, bridges, docks, underpasses, and viaducts, as well as any other improvement to be constructed, installed, repaired, renovated, or maintained on public property . . .)
5. Is this Agreement funded by an external **Grant**? YES _____ NO _____
Yes, route to Department/College Grants Administrator. Attach Grant information (PI, Subrecipient Info).
6. To the best of your knowledge, are there any USA employees who have a relationship, financial or otherwise, with the party involved in this transaction or with an employee, representative, or agent of a party in this transaction?
YES _____ NO _____
7. Does this agreement involve the purchase of any software or informational technology? YES _____ NO _____
8. Does this agreement involve immigration concerning faculty, staff or students? YES _____ NO _____

IV. COMPLIANCE INFORMATION

1. Will any equipment be shipped by the University in the course of this project? YES _____ NO _____
2. Will this project require any export controlled items or information to be received on campus? YES _____ NO _____
3. Will this project involve any foreign nationals? YES _____ NO _____
4. Are there restrictions in the terms of the award which require prior approval? YES _____ NO _____
For assistance please call Dusty Layton at 460-6625
5. Has the vendor completed a State of Alabama Disclosure Statement (for agreements over \$5000)? YES _____ NO _____
6. Will this Agreement involve the use, disclosure, or access by the vendor or sub recipient to identifiable health information (PHI) of any patient? YES _____ NO _____
If yes, please attach signed BAA Agreement.

- V. APPROVALS: The Department Head/Administrator/Dean/Vice President/Director or Chair has read this contract, including all attachments and exhibits and is aware of all business terms of this contract. The business terms negotiated and agreed to by the parties are contained in this contract:** YES _____ NO _____