**CONTRACT PROCESS OVERVIEW - JULY 27, 2023**

1. **What is your need? Issue, problem?**
   - **DEFINE YOUR NEED**

2. **Identify vendor(s)**
   - **WHO CAN FILL THE NEED?**

3. **Get pricing - best value to UHCL**
   - **GET QUOTE**
     - **NEED ONLY 1 - TRY FOR HUB**
     - **YES**
       - **ANY SERVICE/SOFTWARE**
         - **REQUIRES CONTRACT**
     - **NO**
       - **ANY GOODS**
         - **DO NOT USE CONTRACT**

4. **Is this for a service or software?**
   - **YES**
     - **COMPLETE ISHSC**
       - Will be reviewed by UHS ISO Office
   - **NO**
     - **PREP REQUISITION**

5. **Does contract call for hosting of UHCL info on non-UHS servers?**
   - **YES**
     - **COMPLETE ISHSC**
     - Will be reviewed by UHS ISO Office
   - **NO**
     - **PREP REQUISITION**

6. **How much is it?**
   - **DETERMINE COST**
     - **BUDGETED?**
       - **YES - >$15k**
         - **ADD PROCUREMENT METHOD**
     - **LESS THAN $15k**
       - **NO PROCUREMENT METHOD NEEDED**
         - **GO TO STEP 8**

7. **$15k or more?**
   - **COI**
     - **VENDOR PROVIDES**

8. **Get a Certificate of Insurance**
   - **COMPLETE SPA**

9. **Start with Standard Contract**
    - **[STANDARD PURCHASING AGREEMENT]**

10. **Vendor wants their own T&C**
    - **ANY CHANGES TO SPA?**
        - **LEGAL**
        - **NO PRE-SIGNING!**

11. **Any variance to our SPA needs legal review**
    - **LEGAL**

12. **Do NOT sign a contract before legal okays it**
    - **VENDOR AGREES**

13. **Vendor agrees/signs**
    - **DEPT AGREES**

14. **UHCL agrees/signs**
    - **CREATE REQUISITION**

---

**PLEASE NOTE:** Performance & Speaker Agreements require an insurance waiver (UHCL not responsible for vehicles on campus). Professional Services Agreements are used for medical professionals. OCA coversheet required for legal reviews. Standard Contract Addendum is required to comply with TX Gov Code when our contract's terms and conditions are changed by the vendor, or they require that we use their contract template instead. Contracts valued at $0-$15k, no bid required. Contracts between $15k - $25k need 3 informal bids (not posted on ESBD). Contracts >$25k need 3 formal bids [post on ESBD]. Procurement method choices are: sole source, cooperative contract, bid solicitation and emergency purchase. Electronic State Business Daily = ESBD. CONTRACT ENCUMBRANCES - must be planned for during annual budget cycle.