THE UNIVERSITY of TEXAS SYSTEM
CCARS
CONTRACT COLLABORATION & REPORTING SYSTEM

Department Contract Administrator (DCA) Checklist

Please visit the Forms and Guides page on the Contract and Procurement website for links to information referenced below. For questions, send an email to CNP@utsystem.edu.

SECTION 1: INFORMATION GATHERING

DEPARTMENT INFORMATION	
Department:	
Department Contract Administrator (DCA) Name:	
DCA Phone Number:	
DCA Email Address:	

CONTRACT INFORMATION	
Preferred Effective Date:	
Proposed Dates of Service:	
Initial Term (# of years, months, or days):	
Renewal Term Options (how many):	
Initial Contract Cost:	
Cost for Each Option Period:	
TOTAL Cost of Contract: *(Initial + all Options)*:	
Funding Type: *(UTS Cost Center, Project, Institutional Funds or No Funding)*	
Cost Center or Project Number *(8 digits)*:	
If Contract Modification, Previous BA#:	

VENDOR INFORMATION	
Vendor Name:	
PeopleSoft Vendor ID:	
Vendor Address:	
Vendor Contact Name:	
Vendor Phone Number:	
Vendor Email Address:	

Section 2: Data and Document Gathering

Required documentation should be gathered in advance of beginning the Request process in CCARS. The Request form can be **saved** until all documents are provided and the form can be moved to a submitted status.

Click on the appropriate Checklist link:

- **CHECKLIST A** – Contract (Purchase is **NOT** for Technology and /or Vendor **will not** have access to UT data)
- **CHECKLIST B** – Contract (Purchase of Technology and/or where Vendor **will** have access to UT data)
- **CHECKLIST C** – Contract (Memorandum of Understanding (MOU))
- **CHECKLIST D** – Purchase Order (Purchase Order is **NOT** for Technology and /or Vendor **will not** have access to UT data)
- **CHECKLIST E** – Purchase Order (Purchase Order for Technology and/or where Vendor **will** have access to UT data)
- **CHECKLIST F** – Supporting Documents (May be required based on specifics of the procurement method and/or contract requirements)

	CHECKLIST A - Contract (Purchase is **NOT** for Technology and /or Vendor **will not** have access to UT data)	
1	If the vendor is not set up in PeopleSoft, send an invitation to the vendor via PaymentWorks	☐
2	Exclusive Acquisition Justification (EAJ) required if purchase is over $15,000 and not justified through bidding process (formal, informal, GPO)	☐
3	Obtain department head approval to initiate the procurement process (**required** – may be an email or initialed agreement)	☐
4	If over $100k, items needed:	☐
	Hub Subcontracting Plan	☐
5	If over $250k, items needed:	☐
	Completed Risk Assessment	☐
	Completed Contract Monitoring Plan	☐
6	If over $1M, items needed:	☐
	OGC Approval of Terms and Conditions	☐
	Form 1295	☐
	Signed Nepotism Form	☐
7	If over $10M or an EAJ over $1M, Provide an attestation letter	☐
8	Review Supporting Documents to verify additional needed documentation (Checklist F)	☐
9	Submit a Request in CCARS (REQ#__________________)	☐

Required documentation must be provided when submitting a Request in CCARS. The form may be saved until all documents are provided, then the form can advance to a submitted status.

	CHECKLIST B - Contract (Purchase of Technology and/or where Vendor will have access to UT data)	
1	Request Voluntary Product Accessibility Template (VPAT 2.4 Rev 508**)** from the vendor	☐
2	Submit Accessibility Intake Form with VPAT to ITPurchasing@utsystem.edu and obtain results and/or exception	☐
3	Submit ISOTRAQ information and obtain report	☐
4	If the purchase includes Artificial Intelligence (AI) submit to the Privacy Team for review/approval: Privacyofficer@utsystem.edu	☐
5	If the vendor is not set up in PeopleSoft, send an invitation to the vendor via PaymentWorks	☐
6	Exclusive Acquisition Justification (EAJ) required if purchase is over $15,000 and not justified through bidding process (formal, informal, GPO)	☐
7	Obtain department head approval to initiate the procurement process (**required** – may be an email or initialed agreement)	☐
8	If over $100k, items needed:	☐
	Hub Subcontracting Plan	☐
9	If over $250k, items needed:	☐
	Completed Risk Assessment	☐
	Completed Contract Monitoring Plan	☐
10	If over $1M, items needed:	☐
	OGC Approval of Terms and Conditions	☐
	Form 1295	☐
	Signed Nepotism Form	☐
11	If over $10M or an EAJ over $1M, Provide an attestation letter	☐
12	Review Supporting Documents to verify additional needed documentation (Checklist F)	☐
13	Submit a Request in CCARS (REQ#_____)	☐

- Required documentation must be provided when submitting a Request in CCARS. The form may saved until all documents are provided, then the form can advance to a submitted status.
- For VPATs, there is a general exception signed by the EVC for Business Affairs that VPATs are not needed if the purchase is for UT System use only or if the total value is under $25k

	CHECKLIST C - Contract (Memorandum of Understanding (MOU))	
1	If the vendor is not set up in PeopleSoft, send an invitation to the vendor via PaymentWorks	☐
2	Request the template from OGC	☐
3	Obtain Office of General Counsel (OGC) approval "as to form" in writing if not drafted by OGC	☐
4	Obtain department head approval to initiate the MOU process (**required** – may be an email or initialed agreement)	☐
5	Obtain vendor signature	☐
6	Submit a Request in CCARS (REQ#__________________)	☐

Required documentation must be provided when submitting a Request in CCARS. The form may be saved until all documents are provided, then the form can advance to a submitted status.

	CHECKLIST D - Purchase Order (PO) (Purchase Order is **NOT** for Technology and /or Vendor **will not** have access to UT data)	
1	If the vendor is not set up in PeopleSoft, send an invitation to the vendor via PaymentWorks	☐
2	Obtain quote within 30 days of purchase	☐
3	Obtain department head approval to initiate the procurement process	☐
4	Exclusive Acquisition Justification (EAJ) required if purchase is over $15,000 and not justified through bidding process (formal, informal, GPO)	☐
5	Review Supporting Documents to verify additional needed documentation (Checklist F)	☐
6	Create PO Requisition in PeopleSoft (PO will be auto generated if <$15k)	☐
7	Email supporting documentation to CNP@utsystem.edu (review Checklist F)	☐
8	Email completed and approved PO to vendor	☐
9	PO accepted by vendor	☐

Additional Information:

- POs can be used for companies (incorporated, LLCs, etc.) but not for individuals. To contract with individuals, use the Authorization of Professional Services form or a vendor contract.
- POs cannot be used for food and beverage purchases.
- Required documentation must be provided when submitting a Request in CCARS. The form may saved until all documents are provided, then the form can advance to a submitted status.

	CHECKLIST E – Purchase Order (PO) (Purchase Order for Technology and/or where Vendor will have access to UT data)	
1	Request Voluntary Product Accessibility Template (VPAT 2.4 Rev 508) from the vendor	☐
2	Submit Accessibility Intake Form with VPAT to ITPurchasing@utsystem.edu and obtain results and/or exception	☐
3	Submit ISOTRAQ information and obtain approval – If the purchase is for software licensing, review the current enduser/software license agreement. A contract should be in place prior to the PO being issued. If there is not one, please contact CnP: cnp@utsystem.edu	☐
4	If the purchase includes Artificial Intelligence (AI), submit to the Privacy for approval: Privacyofficer@utsystem.edu	☐
5	If the vendor is not set up in PeopleSoft, send an invitation to the vendor via PaymentWorks	☐
6	Exclusive Acquisition Justification (EAJ) required if purchase is over $15,000 and not justified through bidding process (formal, informal, GPO)	☐
7	Obtain department head approval to initiate the procurement process	☐
8	Obtain quote within 30 days of purchase	☐
9	Review Supporting Documents to verify additional needed documentation (Checklist F)	☐
10	Email supporting documentation to CNP@utsystem.edu (review Checklist F)	☐
11	Create PO Requisition in PeopleSoft (PO will be auto generated if <$15k)	☐
12	Email completed and approved PO to vendor	☐
13	PO Accepted by vendor	☐

Additional Information:

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- Required documentation must be provided when submitting a Request in CCARS. The form may saved until all documents are provided, then the form can advance to a submitted status.

	CHECKLIST F – Supporting Documents **(May be required based on specifics of the procurement method and contract requirements)**	
1	Certificate of Insurance	☐
2	Partially executed agreements (I.e., MOUs,)	☐
3	Proposals, quotes, Software Licensing Agreements, etc.	☐
4	Additional Approvals (Privacy, Insurance, etc.)	☐
5	Non-disclosure agreement	☐
6	Scope of Work	☐
7	Concurrence Form	☐