

# Contract Review Process Instructions

## **Contract Routing Sheet**

A contract routing sheet is used to facilitate the contract and agreement review and approval process. A routing sheet is used to verify that the cognizant vice president or the provost is aware of the project and approves review of the contract. Proper use of the routing sheet also ensures that everyone necessary has reviewed the contract and that recommendations for change have been followed before the contract is signed. The Contract Routing Sheet must always accompany contract documents before the contract review process is initiated.

## **What Documents Must Be Reviewed?**

Agreements, contracts, MOUs or other legal documents that create obligations or liability on the part of the College, regardless of the amount of the financial commitment, must be reviewed before they are signed. Official College forms should also be reviewed when appropriate. The following documents must be reviewed:

- Contracts that are new
- Contracts being renewed that have not previously been reviewed
- Contracts being renewed with changes to the terms and conditions
- New or revised College standard templates or forms

## **Standard Contract Templates**

Whenever possible, use one of the standard contract templates already reviewed by Risk and Legal to create the contract. This will speed up the review process. The latest templates are available on the Risk Management website under "Forms." Copy the template to your computer and fill it in. For questions or assistance, please contact Mikel Birch by phone (801-957-4041) or email. Forms include:

- Goods and Services standard template (to be used for purchase of goods and for services (excluding entertainment contracts))
- Independent Contractor standard template (replaces the Independent Contractor Form previously used by the Business Office)
- Entertainment/Workshop standard template (to be used for entertainers, performers, and workshop presenters)
- Affiliation Agreement standard template (to be used for Health Science and School of Applied Technology medical programs with clinical or internship sites)

For additional information or training on the use of the standard templates, please contact Lynn Miller by phone (801-957-4533) or email (lynn.miller@slcc.edu).

### **How Does the Process Work?**

1. Select an SLCC standard template whenever possible. Access the current version of the template on the Risk Management website under “Forms.” The templates are Word documents that can be filled out and forwarded, along with a Contract Routing Sheet.
2. Access the current version of the Contract Routing Sheet from the SLCC web page by locating “contract routing sheet” under the “Forms” tab.
3. The Contract Routing Sheet is a PDF document that can be filled out electronically. Save a copy to your computer. Fill out the first section of the form and forward it, along with an electronic copy of the contract documents (contract plus any attachments, exhibits, etc.) to the VP or Provost for their authorization for procurement/legal/risk to begin the review process. Use the name of the contract identified on the Contract Routing Sheet as the subject line for the email message.
4. The VP or Provost demonstrates his/her authorization to review the contract by forwarding the email containing electronic copies of the Contract Routing Sheet and the contract document(s) to [lynn.miller@slcc.edu](mailto:lynn.miller@slcc.edu). The review process will not be initiated until all documents have been received.
5. Contracts are normally reviewed on a first-in-first-out basis. The person listed as the contact person will receive an email message as soon as the contract has been reviewed. The Contract Routing Sheet will be scanned and returned to the contact person via email within one business day of the completion of the review.
6. The contact person is responsible to follow through with the contract documents by:
  - a. Making the changes recommended by legal/risk, including working with legal/risk if the contractor wishes to make additional changes;
  - b. Verifying that recommendations have been followed by signing and dating the Contract Routing Sheet;
  - c. Obtaining final approval of the VP/Provost for the reviewed contract (evidenced by the VP/Provost signature on the Contract Routing Sheet); and
  - d. Obtaining authorized signatures to execute the contract.
7. Once the contract has been executed, send a .pdf version of the completed Contract Routing Sheet and of the executed document to [lynn.miller@slcc.edu](mailto:lynn.miller@slcc.edu) for inclusion in the College master contract file.