

Frequently asked questions:

1) How do I know if I need to send a quote or contract to contracts@wtamu.edu

- a) If you have received a contract or quote document from your vendor/affiliate that has specific terms and conditions that requires a signature on that document – you will want to send it to us for review and signature. Some vendors have terms and conditions on a quote with a signature line, but do not really require a signature, this will also need to be sent to the Contract Administrator for review.
- b) The Purchasing Department will also forward any contract or agreement to the Contract Administrator for processing if they are attached to a requisition.

2) So - what happens after I send in a contract/agreement for review and signature?

- a) The Contract Administrator will create a new file in AgiLoft and begin the approval processes which is dependent upon the type of contract/agreement and will always follow the President's Delegation of Authority.
- b) Most all of the departments that send requests for review or drafting of a contract, prefer to remain the point of contact with the vendor or affiliate.
- c) The Contract Administrator will review the agreement. If there are edits that need to be made, we generally utilize tracked changes for easier viewing, or will draft an amendment. If you are able to obtain the vendor/affiliate's agreement in editable WORD format - that is always appreciated.
- d) Keep in mind that all contracts (actual or implied) \$100,000.00 and over are required to be reviewed by TAMUS Office of General Counsel. Contracts with a lesser dollar amount, or State of Texas terms and conditions/language that we are required to have in a contract that the vendor wants to remove or negotiate that may be complex, will also be submitted by Contracts to OGC for their review and opinion.
- e) The Contract Administrator will be in direct communication with the vendor if there are terms to negotiate.
- f) There are several approval steps required, as noted in the President's Delegation of Authority, for each contract/agreement, including but not limited to, Department Head, Dean, IT, Risk, etc. These approvals are required and recorded **PRIOR** to final negotiation of terms with the vendor.
- g) Along with these required approvals, if applicable, a risk assessment will be completed for the contract/services. If this risk assessment results in a moderate or high score based on the cost or the complexity of the services, an Enhanced Contract Monitoring Form will be completed and recorded. It will be the departments responsibility to track services and deliverables as related to the contract, to identify any ongoing issues or risks.
- h) Once all of the approvals have been recorded and the Contract Administrator has successfully negotiated all terms and conditions with the vendor, the signature process will begin. This signature process strictly follows the appropriate authorized signatory as noted in the President' Delegation of Authority. Once the contract/agreement is executed the Contract Administrator will update the AgiLoft file with beginning, ending, renewals and record retention dates for all email notifications. As a courtesy, if there is a requisition number tied to the contract, we do our very best to forward a fully executed copy directly to the Purchasing Department. Please be sure that your Department also forwards that fully executed contract or follows up with purchasing@wtamu.edu on issuance of purchase order.

5. What information does our Contract database contain?

- a) Our database is called AgiLoft. We will set up the vendor/affiliate name, contact, beginning date, date of expiration, \$ amount, etc. We will also scan in the fully executed agreement, certificates of insurance, copies of email messages, and notes.
- b) What is the benefit to your department by having that file setup in our database? We are able to calendar the beginning date of the contract, as well as send reminder emails for any date of upcoming renewals, expirations etc.
 - a. Example: the initial term of your contract is 9/1/19-8/31/20; we will set expiration alarm for 8/31/20, and also a reminder for perhaps 30-45 days prior to the expiration date, unless denoted specifically in the contract. Some contracts require that we notify the vendor/affiliate 60-90 days ahead of us terminating or renewing a contract.
- c) Many of the contracts we calendar have the option to renew another year or so. The Internal Contract Owner and the Contract Administrator will receive an auto generated email as these dates arise.
- d) We understand that each Department may already be utilizing their own tool or method for in-house calendaring of their contract for expiration dates or renewal dates (**You are the Administrator of your contract. It is up to you/each Department's responsibility to calendar and monitor their own agreements**). AgiLoft offers a courtesy backup by sending out reminder email notification for those upcoming dates. It helps protect WTAMU by staying current with agreement term, so that continuation of services is not disrupted.

6. Does your contract or event require a Certificate of Insurance?

- a) Usually, all agreements that the Contracts Office reviews, edits, or signs will have mention of insurance. Most all of our templates have the language already inserted.

Think about it this way – if you are holding an event on our campus and you have a speaker, a performance, bouncy houses, carnival rides, a vendor performing services on the WTAMU campus, a minimum of general liability insurance, auto liability and worker's compensation are the base requirements. Other insurance coverage may be required depending on specifics of the work or services to be performed. Having WTAMU specified as additional insured (and not just a certificate holder) on the Certificate is required. We will be in contact with System Risk Management to assist.

- b) Insurance amount changes and/or requests for insurance waivers shall be submitted by the Contracts Office to Risk Management for review and opinion.
- g) Don't worry if you are not sure that the Certificate of Insurance you have obtained is sufficient. Send it to ar-ehs@wtamu.edu for review. We will let you know if your vendor/affiliate needs to make some adjustments to it.
- h) Please keep in mind that the final certificate of insurance must be in place **PRIOR** to performance of services.

Please feel free to contact you Contract Administrator any time you have additional questions or concerns at contracts@wtamu.edu. or 806-651-2110.