

CONTRACTS

Helpful Links:

Contract Training: <https://procurement.tennessee.edu/contract-management-training-videos/>

Creating a Vendor: <https://acctspayable.tennessee.edu/creating-a-vendor/>

Forms (standard contract template, NCJ and IT form): <https://procurement.tennessee.edu/contracts/forms/>

Contract Policy: <https://policy.tennessee.edu/policy/fi0420-contracts/>

Accounts Payable Contact (Payment Works): ap_paymentworks@tennessee.edu

Contract Staff:

Erin Young, Contract Manager

865-974-8576

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Email: utkcontracts@utk.edu

Where to Start:

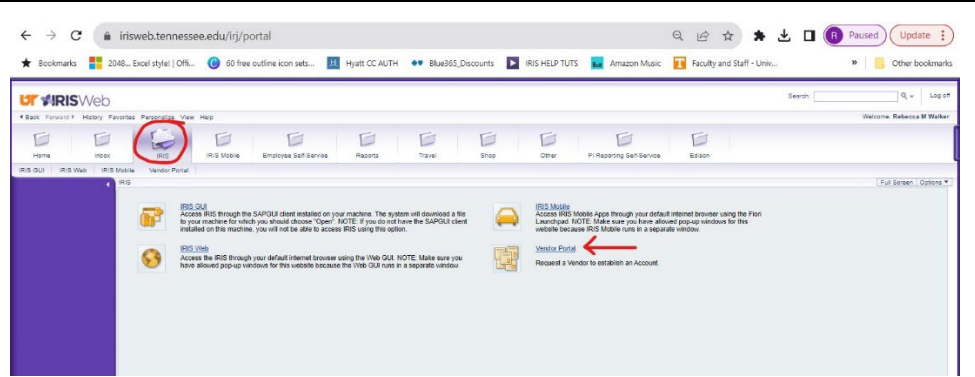
Does UT have a Master Agreement with the vendor?

<p>YES: Does the Master Agreement cover the services in the contract?</p> <p>YES: Submit a Framework Order-No contract needed</p>	<p>I DON'T KNOW:</p> <p>https://procurement.tennessee.edu</p> <p>Click on the box "Purchasing Agreements" on the right side of the page.</p>	<p>NO:</p> <p>Proceed to the next section</p>
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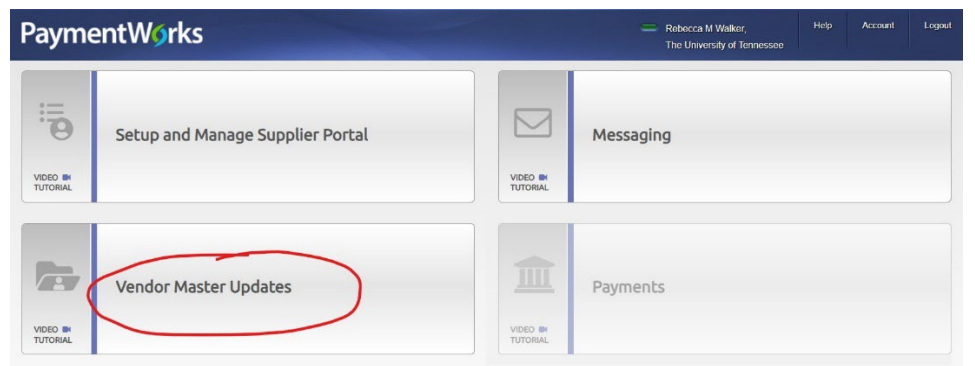
Is the vendor in our system?

NO (OR I DON'T KNOW):

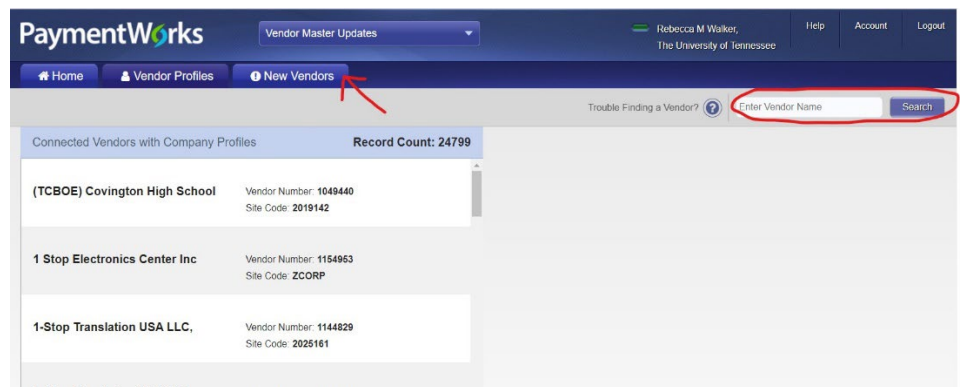
To check, log in to <https://irisweb.tennessee.edu>, click on the "IRIS" tab at the top of the screen, click on the hyperlink "Vendor Portal"



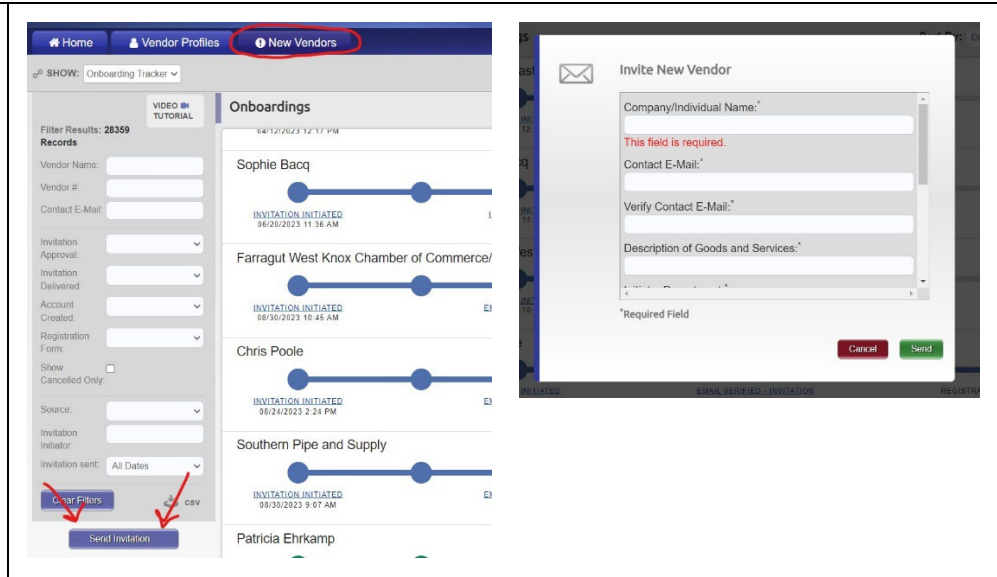
Once you are in the Vendor Portal, click on the box "Vendor Master Updates"



Here, you can search existing vendors and use the "New Vendors" tab to see requested vendors that are in the process of approval.



If your vendor is not in this system, use the “New Vendors” tab and click the “Send Invitation” button at the bottom of the fields on the left of the screen to invite the vendor to complete the process. (Once this is done, you will see the requested vendor in the right pane of this screen.)



YES:

Do you have a contract from the vendor?

NO:

You can use the Standard Contract as a template if the vendor doesn't supply one. This is found here: <https://procurement.tennessee.edu/contracts/forms/> and includes instructions.

YES:

Does the contract require an NCJ? (Is the contract over \$10,000 with no formal bid process through the Office of Procurement?)

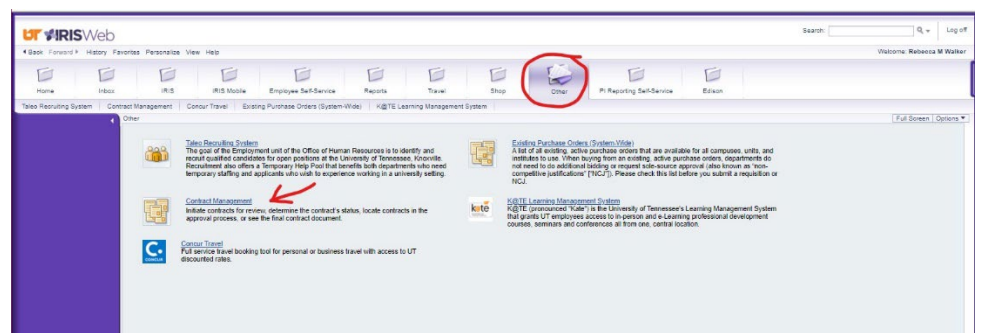
YES:

The Non-Competitive Justification Form can be found here: <https://procurement.tennessee.edu/contracts/forms/> and includes detailed instructions. NOTES: 1. This form should be signed by the requesting department's approver. 2. Remember to enter "See attached NCJ" in the appropriate field on the contract request.

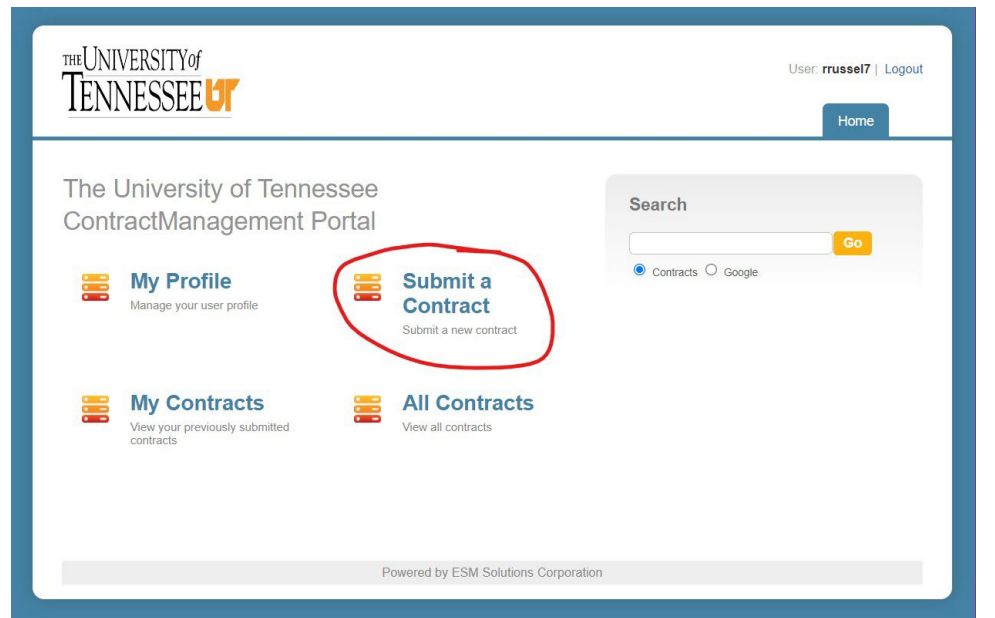
NO:

You are ready to begin entering the contract into the system.

Log into <https://irisweb.tennessee.edu>, click on the “Other” tab, then click on the “Contract Management” hyperlink.

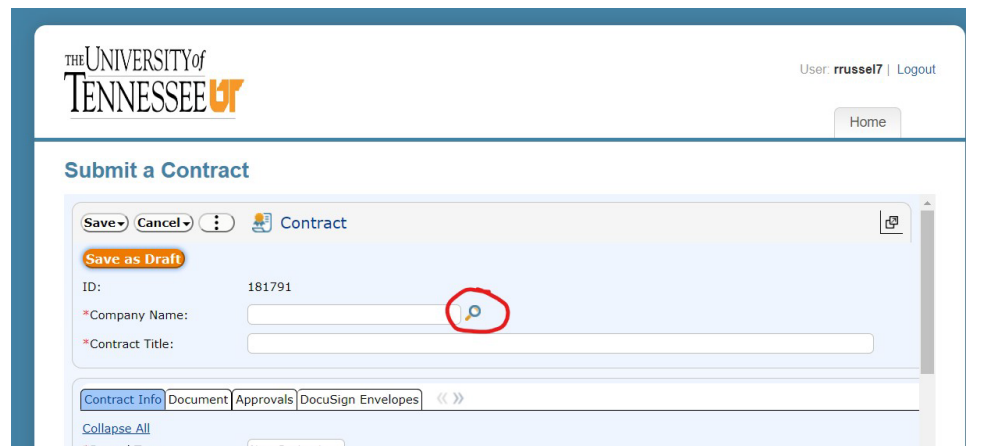


In the Contract System, click on the hyperlink "Submit a Contract"

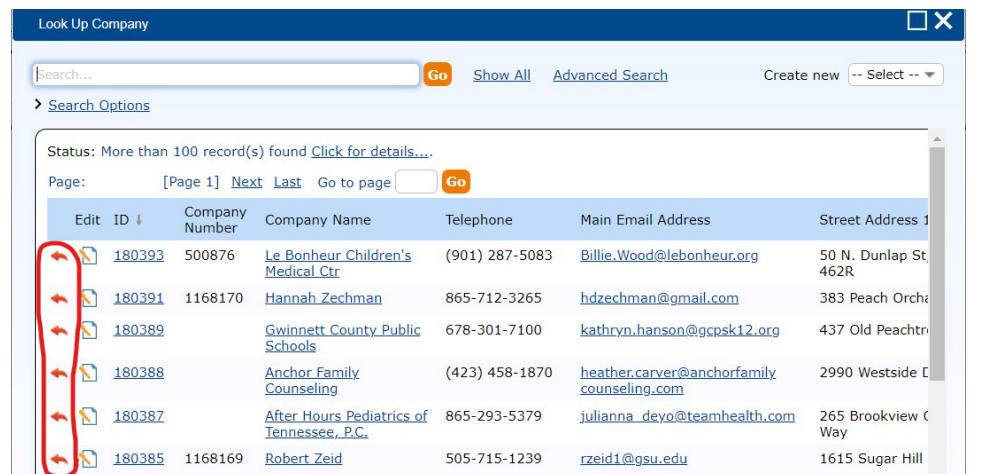


NOTE: You have the option to "Save as Draft" using the orange button at the top of this screen. This is very helpful if you find you are missing something necessary to complete the process (this happens often).

For the "Company Name" field, use the magnifying glass icon to search for the vendor.



Once you have located the vendor, use the red arrow at the front of the listing to import it to the contract.



Give your contract a title- a very brief description of the purpose.

THE UNIVERSITY of TENNESSEE UT

User: rrussel7 | Logout

Home

Submit a Contract

Save Cancel Contract

Save as Draft

ID: 181791

*Company Name:

*Contract Title:

Contract Info Document Approvals DocuSign Envelopes

Use the magnifying glass icon to search for the Account and Budget Entity.

Submit a Contract

Save Cancel Contract

Save as Draft

ID: 181791

*Company Name:


*Contract Title:

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Collapse All

*Record Type: New Contract


Fund & Budget Entity Information

*Account: 

*Account Name:

Funds Center Name:

Account Department Code:

*Budget Entity: 

*Budget Entity Name:

Contract Information

Contract Description:


When you find the account you need, use the red arrow at the front of the listing to import it to the contract.

Look Up Fund

E010149 Go Show All Advanced Search Create new -- Select --

> Search Options

Status: 1 record(s) found, 1 page(s) [Click for details...](#)

Edit	ID ↓	Fund	Fund Name	Department Code	Department Name
	16770	E010149	Associate VC Finance & Administration	U013849049	Assoc VC Finance & Admin

Give a detailed description of the contract terms and purpose. Choose the “Contract Category”, the “Contract Type”, the “Contract Start and End Dates” using the drop-down menus.

Submit a Contract

Use the magnifying glass icon for the “Notification Name(s) field to add the requestor to the notification alerts for the contract approval process.

Click the orange “Add Requester...” button to have notifications of approval sent to you.

Submit a Contract

***FOR PAYABLE AND ZERO DOLLAR CONTRACTS:**
Enter the total amount of the contract in the “Payable Amount” field (\$0 for “Zero Dollar Contract” Type)

Choose the “Competitive Type” from the drop-down menu.

Submit a Contract

Use the magnifying glass icon to search for a current vendor contact.

If you need to add a new contact, use the fields to add their information and click the orange “Save Company Contact” button to save the new contact.

Submit a Contract

Contract Info Document Approvals DocuSign Envelopes << >>


Payee Named in Grant: No

Purchase Order Info - To be completed by purchasing

PO Number: Date for PO:

Vendor Information

Company Number: 1168154

*Vendor Contact(s): No records.  Unlink Views

New Vendor Contact

New Contact First Name: New Contact Last Name:

New Contact Email: New Contact Role:

New Contact Telephone: New Contact Fax:

Save Company Contact

Save and Go to Next Tab

Powered by ESM Solutions Corporation

When everything is entered on this page, click the orange “Save and Go to Next Tab” button.

Submit a Contract

Contract Info Document Approvals DocuSign Envelopes << >>


Payee Named in Grant: No

Purchase Order Info - To be completed by purchasing

PO Number: Date for PO:

Vendor Information

Company Number: 1168154

*Vendor Contact(s): No records.  Unlink Views

New Vendor Contact

New Contact First Name: New Contact Last Name:

New Contact Email: New Contact Role:

New Contact Telephone: New Contact Fax:

Save Company Contact

Save and Go to Next Tab

Powered by ESM Solutions Corporation

On the next page, click the orange “Add New Document” button to attach the contract, NCJ and/or IT Questionnaire (if required), and any other supporting documentation.

Submit a Contract

Save Cancel Contract

Save as Draft

ID: 181791

*Company Name: Summit Consulting Services Inc


*Contract Title: Consulting for Kim McCulloch

Contract Info Document Approvals DocuSign Envelopes << >>

Collapse All

Contract Documents

Contract Documents:

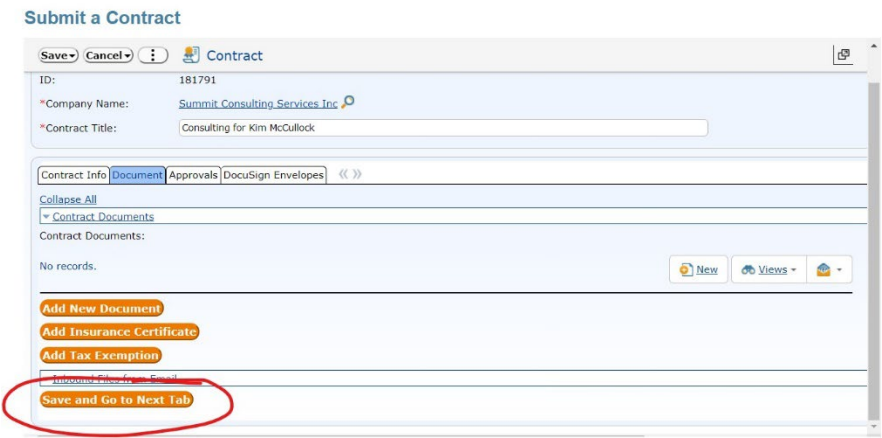
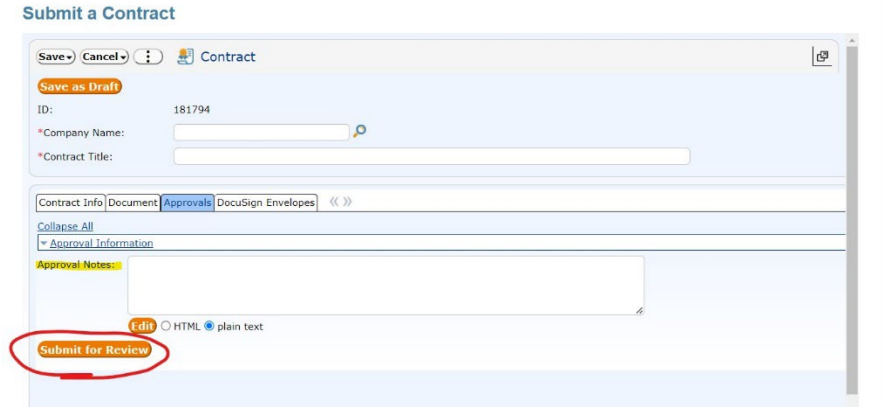
No records.  Views

Add New Document

Add Insurance Certificate

Add Tax Exemption

Inbound Files from Email

<p>When all documents have been attached, click the orange “Save and Go to Next Tab” button.</p>	 <p>The screenshot shows the 'Submit a Contract' interface with the 'Document' tab selected. The 'Save and Go to Next Tab' button is highlighted with a red circle. Other buttons like 'Add New Document', 'Add Insurance Certificate', and 'Add Tax Exemption' are also visible.</p>
<p>You can add a note for approvers here.</p> <p>To submit the contract, click the orange “Submit for Review” button.</p>	 <p>The screenshot shows the 'Submit a Contract' interface with the 'Approvals' tab selected. The 'Submit for Review' button is highlighted with a red circle. The 'Approval Notes' field is also visible.</p>

AMENDING A CONTRACT

When amending a contract, remember to:

- Change the “Record Type” field to “Amendment”
- Use the current date as the “Contract Start Date”
- *If a “Payable Contract”, only enter the difference between the original contract amount and the increased amount for the amendment in the “Payable Amount” field. (i.e. the original contract was for \$1,000 and the amendment is to increase it to \$1,500 total, the new “Payable Amount” is \$500 on the amendment).*

SPECIFIC TO SOFTWARE

Software requires additional information in the “Contract Description” field:

- Are there terms posted on their website that you must accept? Please download and attach these with the contract entry.
- Will the vendor invoice the university?

You also need to complete the IT Questionnaire here:

<https://procurement.tennessee.edu/contracts/forms/> and attach the approved document to the contract entry. NOTE: this form should be signed by the requesting department's approver.

SPECIFIC TO HOTEL/CATERING EVENTS

Hotel/Catering Contracts require additional information in the "Contract Description" field:

- Include date of event in the "Contract Title" field
- Include quote cut-off date (if applicable) in the "Contract Description" field
- Include deposit due date (if applicable) in the "Contract Description" field