



Contract and Procurement Solicitation Intake Form

- Updated Process -- Review Instructions Below -

To clarify and expedite the review process, please complete and submit this Intake Form each time a UT institution forwards a contract or procurement solicitation to the UT System Office of General Counsel for review. PLEASE COMPLETE ONE (1) INTAKE FORM PER CONTRACT OR PROCUREMENT SOLICITATION.

To do so, save a copy of the Intake Form to your computer or network drive, complete the Intake Form for the specific contract or procurement solicitation you are working on, then include the completed Intake Form in your email with the contract or procurement solicitation (as well as all relevant documentation) and forward to OGC for further review. Please send the email to OGC_Intake@utsystem.edu.

Each institution is responsible for (1) review and approval of all legal and business terms; (2) processing all contracts in accordance with UTS 145 Processing of Contracts; (3) compliance with applicable procurement law, rules, policies and procedures; and (4) obtaining any required approvals from UT System Administration and the Board of Regents or its delegates.

1. INSTITUTION: (Select from Drop-Down) 2. VENDOR NAME:

3. CONTRACT TITLE AND NUMBER, IF ANY:

4. ANTICIPATED CONTRACT VALUE FOR INITIAL TERM AND ALL RENEWALS :

5. TYPE OF SUBMISSION: RISK LEVEL:

5-A. IF "NEW CONTRACT (VENDOR PERFORMED)," IDENTIFY PROCUREMENT METHOD USED:

5-B. IF "OTHER," "UNKNOWN" OR "NOT APPLICABLE," EXPLAIN:

5-C. IF "NEW CONTRACT (VENDOR PERFORMED)" OR "AMENDMENT TO EXISTING CONTRACT," DID THE INSTITUTION PREPARE A "BEST VALUE" PROCUREMENT JUSTIFICATION ANALYZING EACH MANDATORY EVALUATION CRITERION UNDER SECTION 51.9335, 73.115 OR 74.008, TEXAS EDUCATION CODE? Yes No

6. SUBJECT MATTER OF CONTRACT OR PROCUREMENT SOLICITATION:

7. HAS THE INSTITUTION WORKED WITH ITS EIR COORDINATOR TO COMPLY WITH ACCESSIBILITY LAWS, REGENTS' RULES, POLICIES AND PROCEDURES, INCLUDING [UTS150 ACCESS BY PERSONS WITH DISABILITIES TO ELECTRONIC AND INFORMATION RESOURCES PROCURED OR DEVELOPED BY THE UNIVERSITY OF TEXAS SYSTEM ADMINISTRATION AND THE UNIVERSITY OF TEXAS SYSTEM INSTITUTIONS?](#) Yes No

7-A. EIR COORDINATOR CONTACT INFO:

8. HAS THE INSTITUTION WORKED WITH ITS EMPLOYEE RESPONSIBLE FOR COMPLIANCE WITH PRIVACY LAWS, REGENTS' RULES, POLICIES AND PROCEDURES, INCLUDING [THE FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT](#) (FERPA), [THE HEALTH INSURANCE PORTABILITY AND ACCOUNTABILITY ACT](#) (HIPAA) AND [UTS183 MAINTENANCE OF EDUCATION RECORDS SUBJECT TO FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT?](#) Yes No

8-A. PRIVACY COORDINATOR CONTACT INFO:

9. HAS THE INSTITUTION WORKED WITH ITS EMPLOYEE RESPONSIBLE FOR COMPLIANCE WITH DATA SECURITY LAWS, REGENTS' RULES, POLICIES AND PROCEDURES, INCL. [UTS165 INFO. RESOURCES USE AND SECURITY POLICY](#)? Yes No

9-A. DATA SECURITY COORDINATOR CONTACT INFO:

10. BOARD APPROVAL: IS APPROVAL BY THE BOARD OF REGENTS VIA THE AGENDA OR CONSENT AGENDA REQUIRED? (See [Regents' Rule 10501 Delegation to Act on Behalf of the Board](#) to determine whether Board approval is required.) Yes No

10-A. IF YES, SUBMIT A COPY OF THE AGENDA OR CONSENT AGENDA ITEM PREPARED BY YOUR INSTITUTION.

10-B. IF NO, IDENTIFY THE APPLICABLE EXCEPTION TO BOARD APPROVAL. (For more information, see [Regents' Rule 10501 Delegation to Act On Behalf of the Board.](#))

11. DATE SUBMITTED:

REQUESTED DEADLINE:

We will provide you with initial comments and recommendations as soon as we are able. Please be aware that, depending on OGC workload and contract complexity, it is the Contracting & Procurement Practice Group's goal to provide initial comments within 3-4 weeks after receipt of all requested documentation. Budget time accordingly for OGC, System, and BOR approvals. All expedite requests must be discussed with the assigned attorney. Notations "need ASAP" or "expedite" alone will not provide sufficient information to justify prioritizing one contract or solicitation over others.

Explain any deadline or time frame issues:

12. IDENTIFY and provide COPIES of or LINKS to any policies, regulations, or laws that were relied on in developing this contract or solicitation:

13. IDENTIFY all of the applicable Office of General Counsel (OGC) checklists that apply to this transaction:

- General Procedure Contracts Clinical Trial Agreements Material Transfer Agreements
 Software and Database Licenses Sponsored Research Agreements Construction

13-A. HAS THE CONTRACT BEEN REVISED TO REFLECT THE RESULTING CHECKLIST RECOMMENDATIONS? If Yes, include a copy of the Checklist Recommendations with the contract documents. If No, OGC requires contracts to be modified based on the Checklist Recommendations prior to OGC submission. If you require assistance, please contact OGC_Intake@utsystem.edu or call (512) 499-4462. Yes No

14. INSTITUTION REVIEW AND APPROVAL:
Indicate who at the Institution has reviewed and approved this contract or solicitation.

15. LEGAL REVIEW: If this contract was reviewed by institutional legal counsel, please provide contact information.

Name:

Phone No.:

Email:

16. CONTRACT ADMINISTRATOR CONTACT INFORMATION:

Name: Phone No.:
 Email:

17. CONTENT CONTACT INFORMATION:

Name: Phone No.:
 Email:

18. PRIOR OGC REVIEW: If this contract or solicitation or a similar contract or solicitation was reviewed by OGC, please provide the name of that current or former OGC attorney:

If Other, Name:

19. LIST AND ATTACH the main contract document(s) and each attachment or exhibit to those document(s). *If your submission is a contract or amendment that requires approval by the Board of Regents, also submit a copy of the Agenda or Consent Agenda item prepared by your institution. To expedite OGC review, make every effort to submit all contract documents in modifiable electronic format (preferably Microsoft Word).* If particular contract provisions are problematic or were difficult to negotiate, list those provisions and explain the problem or difficulty.

Document Name	Number of Pages	MS Word Format?	Troublesome Provisions?
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

Explanation of Troublesome Provisions:
 (For example: No troublesome provisions. Minor modifications were made to Standard Terms and Conditions (Rider 103), sections 5 and 18, and the Travel Policy (Rider 107). All three instances are highlighted in the documents attached.)

20. OTHER INFORMATION:

Provide any other comments or information that may assist in the review and approval of this contract.

QUESTIONS OR INQUIRIES ABOUT THE SUBSTANCE OR STATUS OF THE REVIEW OR APPROVAL OF THIS CONTRACT OR SOLICITATION SHOULD BE DIRECTED TO:

Office of General Counsel
 OGC_Intake@utsystem.edu or (512) 499-4462

Attach completed Intake Form and all relevant documentation to an email and forward package to OGC_Intake@utsystem.edu.