**GENERAL INFORMATION**

The University of Houston System is required to comply with state contract reporting requirements. To help ensure compliance, the UHS Contracts Page will be used as a single point of data entry for all contract information that the University is required to report to the Legislative Budget Board (LBB) either by statute or the General Appropriations Act (GAA). Purchasing staff will use the data collected from this page to report contracts to the LBB.

Sponsored research consultant agreements and sub-recipient agreements using fund 5 (except for fund 5999) must be entered into the UHS Contracts Page via RC730 requisition. The following table shows the different types of sponsored research purchases and each of its requirements.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Procurement Type** | **Description** | **Requisition Required** | **UHS Contracts Page Required** | **Requisition Business Unit** |
| Consultant Agreement | Person hired in a professional capacity to provide specific expertise in the technical area of the project for a specified period of time under a sponsored agreement. | Yes | Yes | RC730 |
| Sub-recipient Agreement | Under 2 CFR 200.92, the Uniform Guidance, Sub-award means an award provided by a pass-through entity to a sub-recipient for the sub-recipient to carry out part of a Federal award received by the pass-through entity. | Yes  (created by DOR) | Yes | RC730 |
| All Other Services Agreements (*except for consultants or sub-recipients)* | Services are works or duties provided to the University, and are provided by business organizations or individuals. Services may be standalone (one time) or repetitive or ongoing. | Yes | Yes | CN730  CN783  RC730 (*If paid on grant cost center)* |
| Goods (i.e., no terms and conditions) | Purchase of goods processed through purchasing department. Goods are tangible, physical items. Goods are standalone purchases – once it is purchased, the relationship ends. | Yes | No | 00730  00783 |

*Notes:*

1. *Requisitions for Sub-recipient Agreements will be created by DOR. All other requisitions will be created by UH departments.*
2. *The partially executed agreement should be uploaded to the requisition to be routed to OCG for review and execution. OCG will upload the fully executed signed agreement to the UHS contract page.*
3. *In an effort to simplify the process and reduce the administrative burden on campus, RC730 requisitions no longer require DOR forms; “Sponsored Project Contract Coversheet” and “Recommendation for Award”.* *Moving forward, please only use the Contract Cover Sheet and Recommendation for Award Form as per the Contract Administration Guide, regardless of the source of funds.*

The University is required to report contracts to the LBB as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| **TYPE OF CONTRACT** | **VALUE THRESHOLD** | **REPORTING TIMEFRAME** | **LOCATION** |
| All | > $50,000 | Within 30 days of award or amendment | GAA, Article IX §7.04  Government Code §322.020 |
| Non-Competitive/Sole Source | > $1,000,000 | Within 15 days of award | GAA, Article IX §7.11 |
| Emergency | > $1,000,000 | Within 5 days of award | GAA, Article IX §7.11 |
| All | > $10,000,000 | Within 15 days of award | GAA, Article IX §7.11 |

**CONTRACT AMENDMENTS**

For reporting purposes, contract amendments will be treated as separate contract entries. Departments will need to create a new contract in the system to record the amendment and link it to the requisition.

See example below:

Original Contract (executed 8/22/2019)

Contract ID: K-19-12345

Total Amount: $100,000

Term: 9/1/2019 – 8/31/2022

Amendment 1 (executed 7/15/2022)

Contract ID: K-19-12345-1

Total Amount (original + amendment): $175,000

Term (original + amendment): 9/1/2019 – 8/31/2024

FY20 - Department creates requisition #1 and enters contract K-19-12345

FY21 - Department creates requisition #2 and links it to contract K-19-12345

FY22 - Department creates requisition #3 and links it to contract K-19-12345

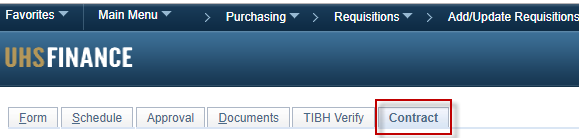
FY23 - Department creates requisition #4 and enters amendment K-19-12345-1

FY24 - Department creates requisition #5 and links it to amendment K-19-12345-1

**INSTRUCTIONS**

**Step 1:** Create requisition by following the “How to create a requisition” training located at <http://www.uh.edu/office-of-finance/purchasing/Purchasing%20Training/>

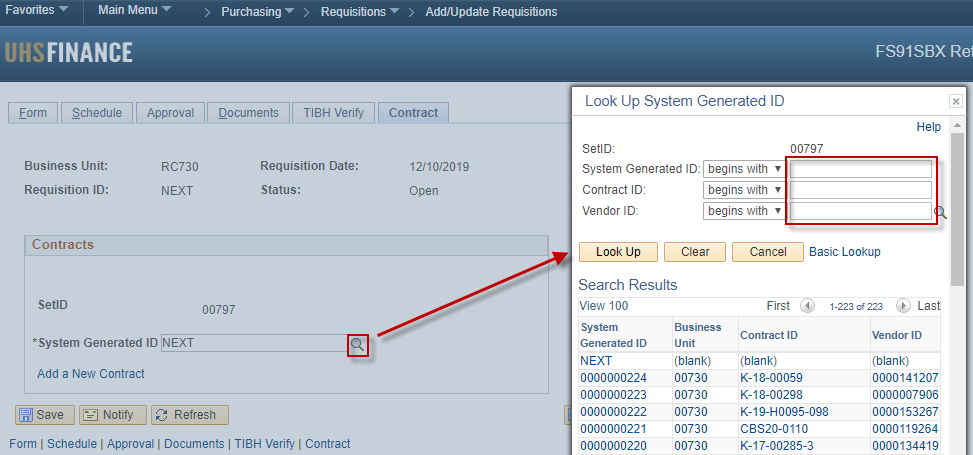
**Step 2:** Click on the“Contract” tab. Expense contracts can be created and/or added (if contract was previously created) from this page.



* Add an existing contract to the requisition by going to the “Add Existing Contract” section below. Note that you can only add an existing contract if someone already created that contract.
* Create a new contract by going to Step 3.

**Add Existing Contract**

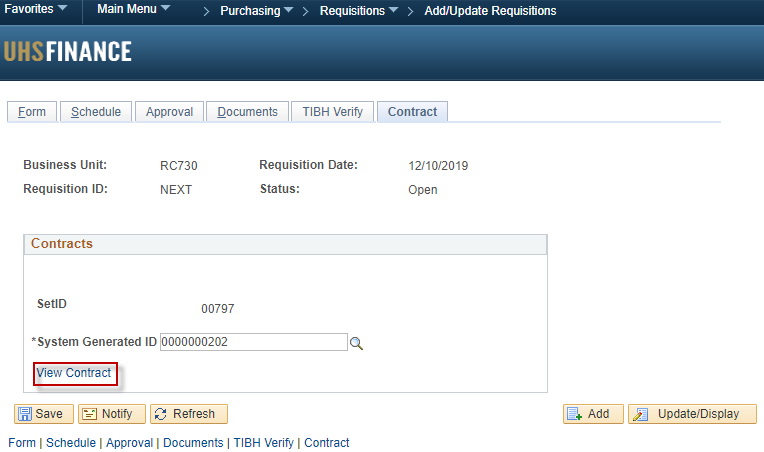
1. Click the search  icon. The Look Up page is displayed.



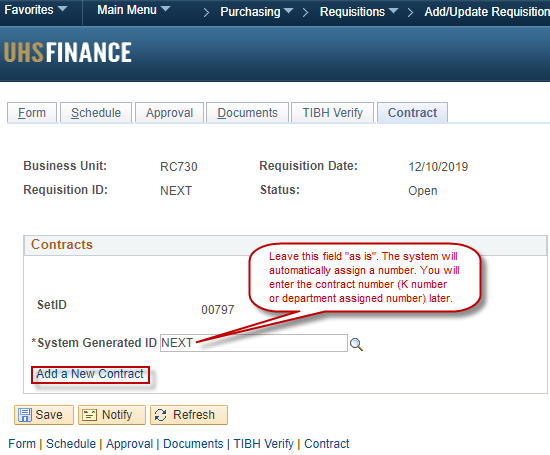
1. You can search for contracts by:

|  |  |
| --- | --- |
| System Generated ID | This is a 6-digit unique number that is automatically generated by the system once a contract is saved. |
| Contract ID | K Number assigned by OCA or department assigned number if no K number available. |
| Vendor ID | Unique number assigned to vendors that receive non-payroll payments from UH System. |

1. Once contract is found, select to add and click save.
2. You can view the selected contract by clicking on the “View Contract” link.



**Step 3:** Click the “Add New Contract” link. Do not enter anything on the “System Generated ID” field.



**Step 4:** Fill out all the applicable fields. Use the following definitions to determine what information needs to be entered.

|  |  |
| --- | --- |
| Contract ID | Use the Contract ID (K Number) assigned by the Office of Contract Administration (OCA). Use department-assigned contract number only if there is not a K number available. The K number or department-assigned number must be stamped on all contract documents in order for approver to verify contract ID entered in the UHS contracts page is correct. |
| Amended | Only select this box if contract has been amended. |
| Subject | The subject provides a description of the contract’s general purpose. Example: Data analysis and research study |
| Competitively Procured | This field is used to differentiate between competitively and non-competitively procured contracts. |
| Revenue Generating | Do not check this box. This is only used for revenue contracts |
| Agency Approval Date | The Agency Approval Date specifies the date on which final approval was given to proceed with contracting for the purchase or sale of goods and/or services. The Agency Approval Date cannot be later than the Solicitation Post Date or the Award Date.  Please use one of the options below:   * Formal bid - date formal solicitation was posted to the ESBD. * Informal bid - dates bids were requested from vendors. * Sole source or emergency - date Purchasing signed the sole source justification form or approved the emergency purchase. |
| Award Date | The Award Date is the date the University executed (signed) the contract. |
| Expiration Date | The Expiration Date is the date when the contract will end pursuant to its terms and conditions. |
| Vendor ID | Unique number assigned to vendors that receive non-payroll payments from UH System. |
| Address | Use vendor address listed on contract. If address is not found use the same address as PO. |
| Current Value | The Current Contract Value includes the value of the contract, any amendments, and any exercised extensions or renewals. |
| Maximum Value | The Maximum Contract Value field should include the value of the contract, amendments, and all potential extensions or renewals that have not been exercised. The total amount both currently and potentially obligated. |
| Solicitation Posting Date | Enter date solicitation was posted for public bidding OR leave blank if not applicable. This is normally found on the first page of the solicitation. |
| Number of Bids Received | The # of Bids Received is used to indicate the number of bids that the University received in response to the formal/informal solicitation. Enter 1 if state contract, cooperative contract, or sole source purchase. |
| Solicitation Number | Enter solicitation number or NA if not applicable. |

**Step 5:** Attach contract files.

**Step 6:** Save & Submit.