

Contracting Procedures for Contracts Paid with Non-Grant Related Funds

(Contracts Paid with Grant Related Funds are Processed Through the Office of Research and Sponsored Programs using their procedures)

Please use the contract/amendment templates available on Business Affairs' website. Someone from the UNO department desiring the service should complete the contract template by filling in the blanks. The templates contain some areas in blue colored font which are intended to be instructional and should be overwritten or deleted.

The following is our normal contracting process:

- 1) The department does their best to fill in the blanks on the template and complete the draft contract (Business Affairs' Contract Administrator is always available for discussion if there are issues)
- 2) The draft is emailed to Business Affairs' Contracts Administrator
- 3) The Contracts Administrator reviews the draft and provide comments/suggestions if applicable
- 4) A final version is completed and emailed to the Contracts Administrator
- 5) The Contracts Administrator has the contract signed by the Vice President for Business Affairs, and then informs the department that the signed contract is ready.
- 6) The signed contract can be emailed to the department or someone from the department can pick up the signed originals and delivers them to the contractor for signature
- 7) The contractor signs them, keeps one and returns the other to the department, either attached to an email or a hard copy original
- 8) Someone in the department makes a copy for their files and sends the original to the Contracts Administrator (email or hard copy)
- 9) Upon completion of the contract term a performance evaluation (see Business Affairs' website for template) is completed by the person responsible for monitoring the contract and emailed or mailed to the Contracts Administrator

For contracts over \$20,000 and up to \$49,999.99 the first 6 steps are the same except we must use hard copy original documents because contracts over \$20,000 must be sent to the LA State Office of Contractual Review (OCR) for approval, the last few steps change and a few are added.

- 7) The contractor signs them and returns all originals to the department. The contract isn't considered fully executed until it is signed by OCR (clause 17 in the attached template specifically states this)
- 8) Someone in the department sends all of the originals to the Contracts Administrator.
- 9) The Contracts Administrator sends a form to the Louisiana Department of Civil Service answering several questions regarding the work which allow Civil Service to confirm that the contractor is actually performing as an independent contractor rather than as an employee. Civil Service usually approves this form in a day or two. The questions on the form are as follows:

Will this contract result in the removal of duties or responsibilities from one or more classified state employees? Yes No

Will this contract establish a relationship wherein an employee or official of the state

a. determines the work hours of the person performing the contractual services

Yes No

b. determines the day to day duties of that person

Yes No

c. approves the absences from the work place of that person

Yes No

- 10) The Contracts Administrator sends the originals contracts to the LA State Office of Contractual Review (OCR) along with a cover letter, approved Civil Service form, budget form, a W-9 for the contractor and any other required documents.
- 11) OCR reviews the contract. Sometimes they ask for changes to be made to the contract, in which case the contractor's signatory and the University's signatory both initial the changes and return the page(s) that include changes to OCR by email.
- 12) OCR approves the contract and mails the fully executed originals to the Contracts Administrator.
- 13) The Contracts Administrator receives the originals, keep one, and lets the department know that the fully executed originals are ready to pick-up.
- 14) Someone from the department picks up the fully executed originals, keeps one (if available or makes a copy if not) for the department and gives one to the contractor.
- 15) Upon completion of the contract term a performance evaluation (see Business Affairs' website for template) is completed by the person responsible for monitoring the contract and emailed or mailed to the Contracts Administrator. OCR requires the performance evaluation to be signed by the UNO representative completing it.