

## Contract Routing Sheet

### INSTRUCTIONS FOR FORM

- A contract routing sheet (CRS) is required for ALL contracts.
- If all requested information is not submitted with the contract; the contract routing sheet and any attachments will be returned to the department for completion. The contract will not be reviewed until all necessary documentation is submitted.
- If the contract is for **software, licenses or web applications** the following criteria must be met:
  - All software and web applications must be reviewed by the Office of Technology (OoT) prior to the contract being routed to the Contracts Department for review.
    - Please forward the Contract Routing Sheet to Cori Trevino, Dennis Hoebee and Clay Till for review and signature prior to submitting all documents to [TWUContracts@twu.edu](mailto:TWUContracts@twu.edu).
  - **Risk Assessment** is needed for ALL software purchases.
    - If you do not have a copy of the risk assessment, please send an email to the OoT Support Desk and open a ticket.
    - Once the risk assessment is obtained, attach a copy to the contract routing sheet and contract and submit to [TWUContracts@twu.edu](mailto:TWUContracts@twu.edu).
- If the contract is on a **19 account**; the contract routing sheet must be signed by the Office of Research & Sponsored Programs prior to being forwarded to Procurement and Contract Services (PCS).
- If the services or goods are being purchased as a **Sole Source**; the sole source form must be completed, signed by your department, and forwarded to PCS along with the contract routing sheet.
  - Once PCS has reviewed and approved the form, the sole source form will be uploaded in TBUY and you will not be required to attach the form when submitting the requisition.
- Most contracts require liability insurance to be provided by the vendor providing the service or goods.
  - The department must obtain a copy of the **Certificate of Liability (COL)** from the vendor and forward it along with the contract routing sheet when submitting the contract to PCS.
- If the contract is the result of an **informal bid**; you must attach copies of the quotes to the contract routing sheet when submitting to PCS.
  
- *Contracts, Contract Routing Sheet, and all applicable attachments should be emailed to [TWUContracts@twu.edu](mailto:TWUContracts@twu.edu). Procurement and Contract Services will not be liable for contracts sent through campus mail.*

TWU Procurement and Contract Services 940-898-3535

Email completed form to [twucontracts@twu.edu](mailto:twucontracts@twu.edu)

*Please complete the information below, down to the double line. Contract Routing Sheet must be signed by the department.*

Vendor's Name

Vendor's Phone

Vendor's Contact

Vendor's Email

Is Vendor a TWU employee or related to a current TWU employee? Yes No

Is this a new vendor? Yes No

Is this contract a result of a Formal Bid Yes No

*If yes, please send completed New Supplier Form, W9, and Vendor Electronic Funds (EFT) Authorization Form. Forms can be found by clicking here.*

If yes, please enter the bid number

Description of Contract (50 char. max):

Is this an expense contract? Yes No

Is this a revenue contract? Yes No

Department Name:

Department Account Number:

Vendor TIN#:

Department Contact:

Contact Email:

**Review/Approval:**

**Account Approver** \_\_\_\_\_ Date: \_\_\_\_\_

*REQUIRED ON ALL CONTRACTS - By signing, department is verifying that the contract addresses all of their business needs and that the funding (if required) is in place.*

**Office of Technology** \_\_\_\_\_ Date: \_\_\_\_\_

*Review required on all web application or software contracts. Risk assessment documentation must be attached.*

**Office of Research & Sponsored Programs** \_\_\_\_\_ Date: \_\_\_\_\_

*Review required on all contracts using an account number beginning with 19.*

**Procurement and Contract Services** \_\_\_\_\_ Date: \_\_\_\_\_

*REVIEW REQUIRED ON ALL CONTRACTS*

**Compliance and General Counsel** \_\_\_\_\_ Date: \_\_\_\_\_

*Review required on all contracts using non-standard contract form.*

**Risk Management** \_\_\_\_\_ Date: \_\_\_\_\_

*If applicable*

**Finance & Administration** \_\_\_\_\_ Date: \_\_\_\_\_

*Delegated signatory for all University contracts not exceeding \$500,000.*

**President & Chancellor** \_\_\_\_\_ Date: \_\_\_\_\_

*Required signatory (unless delegated otherwise) on University contracts, amendments and renewals in the amount of \$100,000 to \$500,000.*

Note, BOR approval is required if contract is greater than \$500,000 per year or term is longer than 4 years (unless cancellation clause is 120 days or less). All consulting contracts must go to BOR for approval. For consulting contracts greater than \$25,000 on state funds, please call 898-3812

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