SOMEONE WANTS TO CREATE AN AGREEMENT

Is VC level to office in record database an existing agreement with the same entity?

Contact VC level office to search database for existing agreement

Initiator goes to central/common website for boiler plate/resources, decision tree

Add UAF boiler plate info or template if possible

Determine what type of agreement is needed

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Utilize template – specific or general available

Send to 1st level review: D/D, AVC, etc. if needed

Are additional reviews/protocols required?

Complete 2nd level review: D/D, AVC, etc. if needed

Bring in any other responsible parties/reports for consult i.e. SW land, SAC, BOR

Is agreement approved?

Submit to appropriate VC level office, edit if needed

Send to GC for review, notify initiator

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Agreement signed appropriate authority (Chancellor/President)

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Send UA signed document to external entity with request for return of fully exs. Doc.

Receive document and scan into Onbase

FULLY EXECUTED, DOC STORED IN ONBASE

Is agreement still valid?

Amend or renew as necessary; utilize amendment or renewal template

Review old terms and conditions, use if applicable

Begin template for new agreement

Does proposed activity fall under existing agreement?

N

Y

Is it from an external entity?

Y

N

Determine if it is from an external entity

Y

N

Use VC level to office to search database for existing agreements with the same entity

Process: Someone wants to create an agreement.

1. Contact VC level office to search database for existing agreement.
2. Initiator goes to central/common website for boiler plate/resources, decision tree.
3. Add UAF boiler plate info or template if possible.
4. Determine what type of agreement is needed.
5. Utilize template – specific or general available.
6. Send to 1st level review: D/D, AVC, etc. if needed.
7. Are additional reviews/protocols required?
8. Complete 2nd level review: D/D, AVC, etc. if needed.
9. Bring in any other responsible parties/reports for consult i.e. SW land, SAC, BOR.
10. Is agreement approved?
11. Submit to appropriate VC level office, edit if needed.
12. Send to GC for review, notify initiator.
13. Agreement signed appropriate authority (Chancellor/President).
14. Send UA signed document to external entity with request for return of fully executed document.
15. Receive document and scan into Onbase.

Result: Fully executed, document stored in Onbase.

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