

Contract Management Procedure

Intent:

The University of Wisconsin – Whitewater (University) supports the implementation and continuous management of a shared folder for efficiently organizing finalized contracts.

Scope:

This procedure applies to all University employees who may be granted access to the contract management shared folder.

Definitions:

Contract. A contract is an agreement between two or more parties which creates an obligation to do or not to do a particular thing. A contract’s essential components include competent parties, subject matter, a legal consideration, mutuality of agreement and mutuality of obligation. A contract may involve the procurement of goods and services by one party or parties and the rendering of goods and services by the other party or parties. Contracts can be fixed-price contracts, cost-plus fixed-fee contracts, cost-reimbursement contracts, or cost-sharing contracts. Other examples of contracts include but are not limited to Agreements, Memorandums of Understanding (MOU), and Memorandums of Affiliation (MOA).

For purposes of this Practice Directive, a “Contract” is defined as “a document with terms and conditions”. Examples of this include, but are not limited to: Memorandums of Understanding, Memorandums of Agreement, Affiliation Agreements, Purchase Orders, etc. Any contract that requires adherence to terms or conditions that one of the two parties must fulfill (whether or not the contract is monetary in nature) then it requires approval from a position on campus with the appropriate delegated authority to execute.

You cannot enter into a contract unless you possess the appropriate delegated authority to do so. See the [Delegation of Authority Practice Directive and Procedure](#) for more information.

Contract Folder Administrator. A Contract Folder Administrator is a University employee who has been granted access to place finalized contracts in the shared folder and make adjustments to the saved files names or remove files as appropriate.

Contract Contributor. A Contract Contributor is a University employee who utilizes contracts as part of their operations, such as a director or manager of a department or division. Contract Contributors will often have delegated authority that relates to one or more types of contracts. Contract Contributors have the right to read-only access of the Central Contract Repository shared folder.

Central Contract Repository. The Central Contract Repository is the shared folder name used to store fully executed contracts.

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Procedure:

This procedure provides an overview of key practices to ensure consistent execution and utilization of contract-related shared folders.

Overview:

The primary department or division associated with a contract is responsible for the contract. Contract Folder Administrators receive and review finalized contracts for proper signature and evaluate against Delegation of Authority Letters to ensure compliance before uploading the contracts into the Central Contract Repository. The Central Contract Repository only stores fully executed contracts, and will be organized by contract type to ensure ease of access.

All files maintained in the Central Contract Repository must be saved as PDF type documents and must conform to the following naming convention:

- For the core contract document: COMPANY_DIVISION CODE_MMDDCCYY.pdf
- For any related attachments: COMPANY_DIVISION CODE_MMDDCCYY_[attachment type].pdf

Please refer to the [Department Code Structure](#) for determining the appropriate division code numbering.

Related attachment documents will be included in the Central Contract Repository for contracts executed on January 1, 2019 or later.

Ongoing Management Practices:

Contract Folder Administrators shall establish and maintain files within these Central Contract Repository shared folders.

The Purchasing Agent Program Supervisor will conduct a quarterly review of contracts in the repository to evaluate contracts that will expire in the next three months. The Purchasing Agent Program Supervisor will reach out to the appropriate contact at the University to start the process of renewing, replacing or allowing the contract to expire as appropriate.

An employee's access to the Central Contract Repository shared drive will be granted or removed in accordance with their Delegation of Authority status. Visit our [Delegation of Authority Practice Directive and Procedure](#) for more information.

Resources:

- [Contract Management Practice Directive](#)
- [Department Code Structure](#)
- [Delegation of Authority Practice Directive](#)
- [Delegation of Authority Procedure](#)

Administration:

Approval Details

Approval Authority:	UW System: UWS Fiscal and Accounting General Records Schedule , UWS Purchasing and Procurement General Records Schedule
Approval date:	01/01/2019
Version no:	V1.0
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Revision History

Version	Revision date	Description of changes	Author
1.0	01/01/2019	Procedure established	Quality Assurance Improvement Manager

Contact Person/Unit

Contact Person/Unit:	Vice Chancellor of Administrative Affairs
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Keywords

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