



Addy Tips



UCF Finance & Accounting, Financials Support Services

Approval Process for Requisitions Needing Legal Review



Presented by:

Rebecca Matos, Sr. Administrative Assistant

Amanda Wilcox, Office Assistant

Contract Policy

- ☞ **Contract:** An agreement between 2 or more persons that creates an obligation to do or not to do a particular thing.
- ☞ This policy applies to all contracts involving the university or its personnel or resources.
- ☞ To protect the university the General Counsel's Office must review every contract to ensure that the legal terms are appropriate & acceptable to the university's interest.



Contract Policy Cont.

- ➡ **The only person authorized to sign contracts on behalf of the university is the President, although he may delegate this authority to a limited group of people.**
- ➡ **Signing contracts without such authority exposes the individual to personal liability & possible disciplinary actions.**
- ➡ **The General Counsel's office maintains a record of all contract delegations.**



Sole Source

- **Sole Source: a commodity or contractual service available from a single source and is exempt from the competitive solicitation process.**
- **Commodities or contractual services over \$50,000 need a Sole Source Certification.**
- **The Sole Source Cert. along with the purchase requisition & any further documents (contracts, terms & conditions) associated with the requisition need to be forwarded to the General Counsel's office.**



Sole Source Cont.

- ➡ **The Sole Source Certification can be found on the Purchasing website at:**
- ➡ **<http://www.purchasing.ucf.edu/> and click on forms on the left side of the screen**



Contract/ Sole Source Procedure

- ☞ **What happens to the contracts when they come through the General Counsel's office?**
 - ☞ **Contracts are logged into our database.**
 - ☞ **They are distributed to the appropriate attorney.**
 - ☞ **After the GC office reviews & signs off on the legal content, it is forwarded to the appropriate unit for signature and execution.**



Contract/ Sole Source Procedure Cont.

Example:

Purchasing

 Contracts exceeding \$1 million are forwarded to the vice president for administration & finance and then signed by the president.

 Affiliation agreements are forwarded to the provost for academic affairs for signature prior to being returned to the appropriate unit for signature & execution.





Addy Tips

UCF Finance & Accounting, Financials Support Services



Approval Process for Requisitions Needing Legal Review





Step	Action
	<p>If the requisition requires Legal's approval, after saving and previewing it, either the requester or approver will need to add Legal as an additional approver.</p> <p>Navigate to: eProcurement > Approve Requisitions</p> <p>On the Requisition Approval page that displays, click the plus (+) symbol beside the approver's name shown by the system (not the Start New Path link) and insert ID Y1325393, which will identify the designated workflow approver for Legal.</p>
	<p>The system will then route the requisition and any attached documents to Legal for review. Legal will coordinate having the appropriate attorney review the transaction and any documents attached to the requisition.</p>
	<p>After receiving a response from the attorney reviewing the transaction, Legal's designated approver will either approve or deny the requisition.</p>
	<p>Legal will add any required additional documents to the approved requisition before submitting it to the workflow process.</p>
	<p>If Legal determines additional approvers need to be added, Legal's designated approver will add them to the requisition.</p>
	<p>If the requisition is over \$50,000, the current chartfield workflow rules will route the requisition to the appropriate vice president/DDC for approval.</p>
	<p>A requisition will not be sourced to a purchase order until it obtains all the required approvals.</p>



After the Fact

☞ **How to obtain approval:**

☞ **The General Counsel's Office cannot approve contracts if:**

- ☞ The event has begun or has occurred
- ☞ The contract date has passed

The person who signed the contract without signature authority on behalf of UCF is responsible.



After the Fact

☞ **If you forget to use the Addy Tip:**

☞ **How to
obtain
approval:**

☞ **Send an email to
gcounsel@mail.ucf.edu**

- **Include:**
- **Your name**
- **Department**
- **Contract Title**
- **Requisition #, and;**
- **Attach all the documents**

