

UIUC Checklists Cheat Sheet

#1 – Custom or Other Party Contract (Non-Purchasing)

Used for routing contracts that are not on a University-approved template (for example, another party's contract) to the UIUC AVP Office for review and execution.

#2 – Custom or Other Party Contract (Purchasing)

Used for routing contracts that are not on a University-approved template (for example, another party's contract) to the UIUC Purchasing Division for review and execution.

#3 – Template 5K or more No Changes

Used for routing pre-approved University templates in amounts of \$5,000 or more when no changes have been made to the template. Selected by Requestor/initiator when routing templates to the AVP Office; selected by Buyer when template has been created by Purchasing.

#4 – Template under 5K No Changes (OBFS Signature)

Used for routing pre-approved University templates in amounts of \$4,999 or less that require Comptroller signature to be applied by an OBFS signature delegate when no changes have been made to the template. Used primarily to route contracts to the AVP Office.

#5 – Template under 5K No Changes (Unit Head Signature)

Used for routing pre-approved University templates in amounts of \$4,999 or less that allow Comptroller signature to be applied by a unit head when no changes have been made to the template. Note that this permission has been granted for all unit heads on the Revenue Generating Services Agreement less than \$5,000 and the P&A Services Agreement less than \$5,000. From time to time, the AVP for Business and Finance may also expressly grant this authority to a unit head for a custom pre-approved template.

#6 – Template with Changes

Used for routing University templates in any amount when changes to the template have been requested. Unit heads may not execute agreements less than \$5,000 where changes have been made to the standard, pre-approved template.

#7 – OBFS USE ONLY: University Signing First

Used for routing contracts that must be signed by the University first (usually another party's contract). This checklist should be selected by a Buyer or Coordinator.

#8 – UIS/UIUC Contract Request

Used for routing contract requests to the appropriate OBFS office, so that a Buyer/Coordinator can create the appropriate contract for you.

Checklist #1 – Custom or Other Party Contract (Non-Purchasing)

TASK	DESCRIPTION	ASSIGNMENT	STATUS UPON COMPLETE
Unit Concept Approval (Optional)	Optional Step - Unit Head or Business Manager pre-approval, if desired. If not needed, skip this task and proceed to Assign to OBFS Reviewer task.	If desired, Requestor/initiator assigns to Unit Head or Business Manager by role (i.e. 1_123_unit_head), or by name (i.e. Susan Smith).	Concept Approved
Assign to OBFS Reviewer	An AVP Office coordinator assigns the OBFS Contract Review task to him/herself by name.	Requestor/initiator assigns to the role 1_avp_office_reviewer . This role acts as a queue for contract coordinators in the UIUC AVP Office. One of these users assigns the next task to him/herself, then proceeds with contract review.	OBFS Review
OBFS Contract Review	Contract is reviewed by a coordinator in the AVP Office. Ad hoc routing to Legal Counsel, Risk Management, etc. may occur, as needed.	Contract coordinator assigns to him/herself by name. The coordinator populates Reject To and Notify When Complete fields with the name of the user who assigned the previous task. The coordinator completes all necessary review, including consulting with other administrative offices, negotiating with other party, etc., as needed.	OBFS Review Complete

		When the parties agree that there is a final version ready for signatures, then this step is completed by the coordinator.	
Send Contract to Other Party for Signature	Send the final, approved version of the contract to the other party via email (preferred), then complete this task.	Does not need to be assigned. The Requestor/initiator sends the contract to the other party for signature (via email, mail, etc.), then marks this task complete.	Sent to Other Party for Signature
Import/Scan in Contract with Other Party Signature (No Changes)	If other party signs with no changes, proceed to next step in this checklist. IMPORTANT: If other party requests a change to the contract, then reset the OBFS Contract Review task and assign it to the coordinator who previously completed it.	Does not need to be assigned. When the Requestor/initiator receives the signed contract back from the other party, he/she imports it as a new version, then marks this task complete.	Other Party Signature Received
Unit Head Approval	Unit Head approval of the contract. Required for all contracts, regardless of type or amount.	Requestor/initiator assigns to the Unit Head role for the Chart-Org assigned to the contract, (i.e. 1_123_unit_head).	Unit Head Approved
Dean/Director Approval (For UIS - \$25K and above; For UIC and UIUC - \$50K and above)	Dean or Director approval of the contract. Required for all contracts \$50,000 and above at UIUC.	Requestor/initiator assigns to the Dean/Director role for the Chart-Org assigned to the contract, (i.e. 1_123_dean_director).	Dean/Director Approved
VP/Chancellor/Vice Chancellor (For UIS - \$50K and above; For UIC and UIUC - \$150K and above)	VP/Chancellor/Vice Chancellor approval of the contract. Required for all contracts \$150,000 and above at UIUC.	Requestor/initiator assigns to the appropriate Vice Chancellor by name:	VP/Chancellor/Vice Chancellor Approved

		<ul style="list-style-type: none"> • For units reporting to the Chancellor, assign to Michael DeLorenzo. • For units reporting to the Provost, assign to Vicky Gress. • For units reporting to the OVCR, assign to Melanie Loots. • For units reporting to the OVCSA, assign to Ed Slazinik. 	
Contract Signature (Comptroller by OBFS)	Upon completion of this step, contract status changes to Fully Executed and contract auto-files under the specified Chart and Org code.	<p>Requestor/initiator assigns to the role 1_avp_office_reviewer.</p> <p>This role acts as a queue for contract coordinators in the UIUC AVP Office. The appropriate (or first available) Comptroller delegate applies the executing signature and completes this task.</p>	Fully Executed

Checklist #2 – Custom or Other Party Contract (Purchasing)

TASK	DESCRIPTION	ASSIGNED TO	STATUS UPON COMPLETE
Unit Concept Approval (Optional)	<p><i>Optional Step</i> - Unit Head or Business Manager pre-approval, if desired.</p> <p>If not needed, skip this task and proceed to Assign to OBFS Reviewer task.</p>	If desired, Requestor/initiator assigns to Unit Head or Business Manager by role (i.e. 1_123_unit_head), or by name (i.e. Susan Smith).	Concept Approved
Assign to OBFS Reviewer	The OBFS Reviewer who receives this task assigns the OBFS Contract Review task to the appropriate buyer.	<p>Requestor/initiator assigns to the role 1_purchasing_reviewer.</p> <p>This role acts as a queue for supervisors in the UIUC Purchasing Office. One of these users assigns the next task to a buyer, who then proceeds with contract review.</p>	OBFS Review
OBFS Contract Review	Contract is reviewed by an OBFS Purchasing buyer. Ad hoc routing to Legal Counsel, Risk Management, etc. may occur, as needed.	<p>Purchasing supervisor assigns to the appropriate buyer by name (i.e., John Smith).</p> <p>The supervisor populates Reject To and Notify When Complete fields with the name of the user who assigned the previous task.</p> <p>The buyer completes all necessary review, including consulting with other administrative offices, negotiating with other party, etc., as needed.</p> <p>When the other party returns a signed copy of the contract and there is a final version ready</p>	OBFS Review Complete

		for University Comptroller signature, then the buyer completes this step.	
Send Final Contract to Unit for Approval	<p>After the contract has been drafted, the buyer/coordinator sends it to the unit contact for approval before sending it to the other party for signature.</p> <p><i>Optional Step –</i> Requestor/initiator or unit technical representative approval, if desired.</p> <p>If not needed, skip this task and proceed to Send Contract to Other Party for Signature task.</p>	<p>Buyer assigns to the Requestor/initiator by name (i.e. Susan Smith).</p> <p>Requestor/initiator completes all necessary review, including consulting with other unit administrative offices, unit technical representative, etc., as needed.</p> <p>When the unit returns approval of the contract and there is a final version ready for other party signature, then the buyer completes this step.</p>	Does not change status
Send Contract to Other Party for Signature	Send the final, approved version of the contract to the other party via email (preferred), then complete this task.	<p>Does not need to be assigned.</p> <p>The buyer sends the contract to the other party for signature (via email, mail, etc.), then marks this task complete.</p>	Sent to Other Party for Signature
Import/Scan in Contract with Other Party Signature (No Changes)	If other party signs with no changes, proceed to next step in this Checklist.	<p>Does not need to be assigned.</p> <p>When the buyer receives the signed contract back from the other party, he/she imports as a new version, then marks this task complete.</p>	Other Party Signature Received
Unit Head Approval	Unit Head approval of the contract. Required for all	Buyer assigns to the Unit Head role for the Chart-Org assigned to the contract, (i.e. 1_123_unit_head).	Unit Head Approved

	contracts, regardless of type or amount.		
Dean/Director Approval (For UIS - \$25K and above; For UIC and UIUC - \$50K and above)	Dean or Director approval of the contract. Required for all contracts \$50,000 and above at UIUC.	Buyer assigns to the Dean/Director role for the Chart-Org assigned to the contract, (i.e. 1_123_dean_director).	Dean/Director Approved
VP/Chancellor/Vice Chancellor Approval (For UIS - \$50K and above; For UIC and UIUC - \$150K and above)	VP/Chancellor/Vice Chancellor approval of the contract. Required for all contracts \$150,000 and above at UIUC.	Buyer assigns to the appropriate Vice Chancellor by name: <ul style="list-style-type: none"> For units reporting to the Chancellor, assign to Michael DeLorenzo. For units reporting to the Provost, assign to Vicky Gress. For units reporting to the OVCR, assign to Melanie Loots. For units reporting to the OVCSA, assign to Ed Slazinik. 	VP/Chancellor/Vice Chancellor Approved
Chief Legal Counsel Approval (\$250K and above – payable only)	Chief Legal Counsel (or authorized delegate) approval of the contract. Required only for payable contracts \$250,000 and above.	Buyer assigns to the primary University Counsel delegate by name (i.e. James Doe).	Chief Legal Counsel Approved
President Approval (\$250K and above – payable only)	University President (or authorized delegate) approval of the contract. Required only for	Buyer assigns to the primary President delegate by name (i.e. Steve Smith).	President Approved

	payable contracts \$250,000 and above.		
Contract Signature (Comptroller by OBFS)	Upon completion of this step, contract status changes to Fully Executed and contract auto-files under the specified Chart and Org code.	Buyer assigns to the primary Comptroller signatory by name (i.e. Jane Doe).	Fully Executed
UCRO Contract Filing (payable contracts and payable amendments only)	Sends contract to the University Contract Records Office for state filing. Required only for payable contracts and amendments to payable contracts.	Task is configured to automatically route to the University Contract Records Office upon completion of the Contract Signature task.	Status does not change.

Checklist #3 – Template 5K or more No Changes

TASK	DESCRIPTION	ASSIGNMENT	STATUS UPON COMPLETE
Unit Concept Approval (Optional)	<p><i>Optional Step</i> - Unit Head or Business Manager pre-approval, if desired.</p> <p>If not needed, skip this task and proceed to Assign to OBFS Reviewer task.</p>	If desired, Requestor/initiator assigns to Unit Head or Business Manager by role (i.e. 1_123_unit_head), or by name (i.e. Susan Smith).	Concept Approved
Send Contract to Other Party for Signature	Send the final, approved version of the contract to the other party via email (preferred), then complete this task.	<p>Does not need to be assigned.</p> <p>FOR AVP OFFICE CONTRACTS: Requestor/initiator sends the contract to the other party for signature (via email, mail, etc.), then marks this task complete.</p> <p>FOR PURCHASING CONTRACTS: Buyer sends the contract to the other party for signature (via email, mail, etc.), then marks this task complete.</p>	Sent to Other Party for Signature
Import/Scan in Contract with Other Party Signature (No Changes)	If other party signs with no changes, proceed to next step in this checklist. IMPORTANT: If other party requests a change to the contract, then add Template with Changes Checklist (move to Checklist #6 in this cheat sheet).	<p>Does not need to be assigned.</p> <p>FOR AVP OFFICE CONTRACTS: When the Requestor/initiator receives the signed contract back from the other party, he/she imports it as a new version, then marks this task complete.</p> <p>FOR PURCHASING CONTRACTS: When the buyer receives the signed contract</p>	Other Party Signature Received

		back from the other party, he/she imports it as a new version, then marks this task complete.	
Unit Head Approval	Unit Head approval of the contract. Required for all contracts, regardless of type or amount.	<p>FOR AVP OFFICE CONTRACTS: Requestor/initiator assigns to the Unit Head by name, or to the Unit Head role for the Chart-Org assigned to the contract (i.e. 1_123_unit_head).</p> <p>FOR PURCHASING CONTRACTS: Buyer assigns to the Unit Head role for the Chart-Org assigned to the contract, (i.e. 1_123_unit_head).</p>	Unit Head Approved
Dean/Director Approval (For UIS - \$25K and above; For UIC and UIUC - \$50K and above)	Dean or Director approval of the contract. Required for all contracts \$50,000 and above at UIUC.	<p>FOR AVP OFFICE CONTRACTS: Requestor/initiator assigns to the Dean/Director by name, or to the Dean/Director role for the Chart-Org assigned to the contract (i.e. 1_123_dean_director)</p> <p>FOR PURCHASING CONTRACTS: Buyer assigns to the Dean/Director role for the Chart-Org assigned to the contract, (i.e. 1_123_dean_director).</p>	Dean/Director Approved
VP/Chancellor/Vice Chancellor (For UIS - \$50K and above; For UIC and UIUC - \$150K and above)	VP/Chancellor/Vice Chancellor approval of the contract. Required for all contracts \$150,000 and above at UIUC.	<p>FOR AVP OFFICE CONTRACTS: Requestor/initiator assigns to the appropriate Vice Chancellor by name (see list below).</p> <p>FOR PURCHASING CONTRACTS: Buyer assigns to the appropriate Vice Chancellor by name:</p>	VP/Chancellor/Vice Chancellor Approved

		<ul style="list-style-type: none"> For units reporting to the Chancellor, assign to Michael DeLorenzo. For units reporting to the Provost, assign to Vicky Gress. For units reporting to the OVCR, assign to Melanie Loots. For units reporting to the OVCSA, assign to Ed Slazinik. 	
Chief Legal Counsel Approval (\$250K and above – payable contracts)	Chief Legal Counsel (or authorized delegate) approval of the contract. Required only for payable contracts \$250,000 and above.	<p>Buyer/Coordinator assigns as described below.</p> <p>FOR AVP OFFICE CONTRACTS: Requestor skips this task and assigns the Contract Signature task. If Chief Legal and President approvals are required, the delegate who applies the Comptroller signature assigns and/or completes these approval steps first.</p> <p>FOR PURCHASING CONTRACTS: Assigns to the primary University Counsel delegate by name (i.e. James Doe).</p>	Chief Legal Counsel Approved
President Approval (\$250K and above – payable contracts)	University President (or authorized delegate) approval of the contract. Required only for payable contracts \$250,000 and above.	<p>Buyer/Coordinator assigns as described below.</p> <p>FOR AVP OFFICE CONTRACTS: Requestor skips this task and assigns the Contract Signature task. If Chief Legal and President approvals are required, the delegate who applies the Comptroller signature assigns and/or completes these approval steps first.</p>	President Approved

		FOR PURCHASING CONTRACTS: Assigns to the primary President delegate by name (i.e. Steve Smith).	
Contract Signature (Comptroller by OBFS)	Upon completion of this step, contract status changes to Fully Executed and contract auto-files under the specified Chart and Org code.	FOR AVP OFFICE CONTRACTS: Requestor/initiator assigns this task to the role 1_avp_office_reviewer . This role acts as a queue for contract coordinators in the UIUC AVP Office. The appropriate (or first available) Comptroller delegate applies the executing signature and completes this task. FOR PURCHASING CONTRACTS: Assigns to the primary Comptroller signatory by name (i.e. Jane Doe).	Fully Executed
UCRO Contract Filing (payable contracts and payable amendments)	Sends contract to the University Contract Records Office for state filing. Required only for payable contracts and amendments to payable contracts.	Task is configured to automatically route to the University Contract Records Office upon completion of the Contract Signature task.	Status does not change

Checklist #4 – Template under 5K No Changes (OBFS Signature)

TASK	DESCRIPTION	ASSIGNMENT	STATUS UPON COMPLETE
Unit Concept Approval (Optional)	<p><i>Optional Step</i> - Unit Head or Business Manager pre-approval, if desired.</p> <p>If not needed, skip this task and proceed to Send Contract to Other Party for Signature task.</p>	If desired, Requestor/initiator assigns to Unit Head or Business Manager by role (i.e. 1_123_unit_head), or by name (i.e. Susan Smith).	Concept Approved
Send Contract to Other Party for Signature	Send the final, approved version of the contract to the other party via email (preferred), then complete this task.	<p>Does not need to be assigned.</p> <p>Requestor/initiator sends the contract to the other party for signature (via email, mail, etc.), then marks this task complete.</p>	Sent to Other Party for Signature
Import/Scan in Contract with Other Party Signature (No Changes)	If other party signs with no changes, proceed to next step in this checklist. IMPORTANT: If other party requests a change to the contract, add Template with Changes Checklist (move to Checklist #6 in this cheat sheet).	<p>Does not need to be assigned.</p> <p>When the Requestor/initiator receives the signed contract back from the other party, he/she imports as a new version, then marks this task complete.</p>	Other Party Signature Received
Unit Head Approval	Unit Head approval of the contract. Required for all contracts, regardless of type or amount.	Requestor/initiator assigns to the Unit Head by name or to the Unit Head role for the Chart-Org assigned to the contract, (i.e. 1_123_unit_head).	Unit Head Approved
Contract Signature (Comptroller by OBFS)	Upon completion of this step, contract status changes to Fully	Requestor/initiator assigns this task to the role 1_avp_office_reviewer.	Fully Executed

	Executed and contract auto-files under the specified Chart and Org code.	This role acts as a queue for contract coordinators in the UIUC AVP Office. The appropriate (or first available) Comptroller delegate applies the executing signature and completes this task.	
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Checklist #5 – Template under 5K No Changes (Unit Head Signature)

TASK	DESCRIPTION	ASSIGNMENT	STATUS UPON COMPLETE
Unit Concept Approval (Optional)	<p><i>Optional Step</i> - Unit Head or Business Manager pre-approval, if desired.</p> <p>If not needed, skip this task and proceed to Send Contract to Other Party for Signature task.</p>	If desired, Requestor/initiator assigns to Unit Head or Business Manager by role (i.e. 1_123_unit_head), or by name (i.e. Susan Smith).	Concept Approved
Send Contract to Other Party for Signature	Send the final, approved version of the contract to the other party via email (preferred), then complete this task.	<p>Does not need to be assigned.</p> <p>Requestor/initiator sends the contract to the other party for signature (via email, mail, etc.), then marks this task complete.</p>	Sent to Other Party for Signature
Import/Scan in Contract with Other Party Signature (No Changes)	If other party signs with no changes, proceed to next step in this checklist. IMPORTANT: If other party requests a change to the contract, then add Template with Changes Checklist (move to Checklist #6 in this cheat sheet).	<p>Does not need to be assigned.</p> <p>When the Requestor/initiator receives the signed contract back from the other party, he/she imports as a new version, then marks this task complete.</p>	Other Party Signature Received
Contract Signature (Comptroller by Unit Head)	This checklist assumes the other party signed first, so the Unit Head's signature results in fully executed contract (NOTE: Status does not change until final checklist task is completed).	Requestor/initiator assigns to the Unit Head role for the Chart-Org assigned to the contract, (i.e. 1_123_unit_head).	Signed by University

Import/Scan in Fully Executed Contract	<p>IMPORTANT: First, import the fully executed contract image as a new version. Upon completion of this step, contract status changes to Fully Executed and contract auto-files under the specified Chart and Org code.</p>	<p>Does not need to be assigned.</p> <p>When the Requestor/initiator receives the signed contract back from the Unit Head, he/she imports as a new version, then marks this task complete.</p>	<p>Fully Executed</p>
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Checklist #6 – Template with Changes

TASK	DESCRIPTION	ASSIGNMENT	STATUS UPON COMPLETE
Unit Concept Approval (Optional)	<p><i>Optional Step</i> - Unit Head or Business Manager pre-approval, if desired.</p> <p>If not needed, skip this task and proceed to Assign to OBFS Reviewer task.</p>	If desired, Requestor/initiator assigns to Unit Head or Business Manager by role (i.e. 1_123_unit_head), or by name (i.e. Susan Smith).	Concept Approved
Send Contract to Other Party for Signature	Send the final, approved version of the contract to the other party via email (preferred), then complete this task. It is assumed that the contract started on a different checklist (e.g. Template No Changes). This completed step displays on the previous checklist.	<p>Does not need to be assigned.</p> <p>FOR AVP OFFICE CONTRACTS: The Requestor/initiator sends the contract to the other party for signature (via email, mail, etc.), then marks this task complete.</p> <p>FOR PURCHASING CONTRACTS: Buyer sends the contract to the other party for signature (via email, mail, etc.), then marks this task complete.</p>	OBFS Review
Import/Scan in Contract with Other Party Notes and/or Requested Changes	This checklist assumes that changes have been requested by the other party.	<p>Does not need to be assigned.</p> <p>FOR AVP OFFICE CONTRACTS: When the Requestor/initiator receives requested changes from the other party, he/she imports it as a new version (if they provided a redline contract document), and/or imports any relevant email or other document</p>	Other Party Changes Requested

		<p>detailing the request, then marks this task complete.</p> <p>FOR PURCHASING CONTRACTS: When the buyer receives requested changes from the other party, he/she imports it as a new version (if they provided a redline contract document), and/or imports any relevant email or other document detailing the request, then marks this task complete.</p>	
Assign to OBFS Reviewer	The OBFS Reviewer who receives this task assigns the OBFS Contract Review task to the appropriate buyer or coordinator.	<p>FOR AVP OFFICE CONTRACTS: Requestor/initiator assigns this task to the role 1_avp_office_reviewer.</p> <p>This role acts as a queue for contract coordinators in the UIUC AVP Office. One of these users assigns the next task to him/herself, then proceeds with contract review.</p> <p>FOR PURCHASING CONTRACTS: Requestor/initiator assigns to the role 1_purchasing_reviewer.</p> <p>This role acts as a queue for supervisors in the UIUC Purchasing Office. One of these users assigns the next task to a buyer, who proceeds with contract review.</p>	OBFS Review
OBFS Contract Review	Contract is reviewed by an OBFS contract coordinator. Ad hoc routing to Legal Counsel, Risk	<p>FOR AVP OFFICE CONTRACTS: Contract coordinator assigns to him/herself by name.</p>	OBFS Review Complete

	<p>Management, etc. may occur, as needed.</p>	<p>Coordinator completes all necessary review, including consulting with other administrative offices, negotiating with other party, etc., as needed.</p> <p>When the parties agree that there is a final version ready for signatures, this step is completed by the coordinator.</p> <p>FOR PURCHASING CONTRACTS: Purchasing supervisor assigns to the appropriate buyer by name (i.e., John Smith).</p> <p>The supervisor populates Reject To and Notify When Complete fields with the name of the user who assigned the previous task.</p> <p>Buyer completes all necessary review, including consulting with other administrative offices, negotiating with other party, etc., as needed.</p> <p>When the other party returns a signed copy of the contract and there is a final version ready for University Comptroller signature, buyer completes this step.</p>	
Re-Send Contract to Other Party for Signature	<p>Send the final, approved version of the contract to the other party via email (preferred), then complete this task.</p>	<p>Does not need to be assigned.</p> <p>FOR AVP OFFICE CONTRACTS: Requestor/initiator sends the contract to the other party for signature (via email, mail, etc.), then marks this task complete.</p>	<p>Sent to Other Party for Signature</p>

		FOR PURCHASING CONTRACTS: Buyer sends the contract to the other party for signature (via email, mail, etc.), then marks this task complete.	
Import/Scan in Contract with Other Party Signature (No Changes)	If other party signs with no changes, proceed to next step in this checklist. IMPORTANT: If other party requests a change to the contract, then reset the OBFS Contract Review task and assign it to the coordinator who previously completed it.	Does not need to be assigned. FOR AVP OFFICE CONTRACTS: When the Requestor/initiator receives the signed contract back from the other party, he/she imports it as a new version, then marks this task complete. FOR PURCHASING CONTRACTS: When the buyer receives the signed contract back from the other party, he/she imports it as a new version, then marks this task complete.	Other Party Signature Received
Unit Head Approval	Unit Head approval of the contract. Required for all contracts, regardless of type or amount.	FOR AVP OFFICE CONTRACTS: Requestor/initiator assigns to the Unit Head by name, or to the Unit Head role for the Chart-Org assigned to the contract (i.e. 1_123_unit_head). FOR PURCHASING CONTRACTS: Buyer assigns to the Unit Head role for the Chart-Org assigned to the contract, (i.e. 1_123_unit_head).	Unit Head Approved
Dean/Director Approval (For UIS - \$25K and above; For UIC and UIUC - \$50K and above)	Dean or Director approval of the contract. Required for all contracts \$50,000 and above at UIUC.	FOR AVP OFFICE CONTRACTS: Requestor/initiator assigns to the Dean/Director by name, or to the	Dean/Director Approved

		<p>Dean/Director role for the Chart-Org assigned to the contract (i.e. 1_123_dean_director).</p> <p>FOR PURCHASING CONTRACTS: Buyer assigns to the Dean/Director role for the Chart-Org assigned to the contract, (i.e. 1_123_dean_director).</p>	
VP/Chancellor/Vice Chancellor (For UIS - \$50K and above; For UIC and UIUC - \$150K and above)	<p>VP/Chancellor/Vice Chancellor approval of the contract.</p> <p>Required for all contracts \$150,000 and above at UIUC.</p>	<p>FOR AVP OFFICE CONTRACTS: Requestor/initiator assigns to the appropriate Vice Chancellor by name (see list below).</p> <p>FOR PURCHASING CONTRACTS: Buyer assigns to the appropriate Vice Chancellor by name:</p> <ul style="list-style-type: none"> • For units reporting to the Chancellor, assign to Michael DeLorenzo. • For units reporting to the Provost, assign to Vicky Gress. • For units reporting to the OVCR, assign to Melanie Loots. • For units reporting to the OVCSA, assign to Ed Slazinik. 	VP/Chancellor/Vice Chancellor Approved
Chief Legal Counsel Approval (\$250K and above – payable only)	<p>Chief Legal Counsel (or authorized delegate) approval of the contract. Required only for payable contracts \$250,000 and above.</p>	<p>Buyer/Coordinator assigns as described below.</p> <p>FOR AVP OFFICE CONTRACTS: Requestor skips this task and assigns the Contract Signature task. If Chief Legal and President approvals are required, the delegate</p>	

		<p>who applies the Comptroller signature assigns and/or completes these approval steps first.</p> <p>FOR PURCHASING CONTRACTS: Assigns to the primary University Counsel delegate by name (i.e. James Doe).</p>	
President Approval (\$250K and above – payable only)	University President (or authorized delegate) approval of the contract. Required only for payable contracts \$250,000 and above.	<p>Buyer/Coordinator assigns as described below.</p> <p>FOR AVP OFFICE CONTRACTS: Requestor skips this task and assigns the Contract Signature task. If Chief Legal and President approvals are required, the delegate who applies the Comptroller signature assigns and/or completes these approval steps first.</p> <p>FOR PURCHASING CONTRACTS: Assigns to the primary President delegate by name (i.e. Steve Smith).</p>	
Contract Signature (Comptroller by OBFS)	Upon completion of this step, contract status changes to Fully Executed and contract auto-files under the specified Chart and Org code.	<p>FOR AVP OFFICE CONTRACTS: Requestor/initiator assigns to the role 1_avp_office_reviewer.</p> <p>This role acts as a queue for contract coordinators in the UIUC AVP Office. The appropriate (or first available) Comptroller delegate applies the executing signature and completes this task.</p> <p>FOR PURCHASING CONTRACTS: Buyer assigns to the primary Comptroller signatory by name (i.e. Jane Doe).</p>	Fully Executed

UCRO Contract Filing (payable contracts and payable amendments only)	Sends contract to the University Contract Records Office for state filing. Required only for payable contracts and amendments to payable contracts.	Task is configured to automatically route to the University Contract Records Office upon completion of the Contract Signature task.	Status does not change.
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Checklist #7 – OBFS USE ONLY: University Signing First

TASK	DESCRIPTION	ASSIGNMENT	STATUS UPON COMPLETE
Assign to OBFS Reviewer	The OBFS Reviewer who receives this task assigns the OBFS Contract Review task to the appropriate Buyer or Coordinator.	<p>Requestor/initiator assigns as described below.</p> <p>FOR AVP OFFICE CONTRACTS: Assigns to the role 1_avp_office_reviewer.</p> <p>This role acts as a queue for contract coordinators in the UIUC AVP Office. One of these users assigns the next task to him/herself, then proceeds with contract review.</p> <p>FOR PURCHASING CONTRACTS: Assigns to the role 1_purchasing_reviewer.</p> <p>This role acts as a queue for supervisors in the UIUC Purchasing Office. One of these users assigns the next task to a buyer, who proceeds with contract review.</p>	OBFS Review
OBFS Contract Review	Contract is reviewed by an OBFS Buyer or Coordinator. Ad hoc routing to Legal Counsel, Risk Management, etc. may occur, as needed.	<p>FOR AVP OFFICE CONTRACTS: Contract coordinator assigns to him/herself by name.</p> <p>The coordinator populates Reject To and Notify When Complete fields with the name of the user who assigned the previous task.</p> <p>The coordinator completes all necessary review, including consulting with other</p>	OBFS Review Complete

		<p>administrative offices, negotiating with other party, etc., as needed.</p> <p>When the parties agree that there is a final version ready for signatures, this step is completed by the coordinator.</p> <p>FOR PURCHASING CONTRACTS: Purchasing supervisor assigns to the appropriate buyer by name (i.e., John Smith).</p> <p>The supervisor populates Reject To and Notify When Complete fields with the name of the user who assigned the previous task.</p> <p>The buyer completes all necessary review, including consulting with other administrative offices, negotiating with other party, etc., as needed.</p> <p>When the other party returns a signed copy of the contract and there is a final version ready for University Comptroller signature, this step is completed by the buyer.</p>	
Unit Head Approval	Unit Head approval of the contract. Required for all contracts, regardless of type or amount.	<p>FOR AVP OFFICE CONTRACTS: Requestor/initiator assigns to the Unit Head by name, or to the Unit Head role for the Chart-Org assigned to the contract (i.e. 1_123_unit_head)..</p> <p>FOR PURCHASING CONTRACTS: Buyer assigns to the Unit Head role for the</p>	Unit Head Approved

		Chart-Org assigned to the contract, (i.e. 1_123_unit_head).	
Dean/Director Approval (For UIS - \$25K and above; For UIC and UIUC - \$50K and above)	Dean or Director approval of the contract. Required for all contracts \$50,000 and above at UIUC.	<p>FOR AVP OFFICE CONTRACTS: Requestor/initiator assigns to the Dean/Director by name, or to the Dean/Director role for the Chart-Org assigned to the contract (i.e. 1_123_dean_director).</p> <p>FOR PURCHASING CONTRACTS: Buyer assigns to the Dean/Director role for the Chart-Org assigned to the contract, (i.e. 1_123_dean_director).</p>	Dean/Director Approved
VP/Chancellor/Vice Chancellor (For UIS - \$50K and above; For UIC and UIUC - \$150K and above)	VP/Chancellor/Vice Chancellor approval of the contract. Required for all contracts \$150,000 and above at UIUC.	<p>FOR AVP OFFICE CONTRACTS: Requestor/initiator assigns to the appropriate Vice Chancellor by name (see list below).</p> <p>FOR PURCHASING CONTRACTS: Buyer assigns to the appropriate Vice Chancellor by name:</p> <ul style="list-style-type: none"> • For units reporting to the Chancellor, assign to Michael DeLorenzo. • For units reporting to the Provost, assign to Vicky Gress. • For units reporting to the OVCR, assign to Melanie Loots. • For units reporting to the OVCSA, assign to Ed Slazinik. 	VP/Chancellor/Vice Chancellor Approved

Chief Legal Counsel Approval (\$250K and above – payable only)	Chief Legal Counsel (or authorized delegate) approval of the contract. Required only for payable contracts \$250,000 and above.	<p>Buyer/Coordinator assigns as described below.</p> <p>FOR AVP OFFICE CONTRACTS: Requestor skips this task and assigns the Contract Signature task. If Chief Legal and President approvals are required, the delegate who applies the Comptroller signature assigns and/or completes these approval steps first.</p> <p>FOR PURCHASING CONTRACTS: Assigns to the primary University Counsel delegate by name (i.e. James Doe).</p>	Chief Legal Counsel Approved
President Approval (\$250K and above – payable only)	University President (or authorized delegate) approval of the contract. Required only for payable contracts \$250,000 and above.	<p>Buyer/Coordinator assigns as described below.</p> <p>FOR AVP OFFICE CONTRACTS: Requestor skips this task and assigns the Contract Signature task. If Chief Legal and President approvals are required, the delegate who applies the Comptroller signature assigns and/or completes these approval steps first.</p> <p>FOR PURCHASING CONTRACTS: Assigns to the primary President delegate by name (i.e. Steve Smith).</p>	President Approved
Contract Signature (Comptroller by OBFS)	Upon completion of this step, contract status will change to Signed for University. The contract is not Fully Executed until both parties have signed.	<p>FOR AVP OFFICE CONTRACTS: Requestor/initiator assigns to the role 1_avp_office_reviewer.</p> <p>This role acts as a queue for contract coordinators in the UIUC AVP Office. The appropriate (or first available) Comptroller</p>	Signed for University

		<p>delegate applies the University signature and completes this task.</p> <p>FOR PURCHASING CONTRACTS: Assigns to the primary Comptroller signatory by name (i.e. Jane Doe).</p>	
Send Contract to Other Party for Execution	<p>This checklist assumes University has signed first, so other party's signature results in fully executed contract (NOTE: Status does not change until final checklist task is completed).</p>	<p>Does not need to be assigned.</p> <p>FOR AVP OFFICE CONTRACTS: Requestor/initiator sends the contract to the other party for signature (via email, mail, etc.), then marks this task complete.</p> <p>FOR PURCHASING CONTRACTS: Buyer sends the contract to the other party for signature (via email, mail, etc.), then marks this task complete.</p>	Sent to Other Party for Execution
Import/Scan in Contract with Other Party Signature	<p>If other party signs with no changes, proceed to next step in this checklist. IMPORTANT: If other party requests a change to the contract, then reset first step and reassign to the coordinator who originally completed it.</p>	<p>Does not need to be assigned.</p> <p>FOR AVP OFFICE CONTRACTS: When the Requestor/initiator receives the signed contract back from the other party, he/she imports it as a new version, then marks this task complete.</p> <p>FOR PURCHASING CONTRACTS: When the buyer receives the signed contract back from the other party, he/she imports it as a new version, then marks this task complete.</p>	Other Party Signature Received

Manually Enter Fully Executed Date (if different from date of last signature on contract image)	Fully executed field auto-populates with current date when final checklist task is completed. Buyer/Coordinator enters date of last signature manually before completing this task. Make sure date matches actual contract image.	<p>FOR AVP OFFICE CONTRACTS: Requestor/initiator assigns by name to the coordinator who previously completed the Contract Signature (Comptroller by OBFS) task above.</p> <p>FOR PURCHASING CONTRACTS: Does not need to be assigned.</p> <p>After the buyer imports the fully executed version of the contract, he/she manually enters the date of the last signature on the contract image, then marks this task complete.</p>	Execution Date Updated
Mark Contract Fully Executed	Upon completion of this step, contract status changes to Fully Executed and contract auto-files under the specified Chart and Org code.	<p>Does not need to be assigned.</p> <p>Buyer/Coordinator completes this task when the contract is ready to be marked as fully executed.</p>	Fully Executed
UCRO Contract Filing (payable contracts and payable amendments only)	Sends contract to the University Contract Records Office for state filing. Required only for payable contracts and amendments to payable contracts.	Task is configured to automatically route to the University Contract Records Office upon completion of the Mark Contract Fully Executed task.	Status does not change

Checklist #8 – UIS/UIUC Contract Request

TASK	DESCRIPTION	ASSIGNED TO	STATUS UPON COMPLETE
Unit Concept Approval (Optional)	<p><i>Optional Step</i> - Unit Head or Business Manager pre-approval, if desired.</p> <p>If not needed, skip this task and proceed to Assign to OBFS Reviewer task.</p>	If desired, Requestor/initiator assigns to Unit Head or Business Manager by role (i.e. 1_123_unit_head), or by name (i.e. Susan Smith).	Concept Approved
Assign to OBFS Reviewer	The OBFS Reviewer who receives this task assigns the OBFS Contract Review task to the appropriate buyer or coordinator.	<p>Requestor/initiator assigns to the role 1_purchasing_reviewer or 1_avp_office_reviewer.</p> <p>This role acts as a queue for supervisors in the UIUC Purchasing Office, or coordinators in the UIUC AVP Office. One of these users assigns the next task to a buyer/coordinator, who proceeds with contract review.</p>	OBFS Review
OBFS Contract Review	Contract is created by an OBFS Purchasing buyer, or coordinator in the AVP Office.	<p>Purchasing supervisor or the AVP Office coordinator assigns to the appropriate buyer/coordinator by name (i.e., John Smith).</p> <p>The buyer/coordinator uses the information provided in the request to create a contract, which the Requestor/initiator can access via Related Documents in the Contract Request.</p>	OBFS Review Complete