CONTRACT PROCESSING
CONTRACT OFFICE FORM

CAUTION: THE MT SOURCE REQUESTER ENTERING THE REQUISITION MUST FIRST BE “IN” THE DEPARTMENT THAT IS REQUESTING THE FUNDS. USE THE PROFILE LINK TO CHANGE DEPARTMENT. (see page 14)

From the MT Source HOME PAGE . . .

1 - In the Showcased Services section
Locate and click the link - Contract Office Form
Complete the **Contract Office Form**

**Contract Office Form**

**Supplier/Vendor Instructions**

When Supplier/Vendor is not setup in MTSsource, select **Supplier Unknown** as the vendor. Obtain and provide a W-9 form from the Vendor and attach as an 'Internal Attachment' so Procurement can setup the Supplier in Banner.

**Distribution**

The system will distribute purchase orders using the method(s) indicated below:

- Email (Plain Text)
- Email (HTML Body)
- Manual

**Instructions**

On **Contract Office** website, select the appropriate contract form. Once completely filled in, scan the Agreement and attach it as an Internal Attachment. For Grant Agreements, Software License Agreements, Athletic Agreements, or other Vendor-generated Agreements, scan the Agreement and attach it as an Internal Attachment. For any questions regarding contract form selection, please contact the Contract Office, Phone 615-898-2088.

**Contract Signature Instructions**

If Contract has NOT been signed by Vendor/Contractor, please indicate in the text space below if the Contract should be returned to the Submitting Department to obtain the Contractor's signature OR the Contract should be forwarded directly to Contractor for signature.

**General Info**

- **Please provide Contractor's Name and Address**
  - Elevators Everywhere, Inc.
  - 1440 ABC Street  Suite A20
  - Nashville, TN 37217-2981

- **Service Description**
  - Contract for elevator parts, service, preventative maintenance, and certifications per specifications and schedule.

- **Quantity**
  - 1

- **Unit of Measure**
  - YR - Year

- **Estimated Price**
  - 8000

- **Capital Expense**

- **Contract Start Date**
  - 11/1/2011

- **Contract End Date**
  - 10/30/2016

**Enter Supplier**, if active in MT Source, otherwise use ‘Supplier Unknown’ and assist in obtaining W-9

**Enter Cost for the current period (i.e. Fiscal Year)**

For Contract/Document Approval and signature only, enter price as zero.

**Enter dates to cover the entire contract period.**

Continue . . . .

**A response is required in each section.**
No Justification Contracts

No competitive bid process and no justification is required for contracts under $5,000 OR for Dual Service Agreements, agreements with another state agency/political subdivision of the state/other public entity in Tennessee/any entity of the federal government. If the contract falls within one of these categories, please indicate N/A for the following Justification questions. Please note that an entry must be inserted in each field to complete this requisition form.

Justification for Non-Competitive Services

**Instructions:** The Senior Vice President must approve Non-Competitive Purchases and Contracts of $5,000 and greater. This approval cannot be delegated. Contracts exceeding $250,000 must be routed through the President’s Office and through the Chancellor of the Tennessee Board of Regents’ Office for approval, and to the Legislative Fiscal Review Committee for comment. A minimum of ninety (90) days will be required to process service contracts exceeding $250,000. Contracts/procurements are required to go to the Fiscal Review Committee whenever the contract/procurement meets all of the following requirements: (1) The contract is Non-Competitive; (2) The contract is over $250,000 in total (inclusive of renewals); and (3) When the total contract term (inclusive of renewal options) is over a period of one (1) year.

#1. Description of service to be acquired:

Contract for elevator parts, service, preventative maintenance, inspections and certifications per specifications and schedule.

#2. Explanation of the need or requirement placed on the procuring institution to acquire service:

Building elevators need routine preventative maintenance, quarterly inspections and annual certifications per state and federal guidelines.

#3. Name and address of the proposed contractor’s principal owner(s):

Elevators Everywhere, Inc
1440 ABC Street Suite A20
Nashville, TN 37217-2981

#4(a). Evidence that the proposed contractor has experience in providing the service:

Supplier has been performing this service in the local area for the past twenty years. References were provided, checked and verified.

#4(b). The length of time the contractor has provided the same or similar service:

Twenty (20) years

#5(a). Was the service ever bought by the Institution in the past?

Yes

#5(b). If so, what method was used to acquire the service and who was the contractor?

Provided by Contract with supplier, Elevator Express, who is no longer in business.

Continue . . .
Complete all sections.

#6(a). Describe your efforts to use institutional employees/resources to perform the services:

Repair, inspections, certifications, and PM must be performed by trained and certified technicians. The University does not employ anyone trained and certified.

89 characters remaining

#6(b). Describe your efforts to identify competitive procurement alternatives:

No other vendor is certified in our area.

209 characters remaining

#7 TBR Policy 4:02:10:00, Section XIV(B) for factors to justify a non-competitive service contract:

TBR Policy 4:02:10:00, Section XIV(B):

This service must be done by trained and certified technicians. To maintain compliance to State, Federal, and OSHA guidelines, this supplier is selected since it is the sole provider within the 70 mile radius requirement.

28 characters remaining

Contract Monitor Requirements

Please specify in the below box the Contract Monitor in your department responsible for ensuring receipt of goods/services contracted for under this agreement. Provide the frequency of monitoring (monthly, quarterly, semi-annually, annually, or as applicable).

Contract Monitor Information

Mr. I. Will Follow
Monthly Monitoring
13 characters remaining

Provide name and frequency.

Sole Source Letter from Vendor

Sole Source Letter F... (21k)

add attachment...

2 - Once your Contract Office Form is complete, return to the top right

Select Add and go to Cart then Click Go.

Since it is not necessary to duplicate the information already entered on the Contract Order Form, if the requisition has more than one line item, the Non-catalog form should be used for the additional items.
Additional Documents may be required to process the Requisition as a Contract. Blank forms are located on the MTSU CONTRACT OFFICE web site: [http://www.mtsu.edu/contract](http://www.mtsu.edu/contract).

The Contract Office Form replaces several of these paper forms: Document Approval Form, Routing Form, Justification forms, etc.

<table>
<thead>
<tr>
<th>Form</th>
<th>Word Document</th>
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</thead>
<tbody>
<tr>
<td>Contract for Deposit and Investment of Funds</td>
<td></td>
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<tr>
<td>Contract Monitoring Plan</td>
<td></td>
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<tr>
<td>Clinical Affiliation Agreement (Facilities other than MCA)</td>
<td></td>
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<tr>
<td>&quot;Document Approval Form&quot; (New as of 6/19/2011)</td>
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<tr>
<td>Dual Service Agreement</td>
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<tr>
<td>Entertainment Agreement</td>
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<tr>
<td>Hardware/Software Agreement</td>
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<tr>
<td>Intellectual Property/Research Agreement</td>
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<tr>
<td>&quot;Justification for Non-Competitive Personal or Professional Service Contract Between $5,000 and $249,999&quot; (Previous Threshold was $500)</td>
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<tr>
<td>Justification for Non-Competitive Personal or Professional Service Contract $250,000 and Greater</td>
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<tr>
<td>Minority/Ethnicity Form</td>
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<tr>
<td>&quot;MTSU as a Service Provider&quot; (New as of 8/26/2011)</td>
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<tr>
<td>Non-Credit Instruction Agreement up to $25,000</td>
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<tr>
<td>Professional Service Agreement</td>
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<tr>
<td>Standard Lease Agreement (Lessee)</td>
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<td>Standard Lease Agreement (Lessor)</td>
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<tr>
<td>Use of Campus Facilities Agreement</td>
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<tr>
<td>Tennessee Miller Coliseum Use of Facilities Agreement</td>
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<tr>
<td>Tennessee Livestock Center Use of Facilities Agreement</td>
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</tbody>
</table>

Download form(s), enter the necessary information, then print to obtain the required signatures. Scan the completed form(s) back into your computer to attach to your MT Source Requisition before submitting.
IF YOUR REQUEST IS FOR **FUNDING** AND A SIGNATURE OR CONTRACT IS REQUIRED:

Complete the **Contract Office Form**

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Contract Office Form

**Supplier/Vendor Instructions**
When Supplier/Vendor is not setup in MT$ource, select **Supplier Unknown** as the vendor. Obtain and provide a W-9 form from the Vendor and attach as an ‘Internal Attachment’ so Procurement can set up the Supplier in Banner.

**Fulfillment Address**
Fulfillment Address 1: (preferred)

**Distribution**
The system will distribute purchase orders using the method(s) indicated below: Check this box to customize order distribution information.

Email (Plain Text)
Email (HTML Body)
Manual

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**General Info**

**Contract Signature Instructions:** If Contract has NOT been signed by Vendor/Contractor, please indicate in the text space below if the Contract should be returned to the Submitting Department to obtain the Contractor’s signature OR the Contract should be forwarded directly to Contractor for signature.

**Product Description**
Career and Technical Education as described in project proposal A99.2012

**Quantity**
1

**Unit of Measure**
EA - Each

**Estimated Price**
20000

**Date**
Contract Start Date: 2/1/2011
Contract End Date: 6/30/2014

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1 Note: Annual submission of this form will be required if funding is stipulated as a renewal.

**Contractor** is the non-MTSU party providing the funding.

Enter the TOTAL contract award amount.
For Contract/Document Approval and signature only, enter price as zero.

Dates of the entire funding duration.¹

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**Continue . . . . .**

A response is required in each section.
No Justification Contracts

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#1. Description of service:

N/A

#2. Explanation of the need or requirement placed on the procuring institution to acquire service:

N/A

#3. Name and address of the proposed contractor’s principal owner(s):

N/A

#4(a). Evidence that the proposed contractor has experience in providing the service:

N/A

#4(b). The length of time the contractor has provided the same or similar service:

N/A

#5(a). Was the service/funding ever provided to the Institution in the past?

N/A

#5(b). If so, what method was used to acquire the service and who was the contractor?

N/A

Notes:
Since funding requests are not purchases (that may require justification) no detail information is needed in these questions. However a response is necessary for the electronic processing. Enter ‘N/A’ for questions #1 - #7.
Complete all sections (each question requires an entry).

Blank forms for the university documents are located on the MTSU Contract Office web site: [http://www.mtsu.edu/contract](http://www.mtsu.edu/contract) or the Office of Research Services web site: [http://www.mtsu.edu/ors/index.shtml](http://www.mtsu.edu/ors/index.shtml)

Download form(s), enter the necessary information, then print to obtain the required signatures. Scan the completed form(s) back into your computer to attach to your MT Source Requisition before submitting.
2 - Once the Contract Office Form is complete, return to the top right
Select Add and go to Cart then Click Go.

3 - The Contract Office Form will transfer into your Shopping Cart,
Click Proceed to Checkout to continue.

Since it is not necessary to duplicate the information already entered on the
Contract Order Form, if the requisition has more than one line item, the
Non-catalog form should be used for the additional items.

4 - In your Draft Requisition, correct or update the necessary sections as
highlighted in your process flow diagram.
While in the **Final Review** of your Requisition:

5 - Make changes and upload necessary documents in the **Internal Notes and Attachments** Section.

Enter remark in **Internal Notes** if requisition is for Document Approval/Signature only (with zero dollars).
6 - Once all the information is entered and forms attached, **Click** Place Order to submit your Requisition.

7 - You will receive a confirmation of your submitted request.
8. Remember the COMMENTS Tab will allow you to communicate to other MT $ource Users by Email. Be sure to check their name to send them email notifications.
(Note: Comments can be entered at any time to a Requisition, Purchase Order, or Receipt)
9 - To view the progress of your Requisition, Click on the **PR Approvals Tab** to see the workflow status.

**REQUISITIONS WITH FUNDING REQUESTS**
TO CHANGE DEPARTMENT:

From the MT Source Home Page, click profile.

From the User Settings/User Identification tabs, locate Department.

Click the ▼ for the drop down.

FIND then Select the new Department. Click Save.

Complete this **BEFORE** starting your Cart.