



## Revenue Contract Set-up Checklist > \$25,000

### CONTRACT INFORMATION

Contract Name/Description.:	
Requestor Dept. Name:	
Requestor Dept. Contact:	
Requested Start Date:	
Requested End Date:	
Length of Term:	

### REQUESTOR DEPT. RESPONSIBILITIES

<input type="checkbox"/>	Submit \$0 value requisition in WolfMart indicating the IFR account that will receive funding	
<input type="checkbox"/>	Identify whether SBU is providing services or contractor is providing services.	
<input type="checkbox"/>	Provide contact information of customer or potential contractor(s) if known	
<input type="checkbox"/>	Provide a statement explaining the service to be provided and the need for the service	
<input type="checkbox"/>	Provide a Statement of Work (SOW) explaining the service and any deliverables to be provided	
<input type="checkbox"/>	Provide the quantity/frequency of the service to be provided	
<input type="checkbox"/>	If SBU is providing services provide the price(s) to be charged	
<input type="checkbox"/>	Provide a statement explaining how the compensation being paid to SBU is fair and reasonable	
<input type="checkbox"/>	Provide an estimate of the total value of the service to be provided over the contract term	
<input type="checkbox"/>	If services are to be bid provide a list of known sources of supply	
<input type="checkbox"/>	If SBU is providing services provide a copy of any customer proposed form of contract	
<input type="checkbox"/>	Identify any unique requirements specific to the services, e.g., hazardous material involved, etc.	
<input type="checkbox"/>	Assist Procurement Dept. with contract negotiation	
<input type="checkbox"/>	If SBU is providing services coordinate any invoicing of customer with Accounting Dept.	
<input type="checkbox"/>	Manage services once contract is approved by AG & OSC	

## PROCUREMENT DEPT. RESPONSIBILITIES

<input type="checkbox"/>	Review SOW and deliverables applicable to services	
<input type="checkbox"/>	If SBU is providing services incorporate SOW & deliverables into SBU contract template and send contract to customer for review/negotiation	
<input type="checkbox"/>	If a contractor is providing services incorporate SOW & deliverables into a solicitation document for bidding	
<input type="checkbox"/>	Send solicitation document to firms on the bid list	
<input type="checkbox"/>	Be central point of contact for the bid process and customer/contractor communication and contract negotiation	
<input type="checkbox"/>	If necessary, send contract to local counsel for review as to form	
<input type="checkbox"/>	Perform a responsibility review of the customer or contractor. Contracts exceeding \$100K require customer/contractor to fill out a NYS Vendor Responsibility Questionnaire	
<input type="checkbox"/>	After contract is executed and reviewed by local counsel send contract to AG for review. Serve as central point of contact for communication with AG & OSC	
<input type="checkbox"/>	Obtain required proof of insurance from customer/contractor	
<input type="checkbox"/>	Maintain a procurement record and contract file for each revenue contract	