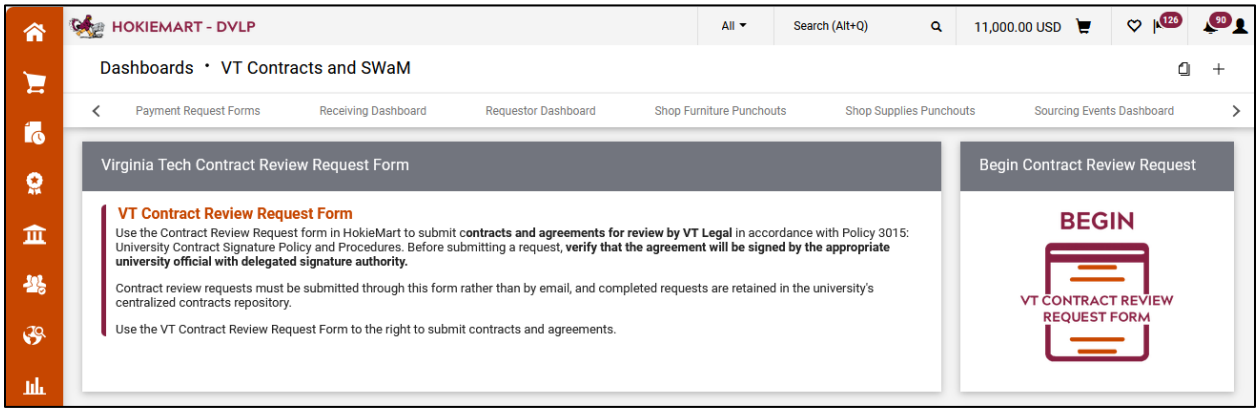
Submitting a Contract Review Request Form

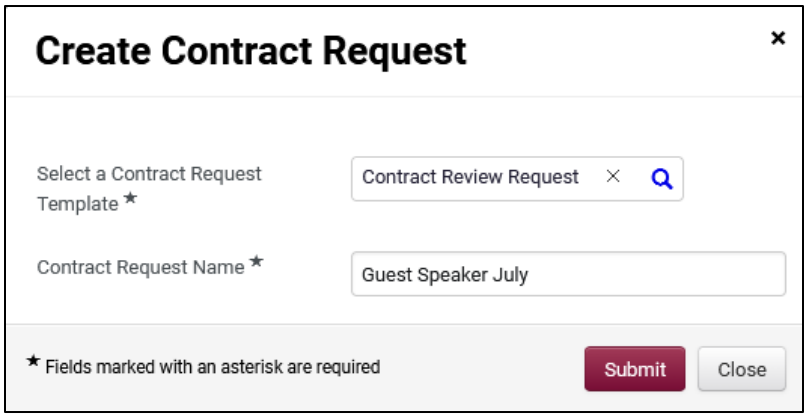
The Contract Review Request form is used to route contract documents to VT Legal for streamlined review. Once requests have completed workflow, departments should have guidance and actions on their contract. Requests that have completed workflow will be cataloged in the centralized contracts repository.

Steps to submit a form

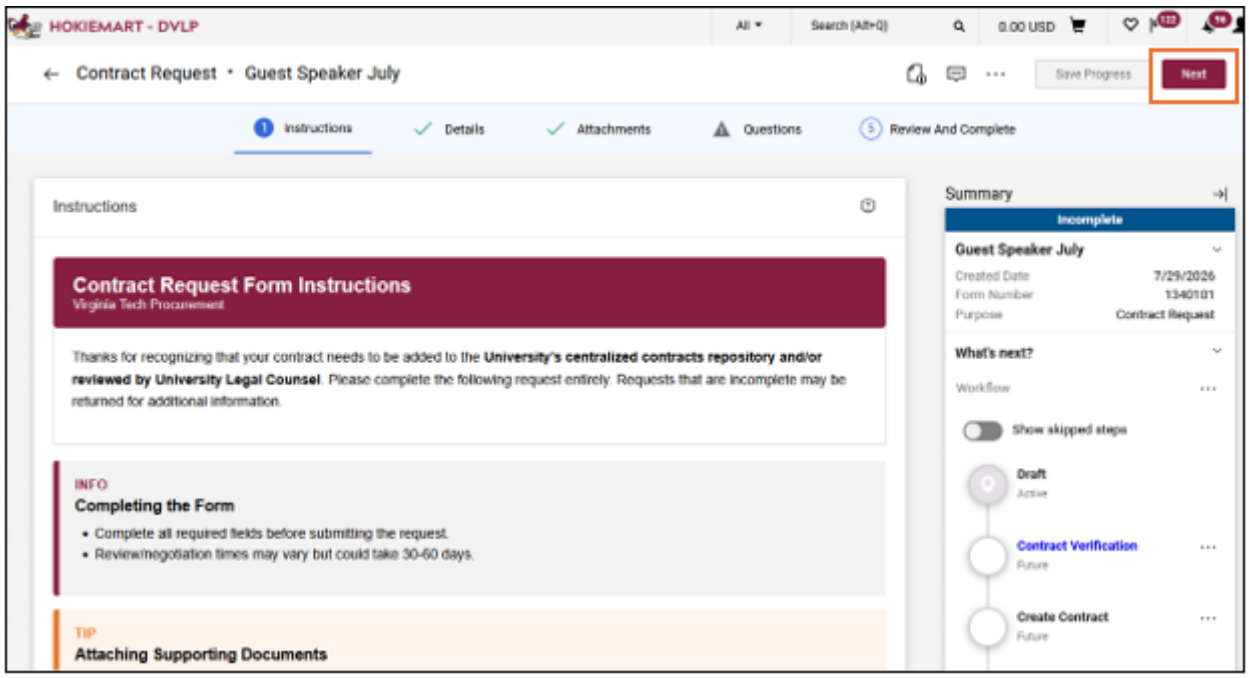
Select the Contract Review Request tile on the Contracts Dashboard:



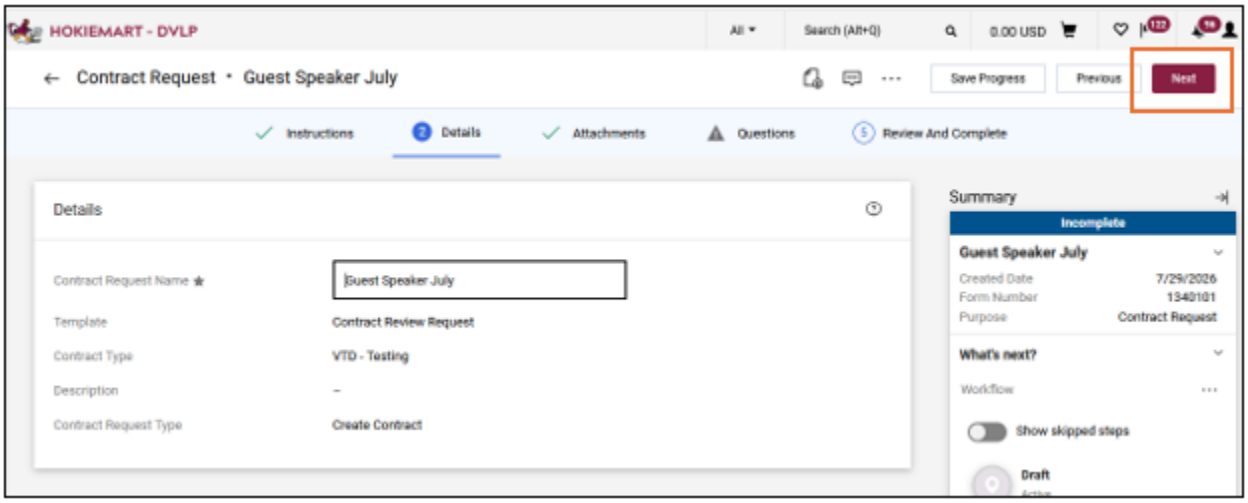
Select Contract Review Request for the template type and then type in a name of the contract request. Best practice suggestion would be to name the request Second Party + start date of contract.



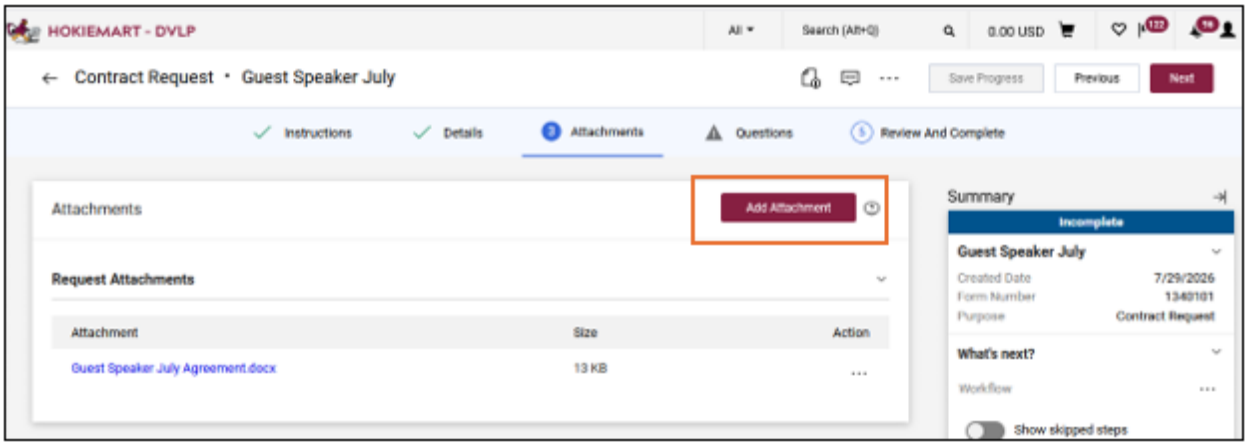
The first page of the form contains instructions. Read through the instructions for important information on entering the form. Then select **Next** to proceed.



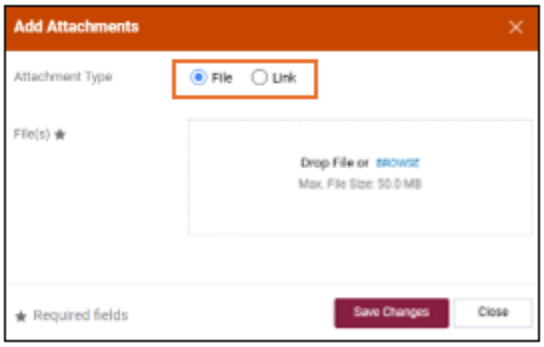
The **Details** tab allows the user to edit the request name if needed. Otherwise, select **Next** to proceed.

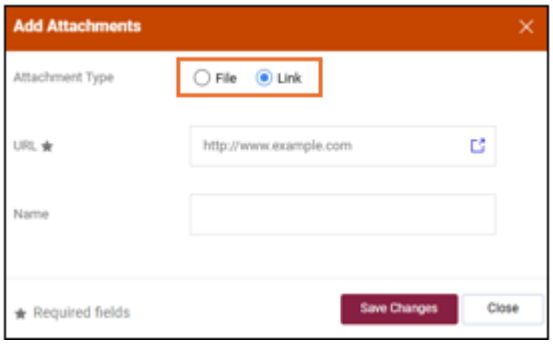


Select **Add Attachment** to upload the contract needing review to the Attachments tab. Additionally, provide all exhibits, statements of work, linked documents and/or amendments in the Attachments section.



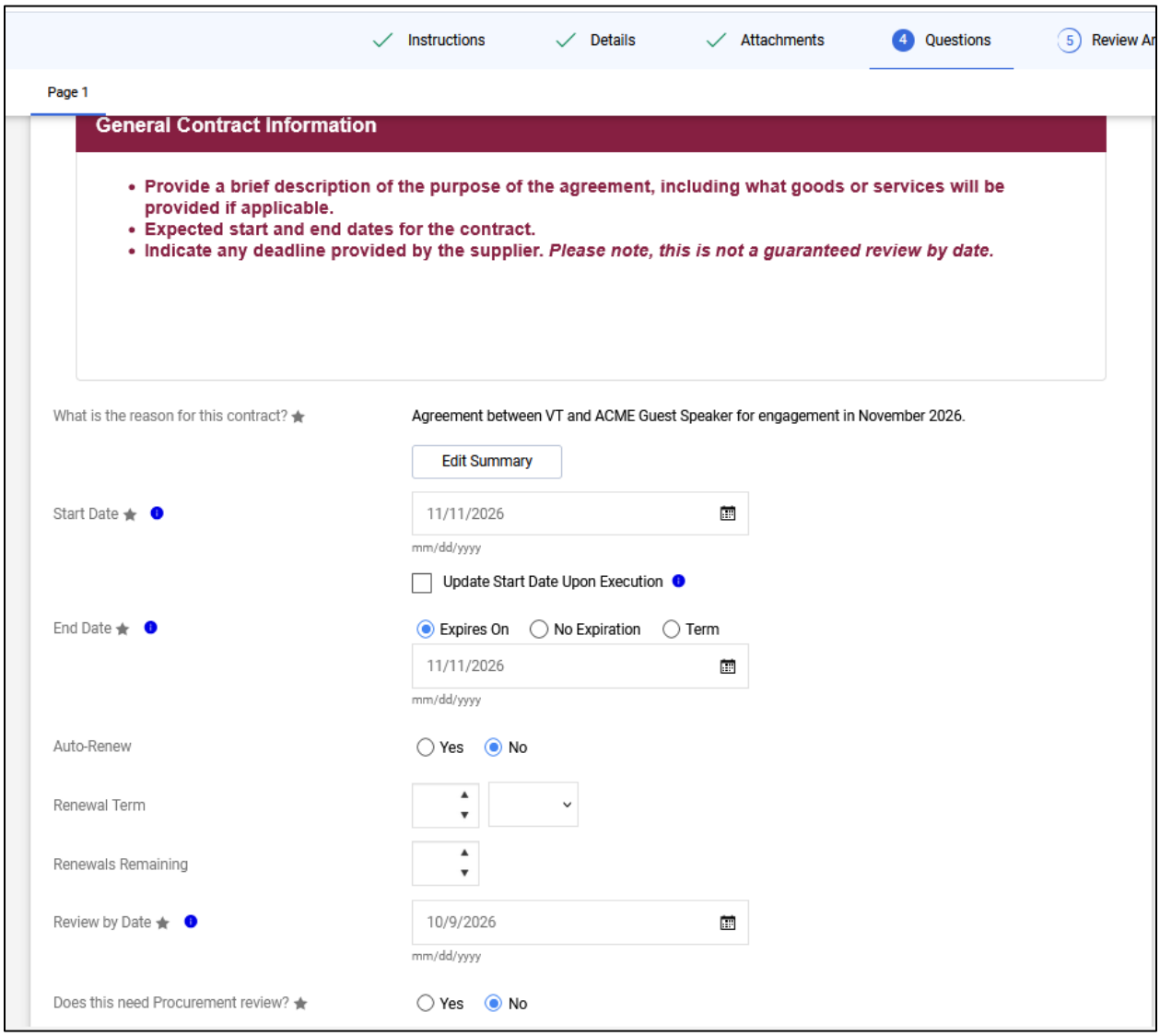
If the file exceeds the maximum file size of 50MB, users can upload a link to a secure SharePoint or Dropbox containing the contract. Please ensure you allow appropriate access to the file for reviewers if providing a link.





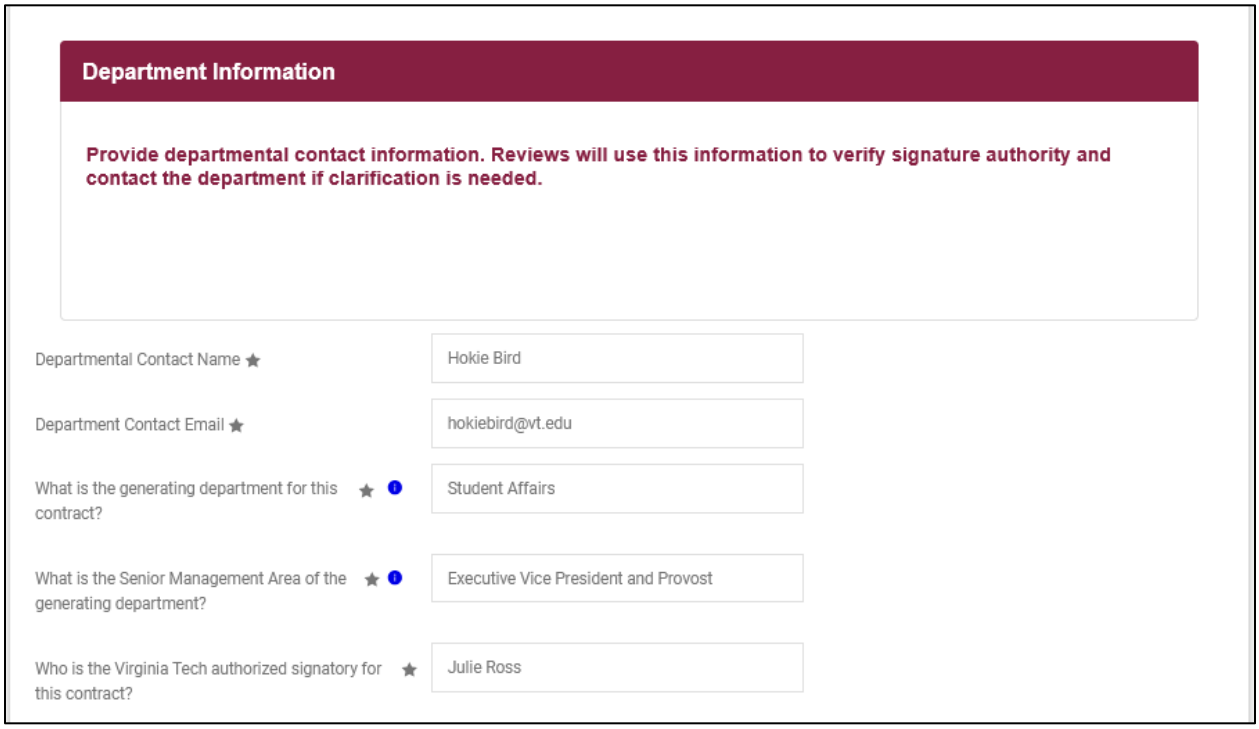
After submission, VT Legal will download the attached document(s) as part of the workflow review process to conduct their review and provide comments. Once their review is complete, they will upload a marked-up version of the document(s) for the department to review and address.

The **Questions** tab contains relevant information needed for review of the contract.

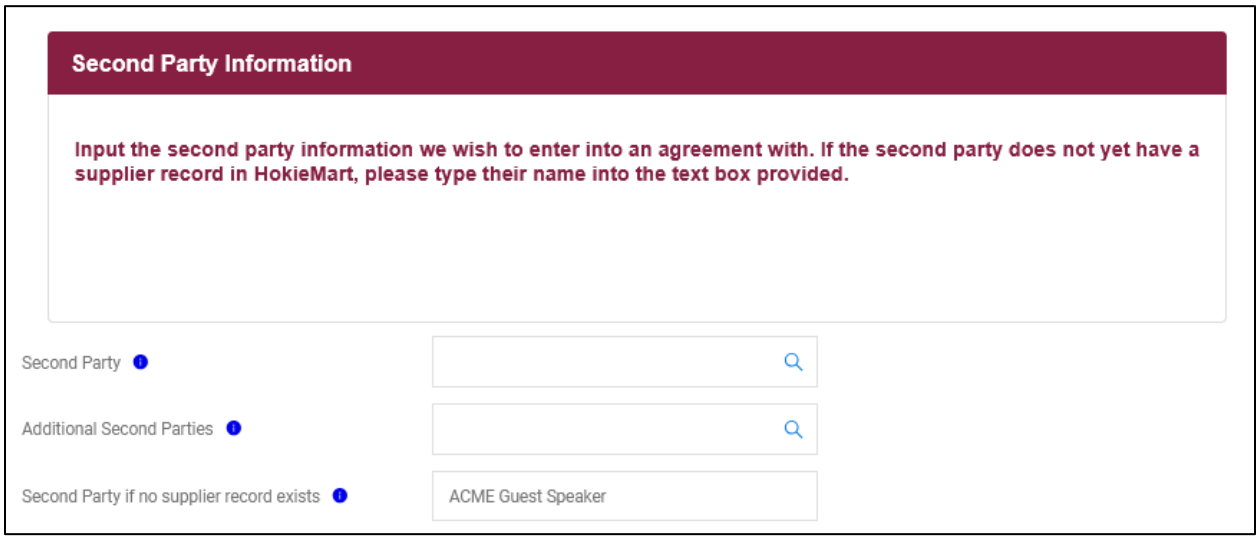


Provide information such as a reason for the contract, start and end dates of the agreement, and any renewal information. If there is no renewal, those fields can be left blank. Indicate if review by the Procurement office is needed.

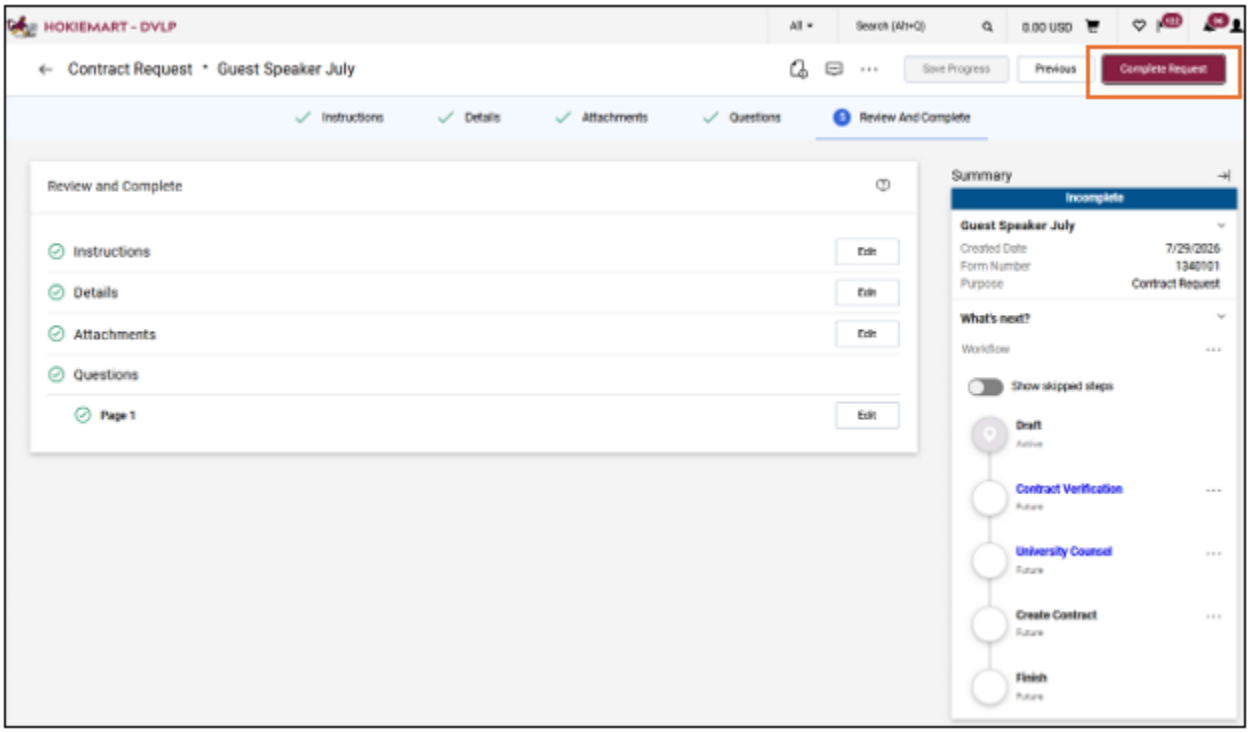
Type in departmental information including the point of contact for any questions on the agreement, the department and senior management area, and the authorized signatory for this agreement. If the authorized signatory is not known, please refer to the university's signature policy.



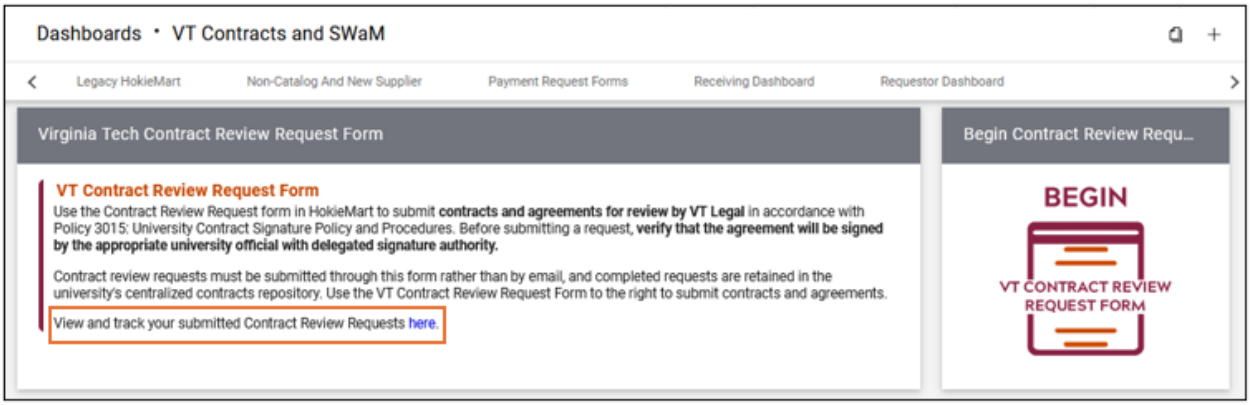
The second party is the supplier's name for whom we wish to enter into an agreement with. Type the supplier name into the Second Party field and select the supplier. If no supplier record exists when typing the name in to the Second Party field, manually type the supplier in to the **Second Party if no supplier record exists** field.

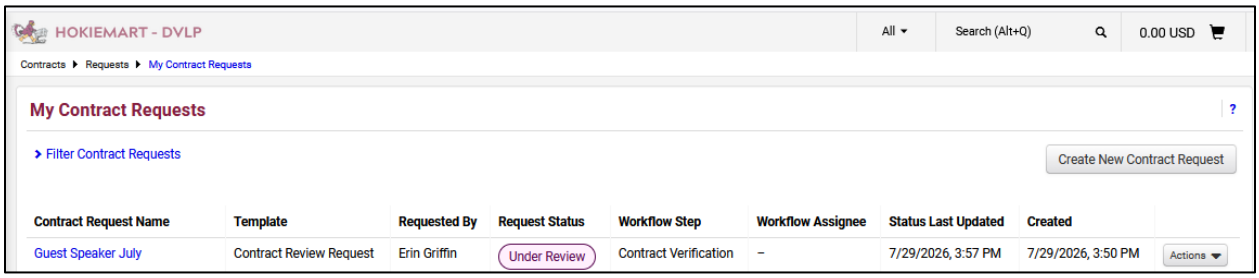


When all tabs have been completed, select **Complete Request** to submit for review.

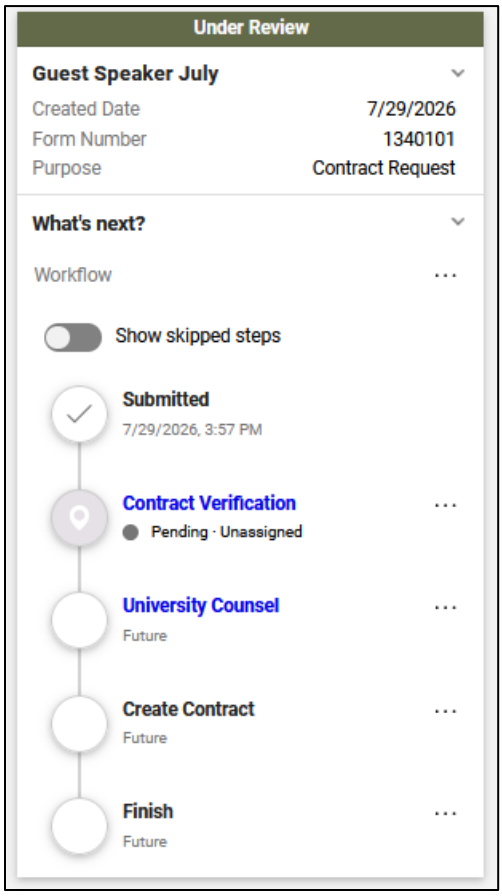


A listing of your submitted contract review requests can be found on the Contracts and SWaM Dashboard.

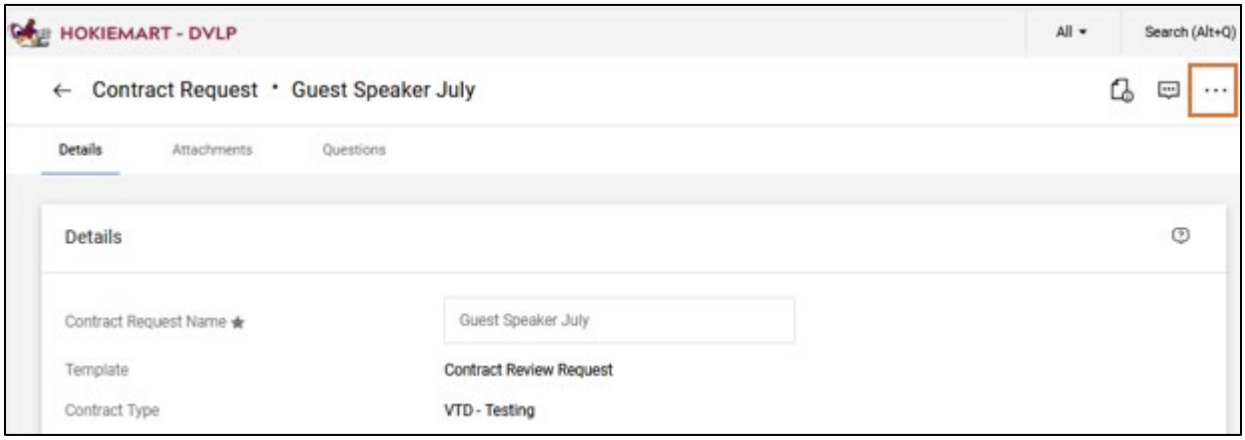




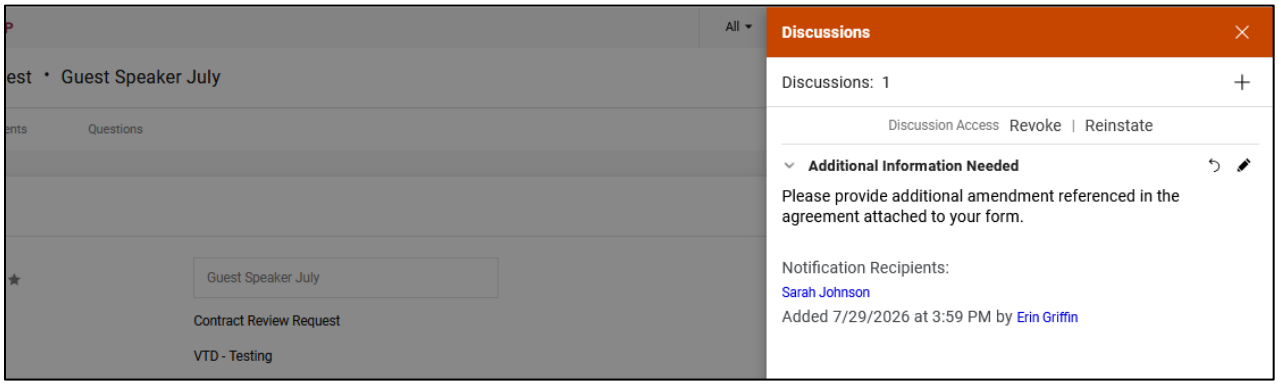
The workflow for each request can be found within the form. Users can check to see where the request is in the review process. Select the workflow to see specific approvers for each step.



Approvers may comment to the department asking for follow-up information, to provide an update, or to communicate next steps for processing. Departmental users will receive an email notification with the message from the approver or can view discussions directly on the form by selecting the breadcrumbs at the top right-hand corner of the form.



Departments can reply to discussions within the form.



Once the form completes workflow, users can download their contract document containing markup and comments from VT Legal on the Attachments tab and proceed accordingly per University Counsel guidance.

Requests that have completed workflow will be cataloged in the centralized contracts repository. Please note, these contract records will not be selectable on a requisition.

If additional reviews are needed for the same agreement, please begin a new Contract Review Request.