STEP 1: Does this belong in UGAMart or OLA Routing?

• OLA Routing (use Routing form on white paper and LT Member emails to respective Admin Team member, who indicates approval and forwards along to Marshall Chalmers) if any of these apply:
  • No money is exchanged
  • Both entities are UGA (MOUs)
  • Money is coming to UGA
  • Academic experiential Agreements
  • Consulting agreements within the USG

STEP 2: Is the vendor already in UGAMart?

• If so, then process a cart in UGAMart as you normally would. It will be encumbered on your account.
• If no, AND the contract is not for speaker or entertainer, skip to STEP 4.
• If yes, vendor is in UGAMart, the signator on the contract is UGA AND contract will be paid by a UGA Foundation account, skip to STEP 4.

STEP 3: Request and receive email approval from VP Wilson

• Send an email to VP Wilson, copying your admin team member, to request approval to bring speaker/entertainer to campus. In this email, include 4 pieces of information:
  • the name of the speaker/entertainer
  • the date of the event
  • the nature of the performance, including any potential topics that might be discussed
  • the contract price
• DO NOT attach the contract to this email

STEP 4: Create the cart in UGAMart

• Select "UGA Student Affairs Contract" from the vendor list
• Enter a description of contract
• Quantity "1"
• Enter the price of contract
• Attach the contract document(s)
• In a separate attachment, attach email from VP Wilson -- ONLY REQUIRED for speaker/entertainers
• If the contract is to be paid by foundation funds, place an internal note that states "Foundation payment involved" and which details what items the Foundation will be paying for, if not the entire amount.
• Enter the accounts paying for the contract
• Use object code 75300 (contracts) if desired.
• Account info is for routing purposes only. This process WILL NOT create an encumbrance. You need to track the contract price on your internal spreadsheet that use for monthly reconciliations.
• Once you submit for approval, these contracts will follow the same approval paths currently in place for the department/account selected.

STEP 5: Enter the accounts and submit the cart for approval

Once Procurement reviews and signs the contract, the system will generate an email that goes to Susan Cowart. Susan will forward the email to the requisitioner to let them know the contract has been signed by Procurement.
**UGA Student Affairs**

**Contract Routing Process**

- **Is the contract for the PURCHASE of goods or services (including performers)? Is money coming FROM UGA as a result of the contract?**
  - Yes
  - No

- **Is the contract with an external entity (i.e. NOT another UGA entity or BOR school)?**
  - Yes
  - No

- **Email to Admin. Team member. Admin team member will review/approve and send to OLA for review. OLA will return it to the specified director of the unit for signature.**

**Notes:**

1. Once the contract is signed by procurement, it is the department’s responsibility to encumber the funds on their spreadsheets. UGAMart will not encumber the funds – just using UGAMart to route the contract for review and signature. We will also continue to pay for these contracts on check request.
2. Each UGAMart contract for performer/speaker will have at least two attachments: VP Wilson’s email approval and the contract itself. No need to attach contract to email seeking VP’s approval – he just needs to know and approve who is coming.
3. We will continue to have the exception to pay for speakers on check request.
4. If the contract to be signed by Procurement is to be paid by foundation funds, please be sure to include “Foundation payment involved” in the internal notes section, and detail which items the Foundation will pay for, if not the entire amount.