

## **The Contract Life Cycle in IntelAgree**

1. A Departmental User (DU) submits a Request for Single Contract.
2. Intake includes collection of information regarding expenditure of university funds, budget code, account name, balance remaining in the account, total value of the contract, party identification, party contact name and email, and other details that aid in efficient review and approval. The DU uploads a copy of the proposed contract, and can upload attachments such as purchase requisition, W-9 forms, certificates of insurance, and correspondence related to the contract. DU's are requested to provide the name(s) and email address(es) for all other party officials who will sign the contract.
3. If a contract involves branding or marketing, construction or renovation of facilities; computer hardware or software; or grant funding, it is referred to Marketing, Facilities Management, Information Technology Services and/or the Office of Sponsored Research & Programs, respectively, for preliminary approval. These approvals are required before a contract moves to step 4.
4. When a contract requires expenditure of university funds, the contract record created in steps 1 and 2 is sent to Accounting and Procurement (in that order) for required approvals. In appropriate cases, Accounting verifies funds availability and Procurement issues a Purchase Order. Only after Accounting and Procurement approve the contract will it move to the Office of General Counsel. If the contract does not require expenditure of funds, approval by Accounting and Procurement is not required and the contract moves directly to the Office of General counsel.
5. After approvals in steps 3 and 4 (where required), the contract is sent to an attorney in the Office of General Counsel (OGC) for legal review. The contracts are assigned to and handled by different attorneys. DUs may determine which attorney is assigned a contract by reviewing the Executive Summary for the contract in IntelAgree. After an attorney is assigned, DUs may communicate with staff in OGC via the "Comments" box by typing "@," typing the first few letters of the person's name, and clicking on the name that appears on the drop down menu. The comments are transmitted to recipients via email generated by IntelAgree.
6. The attorney either approves the contract in its current form or recommends edits and uploads a new version reflecting the edits (usually a redline markup). If edits are recommended, the attorney sends the contract to the DU via email through IntelAgree with a request that the DU communicate with the other party to obtain approval of the edits. The DU relays the other party's response to the OGC attorney assigned to the file. If the other party approves the proposed edits, the attorney prepares a signature copy and sends it to Amy Rutledge in OGC. Ms. Rutledge prepares the contract for e-signatures and routes the document to all required signatories in the specified order.
7. If edits proposed by the OGC attorney are rejected by the other party, the attorney will work with the DU and university leadership on negotiations in an effort to reach agreement. If negotiations are successful, the steps outlined in item 6 are followed.
8. Unless otherwise requested, Campbell University officials execute contracts first. When the last necessary university official signs, an email is sent to the designated official of the other party with an invitation to sign the contract in IntelAgree. That person may download a copy for review, sign electronically and retain a copy of the fully executed agreement for their records. The DU and staff in Procurement and OGC receive email notifications that the contract has been executed. The DU should also be able to download a copy of the executed agreement if needed.
9. IntelAgree uses artificial intelligence to "read" contract documents and extract specific information that aids in searching records and management of renewals and terminations. A DU can also trigger notifications by providing an expiration date on the first page of the smart form for each contract requested. The OGC receives reports generally 90-120 days before a contract is set to expire or automatically renew. The OGC will consult with departmental users and

university leadership on decisions to renew, terminate or allow contracts to expire without further action.

10. When the agreement is signed, IntelAgree will send the DU an email notification. Procurement will wait for word from the DU to pay the vendor. When all work is completed and deliverables are received by the department, the DU should send the invoice, a copy of the executed agreement, and receiving report to the Procurement Department. Payment is then issued to the vendor.