

**CONTRACT REVIEW  
CHECKLIST EFFECTIVE 2018**

**Proposed non-competitive contracts with a term of more than one year or which contain a provision to allow for extension by either party that would extend the contract beyond 12 months and which have a cumulative value of not less than \$250,000, including all possible extensions; and**

**Any amendment to a contract (meeting the \$250,000 and over one year threshold) *must* be presented to the Fiscal Review Committee (FRC), *60 days prior to the proposed effective date*, if it meets *any* of the following conditions:**

- **increases or decreases the maximum liability;**
- **extends or shortens the original term of the contract;**
- **changes the entity or name of the entity with which the state is contracting; or**
- **otherwise changes an original contract or amended contract in a substantive manner.**

***If a department or agency is unsure if a contract or amendment meets the criteria of the FRC and should be submitted for review and commit, please contact the FRC staff for a determination.***

**Use the following checklist to ensure copies of the proper documentation has been submitted to the FRC staff:**

- SUMMARY LETTER**
  - **Detailing terms of contract or amendment and detailed justification of why the goods or services should be acquired through non-competitive negotiation.**
  - **If request is submitted less than 60 days before effective date, a detailed explanation for why the request is late. PLEASE NOTE: LATE SUBMISSIONS WILL BE ROLLED FOR ONE COMMITTEE MEETING AND PLACED LAST ON THE AGENDA.**
- SUPPLEMENTAL DOCUMENTATION FORM – Form must be completely filled out with back-up documentation from Edison of total expenditures on the date submitted. No requests will be placed on the agenda if this form is not complete.**
- APPROVED RULE EXCEPTION REQUESTS (if appropriate)**
- APPROVED OFFICE FOR INFORMATION RESOURCES (OIR), eHEALTH, OR HUMAN RESOURCES PRE-APPROVAL ENDORSEMENT REQUESTS (if appropriate)**
- SPECIAL CONTRACT REQUEST**
- SUMMARY SHEET FOR CONTRACT (original or proposed)**
- ANY REVISED SUMMARY SHEETS**

- **ORIGINAL CONTRACT**
  - **If *new* non-competitive contract, actual language of the proposed contract (can be in draft form if necessary).**
- **SUMMARY SHEET FOR EACH PRIOR AMENDMENT**
- **ALL PRIOR EXECUTED AMENDMENTS**
- **REQUEST FORM and SUMMARY SHEET FOR PROPOSED AMENDMENT**
  - **If *new* amendment, actual language of the proposed amendment (can be in draft form if necessary).**
- **COPY OF PERFORMANCE BOND IF REQUIRED IN THE CONTRACT (if performance bond must be renewed each year, a copy of the renewal)**
- **ANY ADDITIONAL SUPPORTING DOCUMENTS**
- **FULLY EXECUTED COPY OF FINAL DOCUMENT IMMEDIATELY UPON RECEIPT BY THE DEPARTMENT**

University will submit all renewals and amendments of any kind to Fiscal Review for review and approval per T.C.A. § 4-56-107.

Please contact us if you have any questions at [appurchasing@apsu.edu](mailto:appurchasing@apsu.edu) or 931-221-7032