UCI Purchasing Agreement – Intake Form

**IMPORTANT:**

An executed Purchasing Agreement and/or approved Purchase Order must be in place before services may begin see [UCOP BUS-43](https://policy.ucop.edu/doc/3220485/BFB-BUS-43) and [UCI 707-10](http://policies.uci.edu/policies/procs/707-10.php). Please submit the completed Intake Form together with the completed draft Purchasing Agreement documents to contracts@uci.edu for review prior to circulating for signatures.

Make sure you have the following information available before filling out the Purchasing Agreement:

|  |  |
| --- | --- |
| **Purchasing Agreement Information Checklist** |  |
| * *Supplier’s name, authorized Supplier Signatory’s full name and email*
 |[ ]
| * *PI name, department and contact information*
 |[ ]
| * *Scope of Work: a description of the services, including any deliverables/reports/dates/milestones*
 |[ ]
| * *Duration of the services (What are the beginning and end dates?)*
 |[ ]
| * *Location of services - Will any of the services be performed on University property?*
 |[ ]
| * *Value/Amount of agreement*
 |[ ]
| * *Sources of any federal funding*
 |[ ]
| * *Name and email of Department Signatory (department budgetary officer)*
 |[ ]
| * *KFS Requisition Document number approved by department fiscal officer*
 |[ ]

|  |  |  |
| --- | --- | --- |
| **Will the services involve access to restricted/sensitive data?** | **YES** | **NO** |
| * *PHI (protected health information)*
 |[ ] [ ]
| * *PII (personally identifiable information)*
 |[ ] [ ]
| * *Student records*
 |[ ] [ ]
| * *University networks/data systems*
 |[ ] [ ]

If any of the restricted/sensitive data questions have been answered with a “YES”, then an appendix (for HIPAA and/or Data Security) must be incorporated into the agreement. Contract Services will provide the required appendix. For more information regarding restricted/sensitive data see [UCI Information Security and Privacy - Data Classification](https://security.uci.edu/security-plan/plan-classification-protection.html)

|  |  |  |
| --- | --- | --- |
| **Also consider the following:** | **YES** | **NO** |
| * *Is this individual currently employed by UC?*
 |[ ] [ ]
| * *Was this individual a University employee at any time during the past 12 months?*
 |[ ] [ ]
| * *Was the selection of this individual made or influenced by a near-relative who is a UC employee?*
 |[ ] [ ]

If any of these questions have been answered with a “YES”, please contact Human Resources at (949) 824-7276 for additional assistance.

If you have any questions about this coversheet, call Procurement Services at (949) 824-6516
or email the Contract team at contracts@uci.edu.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Services identified as a “[Low Risk Procurements](https://procurement.uci.edu/_files/documents/contracts/low-risk-procurements.pdf)” do not require an executed Purchasing Agreement. Such Low Risk Procurements require an approved Purchase Order, subject to [UC Terms and Conditions of Purchase](http://www.ucop.edu/procurement-services/_files/Legal%20docs/legal-forms-current/uc-terms-conditions-v5-9-19.pdf) before services may begin.