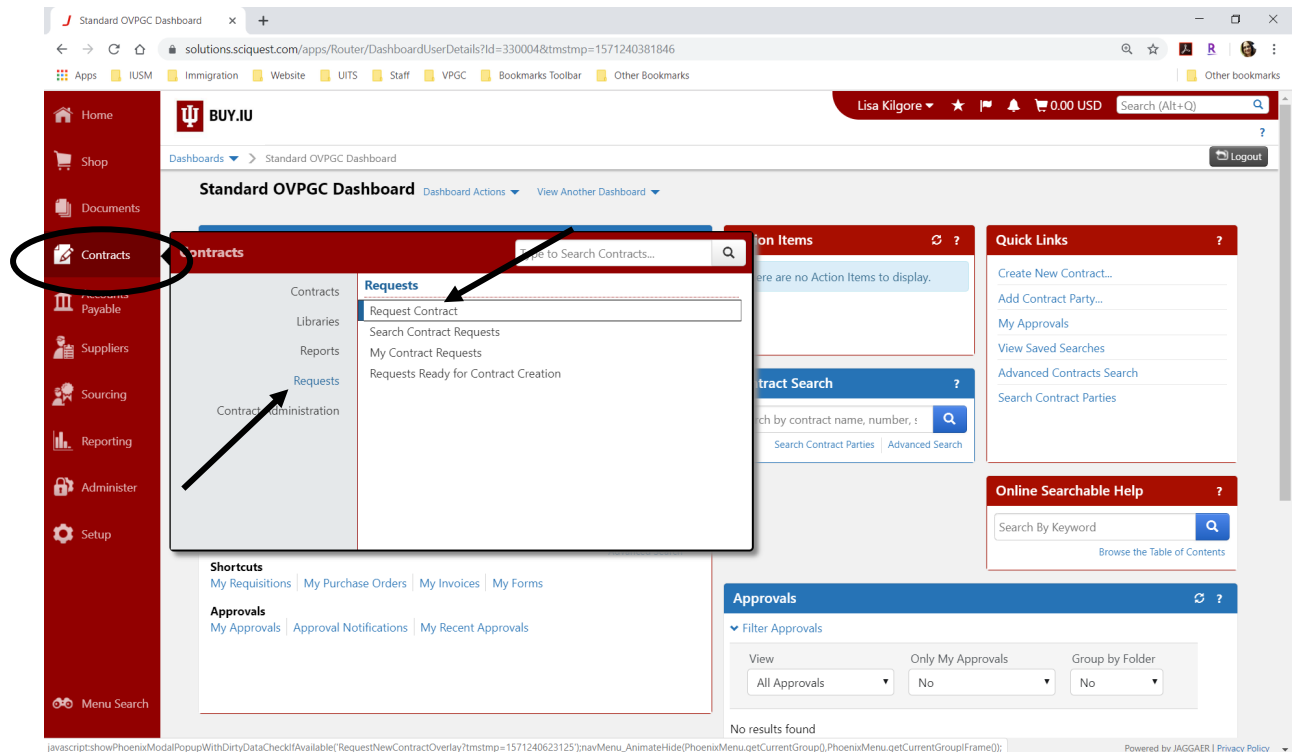


HOW TO PROCESS AN AFFILIATION AGREEMENT

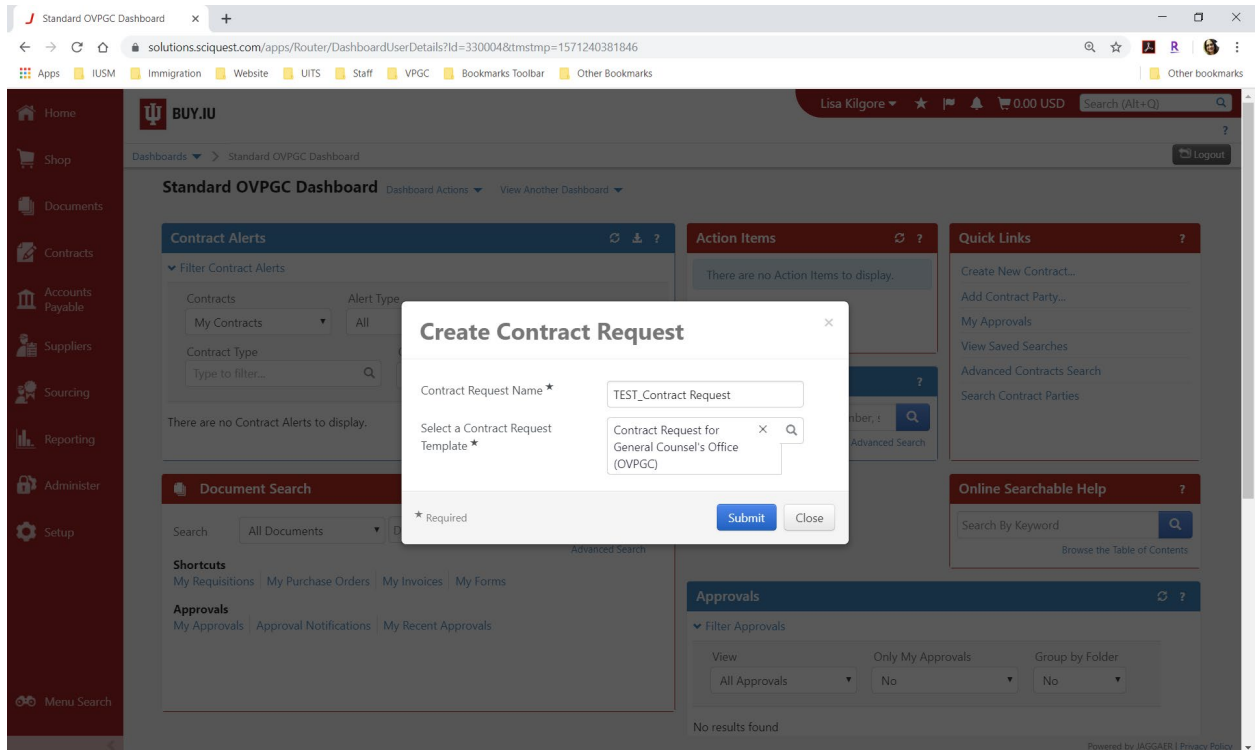
This documentation should be used by University departments and their users to submit an affiliation agreement to the General Counsel’s Office for review and/or processing.

Steps to submit a contract request:

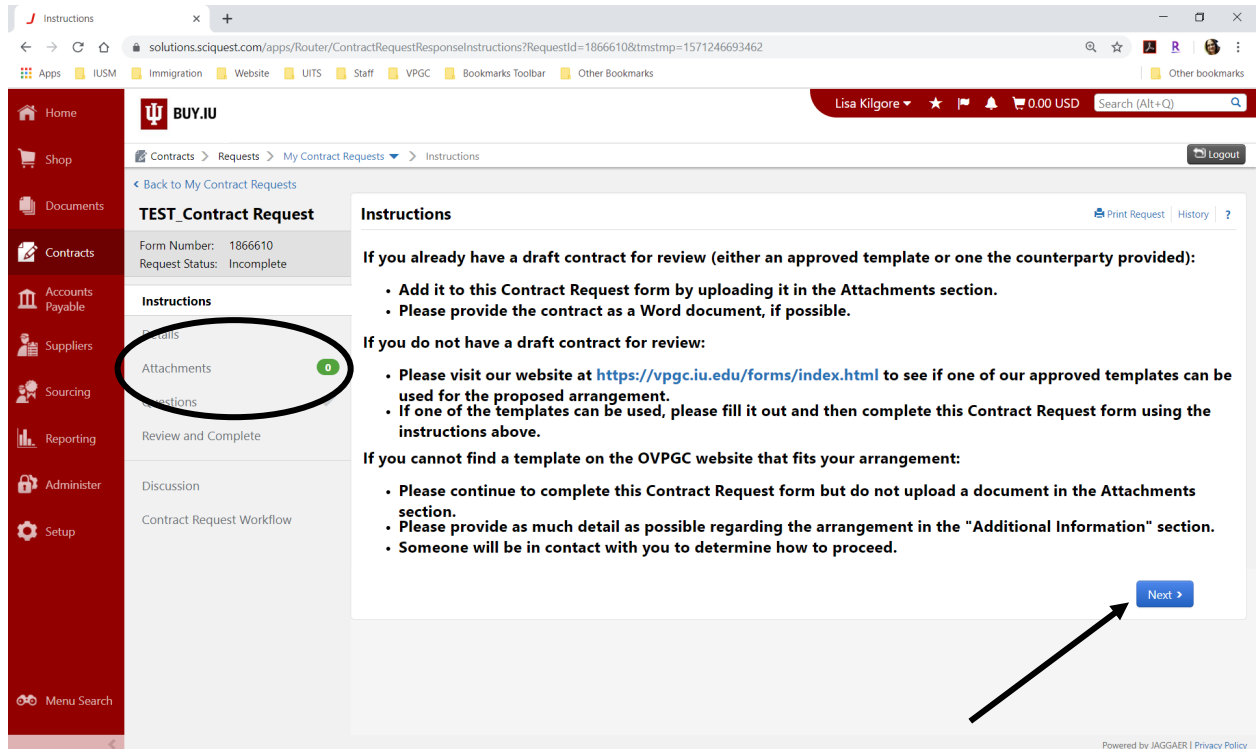
1. Log in to Buy.IU at **buy.iu.edu** using your IU Login credentials.
2. Click on the **“Contracts”** fly-out on the left side, hover over **“Requests”** in the grey box, and then click on **“Request Contract”** in the white box to the right.



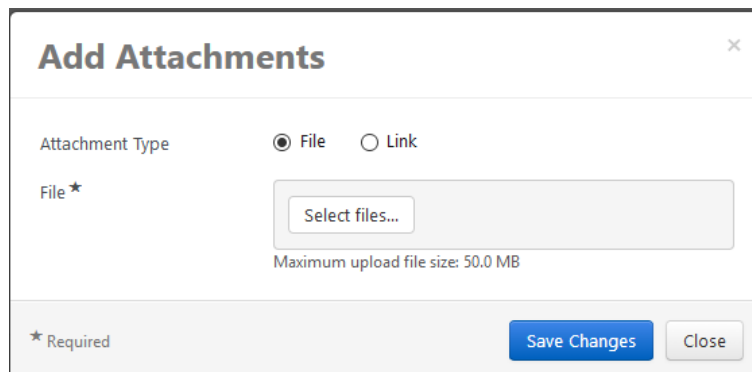
3. **Enter a name for your Request.** You will need to refer back to this request to check status of an agreement so use a format that will allow you to remember the request.
4. Under “Select a Contract Request Template,” **choose “Contract Request for General Counsel’s Office (OVPGC)”** and then hit “**Submit**”.



5. You can either **proceed through the next two pages (“Instructions” and “Details”)** by clicking on **“Next”** or you can **skip to the “Attachments” page.**



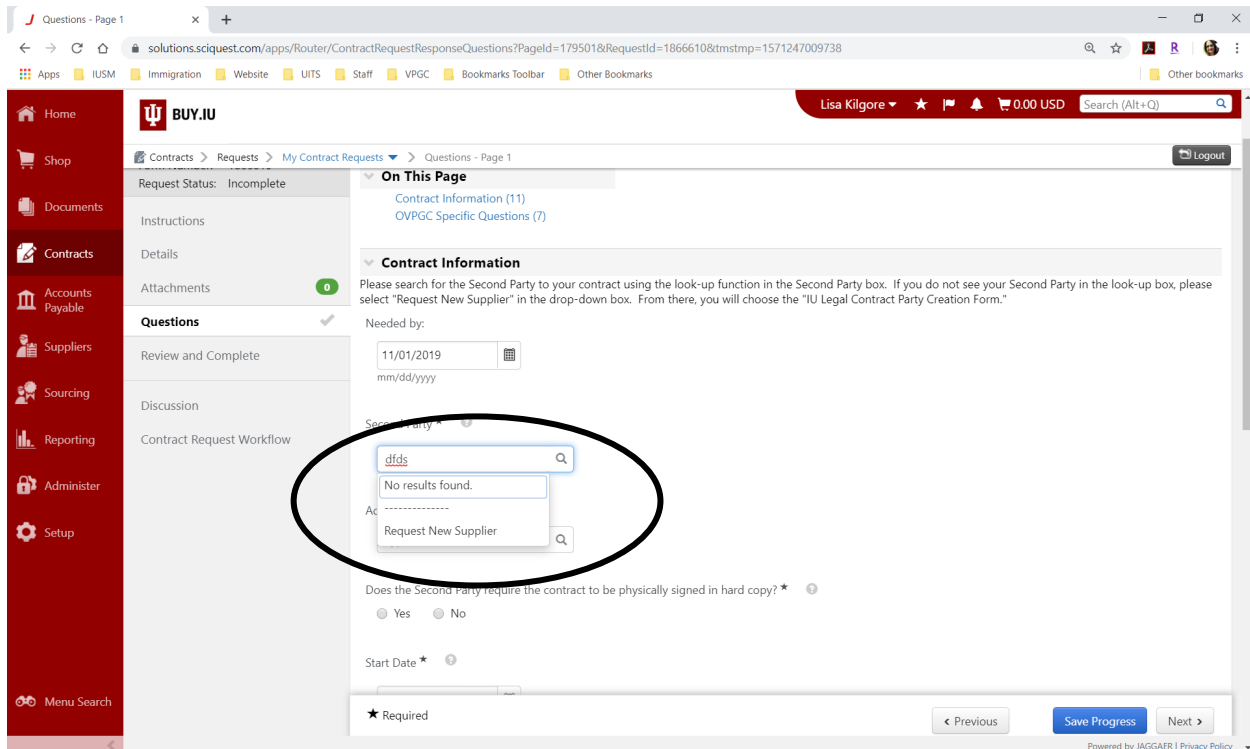
6. On the **“Attachments”** page, **click the “Add Attachments” button** to upload the agreement that you want the General Counsel’s Office to review.
- We strongly prefer that you upload a Word document.**
 - For **“Attachment Type”** the radio button **“File”** should be selected. **Hit “Select files”** to search your computer for the agreement you wish to upload.



- Click on the file you wish to upload and hit **“Open”**. Once the document has been uploaded, hit **“Save Changes”** on the bottom right of the **“Add Attachments”** box.

The agreement should appear on the “Attachments” page. If you have any additional documents to upload (previous agreements or agreements that need to be amended), please repeat this step; otherwise, click the “Next” button at the bottom right. (If you uploaded the wrong document, you can delete it by clicking on the “Actions” dropdown menu next to the uploaded attachment and then clicking “Delete”.)

7. Hit “Save Progress” on the bottom right of the screen and then begin to **fill out the fields in the two sections on the “Questions – Page 1” page**. The first section is “Contract Information” and the second section is “OVPGC Specific Questions”. The fields with an asterisk (*) on the end are mandatory.
 - a. **Insert the “Needed by” date.** Please note that this is a suggestion. There is no guarantee that we will be able to have the agreement in place by the requested date.
 - b. **Search for the counterparty (Facility) in the “Second Party” look-up field.**
 - i. If you find the Facility’s name in the look-up field, click on that name and continue with the form.
 - ii. If you do not find the Facility’s name in the look-up field, the dropdown should say “No results found” and provide an option to “Request New Supplier”. Click “Request New Supplier.”



- a) A box entitled “Confirm” will appear and ask you the following, “Are you sure you want to request a new supplier? You will be navigated away from this page and may lose unsaved changes.”
 - o Click “Yes”.
 - o A box entitled “Request New Supplier” will appear. From the “Select a supplier request form” dropdown, select “IU Legal Contract Party Creation Form”.
 - o Enter the Facility’s legal name in the “Supplier name” field and then hit the “Submit” button in the lower right of the box.

- b) On the “Instructions” page in the IU Legal Contract Party Creation Form, read the text and then click the “Next” button in the bottom right.
- c) On the “Questions – Company Overview” page, fill out the Facility’s legal name, and the name and email address for the relevant contact at the Facility (the contact’s name is optional). Then click the “Next” button on the bottom right.
- d) Check the box on the next page in the “Certification” section to certify that the information is accurate and then hit “Complete Request” on the bottom right.

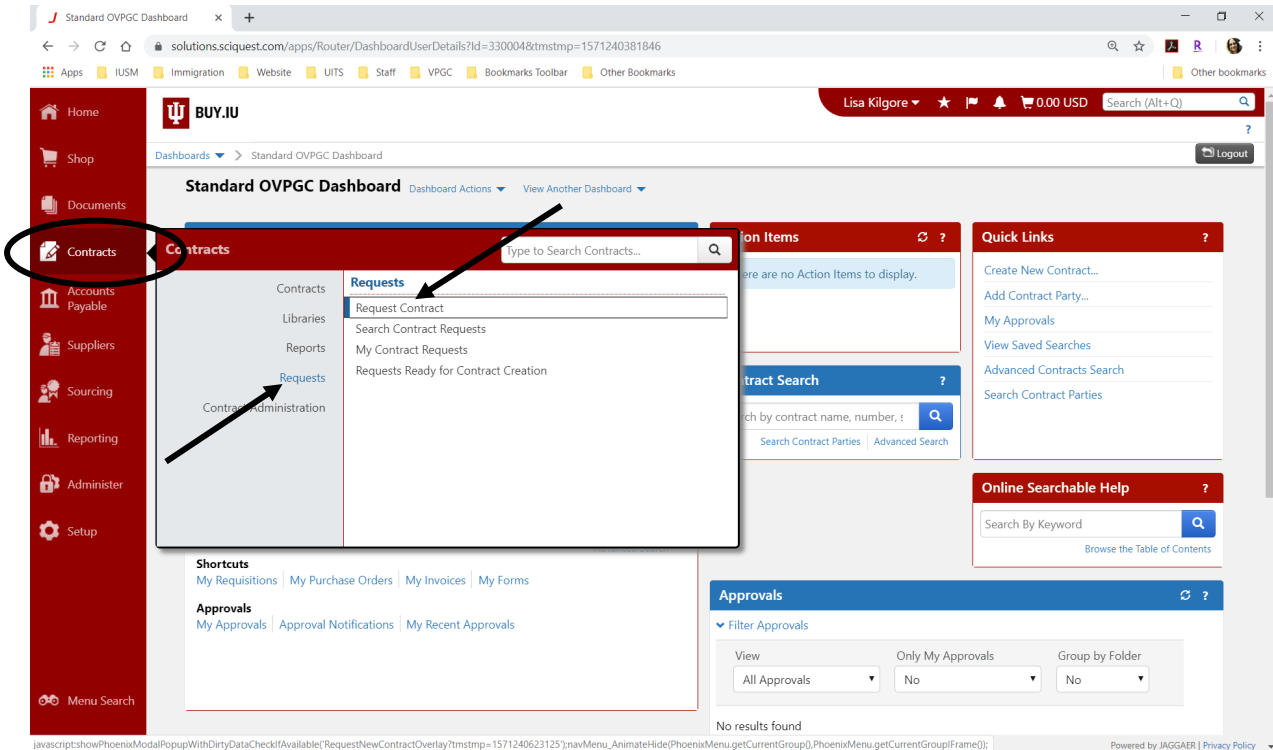
Section	Progress
Instructions	✔ No Required fields
Questions	✔ Required fields complete

Certification

I certify that the statements and information in this request are true and correct to the best of my knowledge and belief.

When the “Confirm” box appears, hit “Yes” that you are ready to complete the new supplier request.

- e) Navigate back to your Contract Request by clicking on the “Contracts” fly-out, hovering over “Requests” in the gray box and clicking on “My Contract Requests”



- f) Click on the Contract Request on which you were working. (You can either click the relevant name under the “Contract Request Name” column or click the “Actions” button on the right side and then click “Edit” in the dropdown.)

8. If you navigated away from the “Questions – Page 1” page to Request a New Supplier, navigate back to the “Questions – Page 1” page and continuing filling out the fields. (You can navigate back to this page by clicking “Questions” in the gray column on the left or by clicking “Next” three times.)
 - a. **“Additional Second Parties” field** – This is not a mandatory field. This field can be left blank.
 - b. **“Does the Second Party require the contract to be physically signed in hard copy?” field** – In other words, does the Facility require us to use their own electronic signature system or requires the agreement to be signed in blue ink, etc. The VA and any agreements with the State of Indiana falls within this category. You will still submit the agreement via Buy.IU but you will answer “yes” to this question.

- If no, add the name and email address for the individual at the Facility who will sign the contract. If the contract will be signed by more than one person at the Facility, please indicate that in the “Additional Information” field at the very bottom of the form.
 - c. **“Start Date” field** – Enter the start date for the agreement.
 - d. **“End Date” field** – Select “Expires On” and enter the date on which the agreement should end.
 - e. Skip the field that says, “Auto-Renew – Purchasing or Legal Counsel Use Only”
 - f. If the Contract Request is for a renewal of, or an amendment to, an existing agreement, indicate that in the applicable field and provide the document number of the existing agreement if already in Buy.IU. If the agreement is not yet in Buy.IU, include the original agreement in the Attachments section.
9. **Completing the Submission:** Within the “OVPGC Specific Questions” section, fill out the questions.
- g. Using the dropdown, select the campus of the requesting University unit; if you select Bloomington, Indianapolis, or University Administration (UA), an additional field will appear where you should add the name of the requesting University unit/department.
 - h. Indicate whether you are working with a specific attorney or paralegal. If so, select that attorney or paralegal from the dropdown field that appears.
 - i. In the next dropdown, indicate whether you have attached a contract and whether that contract uses an OVPGC template or not. If you indicate that you have attached a contract using an OVPGC template, then you will also need to indicate whether any substantive changes have been made to that template (e.g., any changes to the terms of the contract beyond dates, signatories, etc.).
 - j. Enter any additional information in the “Additional Information” box that might be helpful for our review.

- k. Click the “Next” button in the bottom right corner. If you have completed all of the sections of the Contract Request, you will see green checkmarks for each of those sections on the “Review and Complete” page.

Review and Complete Print Request | History | ?

✓ Required fields complete

Section	Progress
Instructions	✓ No Required fields
Details	✓ No Required fields
Attachments	✓ No Required fields
Questions	✓ Required fields complete

★ Required ◀ Previous Complete Request

- l. Click the “Complete Request” button in the bottom right corner. Click “Yes” at the “Confirm” page that asks, “Are you sure you are ready to complete your new contract request?” Your request has been submitted and will be routed to OVPGC for review.
10. **Checking the Status of a Contract Request:** To review your Contract Requests or check their status, go to the “Contracts” fly-out again, hover over “Requests” in the grey box, and select “**My Contract Requests**” in the white box.
- a. “**Request Status**” shows whether your request is “Incomplete” (i.e., you have not yet finished and submitted it), “Complete” (i.e., you have completed and submitted it, but it has not yet been approved), “Under Review” (your request has not yet been approved), or “Approved” (your request has been approved).

- b. You can also check status of an agreement by going back into your request after it has been “Approved” and click on the Contract Number on the request. It will take you to the agreement. You will also receive emails along the way and you will be notified when the agreement has been completed (executed).

