Contract Renewal Checklist
Version 4 (2021)

1. **Check for Existing/New Mandatory Contracts**- Contract Administrator to determine if there is a relevant statewide mandatory contract. If one is available, a waiver must be obtained in advance from the organization's Procurement Officer to proceed with the renewal.

2. **Verify Remaining Renewals**- Contract Administrator verifies that there is at least one valid renewal option available according to the contract terms. (Contracts normally have only four (4), one (1) year renewal options). If there are no renewal options available, the contract can be extended up to six (6) months with approval of the USO Agency Procurement Officer.

3. **Contract Assessment**- Contract Administrator completes a contract assessment report (SPD-CP019) and determines that the supplier's performance is satisfactory and has met the terms set forth in the contract. Contract assessment and renewal form can be located at http://doas.ga.gov/state-purchasing/seven-stages-of-procurement/stage-7-contract-process

4. **Tax Compliance**- If the renewal contract is $100,000.00 or greater, the Contract Administrator will have the supplier complete the Tax Compliance Form. The Contract Administrator will send the form to the Georgia Department of Revenue for tax compliance verification. The form must be approved by GDOR in order to proceed with renewal.

5. **Immigration and Security**- If the contract is service related, $2,500.00 or greater, and performed within the United States an Immigration Affidavit must be available and should be in the contract files.

6. **Certificate of Insurance**- If the service involves suppliers on our campuses, a certificate of insurance is required to be on file with Board or Regents of the University System of Georgia as the certificate holder. Insurance and Bonding guidelines can be located at http://doas.ga.gov/state-purchasing/seven-stages-of-procurement/stage-3-solicitation-preparation

7. **Cyber/Data Security**- The Contract Administrator shall review the cover sheet to determine if the contract involves a data security risk. If so, send contract to USG cybersecurity at cybersecurity@usg.edu for review. Review is to ensure that suppliers with access to USG data are adequately protecting that data.

8. **Contract Renewal Form-** If contract performance is satisfactory, the Contract Administrator exercises the contract renewal, and depending on the terms the contract may or may not require the supplier's written consent. If a supplier's consent is required, the Contract Administrator should allow ample time in case the supplier does not want to renew. If the contract does not specify a renewal date, it is recommended to initiate 60 days prior to expiration. The supplier must sign the form before submitting.

9. **Submit Purchase Requisition-** The purchasing department must verify there is sufficient funding to exercise the renewal, and a Purchase requisition is entered into eProcurement for the annual fund obligation. If no funds are required, the renewal will be submitted through contracts@usg.edu. Provide a clear description of the service, contract owner and date(s) of service. Submit purchase requisition through eProcurement, attach all supporting documents (such as renewal, assessment, insurance, immigration, tax compliance forms) as applicable. Include completed contract routing form.

10. **Budget Manager Review-** The requisition will be routed based on the chart fields to the appropriate budget manager. The Budget Manager reviews to ensure need still exists and funds are available. The Budget Manager approves or denies based on their review.

11. **Purchasing Review-** Purchasing department will review renewal and supporting documents for compliance. Will communicate issues or additional needs with the Requester and Budget Manager. If compliant with current USG/DOAS policy, purchasing department will forward to Legal for review.

12. **Legal Review-** Contract documents are forwarded to legal through Concord. Legal will review contract and work with department and contractor if edits or changes are needed. Once approved, legal will send it to the contract signatory authority. After execution contract is returned to purchasing department.

13. **Contract Distribution-** Contract is distributed to the Requester, supplier, and contract administrator. Contract Administrator will post all documents in PeopleSoft procurement contracts module. Sends contract and purchase order to originator for distribution to supplier.