



Instructions for Completing the *Contract Intake Form*

This form is used for submitting agreements to the Contracts Office for review and approval, prior to signature.

[[See information](#) regarding the proper processing and review of university contracts.]

Instructions:

Please fill out all applicable fields on this form. Below are some field descriptions. Fields with an *asterisk are required.

Initial Information

“Subject”: Enter a brief description of the agreement.

“Due Date”: The date by which the Contracts Office’s approval of the agreement is needed. This is different than the contract’s actual start date. Be sure to leave enough time between the Due Date and the contract start date to allow for obtaining contract signatures and collecting any additional necessary documentation (such as insurance certificates, where required). Also, depending on the situation, you may need to allow for extra time to contract with a different vendor should negotiations with the original Contractor fall through.

“Priority”:

1-Critical: This would be an emergency situation, where we need to very quickly move a contract through the approval process in order to avert either potential physical harm to people or property, or a major disruption to the proper performance of essential university functions.

2-Urgent: Expedited turnaround is requested.

3-Standard: There are at least 30 days remaining before the actual contract start date, and at least 2-3 weeks remaining before the Due Date.

4-Low: No particular Due Date has been established.

Section 1: Contract Administrator Information

“Contract Administrator”: The CWU employee responsible for monitoring and handling CWU’s obligations under the agreement.

Section 2: Contractor Information

Include the name of the Contractor (the person or entity that CWU wishes to enter into an agreement with), as well as the name and contact information of the individual who will be the main point of contact

on behalf of the Contractor (this would be the individual the Contracts Office should contact if any changes to the agreement are necessary)

Section 3: Contract Information

“Important Dates or Deadlines”: Include any dates the Contracts Office should be aware of, such as the contract start and end dates, any deadline for early contract submission incentives, etc.

Attaching agreement and other materials: Attach not only the agreement itself, but any related correspondence or other materials that would help facilitate review by the Contracts Office by, for instance, explaining the background and purpose of the agreement. It is preferable for the agreement to be attached as a Word document or in another editable format, in case the Contracts Office needs to make changes.

If using CWU’s Standard Agreement form, you can open the template from the Attachments tab. Fill it out as completely as possible. You may also submit an agreement utilizing another CWU approved contract template, or an agreement sent by the Contractor.

Final Steps

Once all required fields have been completed, and all necessary materials have been attached, you may submit the contract intake form.

Follow these steps:

- a. Save the contract intake form.
- b. Submit the form for review/approval.
- c. After submitting the form, retain the report sequence # for your reference. This sequence # can be used for viewing the contract status.

The form will then go through the approval routing process, ending with the Contracts Office. Existing approvers may add one or more additional approvers by clicking on the green “plus” button in between existing approvers’ names in the routing workflow. The Contracts Office will review the agreement last, and, once all necessary changes have been successfully negotiated, will approve the agreement for signature.

If you have any questions, contact the Contracts Office (cwu.contractsoffice@cwu.edu) or call 509-963-2324.

There is additional information ([FAQ's](#)) available on our CWU Contracts website.