

After you have preformed your due diligence and are ready to proceed with the procurement process with a vendor, the vendor may require the University to sign a contract. The University has a Technology Agreement template that will incorporate the NYS standard language, vendor pricing and applicable vendor terms and conditions.

This "how to" guide will walk you through the steps to create a draft agreement to provide to the vendor for their initial review.

### use this template for ...

- software applications
- software licenses
- databases
- subscriptions
- computers and technology hardware
- equipment with software components

## steps to follow ...

Prepare a draft agreement for the vendor to review

2

Provide draft agreement to vendor for their review and obtain required documents

3

Submit the vendor response to the contract workflow for review and approvals

#### documents needed ...

- <u>Technology Agreement template</u>
- NYS Exhibit A
- NYS Exhibit A-1 (\$25,000 and above)









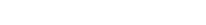
The <u>Technology template</u> is to be used for any technology purchases such as databases, software, subscriptions, hardware etc.

Complete the template by entering in the informa



#### PREPARE DRAFT AGREEMENT

7. Section 18. Notices



#### PREPARE DRAFT AGREEMENT

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2

Provide draft agreement to vendor for their review and obtain required documents

# PROVIDE THE FOLLOWING TO THE VENDOR FOR THEIR REVIEW

- 1. Draft agreement
- 2. NYS Exhibit A (pdf) can't be modified
- 3. NYS Exhibit A-1 (pdf) can't be modified, only applies if the total dollar amount of the agreement is \$75,000 or higher

# OBTAIN THE FOLLOWING FROM THE VENDOR

- Order Form, Quote, Statement of Work or Proposal that outlines the products and/or services, the terms and the pricing (MS Word format preferred) This will become Exhibit B.
- 2. MS Word version of their terms and conditions and any other documentation that is referenced in their terms that the University must agree to. This will become Exhibit C
- 3. Software documentation (as applicable)
  - a. <u>Higher Education Community</u>

    <u>Vendor Assessment Toolkit</u> For

    More information <u>click here</u>
  - b. <u>Voluntary Product Accessibility</u>
    <u>Template</u> For more information <u>click</u>
    here
  - c. SOC2 Report (if available)



3

Submit the vendor responses to the <u>contract workflow</u> for review, approvals and signatures.

## SUBMIT THE FOLLOWING INFORMATION TO THE CONTRACT WORKFLOW

- Draft agreement that has been reviewed / edited by the vendor
- Email from vendor with open issues/questions relating to contract or documentation requested (pdf format)
- Order Form, Quote, Statement of Work or Proposal that outlines the products and/or services, the terms and the pricing (MS Word format preferred)
- MS Word version of their terms and conditions and any other documentation that is referenced in their terms that the University must agree to.

- 5. Software documentation (as applicable)
  - a. <u>Higher Education Community Vendor</u>
    <u>Assessment Toolkit</u> For More information click here
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