

CONTRACTING AND PROCUREMENT SERVICES (CAPS) Contract Cover Sheet Procedures

The Contract Cover Sheet (Cover Sheet) is completed by the department submitting a contract for review and execution. "Contracts" include amendments to contracts, task orders, and work orders. CAPS requires the Cover Sheet for the following purposes:

- 1) Identify the business purpose of the proposed contract;
- 2) Obtain complete vendor information (legal business name, address, phone, and email);
- 3) Identify whether a solicitation is necessary;
- 4) If grant or sponsored project funds are utilized, obtain Sponsored Projects Administration verification that grant funds are available and authorized for the intended purchase or contract;
- 5) Obtain signature verification from the departmental fiscal authority certifying that the expenditure is authorized. If sponsored project funds are utilized it is the responsibility of the fiscal authority to certify that the signature under the Sponsored Project Approval signature section is accurate;
- 6) Screen for contracts requiring Office of Information Technology review. If OIT Review is required, departments must submit the [electronic IT Contract Review form](#) to OIT prior to submitting their Contract Cover Sheet to CAPS; and
- 7) Obtain verification that any PSU employee involved in the acquisition of goods or services contained in the contract does not have a conflict of interest as prohibited by PSU Ethics Policies and State of Oregon Ethics law.

The Cover Sheet is required for all grant and/or federally funded contracts as well as, all other contracts where PSU is purchasing goods or services except:

- a. Athletics contracts
- b. Office of International Affairs contracts
- c. Library database licenses
- d. Affiliation agreements for student internships
- e. Graduate School of Education student teaching agreements
- f. Capstone agreements
- g. Equipment donations or gifts to the University
- h. Hotel reservation contracts
- i. Bus transportation contracts
- j. Catering contracts with major hotels and restaurants
- k. Intergovernmental Agreements
- l. Purchases made under a State of Oregon or cooperative agreement.

The Cover Sheet is available on the CAPS web page:
<https://pdx.edu/purchasing-contracting/forms-documents>.

Once completed, please submit the Contract Cover Sheet form to contract@pdx.edu along with the contract. If OIT Review is required, please submit the electronic IT Contract Review form to OIT prior to submitting your Contract Cover Sheet to CAPS.

The electronic IT Contract Review form is available at:
<https://portlandstate.atlassian.net/servicedesk/customer/portal/2/create/75>.

Questions regarding the Cover Sheet, or other contract related questions, should be directed to CAPS by e-mail at contract@pdx.edu.