Total Contract Manager

- For Procurement Contracts -
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Office of the Controller

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Total Contract Manager (TCM) is a robust tool for creating, maintaining, and managing procurement contracts. Information about contracts can be tracked within TCM and contract documents managed as attachments. This contracting tool will assist Procurement Services and The Office of the General Counsel eliminate inefficient contract management practices and increase contract accessibility across the University.

Risk is reduced with the introduction of specific compliance questions developed through the involvement of certain University departments, including The Office of the Controller, Compliance, Office of Research & Economic Development, Department of IT, External Relations, Office of Finance and Budget, Environmental Health & Safety, and the Provost Office. Responses to these questions ensure that all the appropriate approvals are obtained automatically, thanks to TCM’s approval workflow process.

TCM’s collaborative environment also interfaces with an eSignature application, DocuSign, where University signatories and Suppliers can seamlessly execute their procurement contracts.
Learning Objectives

By utilizing this manual, TCM users will be able to:

- Efficiently search for existing Contracts within TCM.
- Correctly search for and identify a Supplier's Status in both TCM and PantherSoft Financials.
- Successfully enter a Contract into TCM, as well as accurately answer all Compliance Questions.
- Understand how each Compliance Question may impact the Contract Approval Workflow.
- Confidently identify Help Notes.
- Attach relevant documents to a Contract in an orderly manner.
- Recognize what actions initiate System Notifications.
- Accurately identify and explain TCM Contract Statuses.
- Easily send Contract Documents out for eSignature via the DocuSign Application.
**TCM Terminology**

**Action Items:** Appear above the flag in the upper right-hand corner of the screen. A signal that you need to take action in TCM for the contracting process to continue.

**Assign to Myself:** This locks the Contract form from other approvers while you are reviewing it.

**Check In:** This unlocks the contract – this should be done after you are finished reviewing the contract. After the contract is check in, other users with access to the contract will be able to edit it.

**Check Out:** This locks the contract during review so that users (other than the reviewer to whom it is checked out) cannot edit the contract. The contract will be displayed with a lock sign to other users to signify that the contract is checked out to another user and not available for editing.

**Competitive Solicitation:** A fair and open method of procuring goods and contractual services that serves to ensure transparency, best value, reduces the appearance and opportunity of favoritism, and inspires public confidence in the entire procurement process.

**Contract Execution:** A contract that, once fully approved at FIU, has signatures from all parties involved. This is an active contract as of the designated Start Date in TCM.

**DocuSign:** An application that provides electronic signature technology used to facilitate the electronic exchange of contracts and obtain eSignatures within TCM.

**eSignature:** This is used to avoid the manual signature process. FIU uses DocuSign to facilitate eSignature, which will take the user out of TCM to the DocuSign webpage. The user will be required to indicate where the signatories need to sign, date, initial etc, and DocuSign will send the contract to the first signatory and route it to the following signatory directly after the first signatory has signed.

**First Party:** At FIU, the First Party should always be FIU’s authorized signatory for the Procurement Contract.

**Fund Code:** Identifies major funding sources that the University must report on separately. Each fund has its own rules spending and receiving money.

**Master Agreement/Contract:** A document agreed between two parties that sets out standard terms that apply to all the transactions entered into between those parties. Each time that a transaction is entered into, the terms of the master agreement do not need to be re-negotiated and apply automatically.

**My Action Items** – Alerts users as to pending Action Items. These can also be found via the Flag icon within the top-right header pane.

**Notifications:** Appear above the bell in the upper right-hand corner of the screen or through an email. A signal that a Contract or contract that you have been involved in creating, approving or managing or will be responsible for approving or managing, has begun or completed a step in the contracting process. This does not always require your action.

**Quick Links** – Provides links to useful Procurement websites, documents, and other resources.

**Second Party:** The person or company with whom FIU is contracting. Also referred to throughout the handbook as vendor, Supplier or contractor. These terms are all synonymous.
TCM Roles

Each user has a designated role within TCM. Roles in TCM come with a set of permissions that allow users to complete the responsibilities of their designated role.

**Contract Manager**: User responsible for review, submission and administration of procurement contracts

**Contract Approver**: User responsible for approval of a designated workflow step for applicable procurement contracts.

**TCM Viewer**: User with view-only access to all TCM procurement contracts.

Requesting TCM Access

Should users require any of the aforementioned roles within Total Contract Manager (TCM), they may request this access be granted via the **Total Contract Manager Access Request Form**. This can be found via the following link: [go.fiu.edu/TCMAccessRequest](http://go.fiu.edu/TCMAccessRequest).

Users will need to log in via their FIU Username and Password.

Users' FIU Employee Information will automatically be populated. They can then proceed to select the appropriate Security Role required for TCM and submit.

The form will then be routed to the user's HR Supervisor for approval. Once approved, access will be granted.
Logging in to TCM


2. On the below screen, enter your FIU Username & Password, then click **Sign In**.

3. The Total Contract Management Dashboard appears.
If users find themselves on any screen beside the Dashboard upon login, they may access it via the **Contracts** icon within the left-hand navigation pane.
TCM Dashboard

All TCM users have access to a Contracts Dashboard, which provides quick access to key tasks and activities related to the management of contracts. These functions are specific to the user’s access and permissions.

At FIU, Contract Managers can find the contracts they oversee via the My Contracts pane. These include contracts in all statuses. (i.e. Draft, Out for Signature, etc.)

Additional panes will be discussed throughout this document, including the following:

**Contract Search** – Allows users to immediately search for contracts utilizing keywords.

**My Action Items** – Alerts users as to pending Action Items. These can also be found via the Flag icon within the top-right header pane.

**Quick Links** – Provides links to useful Procurement websites, documents, and other resources.
Contract Search

All TCM users have the ability to search through all University contracts within TCM. There are two ways to search:

**Simple Search** can be used when the user may not have that much specific information. The system will search all contract fields for keyword(s) entered, providing broad results.

**Advanced Search** can be used when the user has exact data or a complex set of values they are to search for. The system will only return results that are an exact match to the values entered.

1. Select the **Search Contracts** link via the **Contracts** icon within the left-hand navigation bar.

TCM defaults to **Advanced Search** criteria, with access to the **Simple Search** criteria via the link at the top-right corner of the screen.
2. Enter the desired criteria and click the Search button.

3. The Contract Search Results page will display all contracts that match the criteria entered. Results can be filtered, sorted, and refined utilizing the options to the top and right of this page.

4. Select the Contract Number (PUR-####) to pull up the contract. The specific actions available at this point will depend on the user's permissions.
Saved Searches

When users find themselves frequently utilizing the same search criteria, they may elect to save those search settings to use again. These are called Saved Searches.

Saved Searches can be created directly from the Contract Search Results screen.

1. Click the Save New Search button.

2. Enter a Nickname for the Saved Search. A Description is optional.
3. Every Saved Search must be saved in a folder. At FIU, Saved Searches should only be saved as **Personal**.

   Click the [Add New](#) link, then Top level personal folder to create a Personal folder.

4. Enter a **Name** and optional **Description** for the Saved Search folder.
5. Click the **Save Changes** button.

6. Complete the Saved Search by clicking the **Save** button.

7. The **Saved Search** name will now appear to the left of the **Contract Search Results**.
View and Manage Saved Searches

Saved Searches are viewed and managed in the View Saved Searches page. From there, users may:

- Run a Saved Search.
- Add Saved Search shortcuts to the Search Contracts page.
- Manage Saved Search folders.
- Add, edit, move, or delete Saved Searches.

1. Select the View Saved Searches link via the Contracts icon within the left-hand navigation bar.

2. Select the folder where the Saved Search is contained.

Users may elect to manage their Saved Search folders via the Folder Actions drop-down link.

The following actions are also available for the Saved Searches:

Add Shortcut or Remove Shortcut – Saved Search Shortcuts appear on the Search Contracts page.

Go – Runs the Saved Search and shows results on the Contract Search Results page.

Edit | Move | Copy | Delete – These take the corresponding action on the Saved Search.
Update a Saved Search

Saved Searches are created and updated from the Search Contracts page

1. Access and run the Saved Search.

2. Modify the parameters of the search within the **Refine Search Results** pane to the left of the **Contract Search Results**.

3. When the desired results are obtained, click the **Save Search** button.
The Contract Status indicates where a contract is in its lifecycle. These statuses can provide Contract Managers and Contract Approvers with the current state of contracts, including the following:

**Complete** – The contract has reached its scheduled end date and all steps required to close the contract have been done.

**Draft** – The contract’s attributes are being input and has not yet been submitted for approval.

**Expired** – When a contract has reached its scheduled end date, it is marked as expired.

**Executed: Future** – The contract is approved, but will not go into effect until its scheduled start date.

**Executed: In Effect** – The contract is approved and active.

**External Review** – The contract draft is complete and is undergoing an external review by individuals who do not have access to the system.

**Internal Review** – The contract is undergoing an internal review by users within the system.

**Out for Signature** – The Contract Manager has setup the document to collect eSignatures via the DocuSign application and the contract is in workflow to obtain these eSignatures.

**Pending Approval** – The contract is moving through its approval workflow.

**Pending Signature** – This applied to contracts that have obtained the appropriate workflow approvals and is ready to be setup for eSignature via DocuSign.

**Superseded** – The contract is an older version and is no longer in effect. It has been replaced with a newer version of the contract, whose status is ‘**Executed: In Effect**’.

**Terminated** – The contract has been stopped (terminated) before its scheduled end date.

These statuses can be identified via the Status Bar along the top of the Contract Header, alongside Contract Search Results, as well as some panes within the Dashboard.
Searching for Suppliers

Prior to entering a Contract into TCM, you should make sure the Supplier is available for selection within the system.

1. Select the **Search for a Supplier** link via the **Suppliers** icon within the left-hand navigation bar.

2. Enter the name of the **Supplier** or **Supplier ID** into the **Search** box, then click the **Go** button.

**NOTE:** The **Advanced Search** link provides additional fields to help users narrow down their search results.
3. For larger sets of results, users may find the Filter and Refine Supplier Search options useful. These are located on the left of the Results page.

4. Once the Supplier is confirmed within TCM, it is available for selection while entering the contract.

NOTE: If the Supplier cannot be found within TCM, users may check whether this is an approved Supplier within PantherSoft Financials via the following navigation:

Main Menu > Suppliers > Supplier Information > Add/Update > Review Suppliers

For assistance with PantherSoft Financials, contact Financial System and Support Services (FSSS) at 7-7200 or at controller@fiu.edu.

For assistance with registering a new Supplier, users may contact vendors@fiu.edu or direct the Supplier to the FIU Vendor Portal to complete the Supplier application.
Foreign Suppliers

Foreign suppliers will show as active within TCM, but remain unapproved until they go through an approval process with Tax Compliance. Contract Managers, however, may still create contracts with them in the system. Once this contract is fully approved and executed, Tax Compliance will approve the foreign supplier within PantherSoft Financials.

Although most of the contract creation process remains the same for foreign supplier, the following guidelines provide specifics on how to handle these types of vendors.

1. Enter the contract into TCM, per the steps provided in this manual. See Create a New Contract.
2. Ensure all documents are attached to TCM for Tax Compliance to review and approve during the workflow.
3. Add Tax Compliance as an additional signer after the Authorized FIU Signatory. See Additional Signers.
4. While setting up signatures in DocuSign, insert an “Initials” field for Tax Compliance on the signature page(s). See DocuSign eSignature Setup.

Tax Compliance will be the last party to initial, so they can review a fully executed contract and will be able to approve the foreign supplier in the PantherSoft Financials system.

Once this process is complete, the foreign supplier will be available for use on a requisition.
Creating a New Contract

The following will assist Contract Managers with the necessary steps in creating a procurement contract for goods and/or services on behalf of FIU. Submission of a procurement contract through TCM will automatically initiate an approval workflow based on responses to the Conflict of Interest questionnaire. These questions and subsequent approval requirements will be discussed in further detail throughout this guide.

Prior to entering any contract into TCM, users must first verify whether the Supplier is loaded into TCM.

Initiating a Contract

After confirming the Supplier is active and available for selection within TCM, the Contract Manager is ready to initiate a contract.

Return to the TCM Dashboard and locate the Quick Links widget.

1. The Create New Contract link can be located within the Quick Links widget.

The same link can be found through the Contracts icon within the left-hand navigation bar.
2. On Step 1 of the About the Contract screen, enter all required (*) fields:
   a. **Contract Name** – There is not a set naming convention for contracts, but the contract name should be clear and concise. It is also recommended it be easy to locate via the Contract Search functionalities.
   b. **Contract Type** – Drill down until ‘Purchase of Goods or Services’ is selected.
   c. **Project** – Leave this as the ‘Purchasing’ default.
   d. **Access and Visibility** – Leave the ‘Normal’ radial button selected. DO NOT select ‘Confidential’.

![Create Contract](image)

**NOTE:** Help notes are often available via the question mark symbol (●) and can provide guidance on business policies and processes.

3. With all required fields completed, select the **Next** button.

![Create Contract](image)
4. On Step 2 of the About the Contract screen, select the radial button for Upload My Own Contract. Then, select the Next button.

5. On Step 3 of the About the Contract screen, enter the Start Date and End Date (if necessary). These will come from the Supplier’s contract. Then, select the Create Contract button.

**NOTE:** Select the Update Start Date Upon Execution for the Start Date to update when the contract is signed by all parties. It is also possible to future-date the Start Date. For further guidance, see the Help Notes for these fields.
The Contract is now initiated and assigned a Contract Number (PUR-#####). Do not edit this number, as these are systematically assigned. This Contract Number will need to be TYPED at the top, right-hand corner of the first page for all attachments.

The questions on this page will require entry of information pertaining to the contract.

NOTE: Please save frequently via the Save Progress button located at the bottom of the page. The system automatically times out after 15 minutes, regardless of activity.
Contract Header

1. The **Contract Header** will contain information from the **About the Contract** entry screens, including the **Contract Name**, **Contract Type**, and **Project** fields.

2. If the user is entering documents such as addenda, order forms, scopes of work, etc., the user should link it to a Master Contract via the **Parent Contract** field. This is not intended to be used for renewals and/or amendments.
3. Select the Yes radial button for the **Use eSignature for this contract** question. This is required, as signatures will be collected via DocuSign.

![Contract Header Image]

4. A **Summary** is required for all contracts. This should describe the types of the goods and/or services being purchased including the name(s) of any individual(s) who will be performing the services and any other pertinent information.

   a. Begin by selecting the **Edit Summary** button. This will open the **Contract Summary** window.

![Contract Header Image]

![Contract Summary Image]
b. Once a description is entered in the **Contract Summary** window, select the **Done** button to return to the Contract.

![Contract Summary](image)

5. The **Contract Parties** are those entities or individuals who are responsible for performing as part of the contract.

**First Party:** By default, **The Florida International University Board of Trustees** will always be the ‘First Party (Primary)’ for every contract entered into TCM. A **Contact** will need to be entered. This individual will become the signatory for the contract. Users are responsible for knowing whom the assigned signatory is for their contract. When in doubt select the Director of Procurement Services, Kelly Loll.

   a. To add a Contact to the First Party, select the **Action** dropdown menu.

   ![Conact Parties](image)

   b. Select **Edit Contact**.

![Edit Contact](image)
c. The **Contact Information** window appears. Select a signatory (if available) from the **Choose a Contact** dropdown menu. If the desired contact is not available, select ‘Add Contact’ to enter their information in manually.

![Contact Information Window](image)


d. Confirm all information on the proceeding screen is correct. It is imperative that the signatory’s email is correct. This will be used later in the workflow for eSignatures. Click the **Save Changes** button.

![Contact Information Window](image)

**NOTE:** For a list of authorized signatories, visit the [Office of the General Counsel’s Signature Authority](#) website.

**Second Party:** This is also referred to as the **Supplier**. Once selected, a **Contact** will also need to be added. Like with the First Party, this individual will become the signatory

a. Begin by selecting the **Add Party** dropdown button.

![Contract Parties](image)
b. Select **Supplier Name**.

![Contract Parties](image)

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Contact</th>
<th>Contract Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Florida International University</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplier Name</td>
<td>First Party</td>
<td>(Primary)</td>
<td>Kelly Lion</td>
</tr>
<tr>
<td></td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

**NOTE:** Utilize key words within the search field to locate the Supplier.

![Select Primary Second Party](image)

Select the radial button for the desired Supplier, then click the **Select Contract Party** button.

![Select Primary Second Party](image)

**NOTE:** If the Supplier cannot be found within TCM, users may check whether this is an approved Supplier within PantherSoft Financials via the following navigation:

**Main Menu > Suppliers > Supplier Information > Add/Update > Review Suppliers**

For assistance with PantherSoft Financials, contact Financial System and Support Services (FSSS) at 7-7200 or at controller@fiu.edu.

For assistance with registering a new Supplier, users may contact vendors@fiu.edu or direct the Supplier to the [FIU Vendor Portal](https://www.fiu.edu/vendorportal) to complete the Supplier application.
e. Select a contact from the **Choose a Contact** dropdown menu. If one is not available, choose ‘Add Contact’. In this example, you will see how to add a contact. This individual does not need to be, but may become the Supplier’s signatory for this contract.

f. At minimum, enter the required fields (i.e. First Name and Last Name) for the Supplier’s contact. It is recommended to also add an Email, since this contact can be set up for eSignatures after contract approval(s). When complete, click the **Next** button.
g. If available, users may elect to select an address for the Supplier from the Choose An Address dropdown menu. This field is optional. Click the Done button.

6. The Dates & Renewals section will contain information from the About the Contract entry screens, which includes the Start & End Date fields.
7. If renewals are included within the terms of the Supplier’s contract, users must include those details in order to process those renewals through TCM in the future. For example, if the contract includes one renewal term of one year, the user should enter ‘1’ in the Number of Renewal Options field and ‘1 Year’ in the Renewal Term fields as shown below.

8. In the Contract Information section, select the Contract Completion Request Date by selecting the Calendar icon. This reflects the date the department would like for the contract to be fully executed by.

**NOTE:** Contract Managers should keep in mind that Contract Approvers have committed to approve contracts in their queue within two business days. If the contract requires review by the Office of the General Counsel, and additional 15 business days should be included in this date.
9. Enter the **Supplier Contact Name**, **Supplier Contact Email**, and **Supplier Contact Phone Number**. This contact does not need to be the same as the signatory for the Supplier.

![Contract Information](image)

10. Users may elect to utilize the **Additional Contract #** field, where they may enter an internal contract number as a reference, such as one provided by the Supplier.

![Contract Information](image)
11. The **FIU Information** section focuses on the cost of the contract and how the user’s department intends on fulfilling this financial obligation, including Chartfields that will later be used for accounting and reporting purposes.

Begin by specifying the **Method of Payment**. If a **Requisition** is used, it must be fully approved prior to entering the contract into TCM.

12. Specify the **Source of Funds**. This is identified by the **Fund Code** associated with the department’s budget.
13. Enter the **Total Cost of Contract** (including renewals).

![FIU Information form]

**NOTE:** If the amount entered is $75,000 or more, the method of procurement must be identified. For additional guidance on answering this question, refer to [BOG Regulation 18.001](#) or FIU’s [Procurement Services Manual](#). Please attach required approvals, as applicable. Sole Source purchases should be allowed an additional 15 days for all appropriate approvals.

![Total Cost of Contract form]

Any contract over $75,000 should be discussed with Procurement Services first. If a contract over this amount is submitted without prior approval, the contract will be sent back. Contract Managers should not decide whether the exemption applies to themselves. They should FIRST email [contracts@fiu.edu](mailto:contracts@fiu.edu).

For all contracts over $100,000 a letter/memorandum describing the Who, What, Where, When, Why attributes of the contract should be included in the Attachments.

For all contracts over $1,000,000, the Presidential Approval Form found in the Appendices section of this manual must also be included in the Attachments.
14. If applicable, enter the Activity or Project ID and Cost PID utilized for this contract. Users will be required to select their Department/Unit ID from the dropdown menu.

15. Identify whether or not the Academic Unit reports to the Provost.

16. Select the Category/Classification that best describes the line of goods/services being procured by this contract.

17. Enter the Competitive Solicitation # here, if any, and the associated Competitive Solicitation Title.
Contract Compliance Questions

All contracts entered into TCM will require the user’s responses to a series of Compliance Questions. These will determine whether contract approvals should route to specific compliance groups (i.e. IT and OGC) based on the nature of the goods/services involved. No additional approvals will be required outside of the TCM system. When in doubt, Contract Managers should reach out to OGC for further guidance at 7-2103.

Conflict of Interest

Select all checkboxes that apply, identifying whether any of these types of individuals (including spouses and/or children) whom may have a material (direct or indirect) interest in the Supplier.

![Conflict of Interest](image)

NOTE: Material interest means direct or indirect ownership of more than 5 percent of the total assets or capital stock of any business entity. Indirect ownership does not include ownership by a spouse or minor child; it only pertains to the employee’s indirect ownership.

The Contract Manager will not be able to continue with the contract process if there is a potential conflict of interest until it has been approved by the appropriate approver. As public employees, we are required by law to avoid conflicts of interest.

Tax Compliance

Identify whether the Supplier is a foreign entity or a non-resident individual.

![Tax Compliance Questions](image)

NOTE: Suppliers which are non-US Suppliers are considered “Foreign Suppliers”. If this applies to the Supplier, select ‘Yes’. This will route the contract to Tax Compliance for approval as part of the contract’s workflow. Tax Compliance will then work with the Contract Manager and the Foreign Supplier as needed to approve the contract.

After the contract has been executed and payment needs to be issued to the Foreign Supplier, the Contract Manager must contact Tax Compliance to have the Supplier approved within PantherSoft Financials. Approval of the contract IS NOT the same as approval of the Foreign Supplier in PantherSoft. The contract must be approved, processed, and executed before the Foreign Supplier can be approved as a Supplier in PantherSoft Financials. Should the Contract Manager require additional support, an email should be sent to tax@fiu.edu.
Information Technology Questionnaire

The IT Questions include a set of conditional questions that require specific feedback based on the Contract Manager’s response(s). Answers to these questions will determine whether approval from The Department of IT is required as part of TCM’s automated workflow.

1. Identify whether the contract is for the purchase of any IT software, hardware, IT contractual services, or new facilities (on or off campus).
   a. If the response to this question is “No”, the user may proceed to the Office of Research.
   b. If the response to this question is “Yes”, the user MUST complete the IT Questionnaire.

   **NOTE:** For further assistance with the IT Questionnaire contact Jessica Elliott, Executive Assistant to the CIO/VP of Information Technology at Jessica.Elliott1@fiu.edu.
2. Identify whether this contract is for **Hardware, Software, or Services and/or Consulting**.

   ![IT Questionnaire Diagram]

   Based on the user’s response to the aforementioned question, a selection must be made to the proceeding question. IF this question does not apply, due to **Software** not selected, select "**N/A**".

3. Identify the primary users of the IT product/service.

   ![c. Who are the users of this product/service? Diagram]

   - [ ] Students
   - [x] Staff
   - [ ] Other
   - [ ] Faculty
   - [x] Admins
4. Specify whether the product/service will be hosted off campus with IT Questionnaire (d). Responses to (e), (f), (g), and (h) will depend on the user’s response to this question.

   a. If the response is “Yes” to the product/service being hosted off campus, the user must proceed to respond with either “Yes” or “No” to question (e). This will identify whether the product/service can support **Federated Single Sign-on capabilities**.
If “Yes” is selected for (e), a response will also be required for (f). Here the user must describe any limitations or requirements regarding **Federated Single Sign-on capabilities**.

b. If the response to (d) is “No” to the product/service being hosted off campus, the user should select “N/A” to (e).
Then, the user may proceed to respond to question (g).

If “Hosted on Division of IT servers” was selected for (g), the user must respond either “Yes” or “No” to (h). This confirmed whether a quote was received from IT for hosting.
5. If the IT product requires integration with other FIU platforms, select “Yes” for question (i) and provide a description of this integration in the box provided under (j).

If the response to question (i) is “No” or “N/A” proceed to question (k).

6. Identify the group responsible for installing, administering, and keeping the application patched via the dropdown menu for question (k). Subsequent responses to questions (l) and (m) will depend on the user’s response to this.
a. If the response to (k) is “Division of IT Staff”, the user must respond to question (l) with either “Yes” or “No” to identify whether pricing for the administrative services was obtained from the Division of IT. The user may then proceed to question (n).

The user will then be expected to select “N/A” for question (m).

b. If the response to (k) is “Internal Departmental IT Staff”, the user will be expected to select “N/A” in response to question (l).
A response of either “Yes” or “No” will need to be selected for question (m), identifying whether a new server will need to be purchased for the Department.

c. If the response to (k) is either “Vendor”, “N/A”, or “Other”, the user is expected to select “N/A” for both questions (l) and (m), then proceed to question (n).

7. A response is not required for IT Question (n) on this screen. However, Contract Managers are expected to attach the 5 Year Cost Analysis within the attachments section of TCM with a copy of the Supplier’s contract.
Contract Managers must identify whether their Supplier will be paid by **Sponsored Research funds**. Responses to these questions will determine whether approval from The Office of Research and Economic Development is required as part of TCM’s automated workflow.

If the response to this question is “**No**” then proceed to the **Environment Health & Safety Question**.

If the response to this question is “**Yes**”, additional questions will need to be answered.

1. Identify whether this contract is for a **hotel room or conference room reservation**.

2. Identify whether this contract is for a **real estate lease**.
Environmental Health & Safety (EHS)

This question identifies whether the product/services purchased as part of this contract involves **hazardous substances/equipment**. If so, select "Yes". The response to this question will determine whether approval from The Office of Environmental Health & Safety is required as part of TCM’s automated workflow.

This includes, but is not limited to, substances/equipment pertaining to the following:

- Lasers
- Chemicals
- Biologics
- Controlled Substances
- Nanomaterials
- X-Rays
- Radioactive Materials
- Select Agents

If assistance determining whether the purchase requires EH&S approval, please contact EH&S at ehs@fiu.edu, with the Subject: “Purchase Pre-Approval Inquiry” or reference the EH&S Website.

If it is determined that the aforementioned does not apply to this contract, select "No" and proceed to the Merchant Accounts Questions.

Merchant Account

The question(s) within this section pertain to the transmittal and storage of sensitive payment (e.g. credit card) information and the security and compliance requirements that are required. The responses to these questions will determine whether approval from The Payment Card Industry Data Security Standard (PCI-DSS) Compliance Team is required as part of TCM’s automated workflow.

Contract Managers must first identify whether the Supplier will “**process, store, and/or transmit credit card information on behalf of the University for goods and/or services**.”

If the response to this question is “No”, proceed to the External Relations Question.
If the response to this question is “Yes”, additional questions will need to be answered.

1. Identify whether the Supplier’s goods/services will impact **FIU’s Network Security**. This includes whether they will need to be logged into FIU’s WiFi network in order to process credit card transactions via a mobile reader or directly entering the cardholder information into a web-based application.
2. Identify whether FIU employees will have access to credit card information. This includes the full payment card number and/or have the ability to process credit card payments.

3. Identify whether the Supplier is a fully outsourced service provider. This may be a business entity that is directly involved in the processing, storage, or transmission of cardholder data.

4. No response is required for this question; however, the Supplier’s Attestation of Compliance (AOC) or proof that they are listed on Visa’s Global Registry of Service Providers must be attached along with the Supplier’s agreement within the Attachment section of this Contract.

5. No response is required for this question; however, a detailed schematic of payment card data flow must be attached along with the Supplier’s agreement.
External Relations

Identify whether the Supplier’s contract allows them to utilize FIU’s name and/or logo.

If the response to this question is “No”, proceed to the Financing question.

If the response to this question is “Yes”, the contract will be routed to External Relations for approval via the TCM automated workflow.

Financing

Identify whether the contract is for the lease or finance of equipment, including software, which would incur a liability to the University.

If the response to this question is “No”, proceed to the Export Controls question.

If the response to this question is “Yes”, the contract will be routed to The Office of the Treasurer for approval via the TCM automated workflow.

NOTE: Consider whether this contract involves installment payments. These are a series of future payments that a purchaser agrees to make to compensate a seller.

For additional assistance contact Benjamin Powell Jarrell, Senior Treasury Analyst at jarrell@fiu.edu.
Export Controls

Identify whether the goods purchased are subject to export controls.

If the Supplier advises that the goods are export controlled or contains an Export Control Classification Number (ECCN) or an International Traffic in Arms Regulation (ITAR) Classification, or if the contract contains any terms or conditions that provide information on export control regulations, contact FIU’s Office of University Compliance and Integrity at (305)348-2216.

If the response to this question is “No”, proceed to the HIPPA question.

If the response to this question is “Yes”, the contract will be routed to The Office of University Compliance and Integrity for approval via the TCM automated workflow.

NOTE: For additional details and resources on the classifications of export controls, review the Help Note alongside the Export Control question in TCM.
HIPPA

Identify whether the Supplier will have access to any personally protected health information involving FIU’s staff or the public in general.

Personal Health Information (PHI) generally refers to demographic information, medical history, test and laboratory results, insurance information, and other data that healthcare professionals collect to identify an individual and determine appropriate care.

HIPPA rules require that FIU, as a Hybrid entity, must enter into a business associate agreement (separate from the contract) with any such Supplier of goods or services who will have access to PHI in order to ensure that the Supplier will appropriately safeguard such PHI.

If the response to this question is “No”, proceed to the Lease of Space question.

If the response to this question is “Yes”, the contract will be routed to The Office of University Compliance and Integrity for approval via the TCM automated workflow.

Contact Val Aubourg, FIU’s Associate General Counsel, at vaubourg@fiu.edu, for additional assistance.
Lease of Space

Identify whether the contract is for the lease of space, whether it be commercial or residential.

If the response to this question is "No", proceed to the FERPA question.

If the response to this question is “Yes”, specify whether the space is less than 5,000 square feet.

NOTE: If the lease is for space over 5,000 square feet, a competitive solicitation is required. The contract cannot be processed until this requirement is satisfied.

Contact Chandra Nix, Procurement Manager, at nixo@fiu.edu for additional assistance.
Identify whether the Supplier will have access to Personally Identifiable Information (PII), student education records or student financial information.

If the response to this question is “No”, proceed to the Red Flag question.

If the response to this question is “Yes”, additional questions will need to be answered. Responses to these will determine routing of the contract to The Office of the General Council for approval via the TCM automated workflow.
Select the reason that FIU will need to provide the Supplier with such information.

**NOTE:** Refer to FIU’s Student Education Records information packet for more information.
a. Education records that have been designed as “Directory Information” by FIU may be disclosed without prior consent.

If this selection is made, select either “Yes” or “No” from the dropdown menu in the proceeding question. This will identify whether the student(s) notified the school in writing that he or she does not want any or all of the information considered to be “Directory Information” to actually be designated as such.

NOTE: FIU is required to honor the eligible student’s request, even if the student is no longer in attendance. For more information, refer to the Help Note alongside these questions in TCM.
b. If FIU is outsourcing institutional services or functions to the Supplier, the Supplier may be considered a “school official”. This is the case if the institutional service or function they are performing is on which FIU would otherwise use employees to perform, and the Supplier is under the direct control of FIU with respect to the use and maintenance of educational records.

If this selection is made, the user may select “N/A” from the dropdown menu for the proceeding question.

**NOTE:** Additional requirements for Suppliers acting as “school officials” can be found in the Help Notes alongside this question in TCM.
c. All other selections available for the reason that FIU will need to provide the Supplier with such information may require the user to select “N/A” from the dropdown menu for the proceeding question.
Red Flag

Identify whether the Supplier will have access to the social security numbers of employees and/or students. If the response is “No”, proceed to the next step in the contract creation process. If the response is “Yes”, the contract will be routed to The Office of University Compliance and Integrity for approval via the TCM automated workflow.

NOTE: The particular purpose for the use of Social Security Numbers must fall within one of the stated purposes found on the FIU Master List for Use & Collection of Social Security Number.
Contract Attachments

After completing all required fields for the **Contract Header** and **Contract Compliance Questions**, locate the **Attachments** section of the contract to upload the Supplier’s agreement into TCM.

**NOTE:** The first page of all documents attached to the contract within TCM should have the PUR # typed within the top, right-hand corner. This number should not be hand-written.

1. Click the **Attachments** link on the left-hand side of the page. The number located alongside this link identifies the number of attachments currently associated to the contract.

2. Click the **Add Attachments** button.
a. Utilize the **Select Files** button to locate the Supplier’s agreement.

![Select Files](image1)

b. Once selected, the agreement will appear within the **Files** grey box.

![Select Files](image2)

c. For the **Print with Full Contract** field, select the **Yes** radial button to have the attachment included with the contract when DocuSigned. Select the **No** radial button to omit the attachment when DocuSigned.

![Select Files](image3)
d. Leave the default selection for the **Contract Summary Visibility** field.

![Add Attachments dialog box](image)

e. Select the **Save Changes** button. This will return the user back to the main **Attachments** page, where the attached agreement now shows.

![Attachments page](image)
Attachment Actions

- **Edit Properties**
  When selected, this action allows users to edit properties set at the time the attachment was uploaded into TCM. For more information on these settings, review the Contract Attachments section of this document.

- **Download**
  This action allows users to download the available copy of the attachment. If this document has been signed, signatures will be included in the downloaded copy.

- **Upload New Version**
  This replaces the existing version of the attachment and identifies the Version number on the attachment’s line.

- **Set a Main Document**
  When working with multiple documents within the same contract, this action allows users to assign a Main Document. This may be most frequently used with addenda, amendments, extensions, or renewals.

- **Delete**
  This selection will remove the attachment from the contract.
Assigning First and Second Party Signers for eSignatures

Prior to submission, Signers must be assigned through the eSignature section.

Once the contract is fully approved, Contract Managers may return to the contract in TCM and launch the eSignature application – DocuSign. This will allow them to obtain signatures from the assigned Signers. It will be the Contract Manager’s responsibility to obtain the supplier’s signature.

1. Click the eSignature link on the left-hand side of the page. The number located alongside this link identifies the number of Signers currently associated to the contract.

2. The default Settings for eSignatures should not be changed. Once the contract is approved, the Contract Manager will utilize the DocuSign interface to assign fields to the appropriate Signers.
3. Click the **Add Signer** button.

![Add Signer button](image)

4. The options available for selection within the **Contract Party** and **Choose a Contact** dropdown menus are based on the parties and contacts entered in the contract **Header**.

   Open the **Contract Party** dropdown and select the **Supplier**, listed under “**Second Parties**.

![Contract Party dropdown](image)

**NOTE:** Although FIU is the “**First Party**”, the Supplier should always be selected as the first **Signer**. At the time of execution, signatures will be obtained from the Supplier prior to the assigned signatory at FIU. This is why they are selected first here. The reason that we have the Supplier sign first is to make sure that the Supplier does not change any of the contract terms.

5. Open the **Choose a Contact** dropdown and select the signer from the list of available contacts.

![Choose a Contact](image)
If the desired signer is not listed, the Contract Manager may select **Manually Enter Signer**.

Any new contacts added at this phase MUST have a unique email where the eSignature notification can be sent. This will also allow DocuSign to create and/or recognize a profile for authentication and tracking purposes.

6. After affirming all Supplier contact fields are correct, select the **Save Changes** button.
7. The Supplier and corresponding signatory will now be visible as the first **Signer**

![Signers Table]

8. Steps 3 through 6 will need to be repeated for FIU’s (**First Party**) signatory.

While selecting the **Contract Party** and **Contact** an additional dropdown menu is available, designating the **Signing Order**. This should only be used to guarantee the appropriate **Signer** order as discussed in the note found within step 4 of this section.

![Add Signer]

**NOTE:** For a list of authorized signatories, visit the [Office of the General Counsel’s Signature Authority](#) website.

9. When complete, the **Signers** will appear in the order shown below, with the Supplier always signing the contract before FIU.

![Signers Table]

10. Select the **Next** button at the bottom of the page and proceed to submit the contract for approval.
Additional Signers

For certain Contracts, additional initials and/or signatures may be required. Examples of these situations include:

- Contracts over $100,000
- Contracts over $1,000,000
- Contracts with foreign suppliers

1. Complete all steps as noted in the Assigning First and Second Party Signers section of this manual.

2. Click the Add Signer button.

3. Select the appropriate Contract Party and Contact. An additional dropdown menu labelled Signing Order will be available.

In this example, this contract must also be initialed by Dr. Kenneth Jessell. This is the case for non-academic contracts over $100,000, when he must initial the contract prior to the FIU Signatory.

<table>
<thead>
<tr>
<th>Signing Order</th>
<th>Name</th>
<th>Email</th>
<th>Title</th>
<th>Contract Party</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Susie</td>
<td><a href="mailto:susie@supplier.com">susie@supplier.com</a></td>
<td>-</td>
<td>TRAINING SOLUTIONS INC</td>
</tr>
<tr>
<td>2</td>
<td>Kelly</td>
<td><a href="mailto:cherrera@fiu.edu">cherrera@fiu.edu</a></td>
<td>Director of Purchasing</td>
<td>The Florida International University Board of Trustees</td>
</tr>
<tr>
<td>3</td>
<td>Kenneth</td>
<td><a href="mailto:cherrera@fiu.edu">cherrera@fiu.edu</a></td>
<td>Senior Vice President &amp; CFO</td>
<td>The Florida International University Board of Trustees</td>
</tr>
</tbody>
</table>

The signers now appear in the order designated, such as what is shown below.
Submitting for Approval & Approval Workflow

Once a contract in Draft status is complete, the user can submit it via the Submit for Approval screen. This can be accessed via Submit for Approval link on the left-hand side of the page.

This page will validate whether all required fields in all sections of the contract are complete. If any information is missing from these fields, TCM will provide a message indicating incomplete sections exists. It will also mark the Progress column as “Incomplete” and provide a detailed alert on the alongside the section where the field is located.

If all fields are complete, a message will indicate all sections are complete, including the Progress column showing section statuses of “Required Fields Complete”.

---

**Submit for Approval**

- **Header**
  - Progress: Incomplete
  - Action Needed: Please select any of the following persons (including their spouse and/or child) who may have a material (direct or indirect) interest in the Supplier:
    - Source of Funds
    - Supplier Contact Phone Number

- **Attachments**
  - Progress: Required Fields Complete

- **Review Rounds**
  - Progress: Required Fields Complete

- **eSignature**
  - Progress: Required Fields Complete

**Submit for Approval**

- All sections are complete. You may submit your contract for approval.

**Submit for Approval**

- **Header**
  - Progress: Required Fields Complete
- **Attachments**
  - Progress: Required Fields Complete
- **Review Rounds**
  - Progress: Required Fields Complete
- **eSignature**
  - Progress: Required Fields Complete
In order to review the approvals required for the contract being submitted, the Contract Manager should expand the **View Approval Steps** section. The approval workflow diagram will appear and includes all of the potential approvals in the order the Contract will be routed.

**NOTE:** Approval workflow steps are dependent on the attributes of the Contract and the responses to the **Compliance Questions**.

Individual Contract Approvers can be identified by selecting any of the [view approvers] links.

This will open the **Workflow Step Approvers** popup window, identifying the name(s), phone number(s) and email address(es) for the Contract Approver(s) responsible for approving at that step.

**NOTE:** Contract Approvers have committed to a two-business-day approval timeframe. If the approver determines that it will take more than the two business days, he/she has agreed to advise the Contract Manager to expect a delay and provide an estimated time when the decision to approve or deny will be made. Unless otherwise required, please refrain from contacting approvers for status updates until this timeframe has elapsed. Depending on review requirements, this timeframe may be adjusted as needed.

Once complete, the contract can be submitted for approval via the **Submit for Approval** button located at the bottom of the screen.
Contract Managers will then be presented with an **Approval Details** window, where they should enter a message for approvers to see. When done, select the **Submit for Approval** button.

![Approval Details Window](image)

**NOTE:** If the Contract is over $100,000, include specific information on Who, What, Where, and When within this box.

The Contract Manager has now completed the Contract’s submission and it is now routed according to the approval workflow.

![Contract Submitted for Approval](image)

The status of the Contract will reflect as **Pending Approval**.

![Pending Approval](image)

Notifications will be sent to the Contract Approver(s) as the Contract progresses through workflow.
Contract Approvals

Once a Contract is submitted, TCM routes it through an approval workflow. The required approvals are based on the request’s attributes and information entered into the system by the Contract Manager. As the Contract progresses through the workflow, TCM informs the Contract Approver via automated emails and system notifications that their approval is required.

In order to review the Contract pending their approval, Contract Approvers may utilize the View Contract button within the notification email they received.

Contract Approvers may also log directly into TCM and find an alert under the Notification icon to the top-right of their Dashboard.

Both of these methods will take the Contract Approver directly to the Contract pending their review and approval.
Approving Contracts

Once accessed, the Contract Approver will be able to review the Contract currently in **Pending Approval** status.

The Contract can be approved via the **Approve** link within the **Contract Actions** dropdown menu.

**NOTE:** The available options available within the **Contract Actions** menu will vary based on the user’s role (i.e. Contract Manager vs Contract Approver) and the status of the Contract.
The Contract will move on to the next step within the approval workflow. When it is fully approved, the Contract Manager will receive notifications advising that the Contract is now ready for eSignatures via DocuSign.

Dear Luis Aguilar,

This email is to inform you that the Roary's Training Services contract, PUR-00120, has been sent to DocuSign. The contract is ready for placeholders and/or to be sent to the contract signers.

Use the link below to access the contract within the application as appropriate.

View Contract

and select Launch ESignature from the Contract Actions menu.

Thank You,

FIU Procurement Services Contract Team
Obtaining eSignatures via DocuSign

Once the contract has been completely approved, the Contract Manager may obtain all necessary eSignatures via the DocuSign application. Documents within DocuSign can be reviewed by all parties, independent of TCM.

DocuSign eSignature Setup

1. Access the DocuSign application via the Launch eSignature link within the Contract Actions dropdown menu.

This will launch DocuSign in a new tab or window.
2. Utilize the available options under **Standard Fields** to click, drag, and drop the items you want the Signer to fill in (e.g. Signature, Date Signed, Name, etc.).

**NOTE:** For Contracts over $1,000,000, needing President Mark B. Rosenberg’s signature, **Initial** fields for either FIU’s CFO, Dr. Kenneth Jessell for non-academic purchases, or FIU’s Provost, Dr. Kenneth Furton for academic purchases, will need to be included on the signature page. This is because either Dr. Jessell or Dr. Furton will have to be included in the signing process. Their initials on the Contract are a signal to the President that they have reviewed and approved the Contract.
3. To change the Signer for which the fields apply, utilize the dropdown menu located about the **Standard Fields**. Repeat the actions in step 2 until all fields are applied for all Signers.

![Dropdown menu for changing Signers](image)

4. Once all necessary fields have been assigned to the document, click the **Send** button located at the top-right of the DocuSign screen.

![Send button in DocuSign](image)

5. Once sent, DocuSign will display **Waiting for Others** as the status of the document.

![DocuSign status](image)

6. Email notifications will be sent to all Signers, in the order specified at the time of eSignature setup within TCM.

![Email notification](image)
Signing Documents via DocuSign

1. Signers can access the document requiring signature via the **Review Document** button within the DocuSign notification email.

2. Review the **Electronic Record and Signature Disclosure** and select the 'I agree to use electronic records and signatures' checkbox.

3. Click the **Continue** button.
4. Click the Start button to be directed to areas requiring initials, signatures, dates, or any other entry by the Signer.

5. Click the Sign option.

NOTE: Other fields may require manual selection or entry, depending on their nature.

6. Choose a signature style or elect to draw a signature, then click the Adopt and Sign button.
7. When all fields are completed, click the **Finish** button.

<table>
<thead>
<tr>
<th>First Party Signature</th>
<th>Supplier Signature</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Susie Supplier</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Print Name</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Print Name</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/25/2017</td>
<td></td>
</tr>
</tbody>
</table>

[FINISH button]
Checking the Status of eSignatures

Once contract documents are sent out for eSignature via DocuSign, the status of these can be tracked via TCM.

1. Access the contract and navigate to the eSignature link on the left-hand side of the page.

2. Users can check the status of eSignatures via the Status and Tracking column for each Signer.

eSignature Statuses include the following:

**Created**: eSignatures were setup within DocuSign and the document(s) has not yet been sent.

**Sent**: The document(s) has been sent to the Signer for eSignature.

**Completed**: The Signer has eSigned the document(s).
The Presidential Approval Form

The below Presidential Approval Form must be completed for any Contracts over $1,000,000 and can be obtained from Procurement Services.

---

**PRESIDENTIAL APPROVAL FORM**

To be the cover sheet to any and all contracts, University messages, letters and any document(s) requiring the President’s signature and/or approval

DATE:

INITIATING DEPARTMENT:

CONTACT PERSON:

EXTENSION: FAX: EMAIL:

NUMBER OF ITEMS: DATE NEEDED:

DOCUMENT DESCRIPTION:

I have reviewed and approved the attached document(s) for the President’s signature and/or approval. I accept full responsibility should there be any error in the content, syntax, or form of the document. I am responsible for the editing and/or reformatting of this document if any changes are needed.

I understand that the President and/or his designee will retain the right to review any document that he/she chooses, and to request changes where deemed appropriate.

INITIATOR SIGNATURE: ____________________ DATE: ________________

APPROVED BY VICE PRESIDENT: ____________________ DATE: ________________

APPROVED BY DEAN (WHEN APPLICABLE): ____________________ DATE: ________________

Once this request has been approved, your office will be notified that the document(s) are ready for retrieval.

OOP USE ONLY

APPROVAL: ____________________ DATE: ________________

This form should be duplicated for further use.

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Florida International University · Office of the President
Modesto A. Maidique Campus · Miami, FL 33199
Phone (305) 348-2111 · Fax (305) 348-3660