UNIVERSITY OF ILLINOIS

URBANA-CHAMPAIGN · CHICAGO · SPRINGFIELD

Contracts 101: Urbana Contract Basics – Webinar Questions and Answers

1. Q: What was the contact email for questions?
   A: If you have any questions regarding the content of the webinar, please email UrbanaCSO@uillinois.edu.

2. Q: Once I have signed a contract, how do I generate a requisition?
   A: For questions regarding procurement contracts, please contact Urbana Purchasing at UrbanaPurchasing@uillinois.edu.

3. Q: CARF = iCS? So the CARF is no longer for those that have access to iCS, correct?
   A: If you are using iCS to route your contracts, you do not need to complete a CARF because you will be entering that information directly into the system.

4. Q: What is the approval process for hotel room blocks for lodging that the individual making the reservations reserves and pays for (not the University)?
   A: These agreements are handled in Urbana Purchasing. Please contact them at UrbanaPurchasing@uillinois.edu for additional information.

5. Q: What is the difference between a purchase order and a contract?
   A: For questions regarding procurement contracts, please contact Urbana Purchasing at UrbanaPurchasing@uillinois.edu.

6. Q: How does the routing work in iCS and should we initiate contracts in iCS?
   A: If your unit is live in iCS, you should initiate and route your contracts within the system. You obtain approvals in the system, rather than collecting physical signatures on a CARF. For additional information about iCS, please visit the iCS Resource Page at https://www.obfs.uillinois.edu/ics-resources.

7. Q: What is the path for obtaining AVP approval for signing a custom contract?
   A: If you have a custom contract and wish to obtain signature authority approval from the AVP, please contact UrbanaCSO@uillinois.edu. We will be able to provide you with step-by-step instructions.

8. Q: Hanna mentioned MOUs need to be routed through iCS but then indicated that intra-University MOUs don't require OBFS review. Could you please clarify if intra-University MOUs should be entered into iCS?
   A: Intra-university agreements (sometime called MOUs, but meaning any type of agreement between two university units/departments), do not require OBFS review and should not be entered or stored in iCS.

9. Q: Will you have a webinar on how to use iCS since new people come on board?

A: The iCS Training Group is currently discussing the future of iCS training as we are at the end of our scheduled campus deployments. We will communicate any changes as they become available.

10. Q: Do MOUs for international arrangements need to be routed through iCS?

A: Yes. MOUs for international arrangements contain language that binds the University and that language should be reviewed by CSO.

11. Q: What is the difference between technical testing agreements and revenue generating agreements?

A: Please see OBFS Policies and Procedures, Section 16.4.2 for the specific definition of technical testing. We understand that this is a very gray area and often struggle internally to define these situations. It often requires discussion between CSO and the Office of Sponsored Programs (OSP) on a case-by-case basis to determine whether something is technical testing or revenue-generating services. While, unfortunately, we don't really have any clearer guidance on this topic right now, we are aware that this is an area in need of improvement (better definitions, clearer processes, etc.) and are thinking about potential changes to come.

12. Q: When do we use your office versus purchasing?

A: The short answer is that payable agreements most often go through Purchasing and others (generally, revenue-generating and zero dollar agreements) go through CSO. Of course, there are always exceptions that CSO and Purchasing work together to determine appropriate handling. In general, though, when initiating a payable agreement, we always recommend that units start with Urbana Purchasing.

13. Q: Do you have examples of cases that went wrong that we can provide to our faculty as lessons?

A: We don't generally share or publish the examples of things that went wrong. However, we certainly have some of that information internally. If you are looking for something that can be used in a specific scenario, for a specific audience within your unit or college, CSO would be more than happy to work with you and develop something you can use for that purpose. If the resources that are publicly available do not address your needs, we are always willing to create something custom that will better address your needs. Please contact UrbanaCSO@uillinois.edu to request a custom resource.

14. Q: Is it true that we now have to submit an invoice from the vendor when submitting a contract through TEM?

A: Any question relating to documentation required for payments made through TEM should start with University Payables. We work closely with them regarding transactions that are related to contracts that may go through our office. They also work closely with Urbana Purchasing staff for payments that may be associated with contracts that Purchasing has handled. More information about required documentation may be found on the TEM Resource Page.

15. Q: Any update on the data export of contracts and contract numbers from iCS? When will this option be available?

    A: This question is regarding the migration of iCS date to the Enterprise Data Warehouse (EDW). When will iCS data be available in the EDW? All of the pre-migration work is complete (needs assessment, etc.), but Decision Support has not given us a specific date for when the actual data migration will be performed yet. We will be sure to communicate any updates to all iCS users as soon as we receive them.

16. Q: I was asked if we could develop a fill in the blank contract for a sponsor for a competition. Is this possible or do we just use their documents and go through iCS?

    A: We need to know more information about the sponsor and competition and your specific situation. Please reach out to UrbanaCSO@uillinois.edu to discuss this question in greater detail.

17. Q: Once a custom template has been approved by legal for a department, can it be altered?

    A: Yes and no. It can be altered by an OBFS buyer or coordinator. It cannot be altered by an end user in a unit/department. All of the templates that receive an approval footer from University Counsel are locked for editing. There are cases where a contracting party requests a change to a standard template, which can be accommodated if appropriate. Those changes need to route to CSO or Urbana Purchasing for approval. The buyers and coordinators, as well as the attorneys in University Counsel, have the ability to unlock templates and make changes.

18. Q: Are all contracts required to go through iCS? Will old contracts be added?

    A: Not every unit or college at the University of Illinois will receive access to iCS, so they will not have the option to initiate and route their contracts in the system. All OBFS contract processing offices actively use the system. Any time a contract routes to CSO or Urbana Purchasing, the staff in those office are creating the contracts in the system. Regardless of where they start, all University contracts are being stored in the repository, which is now iCS. All contracts executed since May 2012 are stored in iCS. Certain types (such as employment contracts) are restricted to only high-level security roles like University Counsel and the Board of Trustees Office. Contracts executed prior to May 2012 are also restricted to certain security roles, including the University Contract Records Office (UCRO). If you need to access a contract that is not available to you in iCS, you should contact UCRO at ContractRecords@uillinois.edu.

19. Q: Can there be the option to query saved searches at a specific time instead of having to push a button?

    A: If your question is related specifically to searching in iCS, there is a way to save a search in iCS so that you can access the elements of that search without having to build it over again. Please refer to the iCS Resource Page, or contact UrbanaCSO@uillinois.edu for step-by-step instructions.