

How to Complete the UIUC Contract Approval/Routing Form (CARF)

Last Updated June 4, 2014

Section 1 – Contract

Contract Category

A contract is either Payable (money out), No Funds (\$0), or Receivable (money in). Select the radio button next to the category that matches your contract.

New Contract


Select this radio button if you are routing a new contract (not an amendment).

Amendment

Select this radio button if you are routing an amendment to an existing contract. On the line following the # sign, type the number corresponding to the amendment (Type 1 for the first amendment, 2 for the second amendment, etc.)

Contract Type

Select the appropriate Contract Type from the drop-down menu. Your selection in this field informs the available Contract Subtypes in the following field.

Helpful Hint: double-click on the paperclip icon  for a list of Contract Type and Contract Subtype definitions.

Contract Subtype

Select the appropriate Contract Subtype from the drop-down menu. The selections available are informed by your Contract Type selection.

Brief Description

Please type a brief description (i.e., what is the contract about) of the contract you are routing.

Chart

Type the one-digit Chart that corresponds to your campus (1 = Urbana-Champaign, 2 = Chicago, 4 = Springfield, 9 = University Administration).

Org

Type the three-digit Organization Code that corresponds with your unit. If you are unsure of your Org Code, there is a list available on the OBFS Banner Alerts and Resources Page (provide link).

Amount

Enter the total amount of the contract you are routing. If the contract lists an amount of \$X/year and the contract is for five years, list the total of the entire contract duration (so the full five years' cost). If you are unsure of the exact amount, an estimate is fine. If your contract is no funds, then type \$0.

Start Date

Type the start date of your contract. If your contract indicates that it becomes effective upon execution, then an estimated date is acceptable, or you can type "upon execution" (CSO will modify this date, if needed, upon execution).

End Date

Type the date that your contract ends or expires.


of Renewals

Does your contract allow for renewal periods (extensions of the original term)? If so, type the maximum number of renewals permitted by the contract. If no renewals are permitted, then type 0.

Health Care Related?

Is the contract activity related to health care services? Possibly examples of this could be student externships (affiliation agreements), medical residencies, etc.. Select the appropriate radio button to indicate Yes or No.

Document Source

Was your contract created from a standard University of Illinois template? Were any changes made to the template? Was your contract provided by the other party? Was your contract drafted by an OBFS Buyer or Coordinator? Select either Custom, Other Party, Template No Changes or Template with changes. If you position your mouse to hover over the question mark  icon, you will see definitions of each of these selections.

Section 2 – Contracting Party

Please enter all of the requested information about the contracting party. It is important to include a contact name, phone number and email address in case questions arise or follow-up is needed. Much of this information can be found on a company's website, if you do not already have it.

Name

Type the name of the organization or entity with whom the University is contracting (e.g. "ABC Company").

Contact

Type the name of a contact person within the organization (e.g., "John Doe"). If the contracting party is an individual, then the same name would go in both Name and Contact.

Phone

Type the phone number (including area code) of the contact person. If you do not have a phone number for that individual, then a general phone number for the organization is also fine.

E-Mail

Type the email address of the contact person. If you do not have an email address for that individual, a general email address for the organization is also fine.

Address

Type the complete mailing address for the contracting party. Include the country if the organization is not in the United States.

Section 3 – Unit Information

Please enter all of the requested information about the University unit. It is important to include a contact name, phone number and email address in case questions arise or follow-up is needed.

Name

Type the name of the University unit (e.g. "Office of Business and Financial Services").

Contact

Type the name of the contact person within the unit. If CSO has any questions, or needs any additional information about the contract, they would contact the person listed as the Unit Contact on the CARF.

Phone Number

Type the campus phone number of the contact person within the unit.

E-Mail

Type the email address of the contact person within the unit.

Address

Type the campus address (including mail code) of the contact person within the unit. This is the address to which the fully executed contract and completed CARF will be returned.

Section 4 – Preliminary Approvals

****NOTE: THIS SECTION HAS RECENTLY CHANGED****

Unit Head

Type the name of the Unit Head on the first line and obtain his/her dated signature on the second line.

A Unit Head is defined by policy as a department head or higher. For UA units, this is the director responsible for the performance of the contract. See OBFS Policies and Procedures Manual, Section 2.3 for more information. [Link to

<http://www.obfs.uillinois.edu/cms/one.aspx?portalId=909965&pageId=913377#definitions>]

This is a required signature that cannot be delegated. However, the signature of the next higher level administrator negates the need for approval(s) at a lower level. This means that, if your Unit Head is unavailable, you can skip this line if you obtain the Dean/Director or Vice Chancellor signature instead.

Dean/Director

Type the name of the Dean/Director on the first line and obtain his/her dated signature on the second line.

For UA units, this is the executive director or next higher level of approval.

This signature is only required for contracts with a total amount of \$50,000 or more.

This signature may be delegated. The unit must maintain documentation of such delegation in their own files for audit purposes.

Signature of the next higher level administrator negates the need for approval(s) at a lower level. This means that, if your Dean/Director is unavailable, you can skip this line if you obtain the Vice Chancellor signature instead.

VP/Chanc./V.Chanc.

Type the name of the Vice President/Chancellor/Vice Chancellor on the first line and obtain his/her dated signature on the second line.

For UA units, this is the Assistant Vice President or next higher level of approval.

This signature is only required for contracts with a total amount of \$150,000 or more.

****WHEN YOU REACH THE END OF THIS SECTION, YOU ARE FINISHED WITH YOUR PORTION OF THE CARF.****

Section 5 – Final Approvals

Do not complete. This section is completed by OBFS and University Counsel (if needed).

University Comptroller

The OBFS delegate who executes the contract in the name of the University Comptroller will type his/her name onto this line.

University Counsel

If approval signature from University Counsel is required, the OBFS Buyer or Coordinator processing your contract will type the name of the attorney who signs the contract, or provides electronic approval in the Illinois Contract System (iCS).

OBFS Use Only

Do not complete. This section is completed by OBFS.

All applicable information will be printed or typed on the CARF when it is returned to you with the fully executed contract. You should retain the completed CARF in your unit files.

If you have any questions regarding the CARF, please contact the Contract Services Office at UrbanaCSO@uillinois.edu.