

DeSoto Independent School District
Business Services Department

DESOTO ISD CONTRACT REVIEW CHECKLIST

Requestor Submits the following Required Contract Packet, Contract, Forms, and other Documentation to Director of Purchasing:

- ☐ DESOTO ISD CONTRACT PACKET with all necessary signatures in place from:
 - ☐ Requestor,
 - ☐ Administrator
 - ☐ Grant Manager (required if funded through federal & state grants including entitlement funds)
 - ☐ Cabinet Member (required if contract for staff development)
- ☐ Signed and Completed Contract and Other Required Forms
 - ☐ **(A) Vendor/Contractor's Contract or**
 - ☐ **(B) DeSoto ISD Contracted Services Contract** (Use district contract if vendor/contractor does not supply one.)
 - ☐ **Other Required Forms**
 - Representations and Certifications form
 - New Vendor/New Address Information Request form
 - W-9
 - Addendum Contract Provisions for Contracts Under Federal Awards form (if contract is funded through federal & state grants including entitlement funds)

Director of Purchasing Reviews Required Contract Packet, Contract, Forms, and other Documentation.

- ☐ If the Contract is not acceptable as is, the Director of Purchasing shall contact the contracting party to attempt to resolve the deficiency(ies).
- ☐ If the Contract is approved recommended as is, the Contract will be forwarded to Chief Financial Officer (and possibly legal counsel) for final review and approval (signature). The Superintendent and the CFO can approve all contracts below the \$25,000 threshold
- ☐ Contracts in excess of \$25,000 should be brought to the Board for approval by Originator or the Director of Purchasing.

After Contract is approved the campus/department originator shall verify that the contract document(s) have been executed and take the following steps:

- ☐ Ensure that both parties (District and Contractor) have executed the contract.
- ☐ Upon receipt of the original, signed contract, the originator shall file the original contract and email a copy to the Purchasing Director.
- ☐ The Purchasing Specialist shall enter the new vendor in the TEAMS database upon receipt of the New Vendor/New Address Information Request form and a properly executed W-9 form. She will notify the originator of the vendor number.
- ☐ Originator will enter purchase requisition in TEAMS and attach copy of approved signed contract.
- ☐ Upon receipt of the approved purchase requisition, the Purchasing Specialist shall review and approve the requisition after ensuring that a copy of the contract is attached to the requisition.
- ☐ The contract originator shall ensure that the contracting party performs the services covered by the Contract.
- ☐ The contract originator shall sign the invoice to certify that the work was completed to satisfactory standards.
- ☐ Upon completion of the service(s), the vendor shall forward an invoice with the purchase order number noted on invoice(s) to the Accounts Payable Department via email at financeinvoice@desotoisd.org to request that payment be made to the contracting party.