

**UNIVERSITY OF SOUTH ALABAMA  
AGREEMENT CHECKLIST**

**Instructions:** Section I, Section III (if appropriate) and Section IV must be completed for every agreement between USA and another institution, organization or business. If this Agreement is grant-funded, Sections I, II, III and IV must be completed entirely and sent to the appropriate College / Department Grant Administrator.

**I. AGREEMENT INFORMATION**

1. OSP Log # or Attorney's Office Log # \_\_\_\_\_ / \_\_\_\_\_
2. Agency / Vendor \_\_\_\_\_
3. Title \_\_\_\_\_
4. Monetary Amount of Agreement (if applicable) \$ \_\_\_\_\_
5. If this is a USA template, I verify there were no changes made. Sign here→ \_\_\_\_\_
6. Has this Agreement been bid/RFP through USA Purchasing? YES  NO   
*If yes, is E-Verify Company Profile Document attached?*  
*Items available from only one vendor/manufacturer may be approved as sole source after a review by the Purchasing Agent. To facilitate this review, a detailed statement, written and signed by the user and attested to by the Department Head, must accompany the requisition.*
7. Source FOAPAL # \_\_\_\_\_
8. Deadline for Final Execution \_\_\_\_\_  
 Is this Agreement funded by an external grant? YES  NO   
*If yes, route to Department / College Grants Administrator*
10. Is this a request for a modification to an existing Agreement? YES  NO   
*If yes complete this form: <http://www.southalabama.edu/oga/pdf/agreementmod.pdf>*
11. Principal Investigator / Responsible Person \_\_\_\_\_  
 Telephone # \_\_\_\_\_ Dept. \_\_\_\_\_ Bldg/Room # \_\_\_\_\_

**II. SUBRECIPIENT INFORMATION (grant-related only)**

Subrecipient Name \_\_\_\_\_  
 Subrecipient Contact \_\_\_\_\_ Email \_\_\_\_\_  
 Subaward Title \_\_\_\_\_  
 Subaward Start Date \_\_\_\_\_ End Date \_\_\_\_\_

**III. COMPLIANCE INFORMATION**

Will human subjects be used in the course of the research at USA or at collaborating institution?  
 YES  NO  Note: If "YES", copy of approval required. **For assistance, please call 460-6308**

Will animals be used in the course of the research at USA or at collaborating institution?  
 YES  NO  Note: If "YES", attach approval letter. If at a foreign site, follow USA IACUC guidance at <http://www.southalabama.edu/researchcompliance/pdf/domesticandforeignsubcontracts.pdf> **For assistance, please call 460-6863**

**EXPORT CONTROLS**

YES  NO  Will any equipment be shipped by the University in the course of this project?  
 YES  NO  Will this project require any export controlled items or information to be received on campus?  
 YES  NO  Will this project involve any foreign nationals?  
**For assistance, please contact Amy Delcambre at 460-6509**

**CONFLICT OF INTEREST**

YES  NO  Have all participants involved in this project complied with the policies of their institution regarding disclosures of conflict of interest(s)?

**HIPAA**

YES  NO  Will this Agreement involve the use, disclosure, or access by the vendor to identifiable health information of any patient?

**IV. AUTHORIZATION**

I have read this Agreement, including all attachments and exhibits and have reviewed this Agreement with the Administrator, Dean, Vice President, Director or Chair, and that individual is aware of all business terms of this Agreement. The business terms negotiated and agreed to by the parties are contained in this Agreement.

**Principal Investigator or**

**Responsible Person** \_\_\_\_\_ **Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

I am aware of all business terms of this Agreement and approve.

**Dean / Department Head / Administrator**

\_\_\_\_\_  
**Printed Name** \_\_\_\_\_ **Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

Date released by legal office for: (a) requested changes to Agreement \_\_\_\_\_  
 (b) execution by agency/vendor/USA \_\_\_\_\_

Date signed by agency/vendor \_\_\_\_\_ Date signed by University \_\_\_\_\_

Return copy of this checklist to legal office upon completion of agreement process. Retain original checklist and agreement in above-identified department. The State Records Commission, under authority granted by Section 41-13-21 of the Code of Alabama, 1975, mandates that all agreements, leases and contracts be retained for seven years after the terms of the document are fulfilled and then destroyed. All real property leases and capital improvement agreements are to be retained permanently.