

Important: Please consult the [SIMBA Payment Decision Matrix](#) to determine authorized payment method and then check the payment method to be used:

CHECK ONE: Non-PO Invoice Non-Financial **(Risk Management does not process agreements paid by PO or P-Card)**

Agreements being paid with a Purchase Order or Purchasing Card will need to be processed through [Purchasing Services](#). Purchasing Card payment related contracts should be sent to pcard@psu.edu with the subject line of Contract/Agreement Review for P-Card Transaction.

<p style="text-align: center;">Risk Management Notes for Assistant Treasurer Do not write in this section</p>	<p>Submit cover sheet and contract by ONE of the following methods: Email: riskcontracts@psu.edu Interoffice: 103 Rider Bldg/UP</p> <p>Contract Service/Performance Date _____</p> <p>Name of Vendor/Other Party _____</p> <p>SIMBA Vendor Registration # (if applicable) _____</p> <p>Mailing Address for Vendor/Other Party _____</p> <p>Check here if Certificate of Insurance needs to be issued to the Vendor/Other Party <input type="checkbox"/> Check here if foreign entity <input type="checkbox"/></p>
<p>Brief Description about the contract and/or Special Notes:</p>	
<p>Ag – Cooperative Extension Only</p>	<p>*Is this event sponsored by the University <input type="checkbox"/> Yes <input type="checkbox"/> No *If yes, will an employee be present and in charge? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>*If a volunteer will be present and will be in charge of the event, stop here and contact The Wood Agency.</p>
<h2 style="color: red;">Penn State Initiating Department Information</h2>	
<p>Please check the appropriate option below:</p> <p>Option 1 <input type="checkbox"/> Signature Requested</p> <p>By selecting Option 1, the Contract Requester affirms on behalf of their Department the terms of this contract, including if any, the financial obligations and business terms have been read and agreed to, and will comply with the following:</p> <ul style="list-style-type: none"> ▪ Initiating Department must forward the signed contract to the Vendor/Other Party as this will not be done by the Assistant Treasurer’s Office, nor Risk Management. ▪ Initiating Department must verify that any changes made to the contract by the University have been accepted by Vendor/Other Party. If changes were not accepted contact Risk Management’s Contract Team at riskcontracts@psu.edu or 814-867-4906. ▪ Initiating Department must secure and maintain a copy of the contract that has been signed by all parties as the official University record. For the University’s records retention policy refer to AD35. <p>Option 2 <input type="checkbox"/> Review Only</p> <p>By selecting Option 2, the Contract Requester is requesting Risk Management review the contract and provide feedback to the Contract Requester. The contract is not to be sent for signature.</p>	<p style="text-align: center;">Please complete the information below:</p> <p style="text-align: center;">Initiating Department</p> <p>(College, Admin Area/Campus) _____</p> <p style="text-align: center;">Contract Requester</p> <p>Name: _____</p> <p>Email Address: _____</p> <p>Phone Number: _____</p> <p>Mailing Address: _____</p> <p>_____</p> <p>_____</p> <p style="text-align: center;">Contact person for questions relating to the contract (if other than Contract Requester listed above)</p> <p>Name: _____</p> <p>Email Address: _____</p> <p>Phone Number: _____</p>
<p style="text-align: center;">Have questions or want to check the status, please contact our office at riskcontracts@psu.edu.</p>	
<p>This section is only for areas with special approval and routing protocols. (i.e. Student Affairs, Health/Human Dev.)</p>	<p>Risk Management notes to Initiating Department:</p>
<p>Financial Officer or Department Approval</p>	