**Contract Checklist LEX [admin only]**

**To be used for all contracts from Monday 3rd June 2019.**

Please print, complete and attach this document to the contract.

Delegations for signing contracts based on total contract over whole-of-life:

[ ]  Up to $5,000 – Responsible ED [ ]  $5,000 to $100K – CFO

[ ]  $100K to $1M – CEO [ ]  Over $1M - CEO (With Board Approval)

**(1) Contract Overview**

**Supplier/ Other Party: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

### **Title of Contract: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |
| --- |
| *[Insert description of goods and/or services being contracted for…]* |

|  |  |
| --- | --- |
| Commencement Date of Service: \_\_\_\_\_\_\_\_\_[*Insert either the date the contract is signed by the last party, or a set specific date*]  | Initial Term of Contract: \_\_\_\_\_\_\_\_\_\_\_\_Optional Extension Periods: \_\_\_\_\_\_\_\_\_\_\_\_\_ |

Name of stakeholder (contract owner) responsible for ongoing management of contract: \_\_\_\_\_\_\_\_\_\_\_\_\_

Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Department: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: / /

**(2) Procurement Compliance** (NB. Research contracts can skip this step)

Is this contract an Austin Health template contract? Tick: [ ]  YES / [ ]  NO

All contracts need to be reviewed by Austin Health’s Legal Counsel, except if **all** the following conditions are met:

* Contract is under $50k whole-of-life: (including products, maintenance over equipment life, extension periods and consumables): Tick: [ ]  YES / [ ]  NO

**AND**

* Contract period is less than 12 months, including any optional extension periods: Tick: [ ]  YES / [ ]  NO

**AND**

* Senior Contracts Manager or Group Procurement Manager confirms that the risk presented by the goods and/or services do not require Legal Counsel review:

Tick: [ ]  YES (no need for Legal review) / [ ]  NO (Legal review is required)

This contract complies with the Procurement Policy and any authorized Exemption (e.g. COE) is attached:

Name of Senior Contracts Manager / Procurement member: \_\_\_\_\_\_\_\_\_\_\_\_\_

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: / /

**(3) Finance and Sign-off by Finance Business Partner**

[ ]  Cost / [ ]  Revenue pa ($): \_\_\_\_\_\_\_\_\_ [ ]  Cost / [ ]  Revenue life of contract ($): \_\_\_\_\_\_\_

Department: \_\_\_\_\_\_\_\_\_\_\_ Cost Centre: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Will equipment be under a lease? Tick: [ ]  YES / [ ]  NO

If YES, download and attach completed [**lease form**](http://172.27.2.218:8000/Assets/Files/Lease%20Checklist.pdf)with this Contract Checklist.

|  |
| --- |
| Name of Finance BP: \_\_\_\_\_\_\_\_\_\_\_\_\_ Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: **/ /** |

####  (4) Sign off by Legal Office (if not exempt per section 2 above)

|  |
| --- |
| Name of Legal Counsel: \_\_\_\_\_\_\_\_\_\_\_\_ Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: **/ /** |

|  |
| --- |
| Risk rating and commentary regarding key call-outs and/or risks in contract: |

#### (5) Sign off by Director

|  |
| --- |
| Name of Director: \_\_\_\_\_\_\_\_\_\_\_\_\_ Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: **/ /** |

 **(6) Contract approved in principle by ED/CMO/CNO/COO**

|  |
| --- |
| Name of ED/CMO/CNO/COO: \_\_\_\_\_\_\_\_\_\_\_ Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: **/ /**(see delegation above) |

 (7) Sign off by contract signatory [see delegation level above]

Name of delegated authority for contract signatory: \_\_\_\_\_\_\_\_\_\_\_\_\_

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: / /

Once fully executed, return this completed Contract Checklist to the applicable Procurement member or the stakeholder (contract owner).

The responsible stakeholder (contract owner) will:

* Ensure both parties fully execute two hardcopies of the contract
* Scan and retain a copy for their own records
* Send a fully executed hardcopy of contract to supplier
* Provide a fully executed hardcopy of contract and Contract Checklist to Central Registry HSB4 for filing
* Advise either Central Registry or the Senior Contracts Manager to load this contract onto LEX database