

TECHNOLOGY AGREEMENT

After you have preformed your due diligence and are ready to proceed with the procurement process with a vendor, the vendor may require the University to sign a contract. The University has a Technology Agreement template that will incorporate the NYS standard language, vendor pricing and applicable vendor terms and conditions.

This “how to” guide will walk you through the steps to create a draft agreement to provide to the vendor for their initial review.

use this template for ...

- software applications
- software licenses
- databases
- subscriptions
- computers and technology hardware
- equipment with software components



steps to follow ...

1

Prepare a draft agreement for the vendor to review

2

Provide draft agreement to vendor for their review and obtain required documents

3

Submit the vendor response to the contract workflow for review and approvals

documents needed ...

- [Technology Agreement](#) template
- [NYS Exhibit A](#)
- [NYS Exhibit A-1](#) (\$25,000 and above)
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1

PREPARE DRAFT AGREEMENT

The [Technology template](#) is to be used for any technology purchases such as databases, software, subscriptions, hardware etc.

Complete the template by entering in the informa

PREPARE DRAFT AGREEMENT

7. Section 18. Notices

PREPARE DRAFT AGREEMENT

8. For contracts \$75,000 and above, the vendor shall be required to provide a draft agreement for review and approval by the agency. The draft agreement shall be submitted to the agency within 10 business days of the date of the purchase order. The draft agreement shall be submitted to the agency in a format that is compatible with the agency's information system. The draft agreement shall be submitted to the agency in a format that is compatible with the agency's information system. The draft agreement shall be submitted to the agency in a format that is compatible with the agency's information system.



2

Provide draft agreement to vendor for their review and obtain required documents

PROVIDE THE FOLLOWING TO THE VENDOR FOR THEIR REVIEW

1. Draft agreement
2. [NYS Exhibit A](#) (pdf) can't be modified
3. [NYS Exhibit A-1](#) (pdf) can't be modified, only applies if the total dollar amount of the agreement is \$75,000 or higher

OBTAIN THE FOLLOWING FROM THE VENDOR

1. Order Form, Quote, Statement of Work or Proposal that outlines the products and/or services, the terms and the pricing (MS Word format preferred) This will become Exhibit B.
2. MS Word version of their terms and conditions and any other documentation that is referenced in their terms that the University must agree to. This will become Exhibit C
3. Software documentation (as applicable)
 - a. [Higher Education Community Vendor Assessment Toolkit](#) For More information [click here](#)
 - b. [Voluntary Product Accessibility Template](#) For more information [click here](#)
 - c. SOC2 Report (if available)



Submit the vendor responses to the [contract workflow](#) for review, approvals and signatures.

SUBMIT THE FOLLOWING INFORMATION TO THE CONTRACT WORKFLOW

1. Draft agreement that has been reviewed / edited by the vendor
 2. Email from vendor with open issues/questions relating to contract or documentation requested (pdf format)
 3. Order Form, Quote, Statement of Work or Proposal that outlines the products and/or services, the terms and the pricing (MS Word format preferred)
 4. MS Word version of their terms and conditions and any other documentation that is referenced in their terms that the University must agree to.
5. Software documentation (as applicable)
 - a. [Higher Education Community Vendor Assessment Toolkit](#) For More information [click here](#)
 - b. [Voluntary Product Accessibility Template](#) For more information [click here](#)
 - c. SOC2 Report (if available)