**Fiscal Review Checklist**

A non-competitive amendment (that meets the $250,000 and over one year threshold) ***must***be presented to the Fiscal Review Committee (FRC), ***60 days prior to the proposed effective date***, if it meets ***any***of the following conditions:

* a non-competitive amendment requested;
* revises (increases or decreases) the maximum liability;
* adds new services, deletes services or revises the scope of services in any manner;
* reflects name change, merger, acquisition, or change in control of a vendor; or
* revises (extends or shortens) the original term of the contract unless provision for extension as well as funding for the potential term is included in the original contract.

Use the following checklist to ensure copies of the proper documents have been submitted to Fiscal Review Committee:

* SUPPLEMENTAL DOCUMENTATION FORM – Form must be completely filled out with back-up documentation for current total expenditures.
* APPROVED RULE EXCEPTION REQUESTS (if appropriate)
* COPY OF PERFORMANCE BOND IF REQUIRED IN THE CONTRACT (if performance bond must be renewed each year, a copy of the renewal)
* ORIGINAL CONTRACT

If *new* non-competitive contract, actual language of the proposed contract (can be in draft form if necessary).

* SUMMARY SHEET FOR CONTRACT (original or proposed)
* REQUEST FOR CONTRACT (competitive or non-competitive)
* ALL PRIOR EXECUTED AMENDMENTS
* SUMMARY SHEET FOR EACH PRIOR AMENDMENT
* ANY REVISED SUMMARY SHEETS
* REQUEST FORM FOR NON-COMPETITIVE AMENDMENT

If *new* amendment, actual language of the proposed amendment (can be in draft form if necessary).

* SUMMARY LETTER WITH ATTACHED FORM
  + Detailing terms of contract or amendment and the basic justification for the non-competitive procurement.
  + If request is submitted less than 60 days before effective date, a detailed explanation for why the request is late.
* ANY ADDITIONAL SUPPORTING DOCUMENTS
* FULLY EXECUTED COPY OF FINAL DOCUMENT IMMEDIATELY UPON RECEIPT BY THE DEPARTMENT

University will submit all renewals and amendments of any kind to Fiscal Review for review and approval per T.C.A. § 4-56-107.