

# CES ITS Handoff Coordination Checklist

Original Release, August 2023

This checklist has been created to assist in the efficient and effective transfer of software titles that are transitioning to CES ITS provisioned funding. The actions identified below are to be initiated and performed by the transferring entity unless otherwise noted on the checklist.

## 1. INTERNAL COORDINATION (within CES)

- Periodic updates shall be provided regarding the status of proposed and final approved software titles included on the annual CES ITS annual funding list (to be provided by CES Contracts personnel during regular CES Procurement Center and ITS Quarterly meetings)
- Begin coordination and provide notification of upcoming transfer of software titles to CES Contracts (ideally 90 days prior to the next renewal or anniversary date – initial CES contact is Trevor Thiriot at trevor.thiriot@byu.edu and 801-310-1929)
- Transfer to CES Contracts electronic copies of relevant historical contract files for reference
- Provide to CES Contracts vendor contact information including name(s), email(s), phone number(s)
- Provide to CES Contracts applicable internal programmatic and technical contact information including name(s), email(s), phone number(s)
- Initiate any required CES internal meetings/discussions regarding programmatic or technical elements of the software's usage which may require special cross-campus coordination for administration. Be sure to include the appropriate campus representatives and/or stakeholders (such coordination may require structural changes or adaptations to avoid any unanticipated or unforeseen impacts).

## 2. EXTERNAL COORDINATION (with Vendor)

- Provide appropriate\* written notification to vendor of upcoming transition to CES ITS funding
- Provide vendor with CES Contracts contractual and billing contacts and request that vendor update their records to reflect the changes
- Ensure successful completion of the handoff through coordinated follow-up and validation with the vendor
- If required, initiate a "PaymentWorks" request for the establishment of a vendor record to enable billing activities through the BYU Office of IT (to be performed by the CES Contracts personnel)

\*Providing "Appropriate notification" may vary depending upon specific contractual requirements and/or the state of the relationship with the vendor (e.g., could range from an email with new CES contacts cc'd to execution of a contract amendment specifying new points of contact)