Equipment Sale Agreement Process

End-User Guide

Last Updated: June 18, 2025

Overview:

This document is intended for use by a Yale department as a guide for completing the Equipment Sale Agreement process using the OnBase system.

Moveable Equipment Transfer/Release Form Link

Process Instructions:

1. Submit your request via the Moveable Equipment Transfer/Release Form.

   To proceed with an equipment sales request, please submit the Moveable Equipment Transfer/Release Form Link. To access the Form, log in with your existing Yale NetID and Password. You will receive an email notification confirming your submission.

2. If OGC or the Controller's Office requires updates to your request:

   Once your Form is submitted, your request will be reviewed by the Office of the General Counsel. If you have indicated on the form that the property exists in the MEI Database, your request will first be reviewed by the MEI Team in the Controller's Office.

   If OGC or the Controller's Office requires changes or additional information, you will receive an email notification specifying the requested changes. Make these changes by directly updating your Form from within the OnBase system as described below.

   How to update your form:

   - Log into OnBase to access the Equipment Sales Processing System.
   - Click "bento box"  icon in the upper left corner and select "Open Workflow". A new browser window may open.

- In the left navigation pane, click the drop-down arrow next to **OGC4 Equipment Sales Processing** and select **OGC4 Intake Form Changes** Select the Intake Form.
- Make the required changes by editing the Form directly. When you are done, scroll to the bottom of the Form, check the box next to "Required Changes Have Been Made," and click "Submit".

Once your changes have been submitted, OGC or the Controller's Office will review your updated submission. If there are any additional change requests, you will receive an email notification.

3. Review and approve the draft agreement.

After approving your Intake Form, OGC will prepare a draft agreement. You will receive an email notification requesting your review and approval of this draft.

How to edit or approve the draft:

- Log into OnBase to access the Equipment Sales Processing System.
- Click "bento box"  icon in the upper left corner and select "Open Workflow". A new browser window may open.
- In the left navigation pane, click the drop-down arrow next to **OGC4 Equipment Sales Processing** and select **OGC4 Department Draft Contract Review**. Select the draft you wish to review.
- To approve the draft without any edits, click the "Approve Draft" button in the menu above the document and follow the prompts.
- To edit the draft:
    - Click the "Edit" link next to the pencil icon to the upper right of the draft below your name. If prompted, please allow popups from this site.
    - The draft will open in a new browser window. Edit the draft and close the window when you have completed making all changes.
      Track Changes will be on by default, and your edits will appear in redline (simple markup). Do not change this setting.
    - Return to the OnBase system in your browser. Refresh your screen and confirm that your changes now appear on the draft. Click the "Approve Draft" button, and answer "Yes" to the question of whether you made any changes.

If you made edits to the draft, OGC will review the edits, and this step will be repeated.

4. Buyer reviews the draft agreement

   After you approve the draft agreement, you will receive an email notification requesting review of the draft from the Buyer. The draft will be attached to that email.

   Please email the draft to the Buyer for their review. Once you receive confirmation from the Buyer that they are ready to proceed with signatures, or if the Buyer is proposing edits to the agreement, please notify your contact in the Office of the General Counsel via email.

   Please let the Buyer know that once the agreement is finalized, they will receive a notification via DocuSign for signature.

5. Final version is sent out for signature via DocuSign

   OGC will do a final review of the draft and then send it for signatures via DocuSign. The Buyer will receive an email from the Yale DocuSign account requesting their signature. Once the Buyer signs, DocuSign will request a signature from the Controller's Office.

   After all parties have signed the agreement, they will receive the signed agreement in an email from DocuSign. You will also receive a copy of the agreement in a separate email.