

Instructions: Use of this checklist is optional, but suggested. Use this checklist after you have received approval to sell services externally, using [Form 2100 FR.02 External Sales Approval Request – Standard Form](#). Per [Procedure 2100 PR.02 External Sales Approval Process](#), Requestors should use this checklist to ensure continued compliance with their approval prior to executing any contract to sell to a specific external customer.

Section I – Proposed External Sale Information

In the box below, provide the name of the proposed external customer and a description of the proposed services to be provided.

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Section II – External Sale Checklist

Use the checklist below prior to executing a contract for external sales to ensure continued compliance.

- The rates to be charged are the rates approved during the approval or annual reapproval Process;
- The types of non-Yale individuals, if any, who will need to come on campus were approved and are handled as stipulated in the approval process;
- The types of non-Yale research materials (defined as gases, materials or items (hazardous or otherwise) that contain any of the following substances: biological, chemical, and/or radioactive materials), tools, equipment, software, data, or other physical or intangible property that may be used in providing the services were approved and are handled as stipulated in the approval process;
- The Yale facilities and resources (defined as fixed or moveable equipment, datasets, subscriptions, technology, software, or materials and supplies) involved in providing the services are the facilities and resources that were approved;
- The external customer has been screened for denied or restricted party status using Visual Compliance and does not have such status;
- The technology (e.g., devices, tools, reagents, software, animal models) used to provide the services does not violate any license or material transfer agreement;
- The contract is on an approved template;
- The process for executing the contract is the process that was approved during the approval process; and
- All products that are shipped as part of the contract will use [eShipGlobal](#).