

Date: _____	Who is this purchase for? _____
Vendor Name: _____	Who completed this worksheet? _____
Term of Service/Agreement: _____	Phone# or Email for that person: _____

1. Provide a brief description of your understanding of the services the vendor will provide, in your own words.
(Please do not copy text from the vendor's quote/proposal.)

2. What sort of data will the vendor process, or the system store/manage?

3. Will the vendor have access to any UC system that requires the vendor to login? If yes, which system(s)?

4. Check the applicable box(es) for information about this purchase:

- This is a renewal for an existing agreement
- This purchase leverages a system wide agreement (UCOP) or an agreement from another UC
- This purchase applies to a master services agreement or blanket purchase order
- This purchase is for a software license
- If a software license, the software will operate on the vendor's systems (software as a service)
- This purchase if for maintenance of hardware or software
- This purchase is for web or software development services
- This purchase is for consulting services

5. Check the applicable box(es) for the types of that will be data shared with the supplier:

- UCSB giving the vendor data as part of this purchase
- The vendor be collecting data from others on behalf of UCSB as part of this purchase

- Name, Address, phone number or other contact information
- Payment/Credit Card Data
- Personally Identifiable Information (PII) including social security, driver license, visa or passport numbers
- International Data (GDPR) - Information about individuals located in the EU (European Union, UK, Iceland, Liechtenstein or Norway) – [click here for examples for GDPR](#)
- Health Records or Health Insurance Information
- Human Subject Research Data (even if anonymized)
- Research data that includes UC Intellectual property (IP) (such as patents, copyright, or trade secrets)
- UC Employee Data
- Student Data (FERPA)
- Student Financial Aid Data
- Federal Government Regulated Data (CDI, CUI, CTI, ITAR and/or EAR)
- Animal Research Data