PROCEDURE FOR CONTRACT REQUESTOR

STEP ONE NAVIGATE TO HTTPS://WWW.PNW.EDU/BUSINESS-SERVICES/ AND CLICK LINK UNDER THE TYPE OF CONTRACT REQUEST BEING SUBMITTED (FIGURE 1), SIGN INTO DOCUSIGN AND THEN TEMPLATE WILL AUTOMATICALLY OPEN, THEN SKIP TO STEP 3.

Figure 1

Contract Requests

Please note contract review and approval can typically be completed within 15 business days. Additional review time may be required if a proposed agreement is in excess of $250,000, if it includes complex terms, or if it presents significant risks.

Professional Services Agreement Request
Professional Service Agreements are documents executed between Purdue University Northwest and another company for the purpose of providing services.

Entertainment Contract Request
Entertainment contracts are documents executed between PNW and an individual or company for the purpose of providing or participating in an entertainment event on the Hammond or Westville Campus.

Nursing Contract Request

Speaker Contract Request
Speaker contracts are documents executed between Purdue University Northwest and another individual or company for the purpose of providing or participating in an event on the Hammond or Westville Campus.

Consultant Contract Request
Agreements for Consulting Services are documents executed between Purdue University Northwest and an individual or company for the purpose of providing consulting services. Email: contracts@pnw.edu
Step 2: If signing in through DocuSign from the Purdue OneCampus portal

On the top of the page navigate to Templates and on the left side of the screen click All Templates (Figure 2). On the right side of the screen under All Templates, you can scroll to locate the contract request template or search in the “search All Templates” box located at the top right.

The following contract request templates are available with a brief description of when to use each:

- **PNW- Speaker Contract Request** – when an individual or organization is coming to speak at PNW or speak virtually to a PNW audience.
- **PNW- Consultant Contract Request** – when an individual or organization will work with PNW to consult on a project.
- **PNW- Entertainment Contract Request** - when an individual performer or organization is coming to provide services for entertainment activities at PNW.
- **PNW- Professional Services Agreement Request** - when an individual or organization will provide professional expertise to PNW.
Step 3: Once the contract request type is determined, utilize the form needed to complete the request.

Click on the black box on the right or top of page that states “USE” as shown in (Figure 3) and (Figure 4). This will automatically populate the next page for entry.

Figure 3

![All Templates](image1.png)

Figure 4

![PNW - Speaker Contract Request](image2.png)
Step 4 The add recipient page will automatically open – Action will need to be taken with the following recipients: Requestor, Department Approval, and Grants

The REQUESTOR FIELD (Figure 5) will require the requestor’s name and email address (only @purdue.edu or @pnw.edu). **Contracts cannot be requested on behalf of another requestor.**

The DEPARTMENT APPROVAL FIELD will require the requestor’s department head’s name and email in the Department Approval field.

![Figure 5](image)

The GRANTS box is automatically loaded for every request but is only needed if grant accounts are going to be charged for any contract costs. If the account number that will used for funding is not a grant account, please click the trash can on the right of the Grants box to delete it.

The Business Managers Office, Contracts, and Viewer are prepopulated and cannot be altered (Figure 6).

![Figure 6](image)
Step 5 On the same page under add recipients’ section, the ADD MESSAGE field is required to be completely filled out

In the Email subject line, the following is required to be filled out: Account Number, Amount, and Department Name (Figure 7) Complete these fields with details of your request.

Note: If the characters remaining run out there are a couple of options: delete any unnecessary spaces, abbreviate the department, or add additional information to the Email Message Box.

Figure 7

Add message

- Custom email and language for each recipient

Email Subject *

Enter Message

Characters remaining: 10000

Step 6 After step 4 is complete, click the “send” button (Figure 8) at the bottom right of the page. A prompt will appear, click “sign now” (Figure 9).

If you need more time to gather information to complete the request, you can click the “sign later” button and the request can be located on the home page, under “action required” (Figure 10) or in the envelope inbox and click the “sign” box to enter the contract request form.

Figure 8
Step 7 The form will open with a dialogue box and click “Continue”. (Figure 11)

Step 8 Fill out the contract request form. See the attachments with more details for each type of request at the end of the training document.

Attachment A – Speaker Contract Request
Attachment B – Entertainment Contract Request
Attachment C – Consultant Contract Request
Attachment D – Professional Services Agreement Request

Each request form has required or optional boxes to complete with details.
**Step 9** After completing all required details, the requestor can add any additional documents to the request, and then to finalize the requestor would click the “sign” button (Figure 12)

Next to Vendor Contract – Supporting Documentation for review, there is a paperclip icon in yellow. This field is optional and only needed if the requestor has information to share in addition to the information already completed in the contract request (for ex. Invoice, quote, proposal, etc.).

Figure 12

**Step 10** The last step is to click the “Finish” button (Figure 13).

Once the finish button is clicked, the document is sent to the department approver.

Once the department approver reviews and approves, the document is sent to Grants (if applicable) for review and approval, then to the Business Manager for review and approval, and then to the Contracts Department for contract development. If at any point during the process, the contract request is declined by an approver or voided by the requestor, notifications are sent to the requestor and any approver prior to the decline and the request is voided. For example, if the requestor submits the contract request, department approval is given, and then the Business Manager declines to approve, the Contracts department would not be aware the contract request was submitted.

*Note: DocuSign sends email notifications as the request moves through the system. Please watch your email for DocuSign notifications.*

*If you need assistance, please email PNW Contracts at contracts@pnw.edu.*

Figure 13
## ATTACHMENT A – SPEAKER CONTRACT REQUEST

### Speaker Contract Request

#### Requestor Contact Information

- **Name:** Requestor’s Name
- **Department:** Requestor’s Department Name
- **Phone/Extension:** 219 333 3333
- **PNW email:** requester@pnw.edu
- **Internal Order Number (Account Number):** 320001111
- **Business Manager:** Department’s Business Manager’s Name

#### Vendor Information

- **Name:** Vendor’s W-9 Entity Name
- **Authorized Signer(s):** Vendor’s Signer’s Name
- **Address (Address, City, State, Zip Code):** Vendor’s Address
- **Phone Number:** 219 999 9999
- **Email Address:** vendor’s email address (must include @)

#### Contract Detailed Information

- **Event Name:** PNW’s Event Name
- **Event Date(s):** MM/DD/YYYY
- **Event Location:** (Campus, Building, Room, Virtual, Hybrid) Hammond – SULB – Room 360
- **Will the speaker be on site?** Yes No
- **If virtual or hybrid, who will be providing a virtual link?** PNW Speaker
- **Event’s Start Time (Central Time):** 04:00PM
- **Event’s End Time (Central Time):** 05:00PM
- **Speaker Fee:** $800.00
- **Will the University be paying for any travel expenses (flight, rental car, hotel, mileage, etc.)?** Yes No
- **Description and Amount of Itemized Travel Expenses:** Rental Car $333.00

*If more space is needed to list expenses, use the Details of Service box*

- **Who is responsible for making travel arrangements?** PNW Speaker

#### Details of Service

Details of what the speaker is covering, any materials being distributed by the speaker, and arrival time of the speaker

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**Vendor Contract - Supporting Documentation for review**

- **Standard Contract processing time is 15 business days from the approved contract request being received by the Contracts Office**

All payments and payment processes associated with this contract are the responsibility of the department requesting the contract.

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**Requester**

**Department Approval**

**Grants**

**Business Manager**
**ATTACHMENT B – ENTERTAINMENT CONTRACT REQUEST**

<table>
<thead>
<tr>
<th>Requestor Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name Requestor's name</td>
</tr>
<tr>
<td>Department Requestor's department name</td>
</tr>
<tr>
<td>Phone/Extension 219 - 777 - 7777 ext. ___</td>
</tr>
<tr>
<td>PNW <a href="mailto:email_requestor@pnw.edu">email_requestor@pnw.edu</a></td>
</tr>
<tr>
<td>Internal Order Number (Account Number) 320009999</td>
</tr>
<tr>
<td>Business Manager Department's Business Manager's Name</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vendor Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name Vendor's W-9 Entity Name</td>
</tr>
<tr>
<td>Authorized Signer(s) Vendor's Signer's Name</td>
</tr>
<tr>
<td>Address (Address, City, State, Zip Code) Vendor's Address</td>
</tr>
<tr>
<td>Phone Number (###-###-####) 219 - 999 - 9999 ext. ___</td>
</tr>
<tr>
<td>Email Address vendor's email - must include the @email.com</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contract Detailed Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event Name PNW's Event Name</td>
</tr>
<tr>
<td>Event Date(s) 1. MM/DD/YYYY 2.</td>
</tr>
<tr>
<td>Event Location (Campus, Building, Room) Campus - Westville LSF Plaza</td>
</tr>
<tr>
<td>Vendor Recommended Arrival Time (Central Time) 02:00 PM</td>
</tr>
<tr>
<td>Vendor Performance Start Time (Central Time) 03:00 PM</td>
</tr>
<tr>
<td>Vendor Performance End Time (Central Time) 06:00 PM</td>
</tr>
<tr>
<td>Will the University be providing any equipment for vendor use? ☐ Yes ☐ No</td>
</tr>
<tr>
<td>If yes, what will be provided? ☐ Details of what PNW is providing</td>
</tr>
<tr>
<td>Total Compensation $ 600.00</td>
</tr>
<tr>
<td>Details of Service &amp;/or Material to be provided</td>
</tr>
<tr>
<td>Details of what the vendor activities will be and/or what is included (for example, inflatable, DJ services, etc.)</td>
</tr>
</tbody>
</table>

Vendor Contract - Supporting Documentation for review

**Standard Contract processing time is 15 business days from approved contract request being received by Contracts Office**

All payments and payment processes associated with this contract are the responsibility of the department requesting the contract.

<table>
<thead>
<tr>
<th>APPROVALS:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requester</td>
</tr>
<tr>
<td>Department Approval</td>
</tr>
<tr>
<td>Grants</td>
</tr>
<tr>
<td>Business Manager</td>
</tr>
</tbody>
</table>
Consultant Contract Request

Requestor Contact Information

Name: Requestor’s name
Department: Requestor’s department name
Phone/Extension: 219-222-2222 ext.
PNW email: requestor@pnw.edu
Internal Order Number (Account Number): 3200008888
Business Manager’s Name: Department’s Business Manager’s Name

Vendor Information

Name: Vendor’s W-9 Entity Name
Authorized Signer(s): Vendor’s Signer’s Name
Address: Address, City, State, Zip Code
Vendor’s Address
Phone Number: 219-999-9999 ext.
Email Address: Vendor’s email
Fax Number:

Contract Detailed Information

Services Start Date: MM/DD/YYYY
Services End Date: MM/DD/YYYY
Total Compensation: $700.00
Scope of Work (Details of Service &/or Material to be provided)
Details of deliverables and timing

Vendor Contract - Supporting Documentation for review

APPROVALS:
Requester
Department Approval
Grants
Business Manager

Standard Contract processing time is 15 business days from approved contract request being received by Contracts Office.

All payments and payment processes associated with this contract are the responsibility of the department requesting the contract.
# ATTACHMENT D – PROFESSIONAL SERVICES AGREEMENT REQUEST

## Professional Services Agreement Request

### Requestor Contact Information

- **Name**
- **Requester's Name**
- **Department**
  - **Requester's Department's Name**
- **Phone/Extension**
  - **219 - 444 - 4444 ext. _____**
- **PNW email**
  - **requester@pnw.edu**
- **Internal Order Number (Account Number)**
  - **3200007777**
- **Business Manager**
  - **Department's Business Manager's Name**

### Vendor Information

- **Name**
  - **Vendor’s W-9 Entity Name**
- **Authorized Signer(s)**
  - **Vendor’s Signer’s Name**
- **Address**
  - **Address, City, State, Zip Code**
- **Vendor’s Address**
- **Phone Number**
  - **(###-###-####) 219 - 9999 - 9999 ext. _____**
- **Email Address**
  - **Vendor’s email**
- **Fax Number**
  - **optional**

### Agreement’s Detailed Information

- **Start Date of Services**
  - **MM/DD/YYYY**
- **End Date of Services**
  - **MM/DD/YYYY**
- **Total Compensation for entire length of Agreement**
  - **$1000.00**
- **Annual Compensation (if multi year agreement)**
  - **$_________**
- **Scope of Work (Details of Service &/or Material to be provided)**
  - **Details of deliverables and timing**

### Vendor Contract - Supporting Documentation for review

- **Standard Contract processing time is 15 business days from approved contract request being received by Contracts Office**
- **All payments and payment processes associated with this contract are the responsibility of the department requesting the contract.**

### APPROVALS:

- **Requester**
- **Department Approval**
- **Grants**
- **Business Manager**