

DOCUSIGN – CONTRACT REQUESTS

Launch Date: November 13, 2023

PROCEDURE FOR CONTRACT REQUESTOR

STEP ONE NAVIGATE TO [HTTPS://WWW.PNW.EDU/BUSINESS-SERVICES/](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

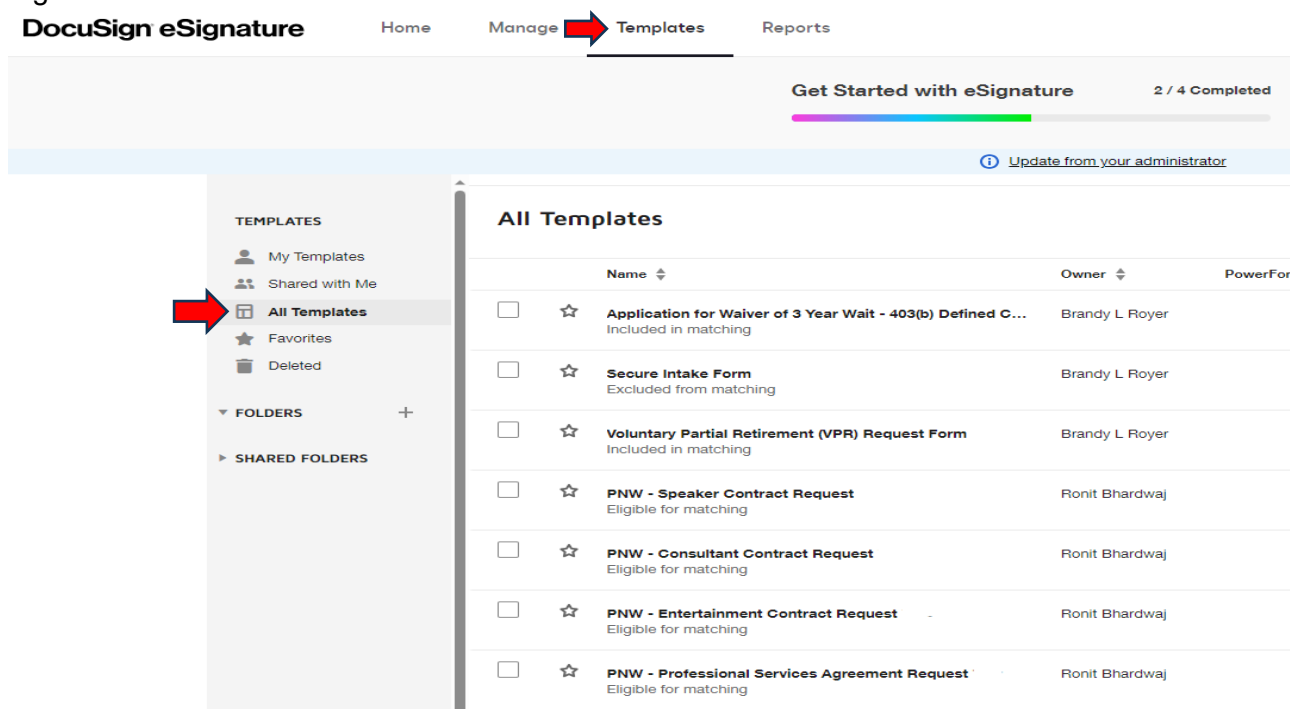
Step 2 If signing in through DocuSign from the Purdue OneCampus portal

- ✓ 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.

Figure 2



The screenshot shows the DocuSign eSignature interface. At the top, there are navigation tabs: Home, Manage, **Templates** (highlighted with a red arrow), and Reports. Below the tabs, there is a progress bar indicating 'Get Started with eSignature' is 2 / 4 Completed. A link 'Update from your administrator' is visible. On the left sidebar, under 'TEMPLATES', there are options: My Templates, Shared with Me, **All Templates** (highlighted with a red arrow), Favorites, and Deleted. Below this are 'FOLDERS' and 'SHARED FOLDERS'. The main content area is titled 'All Templates' and contains a table of templates.

	Name	Owner	PowerFor
<input type="checkbox"/>	☆ Application for Waiver of 3 Year Wait - 403(b) Defined C... Included in matching	Brandy L Royer	
<input type="checkbox"/>	☆ Secure Intake Form Excluded from matching	Brandy L Royer	
<input type="checkbox"/>	☆ Voluntary Partial Retirement (VPR) Request Form Included in matching	Brandy L Royer	
<input type="checkbox"/>	☆ PNW - Speaker Contract Request Eligible for matching	Ronit Bhardwaj	
<input type="checkbox"/>	☆ PNW - Consultant Contract Request Eligible for matching	Ronit Bhardwaj	
<input type="checkbox"/>	☆ PNW - Entertainment Contract Request Eligible for matching	Ronit Bhardwaj	
<input type="checkbox"/>	☆ PNW - Professional Services Agreement Request Eligible for matching	Ronit Bhardwaj	

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						Search All Templates		FILTERS	
<input type="checkbox"/>	☆	PNW - Speaker Contract Request	Ronit Bhardwaj	8/1/2023 02:51:26 pm	8/30/2023 09:03:23 am				USE
Included in matching									
<input type="checkbox"/>	☆	PNW - Speaker Contract Request	Ronit Bhardwaj	8/1/2023 03:01:19 pm	8/30/2023 03:38:27 pm				USE
Eligible for matching									
<input type="checkbox"/>	☆	PNW - Consultant Contract Request	Ronit Bhardwaj	8/1/2023 03:24:58 pm	8/30/2023 01:16:30 pm				USE
Eligible for matching									
<input type="checkbox"/>	☆	PNW - Entertainment Contract Request	Ronit Bhardwaj	6/26/2023 03:11:57 pm	8/30/2023 01:16:14 pm				USE
Eligible for matching									
<input type="checkbox"/>	☆	PNW - Professional Services Agreement Request	Ronit Bhardwaj	6/20/2023 09:04:56 am	8/30/2023 01:15:38 pm				USE
Eligible for matching									

Figure 4

☆ PNW - Speaker Contract Request

Template ID

USE

Recipients

SIGNING C

1

Requestor:

Needs to Sign

2

Department Approval:

Needs to Sign

3

Grants: PNW Grants Office

Signing Group

Needs to Sign

4

Business Managers Office: PNW Business Managers

Signing Group

Needs to Sign

5

Contracts: Contracts

contracts@pnw.edu

Needs to View

5

Viewer: Donna K Adelsperger

adelsper@purdue.edu

Receives a Copy

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

Add recipients

The screenshot shows the 'Add recipients' interface with three main sections:

- 1 Requestor:** Includes 'Name' and 'Email' input fields. Red arrows point to these fields.
- 2 Department Approval:** Includes 'Name' and 'Email' input fields. Red arrows point to these fields.
- 3 Grants:** Includes a 'Signing Group Name' field with 'PNW Grants Office' selected. A red arrow points to a trash can icon on the right.

Each section has a 'NEEDS TO SIGN' status and a 'CUSTOMIZE' dropdown menu.

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 be 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

The screenshot shows a list of prepopulated recipients:

- 4 Business Managers Office:** Status 'NEEDS TO SIGN'. Prepopulated 'Signing Group Name' is 'PNW Business Office'.
- 5 Contracts:** Status 'NEEDS TO VIEW'. Prepopulated 'Name' is 'Contracts' and 'Email' is 'contracts@pnw.edu'.
- 6 Viewer:** Status 'CC RECEIVES A COPY'. Prepopulated 'Name' is 'Donna K Adelsperger' and 'Email' is 'adelsper@purdue.edu'.

Each entry has a 'CUSTOMIZE' dropdown menu.

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 *

Contract Request: Account Number { }- Amount {\$ }- Department { }

Characters remaining: 24

Email Message

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

}- Department { }

Enter Message

Characters remaining: 10000

ADVANCED EDIT

SEND

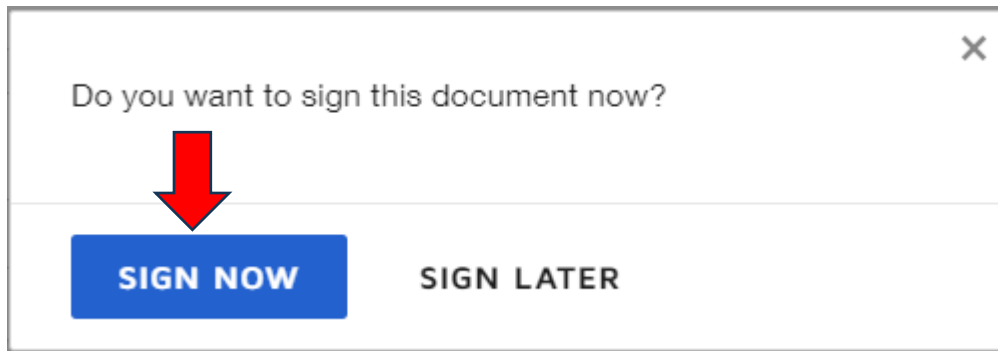


Figure 9

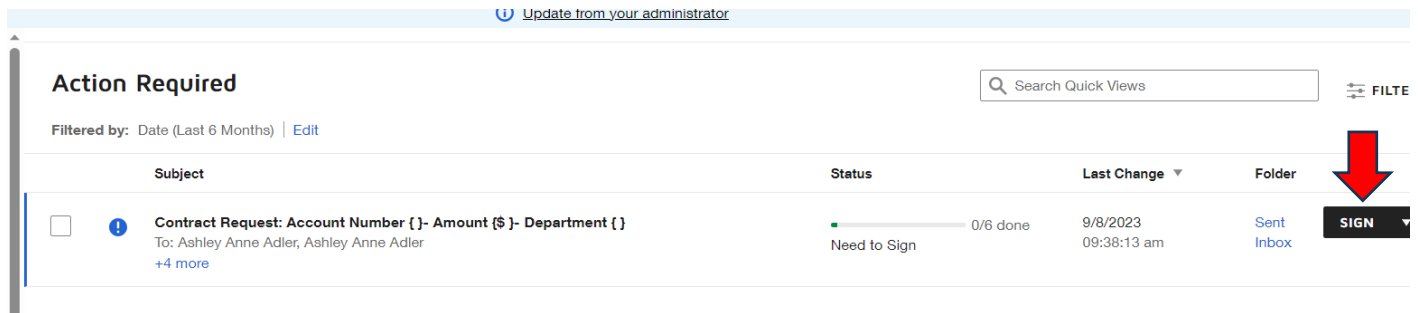


Figure 10

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



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

Vendor Contract - Supporting Documentation for review

Optional

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 Sign 9/8/2023

Department Approval

Grants

Business Manager

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

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

Business Manager

DocuSign - Speaker Contract.docx

1 of 1

FINISH

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)	3200001111
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?	<input checked="" type="radio"/> Yes <input type="radio"/> No
If virtual or hybrid, who will be providing a virtual link?	<input type="radio"/> PNW <input type="radio"/> Speaker <input type="button" value="Optional"/>
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.)?	<input checked="" type="radio"/> Yes <input type="radio"/> 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?	<input type="radio"/> PNW <input checked="" type="radio"/> Speaker
Details of Service	
Details of what the speaker is covering, any materials being distributed by the speaker, and arrival time of the speaker	

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.

Requester
Department Approval
Grants
Business Manager

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Requestor Contact Information
<p>Requestor Name: [REDACTED]</p> <p>Requestor Address: [REDACTED]</p> <p>Requestor City: [REDACTED] Requestor State: [REDACTED] Requestor Zip: [REDACTED]</p> <p>Requestor Phone: [REDACTED]</p> <p>Requestor Email: [REDACTED]</p>

Business Manager Department's Business Manager's Name

Email Address vendor's email - must include the @mail.com

Total Compensation \$ 600 . 00

Details of what the vendor activities will be and/or what is included (for example, inflatable, DJ services, etc.)

Business Manager

ATTACHMENT C – CONSULTANT CONTRACT REQUEST

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 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

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

APPROVALS:

Requester

Department Approval

Grants

Business Manager

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 - 999 - 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) \$. 

Optional - Use if the services extend of several years

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