

PROCUREMENT-RELATED CONTRACTS

ACRONYMS

OGC – Office of General Counsel

OPC – Office of Procurement and Contracting

RAS – Research Administrative Services

WSS – Workday Strategic Sourcing System (formerly known as Scout RFP)

DEFINITIONS

Authorized Signatory – Individual authorized by Howard University to sign contracts

OPC Contract Admin – (OPC Buyer) Is assigned the Sourcing Owner role for the WSS tasks. Throughout this job aid, they will be referred to as **OPC Contract Admin**

Sourcing Owner – The role in WSS that represents the person who owns and is responsible for this particular contract. This role is referenced as the **Contract Admin** in this job aid

Stakeholder – A WSS user who has been assigned access to view the contract data

CONTRACT STATUS

In Progress: OPC Review – Contract is under review by OPC

In Progress: Pending Authorized Signatory Milestone Approval – Request has been sent to Authorized Signatory to approve contract

In Progress: RAS Review – Contract is under review by RAS

In Progress: Supplier Review – Contract has been sent to Supplier to review

Out for Approval – Contract is under review by OGC

Active – Contract is signed and fully approved

CONTRACT INITIATION

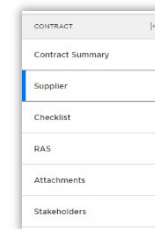
After a requisition is created and the required approvals in Workday are completed, the requisition routes to the OPC Contract Admin. The OPC Contract Admin will be responsible for alerting the requester if a contract is needed.

1. **If Contract is necessary and requester is a registered user in WSS:** Send link to the WSS contract intake form:
https://howard.go.scoutfp.com/new_request/contract/psct



Note: If the requestor is NOT already registered in WSS, have the requester email the WSS Admin to be added

Requester fills in contract data using tabs on the left-hand side of the screen and submits the request



- **Contract Summary**
- **Supplier**
- **Checklist**
- **RAS**
- **Attachments**
- **Stakeholders**

Intake request is routed to the **Contract Manager** who:

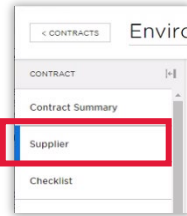
- Verifies procurement usage
- Determines if RAS review is applicable
- **Assigns the OPC Contract Admin the Sourcing Owner role based on the requisition**

2. Verify that the contract status is set to **In Progress – OPC**

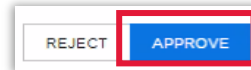


3. Verify contract data has been entered correctly and update as needed (review **Contract Summary, Checklist, Stakeholders, Attachments**, etc.)

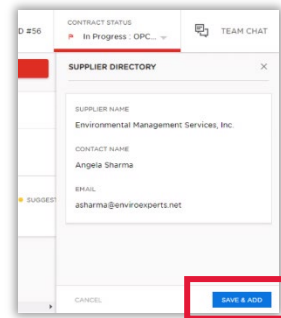
4. Click **Supplier** tab



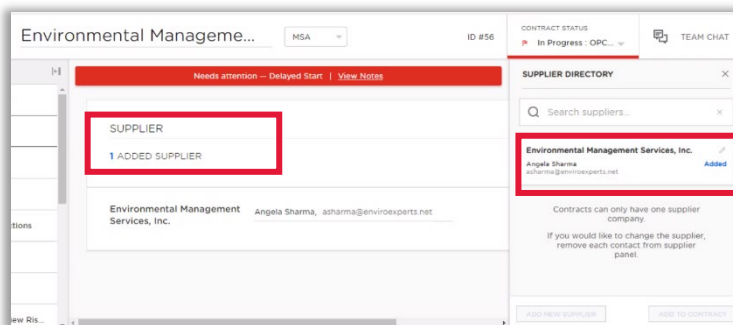
5. Verify Supplier data. Once all the information is correct, click **Approve**



6. Click **Save & Add** to add to supplier database



In the middle of the screen the message **1 ADDED SUPPLIER** displays. On the right, it will say the supplier is marked as added



OPC REVIEW

7. Click on **Attachments** tab and open documents

8. Determine if an HU contract template can be used (recommendation: use the HU contract template)

9. Click the **Contract Admin Actions** tab.

10. Update the contract to fulfill the requirements listed on the **Contract Admin Action** tab.

11. Click the **Attachments** tab. Click  for the document you need to change. Select document to upload and click **Open**

12. Update the filename: add **FOR REVIEW** at the beginning of the name. The version number will be updated when you **Save**

13. If HU contract template is used:

- a. Send to supplier to review via email
- b. Change status to **In Progress: Supplier Review**

14. If HU contract template is not used or upon receipt of the contract review from the supplier via email, determine the OGC routing based on the following:

No OGC Review Required:

- Contract value is < \$60,000 and HU contract template accepted with no changes

OGC Review Required:

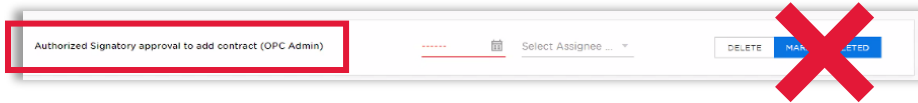
- **Redlines to the HU template:** Request redline changes from supplier as an Addendum to the HU contract template.
- **Contracts > \$60,000**
- **Third-party paper contracts**

15. On the **Contract Admin Actions** tab, select whether OGC review is required or not by answering the question, “Is OGC review required?” The selection will automatically update the contract approval routing

REQUEST AUTHORIZED SIGNATORY REVIEW

16. Click the **Milestones** tab

17. Navigate to **Authorized Signatory approval** milestone
(**DO NOT** click **Mark Completed**. *This needs to be available for the Authorized Signatory to complete*)



18. Assign due date (Recommended: 48 hours)

19. *Please note when information is changed, the milestone will drop to the bottom of the page.*
Navigate to the milestone for **Authorized Signatory Approval**

20. Click **Select Assignee** drop-down menu

21. Type the name of the **Authorized Signatory** and click to select
(**DO NOT** click **Mark Completed**. *This option needs to be available for the Authorized Signatory to complete*)



Note: If the Authorized Signatory name does not populate, you will need to contact the WSS Admin to add the person as a registered user

22. Change status from “In Progress - OPC” to “**In Progress: Pending Authorized Signatory Approval Milestone**”
WSS automatically sends email to Authorized Signatory for approval. Authorized Signatory will click Mark Completed

23. Once Authorized Signatory marks the milestone as completed, (*which replaces Authorized Signatory approval on the legacy Contract Term sheet*) you can move forward with processing the agreement. **For contracts that require OGC Review, do not move forward without OGC approval**

OPC REVIEW CONTINUED

24. Verify the attachments are correct and are ready for OGC Review

25. Change contract status to **Send For Approval**



Note: Contracts that do not need OGC review must still be submitted for approval

If the contract does not need OGC review, ensure the question on Contract Admin Actions Tab regarding OGC review is set to “NO”

26. Click **Stakeholders** tab

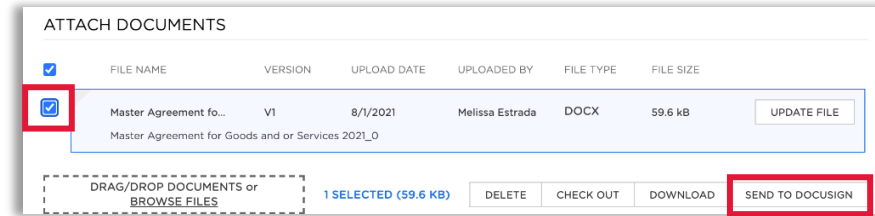
27. The OGC team members required for the review will automatically populate. Give each OGC team member **Read/Write** access then click the **Receive Email Notifications** checkbox



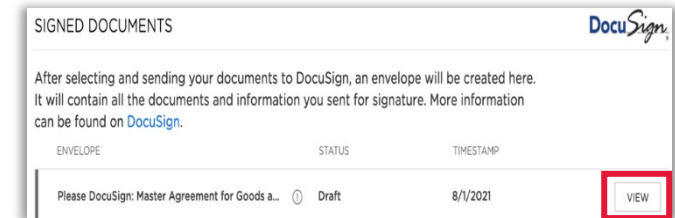
28. As the **Sourcing Owner**, you will get email notifications as the approvals are completed. OGC approval has multiple steps:
- OGC Team Intake Approval
 - OGC Team Legal Memo Submission
 - OGC Approval - VP and General Counsel
29. Once OGC review is completed and the clean contract and legal sufficiency have been loaded into WSS, you can act on the next steps:
- **If the supplier provides additional redlines** that must be reviewed by OGC, re-route for approval:
 - i. change status to **In Progress-OPC**
 - ii. on the attachments tab, upload the new redlines, clearly identified with a version #
 - iii. add a note to OGC in the Team Chat that there are redlines to be reviewed
 - iv. immediately move to **SEND FOR APPROVAL**
 - **If supplier approves** the final version of the contract, you can move forward to request signatures
30. Review legal sufficiency memo to determine if compliance review is required

CONTRACT SIGNATURES

31. Open the **CLEAN** version of the contract from the **Attachments** tab and ensure it is fully ready to go for signatures
32. When the contract is ready for signatures, click the checkbox to the left of the agreement, and then click **SEND TO DOCUSIGN** (If the supplier refuses to use DocuSign, see process on next page)



33. A draft version of the contract DocuSign envelope is created. Click **View** to open



Note: Do NOT add any internal documents. (i.e. the legal sufficiency memo) The supplier will see any and all documents attached in DocuSign.



34. If compliance review is not required, add the supplier and HU signatories in the appropriate order and submit

35. If compliance review is required:

- a. Add the compliance cover page to the envelope
- b. Ensure that the supplier is listed as the first signatory
- c. Add Compliance Review Paralegal as the second Signatory and add their signature flag to the compliance sheet (OGC must review the contract and sign the cover page before it routes to HU Authorized Signatory)
- d. Add HU Authorized Signatory last

36. Once the DocuSign is complete, send a **TEAM CHAT** to the Contracts Manager to perform the final review and approval

Contracts Manager will mark contract as **ACTIVE** (WSS will send a notification to the Contract Admin.) Once contract is active, the requisition can be issued as a PO.

CONTRACTS THAT CANNOT BE DOCUSIGNED:

- If a supplier refuses to use DocuSign:
 - a. Attach the partially executed contract to the **Attachments** tab
 - b. Follow the compliance review instructions (steps 36 – 38)
 - c. Send for remaining HU signatures in DocuSign
- If the contract has been “wet” signed by both parties:
 - a. Upload the fully executed contract to the attachments tab
 - b. **SEND TO DOCUSIGN**
 - c. Add yourself as a signatory that “receives a copy” only
 - d. Click **Submit**

This will ensure the final contract is listed on the appropriate section in WSS for Signed Documents

