

## 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

**RAS Contract Admin** – Assigned the Sourcing Owner role for the WSS tasks. Throughout this job aid, they will be referred to as RAS Contract Admin

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

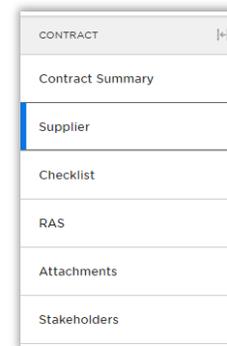
After a requisition is created and completes the required approvals in Workday, it routes to the OPC Buyer. The OPC Buyer will discuss with RAS to determine if a contract is required

1. **If Contract is necessary and requester is a registered user in WSS:** OPC Buyer will send link to the WSS contract intake form: [https://howard.go.scoutfp.com/new\\_request/contract/psct](https://howard.go.scoutfp.com/new_request/contract/psct)



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

2. 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 **Contracts Manager** who:

- Verifies procurement usage
- Verifies RAS review is applicable
- Assigns the **RAS Contract Admin** read/write access on the **Stakeholder** tab



- RAS Team determines the owner of the contract
- Click the **Stakeholder's** tab and assign that person as the **Sourcing Owner**

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

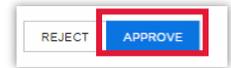


Note: Additional questions are available and must be completed by the RAS Sourcing Owner if OGC Review is required

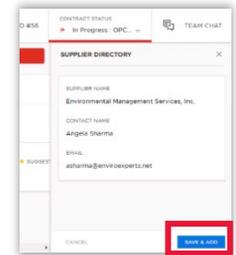
- Click **Supplier** tab



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



- Click **Save & Add** to add to supplier database



- Verify that the contract status is set to **In Progress: RAS Review**

In the middle of the screen the message **1 ADDED SUPPLIER** displays. On the right, it will display the supplier as Added

STAKEHOLDERS			
NAME	EMAIL	PERMISSIONS	
Enter first and last name	Enter email	Select permission ...	CANCEL ADD
STAKEHOLDER	ROLE	E-MAIL	
Melissa Estrada melissa.estrada@howard.edu Last Login: 8/1/2021 @ 1:03 PM	Read/Write	<input checked="" type="checkbox"/> Receive Email Notifications	DELETE
Javacia Harris j_s_harris@howard.edu Last Login: 7/30/2021 @ 2:45 PM	<b>Sourcing Owner</b>		SEND MESSAGE
Dana Hector dhector@howard.edu Last Login: 7/30/2021 @ 2:44 PM	Read/Write	<input checked="" type="checkbox"/> Receive Email Notifications	SEND MESSAGE
Kemorine Wallace k_s_wallace@howard.edu Last Login: 7/30/2021 @ 2:28 PM	Read/Write	<input checked="" type="checkbox"/> Receive Email Notifications	SEND MESSAGE

CONTRACT STATUS	
<b>In Progress</b>	
<input type="radio"/> Canceled	
<input type="radio"/> Terminated	
<input checked="" type="radio"/> <b>In Progress</b>	
<input type="radio"/> Send For Approval	
<input type="radio"/> Approved	
<input type="radio"/> Active	
Mark as:	
<input checked="" type="radio"/> Doesn't Need Atte...	

## RAS REVIEW

10. Click **Attachments** tab and open documents
11. Determine if an HU contract template can be used (recommended that HU template is used)
12. Click the **Contract Admin Actions** tab. Update the contract to fulfill the requirements listed on the Contract Admin Actions tab.
13. Click on the **Attachments** tab
14. Click  for the document you need to replace.
15. Select document to upload and click **Open**
16. Update the filename: add **FOR REVIEW** at the beginning of the name (The version number will be updated when you **Save**)
17. If HU template contract is used, send to supplier to review via email
18. Change status to **In Progress: Supplier Review**
19. Upon receipt of the contract review from the supplier, via email, determine the OGC routing based on the following:

### No OGC Review Required:

- **HU template accepted with no changes:** (and the contract value is <\$60,000)

### OGC Review Required:

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

20. 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

21. Click the **Milestones** tab
22. Navigate to **Authorized Signatory approval** milestone (**DO NOT** click **Mark Completed**. *This needs to be available for the Authorized Signatory to complete*)



23. Assign due date (Recommended: 48 hours)
24. *Please note when information is changed, the milestone will drop to the bottom of the page.*  
Navigate to the milestone for **Authorized Signatory Approval**
25. Click **Select Assignee** drop-down menu
26. 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

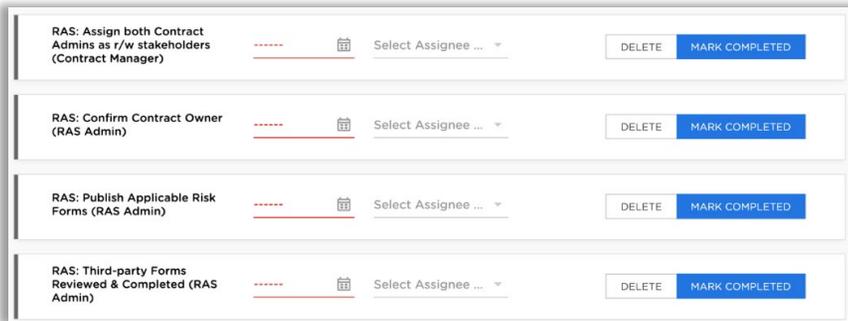
**27. Change status to “In Progress: Pending Authorized Signatory Approval Milestone”**

WSS automatically sends email to Authorized Signatory for approval. Authorized Signatory will click Mark Completed

**28. 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.**

**RAS REVIEW CONTINUED**

**29. Click the Milestone tab. Verify milestones are applicable and follow the steps to assign and complete the tasks. Delete any milestones that are not applicable**



**30. Verify the attachments are correct and are ready for OGC Review**

**31. 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, change question on Contract Admin Actions tab regarding OGC review to “NO”

**32. Click Stakeholders tab**

**33. 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**



**34. 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

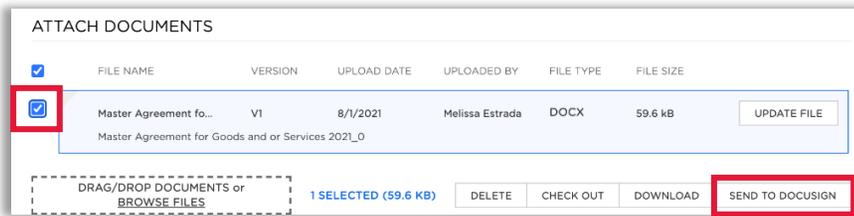
**35. Once OGC review is completed and the clean contract and legal sufficiency have been loaded into WSS, you can act on the next steps:**

- **If the supplier provides additional redlines** that must be reviewed by OGC, you can re-route for approval
  - i. change status to In Progress-OPC
  - ii. on the attachments tab, attach the new redlines, clearly identified with a version #
  - iii. add a note in the **TEAM CHAT** to OGC 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

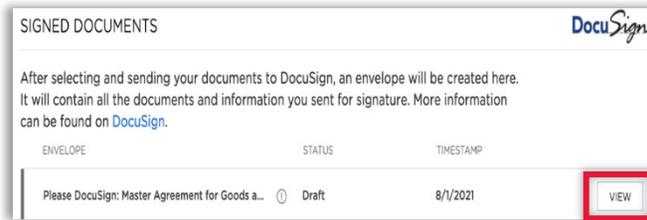
**36. Review legal sufficiency memo to determine if compliance review is required**

CONTRACT SIGNATURES

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



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



- 40. If compliance review is not required, add the supplier and HU authorized signatories in the appropriate order and submit
- 41. 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 her signature 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

- 42. 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 Sourcing Owner) Once contract is active, the requisition can be issued as a PO



**Note: Please ensure OPC Buyer is notified that the contract is active so a Purchase Order can be issued.**

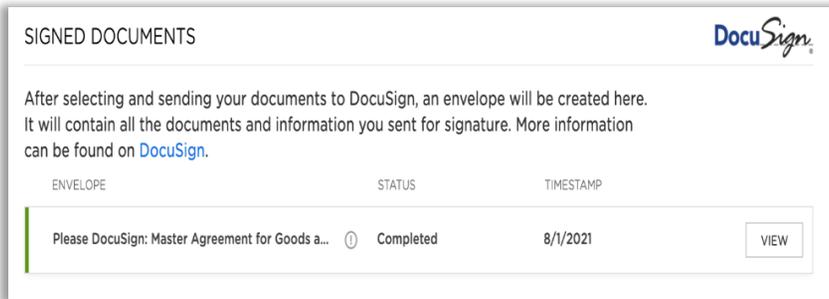


**Note: DO NOT add any internal documents. (i.e. the legal sufficiency memo)** The supplier will see any and all documents attached in DocuSign.

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
  - 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 that the final contract shows on the appropriate section in WSS for Signed Documents



SIGNED DOCUMENTS 

After selecting and sending your documents to DocuSign, an envelope will be created here. It will contain all the documents and information you sent for signature. More information can be found on [DocuSign](#).

ENVELOPE	STATUS	TIMESTAMP
Please DocuSign: Master Agreement for Goods a... ⓘ	Completed	8/1/2021

[VIEW](#)