

DOCUSIGN – CONTRACT REQUESTS

EFFECTIVE: MARCH 19, 2025

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 USING YOUR PURDUE.EDU CREDENTIALS 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 fifteen business days. Additional review time may be required if a proposed agreement is in excess of \$250,000, includes complex terms or if it presents significant risks.

[Instructions for DocuSign Contract Requests](#)

[Instructions for DocuSign Contract Approver](#)

[Academic Affiliation Agreements Request](#)



[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.



[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.



[Professional Services Agreement Request](#)

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



[Software Contract Request](#)

Software contracts are documents executed between Purdue University Northwest and another company for the purpose of granting user(s) the right to install, use, and access software.



[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.

Email: contracts@pnw.edu

Step 2 If signing in through DocuSign from the Purdue OneCampus¹⁵ 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.
- PNW- Software Contract Request – when an organization will grant a user(s) the right to install, use, and access software

Figure 2

The screenshot shows the DocuSign interface. At the top, there is a navigation bar with 'Home', 'Agreements', 'Templates' (highlighted with a red arrow), and 'Reports'. Below this is a dark header with an 'Update from y...' button. On the left, a sidebar menu includes 'ENVELOPE TEMPLATES' with sub-items: 'My Templates', 'Shared with Me', 'Favorites', and 'All Templates' (highlighted with a red arrow). Below these are 'Deleted', 'FOLDERS', and 'SHARED FOLDERS'. The main content area is titled 'All Templates' and features a search bar 'Search All Templates', a 'Date' dropdown, an 'Advanced search' dropdown, and a 'Clear' button. A list of templates follows, each with a checkbox, a star icon, and the text 'Eligible for matching':

- ☆ PNW - Software Contract Request
- ☆ PNW - Professional Services Agreement Request
- ☆ PNW - Consultant Contract Request
- ☆ PNW - Entertainment Contract Request
- ☆ PNW - Speaker Contract Request

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

Figure 4

☆ PNW - Speaker Contract Request ⓘ 👤 🔑

Template ID

USE ←

Recipients

SIGNIN

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 Sign
5	Viewer: Donna K Adelsperger adelsper@purdue.edu	CC 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 – **PLEASE DO NOT ADD ADDITIONAL RECIPIENTS (External or Internal)**

- ✓ The **REQUESTOR FIELD** (Figure 5) will require the requestor’s name and email address (only use @purdue.edu or @pnw.edu).

The **DEPARTMENT APPROVAL FIELD** will require the requestor’s department head’s name and email in the Department Approval field. The requester cannot be the same as the department approver.

Figure 5

The screenshot shows the 'Add recipients' interface with three recipient boxes. Box 1 (Requestor) has 'Name' and 'Email' fields with red arrows pointing to them. Box 2 (Department Approval) also has 'Name' and 'Email' fields with red arrows. Box 3 (Grants) has a 'Signing Group Name' field and a trash can icon with a red arrow pointing to it. Each box has 'NEEDS TO SIGN' and 'CUSTOMIZE' options.

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 three prepopulated recipient entries. Entry 4 (Business Managers Office) has 'PNW Business Office' in the 'Signing Group Name' field. Entry 5 (Contracts) has 'Contracts' in the 'Name' field and 'contracts@pnw.edu' in the 'Email' field. Entry 6 (Viewer) has 'Donna K Adelsperger' in the 'Name' field and 'adelsper@purdue.edu' in the 'Email' field. Each entry has 'NEEDS TO SIGN' or 'NEEDS TO VIEW' and 'CUSTOMIZE' options.

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 are required to be filled out: Account Number, Amount, and Department Name (Figure 7) Complete these fields with details of your request. *Incomplete information will delay processing.*

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



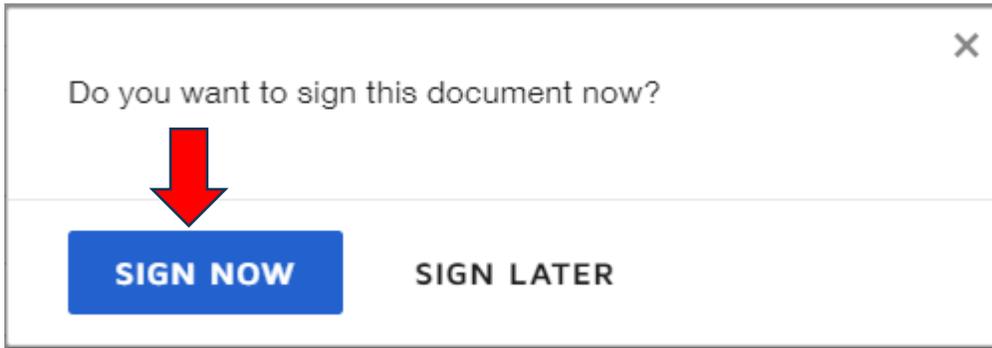


Figure 9

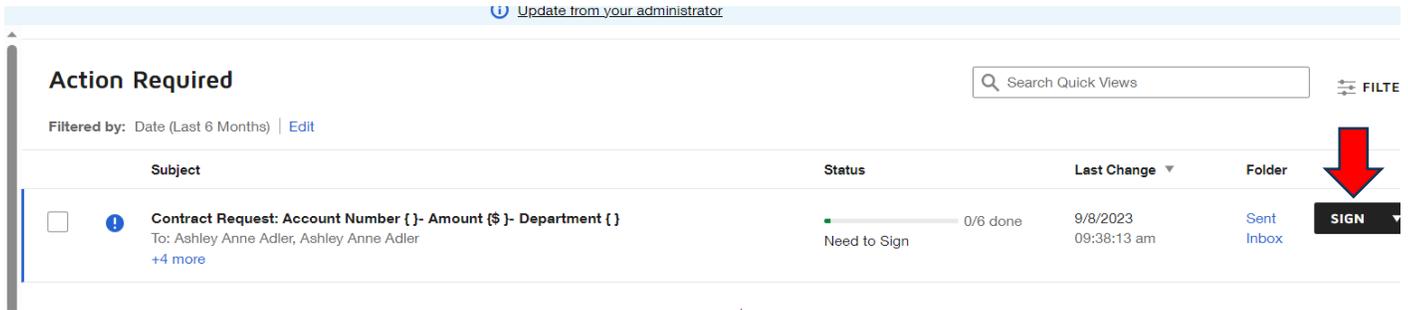


Figure 10

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.

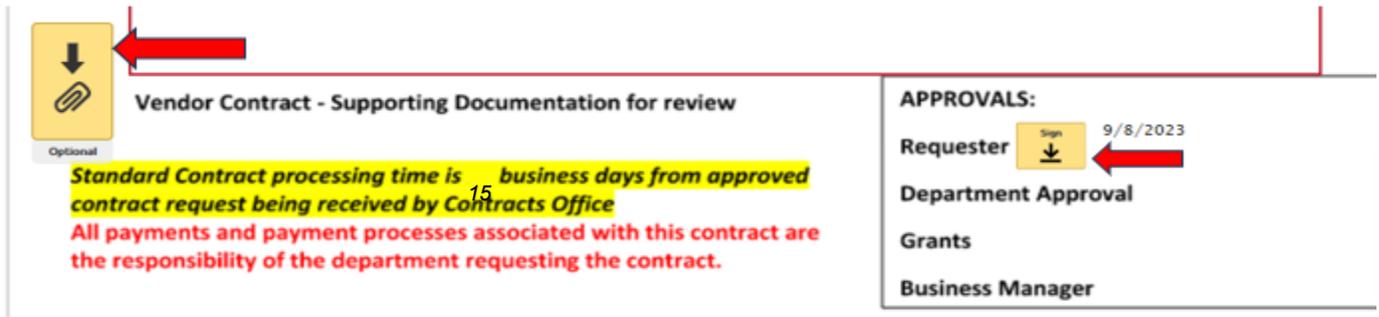
- ✓ Attachment A – Speaker Contract Request
- Attachment B – Entertainment Contract Request
- Attachment C – Consultant Contract Request
- Attachment D – Professional Services Agreement Request
- Attachment E – Software Contract Request

Each request form has required and optional boxes to review and 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 review, approval, and 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 for status on contract request. When you receive a completed DocuSign email – the Contracts department has received the contract request to begin the contract review and will reach out to the requester with any questions regarding the contract request.

Standard contract processing time is 15 business days. If the contract is in excess of \$250,000, has complex terms, or presents significant risks additional time may be required to process contract request.

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) 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? 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

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

ATTACHMENT B – ENTERTAINMENT CONTRACT REQUEST

Entertainment Contract Request

Requestor Contact Information

Name Requestor's name
Department Requestor's department name
Phone/Extension 219 - 777 - 7777 ext. _____
PNW email requestor@pnw.edu
Internal Order Number (Account Number) 3200009999
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 - must include the @mail.com

Contract Detailed Information

Event Name PNW's Event Name
Event Date(s) 1. MM/DD/YYYY 2. _____  optional
Event Location (Campus, Building, Room) Campus - Westville LSF Plaza
Vendor Recommended Arrival Time (Central Time) 02:00 PM
Vendor Performance Start Time (Central Time) 03:00PM
Vendor Performance End Time (Central Time) 06:00PM
Will the University be providing any equipment for vendor use? Yes No
If yes, what will be provided? details of what PNW is providing
Total Compensation \$ 600 . 00

Details of Service &/or Material to be provided

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

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

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 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

ATTACHMENT E – SOFTWARE CONTRACT REQUEST

Software Agreement Request

Requestor Contact Information

Name Requester's Name
 Department Requester's Department Phone/Extension 219 444 4444
 PNW email requester@pnw.edu Internal Order Number (Account Number) 48000007777
 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 (###-###-####) 219 888 8888 Email Address vendorsemail@gmail.com

Contract Detailed Information

Start Date of Agreement 04/04/2025 End Date of Agreement 04/03/2028
 Implementation/One-Time Cost \$ 2500 Annual/Subscription Cost \$ 3500
 Total Cost \$ 13000

- If the total cost (purchase and/or annual cost) is over \$10,000.00 has a Request for Proposal or Special Purchases Form been completed? Yes No
- Has a New Technology Procurement Statement of Purpose Form been submitted? Yes No
 If yes, email final vendor security assessment to contracts@pnw.edu
- Has an Accessibility Review been submitted? Yes No If yes, email approval to contracts@pnw.edu
 If you have not submitted a Security and/or Accessibility Review, go to the following webpage and follow instructions
[Policies, Procedures and Forms - Information Technology - Purdue University Northwest](#)

Reason for Software purchase
 Describe what is being purchased

What function and features of the software will be utilized?
 List the functions and features of the software being used

Who will be the user(s) of the software? List who will use the software (ex. staff, students, vendors, etc.)

Will PNW be sharing any data? Yes No The next field only becomes available if yes is selected

If yes, what data will be shared?
 List any information that will be shared using this software

Vendor Software Agreement - 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 Approved on 3/18/2025
Ashley Anne Adler
 Department Approval
 Grants
 Business Manager

