

Contract Routing Form

Today's Date: _____ Period of Contract: _____ to _____

Requestor's Name: _____ Ext: _____ Department: _____

Supplier (Expenses) /Customer (Revenue): _____ Agreement Type: Expense Revenue

Description/Purpose of Agreement: _____

Total Contract Value: \$ _____ Current Fiscal Year Value: \$ _____ Multi-year Agreement

Cost Center: _____ Gift/Grant: _____ Project: _____

Include with this form: Contract/Agreement and if applicable Competitive bid/quotes OR Purchase Justification Form

Signatures are listed in the order they should be collected

Cost Center Manager reviewed (Required):

Signature Print Name Date

General Counsel reviewed (Required for all contracts including renewals, regardless of amount):

Signature Print Name Date

Purchasing Director reviewed (Required *except* for revenue agreements):

Signature Print Name Date

Provost reviewed (Required for all Academic documents):

Signature Print Name Date

Chief Information Officer reviewed (Required for all Technology purchases):

Signature Print Name Date

Controller reviewed (Required for revenue agreements only):

Signature Print Name Date

Assistant Vice President of Budget reviewed (Required):

Signature Print Name Date

Chief Financial Officer reviewed (Required if total commitment is over \$5,000):

Signature Print Name Date

Edited: April 2022

Form must be completed and approved before a commitment is made to any supplier.
Reference Simmons University Signing Authority for appropriate contract signer.

Additional Signatures

Please use the space below for any desired additional signatures per your individual departmental needs:

| | | |
|--------------------|---------------------|---------------|
| _____ Signature | _____ Print Name | _____ Date |
| _____ Signature | _____ Print Name | _____ Date |
| _____ Signature | _____ Print Name | _____ Date |

NEXT STEPS - After the contract form is fully routed and approved:

For expense agreements,

1. The contract can now be signed by Simmons. Reference the Contract Signing Authority Policy for appropriate signature.
2. Submit a Requisition in Workday to create the Purchase Order to encumber the funds.
- Attach the completed contract routing form, signed contract/quote, any additional documentation to the requisition
3. The Requisition will go through the Workday approval process.
4. After the Requisition is fully approved in Workday, the Purchasing department will send the PO and contract to the supplier
5. Purchasing department will request the fully executed contract from the supplier

If you have any questions about submitting a purchase requisition and/or additional documentation needed, please contact Purchasing at Kelly.williams@simmons.edu or purchasing@simmons.edu

For revenue agreements,

1. Send the completed routing form and all accompanying documents to the Accounting Office.
2. Create a Customer Invoice in Workday. Please attach a copy of the contract in Workday as support for the invoice.

If you have any questions about submitting a customer invoice in Workday, please contact the Accounting Office at Jeffrey.Pinkam@simmons.edu

Contracts and Other Binding Agreements

All faculty and staff should be aware that Simmons has a comprehensive policy governing Contract Signing Review which has been promulgated by the Simmons Board of Trustees.

This policy states unambiguously, in pertinent part, that "[a]greements or contracts may not be entered unless reviewed by University Counsel." Faculty and staff should be aware that they do not have authority to sign contracts/agreements on behalf of their school or Simmons University. Moreover, faculty and staff should be aware that Deans and Vice President each have authority to sign some contracts/agreements but not others. The Contract Signing Authority Policy lists the types of contracts/agreements that Deans and Vice Presidents can sign. If your Dean or Vice President does not have authority to sign a particularly kind of agreement/contract, you will need to obtain the signatures listed on the Contract Routing Form which can be found on the Budget Forms page.

If you have questions about the Contract Routing form, please contact the Budget Coordinator budget@simmons.edu or 617-521-2189

Edited: April 2022

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