Contract Routing Form with Adobe Sign Workflow

Agreements that enter Simmons into a contractual commitment require internal review before the agreement it can be signed by an authorized signer.

The Contract Signing Authority Policy outlines what agreements require pre-approval and who is authorized to sign those agreements on Simmons' behalf. The Contract Routing Form documents these approvals in the precise order required.

In Adobe Sign, custom pre-defined Workflows streamline and automate the Contract Routing Approval Process. Due to the nature of the platform, precision is required so please follow the instructions below carefully.

Step 1: Determine Your Contract's Approval Requirements

In order to determine the correct Contract Routing Workflow and the correct recipients, you need to be able to answer these basic questions about your agreement:

- Agreement Type: Expense or Revenue?

- Who is the correct Cost Center Manager?

- Is Technology Review required?

   Technology must approve all software/equipment related purchases.

- Is Provost Review required?

   Any academic agreement requires Provost approval. Any agreement funded through a Provost reporting department is considered an Academic agreement.

- Who is the correct Authorized Signer?

   See Contract Signing Authority Policy to confirm who is authorized to sign this contract/agreement on behalf of Simmons

If you need help answering these questions, please reach out to the office responsible for the review that you are uncertain of. You may also reach out to the following for assistance:

- Budget– budget@simmons.edu
- Purchasing – purchasing@simmons.edu

Step 2: Find and Select the Correct Workflow

1. Login to AdobeSign. Enter @simmons.edu in the email address field and click Continue to be redirected to the Simmons single sign-on portal to complete login.

2. From the Home tab, under "Send a document for signature", click on the "Start from library" button:
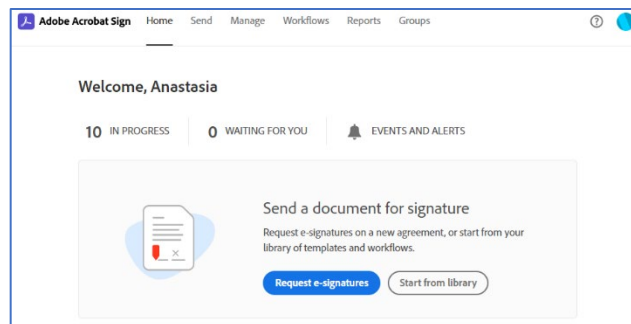
3. In the smaller pop-up window that appears, click on "Workflows":
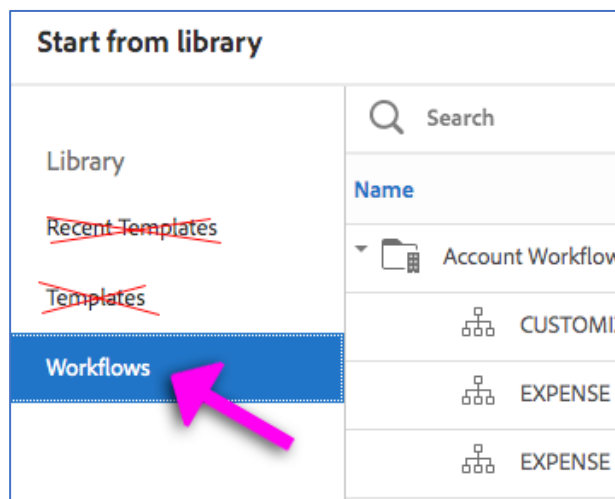
NOTE: Please use the Workflows and NOT the Templates. The Workflows have the routing form recipients configured for you by default.

4. Determine the correct Workflow for your agreement:

If your agreement is an EXPENSE, choose one of the following:

   i. Expense – Contract Routing – Full Review

   For expense contracts/agreements involving software or technology purchased through a department under the Provost.

   ii. Expense – Contract Routing – No Acad No Tech

   For expense contracts/agreements not related to Technology, nor Academics, not requiring Provost approval.

iii. Expense – Contract Routing – No Technology

For academic related expense contracts/agreement requiring Provost review, but not a software or technology purchase.

iv. Expense – Contract Routing – No Academic

For expense contracts/agreements requiring Technology review (any software or technical equipment), but not requiring Provost review.

If your agreement type is REVENUE, choose one of the following:

i. Revenue – Contract Routing – No Academic

For revenue contracts/agreements not requiring Provost review.

ii. Revenue – Contract Routing – Full Review

For revenue contracts/agreements relating to the office of the Provost.

If you are unsure which Workflow is correct for your agreement, please reach out to purchasing@simmons.edu for their recommendation.

5. Select the correct Workflow and click the "Start" button to continue.
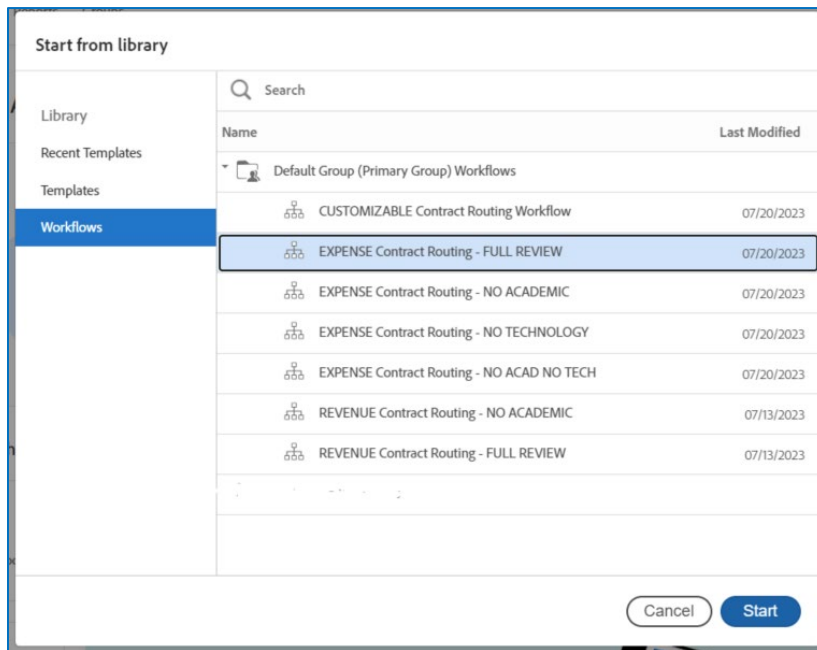
Step 3: Configure recipients, attachments, and fields

1. Scroll up to view all fields from the beginning.

   Under "**Recipients**", most standard recipients will already be pre-filled. Please add the recipient email address to the following fields:

   o Cost Center Manager (*Required*)
   o General Counsel (*Required*)

   Do not leave any *required* recipient fields empty. Leaving recipient fields empty result in incorrect mapping of the signature field assignments.


   > **IMPORTANT NOTE:**
   > The authorized signing of the contract is not a default part of this process. Please request the Authorized Signer's e-signature separately using Adobe Sign's standard features **after** the Contract Routing process is complete. See the Contract Signing Authority Policy to confirm who is authorized to sign the agreement on behalf of Simmons.

2. **Enter any CC's emails, if desired.** These individuals will receive notice that the routing form has been submitted but are not required to sign.

3. **Update the Agreement Name field.** This will be included in the subject line on the email notification your signers receive.

4. **Update the Message field.** This can be a brief description of the agreement and will appear in the email signers receive.

5. **Upload the agreement** and any other required attachments to this Workflow (ex: Contract/Agreement, Purchase Justification Form etc.)

6. Click "Next"

7. At this step, you will review the fields on the form. Fields are not filled in at this time but will be completed in the next step.

   At the top of the form, review the fields assigned to you, the Form Filler. These will be completed by you before the form goes out to signers. If a field does not apply to your agreement, but is starred as required, at this point, you may right click on the field, and delete it the field from the form.
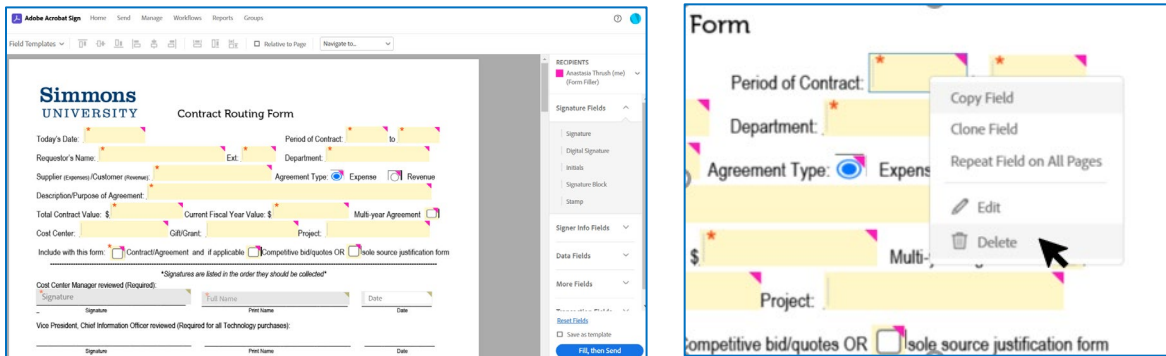
Under "RECIPIENTS" at the top right, you can click through each "Signer" and their assigned fields will be highlighted. Keep in mind that there are certain "Approver" recipients in this Workflow who are not assigned any fields by design.
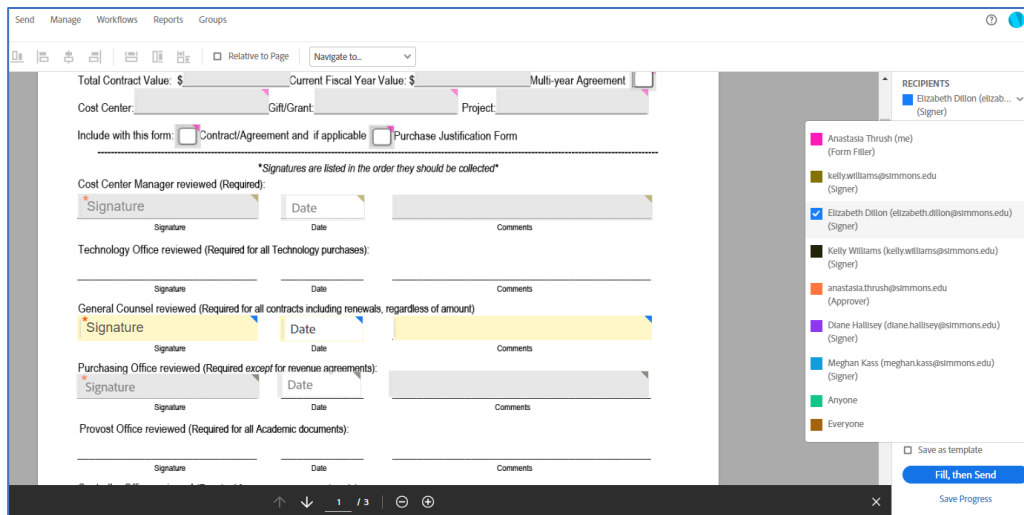
8. When you are finished reviewing and customizing, click **Fill, then Send**
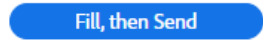
Step 4: Complete the Contract Routing Form

1. Complete the routing form by filling in all information related to your agreement:

Today's Date – Date the form is being submitted

Period of Contract – Include contract start and end date

Requestor's Name– Add requestor's name

Department – Include requesting department name

Supplier/Customer – Add the supplier (for expense agreements) or customer (for revenue agreements) name

Description/Purpose of Agreement - Include a brief description explaining the purpose of the agreement.

Total Contract Value – Include the total contract expense/revenue value of the full contract (ex: a 3-year contract at $10,000 per fiscal year, will have a $30,000 total value)

Current Fiscal Year Value – Include the current fiscal year value

Multi-year Agreement – If contract will span more than one fiscal year, please check this box

Cost Center – Include the relevant cost center funding the agreement

Gift/Grant – If agreement is funded through a gift or grant, add gift/grant name/number

Project – If agreement is funded through a capital project, add project name/number

Check the boxes to confirm you have attached the agreement, and purchase justification form (if applicable).

2. Once all needed fields are completed, click **Submit** to send the form our for signatures

Step 5: Manage progress, changes, and additional resources

Once you submit, the form will move through the approval process in the order listed on the form. You will receive email notice when the contract routing form is completed.

Track Progress

Progress of any request can be tracked in the "Manage" page of your Adobe Sign account.

[For more details, click here for Adobe's instructions about managing and tracking agreements with Adobe Sign.](#)

Communicate Feedback

Commenting and communication between participants of signature processes is currently not possible in Adobe Sign. Please communicate using systems outside of Adobe Sign, such as email, to discuss the agreement.

What if a Signer is Unavailable?

You can't skip or add a recipient, but you can replace them in a limited fashion if the original signer is unavailable or the field was assigned to the wrong signer. Alternatively, you can start over or stop the current signature request and start a new one for the partially signed document. You cannot add or rearrange the fields, nor can signers be assigned to a different field. Please consider one of the following recommended methods based on the scope of your required change.

Replace the current recipient:
- You can replace the current recipient in the "Manage" page of your Adobe Sign account. Directions available [here](#)

Send a new signature request for a partially filled document:

1. Navigate to the "Manage" tab and find your agreement.
2. Click on the agreement and in the "Actions" menu that appears on the right, click "Download PDF" to download the partially signed Contract Routing Form.
3. Click "Send" to create new custom signature request (without the Contract Routing Workflows).
4. Manually add your outstanding recipients and choose their type (Signer or Approver, etc.) by clicking on the icon next to each recipient (Click [here](#) for more info)
5. Attach the required documents and partially the signed Contract Routing Form.
6. Add signature and text input fields, and assign them to the correct recipients. (Click [here](#) for more info)
7. When you are finished reviewing and customizing "Fill, then Send".

> Once the form has been fully routed/fully signed, you will receive email notice from AdobeSign. The contract is now approved for signature.

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Step 6: Signing the Contract/Agreement

Review the Contract Signing Authority Policy to determine who is authorized to sign the agreement on behalf of Simmons.

Use AdobeSign's standard features, to submit the actual contract for signature.

1. Login to AdobeSign. Enter @simmons.edu in the email address field and click Continue to be redirected to the Simmons single sign-on portal to complete login.

2. On the homepage, under Send a document for signature, select "Request e-signatures"

3. On the Recipients line, enter the email address of the Authorized Simmons signer for this contract. If multiple Simmons signers are required, enter all that apply.

4. Update the Agreement Name field. This will be included in the subject line on the email notification your signers receive.

5. Update the Message field. This can be a brief description of the agreement and will appear in the email signers receive.

Get documents signed
Send an agreement to others for e-signing, approval, or other processing.

Send from: Default Group (Primary Group) ▼ ⑦

Recipients *
Complete in Order ⬤ Complete in Any Order   Add Me | Add Recipient Group | ⑦

| 1 | ✍ ⌄ | meghan.kass@simmons.edu | ✉ ⌄ Email | ✕ |
| 2 | ✍ ⌄ | Enter recipient email | | |

Show CC

Message *

Agreement Name

Please review and complete this document.

Files *   Add Files

Drag & Drop Files Here

6. Click Add Files to upload the contract that needs to be signed.

7. Click Next to continue.

8. On the following screen, you will need to assign the needed contract fields to the signer(s).
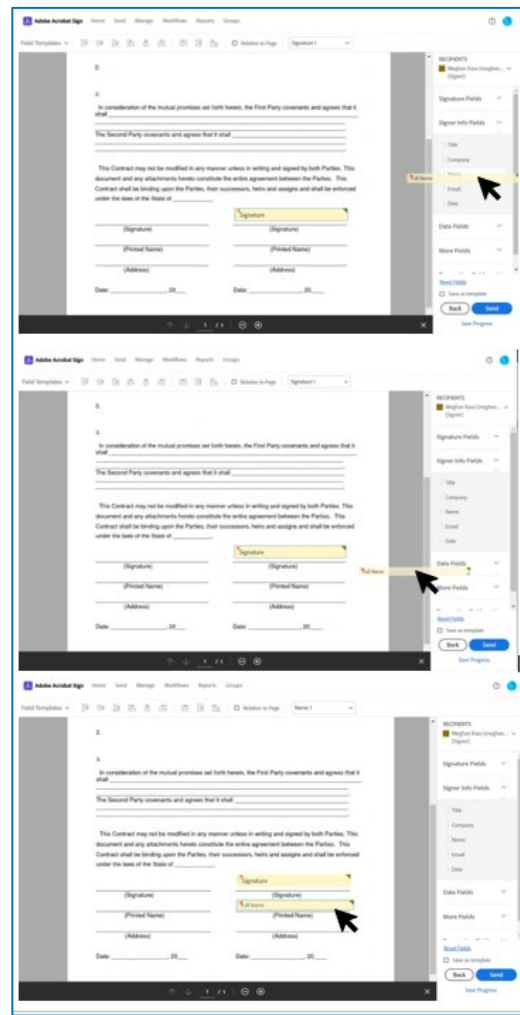

- Select the correct Recipient from the dropdown on the top right (note they are color coded to help identify who is assigned to what field once signatures are placed).
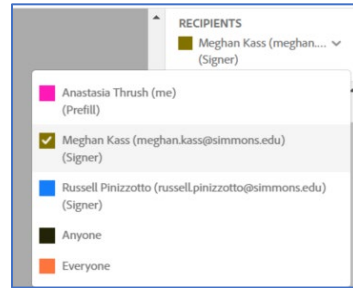
- From the Signature Fields and Signer Info Fields menus on the right, select the needed field, and drag and drop to the correct place on the document.
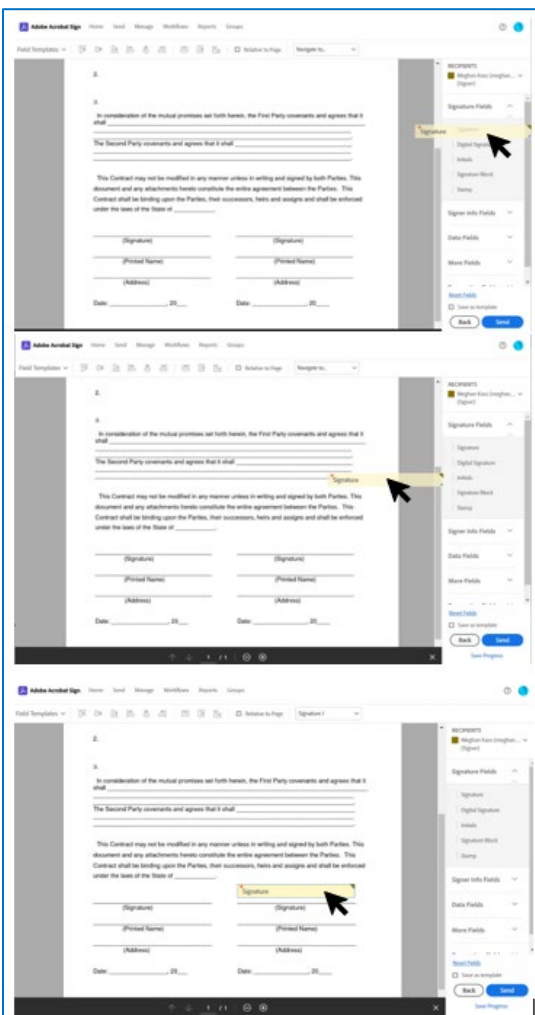
Ex: Placing signature line on document   *Ex: Placing signer name field on document*

9. Continue until all needed fields and signatures have been placed. Then click Send on the bottom right to send the agreement for signature.