Submitting Contracts for Approval and Signatures (Adobe Sign)

Contracts are circulated electronically for approval and signature using Adobe Sign. The sender will be able to track the movement, share with the contract owner(s), and send reminders to those who may have overlooked the contract notification in their Outlook inbox.

Please remember that while it is advisable to start drafting the contract and gathering required attachments early in the process, it is important to ensure that the formal bidding, RFP, or informal quotation process is completed and approved by the Purchase Department, and that any necessary Board approval is obtained before submitting a contract for approval. The Purchase Department will advise of the appropriate steps to take throughout the process.

Please review the Top 5 Reasons Contracts Get Rejected memo (Document Library > Policies & Procedures > Legal) for tips on how to ensure the contract gets approved without unnecessary delays. Most delays can be traced back to mistakes or missing information that cause the contract approval process to restart.

The current checklist and contract templates can be found in the Document Library > Policies & Procedures > Legal Department folder.

Step 1. Complete your Checklist and Contract

- The first page of the contract package will be the checklist which includes a listing of all approvers and signers. The checklist is designed to be “Self-Guided”.
- Please remember to remove all RED INSTRUCTIONS from both the checklist and contract before submitting.
- SECTION III of the checklist outlines all of the documents that are required to be attached to your e-mail:
  a) Board approval (Required if annual spend on this service with all vendors collectively is more than $20,000)
  b) Contract (Always required)
  c) RFP/bid (Required if BPS RFP/bid was issued)
  d) Vendor proposal/quote (Always required)
  e) Explanation of cost difference (Spreadsheet required if the vendor proposal/quote dollar amount doesn’t match what’s on the contract)
  f) Certificate of Liability Insurance (ask vendor for this document)

Step 2. Submit your Contract Package to: bpscontracts@buffaloschools.org

- Submit the checklist, contract, and all necessary attachments listed on the checklist to bpscontracts@buffaloschools.org with the vendor’s name and your department as the subject.
- Once the contract document has been received and uploaded by the Purchase Department, each approver and signer will receive an e-mail from Adobe Sign when it is their turn to approve or sign.
The Purchase Department will send a share link to the contract owner so that they can track the process:

**Adobe Sign**

Attached is your copy of the 1234567 021220 12345 Test Contract

Kelly Mordaunt (Buffalo Public Schools) says:

**Save this e-mail** It will enable you to track the approval history and current standing of this contract.

To view, follow the "Click here to view this document online" link below and wait for the top of the page to load. Please note that it is the responsibility of the contract owner to track and expedite the approval process.

Attached is your copy of the 1234567 021220 12345 Test Contract between kellymordaunt@gmail.com and Kelly Mordaunt, for your records.

**Click here** to view this document online in your Adobe Sign account.

Why use Adobe Sign:

Wait for the page to fully load. Along the top, you will find a scrollable window with the history log:

**View the current standing of your contract here.**

BUFFALO PUBLIC SCHOOLS CONTRACT CHECKLIST

<table>
<thead>
<tr>
<th>SECTION I: General Information</th>
<th>Where applicable</th>
<th>Enter here</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendor Name</td>
<td>Always</td>
<td>Test Vendor</td>
</tr>
<tr>
<td>Vendor Number</td>
<td>12345</td>
<td></td>
</tr>
<tr>
<td>One sentence explanation of contract</td>
<td>Always</td>
<td>Test Service</td>
</tr>
<tr>
<td>Contract Program or Department</td>
<td>Always</td>
<td>Test Department</td>
</tr>
<tr>
<td>Contract Service Location</td>
<td>Always</td>
<td>District Wide</td>
</tr>
<tr>
<td>Contract Amount for THIS contract only if this contract covers multiple years, list amount for each fiscal year (total)</td>
<td>Always</td>
<td>Match section 4b in contract</td>
</tr>
<tr>
<td>Estimated total payments to vendor this fiscal year including this contract and all other contracts/purchases</td>
<td>Always</td>
<td></td>
</tr>
<tr>
<td>Always</td>
<td>$50,000</td>
<td></td>
</tr>
<tr>
<td>Always</td>
<td>$20,000</td>
<td></td>
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<tr>
<td>Always</td>
<td>$2,000</td>
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<tr>
<td>Always</td>
<td>$2,000</td>
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</tr>
</tbody>
</table>

For questions, contact Jennifer LoTempio, Assistant Director of Purchase at jlotempio@buffaloschools.org

Revised 02.12.2020
To Approve a Contract:
You will receive an e-mail from Adobe Sign asking you to approve. Click on the link to open the contract:

The screen to review and approve the contract will look like this:

You can choose to NOT approve by using the drop down menu above, or click the yellow “Start” tab to approve.

Note: If you do not wish to approve because you have a question, it may be wise to call the contract owner (listed first on the checklist) first before you reject it. They may be able to answer your question.

If you need to delegate the approval, you may do so by forwarding the e-mail you received. Doing so grants the recipient the ability to approve in your name.

For questions, contact Jennifer LoTempio, Assistant Director of Purchase at jlotempio@buffaloschools.org

Revised 02.12.2020
If you are ready to approve, Click to Approve:

You will be prompted to type your name:

To Sign a Contract:
You will receive an e-mail from Adobe Sign asking you to sign. Click on the link provided to open the contract:

After you have scrolled through the materials and are ready to sign, click on the yellow tab.

For questions, contact Jennifer LoTempio, Assistant Director of Purchase at jlotempio@buffaloschools.org

Revised 02.12.2020
Note: If you are not ready to sign, call the contract owner (listed first on the checklist) before you reject the contract. They may be able to resolve any concerns that you have. After you have scrolled through the materials and are ready to sign, click on the yellow ‘Start’ tab.

You will be prompted to sign:

There are 4 ways to sign the contract: Type, Draw, Image or Mobile. Click on the method you wish to use.

**Type:** Simply type your name in the box.

**Draw:** Use your mouse to draw your signature.

**Image:** Scan or snap a picture of your signature and follow the prompts to import it as an image.

**Mobile:** Enter your mobile phone number to receive a message from Adobe Sign with a link to a screen where you can draw your signature with your finger or stylus. It will immediately be imported onto your computer screen when you’re done.

After you sign, click Apply.

Type your name at the prompts, and Click to Sign. You are finished.