

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:



Attached is your copy of the 1234567 021220 12345 Test Contract

BUFFALO PUBLIC SCHOOLS CONTRACT CHECKLIST		
SECTION I: General Information:	Where applicable:	Enter here:
Vendor Name	Always	Test Service
Vendor Number	Always	12345
One sentence explanation of contract	Always	Test Department
Contract Program or Department	Always	District Wide
Contract Service Location	Always	09/01/19 -- 08/31/20
Contract Date Range	Always	
Contract Amount for THIS contract only. If this contract covers multiple years, list amount for each fiscal year (rare).	Always Must match section 4b in contract	\$50,000
Estimated total payments to vendor this fiscal year including this contract and all other contracts/purchases	Always Enter ">\$20,000" if the total exceeds \$20,000.00	>\$20,000

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."*

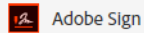
Attached is your copy of the 1234567 021220 12345 Test Contract between kellymordaunt@gmail.com and Kelly Mordaunt, for your records.

[Click here](#) to view this document online in your Adobe Sign account.

Why use Adobe Sign:

To track your contract, follow the "Click Here" link provided in the e-mail.

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



Home Send Manage Reports

1234567 021220 12345 Test Contract 17 pag...

Manage Agreement Audit Report

From: Kelly Mordaunt (Buffalo Public Schools)
 To: kellymordaunt@gmail.com
 Date: 02/12/2020, 1:42 PM
 Status: Out for e-signature
[Replace Signer](#) [Upload a signed copy](#)
 Message: Please review and complete 1234567 021220 12345 Test Contract.
 Expiration date: [Add](#)

View the current standing of your contract here.

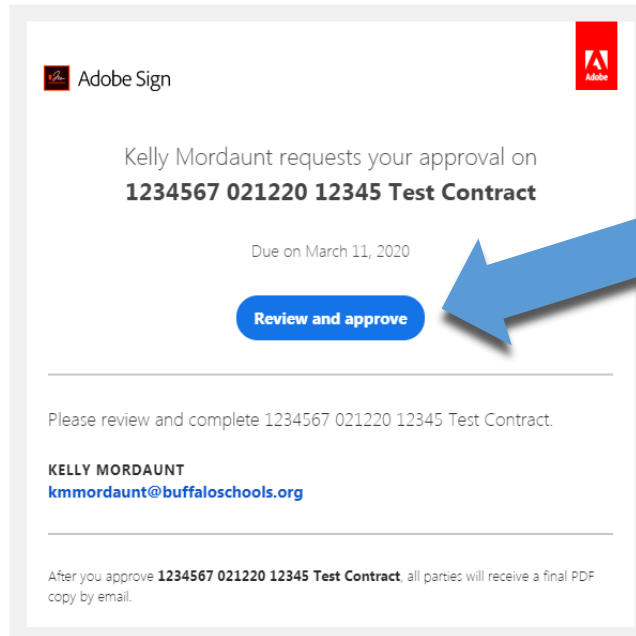
- Document shared with Kelly Mordaunt (kmmordaunt@buffaloschools.org) Feb 12, 1:51 PM
- Waiting to be signed by kellymordaunt@gmail.com [Replace Signer](#) [Upload a signed copy](#)

BUFFALO PUBLIC SCHOOLS CONTRACT CHECKLIST

SECTION I: General Information:	Where applicable:	Enter here:
Vendor Name	Always	Test Vendor
Vendor Number	Always	12345
One sentence explanation of contract	Always	Test Service
Contract Program or Department	Always	Test Department
Contract Service Location	Always	District Wide
Contract Date Range	Always	09/01/19 -- 08/31/20
Contract Amount for THIS contract only. If this contract covers multiple years, list amount for each fiscal year (rare).	Always Must match section 4b in contract	\$50,000
Estimated total payments to vendor this fiscal year including this contract and all other contracts/purchases	Always Enter ">\$20,000" if the total exceeds \$20,000.00	>\$20,000

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:

SECTION I: General Information:	Where applicable:	Enter here:
Vendor Name	Always	Test Vendor
Vendor Number	Always	12345
One sentence explanation of contract	Always	Test Service
	Always	Test Department
	Always	District Wide
	Always	09/01/19 -- 08/31/20
	Always	\$50,000
	Must match section 4b in contract	
this fiscal year including this contract and all other contract purchases	Always	>\$20,000
Funding Source (fund number)	Always	XXXXXXXXXXXX
	Must match section 4a in contract	
Was this contract previously rejected?	Enter "No" or list reason:	No
Has a requisition been created?	Always	Requisition #XXXXXXXXXX
SECTION II: Approvers and Signers:	Where applicable:	List name and e-mail address below:
1) Contract Owner (BPS employee)	Approve - Always	[Name] [E-mail address]
2) Office of Shared Accountability	Approve - Instructional services only	Dr. Genelle Morris gmorris@buffaloschools.org
3) Director of Purchase	Approve - Always	Richard Fanton rfanton@buffaloschools.org
4) Vendor	Sign - Always	[Name] [E-mail address]
5) General Counsel	Sign - Always - Approve as to form	Nathaniel Kuzma legal-contracts@buffaloschools.org

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.

If you are ready to approve, Click to Approve:

3) Director of Purchase	Approve - Always	Richard Fanton rjfanton@buffaloschools.org
4) Vendor	Sign - Always	[Name] [E-mail address]
5) General Counsel	Sign - Always - Approve as to form	Nathaniel Kuzma legal-contracts@buffaloschools.org
6) Division Head	Approve - Always	[Name] [E-mail address]

I agree to the [Terms of Use and Consumer Disclosure](#) of this document

Click to Approve

You will be prompted to type your name:

Adobe Sign

Alternative actions ▾

Enter Your Information

Please enter your name and then click to approve this document.

Name

Cancel Approve

Type your name in the box and click "Approve"

You are finished. Adobe Sign will send a final e-mail with the fully signed contract once everyone on the list has approved and signed.

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:

Adobe Sign

Alternative actions ▾

1234567 021220 12345 Test Contract

Next required field 2

Read agreement

I will not e-sign

Clear document data

View history

Download PDF

CONTRACT CHECKLIST

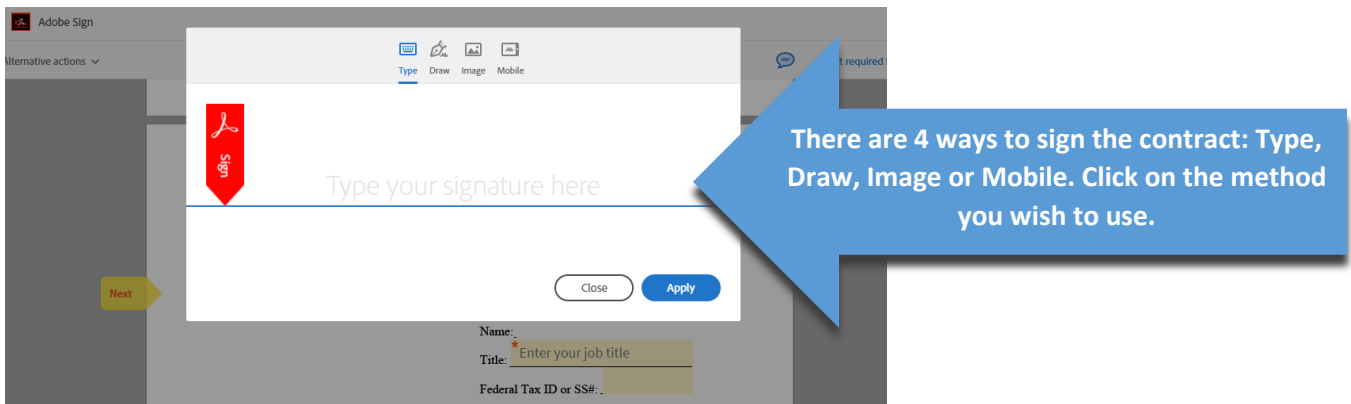
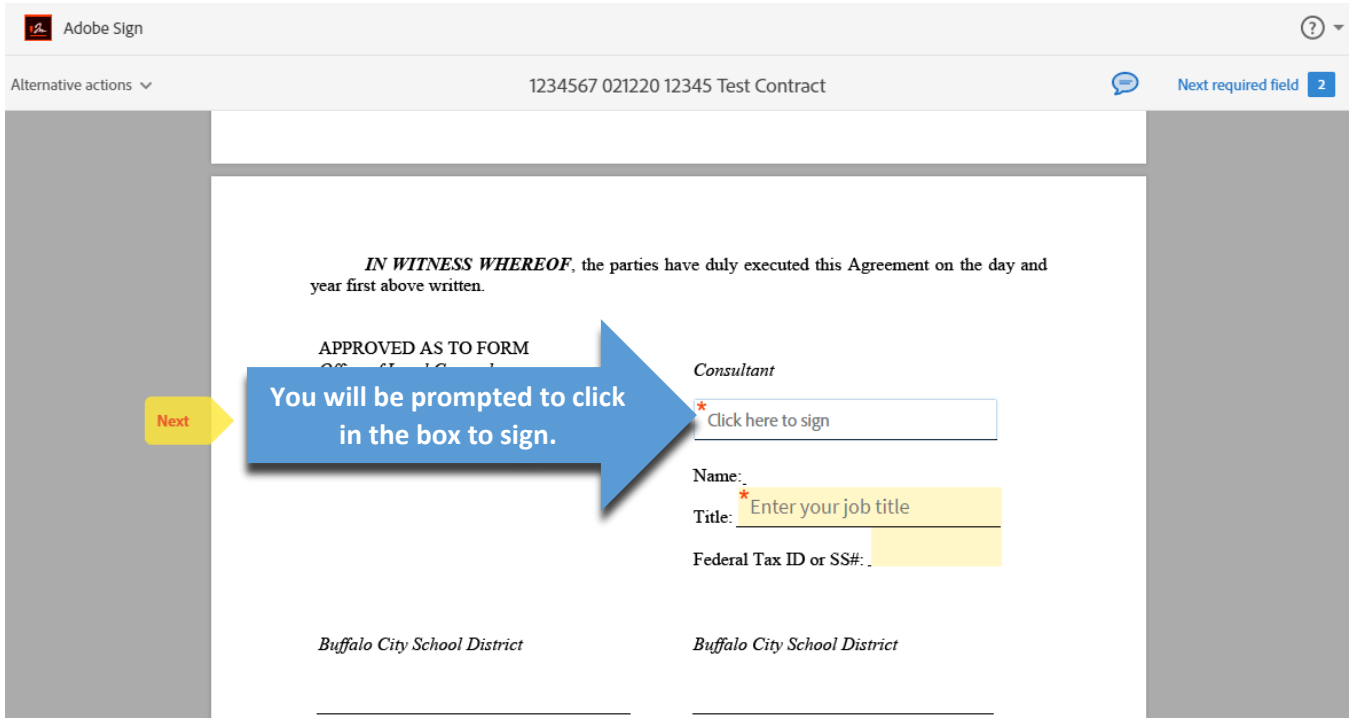
		Enter here:
Vendor Name	Always	Test Vendor
Vendor Number	Always	12345
One sentence explanation of contract	Always	Test Service
Contract Program or Department	Always	Test Department
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Contract Date Range	Always	09/01/19 -- 08/31/20
Contract Amount for THIS contract only. If this contract covers multiple years, list amount for each fiscal year (rare).	Always Must match section 4b in contract	\$50,000
Estimated total payments to vendor this fiscal year including this contract and all other contracts/purchases	Always Enter ">\$20,000" if the total exceeds \$20,000.00	>\$20,000
Funding Source (fund number)	Always Must match section 4a in contract	XXXXXXXXXXXX
Was this contract previously rejected?	Enter "No" or list reason:	No
Has a requisition been created?	Always	Requisition #XXXXXXXX
SECTION II: Approvers and Signers:	Where applicable:	List name and e-mail address below:

Start

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

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:



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.

