

Submitting a Contract Request Form

1. Before you begin

Make sure you have the following on hand:

- The name of the counter-party (supplier, vendor or partner) and their legal entity (if applicable) along with the name and email address of the individual who is authorized to sign for the counter-party.
- Key contract details: start date, end date (term), contract value or budget, description/purpose of the contract.
- Relevant supporting documents (e.g., Statement of Work, pricing schedule, contract details and or any additional attachments).
- (Optional) Existing supplier record in Coupa, or whether this is a new supplier requiring onboarding.

2. Accessing the Contract Request Form

1. Log in to Coupa.
2. Navigate to the menu where “Contract Request” is listed. Select the **Contract Request Form**.
3. If there’s a “Save as Draft” option, feel free to save and come back later if you need to gather more info.

3. Completing the Form – Field-by-field guidance

Below is a typical breakdown of the fields you’ll encounter and how to fill them. Adapt to your form.

Field	Guidance
Contract Owner	Input the name of the Brandeis employee who will oversee the work of this agreement.
Services Description	Provide details of what is being purchased or delivered under the contract (e.g., consulting services, software subscription, hardware support).
Start Date	Choose the date when the contract becomes effective.
End Date (Term)	Choose the expiry date or indicate “Ongoing”.

Field	Guidance
Funding Source	Select which funding source this agreement will be charged to.
Contract Total / Budget	Enter the total contract value or budgeted amount (e.g., USD 100,000) and currency. If not fixed, indicate an estimated total for the services.
Contract Type	Select the category (e.g., Master Services Agreement, Independent Consultant Agreement, etc) if unknown please select Other/Unknown.
Attachments	Upload any draft contracts, SOWs, pricing sheets, vendor proposals, or other relevant documents.
Supplier/Consultant Name	Input the name of company or individual. If the supplier is not yet in Coupa, please select “AP to Update” so that the request triggers onboarding in parallel.
Supplier Legal Name	Input legal name only if “AP to Update” was selected.
Main Contact	Provide name of main contact(supplier) who you will be working with.
Main Contact Email Address	Provide email address of main contact(supplier).
Main Contact/Signer	Indicate if main contact will also be the authorized signer.
Comments / Additional Notes	Use this space to provide any additional information or context which would be helpful to share.

Once all required fields are completed (look for red asterisks or required-field indicators), click **Review**, after confirming all details provided, you will have an opportunity to add any additional approvers, and or watchers to the Approval Chain for the Contract request form. Once confirmed that information is accurate select **Submit**.

Note: Approval of this form does not constitute approval of the actual contract. This approval indicates authorization to begin the contract review and request process only. Final contract and execution will occur after all required reviews and approvals are complete.

4. After submission

- If any required information is missing, the form may be returned to you for completion—address the comments promptly.
 - You can monitor the status of the request in Coupa (look for a “My Forms” section).
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5. Approved Contract Form

Once the Request Form has been approved, the Procurement and Contract Management team will initiate the next phase of the contracting process. This phase includes the following steps:

- **Contract Review or Creation:** Review the vendor’s proposed agreement and/or prepare a new Brandeis University agreement as needed.
- **Departmental Review:** Collaborate with the Offices of General Counsel, Information Technology Services, Communications, Risk Management, and any other relevant departments to obtain required reviews and approvals.
- **Negotiation and Revisions:** Coordinate with the vendor to address any requested modifications or changes to the agreement.
- **Execution:** Once all reviews and approvals are complete, the finalized agreement will be routed for signature via Adobe Sign to the authorized signatories for both the vendor and Brandeis University.
- **Publication and Next Steps:** After the contract has been fully executed and published in Coupa, the corresponding requisition may be initiated.

Checking Contract Status in Coupa:

Users can track the status of their contract directly in Coupa by navigating to the Activity Page and selecting Contracts..

- From the Coupa homepage, hover over your name or picture in the upper right hand corner. Select Activity, and then Contracts.
- Use the View Drop Down to select My Documents, Active Reviews, or That I am Watching to filter the results accordingly.
 - The Active Reviews View will show which departments may be collaborating on the agreement at that time. (i.e. OGC, ITS, Comm’s, Risk etc.)
- Users will also be able to click into the agreement to review the current Status of the Agreement. The status bar will indicate the current stage
 - In Review (contract is in progress being reviewed with internal or external parties)
 - Pending Approval (after all internal and external parties have agreed to any necessary changes, contract will be submitted for internal Procurement approvals)

- Approved (Contract has been approved and is being prepared to be sent for signature).
- Pending Signature (Signatures have been requested by both the relevant Counterparty and appropriate authorized signatory for Brandeis via AdobeSign)
- Completed (all Signatures have been obtained)
- Published (contract is finalized and published)

If you have questions regarding your contract's progress or need assistance, please contact **procurement@brandeis.edu**