

Contract Request Form (CRF)



Contract Request Form – When to submit

If you have an unsigned contract that needs to be negotiated and signed by the correct authorized signatories of BU, submit a **Contract Request Form (CRF)** in **Guided BUYing**.

These forms are routed to Procure to Pay (P2P) for review.

The image displays the Guided Buying interface. On the left, a sidebar shows three 'Custom form' options: 'Contract Request Form', 'Supplier Request Form', and 'Sourcing Request Form'. The 'Contract Request Form' is highlighted with a red box. Below each option is a question: 'Do you need a contract facilitated WITH or WITHOUT a supplier registration?' for the CRF, 'Do you need a supplier registered WITHOUT a contract facilitated?' for the SRF, and 'Do you need assistance with soliciting proposals or competitive bids from qualified suppliers?' for the SRF.

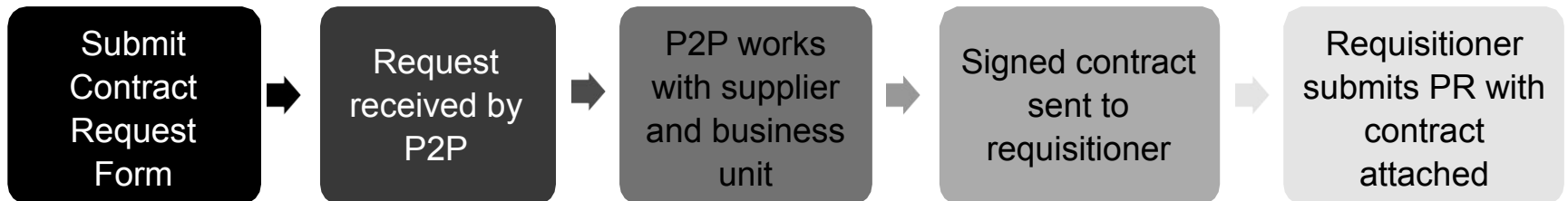
The main area shows the 'Contract Request Form' details. The form includes fields for 'Title' (required), 'Requester Name' (Erika Lonardo), 'Requester Email' (elonardo@bu.edu), 'Contract Description' (required), 'Commodity code' (Please select), 'Supplier' (Please search and select if in list), 'Contract Amount' (USD - US Dollar), 'Desired Contract Execution Date' (MM/DD/YYYY), and 'Account category to be charged' (Cost Center, Internal Order, WBS Element). The form also includes a 'Cancel' button, a 'Save' button, and a 'Submit' button. A note at the bottom states: 'For Contract Requests and per Uniform Guidance, all federal grant orders ≥\$10,000 must include competitive bid documentation. For all non-federal grant orders, please attach bid documentation, a quote, contract and/or a description of services. If nothing is available, please upload a blank document.'

Contract Request Form – Process to route a contract

Please submit the CRF to engage P2P as early as possible. Ideally, submit the CRF as early as the planning stage; the process takes time and is largely dependent on the supplier's responsiveness.

Please allow a **minimum of 2 weeks** for negotiation with the supplier and General Counsel.

Process to Route a Contract



Contracting Process

Identify Need, Budget, Deliverables, Supplier	Submit Contract Request Form	Negotiate and Execute Contract	Implement and Store in Contract Database
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Typical Timing: 2-6 Weeks

Key Activities

Document Initial Scope

- Project summary
- Deliverables
- Time-frame
- Budget (**never share with suppliers**)
- Project owners

Identify Suppliers: *

- Existing suppliers
- Formal bid
- New suppliers
- Compare pricing

Select Supplier:

- Determine supplier
- Engage supplier for availability

Submit Contract Request Form:

- Complete form providing as much detail as possible and attach unsigned contracts \pm .

Author Contract:

- Review Contract Request Form
- Determine best contracting method (i.e., Agreement Type)
- Clarify questions with department
- Author contract

Negotiate Terms & Conditions:

- Send contract to supplier
- Negotiate changes revisions
- Coordinate with contract specialist

Execute Agreement:

- Prepare contract for execution
- Contract signed by authorized BU signatory
- Send copy of executed contract to supplier and requisitioner

Implement and Store:

- Approve form and send signed contract to requisitioner.
- Requisitioner create PR and attach signed contract.
- Upload contract in P2P contract database

* P2P Supplier Discovery services available

Deliverables

- Description of Deliverables
- Approved Budget

- Selected 'Awarded' Supplier

- Contract Request Form

- Executed Contract

- Purchase Requisition

\pm Trustees of Boston University and delegates are the only individuals authorized to sign contracts on the University's behalf.



What's in a Contract?

The contract defines the engagement, transaction, or relationship between two or more parties. *If it is not in the contract, it may not be enforceable.

Contract Requirements – Terms to consider in a contract ±

- Price (e.g., promised discounts)
- Payment terms (e.g., paying only if product/service functions as promised)
- Data Protection (e.g., Data Security, HIPAA, FERPA)
- Risk mitigation if something goes wrong (e.g., Indemnification, Liability, Warranties, Insurance)
- Contract timeframe and termination (e.g., termination conditions)
- Assignment of responsibilities



* Trustees of Boston University and delegates are the only individuals authorized to sign contracts on the University's behalf.

± This example is intended to demonstrate considerations in the contracting process only, and does not fully reflect all contract considerations or Boston University's policies or processes.

Criteria for Submitting a Contract Request Form

Please reference the list below when submitting a Contract Request Form.

This list includes some of the special risks that may require P2P review. If you are unsure, please submit the Contract Request Form.

- Long-term engagement of services with supplier
- Engaging a new supplier for services
- Fabrication of materials or development of software
- Supplier provides their own agreement*
- Student information
- Personally identifiable information (PII such as social security numbers, financial account information)
- Protected health information (PHI)
- Involves minors
- Speaker or performer
- Student travel
- Legal counsel and auditors
- Design (architect or engineer) and construction



*P2P and University Counsel will decide whether to use the supplier's agreement or Boston University's Terms & Conditions.

Completing and Submitting a Contract Request Form

Contract Request Form – Access via Guided **BU**ying

To access the Contract Request Form, open [Guided **BU**ying](#) and locate the Custom form tiles on the homepage.

The screenshot shows the Guided Buying homepage. At the top is a dark blue header with the Boston University logo and the text "Guided Buying". Below the header is a search bar with the placeholder text "Find goods and services". Under the search bar are four tabs: "Shop", "Your favorites", "Your requests", and "Your approvals". The main content area features three "Custom form" tiles. The first tile, "Contract Request Form", is highlighted with a red box and a red circle with the number 1. The second tile is "Supplier Request Form" and the third is "Sourcing Request Form". To the right of these tiles are three more options: "Request a non-catalog item", "Request on behalf of", and "Buy with a team". Below these options is a "Recent requests" section. The bottom of the page shows a partial view of the same tiles, with the "Contract Request Form" tile again highlighted with a red box and a red circle with the number 2.

1 Locate the Custom form tiles on the Guided **BU**ying homepage.

2 Select Contract Request Form

Contract Request Form – Complete form and address all required fields

Complete the Contract Request Form.

- Your name and email address will auto-populate into the request.
- Required fields are indicated with a red asterisk.

Special Instructions:

3 Title and Contract Description:
Enter supplier's name as the **Title** and provide detailed information on the engagement.

4 Commodity Code:
Type a keyword in the field next to **Commodity Code** and select the most relevant code

5 Supplier:
Click the field next to **Supplier** to search for and select the supplier.

Contract Request Form New Cancel Save Submit

Please use this form to submit a contract to be reviewed and negotiated by Sourcing and Procurement. Note, all contract requests require a minimum of 2 weeks for negotiation and is dependent on the responsiveness of the supplier.
Enter the supplier name as the title below.
NOTE: COMMENTS WILL NOT SEND EMAILS. EMAILS ARE SENT ON APPROVAL OR DENIAL ONLY. PLEASE CHECK BACK TO SEE COMMENTS.

Title *
Vont LLC

Requester Name Erika Lonardo
Requester Email ipoole@bu.edu
Requester Phone Number * 617-353-2370
Contract Description * Our department is engaging Vont to help us edit documents. The dates of engagement are 5/20/21 - 9/16/21.

Commodity code *
Please select
consulting
(None)
SERVICES-CONSULTING

5 Supplier (Please search and select if in list) 🔍 🔗

Vont LLC (0010000515)

Vont LLC (0010000515)
Name
Vont LLC
ID
0010000515
[More info...](#)

Contract Request Form – Provide detail and select supplier

Provide as much detail as possible in the Contract Request Form.

If you cannot find the supplier in step 5, select “No” and provide the name and contact information of the supplier.

The screenshot shows a web form for submitting a contract request. Red boxes and numbered circles (6-10) highlight specific fields and instructions:

- 6**: Points to the "Supplier (Please search and select if in list)" dropdown menu, which currently shows "Vont LLC x".
- 7**: Points to the "Supplier Contact Name" and "Supplier Contact Email" text input fields. The name is "Joe Smith" and the email is "jsmith15@vontllc.com".
- 8**: Points to the "Contract Amount" field (150,000) and the "Desired Contract Execution Date" field (03/23/2021).
- 9**: Points to the "Please select the Cost Center, Internal Order or WBS Elements" section, specifically the "Cost Center" dropdown which shows "1519980001 x".
- 10**: Points to the "Unsigned Contract, Bid Documentation, or other documents" section, which includes an "Upload file" button and a preview of a document titled "Vont Consulting Propo... x".

Below the form, there is a red-bordered box containing the Boston University logo.


Special Instructions:

- 6** Note if you found the supplier in step 5. If not, select “No” and enter new supplier details.
- 7** Provide supplier contact details.
- 8** Enter the **Contract Amount** and select the **Desired Contract Execution Date**.
- 9** **Accounting:** Select the **Account Category** and **Cost Object**.
- 10** Upload supporting documentation (e.g., unsigned contract, quote, description of services).




Contract Request Form – Submit and view status




Finish the required fields and click **Submit**. View the status of submitted forms in the “Your Requests” tab on the **Guided BUying** home page. Open the form to view any comments added.

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Approval 

Changes to the form may affect the approval process. Click the refresh icon to see the most current process.

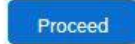
  

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Your form 'CR19 - Contract Request Form' has been submitted!



Note: Communicate with P2P using the comment section of the form. Comments do not generate emails. Please check back to see comments.

Special Instructions:

- 11** View the approval workflow.
- 12** Click **Submit** and view confirmation.

Next Steps:

The Contract Request Form is sent to P2P.

After the contract is negotiated and signed, you will be instructed to submit a PR.

Please allow a **minimum of 2 weeks** for negotiation with the supplier and General Counsel.