

UNIVERSITY OF NEBRASKA **UNK** KEARNEY

DocuSign Training

Expense Contracts

Business Services & Payment Services

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Need for Contracts

UNK

- Required for all agreements that involve the signatures of two or more parties, provide services of any type, or require acceptance of terms and conditions
- Not required for documents that are simply for purchase of products or a pricing agreement
 - Utilize an eSHOP Purchase Order (PO) or Direct Pay for these instances
- If questionable, contact Business Services or Payment Services for direction

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DocuSign Program

UNK

- Secure, web-based system which obtains signatures and information electronically via email
- Approved by and meets all requirements of OneIT, the State of Nebraska, and the IRS
- All expense contracts and agreements will be processed through the DocuSign system (effective July 1, 2020)

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Get Started with DocuSign



- Initiate contract process by emailing contracts@unk.edu with the following information:
 - In or out-of-state provider
 - Other unique details or questions
- Call Business Services for questions on contracts with foreign vendors, vendor-provided contracts, or IT/app contracts
- Email will be sent to the requestor to begin the DocuSign process

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Michael Christen
chrismc2@unk.edu

Please complete the required fields and all optional fields, as needed, within the Standard Agreement template. All details including a "Description of Services" and "Payment" within Exhibit A must be completed. Once completed and submitted, Business Services and/or Accounts Payable will complete the contract execution and contact you if any other information is needed.

Please utilize the information on the completed agreement, which you will receive via email after all signatures have been obtained, to submit a payment transmittal for each payment associated with the agreement. If you have any questions regarding this procedure, please contact Business Services at contracts@unk.edu or (308) 665-8448.

Powered by DocuSign

Need -to-Knows

- Need vendor contact information
- Required and optional fields will display
- Other than honorarium, expenses should be budget estimates (better to overestimate)
- More description is always better; be clear to avoid misunderstandings
- Bookings should not take place until contract is signed and final
- Link will be active until you "Submit"
- When submitted, entered information is final and cannot be edited

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Financial and Contract Approvals



SOURCES OF UNIVERSITY FUNDING				
COST OBJECT NAME	COST OBJECT NUMBER	COMMITTED BUDGET	RESPONSIBLE INDIVIDUAL	APPROVAL SIGNATURE
Business Services Fund	530000000	10188.00	Michael Christen	

ACCEPTED BY:

THE BOARD OF REGENTS OF THE UNIVERSITY OF NEBRASKA (THE UNIVERSITY)

Signature:

Printed Name: _____

Title: _____

Date: 08/31/2020

I affirm that I am authorized to sign on behalf of "The University" pursuant to the bylaws of the Board of Regents of the University of Nebraska, Executive Memorandum No. 14 and other respective campus policies. My person signing a University contract without proper authorization may be subject to disciplinary action, including dismissal.

- Responsible signee assigned based on responsible party and respective University policies
- Email will be sent with DocuSign link

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Executed Contract



- After all signatures, information and applicable tax documents are obtained, all parties will receive a copy of the executed contract
- When received, document will contain all signatures, a vendor number and an agreement number

AGREEMENT REFERENCE NUMBER: K20210000		VENDOR NUMBER: 299999	
MAXIMUM CONTRACT TOTAL	TERM START DATE	TERM END DATE	
\$10,188.00	3/22/21	3/29/21	

- Store an electronic copy of the contract for department records and further processing



Payment Process



PAYMENT TRANSMITTAL
(Must be completed and attached to each payment request submitted with relevant agreement number)

Service Provider Name: ABC Leadership Training, LLC
 Event: Leadership Summit
 Event Date/Time: March 22-25, 2021
 MAXIMUM CONTRACT TOTAL: \$10,188.00

Agreement # **K20210000**
 Vendor # **299999**

AGREEMENT REFERENCE NUMBER: **K20210000** VENDOR NUMBER: **299999**

MAXIMUM CONTRACT TOTAL: \$10,188.00 TERM START DATE: 3/22/21 TERM END DATE: 3/26/21

SERVICE PROVIDER INFORMATION
 ABC Leadership Training, LLC *(Not Contract for Training Purposes Only)*
 Contact: Jodi Smith
 Address: 1234 South University Ave
 City, State, Zip: Detroit, MI 48209
 Phone: (555) 555-5555
 Email: contact@abclead.com

SERVICE PROVIDER'S AGENT INFORMATION (if applicable)
 Name: _____
 Address: _____
 City, State, Zip: _____
 Phone: _____
 Email: _____

- Utilize the [Payment Transmittal](#) (found on SAPHIRE) to begin
- Keep an electronic, Excel file for each contract
- Fill out the necessary information directly from the contract



Payment Process – 1st Payment



- Will use fee/honorarium payment as first example
- Need to have funding split according to contract
- Enter payment details of current payment or reimbursement being made

Source of University Funding	Cost Category	Activity	Amount	Account
Professional Fee	Professional Fee	ABC Leadership Training, LLC	\$10,188.00	5000-0000
Travel	Travel	ABC Leadership Training, LLC	\$1,000.00	5000-0000
Transportation	Transportation	ABC Leadership Training, LLC	\$1,000.00	5000-0000
Meals	Meals	ABC Leadership Training, LLC	\$1,000.00	5000-0000
Printing	Printing	ABC Leadership Training, LLC	\$1,000.00	5000-0000
Supplies	Supplies	ABC Leadership Training, LLC	\$1,000.00	5000-0000
Telephone	Telephone	ABC Leadership Training, LLC	\$1,000.00	5000-0000
Travel Expenses	Travel Expenses	ABC Leadership Training, LLC	\$1,000.00	5000-0000
Other Expenses	Other Expenses	ABC Leadership Training, LLC	\$1,000.00	5000-0000
Total			\$10,188.00	

Section 2 - Payment		To Be Paid/Provided by the University to:		Other Individuals, Vendors, or Organizations		Maximum Contract Total	
Service	Amount	Service	Amount	Service	Amount	Service	Amount
Fee/Honorarium	\$10,188.00	Travel	\$1,000.00	Transportation	\$1,000.00	Meals	\$1,000.00
Travel	\$1,000.00	Printing	\$1,000.00	Supplies	\$1,000.00	Telephone	\$1,000.00
Transportation	\$1,000.00	Travel Expenses	\$1,000.00	Other Expenses	\$1,000.00		
Meals	\$1,000.00						
Printing	\$1,000.00						
Supplies	\$1,000.00						
Telephone	\$1,000.00						
Travel Expenses	\$1,000.00						
Other Expenses	\$1,000.00						
Total	\$10,188.00						



Other Contract Information



- If payment for vendor needs returned to campus for the event, contract must be executed and submitted for payment at least two weeks prior to the event
- If a vendor will not agree to utilize UNK's Standard Agreement, their contract needs to be presented to Business Services for review at least a month prior to the event
- If the contract involves a foreign vendor, the vendor will need to be created prior to executing the contract; contact Business Services at least two months in advance

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Resources



Contracts and DocuSign Process

Business Services
(308) 865-8448 or contracts@unk.edu

Payment Processing and Vendor Creation

Payment Services
(308) 865-8419 or acctspay@unk.edu

eShop Payment Processing

Procurement Services
(308) 865-8525

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