**Steps for Purchasing Services at Babson**

Note: All services require contract(s) and should be submitted through Workday for approval prior to services rendered.

**Contract Process (Before Workday submission)**

1. Faculty or Department staff should choose and complete a Babson Contract Template found [here on our site](https://www.babson.edu/business-and-financial-services/procurement/contract-templates/), based on the project and make note of the following:
   1. Do not use faculty name, but instead Department name for ‘on behalf of.’
   2. Fill in blank fields (including contact information)
2. If using a Babson Contract Template (that’s not altered), route contract for signature from both parties and attach a copy to Workday when submitting.
   1. If the Supplier alters (changes/edits) the Babson template, contract will need to be submitted through the [Babson College Procurement: Contract Submittal Form](https://babson.tfaforms.net/102) for Legal review. Please wait to receive an email back from Legal before signatures.
   2. If a Supplier contract is used instead of a Babson template, this will also require Legal review. Please submit the documents unsigned by both parties through the Contract Intake Form.
3. Once the supplier returns the contract signed, send it to department’s designated signer for signature.

**Workday Submission**

1. Doing business with Supplier for the first time? Make sure the supplier is set up in the Workday system. If not, submit a ***Create Supplier Request task in Workday.*** This will route to Accounts Payable for approval.
2. Once complete, submit the fully executed contract along with supporting documentation (example: Software approval, Independent Contract Form, Certificates of Insurance, etc.) using the ***Create Supplier Contract task in Workday.***
   1. If requesting the Certificate of Insurance (COI) requirement be waived, make a note in the Memo section of the contract submission and Procurement will review and advise next steps.
3. Once the supplier and contract are approved in Workday and Supplier Contract submission is complete. Procurement will generate a Purchase Order (for orders over 10K).
   1. Set up supplier invoice payment using the ***Create Supplier Invoice Request task in Workday.*** This will route to Accounts Payable for approval.

**Please refer to resources below for more information**

* Contract Process: [PowerPoint Presentation (babson.edu)](https://www.babson.edu/media/babson/assets/business-and-financial-services/Contract-Process.pdf)
* Contract Templates can be found here: [Contract Templates | Babson College](https://www.babson.edu/business-and-financial-services/procurement/contract-templates/)
* [Legal Submission Form](https://babson.tfaforms.net/102)
  + For contracts requiring review that are not Babson templates
* [Software & IT Project Request Form](https://babson.qualtrics.com/jfe/form/SV_a5AfKyuK7Sjfip8)
  + For large purchases -->Ex: major software purchase
  + Independent Contractor Form (IC Form)

Contact Procurement with any questions about this process at

[procurement@babson.edu](file:///C:\Users\garci\OneDrive%20-%20Babson%20College\Babson%20College\Procurement\Process\procurement@babson.edu)