

Submitting a New Contract Request with DocuSign CLM

1

Verify the availability of your contract within CLM, go to (insert link to the Available Contracts page).

2

Ensure you have all details ready:

1. Type of Agreement.
2. Primary purpose, benefit, or outcome of agreement.
3. Contact information of UTEP employee requesting the agreement.
4. College or Division/Department that the agreement pertains to.
5. Contract information of the Outside Party with whom this agreement is being sought.
6. Brief synopsis, start date, and end date of this agreement.
7. Documentation attachments.

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Proceed in opening the New Contract Request Form (insert link to powerform).

1. Preview the Form to ensure you have all requirements.
2. Enter Your Full Name.
3. Enter your UTEP email.
4. Click on Begin signing.

A new page will load:

5. Is not recommended to use the Finish Later option, click on Got it.
6. Read disclosure and click on the checkbox next to I agree to use electronic records and signatures.
7. Click on the Continue button that appears.

Let's get started.

IMPORTANT

Do not Initiate this form until you have gathered **ALL** the information required.

- 1 Click [HERE](#) to view the form and review the requirements.

Note: All documentation will be provided electronically.

Requestor

Your Name: *

2 Full Name

Your Email: *

3 Email Address

4 BEGIN SIGNING

Please review the document below.



CLM Admin
UTEP



Powered by DocuSign



Please read the [Electronic Record and Signature Disclosure](#).

☐ I agree to use electronic records and signatures.

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routing the agreement. The following information is required to complete this form:

1. Type of Agreement
2. Contact information for the UTEP employee who is requesting this agreement
3. Contact information for the Outside Party with whom this agreement is being sought
4. Brief synopsis, start date, and end date of this agreement
5. Document upload (not required, but strongly encouraged)

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CONTINUE

FINISH LATER

OTHER ACTIONS ▾

Use the Finish Later option to continue signing this document at a later time. [Learn more...](#)

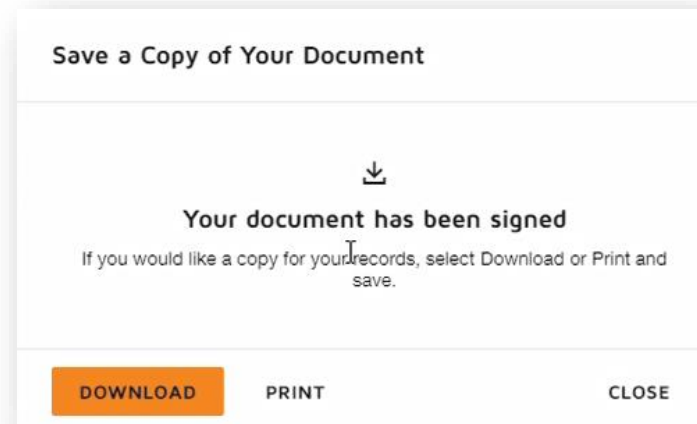
GOT IT

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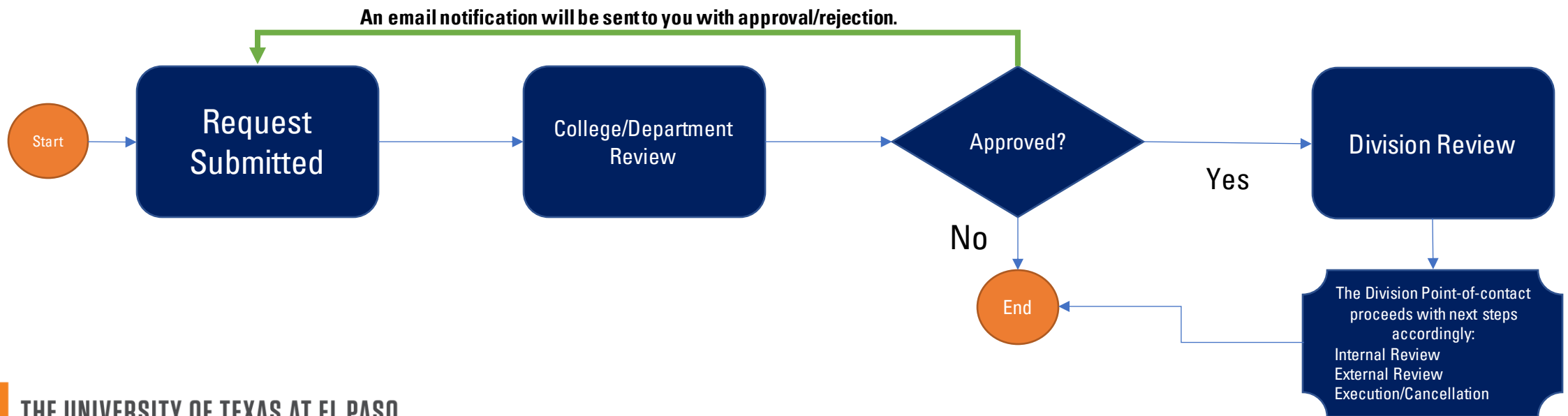
1. **Select appropriate primary purpose, benefit, or outcome of agreement.**
 - A box will open if “Other” is selected, please provide additional details.
2. **Select the type of agreement.**
 - If the agreement you are looking for is not available, proceed with process within the respective division.
3. **Select the type of template to use.**
 - If you are using a UTEP Standard Agreement, indicate here and you do not need to attach it to the request.
 - If you are using an outside party paper or an alternative template, indicate here and attach the same in the document upload area.
4. **UTEP Employee Responsible for requesting this agreement:**
 - Provide your information in fields 1-4
 - Select the College or Division where you are currently appointed.
5. **Summary of Outside Party information and agreement needs:**
 - Enter the Outside Party Name, DBA, and contact information in fields 6-18.
 - Provide a brief synopsis (30-500 characters) in field 19.
 - Indicate appropriate dates for:
 - Proposed start date.
 - Approximate end date.
 - If this agreement is a renewal, provide a copy of the previous agreement as an attachment in the documents section or include details on the provided field.
 - If this agreement is an amendment, provide a copy of the previous agreement as an attachment in the documents section or include details on the provided field.
 - For the exchange of funds, ensure you are including amounts, cost center, and approver details if applicable.
 - If you select “yes” both amounts will open (expense and revenue), if one does not apply simply put \$0.00 in that field.
 - Indicate if changes are needed to the UT standard contract insurance provisions.
 - Selecting “Yes” will open the list of insurance.
 - Select the appropriate type of insurance.
 - Also, a box will open to provide more details, you may include as many as possible.
6. **Document upload**
 - Proceed in uploading any applicable documents to aid in the approval of your request.
 - Click on the clipboard icon– This will open the attachments pop-up box.
 - You may use the “Upload a File” button to upload one document at a time and click on “Done” when you have submitted all.
 - If you indicated the use of an external template, follow the instructions to upload a copy of the MS Word onto the Repository and enter the same name in the field.
7. **Select a targeted effective date.**
 - If the date selected is less than 3 months from today, please provide details in question 28.
8. **You must certify both statements under question 29 and 30.**
 - Once you have agreed to both, you will be able to complete the form.
 - **NOTE:** If the “Finish” button does not appear, go back and ensure you have completed all required fields.



12. Make sure you save a copy for your records, click on “Download”.



What happens next?



Is my contract request approved?

The College/Department/Division Point of Contact will review your request for a new contract and proceed with determination. An email will be sent to you with the outcome.

Rejected:

- ☐ If the incorrect College/Department/Division is selected while submitting, the request will be rejected, and a new request must be submitted.
- ☐ If determined that the request is not approved for another reason, you will receive any additional information entered by the point of contact.

Approved:

- ☐ If approved, your request will proceed with the contract process which includes:
 - ☐ Internal review: internal business partners, approvers, and legal.
 - ☐ External review: outside party and internal UTEP team.
 - ☐ Final determination: executed contract with signatures, or cancellation.

