

Job Aid: Create a Contract Request in the Brown Contract Management System (BCM)

General Information About the Process

As a Contract Requester, you will create a Contract Request for review of a contract for the purchase of goods and services. Using BCM is the process that the University has identified to review contracts (terms and conditions) for the purchase of goods or services. It is also used to create University initiated contracts using OGC approved templates, such as the Professional Services Agreement.

The Contract Request consists of completing some preliminary questions and information, and attaching supporting documents, including a supplier contract if the supplier has provided one. Once submitted, the Contract Request will be routed for review to the Contract Managers in either Strategic Purchasing, Contracts & Insurance (SPCI) or the Office of Information Technology (OIT).

The Contract Request is the first step in the process. The Contract Manager will review the request then approve it, or return it to the requester for more information. The Contract Manager may also reject the request (in cases where review through BCM is not required). Once the Contract Request is approved, the Contract Manager will create the contract record, work with the appropriate parties for review and approval, facilitate negotiations, and, once finalized, send the contract for e-signature via DocuSign.

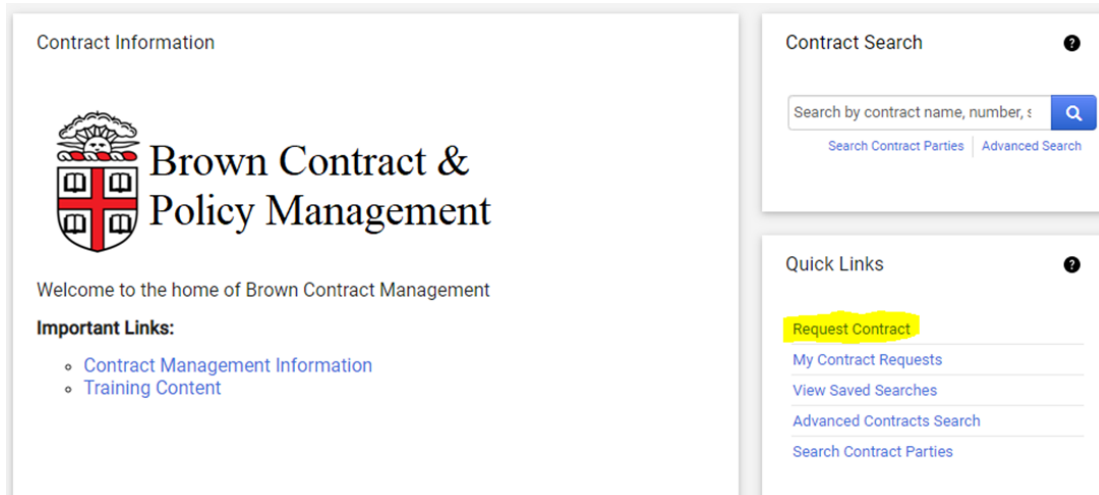
Note: Based on the selections you make in certain fields, other fields may or may not be visible. If you do not see a field on your request form that is in the below guide that is because the visibility on that field was not triggered, meaning you can continue completing your request.

Login to BCM

To login, access the Brown Contract Management System (BCM) via the following URL:
<https://brown.edu/go/bcm>. If you need access, please visit the [SPCI Process Improvement Website](#).


How To Request A Contract

To create a Contract Request, from the Contract Requester Dashboard, click *Request Contract* under Quick Links.



The screenshot shows the 'Contract Information' section of the Brown Contract & Policy Management dashboard. It features the university's crest and logo, a welcome message, and a list of 'Important Links' including 'Contract Management Information' and 'Training Content'. On the right, the 'Contract Search' section has a search bar and links for 'Search Contract Parties' and 'Advanced Search'. Below that, the 'Quick Links' section lists several options, with 'Request Contract' highlighted in yellow.

Contract Information


 **Brown Contract & Policy Management**

Welcome to the home of Brown Contract Management

Important Links:

- [Contract Management Information](#)
- [Training Content](#)

Contract Search

Search by contract name, number, s 

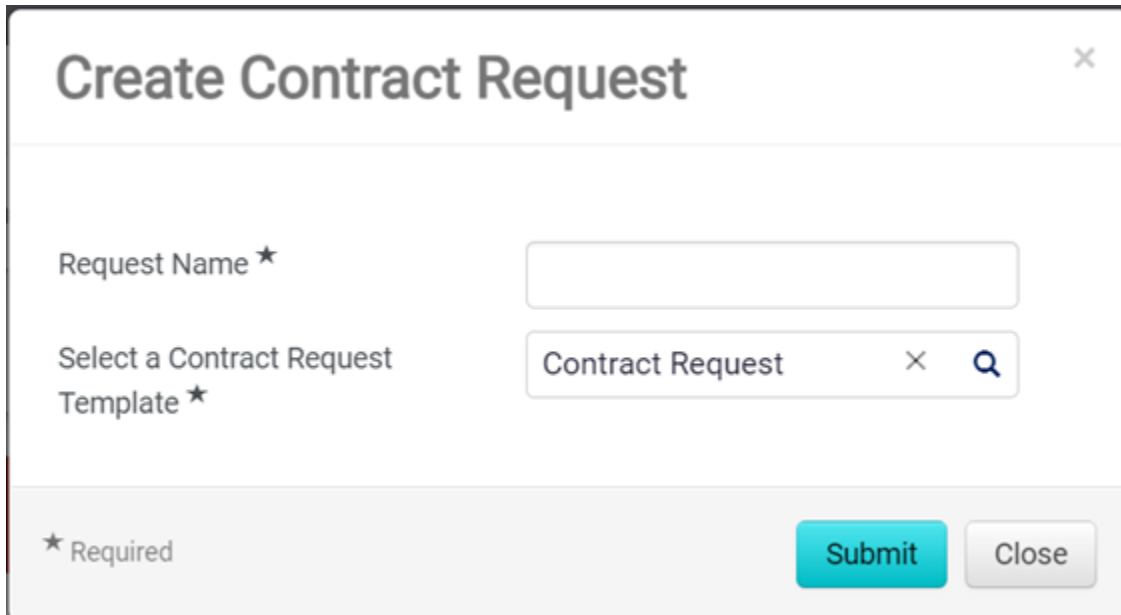
[Search Contract Parties](#) | [Advanced Search](#)

Quick Links


- Request Contract**
- [My Contract Requests](#)
- [View Saved Searches](#)
- [Advanced Contracts Search](#)
- [Search Contract Parties](#)

Create a Contract Request


Give the request a name in the “Request Name” field and click *Submit* to begin completing the Contract Request. Please note, there is only one template for a Contract Request which will default to “Contract Request”. Your contract name should be something descriptive, for instance the supplier’s name and your department’s name. For example: *Athletics PSA for John Smith FY22*.



The screenshot shows the 'Create Contract Request' form. It has a title bar with a close button. The form contains two required fields: 'Request Name' and 'Select a Contract Request Template'. The 'Request Name' field is empty. The 'Select a Contract Request Template' field has a dropdown menu showing 'Contract Request' with a search icon. At the bottom, there is a legend indicating that fields marked with a star are required, and two buttons: 'Submit' and 'Close'.

Create Contract Request 

Request Name ★

Select a Contract Request Template ★ 

★ Required

Submit **Close**

Instructions Page

The Instructions page contains some important information about the Contract Request Process.

Click on any of the tabs on the left side of the screen to go directly to a specific page of the Contract Request, or click *Next* to proceed to each page in order. Green check marks indicate that the required fields for that page have been completed. Click Next.

Athletics PSA for John Smith FY24	Instructions	Print Request History ?
Form Number: 720065 Request Status: Incomplete	All vendor supplied contracts and supporting documents should be uploaded on the attachments page in Word or PDF format. PLEASE NOTE: All software/services accepting payment must comply with University Policy on Accepting and Handling Payment Cards to Conduct University Business and be approved by the University Commerce Committee before they are submitted for a contract review. Contact Financial Services at commerce@brown.edu to initiate this process.	
Instructions		
Details		
Attachments 0		
Questions ✓		
Review and Complete		
Discussion		
Contract Request Workflow		
		Next >

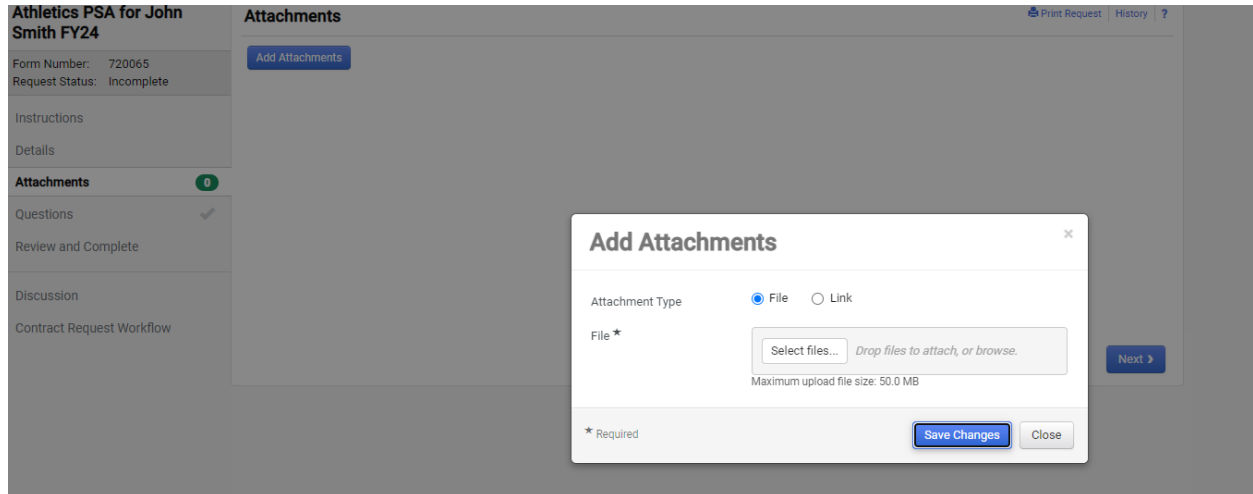
Details Page

The Details page displays the contract request name, the template used for the request, the contract type and the description. Update the name of the contract request if needed. Click Save Progress, or simply click Next, which will automatically save your progress.

Athletics PSA for John Smith FY24	Details	Print Request History ?
Form Number: 720065 Request Status: Incomplete	Contract Request Name * <input type="text" value="Athletics PSA for John Smith FY24"/>	
Instructions	Template Contract Intake Form	
Details	Contract Type -	
Attachments 0	Description -	
Questions ✓		
Review and Complete		
Discussion		
Contract Request Workflow		
		< Previous Save Progress Next >

Attachments

Attach the proposed contract to the request along with any other preliminary form, scope of work or information that should be submitted to the Contract Manager by clicking *Add Attachments*, then select files to upload and click *Save Changes*.



The screenshot shows a web interface for a contract request. On the left, a sidebar lists sections: Athletics PSA for John Smith FY24, Form Number: 720065, Request Status: Incomplete, Instructions, Details, Attachments (0), Questions (checked), Review and Complete, Discussion, and Contract Request Workflow. The main area is titled 'Attachments' and contains an 'Add Attachments' button. A modal window titled 'Add Attachments' is open, showing 'Attachment Type' with 'File' selected and 'Link' as an option. Below this is a 'File' section with a 'Select files...' button and a 'Drop files to attach, or browse.' instruction. A note indicates 'Maximum upload file size: 50.0 MB'. At the bottom of the modal are 'Save Changes' and 'Close' buttons. A 'Next' button is visible on the right side of the main area.

Questions: General Request Details

The General Request Details page contains the questions that must be answered in order to complete the contract request. Certain questions will only be visible based on how you answered previous questions. An asterisk indicates a required response. Be sure to complete all the required questions. The Summary section should be used for a quick synopsis of what the contract is for: *“SPCI is hiring a contractor to work with the Director of Strategic Sourcing on a project for cost savings. Timeframe will be July 1, 2022 through December 31, 2022.”* Click Save Progress, or simply click Next, which will automatically save your progress.

You will be asked to select the request type:

- New Contract
- Amendment to Statement of Work
- Amend an existing contract
- Renewal of an existing contract
- Termination of existing contract

You will then be asked if you are using a Brown Template or if the supplier has provided their own agreement. It is always preferred to use a Brown Template.

You will be asked to identify which Contract Type you are requesting:

- **Artist PSA** (for use when hiring an artist)
- **Facility Use Agreement** (for use when renting event space off campus-non hotel)
- **General Goods**
- **General Services**
- **Guest Speaker** (for use when an invited/guest speaker is coming to speak on campus, wants to use their agreement, and the Brown Guest Speaker Agreement Template is not being used)

- **Hardware Maintenance Agreement** (an agreement between Brown and another party to maintain and service its IT hardware)
- **Hotel Agreement** (for use when requesting a room block or renting space at a hotel)
- **License Agreement** (a vendor agreement to permit Brown to use a proprietary software product)
- **Professional Services Agreement** (for use when hiring a contractor or company to perform professional services such as consulting)
- **SaaS Agreement** (stands for Software as a Service and it is software which is not installed, instead it is a software accessed via the internet for Brown's use)
- **Software Maintenance Agreement** (a vendor agreement to maintain IT software used at Brown)
- **Statement of Work** (for use with formal, approved Master Services Agreements) *If selecting this Contract Type, please be sure to have the Master Agreement BCM contract number, as this is a required field.*

If you are unsure, please select General Goods or General Services, and the Contract Manager will help assign the correct type.

When selecting your Work Group, please select the one that most closely represents your department. Please note that not all small centers will appear. If you don't see your Work Group, select your reporting department. **Please do not choose Brown University or Brown Policy & SOP.**

Athletics PSA for John Smith FY24
Form Number: 720065
Request Status: Incomplete
Instructions
Details
Attachments 0
Questions ✓
Review and Complete
Discussion
Contract Request Workflow

Questions - Questions

On This Page
[Request Information \(9\)](#)
[Second Party Information \(6\)](#)
[Signer Information \(9\)](#)

Request Information
Please select the request type: *

New contract

Are you using a Brown Template, or has the supplier provided their own agreement? *

Brown Template

What type of Contract are you requesting?(If you don't see your contract type, please select General Goods or General Services) * ?

Professional Services Agreement (PSA)

Work Group - Do not select Brown University * ?

Athletics & Physical Education
In: Brown University

Department Name *

Athletics - Men's Soccer

Note: Please provide as much information as you can to help the Contract Manager understand your contract request. The Discussion tab can be used for more detailed information if necessary.

Service Details

If the contract you are requesting is a Professional Services Agreement (PSA), Artist PSA, or any other General Services Agreement, the system will ask you questions that are specific to this type of agreement. For example, if you are hiring an individual as an independent contractor, you will be required to upload the Employee vs. Independent Contractor Checklist. The answers that you provide on this page will be used to generate the contract document template. Be sure to include a detailed statement of work in the Services Provided section that describes the commitments expected from the contractor. Click Save Progress, or simply click Next, which will automatically save your progress.

Athletics PSA for John Smith FY24		Questions - Service Details	
Form Number: 720065 Request Status: Incomplete			
Instructions			
Details			
Attachments 0			
Questions ✓			
General Request Details ✓			
Service Details ✓			
Risk Questionnaire ✓			
Review and Complete			
Discussion			
Contract Request Workflow			

Service Details

Services Provided ⓘ

John Smith to come speak to the team for teambuilding exercises. Expectations are...

1916 characters remaining

Frequency of Payment ★ ⓘ

Hourly ▼

Hourly Rate ★

150

Total Amount Not To Exceed: Hourly Payments ★

3,000.00 ▲ ▼

Description of Hourly Payments ★

200 Hours over the course of the fiscal year

1956 characters remaining

Are there expenses being paid in addition to the fees as described above?

☐ Yes ☐ No

Are there expenses being paid in addition to the fees as described above?

☐ Yes ☒ No

Key Personnel ★ ?

Supplier Key Person

Special Conditions ★

Any special conditions listed here

1966 characters remaining

Work Schedule ★

Contractor will come in twice a week for 11 months.

1949 characters remaining

Risk Questionnaire

The Risk Questionnaire is designed to gather information about the requested contractual relationship to assist the University in determining when additional review or actions are necessary prior to finalizing the agreement. The Risk Questionnaire also determines routing to either SPCI or OIT. Read the options carefully and provide an answer to each question. Click Save Progress, or simply click Next, which will automatically save your progress.

Athletics PSA for John Smith FY24

Form Number: 720065
Request Status: Incomplete

[Instructions](#)

Details

Attachments 0

Questions ✓

General Request Details ✓

Service Details ✓

Risk Questionnaire ✓

Review and Complete

Discussion

Contract Request Workflow

Questions - Risk Questionnaire Print Request | History | ?

Risk Questionnaire

The Risk Questionnaire is designed to gather information about the requested contractual relationship to assist the University in determining when additional review or actions are necessary prior to finalizing the agreement.

Review the Risk Questionnaire Section and select all appropriate boxes under each Section. If no Risk issues are present, select N/A for that section.

Risk: PCI - Will the use of this vendor involve credit card payments being made to the University?

☐ Yes ☒ No

Risk: Is this a purchase of IT Software, Hardware, or IT Professional Services?

☐ Yes ☒ No

Data: Will the vendor host or have access to Brown sensitive or regulated data (PII, PHI, FERPA etc.)?

☐ Yes ☒ No

Risk: Export Compliance ★ ?

☒ N/A ☐ Export Control Classification Number (ECCN) included for goods being purchased ☐ International shipment of goods ☐ Services provided to companies or individuals not in the U.S.

Risk: Other Risk Considerations

☐ N/A ☐ Work performed outside the United States ☒ Contracted party performing work on campus ☐ Contracted party is a non-U.S. entity

★ Required

Previous Save Progress Next

Discussion Tab

Click on the *Discussion* tab on the left side of the screen to add a message to the Contract Manager regarding the contract. Contract Managers can respond on this page and you will receive a notification via email when a new message has been posted. This is a good way to keep all communication connected to the request. Please note that once the request has been approved, the Discussion thread is no longer available for new comments. You can proceed to the Contract Record and use the Comments section on that record.

The screenshot shows the 'Discussion' tab for 'Athletics PSA for John Smith FY24'. The left sidebar lists various sections: Instructions, Details, Attachments (0), Questions (checked), General Request Details (checked), Service Details (checked), Risk Questionnaire (checked), and Review and Complete. The main area is titled 'Discussion' and contains a 'Start New Thread' button and a message: 'There are no message threads for this request.' A modal window titled 'Post a New Message' is open, featuring input fields for 'Subject' and 'Message', an 'Add Attachments' button, and a '5000 characters remaining' indicator. The modal also includes a 'Post Message' button and a 'Close' button. A legend at the bottom indicates that an asterisk (*) denotes a required field.

Review and Complete

The *Section* column displays areas of the contract request that must be completed before it can be submitted. The *Progress* column displays a green check to the right of the step name if all required fields (questions with an asterisk beside them) have been completed for that step. If any of the required fields are not completed, the system will indicate that information is missing by showing *Incomplete*. If information is missing, return to the request and enter the missing data. Steps that are complete or not required display the green check.

The screenshot shows the 'Review and Complete' section for 'Athletics PSA for John Smith FY24'. The left sidebar lists: Instructions, Details, Attachments (0), Questions (checked), General Request Details (checked), Service Details (checked), Risk Questionnaire (checked), and Review and Complete. The main area is titled 'Review and Complete' and contains a warning message: 'All sections with required fields must be complete before you can complete your request'. Below this is a table with two columns: 'Section' and 'Progress'.

Section	Progress
Instructions	✓ No Required fields
Details	✓ No Required fields
Attachments	✓ No Required fields
Questions	✓ Incomplete
General Request Details	✓ Incomplete
Service Details	✓ Required fields complete
Risk Questionnaire	✓ Required fields complete

At the bottom, there is a legend indicating that an asterisk (*) denotes a required field, and two buttons: 'Previous' and 'Complete Request'.

Submit Request

Click *Complete Request* to submit the Contract Request. The Contract Request will be submitted and shown as “Under Review”. The Contract Managers in OIT or SPCI will be sent a notification of a pending request.

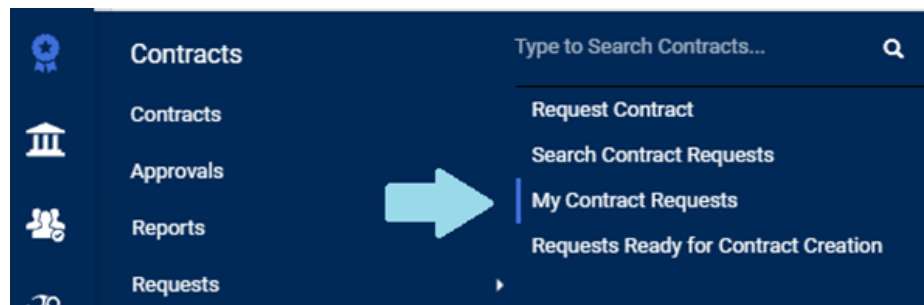
The screenshot shows the 'Review and Complete' page for a contract request titled 'Athletics PSA for John Smith FY24'. The page includes a sidebar with navigation links: Instructions, Details, Attachments (0), Questions (checked), General Request Details (checked), Service Details (checked), and Risk Questionnaire (checked). Below these is a 'Review and Complete' section with links for Discussion and Contract Request Workflow. The main content area shows a progress bar indicating 'Required fields complete'. Below this is a table with two columns: 'Section' and 'Progress'.

Section	Progress
Instructions	✓ No Required fields
Details	✓ No Required fields
Attachments	✓ No Required fields
Questions	✓ Required fields complete
General Request Details	✓ Required fields complete
Service Details	✓ Required fields complete
Risk Questionnaire	✓ Required fields complete

At the bottom right, there are buttons for 'Previous' and 'Complete Request'. A legend indicates that a star icon represents 'Required' fields.

Check the Status of your Request

After submitting a Contract Request, check the status of your Request from any screen, by clicking on the contract icon and browsing to Requests > My Contract Requests. You can also find a list of your contract requests on the Contract Requester Dashboard.



This will return the list of all Contract Requests you created. The most common **Request Form** Statuses are as follows:

- **Incomplete** – this is a draft request, meaning you are working on it
- **Under Review** – this is a request you have submitted but it has not been approved/processed
- **Approved** – this is a request that has been fully approved but has not been converted into a contract yet
- **Complete** – this is a request that has been approved and converted into a contract. The next step is that the Contract Manager will review and create the actual contract which will get sent out for signatures through the system.

Requests can also be **returned** or **rejected**. Please see below for definitions of those statuses.

My Contract Requests

[Filter Contract Requests](#)

[Create New Contract Request](#)

Contract Request Name	Template	Requested By	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	
SPCI - Tshirts for Staff Development Day presentation	Contract Intake Form	Courtney Wuethrich	Under Review	SPCI Review	-	6/15/2021 9:26 AM	6/15/2021 9:11 AM	Actions
PSA for ABC Company - SPCI	Contract Intake Form	Courtney Wuethrich	Under Review	CIS Review	-	6/1/2021 11:23 AM	6/1/2021 11:09 AM	Actions

You can see where a request is in the approval process or access the corresponding contract by clicking the Contract Request Name to open the request.

If the request has not been completed yet and you wish to see who is the next approver you can click on the *Contract Request Workflow* link in the left-hand menu to see where your request is in workflow.

Athletics PSA for John Smith FY24

Form Number: 720065
Request Status: Under Review

[Instructions](#)

[Details](#)

[Attachments](#)

0

[Questions](#)

✓

[General Request Details](#)

✓

[Service Details](#)

✓

[Risk Questionnaire](#)

✓

[Discussion](#)

[Contract Request Workflo...](#)

Contract Request Workflow

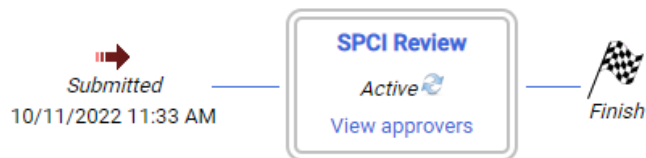
[Form Request Actions](#)

Show skipped steps



Orientation

Horizontal



My request is approved, now what happens?

Once a request has been converted to a contract, a link to the contract will appear on the request in the shaded box in the upper left corner. Click that link to access the contract. Please keep in mind that if the contract is in “Draft” status there is still work the Contract Manager needs to perform to execute the contract.



The screenshot shows a user interface for a contract request. At the top, there is a blue header bar with a 'Completed' button and the text 'This Contract Request has'. Below this, the title 'Athletics PSA for John Smith FY24' is displayed. A table-like section contains the following information: Form Number: 720065, Request Status: Completed, and Contract: ATHPE-PSA-00551. The contract number is highlighted in blue.

Form Number:	720065
Request Status:	Completed
Contract:	ATHPE-PSA-00551

Note: Once a contract is created from a request, the contract number will appear on the contract request.

Helpful BCM Terms and Definitions

Contract Request Form - This is the form that the requester completes and submits for the review or creation of a contract.

The Contract Request Form statuses are as follows:

- **Incomplete** - You have not yet submitted the request, and no one can see it but you.
- **Under Review** - Your request has been submitted, and is being reviewed by a Contract Manager in SPCI or OIT.
- **Returned** - The contract request has been returned to you for further action. The Contract Manager will have included a note in the notification you receive. There also may be a note in the Discussion thread.
- **Rejected** - The contract request has been rejected and it can no longer be edited or used to create a contract. There was likely no contract that needed to be reviewed or created. Check the Discussion thread for a note about your rejected request.
- **Approved** - The request has been approved, but a contract has not yet been created.
- **Completed** - The request has been approved and a contract record has been created. You can see the contract number in the gray box at the top left of your request.

Contract Record - This is the record in BCM that holds the contract information, and the hard copy of the contract document.

The **Contract Record** statuses are as follows:

- **Draft** - The contract is under review/negotiation and has not been submitted for approval.
- **Internal Review** – This is a draft contract that has been created and is being reviewed internally by a Brown University reviewer with access to BCM.
- **External Review** – This is a draft contract that has been created but has been sent for review to any pertinent parties outside of Brown. This may include the Second Party/Supplier, or a Brown reviewer outside of the system.
- **Pending Signature** – This is a contract that is complete and has not yet been submitted for electronic signature.
- **Out For Signature** – This is a contract that is complete and has been submitted for either electronic signature setup by the Contract Manager or is awaiting a fully signed contract to be uploaded by the Contract Manager.
- **Executed: Future** - The contract is approved and signed by all parties, but will not be in effect until its scheduled effective date.
- **Executed: In Effect** - The contract is approved, signed by all parties and active.
- **Expired** - A contract is automatically marked as expired once its scheduled end date has passed.
- **Complete** - The contract has reached its scheduled end date and all steps required to close the contract have been done.
- **Terminated** - The contract has been stopped before its scheduled end date. A termination is used post-execution, when circumstances determine that the contract will not go forward. You can copy and print a terminated contract, but it cannot be returned to active status.

Please visit the BCM Website for [FAQ and Tips](#).