



Routing and Correspondence “Green Folder” Approval Instructions

Requisition for Contract/Agreement for Services for Memphis-Shelby County Schools (MSCS)
(Effective October 7, 2024)

Services Exceeding \$3,500 to \$99,999 (Professional Services: Exceeding \$3,500 to \$74,999)

- A requisition must be submitted in APECS and received in Procurement.
- Once Procurement (Buyer) has reviewed and approved the sourcing method of the service, the Buyer will email a Procurement Advisory Form (PAF) to the requestor.
- The requestor will complete the online routing memo for contracts and upload the PAF and other documentation requesting pre-approval. **NOTE:** *It is required to upload the PAF before the routing memo can be submitted.*
- Once submitted, the Senior Leader will be first to approve the service requested. The order of **online** pre-approval is as indicated below:
 1. Senior Leader
 2. Business Finance Officer
 3. General Counsel
- After General Counsel has pre-approved online, the stakeholder must submit the contract request into Contract Advantage and upload the routing memo (pre-approved by all three parties above), the PAF, and all supporting documentation for the contract preparation. (**NOTE:** *For a new solicited IFB/RFP/RFQ contract, the Buyer will assist in submitting the contract request, but the stakeholder must submit the online routing memo for the three signatures above and send to the Buyer to upload with the PAF and other documentation.*)
- After receiving the contract request, General Counsel will assign the contract preparation to a Contract Manager. Once the contract has been vetted and reviewed by Legal, the contract will be routed through DocuSign for all vendor and internal signatures to the point of receiving the signature of the Superintendent. At this point, the contract is downloaded and placed in the Green Folder, which includes the partially executed contract along with all the supporting documentation. The Green Folder will be presented to the Office of the Superintendent for final signature.
- Once the contract has been fully executed, General Counsel will upload the contract back into Contract Advantage and email a copy to Procurement and the respective stakeholder. The Buyer will create the purchase order to be electronically emailed to the vendor.

Services for \$3,500 or Less: (Green Folder Pre-Approval Process **Not** Required)

- Services \$3,500 or less **do not** require an APECS requisition and purchase order, **EXCEPT AS OTHERWISE PROVIDED BELOW**.
- If a vendor requires a signature, the District level stakeholder must enter a contract request into Contract Advantage along with any supporting documentation to create the contract. General

Counsel will create the contract and route for signature.

- If the vendor requires a signature on the school-level, the financial secretary will request ***THE PRE-APPROVED*** contract template from Office of School Compliance. These pre-approved templates have been authorized by General Counsel. ***No other forms may be signed without the prior approval of General Counsel.***
- When a purchase order is required for services that are \$3,500 or less, the respective Senior Leader should sign required documentation. For example, services using federal funds will require a purchase order regardless of the dollar amount.
- **Please see the updated Delegation of Superintendent's Signatory Authority Memo for further details.**

NOTE: The Office of School Compliance maintains the updated contract templates for schools.