Contracts Workflow Process:

1. Request legal review using checklist. The checklist is available here: Contract Checklist.docx
2. Legal will review and work with department to get contract in final form.
3. Legal will return contract to department in a "Ready to Sign" format, along with a Contract Checklist that has been updated to reflect the "Ready to Sign" status.
4. Department will circulate contract for all required signatures. Options for signatures are:
    a. Use Adobe Sign
        i. Route signature to non-City party for signature first.
        ii. Route to Finance Director for pre-audit next.
        iii. Route signature to City signer last (this may mean routing it to yourself for signature last if you are the City signer – don't sign it before sending it out for signature)
        iv. Please cc: either Angela Beeker or Daniel Heyman so that fully signed copies will automatically be provided to Legal when the contract has been fully signed.
    b. Wet ink signatures
        i. Route signature to non-City party for signature first.
        ii. Route to Finance Director for pre-audit next.
        iii. Route signature to City signer last. (don't sign it before sending it out to others for signature)
        iv. Please scan and send a copy to Angela Beeker or Daniel Heyman so legal will have a fully signed copy.
5. Once a contract has been fully signed, please load into the appropriate City Contract Repository location based on the contract type (Project/Non-Project). The following should be uploaded into the Repository with the fully signed contract:
    a. If the contract was approved by City Council, a copy of the Resolution approving it.
    b. The "Ready for Signature" checklist returned by the Legal Department.
    c. A certificate of insurance from the other party if required by the contract.

    The Contract Repository can be found at this link and includes a manual outlining repository policies. As outlined in the manual, Project-related contracts and files will be stored in the applicable Project folders while Non-Projects will be stored in the Non-Project Department-specific Repository Contract Folders. After loading contract, fill out the form at this link to provide information to Finance. This form should also be utilized for updates to existing contracts or for requests to remove a contract from the active listing page.

Helpful information that is available:

Contract Management Training.pdf

Summary of entities.pdf

Contract Repository Training 101

Contract Repository Video Training

Contract Repository Manual