

 **Manage Workflow Notes**

Workflow Template Name: **COLLEGE STANDARD SERVICES WF**

Stage:

Note:

| Stage | Notes |
|------------------------------|---|
| DO & VPA Office Entry | The College VPA Office reviews the partially executed contract, insurance documentation, and back-up materials. The College VPA Office will then create container, upload contract, insurance documents, and back-up materials. Next step, please advance stage to District Off Business Review. |
| District Off Business Review | Roxanne will verify contract, Certificate of Insurance, Additional Insured (AI) Endorsement, back-up materials, and prepares for District sign-off on contract. Next step, please advance stage to EVC/CFO Sign-Off or Purchasing Office Sign-Off. |
| CFO Sign-Off (Rox only) | The contract has been sent to the EVC/CFO for final review of all documents. The EVC/CFO will sign-off on the contract. Once the contract has been signed by the EVC or CFO, upload executed agreement into the assigned iContracts container and move the stage to Distribute Executed Contract. |
| Purchasing to Sign(Rox Only) | The Director of Purchasing will review all documents, sign-off on the contract, and load the fully executed contract into the iContracts container. Next step, please advance stage to Distribute Executed Contract. |
| DO Contract Negotiation(Sue) | The DO Contract Negotiations stage is for those contracts that are still in negotiations. Next step, the stage that best fits what the user should do. |
| Vendor/Other Party Sign-Off | Vendor/Other Party Sign-Off - The VPA Office will send the contract to the vendor for their review and sign-off. Once the VPA Office receives the partially executed contract they should upload it into the container. Next step, please advance stage to College VPA Office Review. |
| Distribute Executed Contract | Distribute Executed Contract - Roxanne will distribute the Fully Executed Agreement to the VPA Office, via iContracts E-Mail or Collaboration Tab. The Purchasing Department will also receive a copy of this message for their reference. Next step, please advance stage to Final (Fully Executed) stage. |
| Final (Fully Executed) | The contract is in a fully executed state. The District Office will archive the contract once the contract has expired. |
| No Further Action (Rox Only) | |