

# PROCEDURES FOR SUBMITTING ALL AGREEMENTS FOR APPROVAL

This process is to include all Contracts, Service Agreements and Vendor initiated agreements.

Unit Managers/initiators will submit agreements:

**First** on Contract Tracking System (CTS) for legal approval for all agreements

**Second** on BoardDocs for agreements, where applicable

**Thirdly** on Adobe Sign for routing of approval/signatures for all agreements

Please refer to the following system outlines:

## **I. CTS TRACKING PROCESS/LEGAL REVIEW**

1. Initiator submits all agreements on CTS for legal review.  
Attached agreement and must include:
  - a. Agreement copy
  - b. Memorandum Approval Request for Contracts (MARC) (effective 08/07/2020)
  - c. Scope of Work
  - d. Approved Requisition/funds pre-encumbered and budget code
2. After Legal has approved and replied initiator submits agreement on BoardDocs, (if required) with CTS Number (or skip to step 3 if under \$50,000 cumulative for the vendor).
3. After Legal has approved and/or the Board of Trustees (BoardDocs) has approved the agreement, the Initiator routes the agreement on Adobe Sign for signatures with CTS Number.

## **II. BOARDDOCS (if applicable)**

1. Initiator submits an agreement to the Board of Trustees on BoardDocs that meet the requirement based on the dollar amount of \$50,000 or more cumulative.
2. The agenda item needs to include the following items/attachments:
  - a. The CTS Tracking Number and legal approval date
  - b. Agreement copy
  - c. Memorandum Approval Request for Contracts (MARC)
  - d. Scope of Work
  - e. Proof of available funds or fund pre-encumbered on a Requisition or PO

# PROCEDURES FOR SUBMITTING ALL AGREEMENTS FOR APPROVAL

## III. ADOBE SIGN AND ROUTING PROCESS

The **SAME AGREEMENT** must be routed on Adobe Sign after Legal (CTS) and/or Board of Trustees (BoardDocs) with the following included by the initiator:

1. **THE SAME AGREEMENT REVIEWED FROM LEGAL THAT WAS APPROVED ON CTS AND/OR SUBMITTED TO THE BOARD OF TRUSTEES ON BOARDDOCS MUST BE SUBMITTED ON ADOBE SIGN.**
2. Under memo type: CTS Number, legal approval date, name of vender and purpose.
3. The attached agreement must identify all approvers (reviewers) and signers needed on the documents.
4. Then include the following outline of individuals for each reviewer and signer per location as follows:

### ROUTING FROM THE COLLEGES ON ADOBE SIGN

College: Initiator uploads onto Adobe Sign with CTS Number/Approved by Legal/BoardDocs minutes

College: Unit Manager – Approver

**College Business Office – Signer**

College: Office of the President Executive Assistant - Approver

**College: President - Signer**

Purchasing: John Hiebert – Approver

Finance: Richard Ferreira – Approver

**Finance: Adil Ahmed (Acting Vice Chancellor) – Signer**

Chancellor's Office: Brandon Christian - Approver

**Chancellor's Office: Carla Walter (Acting Chancellor) – Signer (Final)**

### ROUTING FROM THE DISTRICT ON ADOBE SIGN

Initiator uploads onto Adobe Sign with CTS Number/Approved by Legal/BoardDocs minutes

Unit Manager (if not the Vice Chancellor) - Approver

**Vice Chancellor - Signer**

Purchasing: John Hiebert – Approver

Finance: Richard Ferreira – Approver

**Finance: Adil Ahmed (Acting Vice Chancellor) – Signer**

Chancellor's Office: Brandon Christian - Approver

**Chancellor's Office: Carla Walter (Acting Chancellor) – Signer (Final)**