

ADOBE SIGN AND A/C TRANSMITTAL FORM PROCESS

NORCO COLLEGE

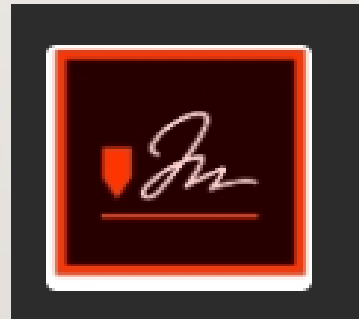
Presenters:

Esmeralda Abejar, Director, College Business Services

Lenny Riley, Instructional Technology Specialist

Ana Molina, Accounting Services Clerk

ADOBE SIGN



WHAT IS ADOBE SIGN?

- Adobe Sign is designed to route an agreement/contract electronically for legally binding digital signatures.
- Norco college will be utilizing Adobe Sign to collect signatures on Human Resources forms, Payroll forms, Budget forms and some Purchasing Forms and accounting forms.

Important things to remember:

- It is important to set up the order of signers/recipients accurately since the beginning.
- And add all **required** signers of the form when setting up approvers.
- Assign roles to signers
- Assign fields to signers.

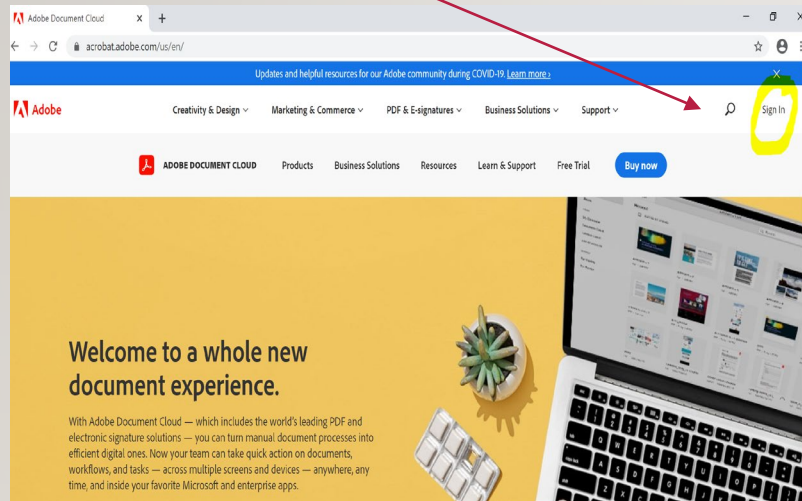
BENEFITS OF USING ADOBE SIGN

- After signers are set up, signature process routes automatically.
- Reminders for signers can be added to the form.
- Initiator can easily check the status of the approval and follow up with signer.
- When form is completed, an e-mail from FCCC - Riverside CCD <echosign@echosign.com> is received by all parties included in the approval flow.
- Initiator can find all the forms in Adobe sign and see the status.
- Signers can also see what forms they have signed and which ones are pending signatures.

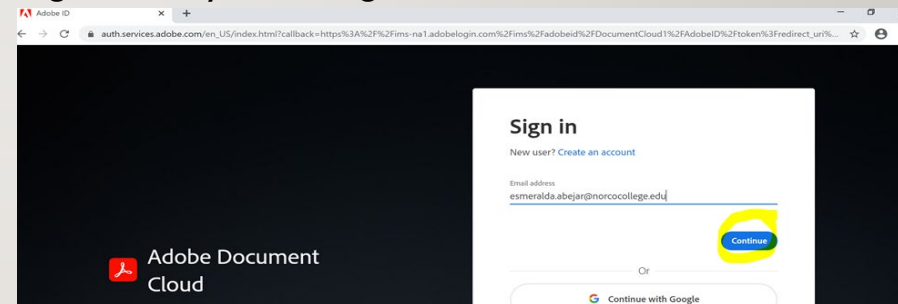
HOW TO USE ADOBE SIGN

- Go to www.adobe.com/documents

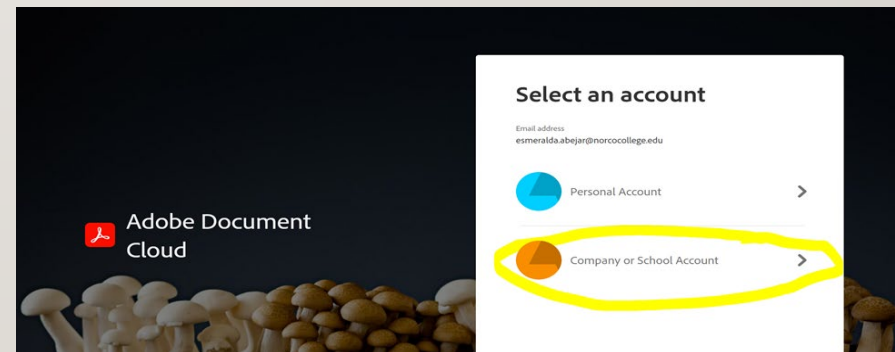
Click Sign In.



Sign in with your college e-mail address and hit continue

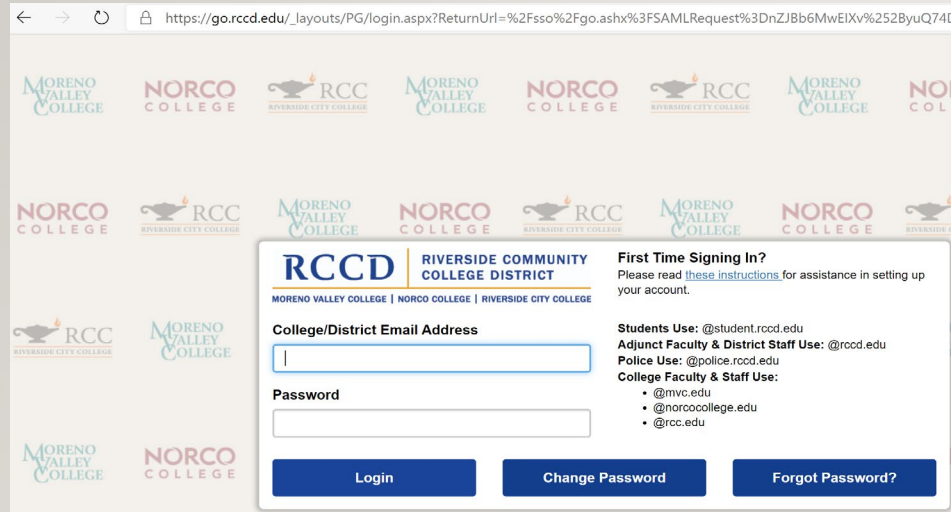


Click Company or School Account



HOW TO USE ADOBE SIGN

You will be directed to the RCCD network



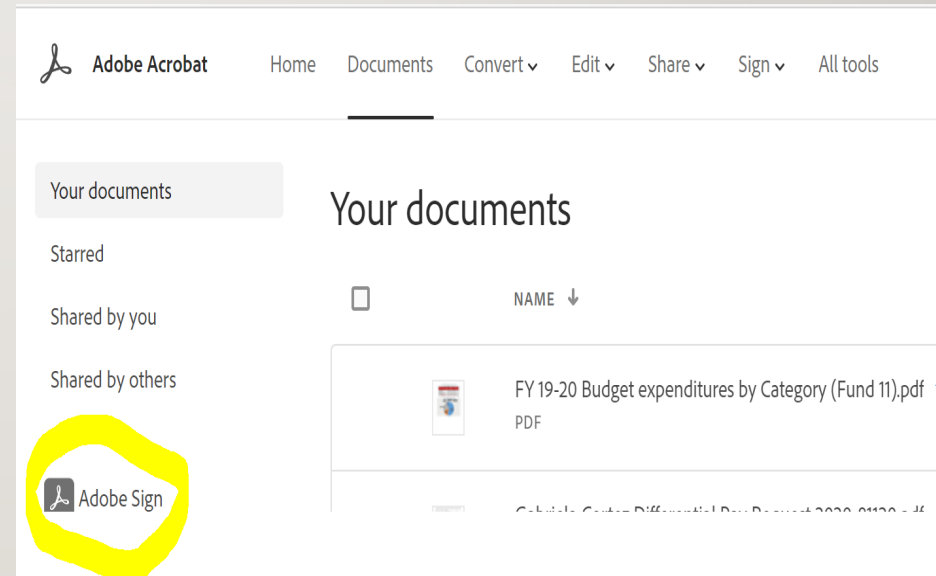
A screenshot of a web browser showing the login page for the Riverside Community College District (RCCD). The page features a repeating pattern of logos for Moreno Valley College, Norco College, and Riverside City College. In the center, there is a login form with the following fields and options:

- RCCD RIVERSIDE COMMUNITY COLLEGE DISTRICT**
- First Time Signing In?** Please read [these instructions](#) for assistance in setting up your account.
- College/District Email Address**: A text input field.
- Password**: A password input field.
- Login** button
- Change Password** button
- Forgot Password?** button

Additional information provided includes email addresses for different user types:

- Students Use:** @student.rccd.edu
- Adjunct Faculty & District Staff Use:** @rccd.edu
- Police Use:** @police.rccd.edu
- College Faculty & Staff Use:**
 - @mvc.edu
 - @norcocollege.edu
 - @rccd.edu

Click on Adobe Sign,



A screenshot of the Adobe Acrobat web interface. The top navigation bar includes the Adobe Acrobat logo and menu items: Home, Documents, Convert, Edit, Share, Sign, and All tools. The main content area is titled "Your documents" and lists categories: Starred, Shared by you, and Shared by others. A yellow circle highlights the Adobe Sign icon in the bottom left corner of the interface. On the right side, a document titled "FY 19-20 Budget expenditures by Category (Fund 11).pdf" is visible.

HOW TO USE ADOBE SIGN CONTINUES

1. Click Send

2. Add files

3. Enter Recipients e-mails in order

4. Assign Signers Roll

5. Update default message as needed.

6. Check box and click next

Optional: password protect and set reminder

A recipient that is copied can't sign/initial documents

The screenshot shows the Adobe Sign 'Compose' page. At the top, the 'Send' button is highlighted in yellow. The 'Recipients' section is highlighted with a yellow bracket and contains a list of recipients: '1 Myself', '2 ana.molina@norccollege.edu', '3 denise.terrazas@norccollege.edu', and '4 Enter recipient email'. The 'Message' field contains the text 'Request to change salary budget codes' and 'Please review and complete Request to change salary budget codes. (TESTING only)'. The 'Files' section shows a file named 'Request to change salary budget codes.pdf'. The 'Options' panel on the right has 'Password Protect' and 'Set Reminder' checked. The 'Next' button is highlighted in yellow at the bottom.

* Include all required signers on the form when setting Adobe sign.

SIGNERS ROLES

The screenshot displays a user interface for assigning roles to recipients. At the top, there's a 'Recipients' section with a toggle for 'Complete in Order' (currently off) and 'Complete in Any Order'. To the right are links for 'Add Me' and 'Add Recipient Group'. Below this is a list of recipients, with the first one having a dropdown menu open. The dropdown menu lists five roles: Signer (with a pen icon), Approver (with a checkmark icon), Acceptor (with a document icon), Form Filler (with a document icon and a pencil), and Delegator (with a right-pointing arrow icon). To the right of the recipient list is an 'Options' panel with checkboxes for 'Password Protect' and 'Set Reminder', and a 'Signature Type' section with radio buttons for 'Electronic' and 'Written'. A yellow sticky note is attached to the top right of the interface.

Roles:

In addition to designating recipients as Signers, you can mark them as Approvers or Form Fillers, Acceptors or Delegators

Approver: Recipient marked as approvers review and approve the document but they are not required to sign it. They may be required to enter data into fields.

Form Filler: Recipients marked as form fillers are required to enter data into the form fields and submit the document

Acceptor: Recipients marked as acceptors are required to accept the document. They may be required to enter data in to fields.

Delegator: Recipient marked as delegators may review the document but can't sign. Approve or accept the document or acknowledge its receipt. They need to forward the document to another user who may take the appropriate action.

AUTHENTICATION

The screenshot shows the Adobe Sign interface. At the top, there is a navigation bar with 'Home', 'Send', 'Manage', and 'Reports'. Below this is the 'Recipients' section, which includes a toggle for 'Complete in Order' (set to 'Complete in Any Order') and links for 'Add Me' and 'Add Recipient Group'. The recipient list contains two entries: '1 michael.collins@norccollege.edu' and '2 Enter recipient email'. A dropdown menu is open for the second recipient, showing 'Authentication' options: 'Email' (checked), 'Password...', and 'Adobe Sign'. Below the dropdown is an 'Options' section with checkboxes for 'Password Protect' and 'Set Reminder'. A red arrow points from the 'Authentication' dropdown to the 'Email' option, and another red arrow points from the 'Authentication' dropdown to the 'Options' section.

To increase security in the approval process, it is recommended that Adobe Sign is selected for authentication purposes when using the form internally within RCCD .

When forms are being sent to vendors outside the District, you can use the e-mail or set up a password for authentication purposes since they might not have an Adobe Sign account set up.

ASSIGN FIELDS

IVERSIDE COMMUNITY COLLEGE DISTRICT - DIFFERENTIAL PAY REQUEST FORM

Employee to receive differential pay: TESTING

Title of position employee is assigned to: Outreach Specialist Upward Bound TTS #: 2-488-xxx

Title and name of absent employee for whom the employee will be filling in for: currently receiving Student Resource

Specialist differential, switch to Upward Bound Coordinator and cover difference - Grade "O" TTS #: 2-488-XXX

Employee filling in to perform 100% of the duties or a partial percentage of duties? currently partial, once approved 10...

What percentage of the duties of the job is the employee performing? 35%

Have you discussed this with the employee? Yes No Date of discussion: March 2020 Emp. Initials:

Is the employee performing these duties for a period of time exceeding 5 working days within a fifteen-calendar day period?

Esmeralda Abejar (me) (Prefill)

- Esmeralda Abejar (me) (Prefill)
- Ana Molina (ana.molina@norccollege.edu) (Signer)
- Esmeralda Abejar (me) (Signer)
- Anyone

The color will help you identify what fields can be changed and who can change them.

ADD SIGNATURE FIELDS

This section should only be completed for employees not filling in for someone who is currently out on leave. This section is for tasks in which an employee is being asked to perform a substantial amount of duties unique to a higher classification or significantly different duties at the request of the manager. Please describe the specific duties unique to a higher classification as well as the percentage of time spent performing each task. (Please make sure that the duties noted are not already currently covered on the employee's current job description):

Did the manager requesting differential pay review the employee's current job description? Yes No

Additional Duties Outside of Employee's

Current Job Description that are being Performed

Current Job Description that are being Performed	Percentage of Time Spent
identifies and recruits eligible participants	5%
communicates with parents about the academic progress of each participant	10%
assists participants with applications for financial aid, scholarships, and admissions to post-secon...	10%
supervises participants during program activities	10%

* Signature

Title and signature of management staff requesting Differential Pay

Date

RECIPIENTS

 Esmeralda Abejar (me) 
(Prefill)

Signature Fields

Signature

Initials

Signature Block

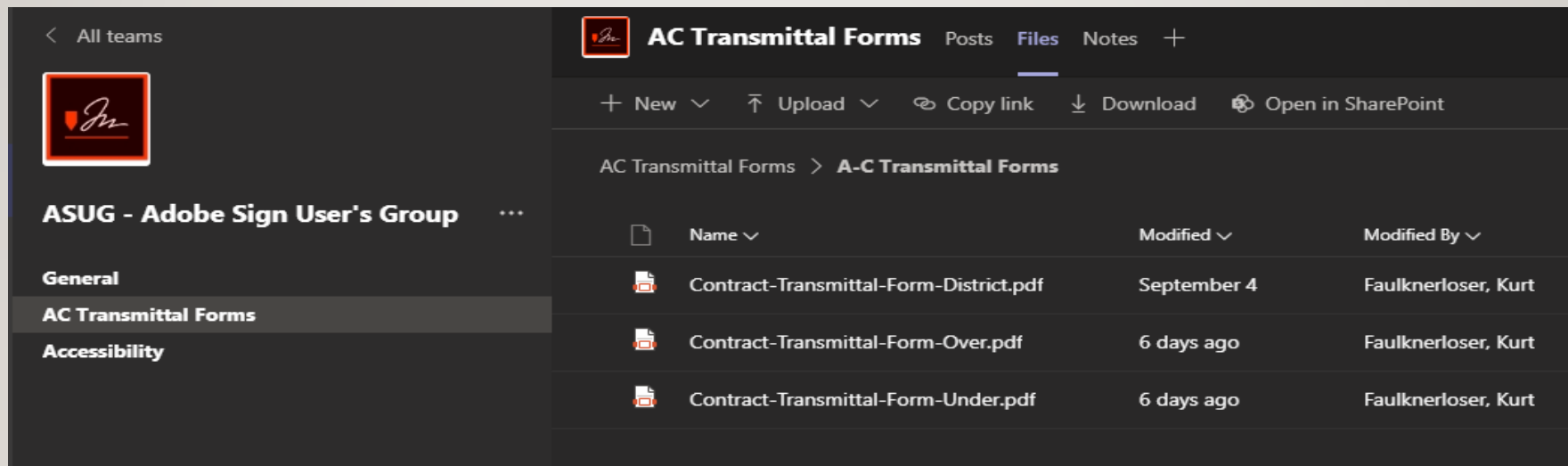
Stamp

Click
and
drag.

Your progress can be saved. Send when all the fields are filled out.

WHO DO I SEND THE FORM TO?

- All forms and the order of signers are posted to a teams site.



The screenshot shows a Microsoft Teams interface for a site named "AC Transmittal Forms". The site is part of the "ASUG - Adobe Sign User's Group". The "Files" tab is active, displaying a list of three PDF documents:

Name	Modified	Modified By
Contract-Transmittal-Form-District.pdf	September 4	Faulknerloser, Kurt
Contract-Transmittal-Form-Over.pdf	6 days ago	Faulknerloser, Kurt
Contract-Transmittal-Form-Under.pdf	6 days ago	Faulknerloser, Kurt

FACULTY FORMS APPROVAL FLOW

	FORM TITLE	SPECIAL PROJECT REQUEST
	Position	ACTION
0	IDS/Admin Assist	Initial
1	Faculty Member	Signature
2	Department Chair	Signature
3	Dean/Director/Manager (Project Supervisor)	Signature
4	Instructional Support Coordinator	Initial
5	Area VP	Signature
6	Director Business Services	initial
7	VP of Business Services	Signature
8	President	Signature
9	District Budget office	initial
10	HR Liaison	Sylvester Julienne
11	Payroll Tech by Employee last name	Initial

	FORM TITLE	LOAD BANK ELECTION FORM
	Position	ACTION
1	Faculty Member	signature
2	Dean/Director/Manager (Project Supervisor)	Initial
3	Area VP	signature
4	Payroll Tech by Employee last name	Initial
5	Admin Assistant IV/Admin Assistant III	Copy

	FORM TITLE	SPECIAL PROJECT TIME REPORT
	Position	ACTION
0	IDS/Admin Assist	Initial
1	Faculty Member	Signature
2	Dean/Director/Manager (Project Supervisor)	Signature
3	Payroll Tech by Employee last name	Initial
4	Admin Assistant IV/Admin Assistant III	Copy

	FORM TITLE	LOAD BANK ELECTION FORM
	Position	ACTION
1	Faculty Member	signature
2	Dean/Director/Manager (Project Supervisor)	Initial
3	Area VP	signature
4	Payroll Tech by Employee last name	Initial
5	Admin Assistant IV/Admin Assistant III	Copy

	FORM TITLE	INTENT TO HIRE- ASSOC. FAC (PT Faculty and Substitutes)
	Position	ACTION
0	IDS	initiator
1	Department Chair	Signature
2	Dean/Director/Manager (Project Supervisor)	Signature
3	HR Liaison	Yami Chavez?
4	Payroll Tech by Employee last name	Initial

CLASSIFIED FORMS APPROVAL FLOW

	Form Title	CHANGE IN SALARY BUDGET CODE
	Position	Action
1	Dean/Director/Manager	Signature
2	Financial Technical Analyst	initial
3	Area VP	Signature
4	Director Business Services	initial
5	President	Signature
6	District Budget office	initial
7	Payroll Tech by Employee last name	initial
8	HR/Shannon Minter	initial

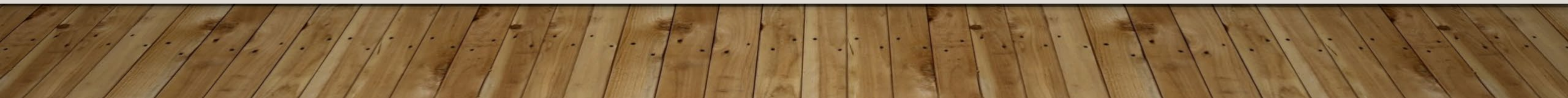
	Form Title	Intent to Hire - Staff
	Position	Action
1	Classified employee	signature
2	Dean/Director/Manager	signature
3	Financial Technical Analyst	initial
4	Area VP	signature
5	VP of Business Services	initial
6	President	signature
7	District Budget office	initial
8	HR/ Yami Chavez	initial
9	Payroll Tech by Employee last name	initial

	Form Title	Special Project Request - Classified, Temporary Hourly & Non-Academic Employees
	Position	Action
1	Employee	signature
2	Dean/Director/Manager (project supervisor)	signature
3	Financial Technical Analyst/Accounting Services Clerk	initial
4	Area VP	signature
5	VP of Business Services	signature
6	President	signature
7	District Budget office	signature
8	HR/Sylvester Juliene	initial
9	Payroll Tech by Employee last name	initial

	Form Title	DIFF. PAY REQUEST
	Position	Action
1	Classified employee	initial
2	Dean/Director/Manager	Signature
3	Financial Technical Analyst	initial
4	Area VP	Signature
5	Director Business Services	initial
6	VP of Business Services	Signature
7	President	Signature
8	District Budget office	initial
9	HR/ Shannon Minter	initial
10	Payroll Tech by Employee last name	initial

	Form Title	Intent to Hire - Staff- Extension
	Position	Action
1	Classified employee	signature
2	Dean/Director/Manager	signature
3	Financial Technical Analyst	initials
4	Area VP	signature
5	VP of Business Services	signature
6	President	signature
7	District Budget office	initials
8	HR/ Shannon Minter	initials
9	Payroll Tech by Employee last name	initials

	Form Title	REQUEST FOR INCREASE/DECREASE IN EMPLOYEE WORKLOAD
	Position	Action
1	Classified employee	signature
2	Dean/Director/Manager	signature
3	Financial Technical Analyst or Accounting Serv Clerk	initials
4	Area VP	signature
5	VP of Business Services	signature
6	President	signature
7	District Budget office/Cristina Ambriz	initials
8	HR/ Shannon Minter	initials
9	Payroll Tech by Employee last name	initials



BUDGET APPROVALS

Form Title	Budget Transfer
0 Admin Assistants/Grants Specialist	initiates
1 Dean/Director/Manager (Budget Director)	Signature
2 Admin Assistant IV	initials
3 Area VP	Signature
4 Accounting Svcs Clerk (fund 12)	initials
5 Director Business Services (fund 11)	Initials
6 VP of Business Services	Type A/Type B
7 District Budget office/ VC of BS	Initials

Form Title	Invoices	
1 Admin Assistant	initial	When submitting invoices for payment, please take the time to verify and confirm the PO number listed on the invoice. This will ensure payment takes place in a timely manner. Please ask the vendor the vendor to update their records with the new PO Number.
2 VP/Dean/Director/Manager (Budget Director)	signature	
3 Accounts Payable	signature	
4 Accounting Svcs Clerk (fund 12)	Copy	

Form Title	Itemized Expense Reimbursement (Non-Travel Related Expenses)	
1 Admin Assistant/Claimant	initiate	Please note: before submitting IER make sure enough funding is available and expense is allowable. Also, please attached receipts.
2 Employee claimant Signature	signature	
3 Dean/Director/Manager (Budget Director)	signature	
4 Area VP	signature	
5 Accounting Svcs Clerk (fund 12)	initials	
6 Financial Technical Analyst (Fund 11)	initials	
7 Director Business Services	signature	
8 District Budget Analyst	signature	
9 Accounts Payable	initials	
10 Admin Assistant IV	Copy	

DISTRICT CONTACTS:

Payroll Tech by Employee Last Name Starting with:	
Aa-Co and St-T	Celeste.Baldonado@rccd.edu
Cp-Ha and U-Wg	Melissa.Loera@rccd.edu
Hb-Me and Wh-Z	Hilda.Haley@rccd.edu
Mf-Ss	Sue.Pagano@rccd.edu

For Purchasing Specialist, send to the following staff:

Vendor Range	Purchasing Specialist
A - D	Melissa.Griffith@rccd.edu
E - O	Melinda.Chavez@rccd.edu
P - Z & Office Depot	Aprilyn.Tulod@rccd.edu

For Budget Analyst, send to the following staff:

Location	Budget Analyst
District Office and Moreno Valley College	Michele.Arnold@rccd.edu
Norco College	Cristina.Ambriz@rccd.edu
Riverside City College	Cynthia.Gundersen@rccd.edu

AP Specialist	Vendor Range	Campus Travel
Mireya Vargas	A-C	Moreno Valley
Astrid Denunno	D-N	District Office
Sandra Gutierrez	O-Q	Norco
Rongyu Lu	R-Z, Utilities	Riverside

RECIPIENTS: APPROVER, SIGNER, DELEGATOR, ACCEPTOR

- Sign in to [Adobe.com/documents](https://adobe.com/documents) and click on Adobe Sign then click on Manage.
- Review the document.
- Check where the document is going next, all signers appear on the right hand side.
- Sign the document.
- You will receive an e-mail with the **signed report** and the **audit form** when the document has been fully signed.
- DO NOT forward the e-mail, if you can't sign the document, you can delegate to someone else.

Delegate Signature



Options ▾

Change Salary Budget Codes_Bernice

Read agreement

Delegate signing to another

Decline to sign

Clear document data

View history

Download PDF

Start



RIVERSIDE COMMUNITY COLLEGE REQUEST TO CHANGE SALARY BUDGET CODES

This request to Change Salary Budget Codes must be received by the Budget Office

Classified

Confidential

Position Information:

Position Title: Grants Administrative Specialist

Name: Bernice Delgado

Dep

Effective Date of Change: 10/1/2020

Signers who do not want to sign, DO NOT forward the e-mail from Adobe Sign instead delegate someone to sign on your behalf



A/C TRANSMITTAL PROCESS



A/C TRANSMITTAL FORM PROCESS

What is the Purpose of the A/C Transmittal Form

- The purpose of the A/C Transmittal form **is not to collect** signatures.
- Its purpose is to internally route an agreement or contract along with its supporting documentation to all parties involved with the approval of the agreement/contract.
- This facilitates signing of the agreement/contract as well as other business processes involved with obtaining the goods and services described in the contract.

A/C TRANSMITTAL FORM PROCESS

- Do Not use Adobe sign to route A/C transmittal form for approval.
- Do Not combine the contract with any transmittal documents, (requisition, contracts review approval, insurance, etc.,.)
- While it is encouraged to use Adobe Sign to secure digital signatures on the **actual agreement/contract**, it is important to understand that signing the agreement/contract is only part of the overall process that the A/C Transmittal Form supports.

A/C TRANSMITTAL FORM PROCESS

What is the A/C Transmittal Form?

- Is a fillable PDF form used to summarize the information contained in an agreement/contract
- Consolidates additional required documentation
- And provides instruction on where the agreement/contract should be routed for signature

There are three different A/C Transmittal Forms:

- One for Colleges that can fully execute an agreement/contract (\$95,200 and under)
 - One for Colleges that require Board approval and Signature from the Vice Chancellor of Business and Financial Services to fully execute the agreement/contract (over \$95,200)
 - And one for all District agreement/contracts.
-
- Please use the correct form according to the amount of the contract.
 - Each form outlines the approval process



Where are the forms located?

TEAMS Group- ASUG-Adobe Sign user group

AGREEMENT/CONTRACT (A/C) TRANSMITTAL FORM – \$95,200 AND UNDER

20200921

INITIATING DEPARTMENT COMPLETE THIS SECTION:

Vendor/Other Party Name	Business Location (City and State)	Time Period A/C is in Effect	Description of Goods and Services (If amendment, also include amendment number, first, second, third, etc.)	Amount	Budget Code 11-ABC-1000-0-0000-0000-0000

1. Galaxy Requisition Number: _____ (leave blank if revenue generating)
2. Vendor Contact: Name: _____ Title: _____ Email Address: _____
3. RETURN TO: Name: _____ Title: _____ Email Address: _____
4. Initiating Department Manager Name: _____ Title: _____ Completed
5. Initiating Department Manager ensure that all A/C information is accurate, and all required documents have been attached:
6. **After completing this section, email to College Business Services Office.** *Include all required attachments BEFORE emailing. See instructions on page 2.
*To add any additional notes or comments please use the comment tool. See instructions on page 2.

COLLEGE BUSINESS SERVICES OFFICE REVIEW AGREEMENT/CONTRACT:

1. Business Office certifies budget for A/C. Name: _____ Title: _____ Completed
2. College Business Services Office provide a RETURN TO Email Address: _____
3. **After completing this section, email this form to Area Vice President.**

COLLEGE AREA VICE PRESIDENT REVIEW A/C INFORMATION & ATTACHMENTS:

1. Area Vice President Name: _____ Title: _____ Completed
2. Area VP confirms that all A/C information is accurate, and all required documents have been attached:
3. **After completing this section, email this form to College Vice President of Business Services.**

COLLEGE VICE PRESIDENT OF BUSINESS SERVICES REVIEW A/C INFORMATION & ATTACHMENTS:

1. Vice President Name: _____ Title: _____ Completed
2. Vice President confirms that all A/C information is accurate, and all required documents have been attached:
3. **After completing this section, email this form to College President**

COLLEGE PRESIDENT REVIEW & SIGN FINAL CONTRACT:

1. President Name: _____ College: _____ Completed
2. President confirms that all A/C information is accurate, and all required documents have been attached:
3. **After completing this section, email this form to District Budget Analyst.** *See instructions for correct Budget Analyst.

DISTRICT BUSINESS AND FINANCIAL SERVICES REVIEW AGREEMENT/CONTRACT:

1. Budget Analyst confirms budget for Agreement/Contract. Name: _____ Completed
2. **After completing this section, email this form to Purchasing Specialist.**

DISTRICT BUSINESS AND FINANCIAL SERVICES COMPLETE PURCHASE ORDER:

1. Purchasing Specialist confirms Purchase Order has been generated. Name: _____ Completed
2. Attach copy of completed Purchase Order to this form. *See instructions on page 2 for attaching documents
3. **After completing this section, email this form to RETURN TO address for Initiating Department and College Business Services Office.**

A/C comes to Business Service before Area VP

A/C TRANSMITTAL FORM CONT.,



Attachments x

SPR-Template.pdf

AGREEMENT/CONTRACT (A/C) TRANSMITTAL FORM – \$95,200 AND UNDER

20200901

INITIATING DEPARTMENT COMPLETE THIS SECTION:

Vendor/Other Party Name	Business Location (City and State)	Time Period A/C is in Effect	Description of Goods and Services (If amendment, also include amendment number, first, second, third, etc.)	Amount	Budget Code 11-ABC-1000-0-0000-0000-0000
Test	Test	Test	Test	80,000	

- Galaxy Requisition Number: AXXX (leave blank if revenue generating)
- Vendor Contact: Name: Test Title: Test Email Address: Test@test.edu
- RETURN TO:** Name: Test Title: Test Email Address: Test@test.edu
- Initiating Department Manager Name: Lenny Riley Title: Dean
- Initiating Department Manager ensure that all A/C information is accurate, and all required documents have been attached: Completed 09/10/2020
- After completing this section, email to College Business Services Office.** *Include all required attachments BEFORE emailing. See instructions on page 2.
*To add any additional notes or comments please use the comment tool. See instructions on page 2.

COLLEGE BUSINESS SERVICES OFFICE SERVICES REVIEW AGREEMENT/CONTRACT:

- Business Office certifies budget for A/C. Name: Esmeralda Abejar Title: Director, Business Services Completed 09/10/2020
- After completing this section, email this form to Area Vice President.**

COLLEGE AREA VICE PRESIDENT REVIEW A/C INFORMATION & ATTACHMENTS:

- Area Vice President Name: Tanya Wilson Title: VP
- Area VP confirms that all A/C information is accurate, and all required documents have been attached: Completed 09/10/2020
- After completing this section, email this form to College Vice President of Business Services.**

COLLEGE VICE PRESIDENT OF BUSINESS SERVICES REVIEW A/C INFORMATION & ATTACHMENTS:

- Vice President Name: Ana Molina Title: VP
- Vice President confirms that all A/C information is accurate, and all required documents have been attached: Completed 09/10/2020
- After completing this section, email this form to College President**

COLLEGE PRESIDENT REVIEW & SIGN FINAL CONTRACT:

- President Name: Denise Terrazas College: President
- President confirms that all A/C information is accurate, and all required documents have been attached: Completed
- After completing this section, email this form to Purchasing Specialist.** *See instructions for correct Purchasing Specialist.

DISTRICT BUSINESS AND FINANCIAL SERVICES COMPLETE PURCHASE ORDER:

- Purchasing Specialist confirms Purchase Order has been generated. Name: Completed
- Attach copy of completed Purchase Order to this form. *See instructions on page 2 for attaching documents
- After completing this section, email this form to RETURN TO address and College Business Office.**

A/C TRANSMITTAL FORM INSTRUCTIONS

For Budget Analyst, send to the following staff:

Location	Budget Analyst
District Office and Moreno Valley College	Michele.Arnold@rccd.edu
Norco College	Cristina.Ambriz@rccd.edu
Riverside City College	Cynthia.Gundersen@rccd.edu

*Selecting the wrong Budget Analyst and/or Purchasing Specialist will result in a delay in processing.

For Purchasing Specialist, send to the following staff:

Vendor Range	Purchasing Specialist
A - D	Melissa.Griffith@rccd.edu
E - O	Melinda.Chavez@rccd.edu
P - Z & Office Depot	Aprilyn.Tulod@rccd.edu

Required Attachments: **Do not combine attachments, add each attachment to the transmittal form separately.*

- Copy of Board Report • Name this attachment “Board Report”
 - Original Agreement/Contract signed by the vendor • Use Adobe Sign to obtain signatures on the Agreement/Contract ONLY • Name this attachment “Agreement”
 - Copy of Galaxy Requisition • Name this attachment “Requisition”
 - Email of Approval from General Counsel *email for general counsel is contractsreview@rccd.edu • Name this attachment “GC Approval”
 - Certificate of insurance from Vendor - **OR** - email from General Counsel stating Certificate of Insurance not Required • Name this Attachment “Insurance”
-

CHEAT SHEET FOR CONTRACT/AGREEMENT PROCESSING – FOR DEPARTMENT ORIGINATOR

Less than \$95,200

1. Ensure funding availability
2. Get agreement from vendor
3. Send agreement to contracts for review and clarification of insurance requirement
4. After approval, get signature from vendor and any required insurance.
(If new vendor, obtain all new vendor forms required)
5. Enter a Type A requisition in galaxy. (Not needed for revenue contracts)
6. Complete A/C transmittal form (attach all required documents)
7. **Send A/C transmittal form through the approval process via email.**
8. When contract number is issued, department originator will contact vendor.
9. When job is completed and services rendered, send the invoice “approved for payment” to accounts payable.
10. Monitor your budget in galaxy to see payment is reflected in your account.

More than \$95,200

1. Ensure funding availability
2. Get agreement from vendor
3. Send agreement to contracts for review and clarification of insurance requirement
4. After approval, get signature from vendor and any required insurance
5. **Prepare a board report and work with president’s office for submittal.**
6. Enter a Type A requisition in galaxy. (Not needed for revenue contracts)
7. Complete A/C transmittal form (attach all required documents, including unapproved board report)
8. **Send it through the approval process via email.**
9. When contract number is issued, department originator will contact vendor.
10. When job is completed or services rendered, send an invoice approved for payment to accounts payable.
11. Monitor your budget in galaxy to see payment is reflected in your account.

CONTRACT TRANSMITTAL APPROVAL PROCESS VIA E-MAIL

LESS THAN \$95,200

1. Route A/C transmittal form with required documents through the approval process via e-mail in this order:
 1. Initiating department manager
 2. College Business Services
 3. Area VP
 4. Business Services VP
 5. College President
 6. District Budget office
 7. Purchasing
2. The President's office will review A/C packet and sign the agreement.
3. The President's office will send the A/C transmittal to District budget office for review, and signed agreement will be included.
4. District Budget office will send A/C form to Purchasing,
5. Purchasing will send the signed contract and signed purchase order back to the initiating department with a copy to College Business Services.
6. The initiating department will share purchase order and signed contract with the vendor and schedule any necessary work.

MORE THAN \$95,200

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 1. Initiating department manager
 2. College Business Services
 3. Area VP
 4. Business Services VP
 5. College President
 6. District Budget office
 7. Purchasing
2. The President's office will review A/C packet and sign agreement and add board report.
3. The President's office will send A/C transmittal form to the District Budget office for review,
4. District Budget office will send A/C transmittal form to Purchasing for issuance of Purchase order,
5. *Purchasing will confirm contract was board approved and obtain agreement signed by VC Business & Financial Services to issue contract purchase order.*
6. Purchasing will send the signed contract and signed purchase order back to the department originator with a copy to Business Services
7. The initiating department will share purchase order and signed contract with vendor and schedule any necessary work.

DURING THE APPROVAL PROCESS:

MANAGER APPROVER WILL:

- Save the A/C Transmittal form to your computer
- Make sure you are using Adobe Acrobat (This is REQUIRED)
- Open and review the documents attached.
- If all documentation is correct, check the completed box in the A/C transmittal form next to your name. Hit save.
- Go back to the e-mail received requesting your approval.
- Reply to All and attach the A/C transmittal you just approved.
- Add the next approver to your e-mail distribution

DEPARTMENT ORIGINATOR WILL:

- Department originator to check Galaxy for issuance of contract purchase order.
- Department originator will continue to follow up with Purchasing.
- Make sure job is not initiated without a contract purchase order.

QUESTIONS?

THANK YOU!!