

Contracts Work Flow

(Simplified)

The Contracts process is in two parts: fill out a form and then a work flow will route it to the required approvers. In a nutshell, the process is like this:

1. Open a Contracts submission form. Fill it out, attach it and any supporting documents that might be required, and submit it.
2. Now go to your department's folder in the repository, make sure all necessary documents are attached, and approve the contract into Work Flow.
3. Work flow will route the contract folder sequentially through a pre-determined series of approvers based on the contract type.
4. After being approved or denied, it will be saved to the repository.

Starting a Contract in Laserfiche

1. Go to the Laserfiche Landing page at <https://edocs.lansingmi.gov>
2. Click on **Start Contract**
 - a. Fill out the form and attach the contract plus any supporting documentation using the Attach buttons. This may include previous contracts, quotes, letters, etc. The contract should already be signed by the other party. The contract file must be in .TIF format to be signable by City approvers. Other documents can be in any format. A new field at the bottom of the form, **RM Document Type**, is to identify the type of contract so that the proper file retention can be applied.
 - b. When everything looks complete, click the Submit button.
3. First, allow a minute or two before proceeding. Sometimes the system is slow. Go back to the repository and browse to your department's folder and find your newly-submitted contract.
 - a. Your contract will be named **Contracts\01 – Pending Approval\<<Department>\Contract <year>-000xxx - <title>**. If it is named something else, then wait a bit longer for the rename to happen.
 - b. Review all the documents in the contract's folder and verify that everything is included and correct.
 - c. If everything looks good, then go to the right pane, make sure the Fields tab is selected, and use the slide bar to go to the bottom. There, you will see an approval field. The contents will read: **"Please Select an Approval Decision."**
 - d. Change the approval field to **"Approved"** and click **OK**.
4. The new contract will now move out into the main work flow.

Approving a Contract

1. There are 6 different types of contracts, each with different routing. The normal route is from submitter to Attorney, to Finance, to Mayor, and finally to Clerk for filing. Most contracts go through all the approvals; but some follow abbreviated paths.
2. Once the contract has been submitted into work flow, the documents are routed from one approver's queue to the next, eventually ending up in **the \Contracts\02 - Approved Contracts** folder. At each step, the queue's members will receive an email notification, and someone in the group must approve it before it can proceed. This is done in the same way that the original submitter approved it into work flow:
 - a. Use a web browser and browse to <https://edocs.lansingmi.gov>, or open the Windows client and skip step (b).
 - b. Open the repository by clicking on **Contract Approval**. (A login will be required.)
 - c. Browse to the folder you want. Under Contracts\01 – Pending Approval\<<your department>
 - d. You can bypass steps a through d by clicking the hyperlink in your notification, except that a login will still be required.
 - e. Open the documents and review until you are ready to make an approval decision. If you need to sign a document, this is when you do it. Laserfiche lets you 'sign' documents by applying a signature stamp. *You can only sign .TIF files.*
 - f. To make your approval decision, you will change the approval field as follows:
 - i. Single click on the folder for your resolution, to put focus on it. *Do not open files within the folder.*
 - ii. In the right pane, make sure the **Fields** tab is selected, then use the slide bar and go all the way to the bottom of the information.
 - iii. Find the Approval Field and select a new approval choice. Approve sends the contract to the next approver, Rework sends the package back to the originating department.
 - iv. Click **OK**.
3. The Clerk is the 'traffic cop' of the process and will probably be the best resource in case of questions.

Contract Requirements

- Contract must be executed before commencement of agreement
- Contractor signs first
- Mayor signs last
- If performance bonds are required, need surety resolution designating attorney-in-fact with authority
- Need corporate resolution or bylaw provision authorizing signer to sign contract
- Need printed signature block with name and title of signer for Contractor
- Check the corporate entity and nature of entity for legitimacy – LARA corporate entity search
- Insurance endorsement page required, must be able to confirm that the City of Lansing is named as an additional insured and that the City will receive a 30-day notice of cancellation

- For licenses, insurance is required to provide City with 30-day notice of cancellation
- Must have correct name of contractor
- Must upload original contract for review of extensions or amendments
- Must upload full agreement along with all exhibits or attachments
- Name uploaded docs correctly
- Must include sole source memos when required
- If the contract came after an RFP, include the RFP
- If a contract needs immediate review, please email Holly Elie at holly.elie@lansingmi.gov

Timelines:

A contract approval becomes overdue if it has been at a single step for more than 3 days. In addition, Attorney's Office requires submissions prior to 4:00 PM if they are to be reviewed that day.