Forms-Based Contracts Process

The Forms Contracts process starts with the submitter filling out a form and attaching the contract and supporting documents to it. This part of the process looks the same as the previous workflow-based process. After submission, the submission form, with attached documents, are routed as a Forms Task from one approver to the next until all required approvals have been collected.

Preliminary

- 1. These instructions can be found by following the Documentation link on the Laserfiche Landing Page at https://edocs.lansingmi.gov
- 2. Vendor signatures must be collected first in most cases.
- 3. To be signable, a contract must be in .tif format. You can accomplish this by scanning using the "scan to Laserfiche" option on your department's MFP, or you can print your contract to the Laserfiche Snapshot printer, which is a virtual printer that converts any electronic document to a .tif.
 - a. To use the Snapshot printer, you must designate the server and repository, which is A182 and CityofLansing.
 - b. You should write the file to your desktop, or some other place where it's easy to find.

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. You will receive a confirmation email containing a hyperlink to your subsequent approval task in Forms. Follow the link; or go to your Forms Inbox, which all licensed users have. It is located at <u>https://edocs.lansingmi.gov/forms</u>. Note the contract is not in the repository at this time.

4. A link will open the task directly, while your inbox will show waiting tasks, which may show other contacts of processes. To open the task from your Inbox, click on it.

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Forms Inbox

- 5. When opened, the task will show the submission form in the left pane and the summary and history in the right pane. You can scroll down to verify the correct information, and click on the attachments to make sure everything is there. You can add more documents using the attach buttons.
- 6. Once you have ensured that the package is complete, click **Verify**.

Contract Approvers

- 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 the Forms process, the documents are routed from one approver's inbox to the next. At each step, the team's members will receive an email notification, and someone in the team must approve it before it can proceed. This is done in the same way that the original submitter approved it into the routing process:
 - a. Follow the hyperlink in the notification, or visit their Forms Inbox, find the contract's task, and open it from there.
 - b. To process a task in Forms, the task must be assigned to you. You can assign the task using the head-and-shoulders icon near the top of the display.
 - c. Open the documents and review until you are ready to make an approval decision. For signer/approvers, the contract document will open in an i-frame window within the submission form, and can be signed from there, using a signature stamp. *Signing can only be done to .TIF files.*

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Contract document is shown in an i-frame

- d. If the decision is to rework, then click the **Rework** button at the bottom without signing; otherwise apply your signature stamp and then click **Approve**.
- 3. Only after all approvals are collected will the contract be saved to the repository; before that it only exists as a database entry. This means that all additions, removals, or replacements need to be done through the attach/x buttons on the form.
- 4. The Clerk is the 'traffic cop' of the process and will probably be the best resource in case of questions.

<u>Contract Status</u> - To check the status of a contract, there is a pre-built report that you can run. From your Forms home page (<u>https://edocs.lansingmi.gov/forms</u>) you can choose **Reports** from the menu bar.

Laserfiche Forms [®] Inbox Start Process Reports Design Manage	Monitor
Reports by Process: All Processes -	
Insights Custom Reports Saved Snapshots Report Schedules	
Please select a process to view a report.	
PROCESS OVERVIEW	PERFORMANCE
Get insight into your process.	Track how long your processes take to complete.
View report	View report

From there, select **Custom Reports**, and then select **Contract Status Report**. When the report comes up, enter a term in the search field. This can be the initiator, the vendor name, or some other term that was in the submission form.

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The current step, along with the current assignment, will be displayed.

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.