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# CONTRACTS MODULE END USER CHECKLIST CAL - REVENUE AGREEMENTS

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## 1. REVENUE AGREEMENTS – CONTRACT ORIGINATOR

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- Edit** your contract in CMUPCM: enter the end date of the contract.
- Save** your changes.
- As a result of the edit and save, **Workflow will now be initiated**, which is the approval process. This is the electronic signature process that is replacing the paper ADM-29.
- Ensure that you have required signatures** on the original of the contract.
- Review for completeness and correctness** of contract.
- Scan and Attach** the contract and exhibits.
- Check off completed tasks** in Contract Tracking CMUPTK.
- Self-Approve** your contract when it is ready for Departmental Approval.
- If Section III Requiring BOS Approval:** Route signed paper contract and attachments to **CAO**.
- If BOS Approval not required:** Route signed paper contract and attachments to **CAO**.
- You may **review** the workflow status of your contract by either viewing the Pending Approvals tab in CMUPCM **OR** running the report **SCZCM1000 ADM-29 Workflow Report** for your Contract #.
- Do not send **SCZCM1000 ADM-29 Workflow Report** to CAO or Clerk of the Board (COB).
  - ❖ CAO will print ADM-29 after CAO approval if it's a Section III going to the Board.
  - ❖ COB will print ADM-29 after workflow is complete for all other contracts.
  - ❖ Once approval is final System will generate an email and certified copy of ADM29 to originator, and Auditor.

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## 2. DEPARTMENTAL APPROVER

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- Verify that the contract and exhibits are attached, required signatures are on the contract. Review for completeness and correctness of contract.
- Approve Contract** either from Pending Tasks in OneSolution Desktop or on the Pending Approvals tab of the contract.

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## 3. CAO AND OTHER APPROVALS

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- Depending on the type of contract, different levels of approvals will be required. You can refer to the document "Contracts End User Guide: Attachment I" for the different CALSEC types and the required approvals for each.
- You may **review** the workflow status of your contract by either viewing the Pending Approvals tab in CMUPCM **OR** running the report **SCZCM1000 ADM-29 Workflow Report** for your Contract #.
- Clerk of the Board will continue to be the repository for all original contracts and will print and file a final paper copy of the fully approved ADM-29 (**SCZCM1000 ADM-29 Workflow Report**) with the contract.

Once the approval process is complete, the system will send a copy of the ADM-29 Workflow report to the Originator, the Auditor, and the Purchasing Manager.

**Revenue agreements will not be pushed to PO.**

**If you have questions or problems, first refer to the Contracts Module End User Guide and End User Checklists. If you still cannot resolve the problem, send an e-mail to [AudOneSolution@santacruzcounty.us](mailto:AudOneSolution@santacruzcounty.us).**

