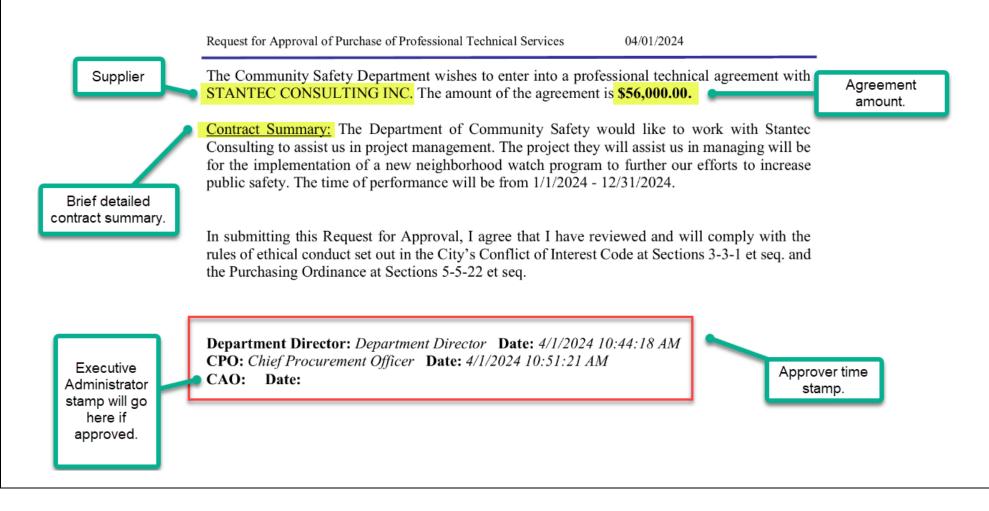
## **DocuSign CLM Executive Review**

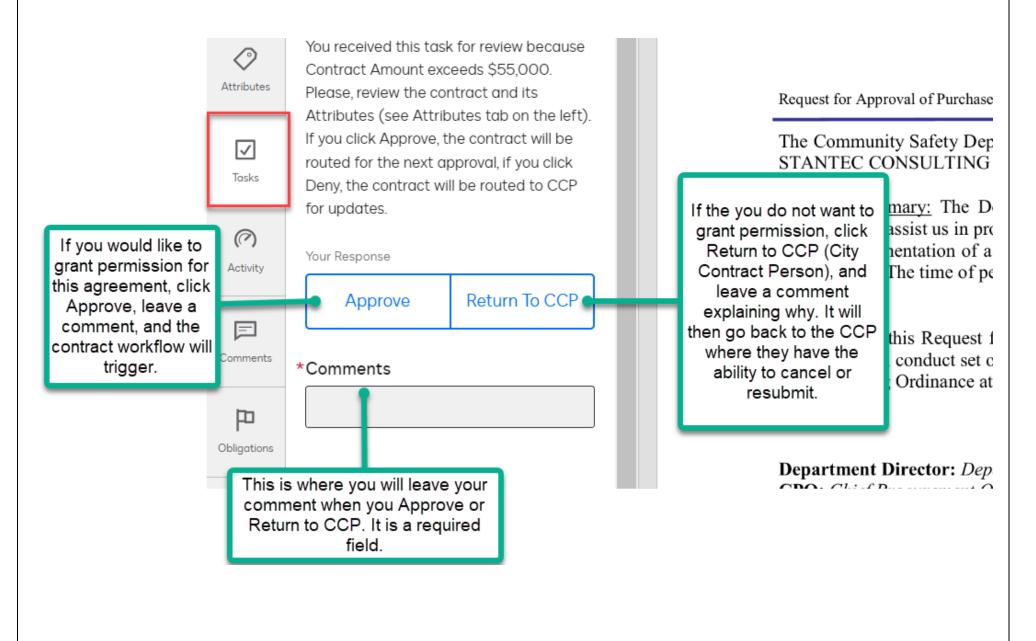
DocuSign CLM (Contract Lifecycle Management) is the approval module within DocuSign that happens before execution in DocuSign eSignature. The Executive Administrator will come into the workflow for any agreements that are above \$55,000. The Approval to Proceed (formerly known as the CAO Memo) is the initial workflow where the Department is requesting permission to execute a contract.

**<u>NOTE</u>**: The Approval to Proceed is a summary of the contract requested. Until you approve, there is <u>**not**</u> a draft of the contract. Once approved, CLM moves to the next step of generating a template and sending it through the workflow.

## APPROVAL TO PROCEED LAYOUT



## APPROVER SCREEN



## **DocuSign CLM Executive Review**

E-signature is a separate module from CLM within DocuSign. Once the contract is approved in CLM, it flows into E-Signature for execution. Executive Administrators are in a signing group. If you accidentally open an envelope that isn't for you to sign, please follow the steps below.

When in the envelope, click on "Other Actions" on the top right of the envelope, then click "Finish" later. <u>NOTE</u>: If you do not do this, and just exit the window, it will <u>not</u> allow other Executive Administrator in that signing group to access the envelope.

view the documents	below.	FINISH	OTHER ACTIONS +
	QQ ± = 2	Finish Later	
START	DocuSign Envelope ID: 33F725C1-2C22-4244-8CE9-B85EFBCC81E3 DEMONSTRATION DOCUMENT ONLY PROVIDED BY DOCUSIGN ONLINE SIGNING S 999 3rd Ave, Suite 1700 • Seattle • Washington 9 www.docusign.com		neone Else
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