

## DocuSign CLM: Where's My Contract?

Below are steps on how you check the status of your PT (Professional Technical) contract in the DocuSign CLM module.

REMINDER - There are five workflows from beginning to end on a PT agreement:

1. Approval to Proceed
2. Contract Draft – Departmental Workflow (Fiscal, Risk, Director)
3. Contract Draft – Legal Workflow (Department Assistant City Attorney (DAC) and Purchasing Assistant City Attorney (PAC)
4. Contract Draft – External Review (Vendor)
5. Execution – eSignature Signing

### APPROVAL TO PROCEED STATUS

No matter the workflow the contract may be in, the easiest way to access the status of your contract is to drill down to your agreement following these steps.

In this example, the Approval to Proceed has not been completed, so it shows it's with the CPO (Chief Procurement Officer).

**NOTE:** Since the Approval to Proceed has not been completed, the contract will default to the Director as the Actor since they are the first approval. Ignore that status until the Approval to Proceed is completed.

The screenshot shows the DocuSign CLM interface. The sidebar on the left contains a file tree with the following structure:

- Recently Accessed Documents
- Demo - City of Albuquerque CLM+
  - Users
  - \_Admin
  - Admin
  - Contracts
  - Legal Services
  - PT Services
    - Animal Welfare
    - Arts and Culture
    - Aviation
    - CAO
    - City Clerk
    - City Council
    - Community Safety
      - Community Safety
        - 2023PT00000150\_REBECCA
        - 2024PT00000461\_STANTEC
        - 2024PT00000464\_TERRIER
        - 2024PT00000472\_IVAN LOU
        - 2024PT00000473\_SUNDEEF
        - 2024PT00000477\_NEW MED
        - 2024PT00000478\_ABQ MOV
        - 2024PT00000479\_KATHLEE
        - 2024PT00000480\_SUNSET
        - 2024PT00000481\_AMERIDE

The main content area displays the contract details for "2024PT00000481\_AMERIDERM LABORATORIES LTD". The table below shows the items in the contract:

Type	Name	Description	Modified By
Approval to Proceed	Approval to Proceed_2024PT00000481_AMERIDERM LABORATORIES LTD.docx	Status: Approve Step; Actor: CPO	Workflow
Test (12).docx	Test (12).docx	Status: Approve Step; Actor: Director	koney@cabq.gov
2024PT00000481_AMERIDERM LABORATORIES LTD.docx	2024PT00000481_AMERIDERM LABORATORIES LTD.docx	Status: Approve Step; Actor: Director	koney@cabq.gov

## CONTRACT DRAFT STATUS




In this example, the Approval to Proceed shows completed, and now the contract draft shows it's with Fiscal. This is where you can check if it's with the departmental approvers, Legal or external review.

DocumentsTasksReportingContactsAdminActions

Demo - City of Albuquerque CLM+ / Contracts / PT Services / Community Safety / Community Safety /

2024PT00000481\_AMERIDERM LABORATORIES LTD

Total Items: 3

<input type="checkbox"/>	Type	Name	Description ↑	Modified By
<input type="checkbox"/>	 ▾	Approval to Proceed_2024PT00000481_AMERIDERM LABORATORIES LTD.docx	Status: CPO <b>Review completed</b>	Workflow
<input type="checkbox"/>	 ▾	Test (12).docx	Status: Dept Approve Step; Actor: Fiscal	koney@cabq.gov
<input type="checkbox"/>	 ▾	2024PT00000481_AMERIDERM LABORATORIES LTD.docx	Status: Dept Approve Step; Actor: <b>Fiscal</b>	koney@cabq.gov

Total Items: 3

A way to drill down further into the status of the agreement is by clicking on the file, either the Approval to Proceed or the contract draft and click the Activity tab. The example here shows it's with Risk for their review.

2024PT00000481\_AMERIDERM... (Version 3 - Current)

  
Info

  
Activity

  
Comments

  
Obligations

### Workflow Activity

**Current Stage**  
RISK CONTRACT DEPARTMENT APPROVAL  
Waiting for Risk to make a choice

Sent  
0 days ago

Viewed  
0 times

Apr 23

FISCAL CONTRACT DEPARTMENT APPROVAL  
Kathleen Oney selected 'Approve'

☐ Compare with: Version 2 - 4/23/2024 

### AGREEMENT

THIS AGREEMENT ("Agreement") is made and entered into by and between the City of Albuquerque, New Mexico, a municipal corporation ("City"), and AMERIDERM LABORATORIES LTD LLC, 600 2nd St. NW Albuquerque, NM ("Contractor").

### RECITALS

WHEREAS, the City desires to engage the Contractor to provide certain services; and

## E-SIGNATURE

When a contract is out for signature, it locks the agreement and shows the Actor Step as CCP because they were the ones to route for signature in the eSignature module.

City of Albuquerque / Contracts / PT Services / Economic Development / Contract Purchases /

### 2024PT00000232\_GREENVISIONX

Total Items: 5

<input type="checkbox"/>	Type	Name ↓	Description	Modified By
<input type="checkbox"/>	Approval to	Proceed_2024PT00000232_GREENVIS	Status: CPO Review completed	Workflow
<input type="checkbox"/>		6. GVX_MBDA_Proposal_1.2 (2).pdf	Status: Signature; Actor: CCP	sofiabajana@cabq.gov
<input type="checkbox"/>		4. Federal Procurement Checklist_Green VisionX.pdf	Status: Signature; Actor: CCP	sofiabajana@cabq.gov
<input type="checkbox"/>		2024PT00000232_GREENVISIONX.pdf	Status: Signature; Actor: CCP	sofiabajana@cabq.gov
<input type="checkbox"/>		2. Sam search - no debarment.pdf	Status: Signature; Actor: CCP	sofiabajana@cabq.gov

Total Items: 5

2024PT00000232\_GREENVISL... (Version 13 - Current)

Info

Attributes

Tools

**Activity**

Comments

Edit PDF

Obligations

#### Workflow Activity

Current Stage  
OUT FOR SIGNATURE  
Waiting for Jennifer Bradley to sign

Sent to Jennifer Bradley 5 days ago

Due in 993 days

Jennifer Bradley viewed 0 times

Apr 23  
OUT FOR SIGNATURE  
Lauren Keefe signed

Apr 22  
OUT FOR SIGNATURE  
Max Gruner signed

Apr 18  
OUT FOR SIGNATURE  
info@greenvisionx.com signed

OUT FOR SIGNATURE  
Mariel Willow signed

OUT FOR SIGNATURE  
Monica C. Ewing signed

DocuSign Envelope ID: 8D7292C1-1CC2-48CD-9B8E-C61838EC2

THIS AGREEMENT ("Agreement") is made this 1st day of April, 2024, by and between the City of Albuquerque, New Mexico, a municipal corporation, ("City") and the City of Albuquerque, New Mexico, a municipal corporation, ("City").

WHEREAS, the City's Ecomor with the U.S. Department of Commerce will continue the development and operation support Minority Business Enterprises and

WHEREAS, the MBDA promotes private sector programs, policies, and MBDA Business Centers; and

WHEREAS, the continued development Business Center ("Center") would allow MBDA; and

WHEREAS, in response to the Opportunity Number MBDA-OB-20 Business Center grant; and

WHEREAS, the City was awarded "Award", additional funding appropriate MB21OBD8050197-T1-01 for the purpose ("RMBEs") in Albuquerque, in the state of New Mexico;

WHEREAS, this non-competitive business center to expand the reach in and expanding to Northern Rural New Mexico;

WHEREAS, the grant funding, September 1, 2023, through August 31, 2024;

WHEREAS, the Contractor has optimization, personalize & customize

If you click on the agreement (circled in green), you can go to the Activity tab to see who's queue it's in for signature including who has already signed.