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.

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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.

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.

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.

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.