

Updated Agreement and Contract Transmittal Form and Approval Process

Overview and Submitting a Form and Approving

Spring 2025

The Current CTF Process

- Different forms
- Different processes
- Dependency on user know-how and thoroughness
- Complexity of PDF Packet
- Lack of control
- Lack of visibility

The New Process















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My Apps Search apps

BS- Esmeralda Apps

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|--|--|--|---|---|--|--|
|  LISERSV - (lists.rccd.edu) |  Loop |  Mediasite |  OnBase |  OneDrive |  OneNote |  Outlook |
|  |  |  |  |  |  |  |

OnBase

- Enterprise Content Management (ECM)
- Organizes, manages and optimizes content and processes
- A platform.

Submitting the CTF

- Web-based electronic form
- Link via email, documentation, or bookmark
- Just click and go

Submitting the CTF

After form is Saved or Submitted

- Submitter receives an email with a link back to the form
- Submitter receives an email as the form moves through the approval process
- Submitter receives an email after form is fully approved

How to Submit the new Agreement/Contract Transmittal Form

- No specific access required only access to the link [OnBase Link](#) (testing link)
- Training was provided to A-Team 5/13/2025

RCCD

RIVERSIDE COMMUNITY
COLLEGE DISTRICT

MORENO VALLEY COLLEGE | NORCO COLLEGE | RIVERSIDE CITY COLLEGE
AGREEMENT/CONTRACT (A/C) TRANSMITTAL FORM

Current Status

Instructions

Details

Approvers

Attachments

Save or Submit

Submitting an Agreement/Contract Transmittal Form

Start the form on the **Details** page and complete that before moving on to the **Approvers** and **Attachments** pages.

Ensure **all** required fields (indicated with a red *****asterisk) are filled in and accurate before **saving** or **submitting** the form.

Provide all required attachments as indicated on the Attachments page. Attachments must be in PDF format.

Use the **Save or Submit** tab for guidance and to save or submit the form.

Click the Continue button when you are ready to start the form >>

Continue

Details Tab

Current Status

- Instructions
- Details
- Approvers
- Attachments
- Save or Submit

Form Type *

☐ College ☐ District

Submitter Information

This is the individual who will receive email verification of submission, all status updates, and notification of approval.

| | |
|--|--------------------------|
| Submitter Name (enter as FirstName LastName) * | Submitter Email * |
| <input type="text"/> | <input type="text"/> |
| Title | Department |
| <input type="text"/> | <input type="text"/> |

Vendor Information

| | | |
|-----------------------|--------------------------------|--|
| Vendor Name * | Vendor Contact (Name) * | Additional Vendor Notes <input type="text"/> |
| <input type="text"/> | <input type="text"/> | |
| Vendor City * | Vendor Title | |
| <input type="text"/> | <input type="text"/> | |
| Vendor State * | Vendor Email * | |
| <input type="text"/> | <input type="text"/> | |

Agreement Information

| | | |
|--|--|---|
| Agreement/Contract Type * <input type="text"/> | Description of Goods and Services For all amendments, include the amendment number and original Contract PO number (if applicable). * | Budget Code (if more than one, click Add and indicate % split in Notes) <div>Budget Code (use format: ##-AAA-####-#-####-####-####) or type "Foundation Account" in field if no budget code <input type="text"/></div> <div>Add</div> |
| Be careful to choose the correct Contract Type: The choice will affect other fields and attachments required. | <input type="text"/> | |
| Time Period A/C is in effect Please note: only "Standard Date Range" provides a "To" date option. For all other contracts, the "To" date will be left blank. | Software or IT Requiring Integration For contracts for ANY software, hardware or 3rd party web services that require integration with District Information Technology & Learning System resources, an additional attachment of the Approval from Associate Vice Chancellor, Information Technology & Learning Systems is required. Please indicate if this is this type of software/IT related purchase. | Budget Notes <input type="text"/> |
| Time Period Type (you must select one) * | IT Related Agreement * | |
| <input type="text"/> | <input type="text"/> | |
| From | | |
| <input type="text"/> | | |
| To | | |
| <input type="text"/> | | |
| Note: Per Ed Code 17596, Contracts are not to exceed five years. | | |
| Time Period Notes/Clarifications <input type="text"/> | | |

>>Approvers Page

Approvers Tab



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- Instructions
- Details
- Approvers
- Attachments
- Save or Submit

Initiating Department Approval

Initiating Department Manager ensures that all A/C information is accurate, and that all required documents have been attached.

Initiating Department Manager Name *

Title

Email

NOTE: Names are ordered by First Name. Select the Department Manager Name from the list, don't simply type it in.

If the name is not in the list you may fill the fields manually. In that case, please click the check box below.

☐ Initiating Department Manager not in drop-down menu

District Approvals

Department Administrator

Department Administrator confirms that all A/C information is accurate, and all required documents have been attached.

Name *

Title

Email

District Business and Financial Services - Budget Analyst

Budget Analyst confirms budget for Agreement/Contract

Select the Budget Analyst per the following:

District Office ► Michele Arnold

Moreno Valley College ► Anthony Bush

Norco College ► Christina Alarcon

Riverside City College ► Ana Cisneros or Josie Essien

Name *

Email

Vice Chancellor - Business and Financial Services

Vice Chancellor, Business & Financial Services confirms A/C is signed on behalf of RCCD.

Name *

Email

Assistant

Assistant Email

District Business and Financial Services - Purchasing Specialist

Purchasing Specialist confirms Purchase Order has been generated and sends completed notice to Initiator/Submitter.

Purchasing Specialist assignment based on Vendor Name:

#s & A-C ► Amanda Vazquez

D - J ► Melinda Chavez

K - Q ► Angela Aguilar

R - Z ► Melissa Griffith

Name *

Email

>>Attachments Page

Attachments Tab



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Current Status

Instructions Details Approvers Attachments Save or Submit

Standard Attachments (0)

Original Agreement/Contract unsigned or signed by vendor only (if more than one document makes up the agreement, combine into a single PDF before uploading) *

Attach Agreement

Certificate of Insurance from Vendor or email from General Counsel stating Certificate of Insurance not required *

Attach Insurance Statement

General Counsel Approval (note: email for general counsel is contractsreview@rccd.edu) *

Attach General Counsel Approval

Agreement Notes

(e.g., list page(s) where signatures are required)

Certificate of Insurance Notes (if necessary)

General Counsel Approval Notes (if necessary)

Go to Save/Submit

Save or Submit Tab

Current Status

Instructions

Details

Approvers

Attachments

Save or Submit

Select **Save Draft** to save a draft of your form without submitting it/inititating the approval process.
Use this option to save your progress and return to complete it and **Submit** at a later time.
NOTICE: *Unsubmitted forms will be deleted after 30 days.*

Select **Submit** once you have completed all tabs in their entirety and are ready to officially submit the form and inititate the approval process.

You will receive an email with a link to return to the form.

Choose one*

☐ Required Attachments Missing
(check this box if you need to **Save** the form without all required attachments)

OnBase for Approvers

OnBase (OnBase test)

File Home Workflow

Change Layout Close This Layout Secondary Viewer Primary Viewer Layout

Refresh Apply Filter Auto Work Override Auto-feed View

Route Item Take Ownership Release Ownership Execute Script Task Actions

Show Documents Folder Update/Add Agreement Approve/Forward Remove from Workflow Tasks

Life Cycles

Search...

Combined Inbox

A/C Forms Process

Inbox

| Icon | Name | Entry Date | Workflow Life Cycle | Workflow Queue |
|------|--|----------------------|---------------------|--------------------|
| | A/C Transmittal - Vendor: WEDNESDAY INC. - Submitter: TIM KANALEY (GXY:) - 4/2/2025 | 4/2/2025 9:08:21 AM | A/C Forms Process | Department Manager |
| | A/C Transmittal - Vendor: ALL OCCASION RENTAL - Submitter: DENISE TERRAZAS (GXY: 12345) - 4/2/2025 | 4/2/2025 10:00:16 AM | A/C Forms Process | Department Manager |

A/C Forms Process

Inbox Related Items User Interaction

OnBase for Approvers

This new process will replace the A/C transmittal packet currently done in the Adobe Acrobat form.

Project Timeline:

- Monday May 12th- Testing begins
 - Tuesday May 13th – Training provided to the A-Team
 - Wednesday May 14th- Training provided to Management Team
 - Testing will continue for the month of May.
-
- June 2nd, Pilot begins at Norco
All A/C transmittals for 24/25 or 25/26 will be submitted via OnBase

Training Materials have been uploaded to the Mustang Forms SharePoint site.

All Managers need to download Unity Client

[.Unity Client Test End User Instructions](#)

THANK YOU
for your attention