Designer initial and supplemental Agreement

Project Manager
1) Informs Designer of being selected
2) Creates and sends information package

Information Package:
- Contract check list
- SBC-1
- Program statement document
- Project master schedule
- Example SBC-7
- Designer fee attachment

CPCA Support
1) Creates Agreement form and returns to Project Manager for review
2) Adds 5 counterparts of Agreement form after Project Manager approval
3) 6 counterparts to Designer w/ ACH & W-9 forms

State Architect
1) Signs 1 counterpart
2) Sends to CPCA Support

Business and Finance
1) Reviews documents
2) Verifies Funds
3) Reviews for form and Legality with Contracts Office
4) Obtains Contract Office signature
5) Obtains Vice President of Business and Finance signature
6) Issues Purchase Order
7) Initials Routing memo & forwards

Designer
1) Reviews and signs counterparts
2) Sends to CPCA support:
   - 6 Signed counterparts
   - ACH form
   - W-9
   - Certificate of Insurance

Project Manager
1) Receives and reviews check list
2) Fills out request for Agreement form and gives to CPCA support

Designer
1) Fills out check list and sends back to Project Manager
2) Reviews other information

Project Manager
1) Reviews and approves Agreement form
2) If initial agreement, logs offering date into PITS after approval

CPCA Support
1) Receives counterparts & attachments
2) Checks for errors and omissions
3) Creates return cover letter and routing memo
4) Cover letter, routing memo, and 6 counterparts, to Project Manager

State Architect
1) Signs 1 counterpart
2) Sends to CPCA Support

Business and Finance
1) Reviews documents
2) Verifies Funds
3) Reviews for form and Legality with Contracts Office
4) Obtains Contract Office signature
5) Obtains Vice President of Business and Finance signature
6) Issues Purchase Order
7) Initials Routing memo & forwards

Designer
1) Fills out check list and sends back to Project Manager
2) Reviews other information

Project Manager
1) Receives and reviews check list
2) Fills out request for Agreement form and gives to CPCA support

Designer
1) Fills out check list and sends back to Project Manager
2) Reviews other information

Project Manager
1) Receives the counterpart plus the 1 signed by State Architect
2) Enters execution date in PITS
3) Routes counterparts to CPCA file

Designer
1) Fills out check list and sends back to Project Manager
2) Reviews other information

Project Manager
1) Receives and reviews check list
2) Fills out request for Agreement form and gives to CPCA support

Designer
1) Fills out check list and sends back to Project Manager
2) Reviews other information

Business and Finance
2 counterparts w/ ACH & W-9

Note
with supplemental agreements
1 ACH (automated clearing house) and W-9 (federal tax reporting) forms normally are required only if Designer undergoes a change in name, banks, or tax status.
2 Insurance certificates normally are required only if existing certificates have expired.

Designer Agreement execution Flowchart
1 December 2017