



# DocuSign CLM Supplier Review Job Aid

The City of Albuquerque is using a new system for Professional/Technical Agreements. This means we will be using DocuSign for two stages of the agreement process. (1) CLM (Contract Life Management) will be used for the review and (2) DocuSign eSignature will be used for signing the agreement.

## STAGE 1 – The Review **(NOTE: Please do not print out the agreement, sign it, and upload it with a wet or digital signature during this stage. Signing will come later).**

1. When the agreement is ready for the supplier review, they will receive an email that looks like this, with instructions:

The screenshot shows an email from Kathleen Oney via DocuSign CLM. The subject line is "CLM - PT Services contract for [redacted] is waiting for Review". The email body contains the following text:

**DocuSign**

**You have a document for review**

Hello, Please follow the link below to access the PT Services for your review. Please submit your feedback within DocuSign CLM within 5 business days. [Link to CLM Task](#)

- koney@cabq.gov

**There are two ways to review:**

<b>Reply to this email</b>	<b>Review the document online</b>
Download the attachments, review them and then reply directly with any new versions.	Use our secure review platform to view and edit the documents right from your browser.
	<a href="#">Review online</a>

**2024PT00000423, [redacted].docx**  
Due on: 4/22/2024

**Callout boxes:**

- Top:** "The email subject will show that it's coming from CLM" (points to the subject line).
- Second:** "Below the subject, it will tell you who from the City of Albuquerque is sending this to you." (points to the sender name).
- Third:** "These are your instructions on how to review, edit, and send the document back." (points to the review instructions section).
- Bottom:** "This is the contract number with the vendor name following." (points to the document name).

2. You can choose one of the two ways to review the document.

- a. **Option 1** – Reply to this email.
  - i. Click on the attachment provided in the email. Download the document to your computer, and make your edits.



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– koney@cabq.gov

### There are two ways to review:


#### Reply to this email

Download the attachments, review them and then reply directly with any new versions.

#### Review the document online

Use our secure review platform to view and edit the documents right from your browser.

[Review online](#)

 You can only reply to this email once. Make sure you've attached all your feedback or changes before you reply.

2024PT00000423\_ [redacted].docx  
Due on: 4/22/2024

One attachment




[← Reply](#) [→ Forward](#) 


- ii. When your edits are completed, “Reply” to the email, attached the revised document, and click “Send.”  
NOTE: Do not change the name of the document.

- iii. Then you will receive an email that your review has been completed.

Thanks for your feedback on 2024PT00000423\_ [redacted] [Inbox](#)

 **Kathleen Oney via DocuSign CLM**  
Your review is complete. Thank you for reviewing the document below. Your feedback was submitted to Kathleen Oney on 3/22/2024. [redacted]

---

 **Kathleen Oney via DocuSign CLM** <reviewuat@docusign.net>  
to me ▾

**DocuSign**

**Your review is complete**

Thank you for reviewing the document below. Your feedback was submitted to Kathleen Oney on 3/22/2024.

2024PT00000423\_ [redacted]  
Updated with: 2024PT00000423\_ [redacted]}.docx  
Reviewed on: 3/22/2024

[View](#)

\*\*\*

- b. **Option 2** – Review Online
  - i. Click the Review Online Link

CLM - PT Services contract for [redacted] is waiting for Review > Inbox x

Kathleen Oney via DocuSign CLM <reviewuat@docusign.net>  
to me  
...

**DocuSign**

**You have a document for review**

Hello, Please follow the link below to access the PT Services for your review. Please submit your feedback within DocuSign CLM within 5 business days. [Link to CLM Task](#)

- koney@cabq.gov

**There are two ways to review:**

<b>Reply to this email</b> Download the attachments, review them and then reply directly with any new versions.	<b>Review the document online</b> Use our secure review platform to view and edit the documents right from your browser. <a href="#">Review online</a>
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**⚠ You can only reply to this email once. Make sure you've attached all your feedback or changes before you reply.**

2024PT00000423, [redacted].docx  
Due on: 4/22/2024

The email subject will show that it's coming from CLM

Below the subject, it will tell you who from the City of Albuquerque is sending this to you.

These are your instructions on how to review, edit, and send the document back.

This is the contract number with the vendor name following.

- ii. The system will show you the three steps it takes to review online:

### How to Complete Your Review

There are a few ways you can update or comment on this document to complete your review for Kathleen Oney.

How to complete your review:

1. Download or read the document in the browser
2. If you update the document, upload a new version
3. Add notes or a message in the Comments field

Got it

Not kathleenoney@gmail.com? [Add your information](#)

- iii. Click “Got it.” Then it will take you to a preview screen to view the document.
1. IF YOU HAVE CHANGES: Click the “Download” icon, and make your changes in word.
  2. IF YOU DO NOT HAVE CHANGES: Click “Next.”


1 Review — 2 Edit — 3 Comment

### Review

Instructions

To begin, download the document(s) or review in the browser. When you are done reviewing, continue to the next step.

1 Document for Review

2024PT00000423... 

Download icon.

Next

#### AGREEMENT

THIS AGREEMENT (“Agreement”) is made and entered into by and between the City of Albuquerque, New Mexico, a municipal corporation (“City”), and FRIENDS OF THE ORPHAN SIGNS Individual, 123 Main St. Albuquerque, NM 87120 (“Contractor”).

#### RECITALS

WHEREAS, the City desires to engage the Contractor to render certain services in connection therewith and the Contractor is willing to provide such services, I need more things

NOW THEREFORE, in consideration of the premises and mutual obligations herein, the parties hereto mutually agree as follows:

1. **Scope of Services.** The Contractor shall perform the following services (“Services”) in a satisfactory and proper manner, as determined by the City:  
SCOPE OF SERVICES
2. **Term of Agreement.** The term of this Agreement shall start on the date of final execution of this Agreement and shall end on December 31, 2024, unless otherwise terminated as provided herein.
3. **Compensation and Method of Payment.**
  - A. **Compensation.** For performing the Services specified in Section 1, the City agrees to pay the Contractor up to the amount of \$50,000.00, which amount excludes any applicable gross receipts tax. This amount shall constitute complete compensation for the Contractor’s Services, including all expenditures made and expenses incurred by the Contractor in performing the Services.
  - B. **Method of Payment.** Such amount shall be payable at the rate of twenty three dollars and No/100 Dollars \$23.00 per hour, which rate excludes any applicable gross receipt tax. Payments shall be made to the Contractor for completed Services upon the City’s receipt of Contractor’s properly documented requisitions for payment as determined by the budgetary and fiscal guidelines of the City and on the condition that the Contractor has accomplished the Services to the satisfaction of the City.
  - C. **Appropriations.** Notwithstanding any other provision in this Agreement, the terms of this Agreement are contingent upon the City Council of the City of Albuquerque making the appropriations necessary for the performance of this Agreement. If sufficient

iv. After above steps.

1. **IF YOU HAVE CHANGES:**

Click on the “Select File” button and upload your edited document from your document library, then click “Next.”

**NOTE:** Do not change the name of the document.

2. **IF YOU DO NOT HAVE CHANGES:**

Click “Skip.”

The screenshot shows a document review interface. At the top, there is a progress bar with three steps: 'Review' (checked), 'Edit' (active), and 'Comment'. Below this is the 'Edit' section. It contains instructions: 'If you edited any document, upload your new version. If you do not have any edits to make, please select "Skip" to finish your review.' Underneath is the 'Upload New Version' section, which includes a dashed box with the text 'Drag and drop here' and a 'SELECT FILE' button. At the bottom of the 'Edit' section are two buttons: 'Back' and 'Skip'. A green callout box with a white background and a black border contains the text 'Upload your edited document here. Do not change the name of the document.' Two green arrows point from this callout box: one to the 'SELECT FILE' button and another to the 'Skip' button. To the right of the 'Edit' section is a preview of the document content, which includes sections for 'AGREEMENT', 'RECITALS', and numbered sections for 'Scope of Services', 'Term of Agreement', and 'Compensation and Method of Payment'.

**Edit**

Instructions

If you edited any document, upload your new version. If you do not have any edits to make, please select "Skip" to finish your review.

Upload New Version

Drag and drop here

SELECT FILE

Back Skip

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C. **Appropriations.** Notwithstanding any other provision in this Agreement, the terms of this Agreement are contingent upon the City Council of the City of Albuquerque making the appropriations necessary for the performance of this Agreement. If sufficient

- v. V. Enter your comments, and then click Finish:

Review — Edit — **3** Comment

### Comment

Instructions

Add comments for your review here. Once your review is complete, your comments and/or document(s) will be passed along to Kathleen Oney or routed to the next reviewer.

\*Comments

My review is completed.

Back Finish

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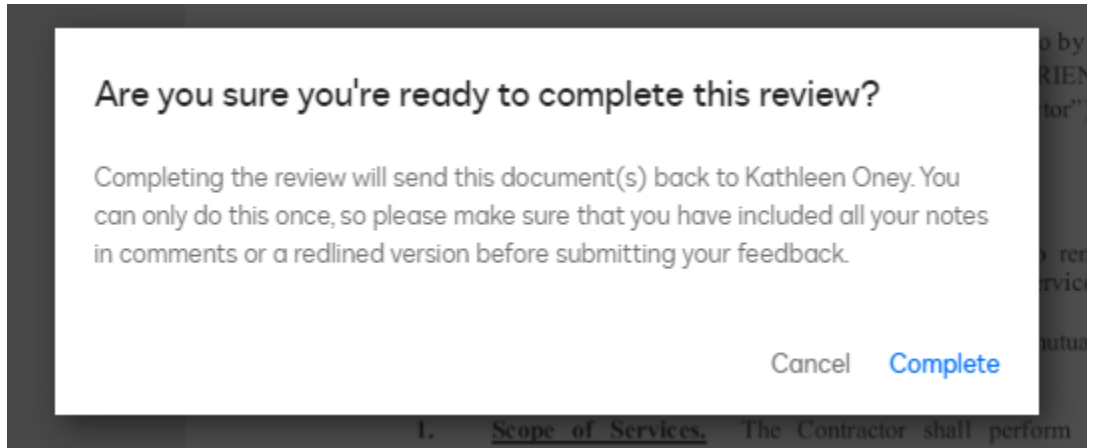
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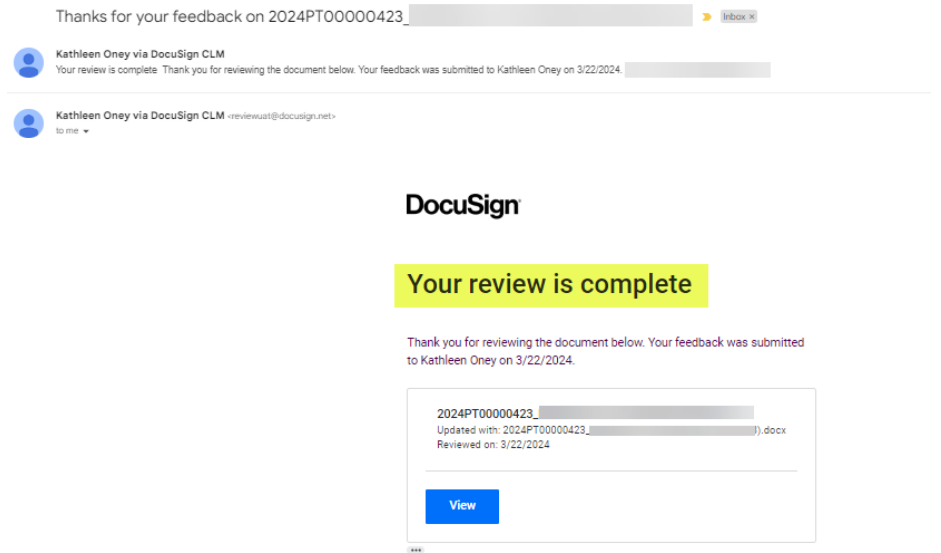
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- vi. The system will make sure you are ready to complete. When ready, click “Complete.”

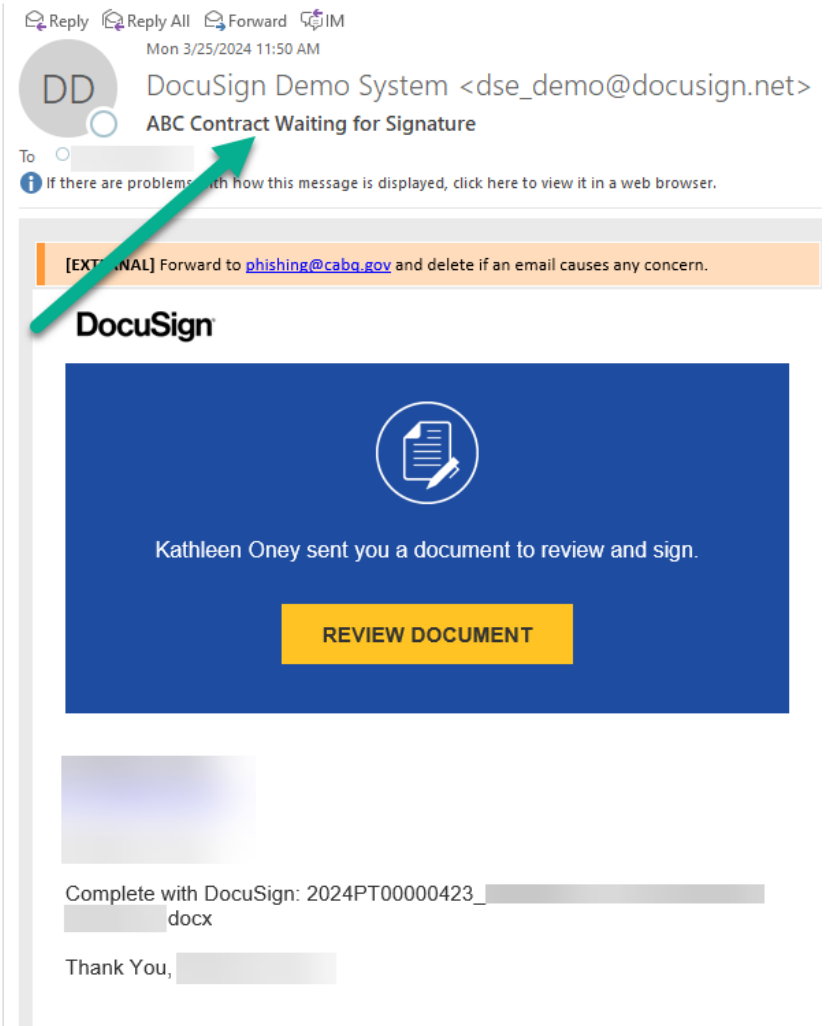


- vii. Then you will receive an email that your review has been completed.

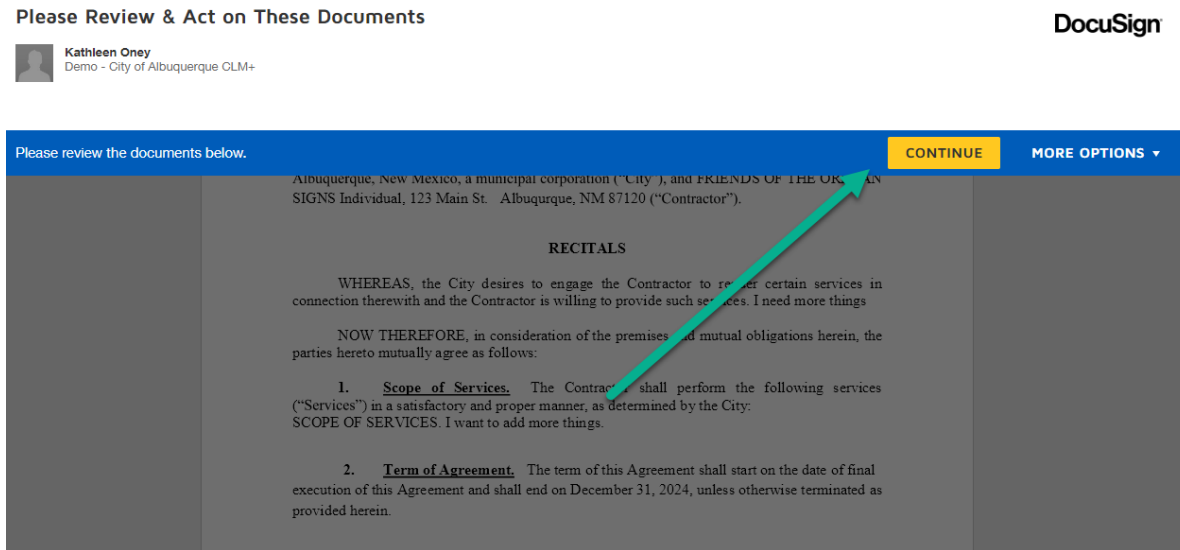


## STAGE 2 – Signing

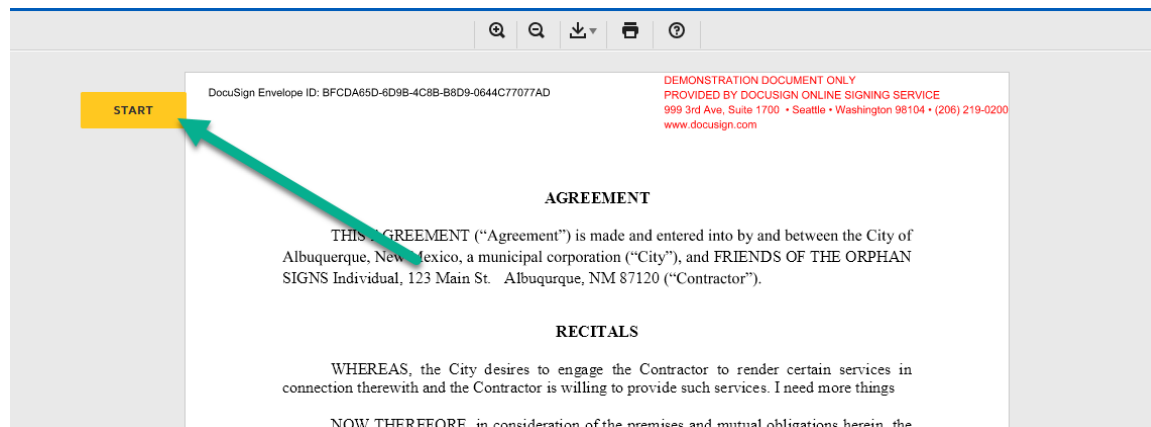
1. You will receive an email notification from DocuSign indicating that it is waiting for your signature. Click “Review Document.”




2. It will then take you to DocuSign eSignature. Click on “Continue.”



3. Click “Start” to the top left of the page.





4. Click on the “Sign” sticker.

Approved By:  \_\_\_\_\_ Date: 3/25/2024  
Name: \_\_\_\_\_ Title: President

**CITY OF ALBUQUERQUE:**

Approved By: \_\_\_\_\_ Date: \_\_\_\_\_  
By: \_\_\_\_\_

5. Click “Finish.”

 Approved By:  \_\_\_\_\_ Date: 3/25/2024  
Name: \_\_\_\_\_ Title: President

**CITY OF ALBUQUERQUE:**

Approved By: \_\_\_\_\_ Date: \_\_\_\_\_  
By: \_\_\_\_\_

2024PT00000423\_FRIENDS OF THE ORPHAN SIGNS (3).docx 15 of 16

**Ready to Finish?**

You've completed the required fields. Review your work, then select **FINISH**.

