LEGISTAR SUBMISSION CHECKLIST*

Before submission of a request for payment/authorization for goods, services, or construction work, the following questions must be answered to determine whether to use a purchase order or formal contract. You must check an option in all questions until the form directs you to what workflow and/or document to use.

DOES THE PRJOECT NEED A CONTRACT?

1) **Is this a request for the purchase of goods? (i.e. office supplies, vehicles, equipment, etc.)**

   Yes: _____   (Go to Question 2)

   No: X (Go to Question 4)

2) **If providing goods, does the vendor require time on any Genesee County premises for installation and/or maintenance for the goods?**

   Yes**:** _____ This project requires a contract, skip to the contracts

   section. No: _____   (Go to Question 3)

3) **Has the vendor presented a document for the county to sign?**

   Yes: _____

   - This document needs to go through Legistar and be reviewed by the proper departments before it can be signed. It is recommended that Corporate Counsel and Risk Management review prior to submission to avoid potential last step denial.

   No: _____

   - Use a **Purchase Order** You do not need to complete the remainder of this form.

4) **Is this a request for services, an IT submission, or construction work?**

   Yes: ___X__ This project requires a contract, skip to the contracts section.

   No: _____ Contact corporate counsel office prior to submitting into Legistar.

CONTRACTS

* After selecting a template, contact the Risk Manager to obtain insurance requirements <u>before</u> submitting it to Legistar. * If the vendor has provided a contract, or if you have a department specific template that you are using or have used historically, have it reviewed by risk management and corporate counsel prior to submission into Legistar. Even if the agreement was used previously, it may need changes.

1) **Is this a new contract or a renewal/extension?** _____

   a. Renewal/Extension: Use the appropriate renewal/amendment template based on the type of agreement. Include the original signed agreement and <u>all</u> prior amendments in the review process.

   b. New Contract: Go to Question 2.

2) How is the contract funded?

    a.   Budgeted or General Funds: __X__(Go to Question 3)

    b.   Grant Funded: _____(Go to Question 4)

    c.   Millage Funded: ___ (Go to Question 5)

3) What is the vendor providing?

    a.   Services: _____
- Use the **Professional Service Contract Template**

    b.   Construction/Physical Building Altercation/Remodel   X   _____
- If the contractor has not provided a proposed contract use the **Construction Contract Template** If the contractor has provided a proposed contract, contact corporate counsel prior to submitting into Legistar.

* To avoid a last step rejection, ask corporate counsel to review updated template <u>before</u> submission into Legistar. *

4) Complete the AGA Recipient Checklist for Determining Contractor vs. Subrecipient

    a.   If the service provider is a **contractor**, go back to Question 3.

    b.   If the service provider is a **subrecipient**, a department/grant specific subrecipient agreement template must be used. If the template has not been reviewed by corporate counsel within the last year, contact corporate counsel office for review of the agreement/template.

5) Is this a new contract/agreement?

Yes: _____   No: ____

    a.   If **yes** - contact corporate counsel office for assistance in selecting a template and/or creating an agreement.

    b.   If **no** – has the template/previous agreement used for this program been reviewed by corporate counsel since August 1, 2023?

        If **yes**, use the template/previous agreement.
        If **no**, contact corporate counsel regarding template/previous agreement.

6) Is a contract that is <u>not</u> a County prepared contract being submitted for review?

Yes: _____   No: __x__

    a.   If yes, submit the contract to corporate counsel office for review prior to submitting to Legistar.

* If at any point in time you have questions while completing this checklist, it is recommended that you contact the appropriate reviewing department (fiscal services, purchasing, risk management, or corporate counsel) to address your question prior to submission into Legistar.