

**State of Maryland**  
**Interagency Commission on School Construction**

**Business Management System**  
**Contract Approval Process**  
**Process User Guide**



Interagency Commission on School Construction  
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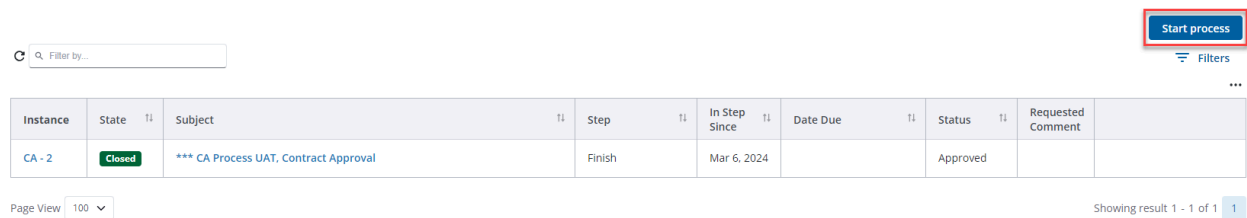
This guide is available for download at [iac.mdschoolconstruction.org](http://iac.mdschoolconstruction.org)

# Contract Approval Process

## Starting the Process

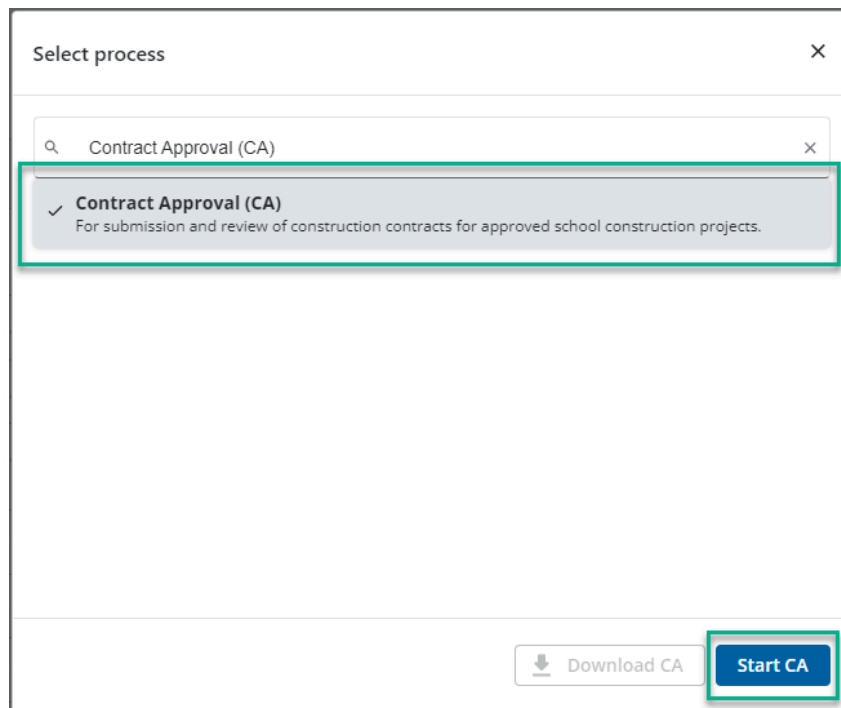
This process is used for the submission and review of construction contracts for approved school construction projects. To start this process, you must choose the correct project where the contract will reside. Once you are within that project, please use these steps to start the process.

- In the Project Menu on the left side of the page, select the “Processes” tab.
- In the “Project Processes” home screen, click on the start process tab which is situated in the top right corner of the page.



The screenshot shows a web interface for 'Project Processes'. At the top right, there is a blue button labeled 'Start process' with a red border. Below it is a search bar with the text 'Filter by...'. A table lists processes with columns: Instance, State, Subject, Step, In Step Since, Date Due, Status, and Requested Comment. The first row shows 'CA - 2' with a 'Closed' status, subject '\*\*\* CA Process UAT, Contract Approval', step 'Finish', and date 'Mar 6, 2024'. At the bottom left, there is a 'Page View' dropdown set to '100'. At the bottom right, it says 'Showing result 1 - 1 of 1'.

- Once you have clicked the start process tab, you will be presented with a list of processes that you have access to start or submit.
- Choose the process by clicking on the name.



The screenshot shows a 'Select process' dialog box. It has a search bar with the text 'Contract Approval (CA)'. Below the search bar, there is a list of processes. The first item is 'Contract Approval (CA)' with a checkmark and a description: 'For submission and review of construction contracts for approved school construction projects.' At the bottom right of the dialog box, there are two buttons: 'Download CA' and 'Start CA'. The 'Start CA' button is highlighted with a green border.

- You will then be presented with the initial step of the process.

#### Contract Approval (CA)

**Start Process** Print Check Spelling Submit Save Draft Cancel

Project: Mickey Test Project  
 Project Number: dogfm  
 Process: Contract Approval

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**Details** Documents (0) Attached Processes (0) Attached Forms (0)

Expand All | Collapse All

**Data**

Is this a CMA Contract?  Yes  No

In order to submit this Contract Award Request, you must please choose a "Commitment Type", as well as a "Company"  
 For the "Commitment Type", please choose the option that best describes the type of contact you are creating  
 For the Company, if this is a CMA contract, then please choose the company named CMA Vendor. You can do this by typing CMA in the dropdown, and then just highlight the name.  
 If this is not a CMA contract, then please choose the correct Vendor or Contractor.  
 Please disregard everything else as it only pertains to the MD IAC.  
 Thank you,

**Commitment Details**

Status: Draft	Unit Cost Options: Lump Sum Amount
Master Commitment: Please select a master commitment...	Company Number: [dropdown]
Commitment Type: Select one...	
Commitment Control: Controlled By Commitment Item	
Company: [dropdown]	
Contact: Select a contract...	

**Commitment Others**

Commitment Date: [calendar]	Notice to Proceed Date: [calendar]
Scope of work: [text area]	
Retainage Percent: 0.00	Retainage amount: <input type="checkbox"/> Support manual entry

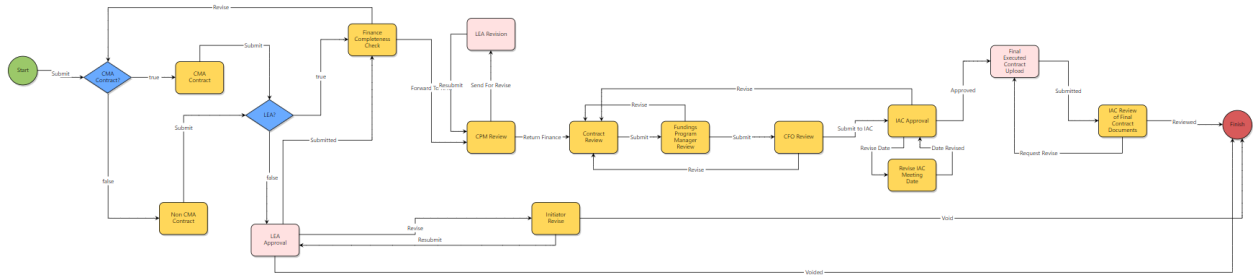
- Fill out all pertinent information, specifically whether or not the contract is a CMA contract or not.
- You will be asked to choose a "Commitment Type", as well as the contractor/vendor that this contract will be awarded to. If this is a CMA contract, please choose "CMA Vendor" within the list of companies.
- You are able to search companies by typing the first few letters of the company into the dropdown, and it will bring you automatically to that company.

**Commitment Details**

Status: Draft	Unit Cost Options: Lump Sum Amount
Master Commitment: Please select a master commitment...	Company Number: [dropdown]
Commitment Type: Select one...	
Commitment Control: Controlled By Commitment Item	
Company: cma	
Contact: CMA Vendor	

- Once finished, you can submit the process using the "Submit" button which will be in the top right corner.
- If for any reason during the filling out of the process fields, you can save your work by clicking on the save button in the top right corner. This will put the process in a "Draft" status. While in "Draft" status your work will only be available to you.
- The request will then be routed to the IAC for review and approval. Please see the description of the workflow below.

# Process Workflow



## Workflow Steps

- **Start:** Initial Submission of the contract for approval.
- **CMA Contract:** This is a decision point where the application looks to see if the contract is a CMA or not. The process will be routed by the data.
- **If this is a CMA Contract:** The process will be routed back to the process initiator so that they can fill in all of the requested information for the contract.
- **LEA Submission:** This is another decision point that checks to see if the process was submitted by the LEA Facility Planner, or by another user role.
- **Finance Completeness Check:** The IAC Finance Administrator will check the submission for completeness. If there are any questions or concerns, the IAC Administrator can then send it back to the process initiator for revisions.
- **CPM Review:** The Capital Projects Manager (CPM) will review the application. If there are any questions or revision required, the CPM will route it back to the process initiator.
- **Contract Review:** The IAC Finance Administrator will then review the contract. If approved, the administrator will route the process forward.
- **Funding Programs Manager Review:** The IAC Funding Programs Manager will review the submission, and either submit it forward, or send it back to the IAC Finance Administrator for revision.
- **CFO Review:** The IAC CFO will review the submission, and then approve it. If there are revisions required, it will be sent back to the IAC Finance Administrator for revision.
- **IAC Approval:** The IAC Administrator will then have final review, and will update the correct information into the cost portion of the project. This updated information will be visible to the process initiator.
- **Final Executed Contract:** The process initiator will be able to review all final data, and will be tasked with uploading all final contract documents.

- **IAC Review of Final Documents:** The IAC Finance Administrator will review all contract documents, and then route the process to the finish step. If the administrator has questions, they are able to route the process back to the initiator for revisions or comments.
- **If this is a Not a CMA Contract:** The process will still be routed back to the process initiator so that they can fill in all of the requested information for the contract. The data fields will be different for a CMA contract. Then the process will be routed onward as shown above.
- **If the process is not initiated by the LEA Facilities Planner:** If the process is initiated by the Capital Project Manager, then the process will be routed to the LEA Facilities Planner for approval. The Facilities Planner will be able to submit the process, return the process back to the CPM, or void the process entirely. If the Facilities Planner submits the process, it will then go to the IAC Finance Admin to do the completeness check, and route it further for approval.
- **Finance Completeness Check:** The IAC Finance Administrator, will check the submission for completeness. If there are any questions or concerns, the IAC Administrator can then send it back to the process initiator for revisions.
- **CPM Review:** The Capital Projects Manager (CPM) will review the application. If there are any questions or revision required, the CPM will route it back to the process initiator.
- **Contract Review:** The IAC Finance Administrator will then review the contract. If approved, the Administrator will route the process forward.
- **Funding Programs Manager Review:** The IAC Funding Programs Manager will review the submission, and either submit it forward, or send it back to the IAC Finance Administrator for revision.
- **CFO Review:** The IAC CFO will review the submission, and then approve it. If there are revisions required, it will be sent back to the IAC Finance Administrator for revision.
- **IAC Approval:** The IAC Administrator will then have final review, and will update the correct information into the cost portion of the project. This updated information will be visible to the process initiator.
- **Final Executed Contract:** The process initiator will be able to review all final data, and will be tasked with uploading all final contract documents.
- **IAC Review of Final Documents:** The IAC Finance Administrator will review all contract documents, and then route the process to the finish step. If the Administrator has questions, they are able to route the process back to the initiator for revisions or comments.

\*\* At any point the process initiator and all project participants will be able to review this process. This process will be available for review during the workflow steps, as well as after the completion.\*\*

\*\* At any point, all project participants will be able to print this process to either a hard paper copy, or a pdf. \*\*