

Comparison Chart – Reviewing Contracts in Paper vs. Reviewing Contracts in iCS

TASK	TODAY	IN iCS	HOW TO GET THERE
View basic information about the contract, other party, unit, etc.	Review the Contract Approval/Routing Form (CARF)	<u>Review the Jacket</u> – All of the contract properties (or metadata) appear in the contract Jacket.	Open the Document Dashboard by clicking the Open Dashboard icon, or right-clicking the contract and selecting Open Dashboard.
See who has reviewed / approved the contract thus far.	Review the signature lines on the Contract Approval/Routing Form (CARF)	<p><u>Review the Checklist</u> – Ensure that all required steps have been completed by the appropriate individual / role (If contract \$25K or more, must have Dean/Director approval, etc.)</p> <p><u>Review the Audit Trail</u> – The Audit Trail will indicate any ad hoc routing to University Counsel or Risk Management.</p> <p><u>Review the Notes</u> – See internal notes that may have been added during the development and/or review process.</p>	<p>Open the Document Dashboard and select the Checklist button.</p> <p>Open the Document Dashboard and select the Audit Trail button.</p> <p>Open the Document Dashboard and select the Notes button.</p>
Look at the contract.	Review the attached contract.	View the electronic document (Word or PDF).	Click the View link in the task window, or right-click on the contract and select View.
Approve the contract.	Apply a handwritten signature to the CARF.	Input your password and complete a checklist task (electronically signoff).	See Job Aid – Completing and Rejecting Tasks
Return the contract for additional changes / approvals, etc.	Send the contract packet back to the individual/unit who sent it to you.	Reject a checklist task and enter comments providing further instructions and/or reason for not approving the contract.	See Job Aid – Completing and Rejecting Tasks