# CONTRACT CHECKLIST 1

**Check each item after verifying the information entered in salesforce is correct. Enter "N/A" for any item that is not applicable to this contract.**

| | **Contract Information** |
|---|---|
| ☐ | Contract Name |
| ☐ | Account Name |
| ☐ | Client Type |
| ☐ | Contract Type |
| ☐ | Municipality |
| ☐ | Associated Opportunity |
| ☐ | Associated Contract on Associated Opportunity |
| ☐ | Status = Activated |
| ☐ | Current Billing Status |
| ☐ | Contract Start Date |
| ☐ | Contract End Date (blank for private rentals & sales) |
| ☐ | Prior Contract Link (entered if renewal, blank if new contract) |

| | **New Contract Checklist** |
|---|---|
| ☐ | Invoice Sending Instructions (TBD if unknown) |
| ☐ | Fair & Open Status |
| ☐ | Associated TS Contracts (1 mandatory) |

| | **Units (check box if info is correct, or if N/A)** |
|---|---|
| ☐ | Number of Rental Units (private clients, check opp or contract) |
| ☐ | Number of Sale Units (private clients, check opp or contract) |
| ☐ | HR Program Types (Owner & Rental unless you know different) |
| ☐ | Expected Annual Rehab Units (number from contract if available, can be left blank) |

| | **Recurring Flat Fee Info** |
|---|---|
| ☐ | Recurring Flat Fee 1 Total: confirm with contract PDF |
| ☐ | Recurring Flat Fee 1 Dept |
| ☐ | Recurring Flat Fee 1 Active: correctly marked active or inactive |
| ☐ | Recurring Flat Fee 2 Total: confirm with contract PDF |
| ☐ | Recurring Flat Fee 2 Dept |
| ☐ | Recurring Flat Fee 2 Active: correctly marked active or inactive |
| ☐ | If any fees marked inactive, reason entered in Flat Fee Notes |

**CONTRACT CHECKLIST 2**

| | AA Budget |
|---|---|
| ☐ | AA Setup Fee / Budget |
| ☐ | AA Planner TS Contract |
| ☐ | AA Planner Hourly NTE |

| | Grants Budget |
|---|---|
| ☐ | Grants TS Contract |
| ☐ | Grants Hourly NTE |

| | Checklist: Contract PDF |
|---|---|
| ☐ | Test button at top, verifying correct document is attached |
| ☐ | Contract billing terms are shown in PDF (attach and reupload if needed) |

| | Checklist: Billing Terms |
|---|---|
| ☐ | Fee description and NTE of all line items match contract PDF |

| | Checklist: Contract Spreadsheet |
|---|---|
| ☐ | Check the notes field contains the # of units, or where NTE comes from |
| ☐ | Color-code columns from different departments/functions |
| ☐ | Column headers match contract terms |
| ☐ | Verify Contract Name and Dates |
| ☐ | Verify amount at top right = NTE, or is blank if no NTE |
| ☐ | Verify not-to-exceeds in each line item |
| ☐ | Verify that balance tracking at bottom is working |

| | Checklist: Timeslips Setup |
|---|---|
| ☐ | Timeslips: Name is entered correctly in Timeslips and matches TS contract record in SF |
| ☐ | Timeslips: Verify “In reference to” line is entered correctly, with PO # of Reso if applicable |
| ☐ | Timeslips: Verify rates are correct |
| ☐ | Associated TS Contract(s): verify correct client type |
| ☐ | Associated TS Contract(s): Active is checked and Productivity is checked |
| ☐ | Associated TS Contract(s): correct service is selected |
| ☐ | Associated TS Contract(s): related municipality is entered, or “No Muni Needed” is selected |
| ☐ | Associated TS Contract(s): for Private Sale contracts, check “Bill Sale Eligibilities” as true |

| | Checklist: Invoice Workbook |
|---|---|
| ☐ | Confirm it is in the boilerplate and that any information in the workbook is updated. |

| | For Private Rental or Sale Contracts |
|---|---|
| ☐ | Check “Related Development” field on the Associated Opportunity. If a development is listed, open the property. Make sure the “Timeslips Contract” matches the contract. |

**Once all of the above is verified, enter your name in the “Contract Verified By” field and the date to “Contract Verified Date” field.**