

QUICK REFERENCE GUIDE

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Approve a Contract Document Electronically

Before you submit a contract document for signatures, you must route it for approvals. You can route the contract documents you created in SWIFT for electronic approvals. SWIFT uses a predefined workflow to route contract documents for approval. SWIFT routes them sequentially. The first approver must approve it before SWIFT routes it to the next approver. Agencies can enable internal users to sign documents digitally at the same time they approve the document. Agencies can configure SWIFT to capture internal signatures before, during or after approvals.

Approvers can approve or deny the contract document. If an approver denies the contract document, SWIFT notifies the contract coordinator and cancels the approval routing.

Approvers:

Agency leadership works with its SWIFT security coordinator to set up the approval paths for approvers. The security coordinator sets up approvers and approval roles for contracts based on agency policy and practice. Typically, agency staff are set up for these approvers.

- **Contract Administrator:** Staff person identified on the **Contract Entry** page. It may or may not be the person sending the contract document for approval. If it is the same person, workflow is set to self-approve and the **Approve** or **Deny** buttons are immediately available on the **Document Management** page. If it is not the same person, SWIFT will notify the contract administrator via email and/or Worklist.
- **Contract Manager:** Staff person identified on the **Create Document** page. It is a required field. This could also be the same person as the contract administrator.
- **Additional Approver:** Staff person also identified on the **Create Document** page. This field is optional. If you did not identify an additional approver, SWIFT skips this approval step.
- **Contract Coordinator:** Staff person responsible for reviewing Professional/Technical contract documents before you send them for signature. There might be more than one contract coordinator at an agency. If so, all users with the role will receive notification and a link in their worklist.

Roles for Approvers:

Your agency leadership needs to contact your security coordinator to add this role for contract coordinator and approvers.

- Document Approver: M_FS_SC_CONTRACTUAL_APPRVER

This guide assists contract document approvers to be able to complete their tasks.

Steps to complete

- Step 1: Use the Approvals tile to find contract documents for review and approval
- Step 2: Review and approve or deny the contract document

