



AgreeDB Assigned No:	
AgendaQuick Item No.	
Finance Staff Initial:	
Rec'd Date/Staff Initial	

AGREEMENTS TRANSMITTAL FORM

Contract Owner is responsible for filling out its form to its entirety with all relevant information. This form is for every agreement and every change to an agreement.

I. Basic Agreement Information

Agreement Title			
Fiscal Year		Calendar Year	
TOM Generating Department	Staff Name	Department No.	
Vendor/Outside Agency Information	MUNIS Vendor #	Name of Organization	
Vendor/Outside Agency Contact Information	Name of Contact	Phone Number	Email
Agreement Start Date		Expiration of Agreement	
Munis Project Name		Munis Project Number	
Vendor/Outside Agency Project No.			

Type of Document	Extension of Agreement
<input type="checkbox"/> Cooperative (Linking) Agreement Linking #: _____ <input type="checkbox"/> Marana Original Agreement <input type="checkbox"/> Amendment <input type="checkbox"/> Addendum <input type="checkbox"/> Task Order <input type="checkbox"/> Change Order	<input type="checkbox"/> Extension of Agreement No. ____ of ____
_____ AgreeDB # (when parent agreement is in AgreeDB)	

Type of Agreement:			
<input type="checkbox"/> 005 General Services	<input type="checkbox"/> 010 Professional/Tech	<input type="checkbox"/> 015 Supplies/Equipment	<input type="checkbox"/> 020 Construction / C.I.P.
<input type="checkbox"/> 025 Government Related	<input type="checkbox"/> 030 Lease Agreement	<input type="checkbox"/> 035 Property Related	<input type="checkbox"/> 040 Development Related
<input type="checkbox"/> 045 Utilities/Water	<input type="checkbox"/> 050 Other		

II. AgreeDB Task and Notification Section

Please attach brief and additional doc if there is not enough space within the note section or there are multiples of the same task type.

Quality Control Assurance Section

General Compliance	Instruction/Notes	Notification Preference
<input type="checkbox"/> Debt Issuance -Due Date _____ <input type="checkbox"/> Report -Due Date _____ <input type="checkbox"/> Other (describe in note section) -Due Date _____		<input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Agreement Payment Terms	Instruction/Notes	Notification Preference
<input type="checkbox"/> Payment Terms -No. of Payment Terms _____ -Amt. Due _____ -Due Date _____		<input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice



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Notice to Proceed	Instruction/Notes	Notification Preference
<input type="checkbox"/> Notice to Proceed -Due Date: _____		<input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Bond Updates	Instruction/Notes	Notification Preference
<input type="checkbox"/> Updates to Bond -Bond Expiration Date: _____		<input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Certificate of Insurance	Instructions/Notes	Notification Preference
<input type="checkbox"/> Certification of Insurance -Due Date: _____ -No. of Insurance Coverages: _____ -Insurance Co Info.		<input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice
Agreement Renewal	Instruction/Notes	Notification Preference
<input type="checkbox"/> Agreement Renewal -Deadline: _____		<input type="checkbox"/> 30 Day Notice <input type="checkbox"/> 60 Day Notice <input type="checkbox"/> 90 Day Notice <input type="checkbox"/> 120 Day Notice

III. Laserfiche Details/Other Details

Laserfiche Location/Folder Path	
Retention /Destruction Date	Special Instruction Notes
<input type="checkbox"/> Other (Refer to the Retention Schedules) -Retention Date: _____ -Destruction date: _____	
Document Link	Special Instruction Notes
<input type="checkbox"/> Link to Authorizing Resolution -Resolution No.	
Location of Record	Special Instruction Notes
Physical Location of Document <input type="checkbox"/> Town Clerk File <input type="checkbox"/> Finance File <input type="checkbox"/> Department File	
Special Note:	
<input type="checkbox"/> 005 General Services	<input type="checkbox"/> no <input type="checkbox"/> yes



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IV. Finance/Town Clerks

Signature of Agreement	
Execution of Agreement by (date)	
Date Entered into AgreeDB (w/i 5 days of signature execution)	

V. Document References

Department and Department # Chart:

Department Naming Convention	
Department #	Department Description
0	NON-DEPARTMENTAL
1100	MAYOR COUNCIL
1200	TOWN MANAGER
1300	TOWN CLERK
1400	HUMAN RESOURCES
1500	FINANCE
1600	LEGAL
1700	TECHNOLOGY
1800	ECONOMIC & TOURISM DEVELOPMENT
2100	RECORDS CENTER
2200	BUILDING SAFETY
2300	PLANNING
2400	ENGINEERING
3100	POLICE
3200	MAGISTRATE COURT
4100	PUBLIC WORKS
4300	CIP ENGINEERING DIVISION
5100	PARK & RECREATION
6100	COMMUNITY NEIGHBORHOOD SERVICES
9000	WATER DEPARTMENT
9100	WASTE WATER
9200	AIRPORT OPERATIONS

Agreement Type Chart:

Only one Agreement Type can be selected. Please consult with Town Clerk's Office if you are uncertain about the agreement type and/or need clarification. Consulting with Town Clerk's Office in these incidents will help in Town-wide consistency, reporting, and search ability within AgreeDB.

Agreement Types and Examples		
No.	Type	Examples
005	General Services	<input type="checkbox"/> Sanitation <input type="checkbox"/> Facilities Maintenance <input type="checkbox"/> Pest Control <input type="checkbox"/> Landscaping <input type="checkbox"/> Street Sweeping <input type="checkbox"/> Contractor Related Temporary Services <input type="checkbox"/> Tax Related <input type="checkbox"/> Shredding Services
010	Professional/Technical Services	<input type="checkbox"/> Appraisal Services <input type="checkbox"/> Lobbying Services <input type="checkbox"/> Legal Counsel <input type="checkbox"/> Engineering As Needed <input type="checkbox"/> Audit
015	Supplies and Equipment	<input type="checkbox"/> Acquisition <input type="checkbox"/> Pavement Marking Materials
020	Construction/C.I.P	<input type="checkbox"/> Construction <input type="checkbox"/> Engineering and Design <input type="checkbox"/> Development Agreement



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025	Government Related	<input type="checkbox"/> Intergovernmental -Facility Use Agreements -Services -Public Safety -Floodplain -Land Use <input type="checkbox"/> Grants <input type="checkbox"/> Transit <input type="checkbox"/> Memorandum of Understanding (MOU) <input type="checkbox"/> Mutual Aid
030	Leases	<input type="checkbox"/> Agricultural Lease <input type="checkbox"/> Equipment Lease <input type="checkbox"/> Land Lease <input type="checkbox"/> License Agreements <input type="checkbox"/> Residential <input type="checkbox"/> Right-of-Way
035	Property Related	<input type="checkbox"/> Annexation <input type="checkbox"/> State Land <input type="checkbox"/> Monuments <input type="checkbox"/> Right-of-Way <input type="checkbox"/> Land Purchases <input type="checkbox"/> Environmental <input type="checkbox"/> Habitat Conservation/Environmental <input type="checkbox"/> Licenses <input type="checkbox"/> Land Exchange <input type="checkbox"/> Acquisition <input type="checkbox"/> Public Improvement Participation <input type="checkbox"/> Drainage Channel <input type="checkbox"/> Settlement
040	Development Related	<input type="checkbox"/> Development Assurances <input type="checkbox"/> Release of Assurances <input type="checkbox"/> Guaranty/ Warranty
045	Utilities/Water Related	<input type="checkbox"/> Service Areas <input type="checkbox"/> Water Quality Monitoring <input type="checkbox"/> Conservation <input type="checkbox"/> Facilities/Construction <input type="checkbox"/> Infrastructure Participation <input type="checkbox"/> Joint Planning <input type="checkbox"/> Water Right Purchase
050	Other	<input type="checkbox"/> Local Organization Funding -Chamber -Conservancy <input type="checkbox"/> Tower Leases <input type="checkbox"/> Franchise Agreements <input type="checkbox"/> Confidentiality <input type="checkbox"/> Employment Contracts <input type="checkbox"/> Employer Assisted Housing <input type="checkbox"/> Parks & Recreation Related

NOTE: PLEASE DO NOT SAVE YOUR WORK TO THIS FORM! CLICK "SAVE AS" TO YOUR DRIVE ONCE IT IS FULLY COMPLETE. SAVE THE DOCUMENT FILE TITLE AS THE GENERATING DEPARTMENT/AGREEMENT TITLE. NOTIFY THE TOWN CLERK OFFICE AND FINANCE DEPARTMENT SO THAT IT WILL BE RECORDED. THE METADATA PROVIDED ON THIS FORM WILL SHOW IN THE SYSTEM BY WHICH YOU PROVIDE. FOR MORE INFORMATION SEE AGREEMENT TRANSMITTAL PROCEDURE DOCUMENT.