

INSTRUCTIONS FOR USING SERVICENOW TO SUBMIT A CONTRACT REVIEW REQUEST TO OCA

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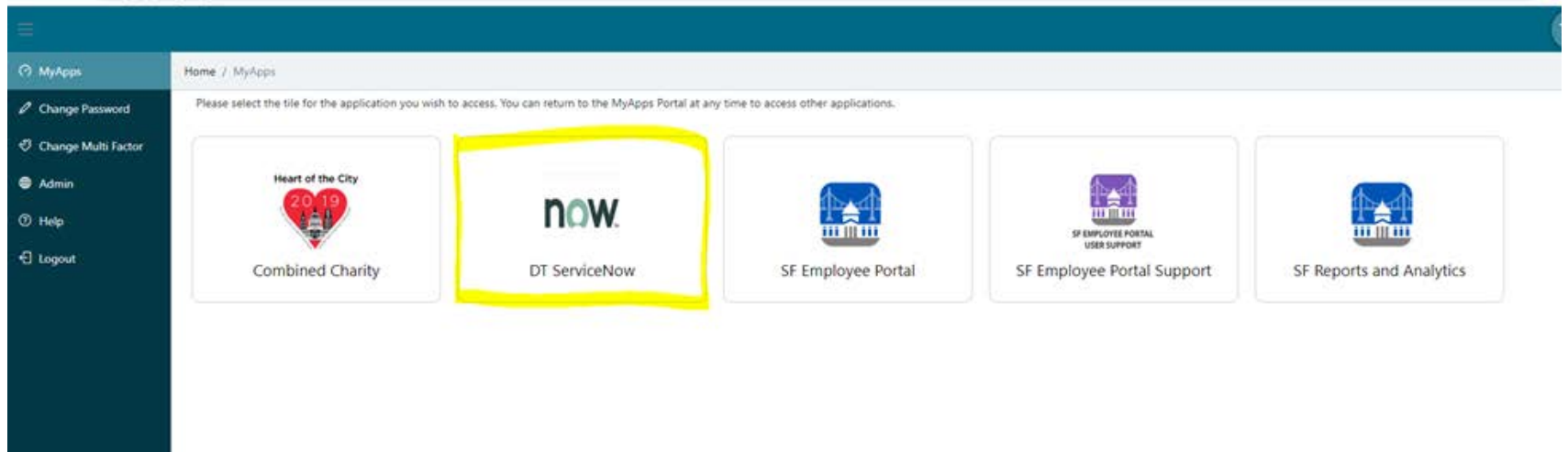
Tip:

- **Using PDF, Use Mouse to Click on Each Topic Above**
- **Using Word, Hold CTRL Key and Use Mouse to Click on Each Topic Above**

PART I: HOW TO SUBMIT A CONTRACT REVIEW REQUEST TO OCA

Step 1: Go to: <https://myapps.sfgov.org/dashboard>

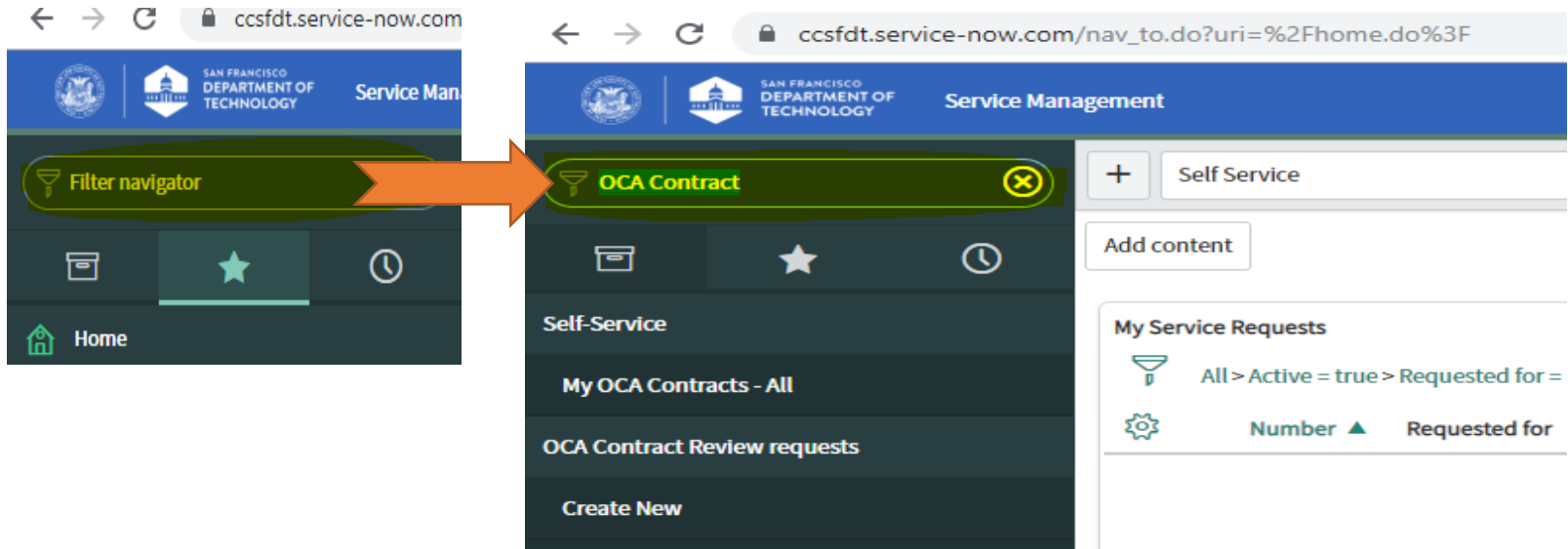
Step 2: Click on ServiceNow.



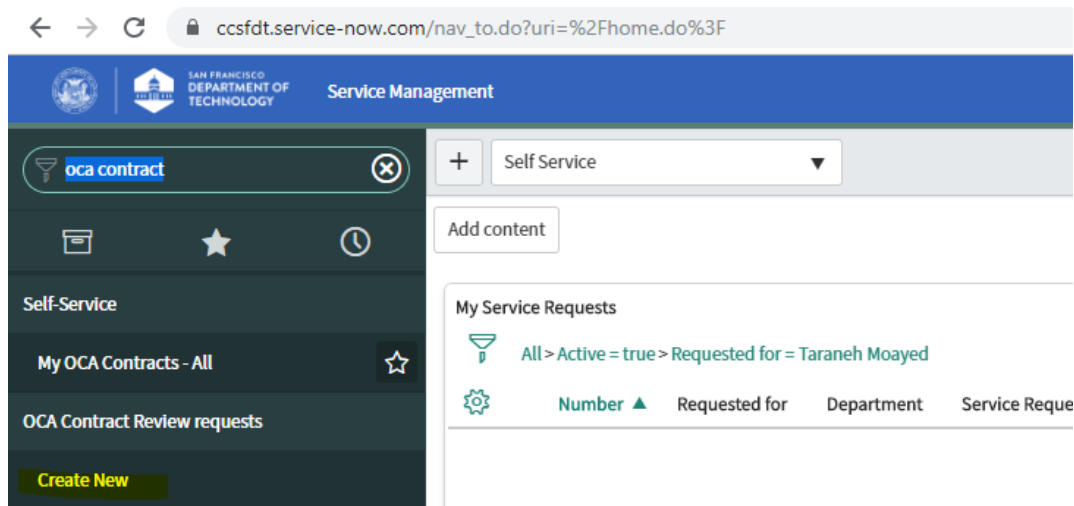
Username: DSW Number

Password: Same as the one used for PeopleSoft

Step 3: In the “Filter Navigator” field, type in “OCA Contract”.



Step 4: Click on “Create New”



Step 5: (A) Enter ALL fields & (B) Upload correct OCA Checklist.

**** Do not upload anything but the checklist.**

Please complete this form and attach appropriate OCA contracting checklist(s). **Other than the contracting checklist, please do not attach any other document to this request!**
You will be notified once the OCA purchaser has been assigned to your contract.

OCA Contracting Checklists:

- CL-100 Services Contract Checklist (CL-100 (9-19).docx)
- CL-200 Commodities and Software Contracts Checklist (CL-200 (9-19).docx)
- CL-300 Equipment Lease Checklist (CL-300 (9-19).docx)
- CL-400 Assignment and Assumption and Novation Checklist (CL-400 (9-19).docx)
- OMP-100 Contract Blanket Requests (OMP-100 Checklist.docx)

Number: OCACPT0001006
State: Draft
Contract docs uploaded in PS?: -- None --
PS Contract ID: [Redacted]
Contract Type: -- None --
Signature type: -- None --
Contract Administrator: Taraneh Moayed
Department: ADM
Contact Phone: +14155546212
Watch list: [Lock] [Share]

Supplier and Contract details | Activities

Contract Start Date: [Redacted] [Calendar]
Contract End Date: [Redacted] [Calendar]
Contract NTE Amount: \$ [Redacted] 0.00
Supplier ID: [Redacted]
Supplier Name: [Redacted]

Step 6: On the top left corner of your request, you can select “Update” to save your entries or “Submit for Review” to route request to OCA.

TM Taraneh Moayed [Dropdown] [Messages] [Help] [Settings]

[Pencil] [Checkmark] [More] **Update** **Submit For Review** [Up] [Down]

Complete

PART II: OCA CONTRACT REVIEW

Step 1: OCA ADMIN ROLE

- **OCA Admin is notified of your request.**
- **OCA Admin will:**
 - (A) Ensure you completed and uploaded the correct OCA Checklist;
 - (B) If using wet signature, ensure your contracts are at OCA; and
 - (C) Assign your request to an OCA Buyer.

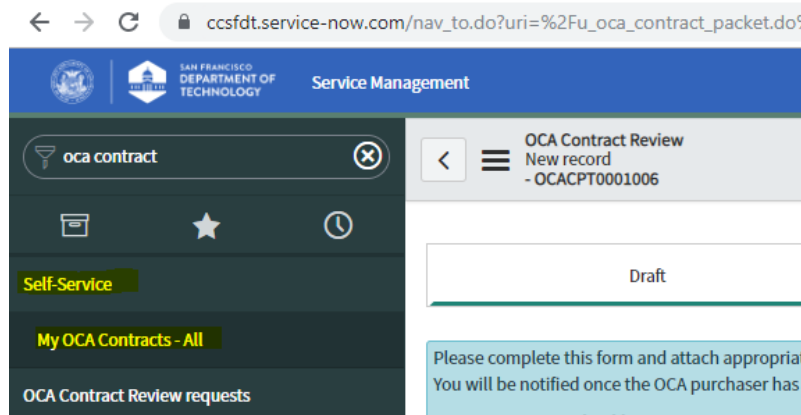
**** If your request is missing the checklist and/or your contract is not at OCA, it will be rejected and you must resubmit using a new request.**

Step 2: OCA BUYER ROLE

- **Once your request has been assigned to a buyer, you will be notified by email.**
- **OCA Buyer will:**
 - (A) Review your entries in PeopleSoft and your OCA Checklist.
 - (B) Review the documents uploaded to PeopleSoft as required by your OCA Checklist.
 - (C) Reply in ServiceNow with instructions to make corrections and/or upload missing documentation. You will be notified via email.
 - (D) Approve/Reject Request. You will be notified via email.

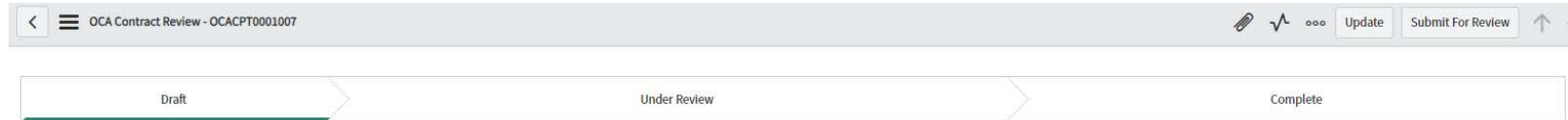
PART III: ADDITIONAL FEATURES

1) Find your Existing Requests:

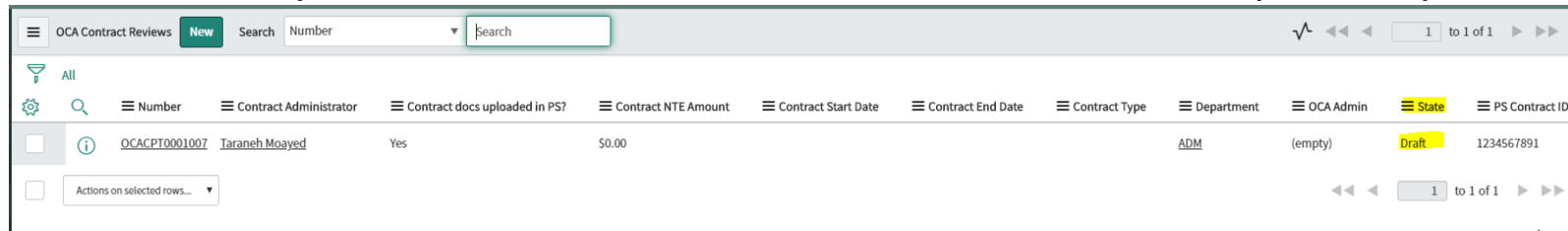


2) Check status of your Request:

Option 1: In your request, a **green line** will appear under its “State”.



Option 2: Go to “MyOCA Contracts – All” to view the State of all your requests:



States Defined:

- **Draft:** Not Submitted to OCA
- **Under Review:** At OCA
- **Complete:** Approved or Rejected