

County of Santa Barbara Auditor-Controller Document Review Intake Form

Department: <i>County Counsel - 013</i>	A/C Intake Staff: <i>Eloisa Madrigal</i>
Contact Name & Ext: <i>Susan McKenzie 2957</i>	Date/Time Received by A/C: <i>5/26/17, 11:47am</i>
Type of Document: <i>Agreement</i>	Docket Date (deadline): <i>June 8, 2017</i>
Document Name: <i>Agreement to Provide Management & Legal Services to Beach Erosion Authority for Clean Oceans & Nourishment</i>	
Noteworthy Accounting Event: <i>- none -</i>	Budget Revision Included <input type="checkbox"/>
Brief Summary: <i>(Please include financial terms of contract)</i> <i>This Agreement between the County of Santa Barbara and BEACON will allow the Office of County Counsel to continue providing legal services to BEACON.</i>	

Item	Description	Dept Review	A/C Review
A.	Allow 3 business days for review – plan ahead <ul style="list-style-type: none"> If the document packet is not complete upon receipt, the review time will be longer 		
B.	Department Financial/Accounting Review is required <ul style="list-style-type: none"> The Departmental CFO/Business Manager must initial that a financial/accounting review has been completed as outlined in the <i>Departmental Procedures for Complete Board Contracts</i>. Note: All financial/accounting related questions will be directed to the CFO	<i>Sum</i>	INITIAL HERE ✓
C.	Include all documents/attachments <ul style="list-style-type: none"> Board letter and all attachments referenced in the board letter ✓ Other documents requiring review/signature should include all referenced attachments ✓ 	<i>Sum</i>	✓
D.	Board expenditure contracts must include <ul style="list-style-type: none"> A completed <i>Board Contract Summary Form</i> ✓ Board Letter ✓ Board Contract ✓ Statement of Work (Exhibit A) ✗ Payment Arrangements (Exhibit B) ✗ Indemnification and Insurance (Exhibit C) ✗ HIPAA Business Associate Agreement (Exhibit D) ✗ 	<i>n/a</i>	✓
E.	The signature page must include (prior to A/C review): <ul style="list-style-type: none"> Department Head signature ✓ County Counsel signature ✓ Risk Management signature ✓ Contractor signature ✓ 	<i>Sum</i>	✓
F.	After Board Approval- Email Pam Avila (pavila@co.santa-barbara.ca.us) in FACS the following: <ul style="list-style-type: none"> Board Letter Fully executed contract/amendment Minute Order 		