

Quick Start Guide

Please note that **ALL information in the instrument, attachments, and tabs must match the information provided in the vendor's E-Verify exactly.**

1. Gather the necessary information to build your instrument.
2. Determine the type of instrument you are building and which clauses you will need.
3. Select your template from the ACES library.
4. Draft your instrument using the default font (Arial 12) and apply "draft" watermark to your instrument.
5. Send draft instrument and marketing packet to vendor.
6. Receive and review instrument draft and marketing packet from the vendor.
7. Remove the "draft" watermark from the instrument and save.
8. Verify the DUNS and save as a pdf.
9. Build your instrument in ACES. Check the Pre-processing tab to make sure the instrument you have built is consistent with the instrument you intended to build.
10. Complete all of the required tabs in ACES. All information entered into the tabs should match the information on the E-Verify **exactly**.
11. Attach your instrument and supporting documentation.
 - a. All documents (E-Verify, indirect cost agreement, budget, DUNS pdf, etc.) required for the Finance Review & E-sign must be attached at this time.
 - b. All other documents (FFATA, Certificate of Compliance, and Disclosure Statement) may be attached later if you do not have them. You will need to attach a placeholder file in ACES in the appropriate location. Name it blank.pdf.
12. Once your instrument has been through Legal Review & E-sign, send your instrument to the vendor to be signed.
13. Upon receipt of the executed instrument and all supporting documents from the vendor, scan and attach the supporting documents in the appropriate locations in ACES. Remove any placeholder files (blank.pdf).
14. Obtain your Bureau Director's signature on the instrument as well as on the Bureau Director's Checklist.

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15. Print the Summary Data Sheet and Cover Sheet from ACES. (This must be done after the instrument has went through Legal Review & E-sign). Sign and date the Cover Sheet for Final Processing by Legal.
16. Submit the Bureau Director Checklist, Cover Sheet for Final Processing by Legal, Summary Data Sheet, Cover Sheet, instrument and all attachments in hard copy form to Legal.
17. Upon receipt of email that your instrument is ready to Mark Complete, click the appropriate button in ACES, and retrieve your hard copy from legal.