CivicClerk Instructions

1. Login to the CivicClerk portal at https://lavergnetn.v8.civicclerk.com/. If you don't have a login, please contact Glenn Green so he can set one up for you.

2. Select the Meetings tab on the left sidebar. On the right side, find and click on the meeting agenda where you need to add your item.

3. To add an item, click on the green Create button at the top of the screen. Choose Item.

4. Select the Section of the agenda where the item needs to go. Typically, it would be Consent Agenda or New Business. If you're not sure, contact Bruce.

5. Enter the Agenda Item Name as follows:
   - If Consent Agenda and it's a purchase, item should begin with "(Purchase type) - (Item name)". When I say Purchase type, I mean Bid, State Contract Purchase, Sole Source Purchase, etc.
   - If Consent Agenda and it's a proposal, contract, agreement, etc., item should begin with "Approve (type - proposal, contract, etc.) from (company name) for (project or equipment)"
   - If New Business, it's probably an ordinance, resolution or something that is not simple in nature. Send Bruce those items and we will figure out how to title it and determine the process needed for approval.

6. Select Item Category - most items should be consent agenda. If it's under New Business, it could be a motion, ordinance or resolution.

7. Select your department.

8. Click the green "Create Item" button at the bottom of the window.

9. A page will open with the Item Fields being shown for the Summary Sheet. Scroll down and fill out the Presented By, Summary, Background Information, Financial Summary and Staff Recommendation Sections. More info below on what is required for each section.
   - Presented by is You! This is your item.
   - Summary - this is a short one or two sentence summary on the basics of what this item is. Don't go into a lot of detail in this section.
   - Background Information - this is where the nuts and bolts of the item are explained. What it is, why it's needed, etc. Basically any information (other than financial) that is needed to explain to the board what the item is.
   - Financial Summary - this is where you explain the cost, how it's being paid for and if it is a budgeted item. Don't just say the price. Explain it in a sentence. Example: The cost of the widgets is $40,000.00. This is a budget item and will be paid out of the XX Department budget.
   - Staff Recommendation - Standard line here should almost always be "Staff recommends approval". There may be times when other conditions need to be added or maybe a deferral is needed.

10. Once finished with the fields, click on Save Item.

11. On the top left of the screen, you will see a drop down box below the title of your item. Click on it and choose Item Files. This is where you upload your supporting documentation. In the Attachments section, choose “Add Attachments” on the right side of the page. Drag the supporting documentation from File Explorer or click in the box to go find the document. Please note that this document should be a PDF if possible. When finished adding documents, click on Add Attachment.

12. When finished, you can click on the drop down box that says Actions and choose Item Preview. A box will pop up that shows you what the item will look like in the packet. Make sure it looks right to you.

13. When finished, click on the green “Start Approvals” box on the top right and it will send it to me for review and changes - if needed.

If you need help at any time, please feel free to contact Bruce for help. It’s going to be confusing for a little while until we get used to the system. Once we get used to it, it will make all of our lives easier.