sCONTRACT - Phase Owner Adding Amendments, SOW, Orders, BAA, DPA, etc.

sContract
Phase Owner

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symplr Contract

symplr Contract is a user-friendly application that supports contract management. symplr Contract provides increased visibility into contractual obligations, mitigates risk of non-compliance and identifies additional opportunities for cost savings by controlling the contracting process.

Logging In

To log in to symplr Contract, you need an email address and password. Open your browser, navigate to the tenant using the appropriate URL. You'll only need to do this once.

1. The **Login** page displays.
2. Type the **Email** and **Password**.
3. Click the **Login** button.
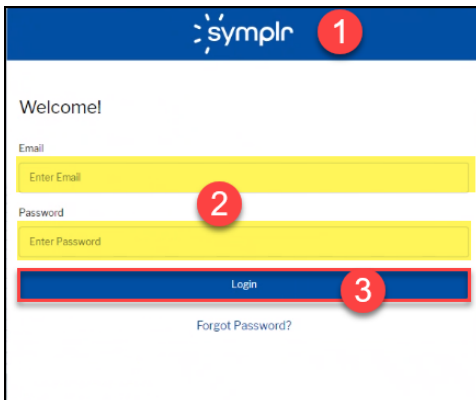
a. The **My Worklist** page displays. It houses the contract library.
b. The **symplr Contract** logo at the top, left functions as a home button.
c. The **bell icon** lights up red with the number of new notifications.
d. Any pending actions will be displayed in yellow.
e. You can perform a text search within the contract library.
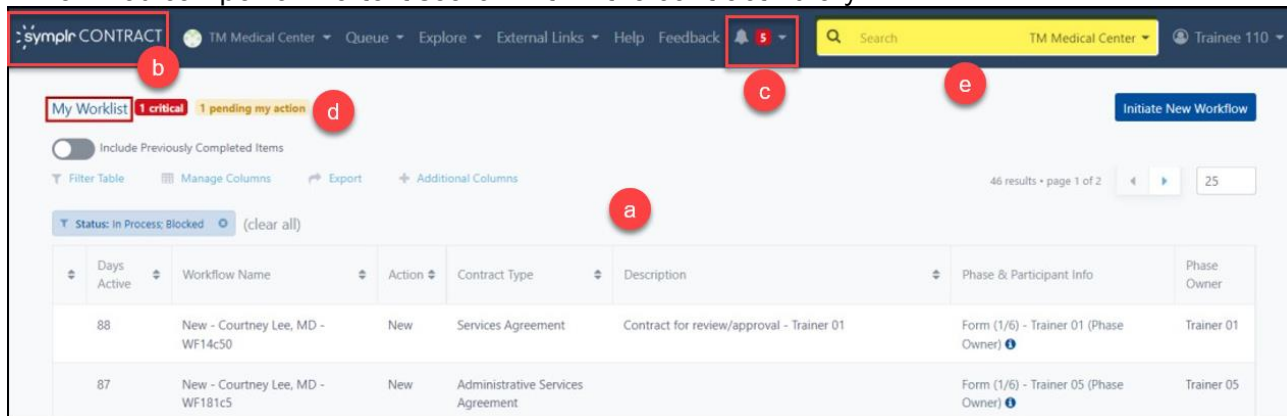
sContracts
Amendment, Addendum Adding Statement of Work (SOW), Order, BAA, NDA, etc.
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Adding an Amendment, Addendum, Statement of Work (SOW), Order, BAA, NDA, etc.

BAA and **DPA** can be added through this same process, if it wasn't completed originally when the master was processed. In this workflow, you **won't** add **Master Agreements**. To add an amendment, addendum or SOW:

1. Click **Initiate New Workflow**.
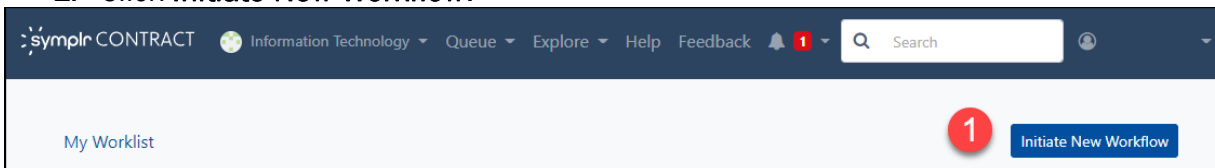
2. You'll need to fill out four required fields (in red). **Note:** Don't change preselected options.
   a. **CONTRACT LOCATION:**
      o When selecting the location, you'll choose the:
      (O) Organization
      (E) Entity
      (S) Site: Always select **Systemwide** unless the agreement is for the RI (HMRI) only.
      (D) Department
   b. **CONTRACT TYPE:** Statement of Work (SOW), Addendum, BAA, NDA, etc.
   c. **PRIMARY OTHER PARTY:** Vendor
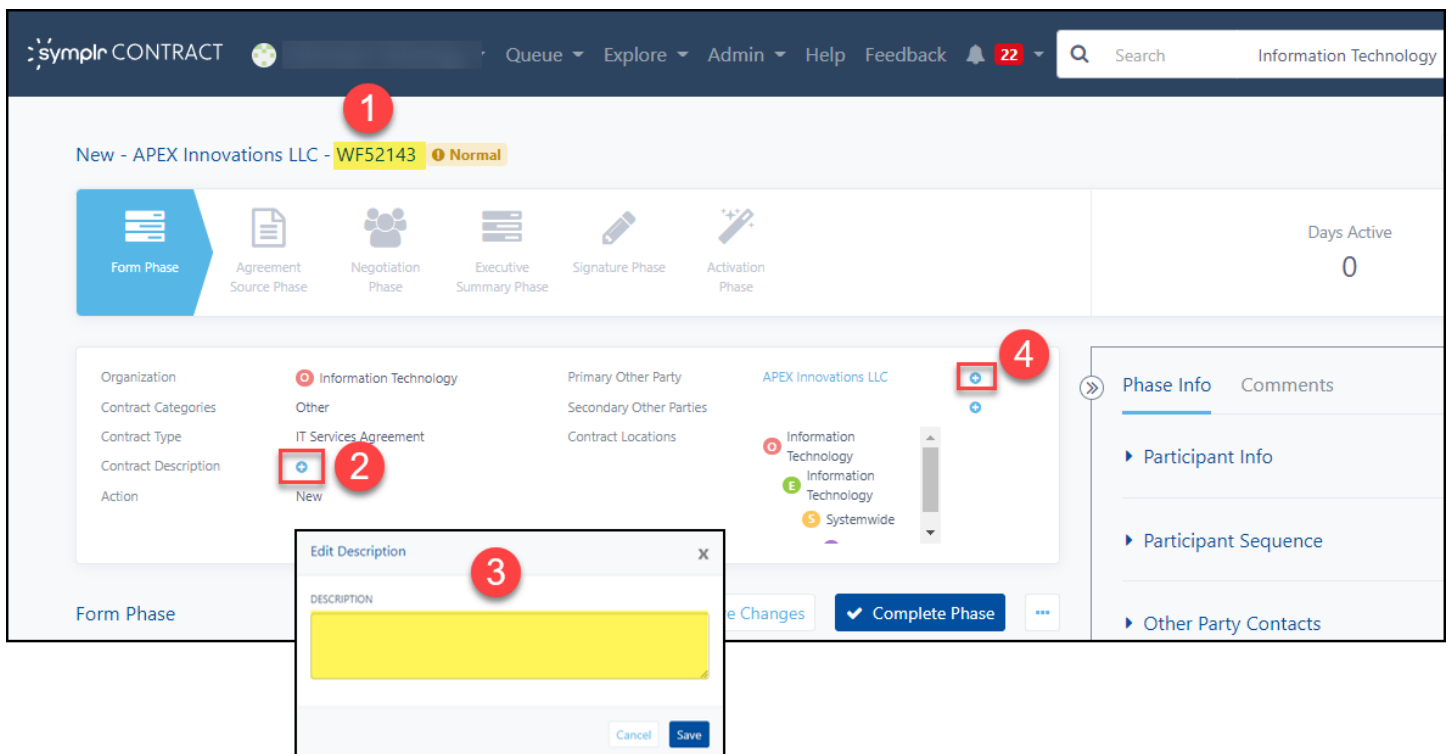   d. **WORKFLOW TEMPLATE: IT – Other** (not for Master agreements or Amendments)
3. Once all fields have been filled out, click **Initiate Workflow**.

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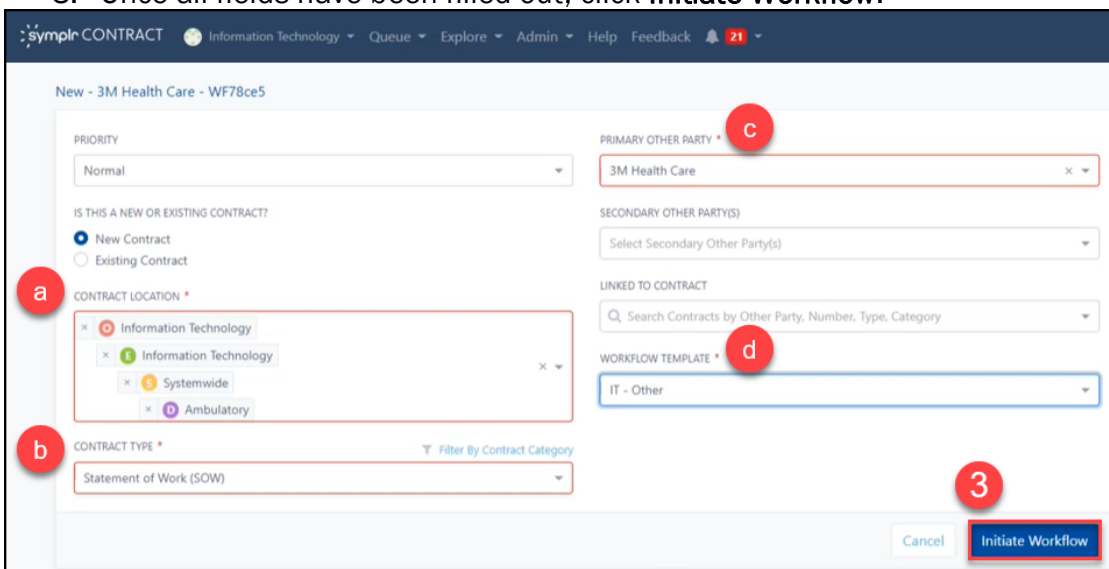
Form Phase

In the **Form Phase**, you'll complete questions pertaining to the type of contract you're requesting, or simply complete the contract cover sheet. You can also leave comments and upload supporting documents under attachments. Agreements should be uploaded in the **Agreement Source Phase,** not the **Form Phase**.

1. A unique workflow ID is assigned to the workflow as highlighted below.
2. Click the **blue plus sign** [+] next to **Contract Description** (description will display in **My Worklist**).
3. Enter naming conventions as shown below, in the **Description** box.
    a. Naming convention example: "Vendor name service description": Medasource SOW - Consulting Services.
4. The "vendor" or **Primary Other Party** can be changed by selecting the [+] next to **Primary Other Party**.

Completing the Form

1. Click **Start Phase**.
2. Click on the toggle to allow for **Single-page** view. Scroll down to complete.
   - o   A **red asterisk** indicates a required field.
3. Answer all required questions. Answers may trigger additional required questions to be answered.
   - a. You must click **Save Changes**. Answers won't autosave while in single-page view.
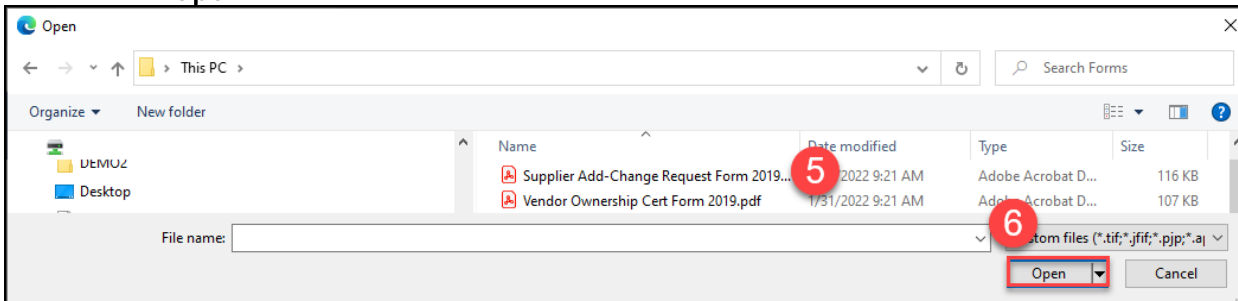

4. You may be prompted to add a specific document. Click **ADD ATTACHMENT**.

5. Select the appropriate document.
6. Click **Open**.

7. In the **DOCUMENT NAME** field, enter a name that helps identify what the agreement is for.
   - The document name will be pulled into this field.
     - Naming convention should be: **Vendor – Supporting Document Name (descriptor)**.
       - Example: Abiomed – Supplier Add-Change Request Form
       - Example: Healthier Alternatives – ACH Payment Form
8. Select the appropriate **DOCUMENT CATEGORY** from the dropdown and click **Save**.
9. Click **Save**.

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10. Click **Complete Phase**.

Attachments

As you upload supporting documents, if needed, you'll be able to see your uploaded documents in the following places:

1. In the form after uploading.
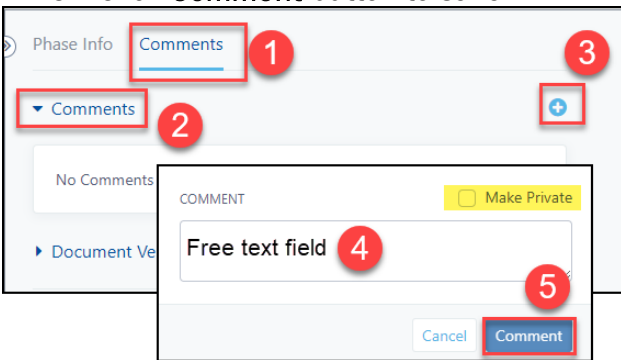


2. Under **Phase Info>Attachments**.

Comments

In addition to populating fields, you can leave comments.

1. In the workflow, select the **Comments** tab.
2. Click **Comments**.
3. Click the **blue plus icon** to the right of the **Comments** section header.
4. In the comment pop-up window, type a message.
   o You have the option to make the comment private.
5. Click **Comment** button to save.

6. The comment displays in the **Comments** tab with the total number of replies.
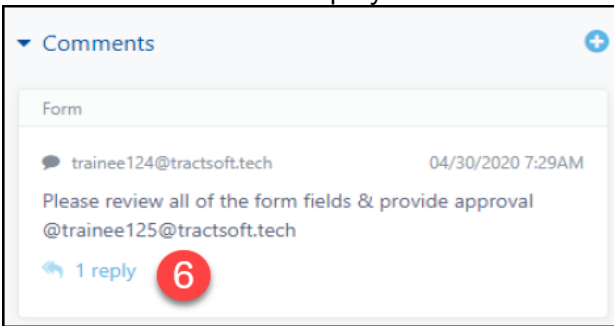
7. To view the comment thread, click the **reply** hyperlink.
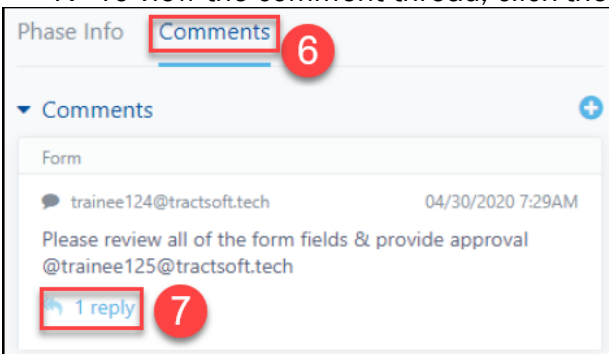
Agreement Source Phase

In this phase, you'll upload a **Statement of Work (SOW)**, **Addendum**, **BAA**, **NDA**, **etc.**

1. Click **Upload Source File**.

2. Select the appropriate **Agreement**.
3. Click **Open**.

4. In the **DOCUMENT NAME** field, enter a name that helps identify what the agreement is for.
   - The document name will be pulled into this field.
   - Naming convention should be: Vendor Agreement Name Type of agreement.
     o Insight Global BAA
     o Insight Global SOW-Consultant Name (10312022-12312022)
     o Insight Global Quote – 10312022-12312022
5. Select the appropriate **Document Category** from the dropdown.
6. Click **Save**.

7. Click **Start Phase**.

8. Click **Complete Phase**.