

sCONTRACT Phase Owner



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

You'll be able to log in to symplr Contract through single sign on. Otherwise, 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.

1

Welcome!

Email

Enter Email

2

Password

Enter Password

3

Login

Forgot Password?

- a. The **My Worklist** page displays. It houses the contract library.
- b. The **symplr Contract** logo at the top, left functions as the 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.

symplr CONTRACT

TM Medical Center

Queue

Explore

External Links

Help

Feedback

5

Search

TM Medical Center

Trainee 110

My Worklist 1 critical 1 pending my action

Initiate New Workflow

Include Previously Completed Items

Filter Table

Manage Columns

Export

Additional Columns

46 results • page 1 of 2

25

Status: In Process: Blocked (clear all)

Days Active	Workflow Name	Action	Contract Type	Description	Phase & Participant Info	Phase Owner
88	New - Courtney Lee, MD - WF14c50	New	Services Agreement	Contract for review/approval - Trainer 01	Form (1/6) - Trainer 01 (Phase Owner)	Trainer 01
87	New - Courtney Lee, MD - WF181c5	New	Administrative Services Agreement		Form (1/6) - Trainer 05 (Phase Owner)	Trainer 05



Phase Owner

As a **Phase Owner** you'll have access to **Initiate Workflow**, complete the **Form Phase** and complete the **Agreement Source Phase**.

Phase Tracker

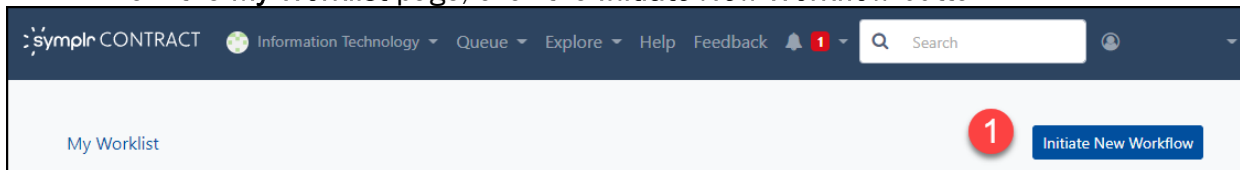
The phase tracker appears at the top of the page for each phase of contract. If you hover over a phase within the tracker, it displays workflow status information. As you progress through the workflow, you'll be able to see its progress at the top of each form.

						Days Active 0
Form Phase	Agreement Source Phase	Negotiation Phase	Executive Summary Phase	Signature Phase	Activation Phase	
Workflow Phase	Definition					
Initiation	Initiate a new workflow process.					
Form Phase	Populate the workflow-specific details and attach supporting documentation.					
Agreement Source Phase	Upload the main agreement and associated documentation.					
Negotiation Phase	Negotiate agreement terms with external and internal parties.					
Executive Summary	Perform final review of the negotiations and arrangements approved in the Negotiation Phase as well as the attachments prior to signature.					
Signature Phase	Collect signature on agreement from internal and external parties.					
Activation Phase	Activate the fully-executed agreement and associated documentation.					

Initiation Phase

The initiation phase is the first phase when you initiate a new workflow on the **My Worklist** page. To Initiate a New (Net New Contract) Workflow for a Master Agreement:



1. From the **My Worklist** page, click the **Initiate New Workflow** button.

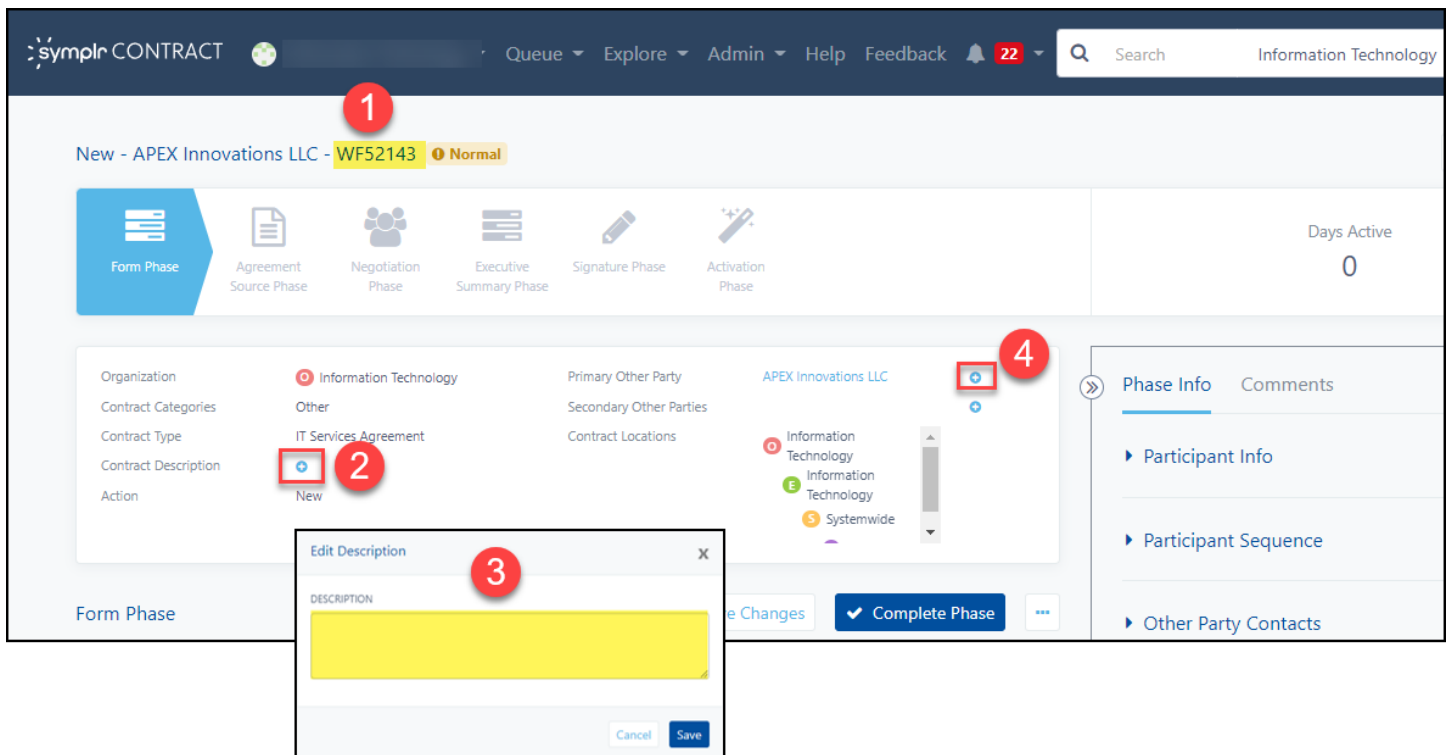


2. You'll need to fill out four required fields (in red). **Note: Don't change preselected options.**
 - a. **CONTRACT LOCATION:**
 - o When selecting the location, you'll choose the:
 - (O) Organization
 - (E) Entity
 - (S) Site: **Always select Systemwide, unless the agreement is for the RI (HMRI)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

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. However, any **Agreement** needing review/editing shouldn't be uploaded in this phase. These will be uploaded in the **Agreement Source 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**).
 - o Naming convention example: **"Vendor name service description": Medasource Master - Consulting Services.**
3. Enter a detailed, short description for the contract, in the **Description** box.
4. The "vendor" or **Primary Other Party** can be changed by selecting the  next to **Primary Other Party**.



The screenshot displays the 'simplr CONTRACT' interface. At the top, the navigation bar includes 'Queue', 'Explore', 'Admin', 'Help', 'Feedback', and a notification bell with '22'. The main header shows 'New - APEX Innovations LLC - WF52143' with a 'Normal' status indicator. Below this is a row of phase buttons: 'Form Phase' (highlighted), 'Agreement Source Phase', 'Negotiation Phase', 'Executive Summary Phase', 'Signature Phase', and 'Activation Phase'. The 'Form Phase' section contains several fields: 'Organization' (Information Technology), 'Contract Categories' (Other), 'Contract Type' (IT Services Agreement), 'Contract Description' (with a blue plus sign icon), and 'Action' (New). The 'Primary Other Party' dropdown is set to 'APEX Innovations LLC' and has a blue plus sign icon. A right-hand sidebar shows 'Phase Info' and 'Comments' tabs, with 'Phase Info' expanded to show 'Participant Info', 'Participant Sequence', and 'Other Party Contacts'. A 'Complete Phase' button is visible at the bottom right. A red callout box '1' points to the workflow ID 'WF52143'. A red callout box '2' points to the blue plus sign next to 'Contract Description'. A red callout box '3' points to the 'Edit Description' dialog box, which has a yellow background and a 'Save' button. A red callout box '4' points to the blue plus sign next to the 'Primary Other Party' dropdown.

IT – Phase Owner

QSG for Master Agreements

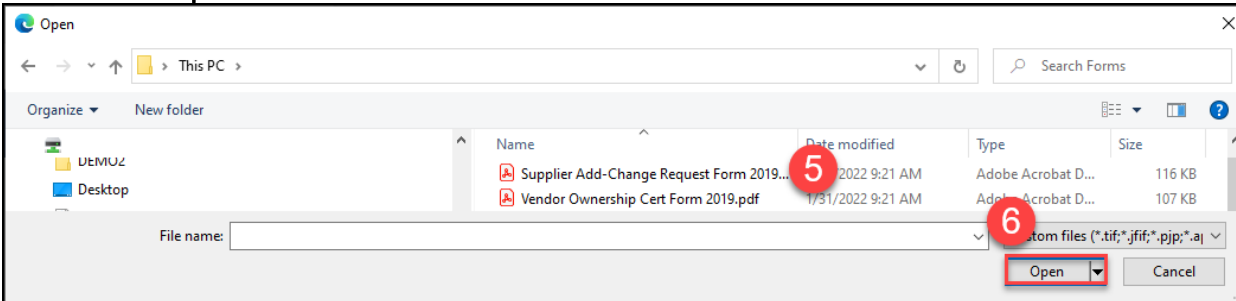
Completing the Form

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**.

IT – Phase Owner QSG for Master Agreements

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**.

The screenshot shows the 'Add Attachment' form with the following fields and values:

- ATTACHMENT NAME ***: Vendor Ownership Cert Form 2019.pdf (highlighted with a red box and a red circle containing the number 7)
- ATTACHMENT CATEGORY ***: Vendor Ownership Form (highlighted with a red box and a red circle containing the number 8)
- ATTACHMENT SUBJECT**: (empty)
- ADDITIONAL NOTES**: (empty)
- EFFECTIVE DATE**: (empty)
- EXPIRATION DATE**: (empty)
- Mark as Confidential
- Visible to External Party users
- Buttons**: Cancel, Save (highlighted with a red box and a red circle containing the number 9)

IT – Phase Owner QSG for Master Agreements

10. Click Complete Phase.

The screenshot shows a 'Form Phase' interface with the following details:

- Organization: Information Technology
- Contract Categories: Other
- Contract Type: IT Services Agreement
- Contract Description: [dropdown arrow]
- Action: New
- Primary Other Party: APEX Innovations LLC
- Secondary Other Parties: [dropdown arrow]
- Contract Locations: Information Technology, Systemwide, IT

At the bottom right, there are three buttons: 'Save Changes', 'Complete Phase' (highlighted with a red box and a red circle containing the number 10), and a three-dot menu icon.

Attachments

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

1. In the form after uploading.

The screenshot shows the 'ATTACH PRIMARY OTHER PARTY'S CERTIFICATE OF INSURANCE (COI)' section of the form. It includes three 'ADD ATTACHMENT' buttons. Below the third button, an attachment is shown:

- Attachment Name: symplr Contract
- Category: Other
- Date/Time: 11/14/2022 1:07PM - Estella Soto

The attachment card is highlighted with a yellow background and a red circle containing the number 1.

2. Under Phase Info>Attachments.

The screenshot shows the 'IT Intake Form' interface. The 'Attachments' section is highlighted with a red box and a red circle containing the number 2. The attachment details are:

- Attachment Name: symplr Contract
- Category: Aid.pdf
- Other: Other
- Date/Time: 11/14/2022 1:07PM - Estella Soto

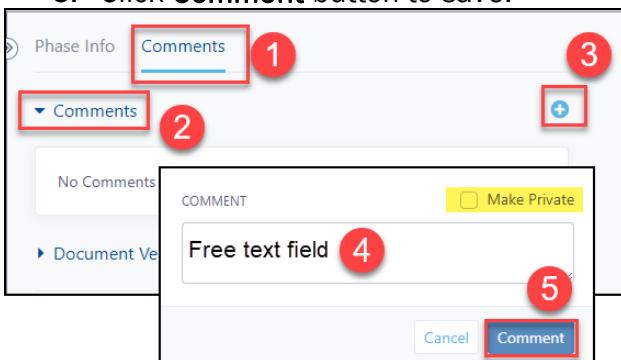
A 'Manage All (1)' button is visible below the attachment card.



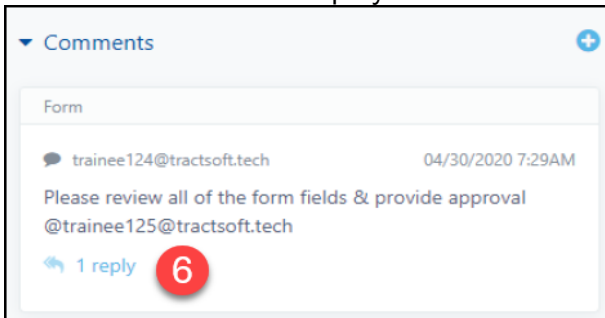
Comments

In addition to populating fields, you can leave comments.

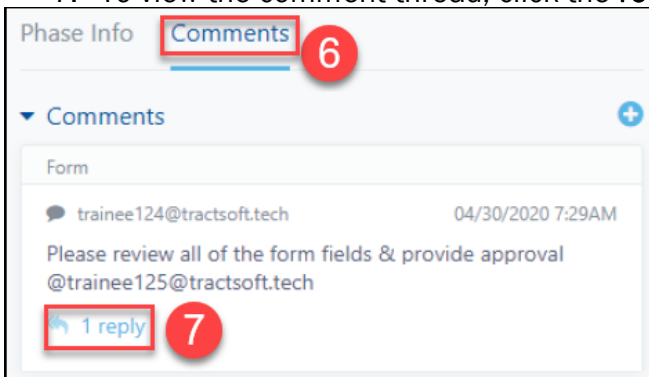
1. In the workflow, select the **Comments** tab.
2. Click **Comments**.
3. Click the **blue plus icon** to the right of the **Comments** section header.
4. In the comment pop-up window, type a message.
 - o You have the option to make the comment private.
5. Click **Comment** button to save.



6. The comment displays in the **Comments** tab with the total number of replies.



7. To view the comment thread, click the **reply** hyperlink.

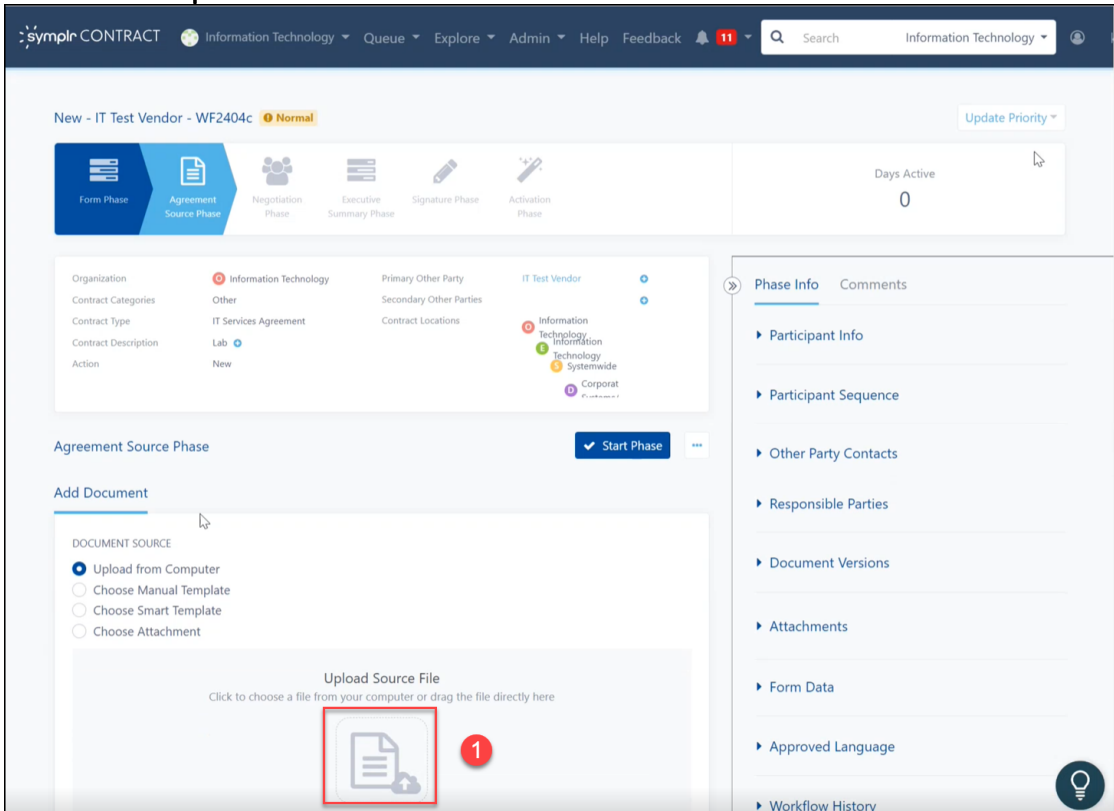




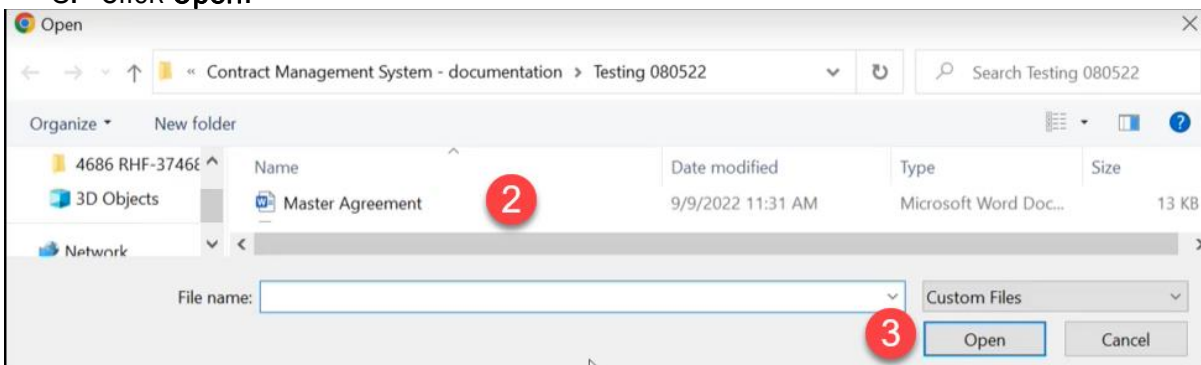
Agreement Source Phase

In this phase, you'll upload the agreement.

1. Click **Upload Source File**.



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



IT – Phase Owner QSG for Master Agreements

- 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.
 - Insight Global Master
 - Insight Global BAA
 - Insight Global SOW-Consultant Name (10312022-12312022)
- Select the appropriate **Document Category** from the dropdown.
- Click **Save**.

Add Document [X]

DOCUMENT NAME *
Master Agreement Vendor Test .docx

DOCUMENT CATEGORY *
IT Master Agreement

Cancel Save

- Click **Start Phase**.

Organization: Information Technology
Contract Categories: Other
Contract Type: IT Services Agreement
Contract Description: [empty]
Action: New

Primary Other Party: APEX Innovations LLC
Secondary Other Parties: [empty]
Contract Locations: Information Technology, Information Technology, Systemwide, IT

Agreement Source Phase [7] Start Phase

IT Master Agreement + Add Document

Master Agreement Vendor Test.docx
IT Master Agreement
11/30/2022 10:53AM - Estella Soto

Copy Link Delete Download Upload New Version View History

- Click **Complete Phase**.

Agreement Source Phase [8] Complete Phase

IT Master Agreement + Add Document

Master Agreement Vendor Test.docx
IT Master Agreement
11/30/2022 10:53AM - Estella Soto

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