sCONTRACT
SCM-Initiator/Requestor

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HOUSTON Methodist LEADING MEDICINE

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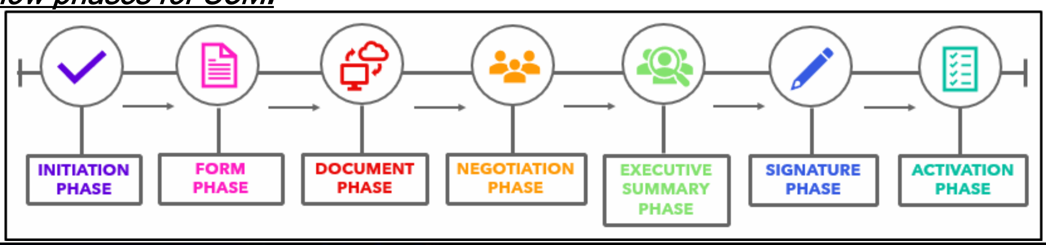
symplr Contract

symplr Contract is a user-friendly application that supports the contract management lifecycle. 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.

Workflow Overview

A workflow is the process an agreement flows through, from initiation to activation. In addition to outlining the contracting process, workflows also allow you to outline key individuals responsible for completing specific actions in each workflow phase.

General Workflow phases for SCM:



Phase definitions in the SCM Workflow:

Workflow Phase	Completed By	Definition
Initiation	Phase Owner/Workflow Moderator (Contract Admin or Contract Moderator/Initiator)	Initiate a new workflow process
Form	Phase Owner/Workflow Moderator (Contract Admin or Contract Moderator/Initiator)	Populate the workflow specific details and attach supporting documentation
Document	Phase Owner (Contract Admin for Editing)	Upload the main agreement and associated documentation and redline
Negotiation	Phase Owner (Contract Admin and Reviewers for Internal/External Editing)	Negotiate agreement terms with internal and external parties
Executive Summary	Phase Owner (TAMMI and Approvers for Final Review)	Perform final review of the negotiated terms and conditions approved in the Negotiation phase, as well as form data, prior to signature
Signature	Phase Owner (TAMMI/CHANDRA for Execution)	Collect signature on agreement from internal and external parties
Activation	Phase Owner (Contract Admin for Activation/Notification)	Activate the fully executed agreement and associated documentation and create notifications/alerts

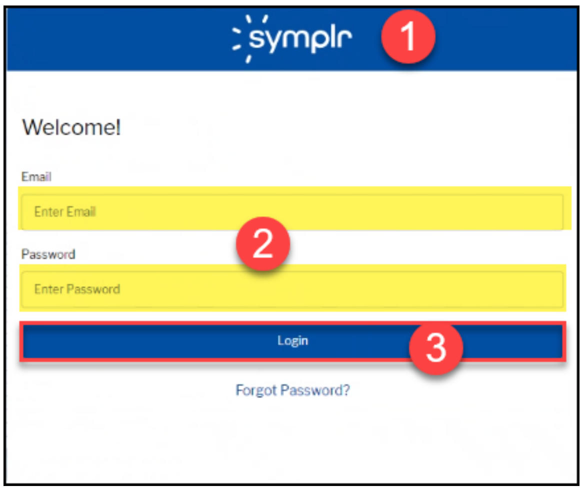
Logging In

To log into symplr Contract, you need an e-mail address and password.

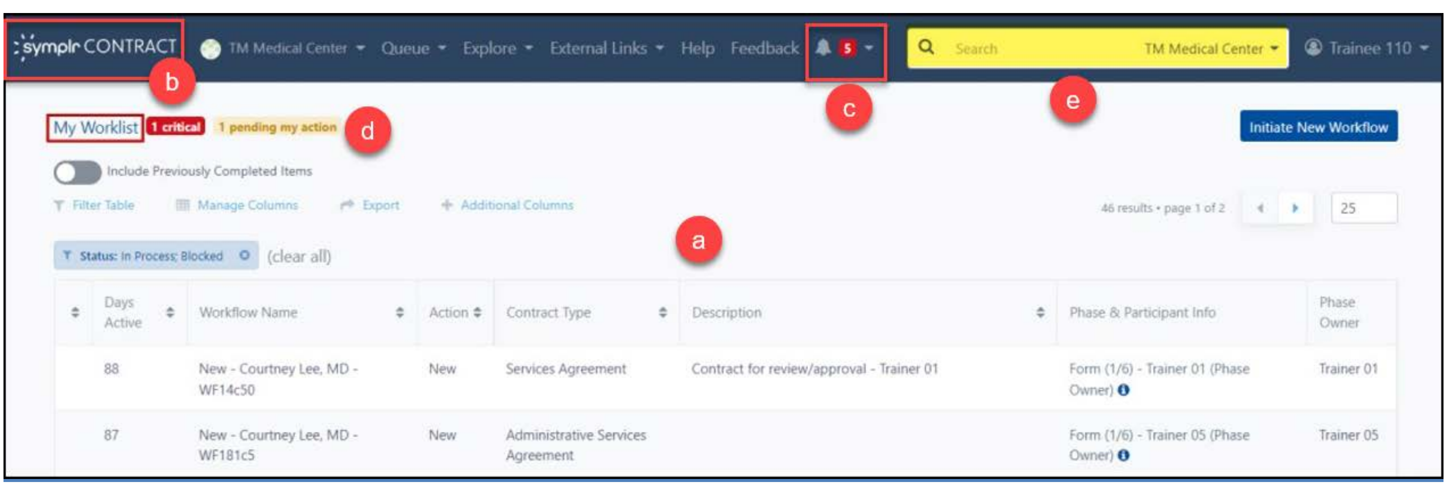
Login Procedure:

Open your browser.

1. Navigate to the tenant using the appropriate URL.
2. The Login page displays.
3. Type the Email and Password.
4. 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 home button.
c. The bell icon lights up red with number of new notifications.
d. Any pending actions will be displayed in yellow.
e. You can perform a text search within the contract library

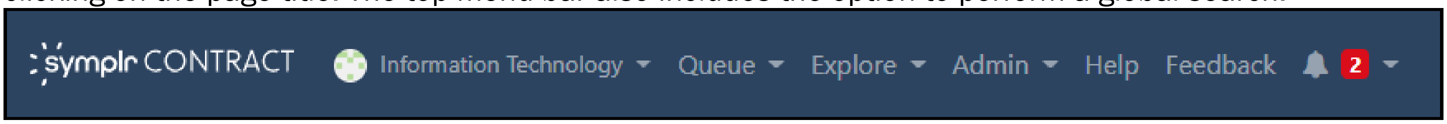


Navigation

Navigation in symplr Contract allows you to quickly search and filter data within each page.

Top Menu Bar

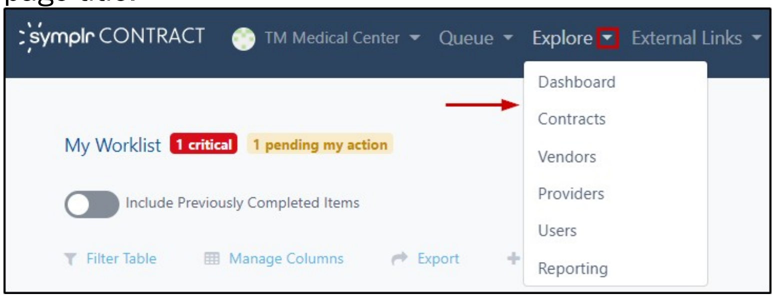
The top menu bar is located at the top of the page and allows you to quickly navigate between pages by clicking on the page title. The top menu bar also includes the option to perform a global search.



The top menu bar includes:

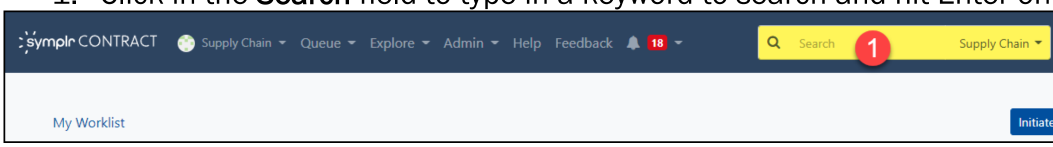
Menu Option/Page	Definition
Health Organization	Select the organization name NOTE: If there are multiple organizations you have permissions to access, you can select the desired organization name.
Explore: Contracts	Displays a library of fully executed agreements
Explore: Vendors	Displays the directory of vendors (other party)
Explore: Providers	Displays the directory of physicians or physician groups (other party)
Explore: Reporting	Allows you to run ad-hoc reports, access saved reports, and schedule reports
Help	Navigates you to the product knowledge base NOTE: When you select the Help option, the knowledge base opens up in a new tab within your browser. The knowledge base provides standard product documentation, including release notes and appendices.
Feedback	Submit feedback about the symplr Contract application to symplr
Notifications	Displays any alerts for review
Search	Allows you to search the entire database using keywords, based on user permissions

To navigate to a page, hover over the desired drop-down menu or click the drop-down arrow and select the page title.

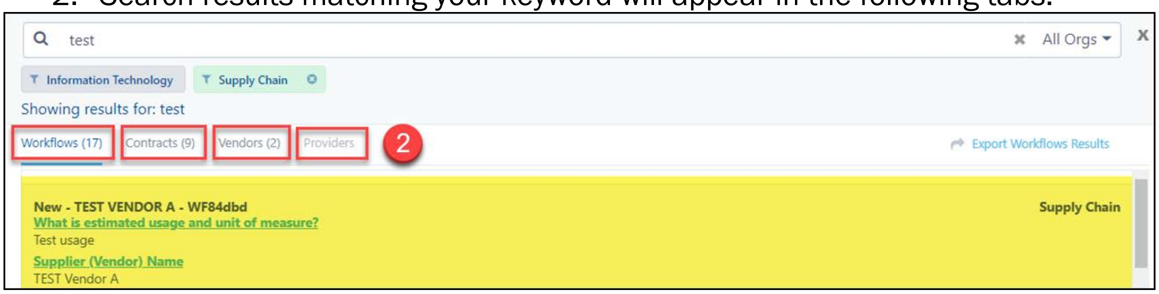


Perform a Search

1. Click in the **Search** field to type in a keyword to search and hit Enter on your keyboard.



2. Search results matching your keyword will appear in the following tabs:

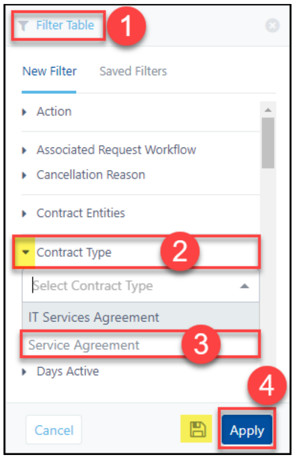


Tab	Definition
Workflows	Displays all workflows that associate to the keyword NOTE: Selecting the workflow record navigates you to the workflow record based on user permissions.
Contracts	Displays all contracts that associate to the keyword NOTE: Selecting the contract record navigates you to the applicable Contract Summary page within the Contract Library, based on user permissions.
Vendors	Displays all vendor (other party) records that associate to the keyword NOTE: Selecting the vendor other party record navigates you to the applicable vendor details page in the Vendor Directory.

Filters

Allow you to define and narrow search results based on criteria, such as priority, workflow name, and contract type. To access the list of filters:

1. Click the Filter Table hyperlink.
2. To select a filter, select the filter header and expand the filter options.
3. You can then select the specific filter you want to apply to the table or list.
4. Click **Apply**.
   - If there are filters you utilize often, you can save your settings by clicking the floppy disk icon.



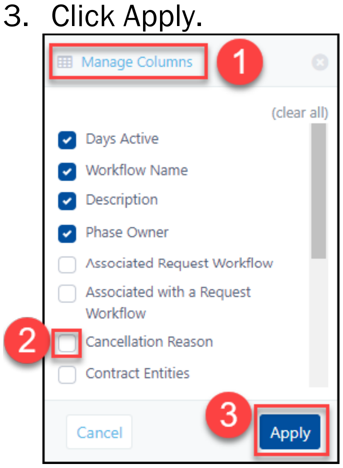
Columns

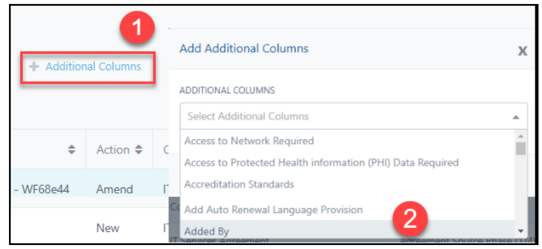
Manage the columns that display on a page to view additional information.

To manage columns: 1. Click the Manage Columns hyperlink.

2. To select a column, select the checkbox next to the column header.
   - By selecting the checkbox, you are choosing to display the column in your worklist.
   - You can re-order the columns by dragging and dropping.

3. Click Apply.



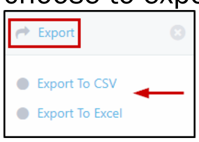


You can add custom fields as columns in a table, based on the page. To add additional columns:

1. click the + Additional Columns hyperlink.
2. In the Add Additional Columns dialog box, select the column(s) in the Additional Columns drop-down field.
3. Click the **Add**, the page refreshes with the column(s) you define.

Export Feature

Export records and column information that display on the page by clicking the Export icon. You can choose to export the information to a CSV or Excel file for download.



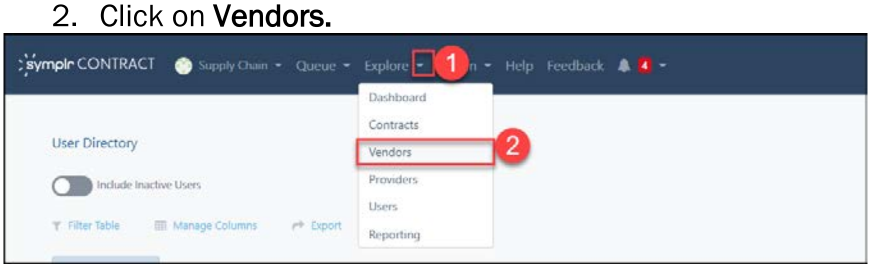
Tool Tips

Displays additional information when you hover over the "i" icon. The information that displays may differ based on the field or column.

Vendors

The **Vendor Directory** page houses all of the vendor (other party) records within symplr Contract.
To search for a vendor:

1. In the top menu bar click on the **Explore** drop-down menu option.
2. Click on **Vendors.**



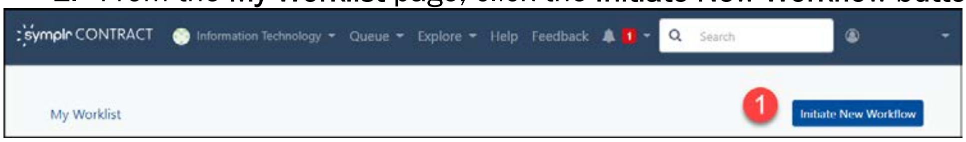
3. The vendor directory appears.
   a. You can perform a search.
   b. You can filter the options displayed.

Initiation Phase

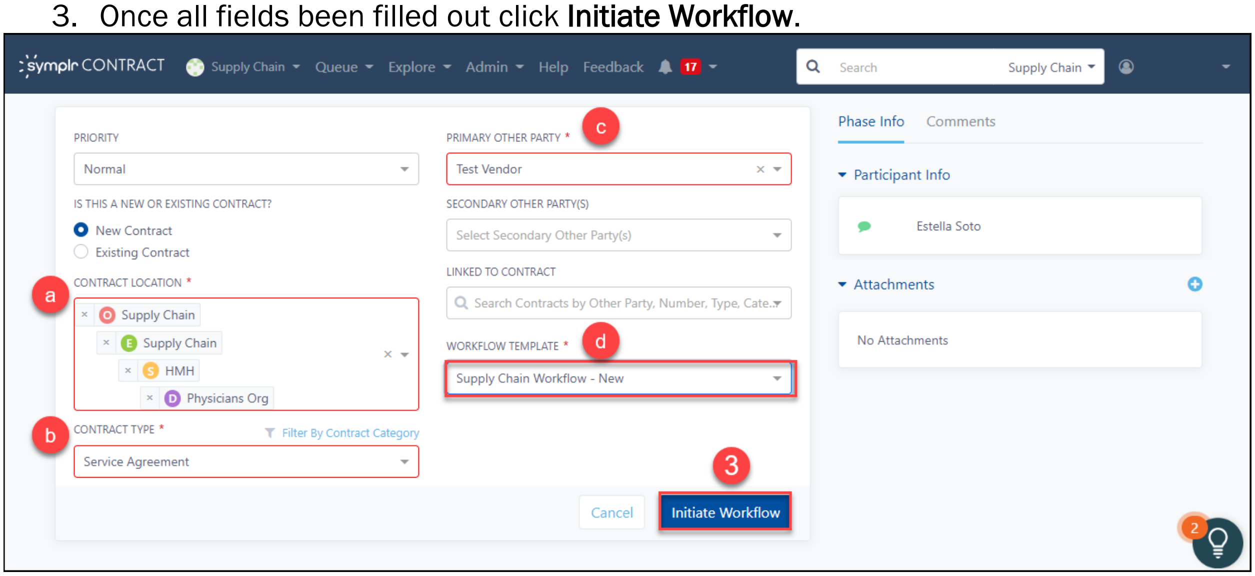
The initiation phase is the first step to initiate a new workflow on the **My Worklist** page.

To initiate a new workflow agreement/amendment workflow:

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



2. You will need to fill out four required fields (in red). Note: *Do not change preselected options.*
   a. CONTRACT LOCATION
      - When selecting the location, you will choose the:
        (O) Organization
        (E) Entity
        (S) Site:
        (D) Department.
   b. CONTRACT TYPE
   c. PRIMARY OTHER PARTY: (Vendor)
   d. WORKFLOW TEMPLATE: ***Supply Chain Workflow–New*** or ***Amendment***
3. Once all fields been filled out click **Initiate Workflow**.



Form Phase

A unique workflow ID is assigned to the workflow as highlighted below. In the **Form Phase** you will complete questions pertaining to the type of contract you are requesting. You can also leave comments and upload supporting documents.

Form Sections

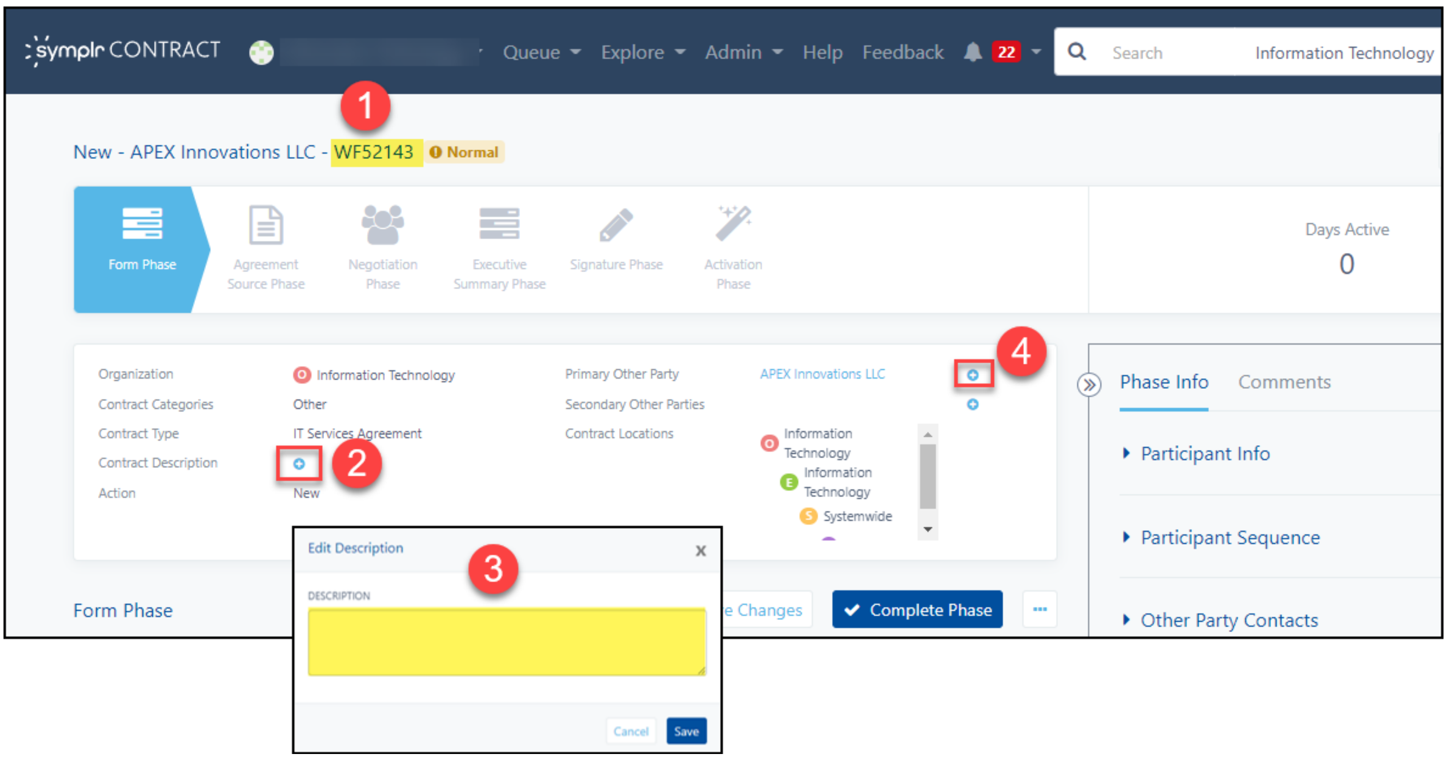
Field	Definition
Contract Initiation	Description of request
Supplier Profile Info	Vendor info
Supplier Add Info	Vendor add info and required forms
Dept Profile Info	“Requesting dept info” or “Dept info"?
Financial Info	Financial info and approvals
MedApproved Info	MedApproved info and approvals
Product and/or Service Info	Product and/or Service specific info
Risk and IT Info	Risk and IT info and approvals
Capital and Research Info	Capital and research info and approvals
Clinical Info	Clinical research info and approvals

Form Phase

In the **Form Phase** you will complete questions pertaining to the type of contract you are requesting, or simply completing the contract cover sheet. You can also leave comments and upload supporting documents. However, any Agreement needing review/editing should not be uploaded in this phase. These will be uploaded in the **Document phase.**

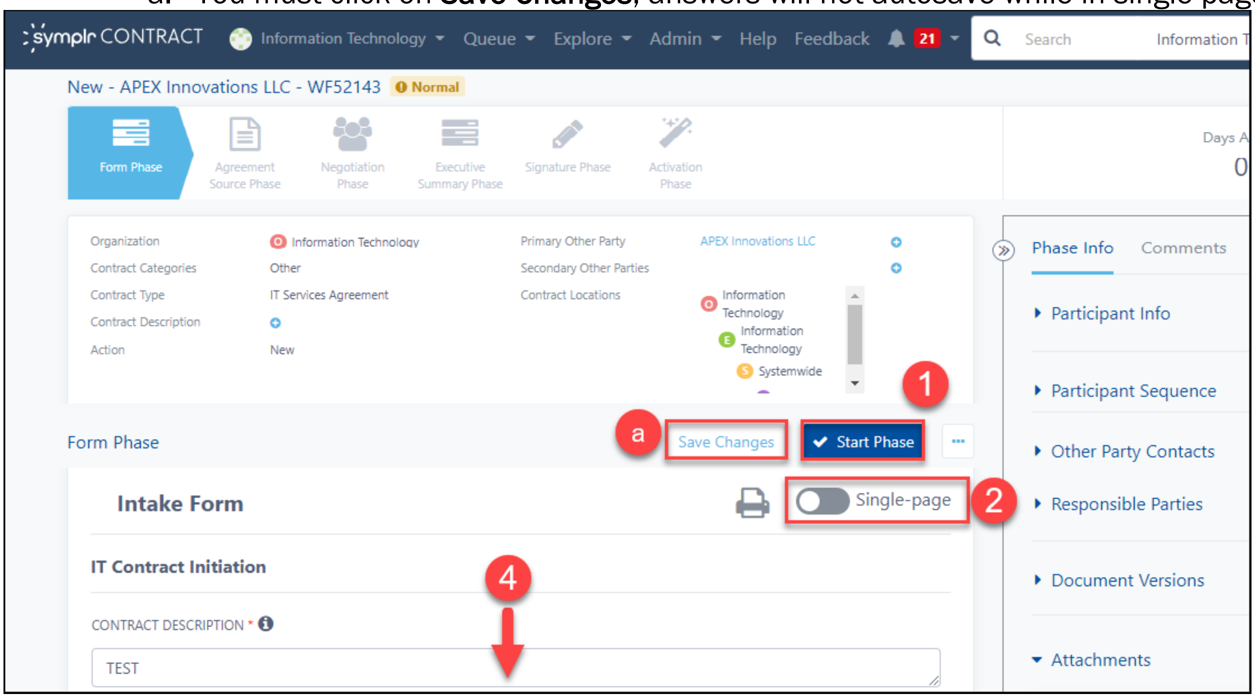
1. A unique workflow ID is assigned to the workflow as highlighted below.

1. Click the blue plus sign next to **Contract Description**. (Description will display in ***My Worklist***)
2. Enter a detailed short description for the contract, in the description box.
3. The "Vendor" or Primary Other Party can be changed by select the next to **Primary Other Party**.

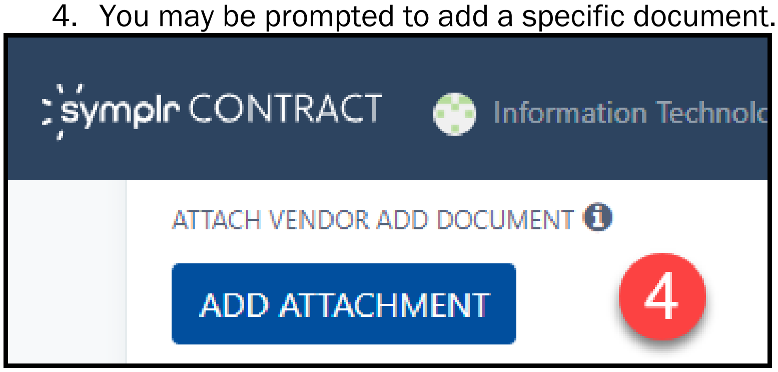


Completing the Form

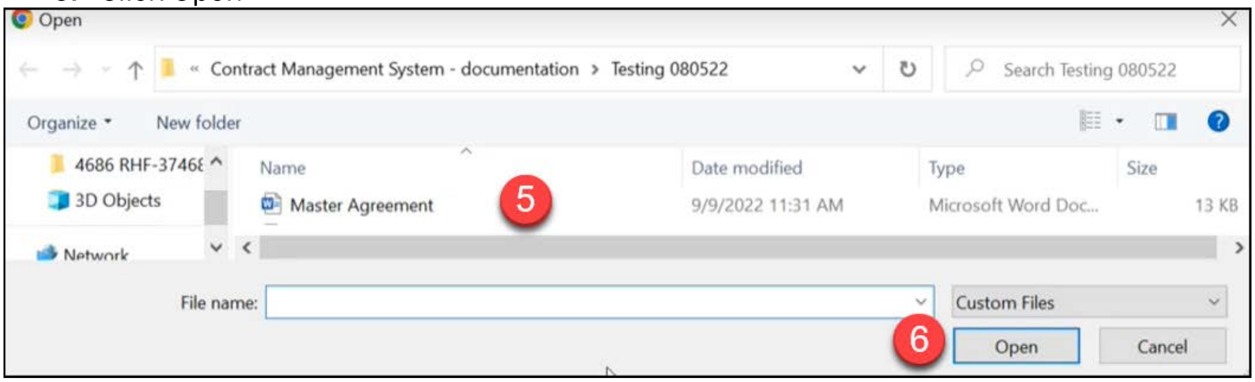
1. Click **Start Phase**.
2. Click on the toggle to allow for **Single-page** view. Scroll down to complete.
   - A red asterisk indicates a required field.
3. Answer all required questions, answers may trigger additional required questions to be answered.
   a. You must click on **Save Changes**, answers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



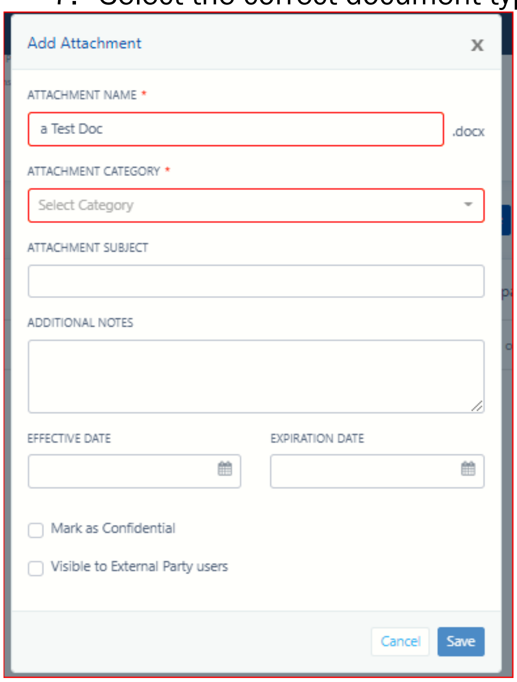
4. You may be prompted to add a specific document. Click on **ADD ATTACHMENT**.



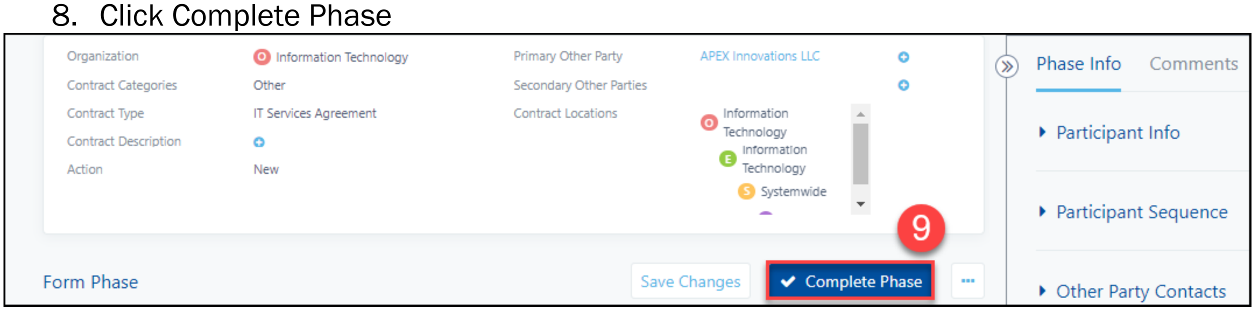
5. Select the appropriate document.
6. Click Open



7. Select the correct document type in the ATTACHMENT CATEGORY drop down menu.



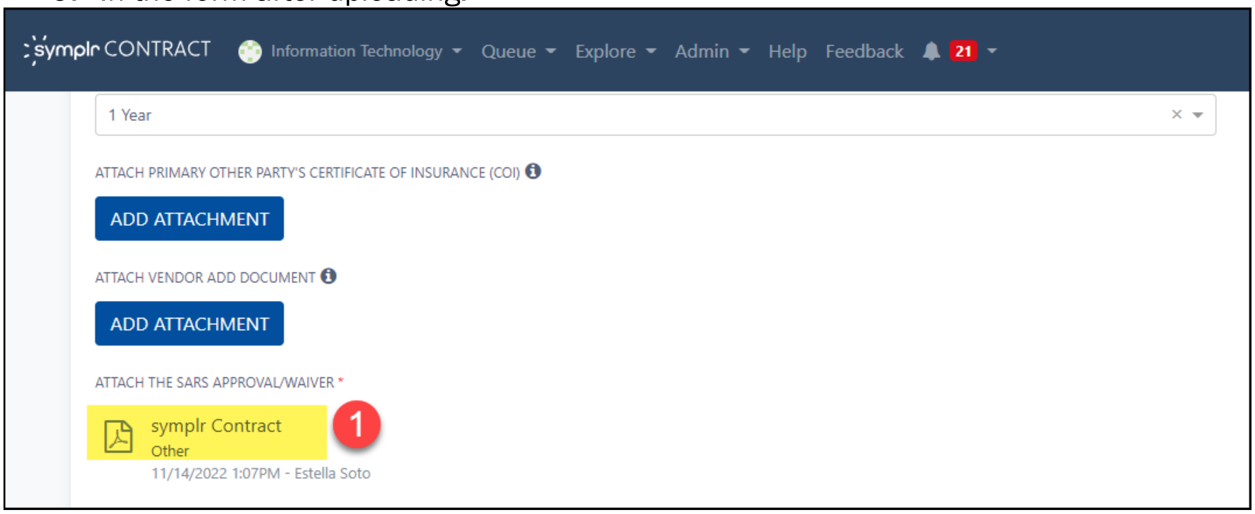
8. Click Complete Phase



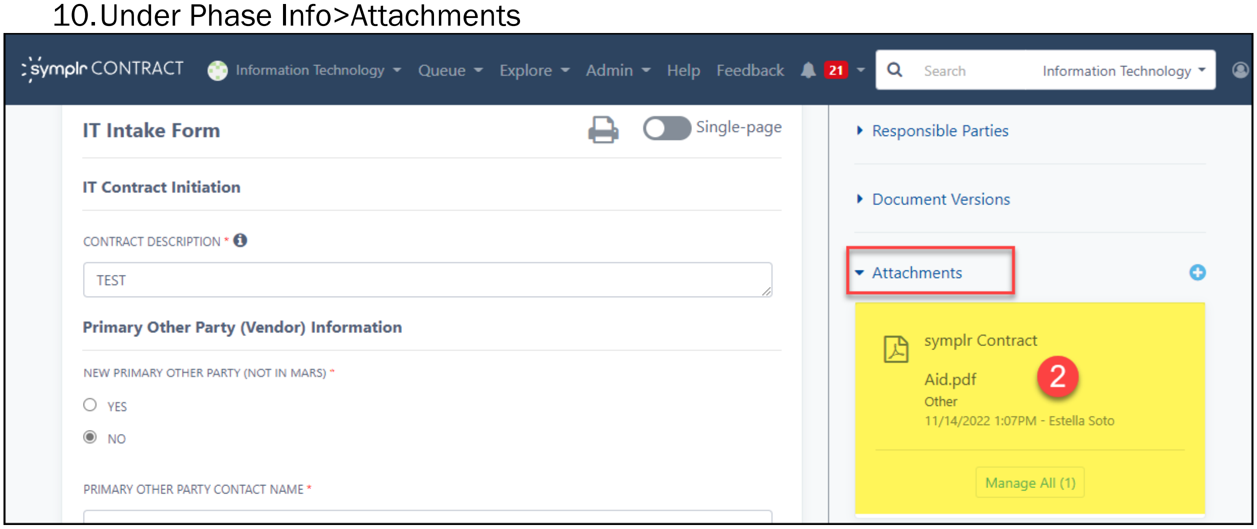
Attachments

As upload certain documents. You will be able to see your uploaded documents in the following places:

9. In the form after uploading.



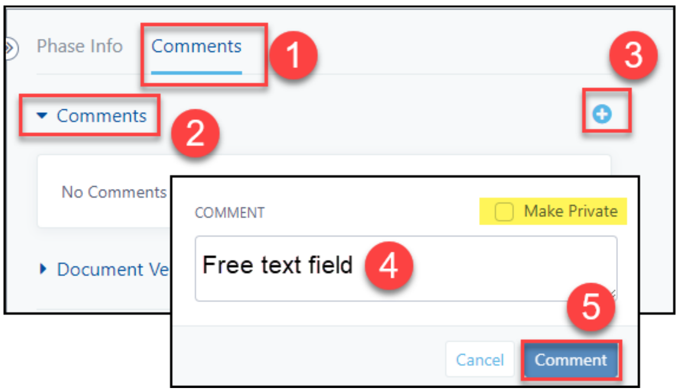
10. Under Phase Info>Attachments



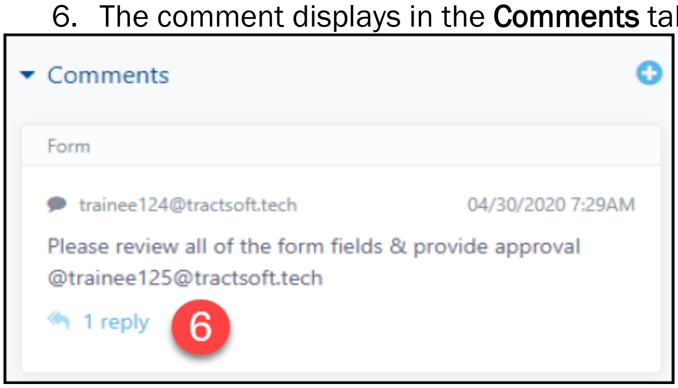
Comments

In addition to populating fields, you can leave comments.

1. In the workflow, select the **Comments** tab
2. Click on **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
   - 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