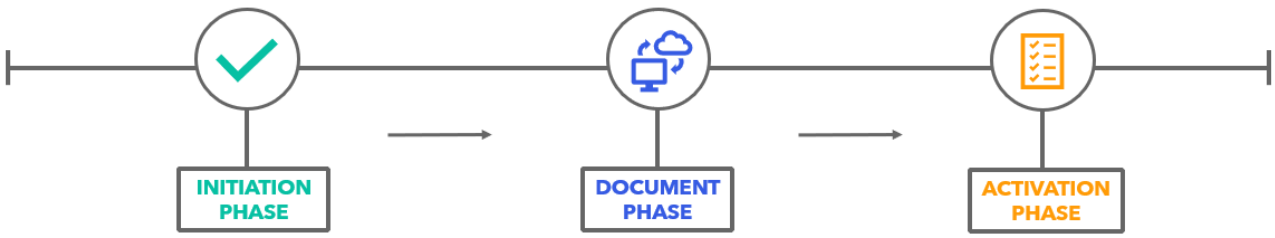
Add Agreement Workflow Job Aid

The Add Agreement workflow template allows you to load fully executed contracts into the Contract Library.

The symplr's best practice Add Agreement workflow template type includes three phases:



symplr's best practice Add Agreement Workflow phases include:

Initiation

Initiate a new workflow process

Document (Source)

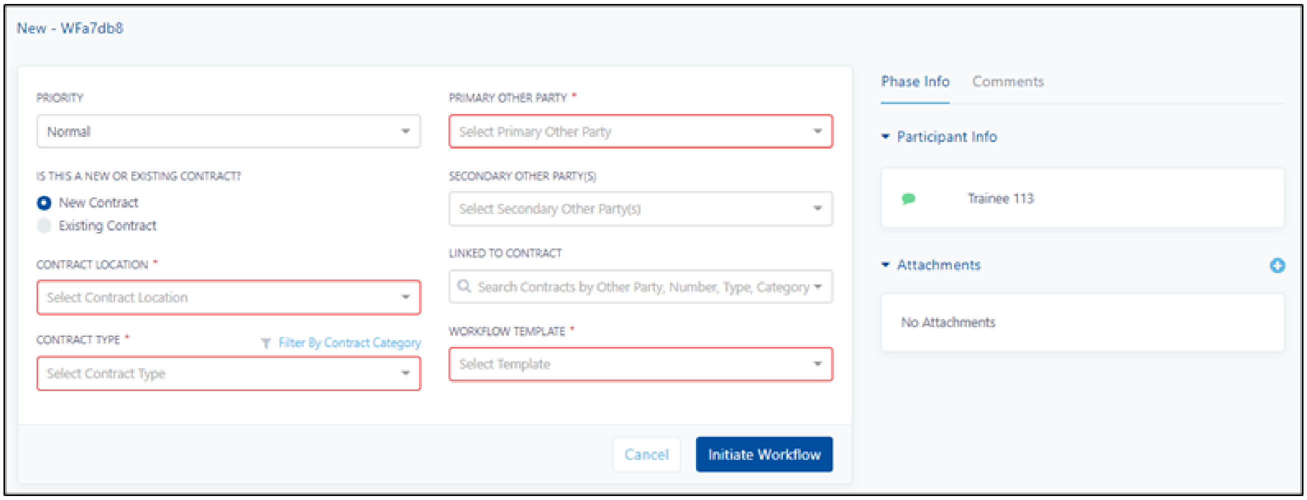
Upload the fully executed main agreement and associated documentation

Activation

Activate the fully executed agreement and associated documentation

Initiation Phase

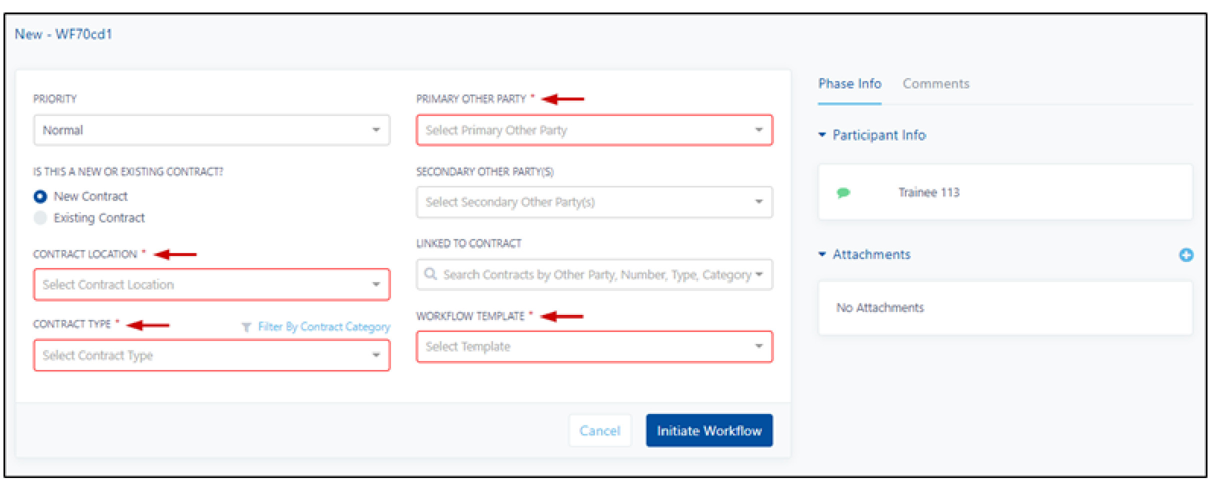
The Initiation phase is the first phase when you initiate a new workflow on the **My Worklist** page.



Initiate New Workflow Procedure:

1. Navigate to the **My Worklist** page, and click the **Initiate New Workflow** button.

2. Enter information in the following fields, as required:



Priority

Urgency of the workflow, options include Normal and Critical
NOTE: This field may not display based on tenant configuration.

Is This A New Or Existing Contract?

Options include:
· New Contract – the workflow is for a new contract that does not yet exist in the Contract Library
· Existing Contract – the workflow is for a contract that currently exists in the Contract Library, such as an amendment, renewal, extension, or termination

Contract Location

Physical location that associates with the agreement
NOTE: It is best practice to select a contract location below the organization level.

Contract Type

Type of agreement
NOTE: You may click the Filter by Contract Category icon to select a contract category.

Primary Other Party

Vendor or provider that primarily associates to the workflow
NOTE: You can only select a single primary other party.

Secondary Other Party(s)

Additional vendors or providers that associate to the workflow
NOTE: You can select multiple secondary parties.

Linked to Contract

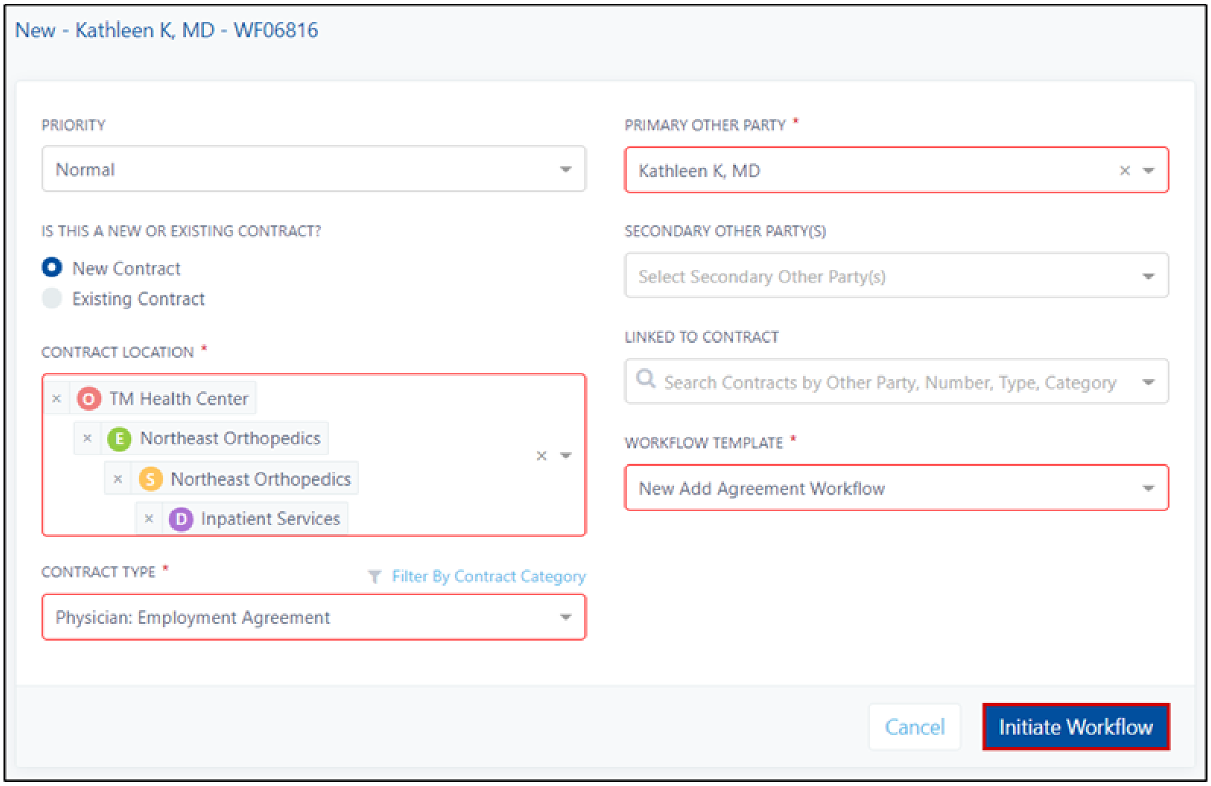
Existing contract ID to which you want to associate the new contract

Workflow Template

Template that associates with the selected contract type and location of agreement
NOTE: The workflow templates only display if you select the contract location and type.

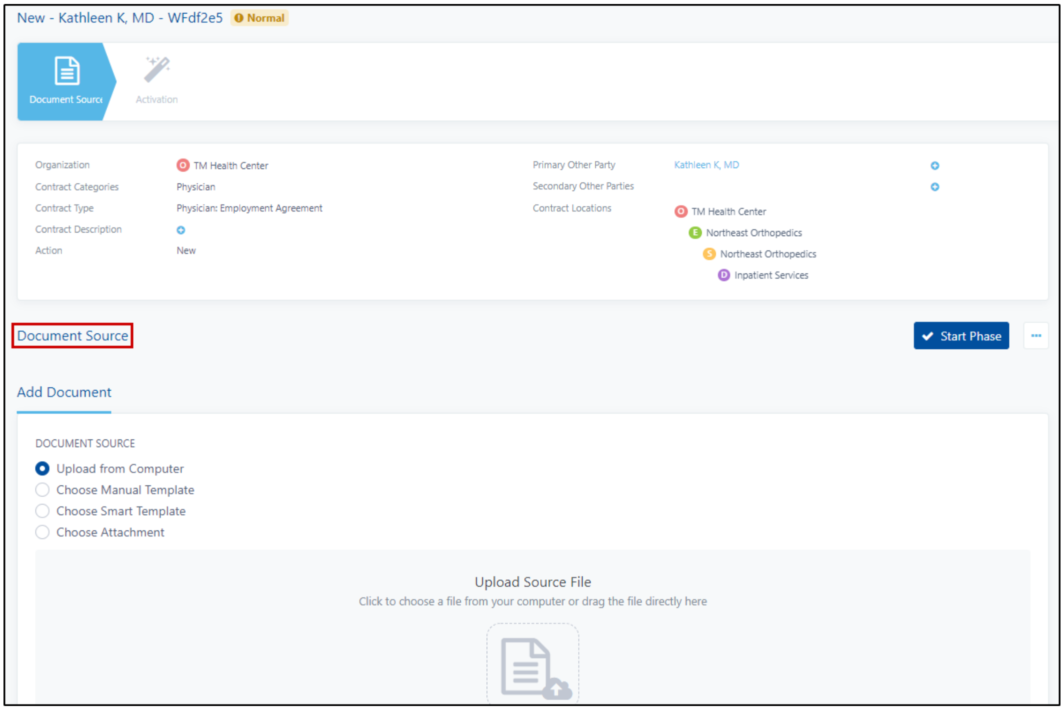
A red asterisk indicates a required field. When you initiate a new workflow, the system automatically assigns a system-generated workflow ID.

3. Click the **Initiate Workflow** button.



Document (Source) Phase

The Document phase, also known as the Document Source phase, allows you to associate the main agreement and other documentation to the workflow.



Most common source documents include:

Main Agreement

Legal binding contractual agreement between the organization and vendor or provider (other party)

Business Associate Agreement (BAA)

Allows all covered healthcare entities to maintain protected health information (PHI) security and overall HIPAA compliance with each partner

Certificate of Insurance (COI)

Provides information on specific insurance coverage

Fair Market Value (FMV)

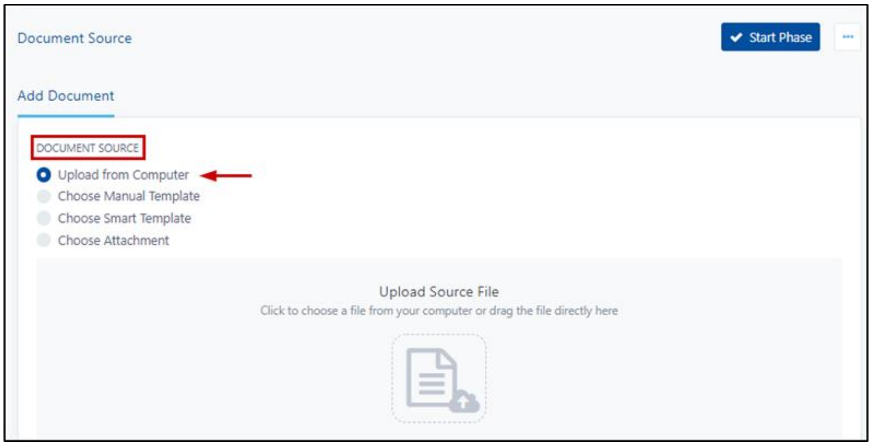
Defines fair market value standards as set by industry trends or as provided by a qualified valuation expert for transactions that include value in cash or in-kind should meet

Request for Proposal (RFP)

Allows you to select the vendors responsible for submitting business proposals around the procurement of a commodity, service, or asset

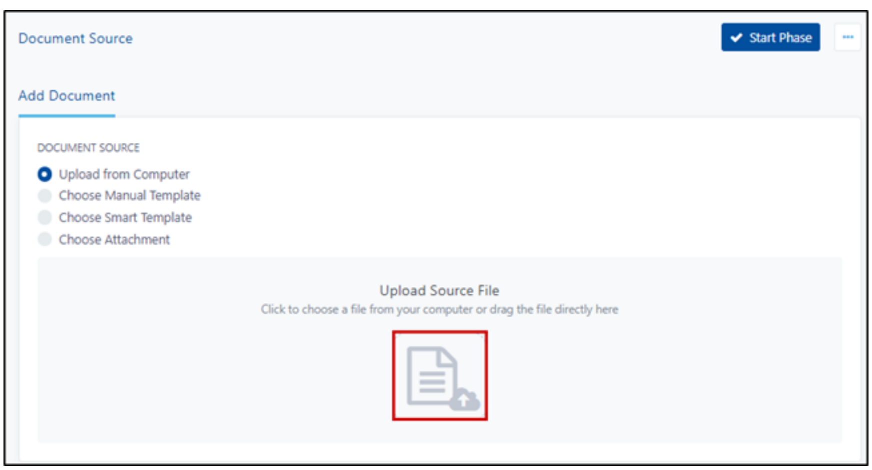
Upload Main Agreement Procedure:

1. Navigate to the My Worklist page, and select the desired workflow. In the document viewing window, click the Upload from Computer, Choose Template, or Choose Attachment radio button under the Document Source header located in the Add Document tab.



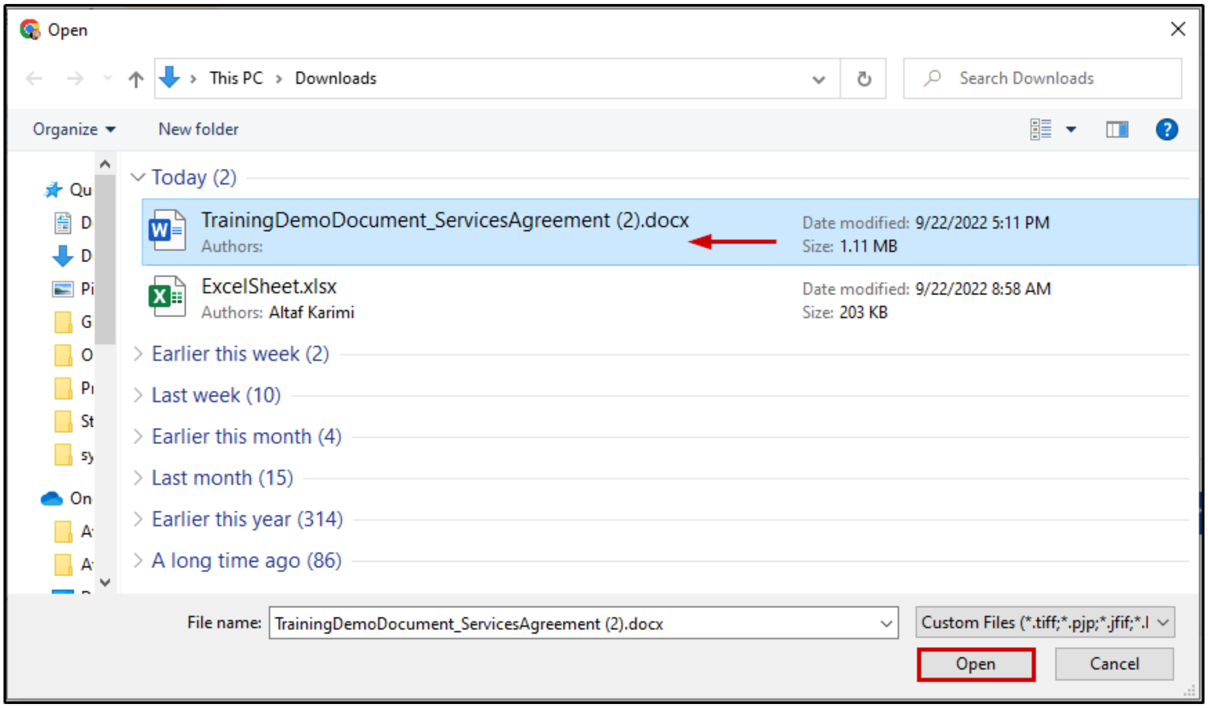
For training purposes, utilize the Upload from Computer radio button.

2. Click the Document Upload icon.

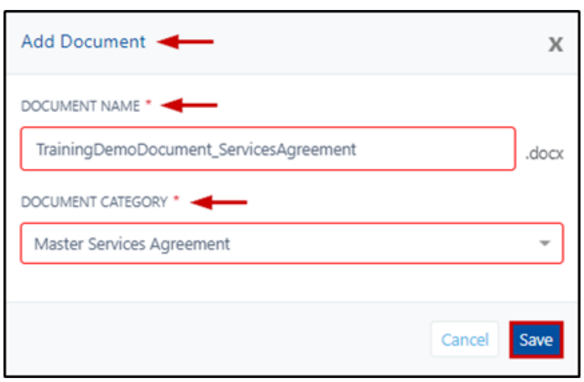


You may also drag and drop the file directly from your local computer to the Upload Source File section in the Add Document tab.

3. When the **Open** dialog box displays, select the desired **file name**, and click the **Open** button.



4. In the **Add Document** dialog box, enter information in the following fields, and click the **Save** button.



Document Name

Name of the document you are uploading
NOTE: You can rename the file in this field.

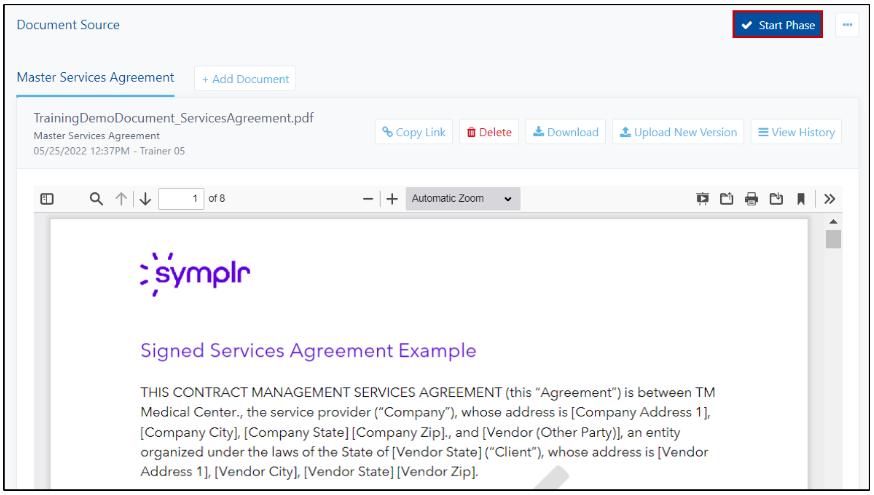
Document Category

Document type
NOTE: Depending on the document category you select, additional fields may display.

5. The main agreement displays in the document viewing window.

Start and Complete Phase

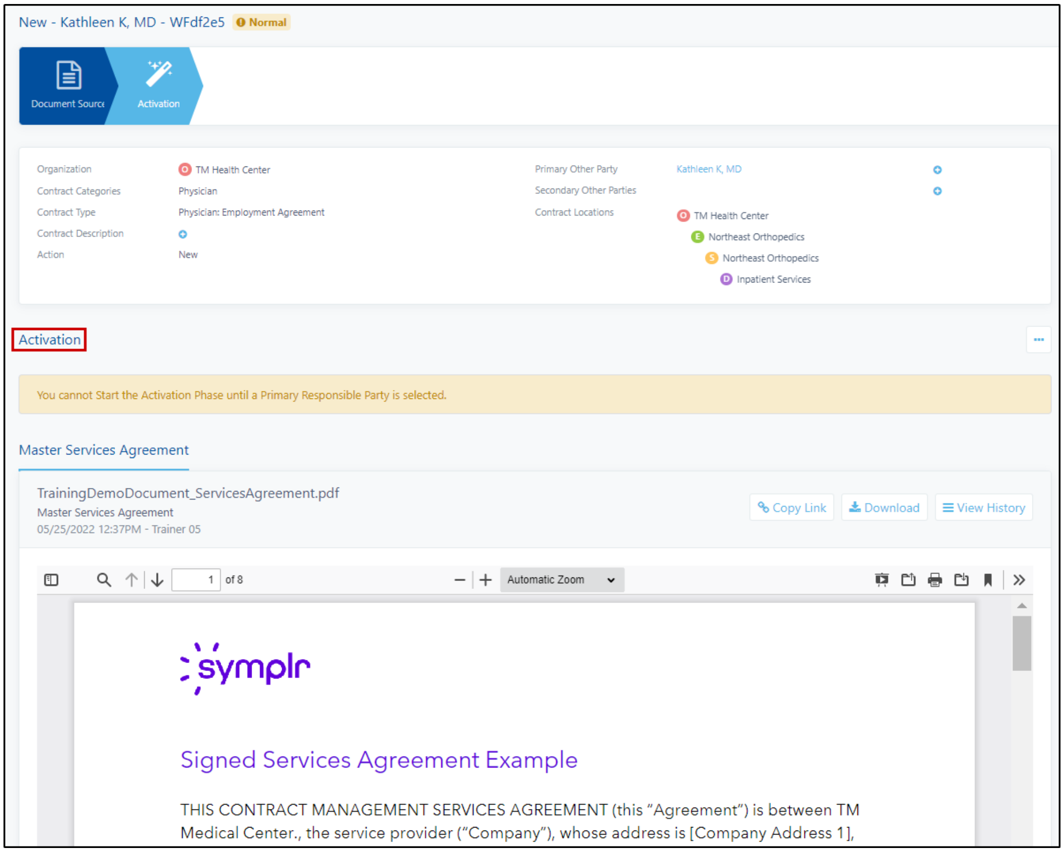
After you have upload all relevant documents and attachments, you are ready to start and complete the phase. To start the phase, click the **Start Phase** button.



To complete the phase, click the **Complete Phase** button. The **Complete Phase** button allows you to move the workflow to the Activation phase.

Activation Phase

The Activation phase is the last phase of the workflow. In the Activation phase, you can review the main agreement and associated documents, review workflow phase information, assign responsible parties, and define key terms.



Add Responsible Parties

Before you can start and complete the phase, you must define a responsible party.

The **Responsible Parties** section reflects individuals responsible for taking action on critical dates that associate to the contract. Examples include contract expiration or auto renewal dates.

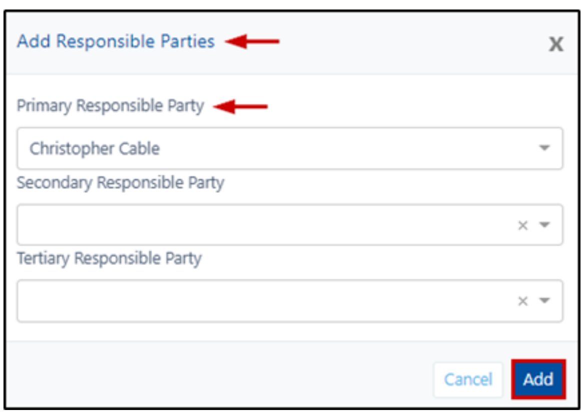
You can only assign users with role = Admin, Editor, or Contract Moderator as responsible parties to a workflow.

Add Responsible Party to Workflow Procedure:

1. In the workflow, select the **Phase Info** tab to display the **Responsible Parties** section.

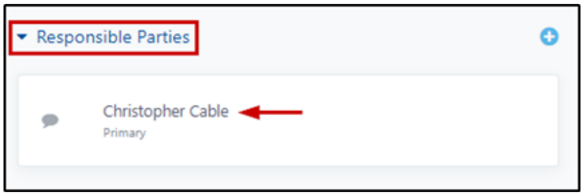
2. Click the **blue plus** icon to the right of the **Responsible Parties** section header.

3. In the **Add Responsible Parties** dialog box, select the **name** of the responsible party. Click the **Add** button.



You can assign a primary, secondary, and tertiary responsible party to the workflow. The drop-down field displays all of the users in the **User Directory** page who are active with roles = Admin, Editor, or Contract Moderator and permissions for the applicable location(s) and contract type(s).

4. The responsible party displays in the **Responsible Parties** section.

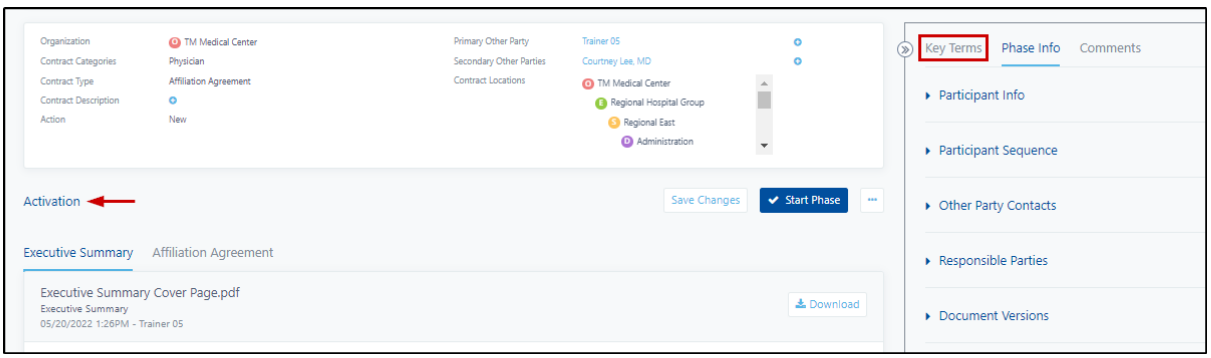


Define Key Terms & Complete Form Fields

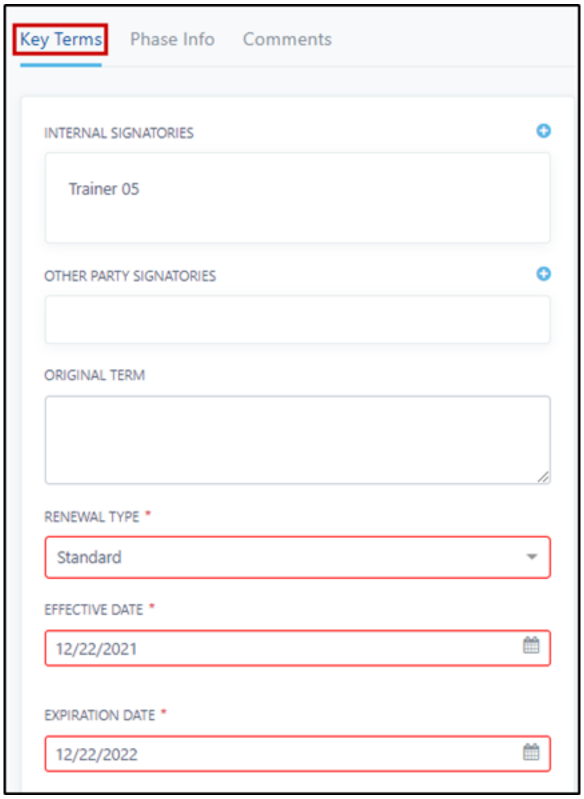
After you assign the responsible party(ies) to the workflow, you must define contract key terms.

Review & Update Key Terms Procedure:

1. Navigate to the **My Worklist** page, and select the desired **workflow**. When the Activation phase displays, navigate to the **Key Terms** tab.



2. In the **Key Terms** tab, review and update the key term fields as required:



Standard key term fields include:

Internal Signatories

Name of the internal party Signatory(ies)
NOTE: This field displays all of the internal Signatories that signs the agreement.

Other Party Signatories

Name of the external party Signatory(ies)
NOTE: This field displays all of the external (other party) Signatories that signs the agreement.

Original Term

Original terms of the agreement, such as the number of years of the contract

Renewal Type

Contract renewal type, options include:
· Standard - contracts that neither auto renew nor have an evergreen date, this is the default renewal type value
· Auto Renewal - contracts that include an automatic renewal clause that allows an agreement to continue for a defined period of time if the existing agreement is not renegotiated within a defined period of time
· Evergreen - contracts that automatically renew or by notice year to year until either party cancels

Effective Date

Date in which the contract is first in effect
NOTE: This field is required for all renewal types.

Expiration Date

Date in which the contract is no longer in effect or terminates
NOTE: This field is required if Renewal Type = Standard or Auto Renewal.

Depending on the option you select in the **Renewal Type** field, additional fields may display:

Renewal Term Months

Length of term between contract renewal events in months
NOTE: This field is required if Renewal Type = Auto Renewal.

Renewal Times

Total number of times the contract auto-renews
NOTE: This field is required if Renewal Type = Auto Renewal.

Renewal Notice Days

Number of days before the renewal date in which the other party provides notice regarding their intention to renew the contract
NOTE: This field is required if Renewal Type = Auto Renewal.

Review contract every x months

Number of months between each review schedule
NOTE: This field displays if Renewal Type = Evergreen. Setting a review schedule ensures that the contract's responsible parties receive alerts to perform review of the contract periodically.

After you validate all the fields are correct, click the **Start Phase** button to start the phase. Then, click the **Activate** button to complete the phase.

After you activate, the fully executed agreement moves out of the workflow and into the **Contract Library**.