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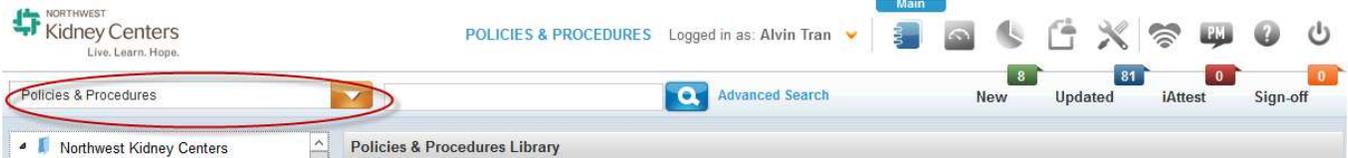
Quick Reference for Contracts Manager

Go to: nwkidney.policymedical.net

Part One

How to get a contract approved

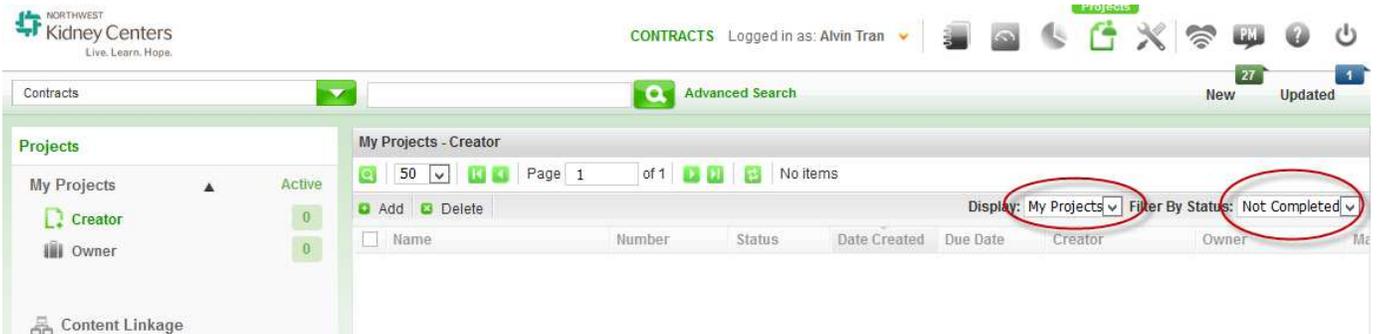
1. Log in with the same credentials you use to log in to your computer.
2. Select Contracts from the drop down menu on the left that says Policies and Procedures.



3. Select Projects from the menu – (note your screen will not have all of the icons shown)



4. The following screen opens



This screen defaults to “My Projects” (those for which you are the creator, owner, or manager) and projects that are “Not Completed”. You may change those choices via the drop down arrows.

Creator – the person who initiates the project

Owner – the person responsible for the content (the appropriate Vice President)

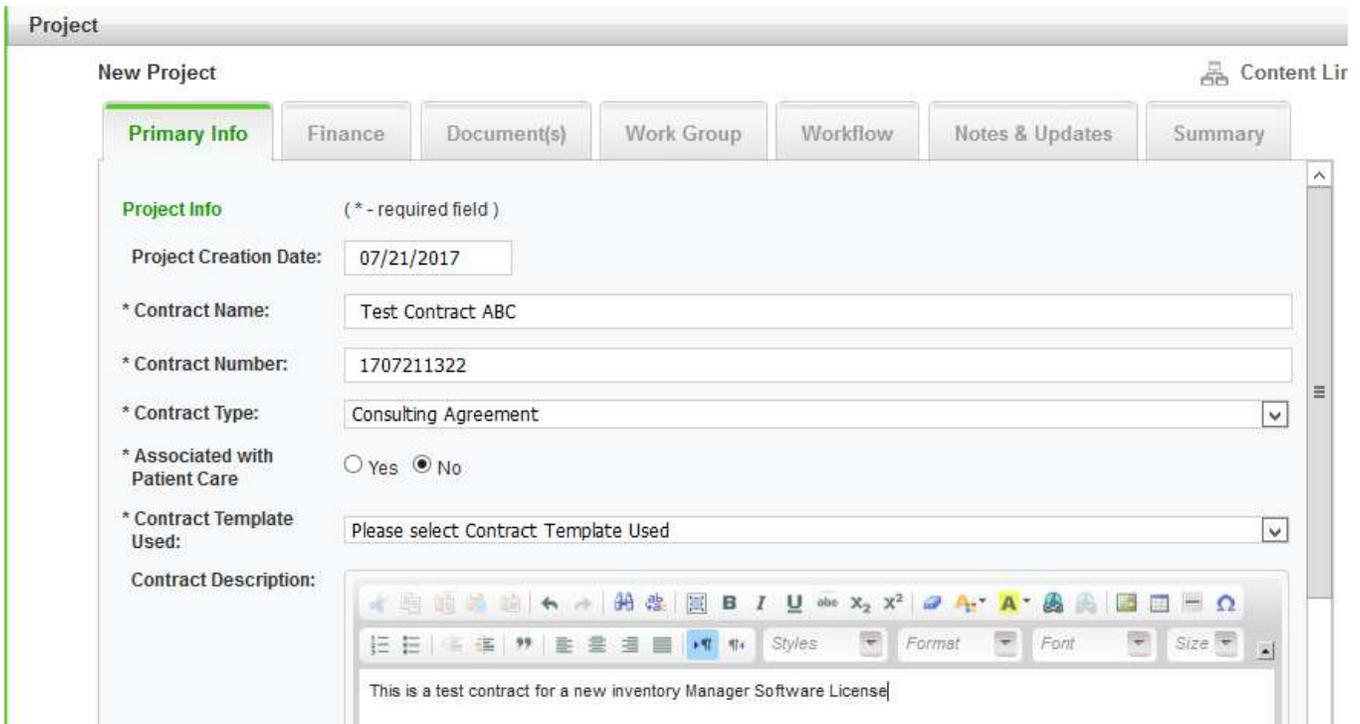
Manager – the person who ensures that documents are reviewed on time and all the information is accurate (typically the manager or director working on the contract)

These three roles do not need to be different people, although they may be. The creator, owner, and manager will receive email notifications as the project moves through the approval process and email links to any tasks they may need to complete.

5. Select Add from this screen



6. Now you will begin completing the required fields (indicated by “*”) on the *Primary Info tab* along with adding any other information that you wish to include about the contract.



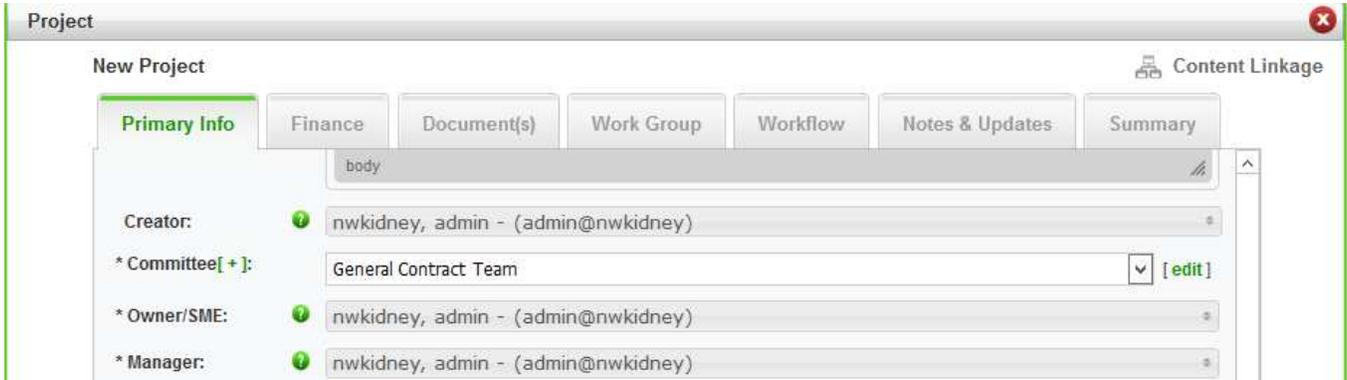
Contract Name: include the vendor name and date of the contract in the title – it will make searching much easier

Contract Number: use the date and time that you loaded the project into the system for the contract number (yymmddhhmm, for example, 1707211322 for a contract loaded on July 21, 2017 at 1:22 PM)

Contract Type: select a type from the drop down

Contract Template Used: most often we would use Vendor Contract Paper unless it is a contract that we have written

Contract Description – not required, but may be used to describe the contract contents



The Creator field automatically populates with your name.

Committee: Select the “General Contract Team”

Owner: Select the appropriate VP from the drop down list

Manager: Select a name from the drop down list, which will most likely be the same as the Creator.

7. Scroll down to find additional required fields.

Project

New Project Content Li

Primary Info Finance Document(s) Work Group Workflow Notes & Updates Summary

* Activation Options: Automatically after Project completion
 Manually by Activator after Project completion

* File Contract Under (Folder Location): Please select folder location to activate this contract under [+]
* Please select Destination

* Contract Access Rights: General Restricted

* Contract Document File Type: MS Word/Excel PDF/Scanned Images

* Contracting Organization: Site: Northwest Kidney Centers

* Contracting Organization as Vendor: Yes No

* Contracting With: Please type Company Name to select [add | edit]

Product/Services to be Provided:

Activation Option: Already set to “Automatically” – please leave that as is.

Please select folder location to activate this contract under [+] – click on the + sign

* File Contract Under (Folder Location): Please select folder location to activate this contract under [-]

- Northwest Kidney Centers
 - Administration
 - Administrative Operations
 - Chronic Kidney Disease
 - Clinical Operations

Select the folder you want the contract to be placed in. The folder choices are shown below:

- ▲  Northwest Kidney Centers
 -  Administration
 - ▲  Administrative Operations
 - ▷  CAHPS
 - ▷  Community Relations
 - ▷  Hospital Services
 - ▷  Nutrition and Fitness Services Affiliations
 - ▷  Pharmacy
 - ▷  Social Services
 -  Chronic Kidney Disease
 - ▲  Clinical Operations
 - ▷  Affiliation Agreements
 - ▷  Home Programs
 - ▷  Nursing Home Agreements
 - ▷  Other Clinical Operations
 - ▷  Technical Services
 - ▲  Development
 - ▷  Consultants
 - ▷  Events
 - ▷  Sponsorships
 -  Facilities
 - ▲  Finance
 - ▷  Accounting
 - ▲  Billing
 - ▷  KDP
 - ▷  Provider
 - ▷  Payor Agreements
 - ▷  Purchasing
 - ▲  HR
 - ▲  Health Benefits
 - ▷  Compass
 - ▷  Dental
 - ▷  Health
 - ▷  LifeAD&D
 - ▷  Vision
 -  Other Human Resources
 - ▲  Training
 - ▷  e Learning
 - ▷  TravelersTemp Agencies
 - ▲  Information Services
 - ▷  LicensesMaintenance
 - ▷  Operations Support Services
 - ▷  Professional Services
 -  KRI
 -  Planning
 -  Public Relations
 -  Strategic

* Contract Access Rights: General Restricted

* Contract Document File Type: MS Word/Excel PDF/Scanned Images

* Contracting Organization: Site: Northwest Kidney Centers

* Contracting Organization as Vendor: Yes No

* Contracting With: [add | edit]

Product/Services to be Provided:



Contract Access Rights: Do not change the access rights. Access to the contracts is restricted by folders; e.g., the folders under Development may be accessed by Sr. Leadership, Admin support, and the Development Manager.

Custom Meta Data: Please leave blank

Contract document file type: Select the file type of the contract document

Contracting organization: check the box for Northwest Kidney Centers

Contracting organization as vendor: this can be left as “No”

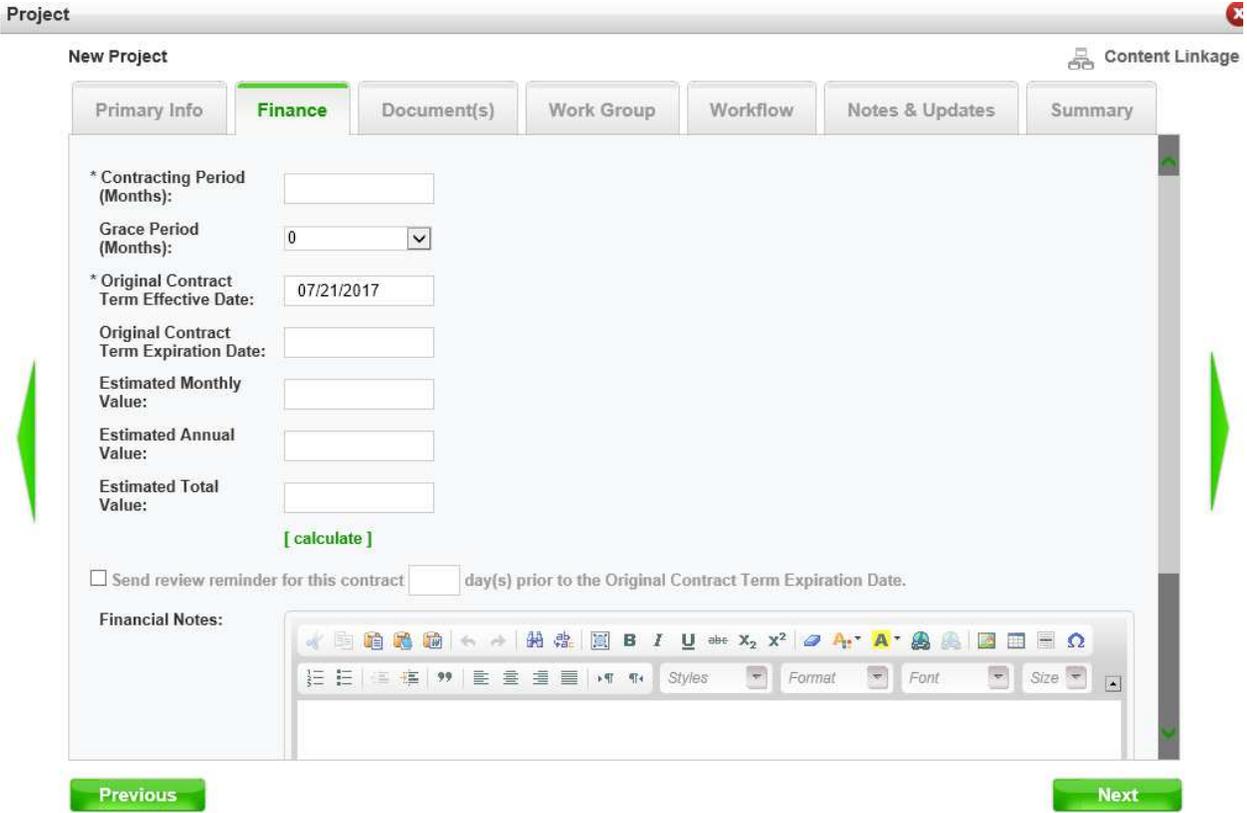
Contracting With: If this is a new vendor select “add”, otherwise type the first three letters of the vendor name and then select from the pop up window that appears

Product/Services to be Provided: this can be left blank

Product/Services Notes/Comments: this can be left blank

8. When the required fields have been completed, select “Next” at the bottom of the page.

9. Now the *Finance Tab* is open.



Project

New Project Content Linkage

Primary Info **Finance** Document(s) Work Group Workflow Notes & Updates Summary

* Contracting Period (Months):

Grace Period (Months): ▼

* Original Contract Term Effective Date:

Original Contract Term Expiration Date:

Estimated Monthly Value:

Estimated Annual Value:

Estimated Total Value:

[calculate]

Send review reminder for this contract day(s) prior to the Original Contract Term Expiration Date.

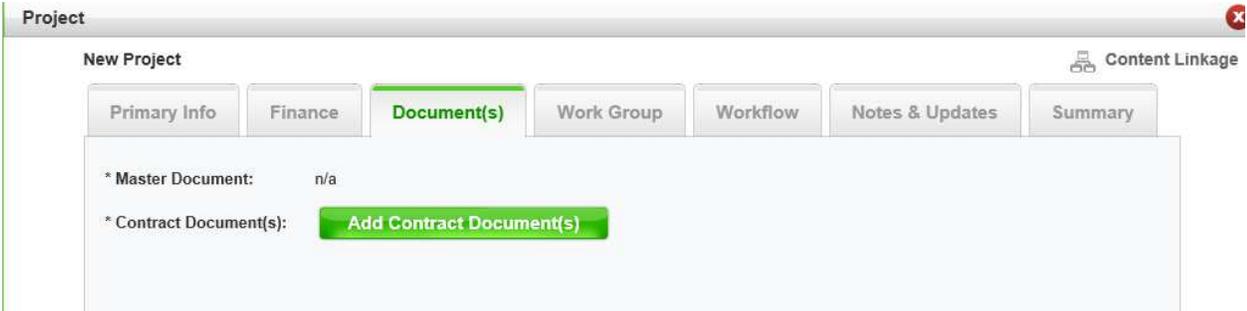
Financial Notes:

Previous Next

The two required fields on this screen are the Contracting Period (months), and the original term effective date. If there are additional comments that you want to make about the financial aspects of the contract, use the “Financial Notes” section at the bottom of the tab.

10. When the required fields have been completed, select “Next”.

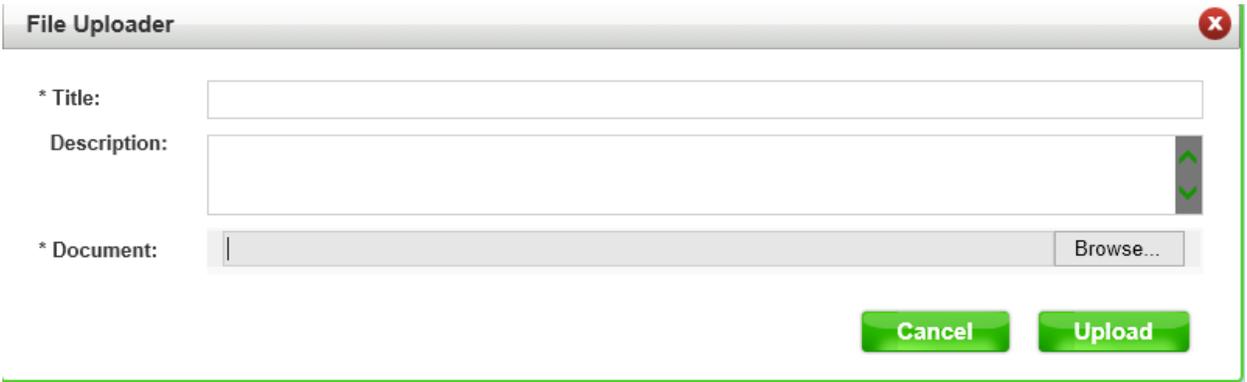
11. The *Document Tab* appears



The screenshot shows a window titled "Project" with a close button in the top right corner. Below the title bar is a "New Project" section with a "Content Linkage" icon and label. A row of tabs is visible: "Primary Info", "Finance", "Document(s)", "Work Group", "Workflow", "Notes & Updates", and "Summary". The "Document(s)" tab is highlighted with a green border. Below the tabs, the text "* Master Document: n/a" is displayed. Underneath, the text "* Contract Document(s):" is followed by a green button labeled "Add Contract Document(s)".

12. Select Upload Master Document.

The file uploader appears:

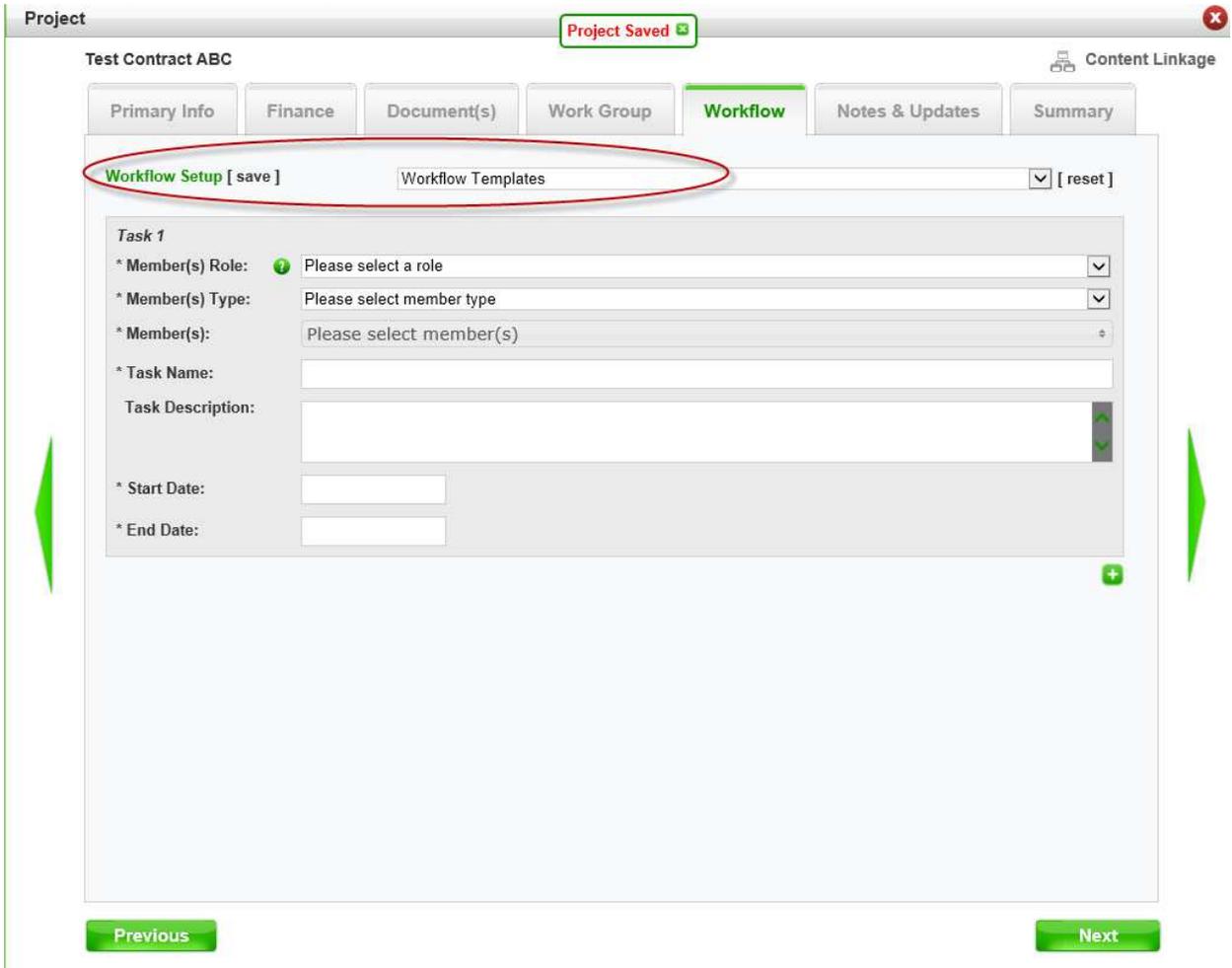


The screenshot shows a "File Uploader" dialog box with a close button in the top right corner. It contains three input fields: "* Title:" with an empty text box; "Description:" with a larger text area and a vertical scrollbar on the right; and "* Document:" with an empty text box and a "Browse..." button to its right. At the bottom right of the dialog are two green buttons: "Cancel" and "Upload".

Give the contract document a Title (required), add a "Description", and use "Browse" to select the document from your files. Then select "Upload". Any additional documents, for example, a signed purchase request, may be similarly added by selecting the add contract attachments button. If the purchase request is required, it should be approved prior to loading a contract into the system.

13. When all of the relevant documents have been uploaded, select "Next".

14. Skip the Work Group tab, and move to the *Workflow tab*.



Project Project Saved

Test Contract ABC Content Linkage

Primary Info Finance Document(s) Work Group **Workflow** Notes & Updates Summary

Workflow Setup [save] Workflow Templates [reset]

Task 1

* Member(s) Role:

* Member(s) Type:

* Member(s):

* Task Name:

Task Description:

* Start Date:

* End Date:

Previous Next

Go to the drop down list for “Workflow Setup”. Select the “NKC Standard Workflow”.

A pop up box appears that says the template will replace your workflow set up - select “OK”.

This will then populate the workflow with Chris’s and Carrie’s names so that your contract will route to them for approval.

Project Content Linkage

New Project

Primary Info Finance Document(s) Work Group **Workflow** Notes & Updates Summary

Workflow Setup [save] NKC Standard Workflow [reset]

Task 1

* Member(s) Role: Approver

* Member(s) Type: Committee Member

* Member(s): Matala, Chris - (Cm9391@nwkidney)

* Task Name: approve first draft

Task Description:

* Start Date:

* End Date:

Task 2

* Member(s) Role: Approver

* Member(s) Type: Committee Member

* Member(s): McCabe, Carrie - (cm9150@nwkidney)

* Task Name: approve the contract

Task Description:

* Start Date:

* End Date:

Task 3

* Member(s) Role: Reviewer

* Member(s) Type: Committee Member

* Member(s): Benn, Catherine - (cb8636@nwkidney) | Rizzo, Michelle - (mr9144@nwkidney)

* Task Name: Completion

Task Description: Obtain the fully executed version and upload into the system

* Start Date:

* End Date:

Previous Next

15. You will need to enter the start date and end date for each of the reviewers.
16. When the required fields have been completed, select "Next".
17. You may use the Notes and Updates tab if you wish – no fields are required.

18. The *Summary tab* provides a quick look at everything you've entered. From here you may Save and Start Project, which will route the contract to Chris, or Save as Draft if you haven't finished

Project




New Project

 Content Linkage

Primary Info

Finance

Document(s)

Work Group

Workflow

Notes & Updates

Summary

Project Review

Primary Info

Project Creation Date:	07/21/2017
Contract Name:	Test Contract ABC
Contract Number:	1234
Contract Type:	Consulting Agreement
Contract Template Used:	Vendor Contract Paper
Contract Description:	
Creator:	Tran, Alvin - (ht8635@nwkidney)
Committee:	General Contract Team
Owner/SME:	Tran, Alvin - (ht8635@nwkidney)
Manager:	Tran, Alvin - (ht8635@nwkidney)
Activation Options:	Automatically after Project completion
Folder Location:	/Northwest Kidney Centers/Information Services/Professional Services <input checked="" type="checkbox"/> Restricted Access
Access Rights:	Restricted

Contract Document File Type:	PDF/Scanned Images
Contracting Organization:	/Site: Northwest Kidney Centers/Department: Information Technology
Contracting Organization as Vendor:	No
Contracting With:	Synovate, Inc. dba Ipsos Public Affairs
Product/Services to be Provided:	
Product/Services Notes/Comments:	

Finance

Contracting Period:	12
Grace Period:	0
Original Contract Term Effective Date:	07/21/2017
Original Contract Term Expiration Date:	07/21/2018
Estimated Monthly Value:	
Estimated Annual Value:	
Estimated Total Value:	
Financial Notes:	

Purchase Order (PO):

Work Group

Responsible Party(s):

Vendor/Other Party(s):

Workflow

Task #	Role	Type	Member	Task	Start Date	End Date	Signature
1.	Approver	Committee Member	Matala, Chris - (Cm9391@nwkidney)	approve first draft	07/21/2017	07/24/2017	no
2.	Approver	Committee Member	McCabe, Carrie - (cm9150@nwkidney)	approve the contract	07/25/2017	07/25/2017	no
3.	Reviewer	Committee Member	Benn, Catherine - (cb8636@nwkidney) Rizzo, Michelle - (mr9144@nwkidney)	Completion	07/25/2017	07/28/2017	no

Previous

Close

Delete

Save Project as Draft

Save & Start Project

Contract Review by Approvers

After submitting the contract of review the creator, owner, and manager will receive email updates of the progress. The first email will be acknowledgement of the contract being submitted. Subsequent emails will be of approval/denial of the contract by approvers and completion processes. Read each email to confirm whether or not you need to take further action.

Contracts folders and permissions

Senior leadership and the administrative staff have permissions to view the contents of all folders. See below for folders with additional individuals who have access.

Northwest Kidney Centers

Administration	
Administrative Operations	
CAHPS	Louise Kato
Community Relations	Syrenka Slettebak
Hospital Services	Melina Randall
Nutrition and Fitness Services Affiliations	Katy Wilkens
Pharmacy	Tom Montemayor
Social Services	Louise Kato
Chronic Kidney Disease	Laura Brock
Clinical Operations	
Affiliation Agreements	
Home Programs	Gerry Morrison, Janice Omri Alice Chamberlin, Patsy Knight
Nursing Home Agreements	
Other Clinical Operations	
Technical Services	Scott Hansen
Development	Tim Heimerle, Larry Richards
Facilities	Randy Thompson, Steve Matz
Finance	
HR	Betsy Mickel, Denise Matz
Information Services	Andy Voorhies, Ashok Varma, Karen Pemble
KRI	
Planning	
Public Relations	Linda Sellers
Strategic	

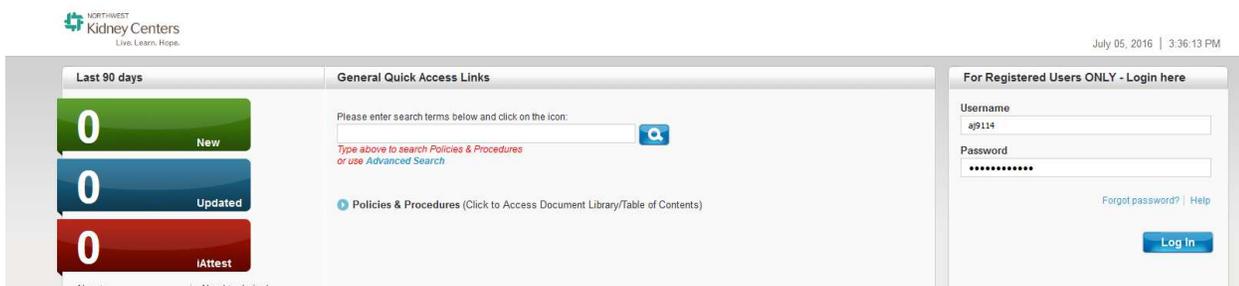
Part Two

Finding a Contract

Access to the contracts manager folders is restricted by department or area. You may be unable to view the contracts in a certain folder if you do not have the appropriate viewing privileges. If you encounter this issue, please contact the NKC helpline.

The contracts manager URL: <https://nwkidney.policymedical.net>

1. The following screen appears when you go to the contract manager URL. Enter the credentials that you use to log into your computer.



2. When you login, the application defaults to Policies and Procedures. Use the drop down arrow on the left of the page to select contracts.

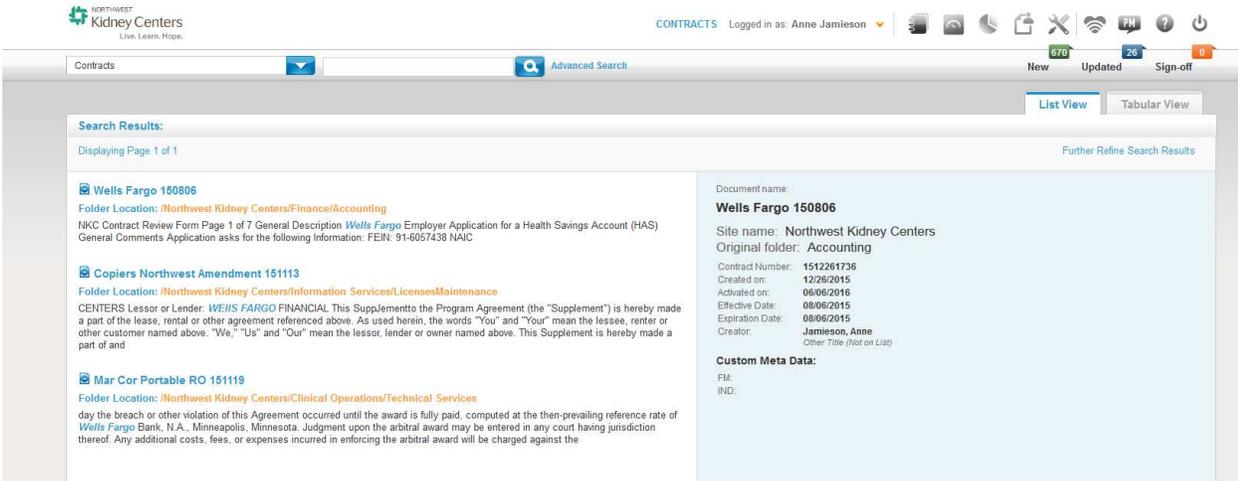


3. Now you're in the Contracts Manager application. Use the search function to locate the contract in which you are interested. In the example below, the search term is Wells Fargo.

Advanced Search: Use this to refine your search if too many results are returned



- The search results are displayed below. In addition to the contract name, the search function also returns the folder location. If you hover over the contract name, you will see the contract metadata on the right-hand side of the screen.



Search Results:
Displaying Page 1 of 1

Wells Fargo 150806
Folder Location: Northwest Kidney Centers/Finance/Accounting
NKC Contract Review Form Page 1 of 7 General Description Wells Fargo Employer Application for a Health Savings Account (HAS) General Comments Application asks for the following information: FEIN: 91-6057438 NAIC

Copiers Northwest Amendment 151113
Folder Location: Northwest Kidney Centers/Information Services/Licenses/Maintenance
CENTERS Lessor or Lender: WELLS FARGO FINANCIAL. This Supplement to the Program Agreement (the "Supplement") is hereby made a part of the lease, rental or other agreement referenced above. As used herein, the words "You" and "Your" mean the lessee, renter or other customer named above. "We," "Us" and "Our" mean the lessor, lender or owner named above. This Supplement is hereby made a part of and

Mar Cor Portable RO 151119
Folder Location: Northwest Kidney Centers/Clinical Operations/Technical Services
day the breach or other violation of this Agreement occurred until the award is fully paid, computed at the then-prevailing reference rate of Wells Fargo Bank, N.A., Minneapolis, Minnesota. Judgment upon the arbitral award may be entered in any court having jurisdiction thereof. Any additional costs, fees, or expenses incurred in enforcing the arbitral award will be charged against the

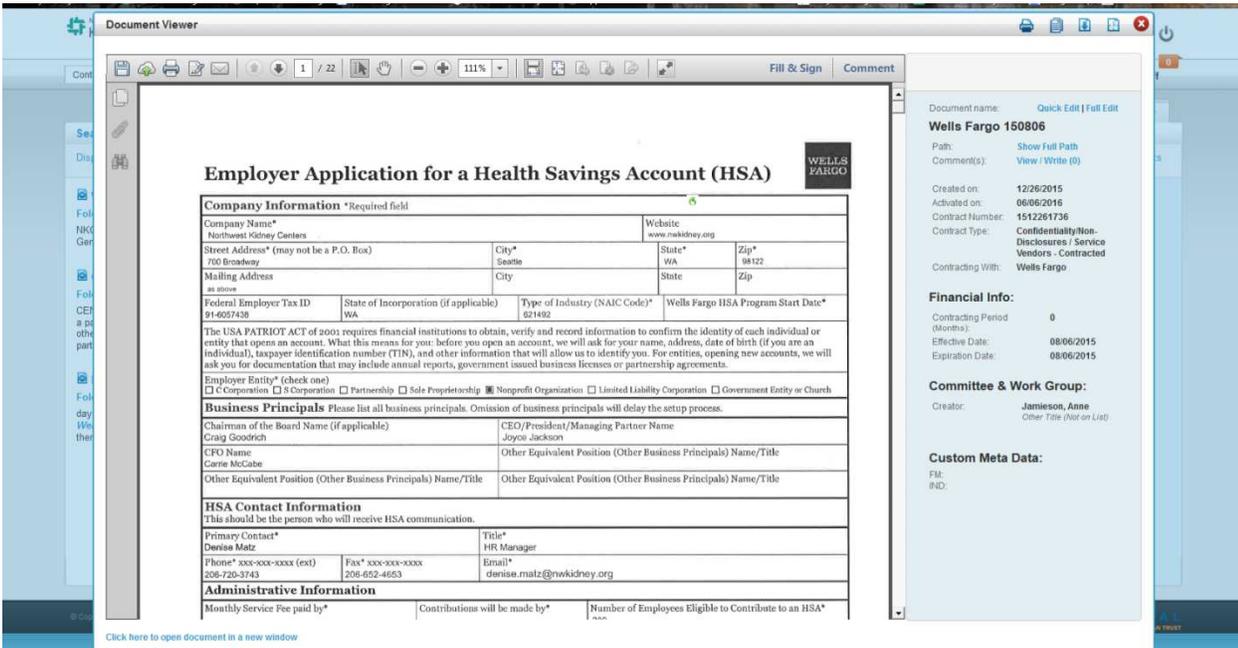
Document name:
Wells Fargo 150806

Site name: Northwest Kidney Centers
Original folder: Accounting

Contract Number: 1512261736
Created on: 12/26/2015
Activated on: 06/06/2016
Effective Date: 08/06/2015
Expiration Date: 08/06/2015
Creator: Jamieson, Anne
Other Title (Not on List)

Custom Meta Data:
FM:
IND:

- Clicking on the contract name will pull up the contract in Document Viewer. This view displays the contract or document along with associated metadata.



Employer Application for a Health Savings Account (HSA)

Company Information *Required field

Company Name*		Website	
Northwest Kidney Centers		www.nwkidney.org	
Street Address* (may not be a P.O. Box)	City*	State*	Zip*
700 Broadway	Seattle	WA	98122
Mailing Address	City	State	Zip
as above			
Federal Employer Tax ID	State of Incorporation (if applicable)	Type of Industry (NAIC Code)*	Wells Fargo HSA Program Start Date*
91-6057438	WA	821492	

The USA PATRIOT ACT of 2001 requires financial institutions to obtain, verify and record information to confirm the identity of each individual or entity that opens an account. What this means for you: before you open an account, we will ask for your name, address, date of birth (if you are an individual), taxpayer identification number (TIN), and other information that will allow us to identify you. For entities, opening new accounts, we will ask you for documentation that may include annual reports, government issued business licenses or partnership agreements.

Employer Entity* (check one)
 C Corporation S Corporation Partnership Sole Proprietorship Nongovernmental Organization Limited Liability Corporation Government Entity or Church

Business Principals Please list all business principals. Omission of business principals will delay the setup process.

Chairman of the Board Name (if applicable)	CEO/President/Managing Partner Name
Craig Goodrich	Joyce Jackson
CFD Name	Other Equivalent Position (Other Business Principals) Name/Title
Cerrie McCabe	
Other Equivalent Position (Other Business Principals) Name/Title	Other Equivalent Position (Other Business Principals) Name/Title

HSA Contact Information
This should be the person who will receive HSA communication.

Primary Contact*	Title*
Denise Matz	HR Manager
Phone* xxx-xxx-xxxx (ext)	Fax* xxx-xxx-xxxx
206-726-3743	206-852-4653
Email*	
denise.matz@nwkidney.org	

Administrative Information

Monthly Service Fee paid by*	Contributions will be made by*	Number of Employees Eligible to Contribute to an HSA*

Document name: Quick Edit | Full Edit
Wells Fargo 150806

Path: Show Full Path
Comment(s): View | Write (0)

Created on: 12/26/2015
Activated on: 06/06/2016
Contract Number: 1512261736
Contract Type: Confidentiality/Non-Disclosures / Service Vendors - Contracted
Contracting With: Wells Fargo

Financial Info:
Contracting Period (Months): 0
Effective Date: 08/06/2015
Expiration Date: 08/06/2015

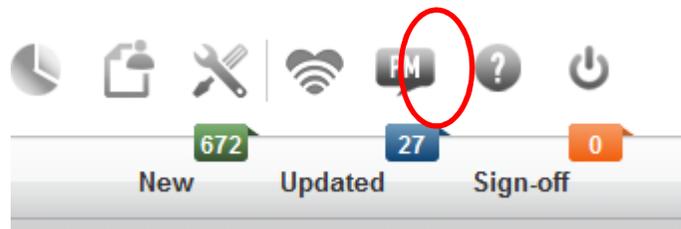
Committee & Work Group:
Creator: Jamieson, Anne
Other Title (Not on List)

Custom Meta Data:
FM:
IND:

Part Three

Getting Assistance

1. Help is available from two sources. First, from within the Contracts Manager application and second, from the NKC helpline.
2. In the upper right of the Contracts Manager application you will see a question mark icon.



3. Select Support Portal from the pop up box.



4. From the Support Portal you may choose to submit a ticket, check on ticket status, or use the materials available from the knowledge base.
5. Any ticket you submit directly to Policy Medical goes directly to them and our NKC Helpline will **not** know anything about the ticket so you will be managing the progress of the ticket yourself.
6. When in doubt about submitting a ticket use NKC Helpline.


Anne Jamieson

Home
Tickets

SEARCH

[Submit a new ticket](#)
[Check ticket status](#)
[Urgent Support - 1-888-697-6331 x1](#)

Knowledge base

General

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- [How long do new policies stay listed in the new policy section o...](#)
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- [Step-by-step Guide: Attestations](#)
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