NORTHWEST
Kidney Centers
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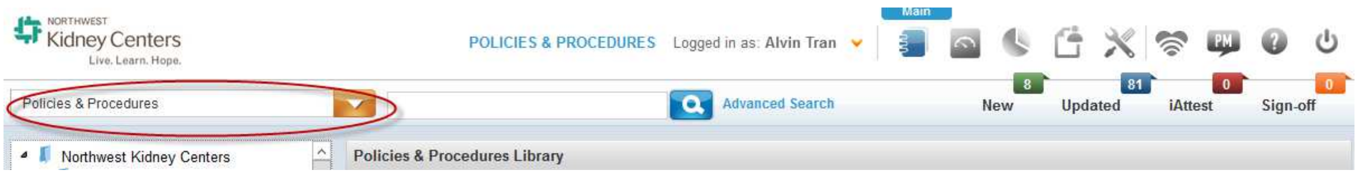
Quick Reference for Contracts Manager

Go to: nwkidney.policymedical.net

Part One

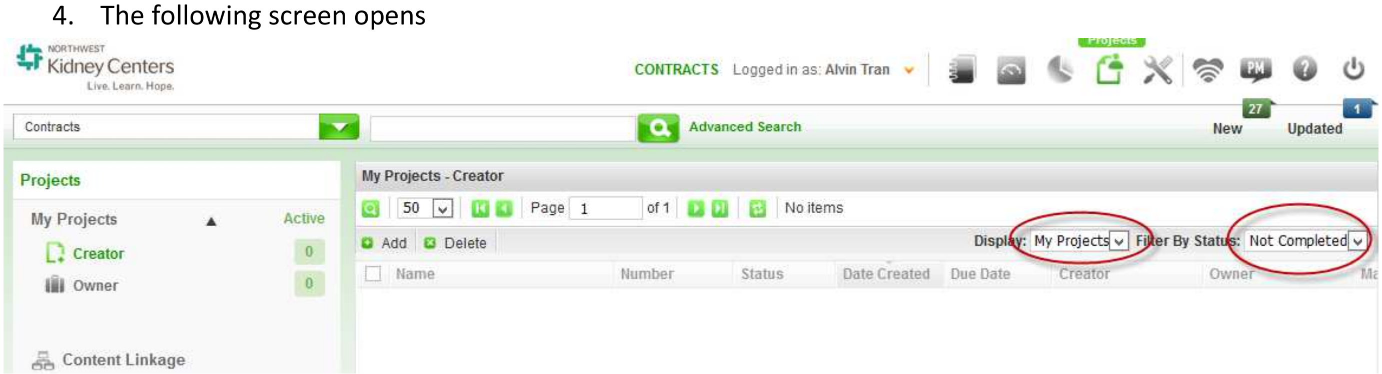
How to get a contract approved

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

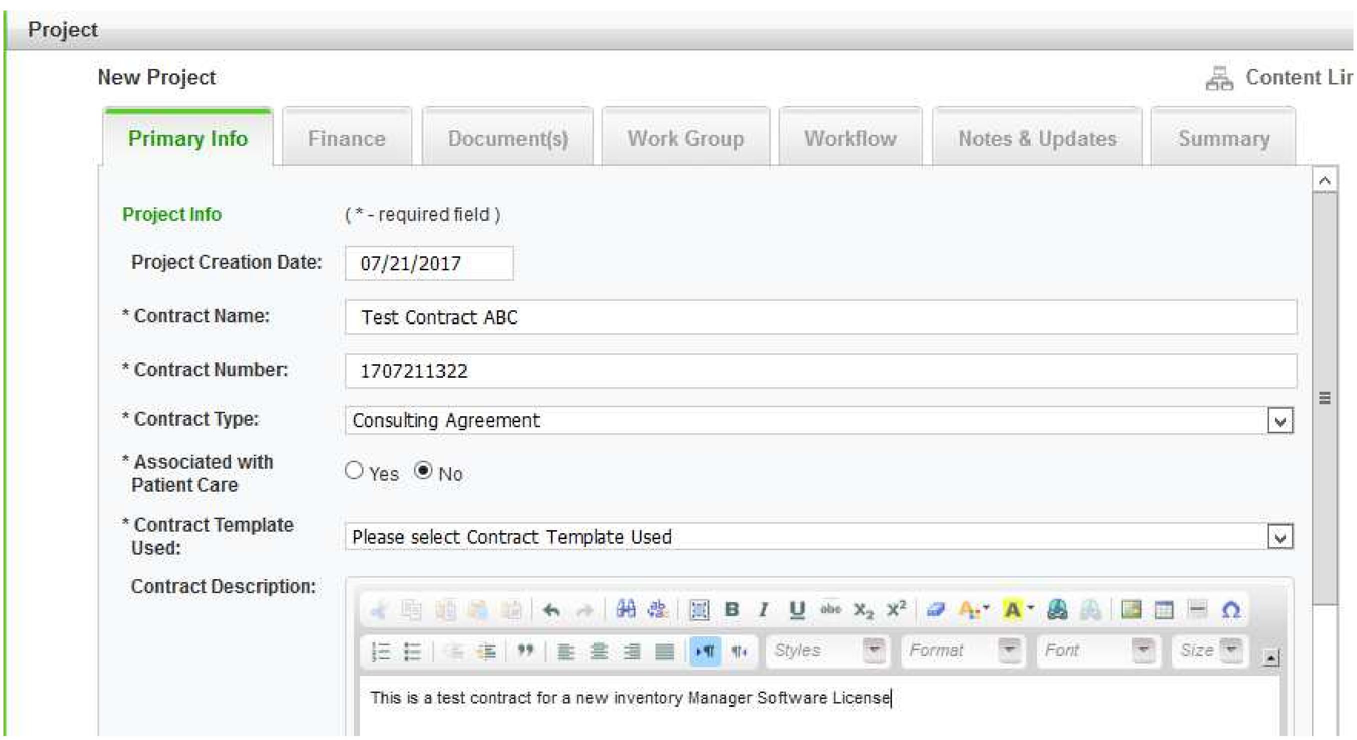
Owner – the person responsible for the content (the appropriate Vice President)

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.



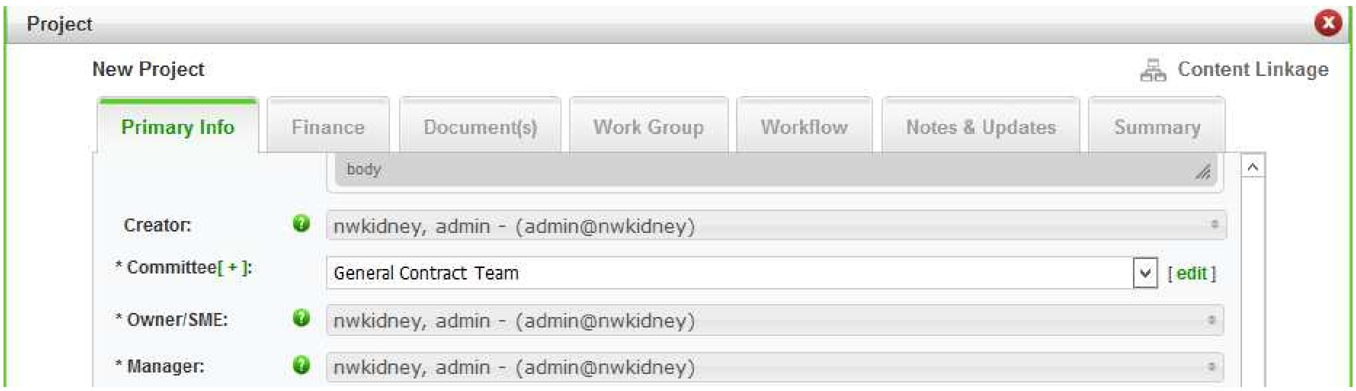
Contract Name: include the vendor name and date of the contract in the title – it will make searching much easier

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

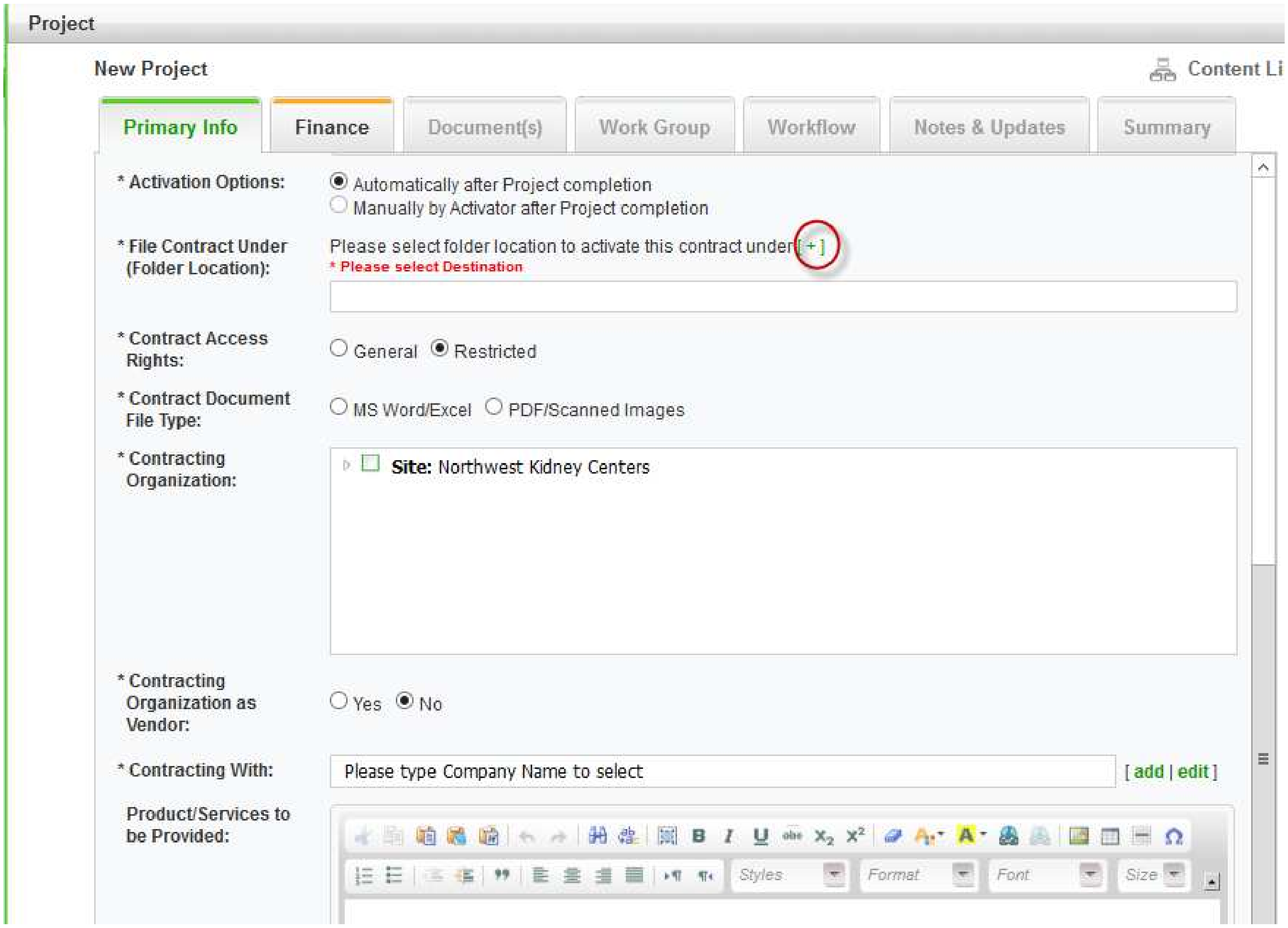


The Creator field automatically populates with your name.
Committee: Select the "General Contract Team"

Owner: Select the appropriate VP from the drop down list

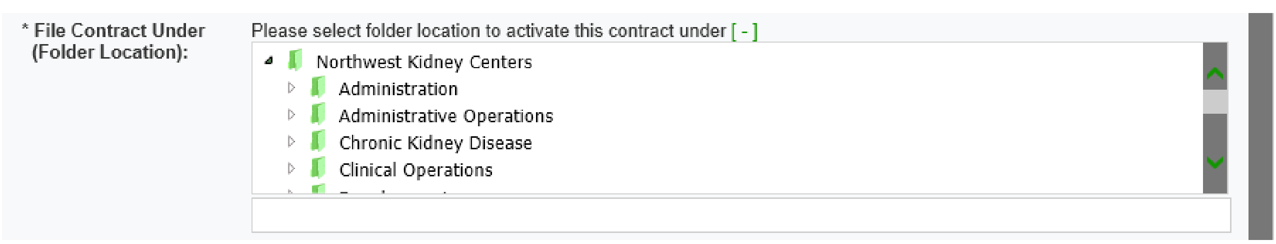
Manager: Select a name from the drop down list, which will most likely be the same as the Creator.

7. Scroll down to find additional required fields.



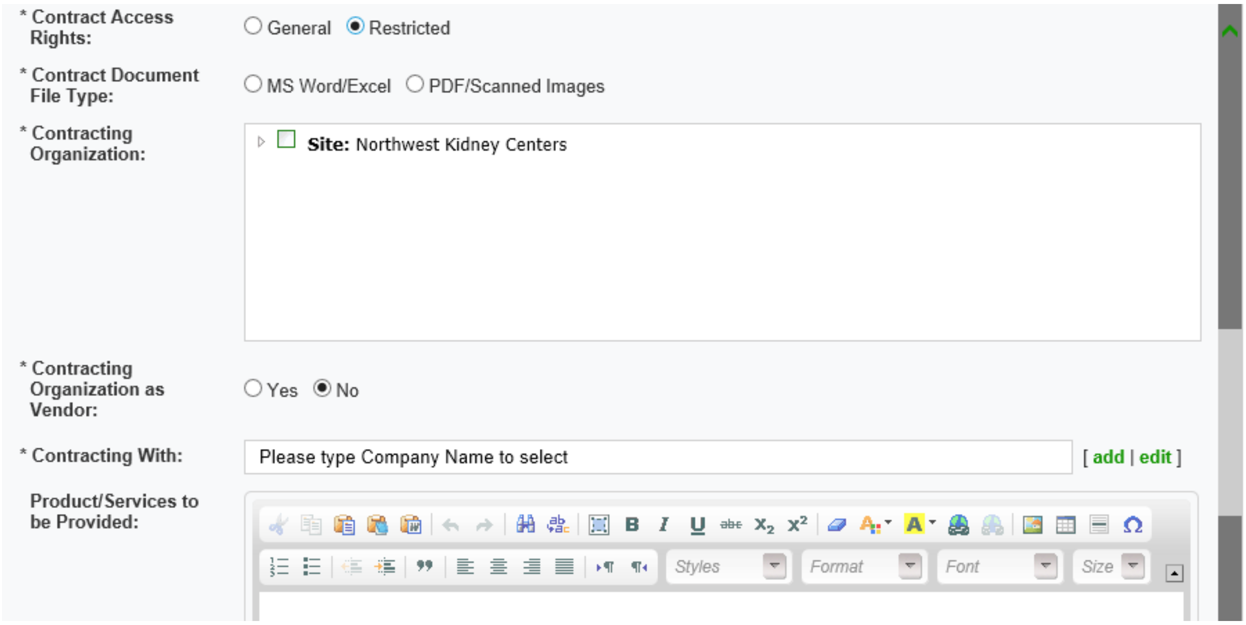
Activation Option: Already set to "Automatically" – please leave that as is.

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



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: 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"

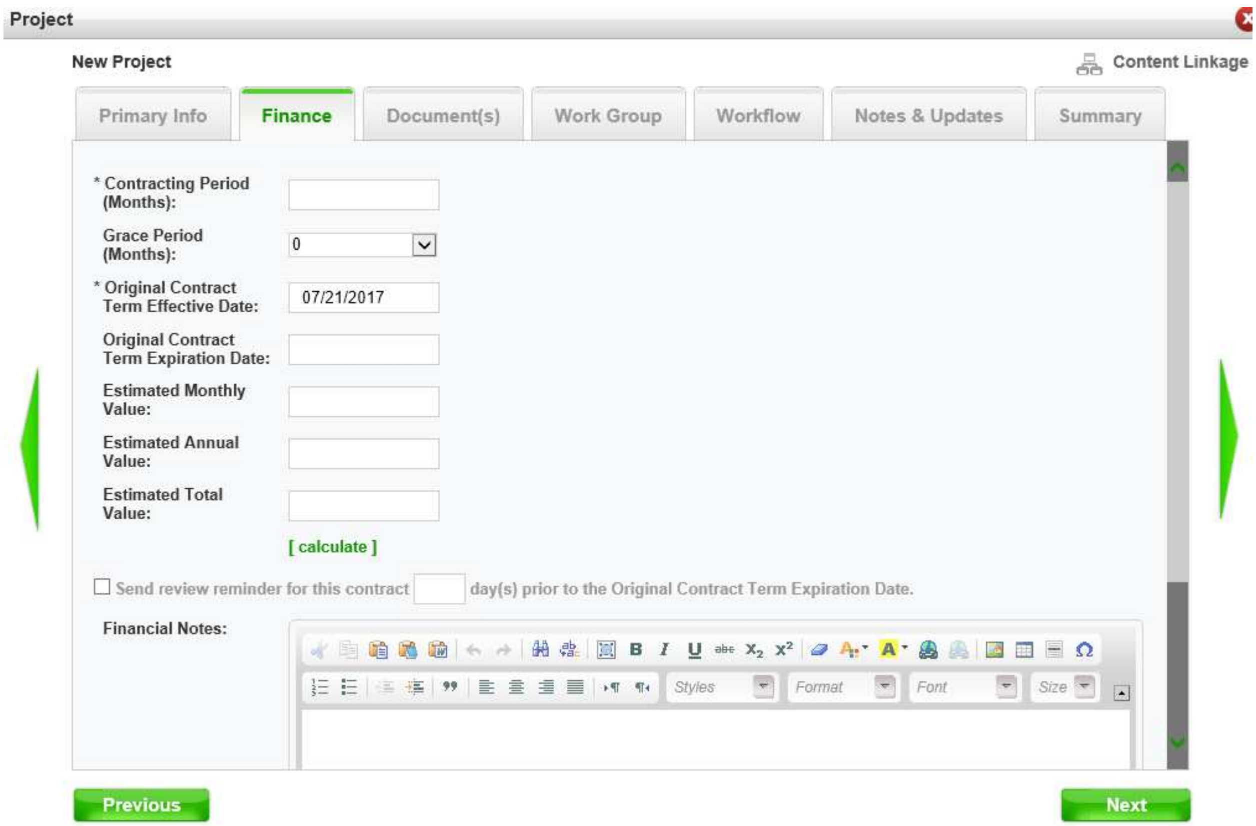
Contracting With: If this is a new vendor select "add", otherwise type the first three letters of the vendor name and then select from the pop up window that appears

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.

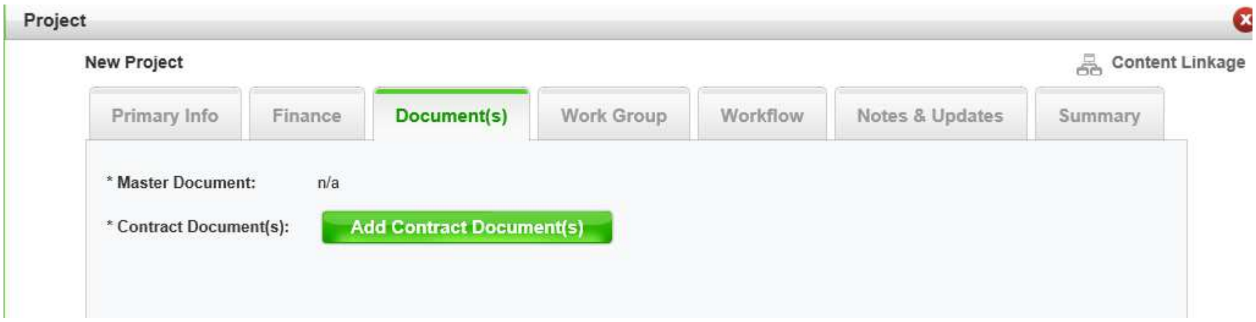
9. Now the ***Finance Tab*** is open.



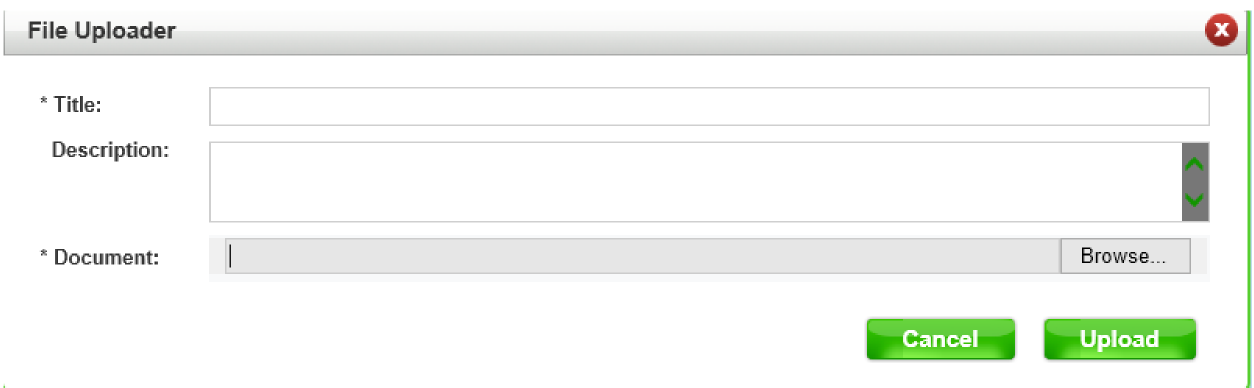
The two required fields on this screen are the Contracting Period (months), and the original term effective date. If there are additional comments that you want to make about the financial aspects of the contract, use the "Financial Notes" section at the bottom of the tab.

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

11. The ***Document Tab*** appears



12. Select Upload Master Document.
    The file uploader appears:



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”.

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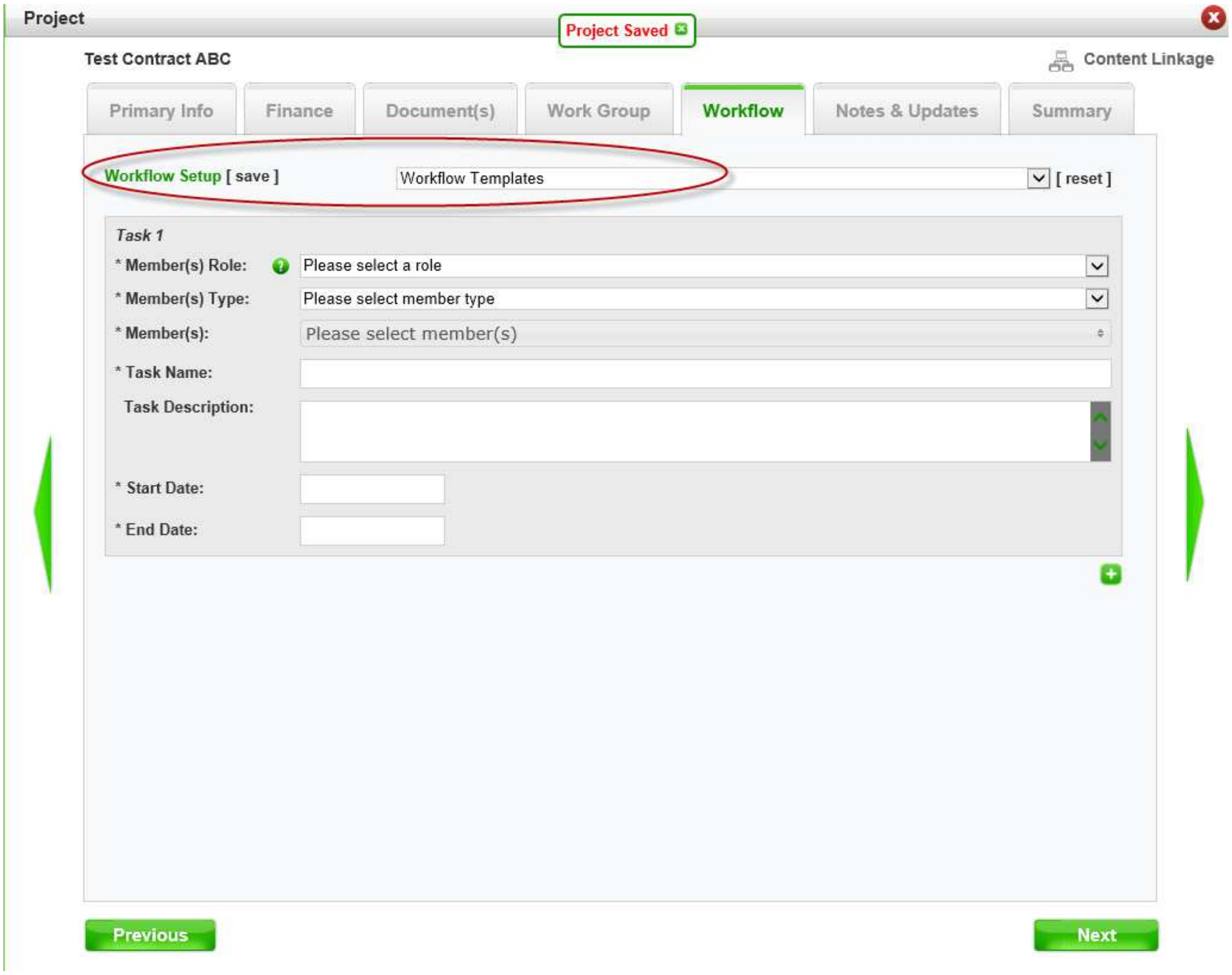
14. Skip the Work Group tab, and move to the ***Workflow tab***.



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.

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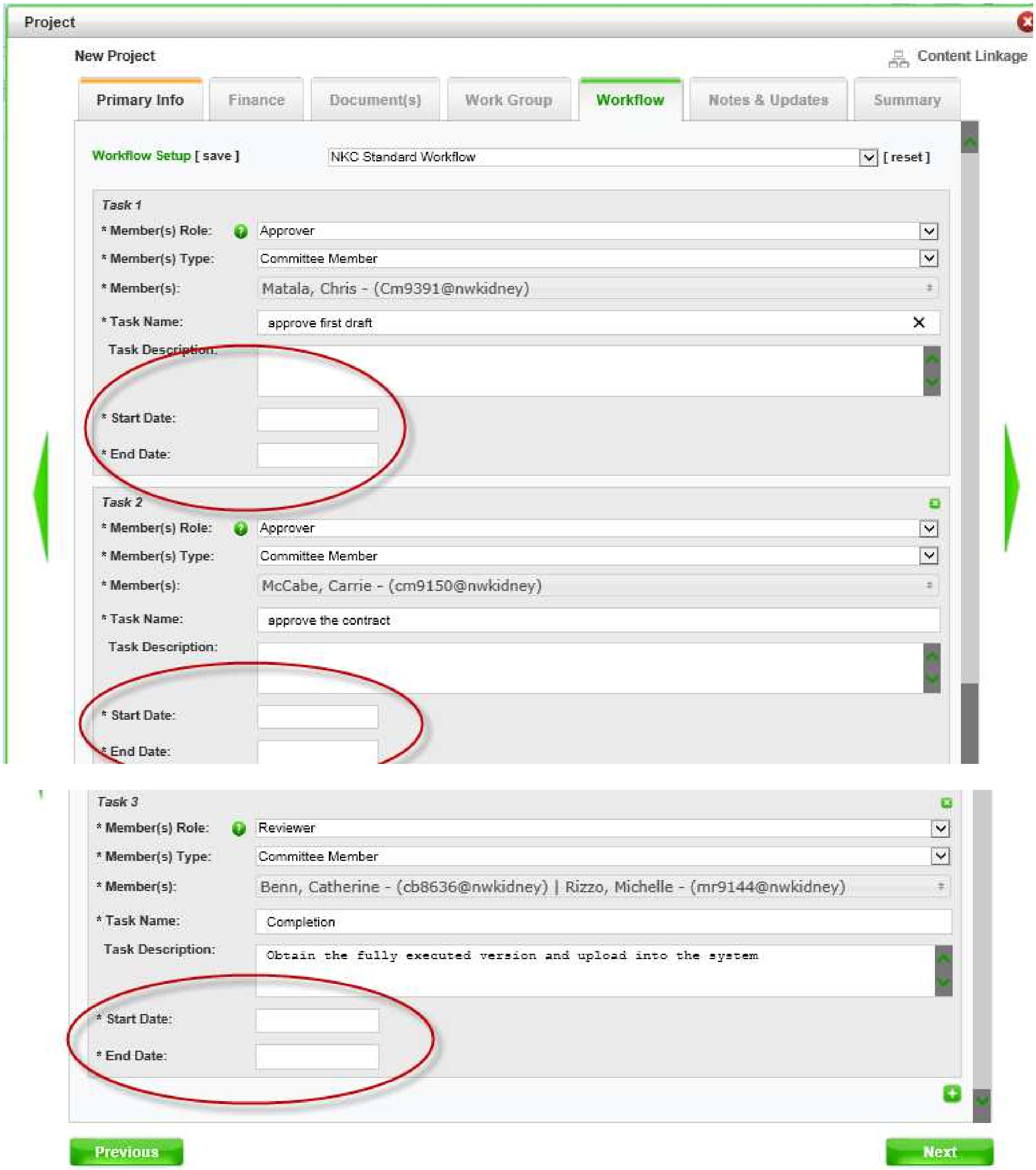

15. You will need to enter the start date and end date for each of the reviewers.
16. When the required fields have been completed, select “Next”.
17. You may use the Notes and Updates tab if you wish – no fields are required.

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

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Project

New Project

Content Linkage

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

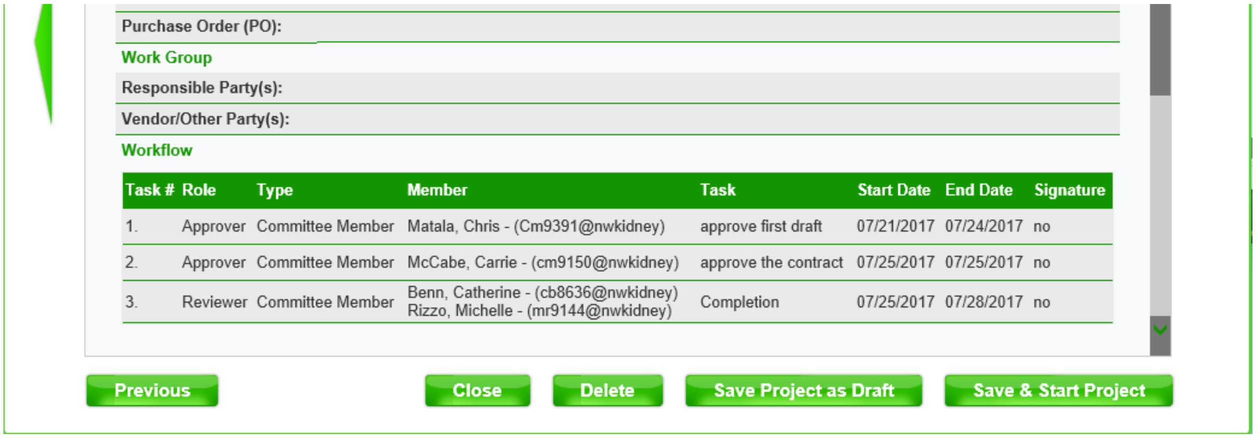
Project Review

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 ☒ 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	

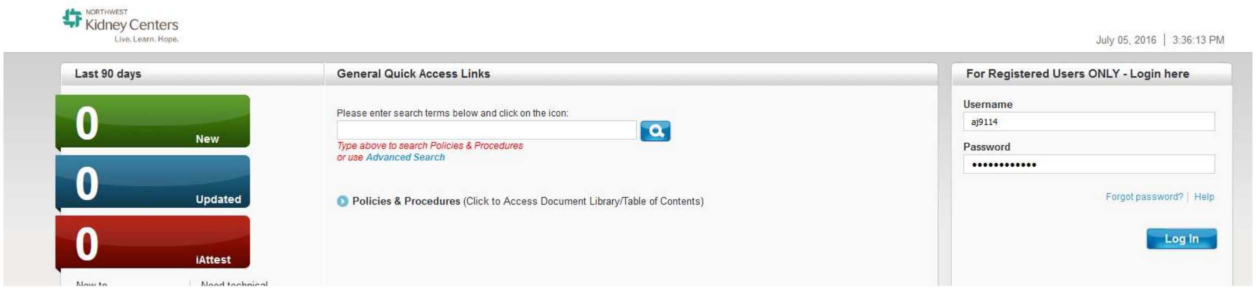
Part Two

Finding a Contract

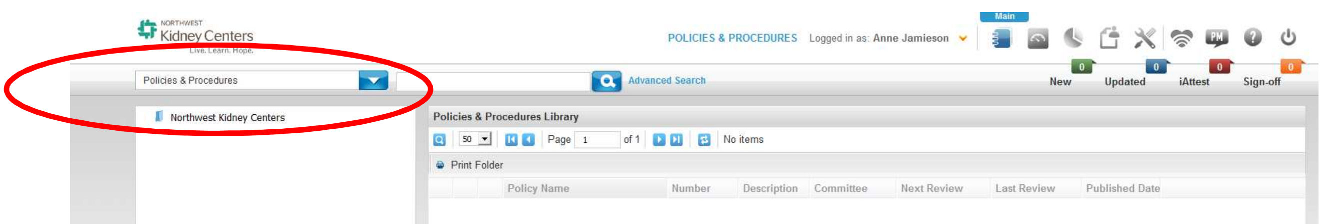
Access to the contracts manager folders is restricted by department or area. You may be unable to view the contracts in a certain folder if you do not have the appropriate viewing privileges. If you encounter this issue, please contact the NKC helpline.

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.



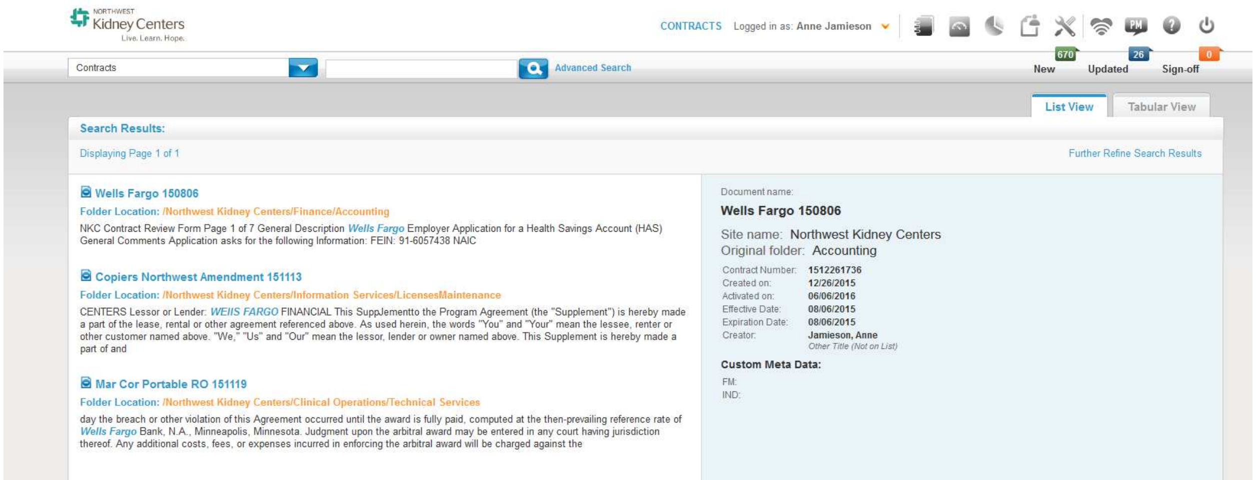
2. When you login, the application defaults to Policies and Procedures. Use the drop down arrow on the left of the page to select contracts.



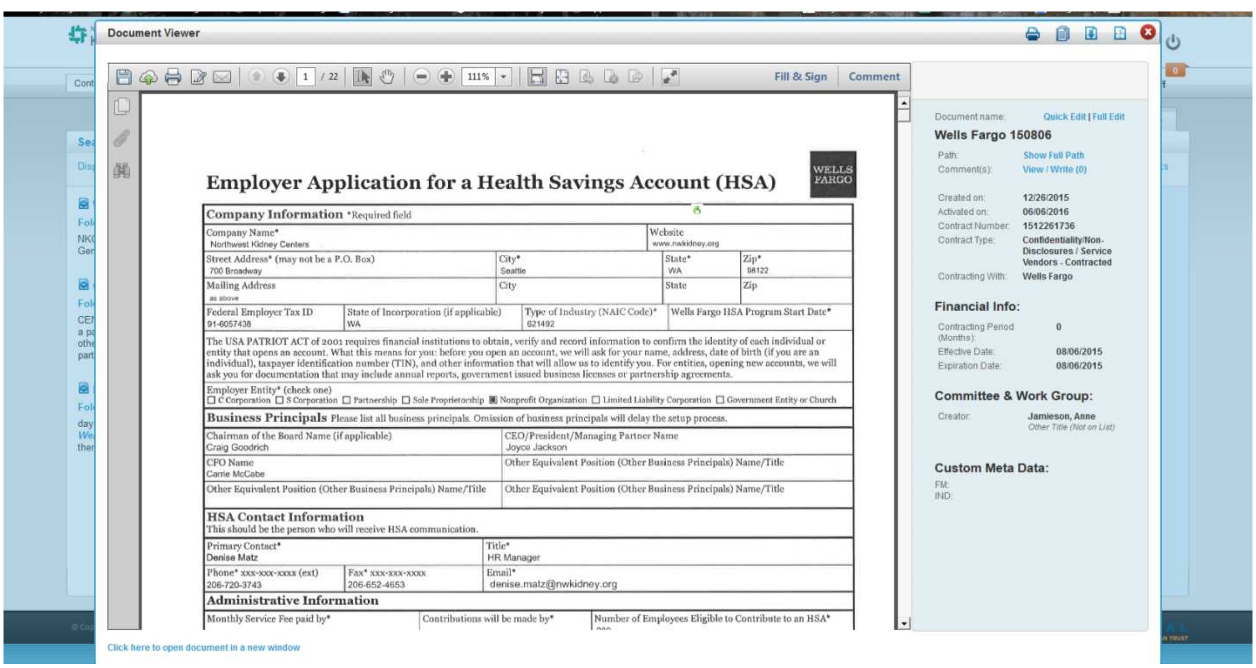
3. Now you're in the Contracts Manager application. Use the search function to locate the contract in which you are interested. In the example below, the search term is Wells Fargo.

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

4. 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.



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

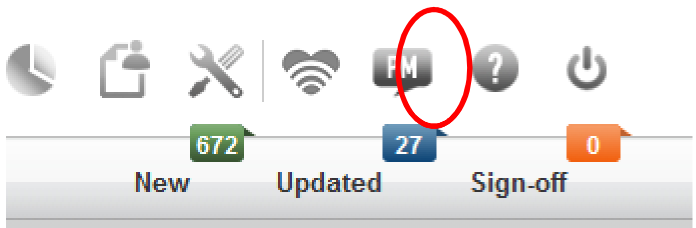


Part Three

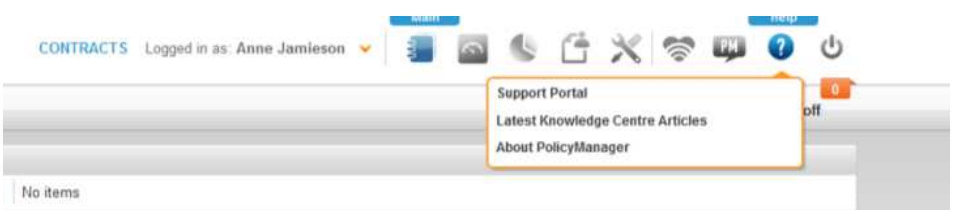
Getting Assistance

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.