

Hello,

Exciting news from Health Procurement-Contracting

We have been hard at work improving our contract management system, and we are excited for you to experience the new features. You may recall the original version launched in June 2019 as a replacement for MediTract, and you will see some of those changes when we launch the new version on Memorial Day Monday, May 25, 2020.

What does this mean for you?

We hope the updates will make it easier for you to track your pending requisitions (“Reqs”) and active contracts so you will know where they are in process and who to contact if you have questions.

We renamed the system

We renamed the system **ContractKing** – partly because it sounds cool but mostly so we can talk about the contract and procurement management system without calling it either “the contract and procurement management system,” because that’s quite a mouthful, or “the database,” because it’s much more than that. It’s a dynamic tool that will allow you to now “track” the progress of your Reqs, monitor your active contracts, and find your contracts. If you’re wondering why the “K” is capitalized, “K” is legal shorthand for contract (See our [Contracts 101](#)). And, someday, we’d like to be “King” of something pretty good.

Improved Requisition Management

If you submit Reqs, you have received emails from time to time with details of your active Reqs.

We have improved these reports so they will be automatically generated and, emailed twice a month, on the second and fourth Monday of every month.

Emailed Requisition Reports *(coming Fall 2020)*

The emails, sent from ContractKing@ucsf.edu, will include a Req Report in the form of a spreadsheet attachment that you can open in Microsoft Excel. This report will detail the status of all your open and recently completed Reqs.

ContractKing Requisition Dashboard

One exciting new feature is that the email will include a link to view a dashboard of your Reqs in ContractKing. When you follow the link, you will be directed to log into Salesforce using MyAccess SSO (single sign on) credentials. When you do, ContractKing will show you a list of all your Reqs and let you dig into the details of any of them. Alternatively, you can directly access your own Req listview in ContractKing at <https://ucsf.lightning.force.com/lightning/o/Contract/list?filterName=00B2K0000095QRoUAM>

Improved Contract Management

We understand how important it is for you to actively monitor the terms of each contract. Renegotiating contracts can take a lot of time and effort and, if caught late, can also cause a lot of stress.

To help you monitor your contracts, on the first Monday of every month, we will email you a contract status report. This email is automatically generated and sent by ContractKing with a custom report, just for you.

Emailed Contract Report *(coming Fall 2020)*

On the first Monday of every month, we will send you an email with an attached spreadsheet that lists all of your active and recently expired contracts. The email will also include a link to the ContractKing dashboard.

ContractKing Contracts Dashboard

One exciting new feature is that the email will include a link to view a dashboard of your contracts in ContractKing. When you follow the link, you will be directed to log into Salesforce using MyAccess SSO (single sign on) credentials. When you do, ContractKing will show you a list of all your contracts and let you dig into the details of any of them. Alternatively, you can directly access your own Contracts listview in ContractKing at <https://ucsf.lightning.force.com/lightning/o/Contract/list?filterName=00B2K0000095QRnUAM>

Who can I contact with additional questions?

Like always, the procurement contracting team is here for you. If, after reviewing your reports and dashboards, you still have questions, you can always reach out to us. Your dashboard lists the assigned Contract Owner, our team member who is shepherding your requisition through the process. You can contact that person directly with any questions. For general inquiries, check out our **FAQ** or email ContractKing@ucsf.edu.

When?

ContractKing will go live on **Monday, May 25**, and will be ready for you to use when you return from the Memorial Day weekend.

Thank you, and we look forward to working with you in ContractKing next week!

- the Contracts Team

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FAQ

Q: What is ContractKing?

A: It is our renamed and enhanced contract and procurement management system. Built in Salesforce, it now comes with improved emailed reports and dashboards to help you track your Reqs and Contracts.

Q: How do I access ContractKing?

A: You will receive email notifications, which include links to your requested Reqs (either as Requestor or Project Owner). You will need to log into ContractKing using your MyAccess credentials.

You can also directly access using the following links:

My Requisitions listview:

<https://ucsf.lightning.force.com/lightning/o/Contract/list?filterName=00B2K0000095QRoUAM>

My Contracts listview:

<https://ucsf.lightning.force.com/lightning/o/Contract/list?filterName=00B2K0000095QRnUAM>

Q: What can I do in ContractKing?

A: ContractKing is a reference tool for you. You can look up the details of your Reqs and Contracts, but in a read-only view. You will not be able to edit or add information to your Reqs or Contracts. If you have any questions or comments, or need to change any information you see, please contact the Contract Owner directly.

Q: Who is the Requestor?

A: The Requestor is the “Person Completing the Form” on the Req, submitted via DocuSign.

Q: Who is the Project Owner?

A: The Project Owner is the person referenced in the “Requesting On Behalf Of (UCSF Staff Full Name)” on the Req.

Q: Who is the Contract Owner?

A: The Contract Owner is the Procurement Services team member (e.g. Buyer, Contract Administrator, etc.) assigned to process your Req.

Q: What is the difference between DocuSign and ContractKing as it relates to my Req?

A: DocuSign is used for obtaining the appropriate signature approval(s) for your Req in order for Procurement to *begin* work on the necessary contracting document(s) and/or purchase order. It’s simply a routing tool to get necessary signatures on a Req.

ContractKing is our contract and procurement management system for managing workflow as it relates to your Reqs and stores the final, signed contract document(s). ContractKing replaces the old MediTract system, which was retired in mid-2019. It's where you will go to track the progress of your Req and find your contracts and/or purchase orders.

NOTE: When a Req is marked "Complete" in DocuSign, it does not mean your Req is completed. It means that the Req has been signed off by the appropriate signature authorities, transferred to ContractKing, and assigned to a Contract Owner who will work with you and the Supplier/Vendor to complete the Req.

When a Req is marked as "Complete" in ContractKing, it means that the necessary contract document(s) and/or the purchase order(s) has/have been fully executed, which means it's been signed by all the parties to the contract. The fully executed contract document(s), such as the contract and purchase order, will be stored in ContractKing. The contract process is now complete!

Q: What if I don't normally do this and I know nothing about Reqs, Contracts, and Purchase Orders?

A: Please see our Contracts 101 overview at <https://www.supplychain-ucsfhealth.org/contracting>

Q: What emails will I receive and how often will I receive them?

A: You will receive email notifications:

- a. **Assignment of Req:** When we assign (or reassign) your Req to a Contract Owner within our team.
- b. **Completion of Req:** When we complete your Req and the contract has been fully executed and corresponding purchase order has been issued.
- c. **Bi-Monthly Req Report:** Twice a month (2nd & 4th Monday starting Fall 2020, you will receive a summary list of your open and recently completed Reqs ("Requisitions Report").
- d. **Monthly Contracts Report:** Once a month (1st Monday) starting Fall 2020, you will receive a summary list of the active contracts ("Contracts Report") which were executed as a result of your completed requisitions.
 - a. For SOWs and change orders/amendments, the associated Req will also be listed.
 - b. For governing documents, the associated Req cannot be listed at this time.

Q: Why am I receiving the contracts report?

A: As either the Requestor or Project Owner, the Contracts Report is for you to actively monitor the terms of each contract, particularly "Terminate Date." To extend or renew an existing contract, please [submit a req](#) at least three months prior to the terminate date. Please note that if no action is taken on an existing contract within 60 days after the terminate date, the contract will be moved to "Inactive" status and will no longer appear in the contracts report.

The report, an attached Excel file, will include critical details of the contracts you own. Each of your contracts will appear as a row in the spreadsheet, including information about the contract, when it expires, and a link to see more details in ContractKing.

When you follow the link, your browser will launch the ContractKing Salesforce application. You will be asked to log in using your MyAccess Credentials. Once logged in, you will be directed to the detail view of the contract, where you can find a lot more information.

Q: Do I have to anything with these emails?

A: Generally, these emails are updates to keep you informed so you know what Reqs are in progress and what active contracts you have out there and when those contracts are going to expire or “terminate” as described above.

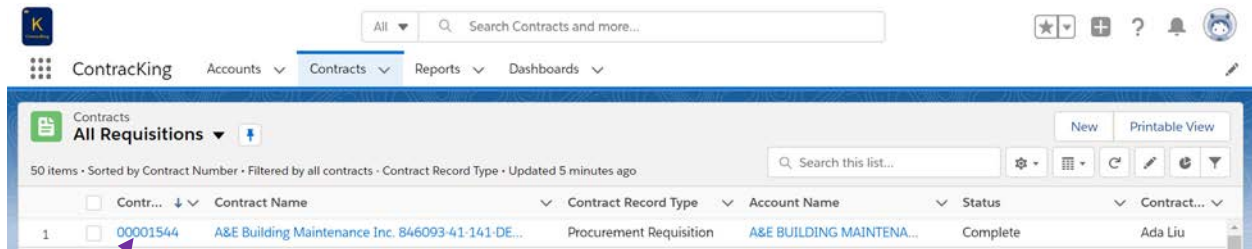
The only action required is to monitor your Contracts Report to submit another Req if you want to renew or extend an existing Contract before it terminates.

Q: Can I view all requisitions in ContractKing?

A: You can view only the Requisitions that you requested (either as Requestor or Project Owner).

Q: What will the dashboard look like?

A: Here is an example of your requisitions dashboard:



Click here to drill down to details of the Req

Here is an example of how and what a Req will display:

1. **Status Bar:** current status will be highlighted
2. Requisition **Details**
3. Navigates you to **Box** to view contract document(s)
 - a. Contract document(s) become available only after status is Complete (*see status bar*)
4. **Contract Owner** is the Procurement Services team member (e.g. Buyer, Contract Administrator, etc.) assigned to process your req.
5. View **Hierarchy** shows a report view of how this Req relates to any other contract(s) such as a Master Maintenance Agreement, Statement of Work, etc., if it does at all (*see also #8*)
6. Copy of the original **Req** that was routed through DocuSign

7. **Notes** contains anything noteworthy about the Req and the detailed progress of your Req.
 - a. For example, we might be doing things such as “Sent questions to Vendor,” “Sent questions to Department,” “Waiting for review from UCSF Risk,” or we might have “Sent reminder for UCSF IT Security Risk Assessment.
 - b. There can be multiple notes in this section. The most recent note will appear in your bi-monthly Req Report in a field called “Last Note.”
8. **Governing Doc, SOW, Amendments** that are related to your Req

The screenshot shows the 'Contracting Procurement Requisition' page. The interface includes a top navigation bar with 'Contracting', 'Accounts', 'Contracts', 'Reports', and 'Dashboards'. A search bar is located at the top right. The main content area is divided into several sections:

- 1**: Contract Number (00001440)
- 2**: Requisition details (Governing Documents, Amendments/Change Orders, SOWs)
- 3**: Details section (General, Contract Details, Contract History, System Information)
- 4**: Contract Name (Quest Group 865009-41-111JUTEST By Jill Garrison)
- 5**: Contract Owner (Jen Uy)
- 6**: Files (2) section containing documents like 'QUEST_GROUP_SFHEA-3675218C.doc.pdf' and 'UCSFMC Purchase REQ template_v29_01.23.20_wo links.pdf'
- 7**: Notes (0) section
- 8**: DocuSign Status (1) section with a table of envelopes.

Envelope #	Sender	Subject	Envelope Status
DSX-0001178	SOM Technology	UCSF Health Purchase Requisiti...	Completed

Q: Who can I contact with additional questions?

A: Contact the assigned Contract Owner about a specific requisition or send an email to Contracting@ucsf.edu for general inquiries.

Revised June 17, 2020