

sCONTRACT - Phase Owner  
Adding Amendments, SOW,  
Orders, BAA, DPA, etc.



sContract  
Phase Owner

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# IT – Phase Owner Amendment, Addendum, Statement of Work (SOW), Order, BAA, NDA, etc.

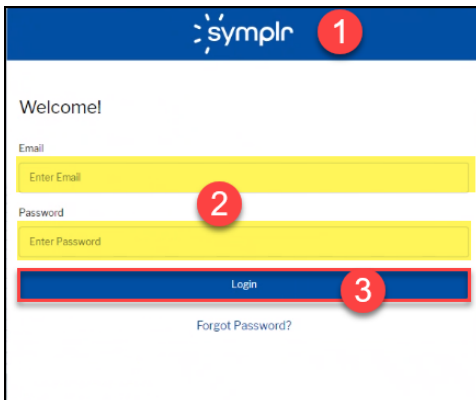
## symplr Contract

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

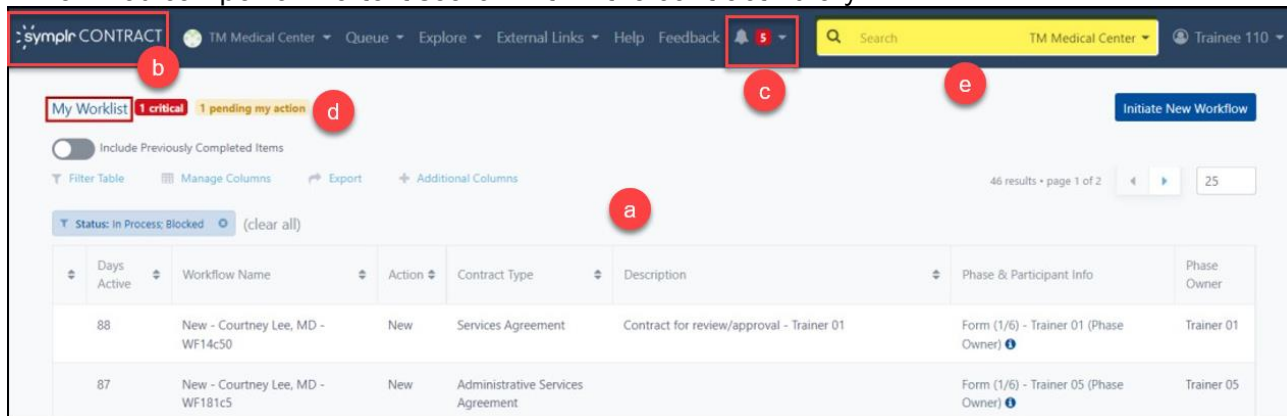
### Logging In

To log in to symplr Contract, you need an email address and password. Open your browser, navigate to the tenant using the appropriate URL. You'll only need to do this once.

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



### sContracts

Amendment, Addendum Adding Statement of Work (SOW),  
Order, BAA, NDA, etc.

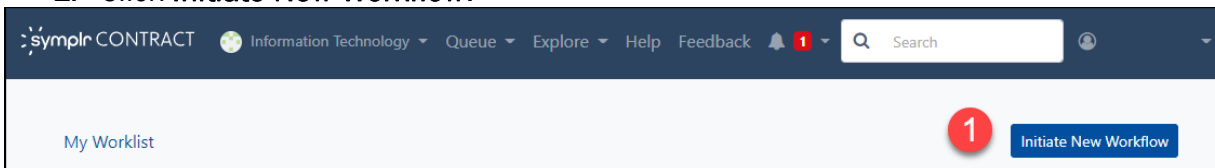
Updated: 1/27/2023



# Adding an Amendment, Addendum, Statement of Work (SOW), Order, BAA, NDA, etc.

BAA and DPA can be added through this same process, if it wasn't completed originally when the master was processed. In this workflow, you **won't** add **Master Agreements**. To add an amendment, addendum or SOW:

1. Click **Initiate New Workflow**.



2. You'll need to fill out four required fields (in red). **Note:** Don't change preselected options.

- a. **CONTRACT LOCATION:**

- o When selecting the location, you'll choose the:

- (O) Organization

- (E) Entity

- (S) Site: Always select **Systemwide** unless the agreement is for the RI (HMRI) only.

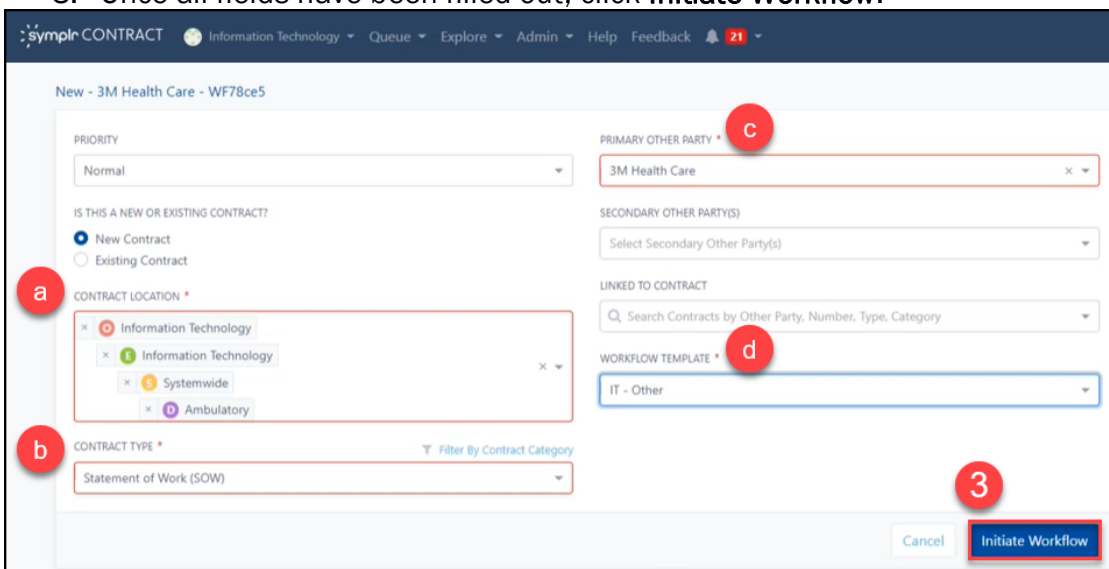
- (D) Department

- b. **CONTRACT TYPE:** Statement of Work (SOW), Addendum, BAA, NDA, etc.

- c. **PRIMARY OTHER PARTY:** Vendor



- d. **WORKFLOW TEMPLATE:** IT – **Other** (not for Master agreements or Amendments)

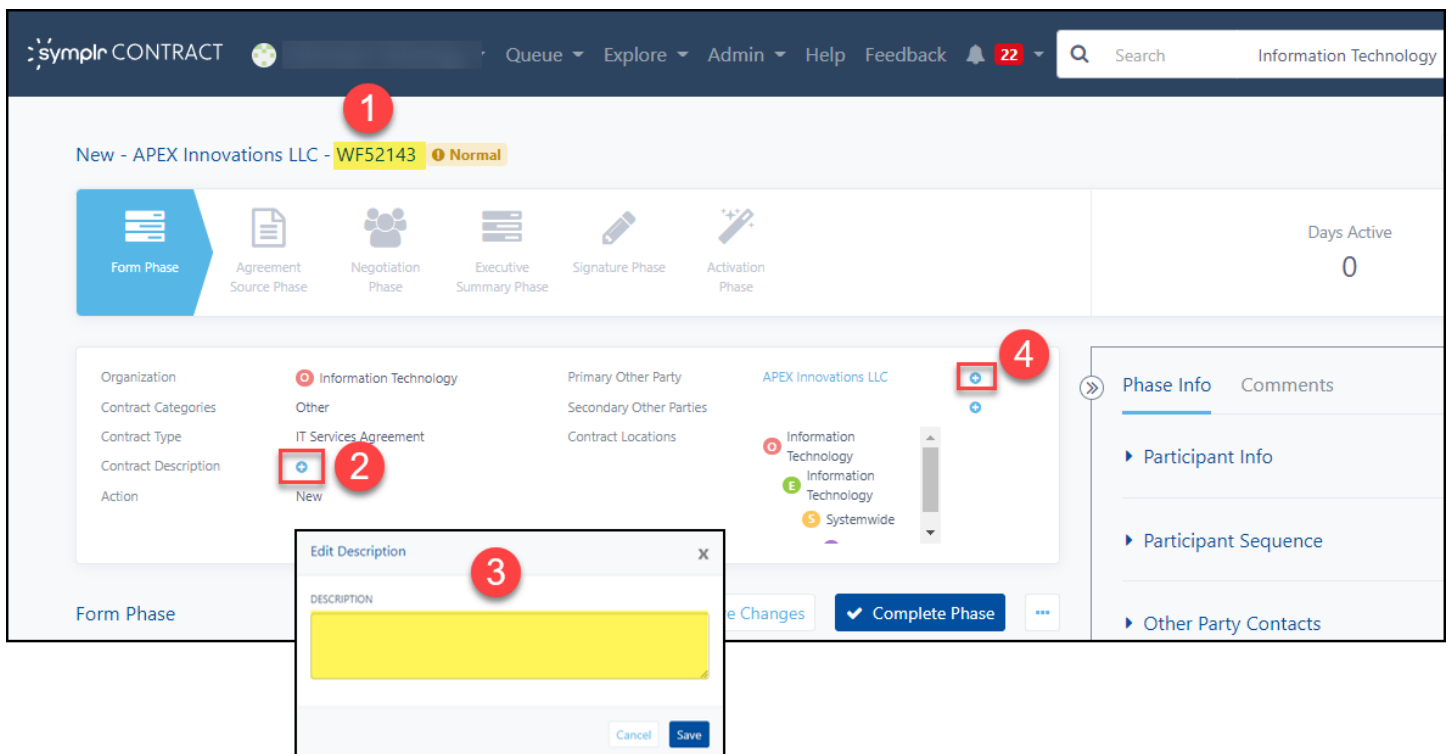
3. Once all fields have been filled out, click **Initiate Workflow**.



## Form Phase

In the **Form Phase**, you'll complete questions pertaining to the type of contract you're requesting, or simply complete the contract cover sheet. You can also leave comments and upload supporting documents under attachments. Agreements should be uploaded in the **Agreement Source Phase**, not the **Form Phase**.

1. A unique workflow ID is assigned to the workflow as highlighted below.
2. Click the **blue plus sign**  next to **Contract Description** (description will display in **My Worklist**).
3. Enter naming conventions as shown below, in the **Description** box.
  - a. Naming convention example: "Vendor name service description": Medasource SOW - Consulting Services.
4. The "vendor" or **Primary Other Party** can be changed by selecting the  next to **Primary Other Party**.



The screenshot displays the Sympplr CONTRACT interface. At the top, there is a navigation bar with 'Queue', 'Explore', 'Admin', 'Help', 'Feedback', and a search bar. The main content area shows a 'New - APEX Innovations LLC - WF52143' workflow. A 'Form Phase' button is highlighted with a red circle '1'. Below it, a 'Contract Description' field is highlighted with a red circle '2', and a 'Primary Other Party' dropdown menu is highlighted with a red circle '4'. An 'Edit Description' dialog box is open, showing a yellow text input field and 'Cancel' and 'Save' buttons, with a red circle '3' highlighting the 'Save' button.

# IT – Phase Owner

## Amendment, Addendum, Statement of Work (SOW), Order, BAA, NDA, etc.

### Completing the Form

1. Click **Start Phase**.
2. Click on the toggle to allow for **Single-page** view. Scroll down to complete.
  - o 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 **Save Changes**. Answers won't autosave while in single-page view.

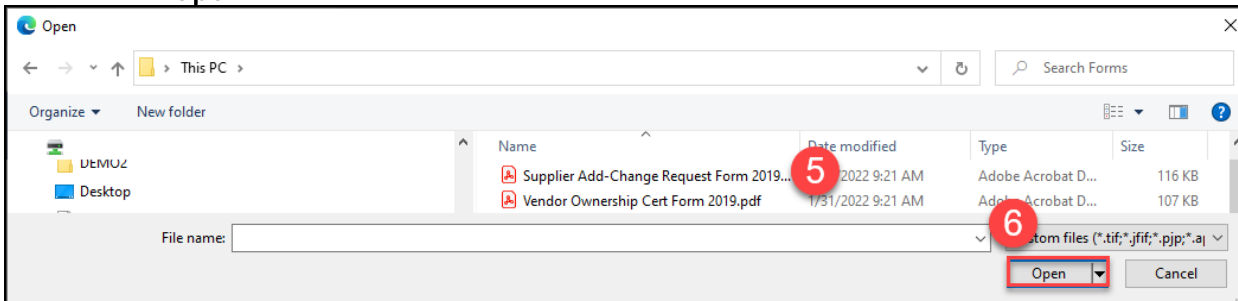
The screenshot shows the 'symplr CONTRACT' interface for a new contract. The top navigation bar includes 'Information Technology', 'Queue', 'Explore', 'Admin', 'Help', and 'Feedback'. The main content area is titled 'New - APEX Innovations LLC - WF52143' with a 'Normal' status. Below the title are several phase options: 'Form Phase', 'Agreement Source Phase', 'Negotiation Phase', 'Executive Summary Phase', 'Signature Phase', and 'Activation Phase'. The 'Form Phase' is selected. The form includes fields for 'Organization' (Information Technology), 'Contract Categories' (Other), 'Contract Type' (IT Services Agreement), 'Contract Description' (with a red asterisk indicating a required field), and 'Action' (New). A 'Save Changes' button (a) and a 'Start Phase' button (1) are visible. A 'Single-page' toggle (2) is also present. A red arrow (4) points to the 'CONTRACT DESCRIPTION' field, which contains the text 'TEST'.

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

The screenshot shows a modal dialog titled 'ATTACH VENDOR ADD DOCUMENT' with an information icon. Below the title is a blue button labeled 'ADD ATTACHMENT' and a red circle with the number 4.

# IT – Phase Owner Amendment, Addendum, Statement of Work (SOW), Order, BAA, NDA, etc.

5. Select the appropriate document.
6. Click **Open**.



7. In the **DOCUMENT NAME** field, enter a name that helps identify what the agreement is for.
  - The document name will be pulled into this field.
    - Naming convention should be: **Vendor – Supporting Document Name (descriptor)**.
      - Example: Abiomed – Supplier Add-Change Request Form
      - Example: Healthier Alternatives – ACH Payment Form
8. Select the appropriate **DOCUMENT CATEGORY** from the dropdown and click **Save**.
9. Click **Save**.

**Add Attachment**

ATTACHMENT NAME \*  
Vendor Ownership Cert Form 2019 .pdf

ATTACHMENT CATEGORY \*  
Vendor Ownership Form

ATTACHMENT SUBJECT  
[Empty field]

ADDITIONAL NOTES  
[Empty text area]

EFFECTIVE DATE [Calendar icon]      EXPIRATION DATE [Calendar icon]

Mark as Confidential  
 Visible to External Party users

Cancel    **Save**

# IT – Phase Owner Amendment, Addendum, Statement of Work (SOW), Order, BAA, NDA, etc.

## 10. Click Complete Phase.

The screenshot shows a 'Form Phase' interface with the following details:

- Organization: Information Technology
- Contract Categories: Other
- Contract Type: IT Services Agreement
- Contract Description: [empty]
- Action: New
- Primary Other Party: APEX Innovations LLC
- Secondary Other Parties: [empty]
- Contract Locations: Information Technology, Information Technology, Systemwide, IT

At the bottom right, there are three buttons: 'Save Changes', 'Complete Phase' (highlighted with a red box and a red circle with the number 10), and a three-dot menu icon.

## Attachments

As you upload supporting documents, if needed, you'll be able to see your uploaded documents in the following places:

### 1. In the form after uploading.

The screenshot shows the 'ATTACH PRIMARY OTHER PARTY'S CERTIFICATE OF INSURANCE (COI)' section of the form. It includes an 'ADD ATTACHMENT' button and a list of attachments:

- sympplr Contract Other (11/14/2022 1:07PM - Estella Soto)

A red circle with the number 1 is next to the attachment card.

### 2. Under Phase Info>Attachments.

The screenshot shows the 'IT Intake Form' interface. The 'Attachments' section is highlighted with a red box and contains the following attachment:

- sympplr Contract Aid.pdf (11/14/2022 1:07PM - Estella Soto)

A red circle with the number 2 is next to the attachment card. Below the attachment list is a 'Manage All (1)' button.

## sContracts

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Updated: 1/27/2023

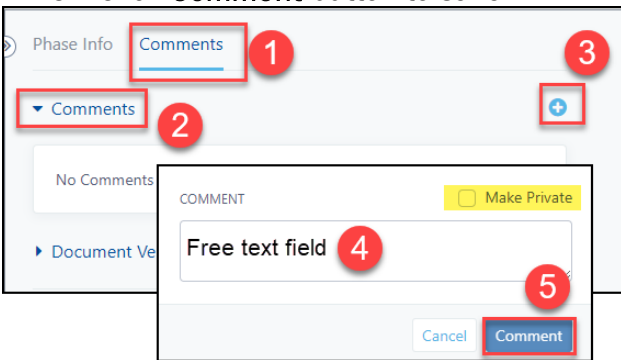




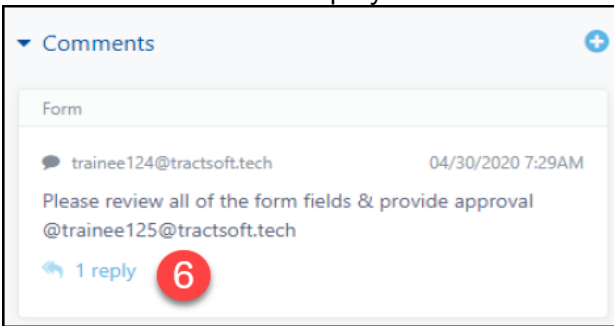
## Comments

In addition to populating fields, you can leave comments.

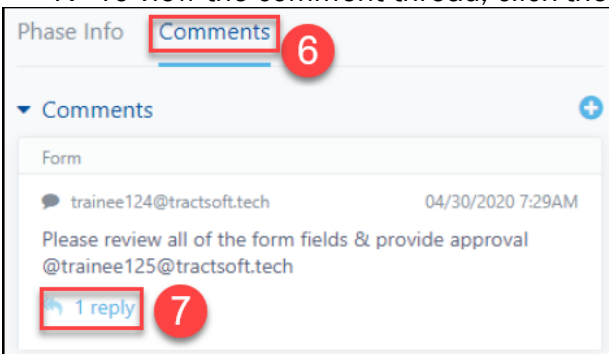
1. In the workflow, select the **Comments** tab.
2. Click **Comments**.
3. Click the **blue plus icon** to the right of the **Comments** section header.
4. In the comment pop-up window, type a message.
  - o You have the option to make the comment private.
5. Click **Comment** button to save.



6. The comment displays in the **Comments** tab with the total number of replies.



7. To view the comment thread, click the **reply** hyperlink.



# IT – Phase Owner Amendment, Addendum, Statement of Work (SOW), Order, BAA, NDA, etc.

## Agreement Source Phase

In this phase, you'll upload a **Statement of Work (SOW), Addendum, BAA, NDA, etc.**

1. Click **Upload Source File**.

The screenshot shows the Sympplr CONTRACT interface for a contract titled "New - IT Test Vendor - WF2404c". The "Agreement Source Phase" is active, and the "Upload Source File" button is highlighted with a red box and a red circle containing the number 1. The interface includes a navigation bar, a search bar, and a sidebar with various options like "Participant Info", "Participant Sequence", and "Other Party Contacts".

2. Select the appropriate **Agreement**.
3. Click **Open**.

The screenshot shows a Windows File Explorer window with the path "This PC >". The file list includes "Supplier Add-Change Request Form 2019...", "Vendor Ownership Cert Form 2019.pdf", "W - 9 Form 2019.pdf", and "BAA.doc". The "BAA.doc" file is selected, and the "Open" button in the bottom right corner is highlighted with a red box and a red circle containing the number 3.

# IT – Phase Owner Amendment, Addendum, Statement of Work (SOW), Order, BAA, NDA, etc.

- In the **DOCUMENT NAME** field, enter a name that helps identify what the agreement is for.
  - The document name will be pulled into this field.
  - Naming convention should be: Vendor Agreement Name Type of agreement.
    - Insight Global BAA
    - Insight Global SOW-Consultant Name (10312022-12312022)
    - Insight Global Quote – 10312022-12312022
- Select the appropriate **Document Category** from the dropdown.
- Click **Save**.

Add Document

DOCUMENT NAME \*  
BAA .doc

DOCUMENT CATEGORY \*  
Business Associate Agreement

Cancel Save

- Click **Start Phase**.

Organization: Information Technology  
Contract Categories: Other  
Contract Type: IT Services Agreement  
Contract Description: Information Technology  
Action: New

Primary Other Party: APEX Innovations LLC  
Secondary Other Parties: Information Technology  
Contract Locations: Information Technology, Systemwide, IT

Agreement Source Phase

IT Master Agreement Business Associate Agreement + Add Document

BAA.doc  
Business Associate Agreement  
Copy Link Delete Download Upload New Version View History

- Click **Complete Phase**.

Agreement Source Phase

IT Master Agreement Business Associate Agreement + Add Document

BAA.doc  
Business Associate Agreement  
Copy Link Delete Download Upload New Version View History