

Training for Contract Liaisons for new Contract Request in ePro TCM

AGENDA

- Areas Involved in process change
- Explanation of Total Contract Manager (TCM)
 - Access to Records in TCM
 - Logging in to TCM
- Info for Submitting a Contract Request in ePro TCM
- Submitting a Contract REQUEST in ePro TCM
 - [Exhibit A – how to complete the Contract Request](#)
- Searching for Contract REQUESTS
- Finding information
- Questions/Resources



Areas Involved in process change

The UNTS Office of Contract Administration (OCA) has been working on transitioning HSC contract records to UNTS E-PRO Total Contract Manager (TCM). As of March 19, 2025, all campuses will be using the ePro version of Total Contract Manager (TCM).

This means that the Contract Request process has been updated/modified to accommodate all contract submissions.

Thank you for your patience as we work contracts and through this transition.

<p>Contract Liaison or Requestor</p>	<p>Department Requestor/Contract Liaisons for HSC Campus</p> <ul style="list-style-type: none"> • will submit the appropriate Procurement Method (PCARD or requisition) • Initiate/manage business contracts • Submit business contracts in ePro TCM
<p>Buyers</p>	<p>UNTS Purchasing is responsible for compliance with established purchasing guidelines, Texas procurement requirements, and Requisition-to-Purchase Order Processing. Buyers@untsystem.edu</p> <p> Effective March 19, 2025 for contracts where the payment method is a Purchase Order, the Buyers will submit the Contract Requests in ePro TCM (all campuses). See Exceptions</p>
<p>Contracts</p>	<p>UNTS Office of Contract Administration facilitates business contract processing, routing and administration. UNTScontractadmin@untsystem.edu</p>

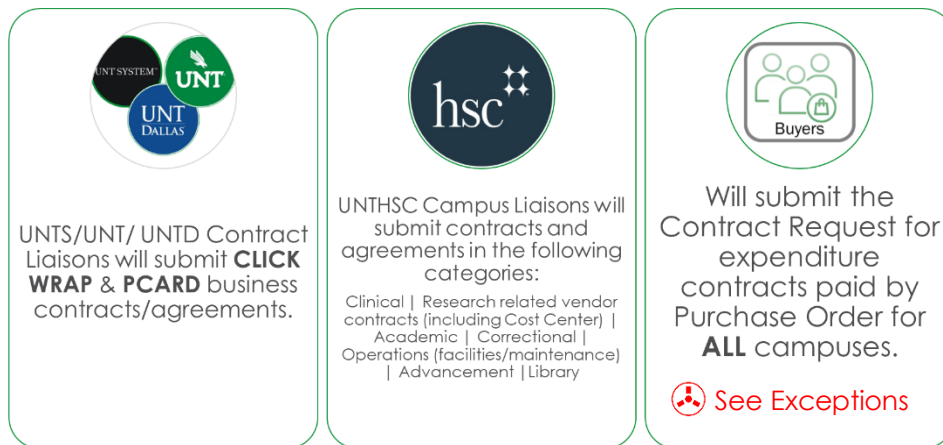
What is Total Contract Manager (TCM)?

What is TCM?

Total Contract Manager (TCM) is a web-based tool to assist with contract administration and is designed to enable organizations to manage the complete lifecycle of contracts from authoring to approval.

TCM is a way to submit contracts to the UNTS Office of Contract Administration (OCA) when submitted from the department or division; contracts may also be submitted by the Strategic Sourcing Department when an RFP (Request for Proposal) is involved.

In ePro TCM, the BUYERS will submit Contract Requests for expenditure contracts where the payment method is a requisition/Purchase Order for **ALL campuses**. Please ensure that the Requestor has uploaded all contract related information to the requisition.



Exceptions to the BUYER submitting the Contract Request in ePro TCM:

- When the requisition auto approves to a PO
- After PO dispatch, if the vendor rejects PO Terms & Conditions
- After PO dispatch, if the vendor requires signatures

If these exceptions apply, the **Contract Liaison** submits the Contract Request in ePro TCM.



****IMPORTANT**** the Department Liaison role is required to submit Contract Requests. To acquire the appropriate role in TCM to submit contracts, complete the Contract Liaison Delegation. For UNTS/UNT/UNTD users: delegate a Contract Liaison by completing the online Contract Liaison Delegation form: [Contract Liaisons \(untsystem.edu\)](https://untsystem.edu)

Logging in to TCM

The information in TCM is the property of the University of North Texas System. Your use of this resource represents an agreement to abide by the UNT System Board of Regents Rules, federal and state laws, as well as institutional policies and our UNTS Values.

Logging in to TCM is easy! Log in to ePro and then access the Contract Module: [Total Contract Manager \(TCM\) in ePRO \(formerly UNTS Marketplace\)](#).

▪▪ Info for Submitting a Contract Request in ePro TCM

- Department Contact Information
- If applicable, IT approval (release from Technical Acquisition Questionnaire (TAQ))
- If applicable, procurement method (requisition or PCARD)
- If applicable, any additional approvals
- Vendor/2nd Party information (contact, email and phone)
- Attachments
 - Contract
 - Terms & Conditions
 - Emails, etc.

▪▪ Submitting a Contract Request in ePro TCM

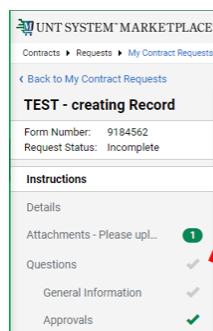
As of Wednesday, March 19, 2025 New Contract Request [TCM Contract Request (FEB2025)] in ePro Total Contract Manager will be the only Contract Request in use.

UNTS/UNT/ UNTD Contract Liaisons will use the updated Contract Request form to submit CLICK WRAP agreements and business contracts/agreements that will be paid by Pcard.

 See Exceptions Other than PCARD & Clickwrap Agreements, you will be submitting Contract Requests for contracts/agreements where the payment is a Purchase Order and:

- the requisition auto approves to a PO
- After PO dispatch, if the vendor rejects PO Terms & Conditions
- After PO dispatch, if the vendor requires signatures

You are completing this training to learn about TCM and to be able to submit contracts to us via TCM.



› The goal is achieve green check marks on the Questions section.
– All fields with an asterisk (*) have to be completed

Step-by-Step


1. Navigate to *Contracts* > *Requests* > *Request Contract* or use the Quick Link on the Default Contract or Contract Liaison dashboards:






















2. Complete the Contract Request Name - Enter a name for the contract request. If applicable, include the requisition/Purchase Order number.
3. Select *TCM Contract Request (FEB2025)*. Click > Submit.
4. Click *Submit*. The contract request opens to the Instructions page, which provides information regarding the contract request. Click *Next*.
5. The **Attachments** page displays any attachments that have been added to the contract request template. Add the attachments you want to include in the contract request and click *Next*.
6. On the **Questions** page, complete the series of questions (* means required field) and complete the fields as directed. See [Exhibit A – how to complete the Contract Request](#). Click *Save Progress*, then *Next*.
7. Click *Review and Complete*.
 - The Section column displays areas of the contract request that must be completed before it can be submitted.
 - The Progress column displays a green check to the right of the step name if all required fields have been configured for that step, or the system will indicate that information is missing. If information is missing, return to the request and enter the missing data.
8. Once the contract request is ready to submit, click the *Complete Request* button, then click *Yes* in the Confirmation window.

The Office of Contract Administration (OCA) designates categories for business contracts. These categories group agreements by contract signature delegation descriptions and often have similar purposes. Submitted Contract Requests are routed to the appropriate contract manager based on the contract category and/or dollar value.

In this section, we'll explain the various contract categories. UNTS/UNT/UND Contract Liaisons submit requests in the **Purchasing** contract category.

Category	Description	Who submits Contract Request?
Purchasing/ Procurement	Purchasing agreements are that require payment for goods or services that contain terms and conditions (either listed on the document or indicated in a website reference) and/or require signatures. However, there are contracts that require payment that are not included in this category definition. The Purchasing contract category definition does <i>not</i> include: <ul style="list-style-type: none"> • HSC Agreements that contain clinical or medical services because we categorize these as Clinical. 	Payment by Purchase Order?  See Exceptions
		Payment by PCARD?

For UNTS/UNT/UNT D Contract Liaisons

	<ul style="list-style-type: none"> • HSC Agreements that have language related to an accreditation requirement or credit hours because we categorize these as Academic. • Agreements that include protocol research because we categorize these as Research. • or HSC Agreements for construction because we categorize these as Operations. 	
<p>Clinical (HSC)</p> 	<p>Clinical agreements are related to medical services provided by physicians and/or medical providers and have unique healthcare compliance matters including, but not limited to:</p> <ul style="list-style-type: none"> • HIPAA • Fair Market Value (FMV) 	<p>Payment by Purchase Order?</p>  <p> See Exceptions</p> 
<p>Research related vendor contracts (HSC)</p> 	<p>Research related vendor agreements, including Cost Centers.</p>	
<p>Academic (HSC)</p> 	<p>Academic agreements are related to contract arrangements for students to complete residencies, internships, rotations, preceptorships, etc. They may contain language related to accreditation, credit hours, and/or academic programs.</p>	
<p>Correctional (HSC)</p> 	<p>The Correctional contract category is for exclusive use by the UNTHSC Department of Correctional Medicine for specific kind of clinical services.</p>	
<p>Operations (HSC)</p> 	<p>Operations agreements are facility leases, infrastructure, utilities, service, maintenance, and construction contracts. Lease agreements may require a Fair Market Value (FMV) analysis – be sure to check UNTHSC Policy.</p>	
<p>Advancement</p> 	<p>Advancement agreements are gift, foundation, scholarship, and other philanthropic related contracts.</p>	
<p>Library</p> 	<p>Library agreements are for Library Journals/e-books /subscriptions /databases, Catalogs (ILS) support, license of library materials and other library materials</p>	<p>Payment by Purchase Order?</p>  <p> See Exceptions</p> 

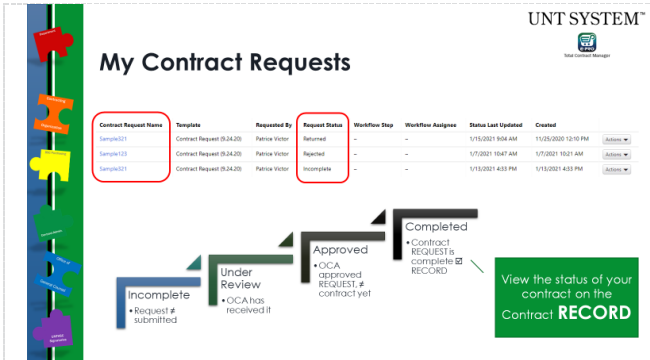
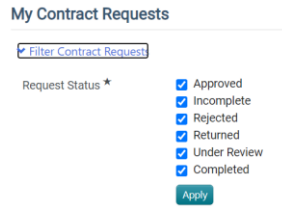
Searching for Contract Request in TCM

Step-by-Step

- Navigate to *Contracts > Requests > My Contract Requests* or use the Quick Links shortcut.
 - Click Filter Contract Requests to filter search results by contract request status.
 - Select the checkbox next to each status that applies to the contract requests that you want to display.
- Click *Apply*. Contract requests that match the filter criteria are listed.

My Contract Requests

The **My Contract Requests** page allows contracts requesters to see the requests they created and the status of those requests. You can also view, edit or create a new contract request from this page. To ensure you see all of the Contract Requests you have entered, check the filters and ensure that all of the Request statuses are selected:



Contract REQUESTS can be viewed by the submitter.



View the status of the contract from the Contract RECORD.

General Contract Routing in TCM – statuses

REMEMBER....a Contract **Request** is different than a Contract **Record**....

Let's review the difference between the statuses on Contract Requests and Contract Records below.

Contract **REQUEST**

Incomplete = Request not yet submitted

Under Review = OCA has received it, not yet processed

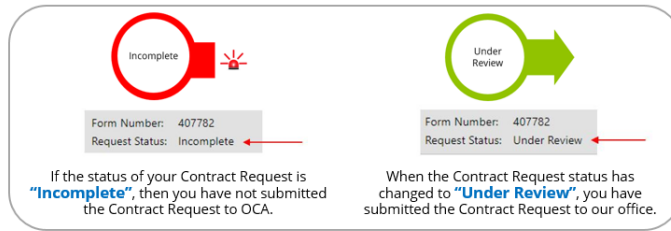
Approved = OCA approved REQUEST, no contract yet

Completed = Contract REQUEST is complete and OCA has generated a contract RECORD.

Rejected = Contract REQUEST will not be processed (Example: duplicate)

Returned = Contract REQUEST has been returned to the Requestor for revisions/corrections

For UNTS/UNT/UNT Contract Liaisons



Contract RECORD

Draft = Under construction and has not been submitted for approvals or signatures

Internal/External Review = Sent to a reviewer outside of the workflow process in TCM. (Example: OGC, OCA Director for a risk assessment)

Pending approval = workflow approval

Pending/Out for signature = contract routing for signatures

Executed = Approved and active or will not be in effect until its scheduled start date

▪▪ Finding information

Finding Information from the REQUISITION

In ePRO (formerly UNTS Marketplace) will see the requisition workflow on the "Sourcing & Contract" step and know that the BUYER has submitted the associated contract to OCA in ePRO (formerly UNTS Marketplace) TCM.

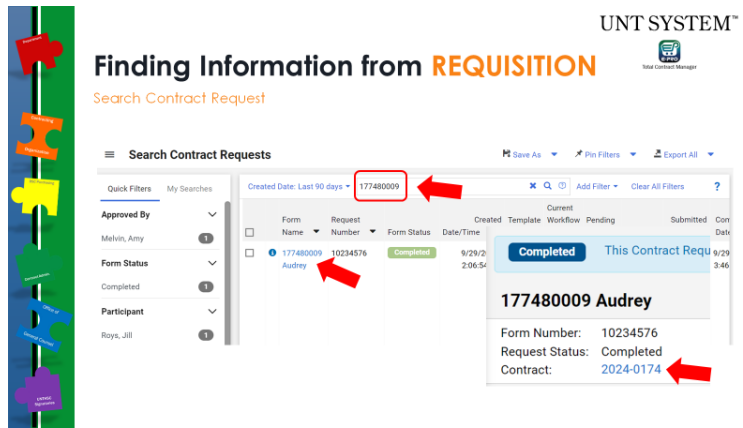
[Effective March 19, 2025 ALL campuses] Use the requisition number to search for the Contract Request & Record in ePRO (formerly UNTS Marketplace) TCM.

The screenshot shows the 'Finding Information from REQUISITION' page in the UNT SYSTEMS portal. The page title is 'Finding Information from REQUISITION' and the workflow step is 'Sourcing & Contracts'. A search bar contains the requisition number '177480009'. A callout box says 'Use the Requisition # to search for the Contract Request'. The main content area shows details for a requisition with status 'Pending'. The 'General' tab is active, showing submission details. The 'Shipping' and 'Billing' tabs are also visible. The 'Summary' section on the right shows a progress bar with steps: 'Purchasing Review' (Approved), 'Department Approval' (Approved), and 'Sourcing and Contract' (Active). A red arrow points to the 'Sourcing and Contract' step.

Searching for Contract Request submitted by Buyer in TCM

Step-by-Step

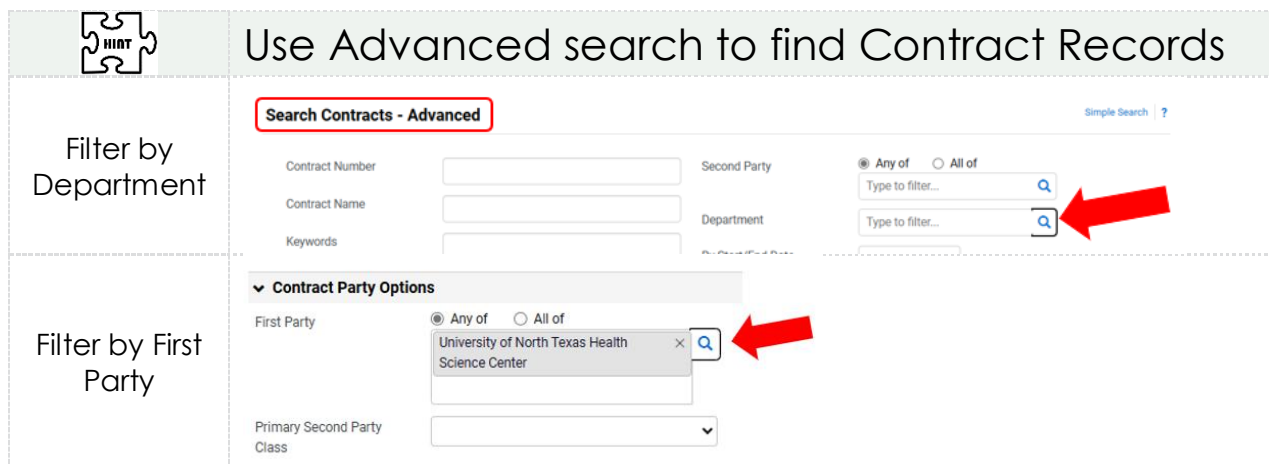
1. Navigate to *Contracts > Contract Requests > Search Contract Requests*.
2. In the search bar, enter the keyword criteria.
3. Click *Apply*. Contract requests that match the filter criteria are listed.



4. Click the hyperlinked Contract Request in the *Form Name* column.
5. Click the Contract RECORD number to view the status of the Contract.

Searching in ePro TCM

Searching in ePro TCM will yield results for all contracts not marked confidential.
 Recommendation: filter by department and/or First Party.



To save a search, see the *Quick Reference Guide - Reports & Searches* on the TCM webpage.

▪▪ Questions/Resources

UNT System Procurement, Contracts

Department Email: UNTScontractadmin@untsystem.edu

HSC External webpage: <https://www.unthsc.edu/division-of-finance/contract-administration/>

HSC Internal webpage:

[https://myunt.sharepoint.com/sites/HSCFinanceWebsite/SitePages/Total-Contract-Manager-\(TCM\).aspx](https://myunt.sharepoint.com/sites/HSCFinanceWebsite/SitePages/Total-Contract-Manager-(TCM).aspx)

- Total Contract Manager (TCM): [Total Contract Manager HSC OCA webpage](#)

UNTS OCA webpage: <https://finance.untsystem.edu/contract-administration/index.php>


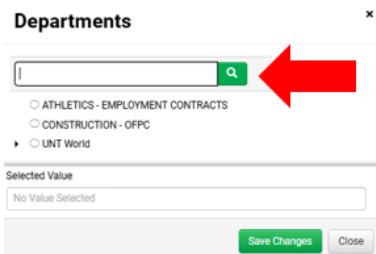
- Total Contract Manager (TCM): [Total Contract Manager UNTS OCA webpage](#)

Exhibit A – how to complete the New Contract Request in ePro TCM

All fields with an asterisk (*) have to be completed in order to submit the Contract Request.

NEW CONTRACT REQUEST TEMPLATE = TCM Contract Request (FEB2025) effective 3/19/2025

Department Contact Information

What Requestor Role do you have?*	Select "Department"
Name of Requestor*	Enter the name of the person submitting the Contract Request, especially if a different individual than the Department Contact/Contract Liaison.
Requesting Entity*	Select your campus.
Department*	<p>Type to filter...  Use the magnifying glass to search for your department.</p>  <p>Enter your department name here. Select saved changes. If you do not find your department, contact OCA via email.</p>
Dept Contact Name*	Enter the appropriate individual's contact information.
Dept Contact Email*	
Dept Contact Phone #	

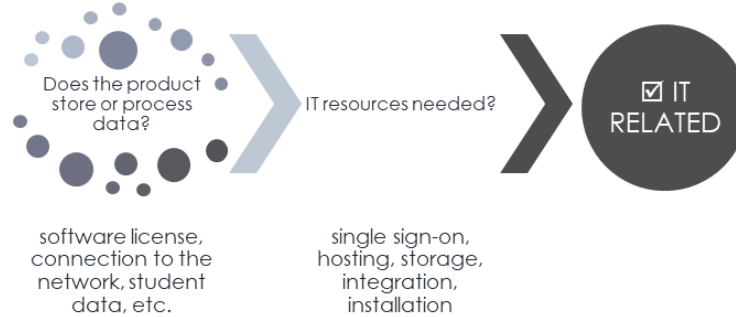
Contract Information

Summary*	Describe the contract's general purpose and a short description of the services/scope of work.
Contract Value Type*	Select the appropriate contract type [Revenue, Non-monetary, Expenditure] (if "Revenue or Expenditure" selected, answer the conditional field) <ul style="list-style-type: none"> Monetary Value Range* [\$2500 or less, \$2501-\$10k, \$10,001-\$50k, \$50,001-\$100k, \$100,001-\$250k]
Is this a Clickwrap purchase?*	<input type="checkbox"/> Yes/ <input type="checkbox"/> No (if "Yes" selected, answer the conditional field) <ul style="list-style-type: none"> URL address
Type of Agreement*	[New Agreement, Amendment/Addendum/Change Order, Renewal] (if "Amendment/Addendum/Change Order or Renewal" selected, answer the conditional field) <ul style="list-style-type: none"> Existing Contract Number*
Total Contract Value*	Enter the value of the contract for the full term. If the contract is "non-monetary" enter \$0.
Contract Category*	UNTS/UNT/UNT D Contract Liaisons select "Purchasing"
Does this need manual signature in addition to an eSignature?	<input type="checkbox"/> Yes/ <input type="checkbox"/> No If the vendor/2 nd party will not accept DocuSign at all or will accept the University signature via DocuSign but will not countersign via DocuSign, please select "Yes".

IT Questions

Does the product store or process data? [software license, connection to the network, student data, etc.] Or *are IT resources needed?* [single sign-on, hosting, storage, integration, installation]. **If the answer is “yes” to either question, the contract/purchase is IT related.** IT approval can be acquired by submitting a Technical Acquisition Questionnaire (TAQ) that is available within ServiceNow. The TAQ must now be completed, and an IT Compliance Release obtained prior to submission of the requisition & routing of the contract.

Determining if your contract is IT related



The link to the TAQ is available at the System IT, Acquisition of Technology Resources page: <https://itss.untssystem.edu/divisions/mrs/it-compliance/technology-risk-assessment-program.php>.

Is this IT Related?*	<input type="checkbox"/> Yes/ <input type="checkbox"/> No (if “Yes” selected, answer the conditional field) <ul style="list-style-type: none"> Does the product already have IT approval?* <input type="checkbox"/>Yes/<input type="checkbox"/>No Does the product already have TX-RAMP certification? <input type="checkbox"/>Yes/<input type="checkbox"/>No
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Expenditure Contract Information

This section appears when “Expenditure” is selected on *Contract Value Type*.

Is this a PCARD purchase?*	<input type="checkbox"/> Yes/ <input type="checkbox"/> No (if “Yes” selected, answer the conditional field) <ul style="list-style-type: none"> PCARD Purchase Categories* [Catering, Goods, Events & Services, Hotel, Other]
Procurement Method*	[Under \$15,000, Formal Solicitation (RFX), Informal Solicitation, GPO (Cooperative), Exclusive Acquisition] (if “Formal Solicitation (RFX)” selected, answer the conditional field) <ul style="list-style-type: none"> Enter the RFP Number (if “Informal Solicitation” selected) <ul style="list-style-type: none"> [Sole Source, Proprietary, Exempt, Emergency] if submitted by dept, upload the Informal Quote Summary (IQS) (if “GPO (Cooperative)” selected, answer the conditional field) <ul style="list-style-type: none"> Select the GPO (Cooperative) from the dropdown list Enter the GPO Contract Number
Buyer Name*	[Ashley Barraza, Becky LaDuke, Jill Roys, Gabriel Morales, TBD] Select TBD if a Buyer has not yet been assigned to the requisition.
Requisition Number	Enter the valid, current ePro Requisition Number
Purchase Order Number	If applicable, enter the valid, current ePro Purchase Order Number
Previous Purchase Order Number	If applicable, enter the valid, ePro Purchase Order Number for the previous order/contract
Purchased on State Funds?*	<input type="checkbox"/> Yes/ <input type="checkbox"/> No

For UNTS/UNT/UNTD Contract Liaisons

Has the Purchase Order (PO) already been issued?	<input type="checkbox"/> Yes/ <input type="checkbox"/> No (if "Yes" selected, answer the conditional field) <ul style="list-style-type: none"> Is this PO submission due to: [rejected PO terms and conditions?, redline changes to PO terms and conditions or contract?, signature "required" by vendor?]
NIGP Commodity Code*	Enter NIGP Commodity Code

Academic Contract Information

This section appears when "Academic" is selected on Contract Category.

If you see this section on the Contract Request, return to the Contract Category field and select "Purchasing".

Vendor/2nd Party Information

For this section, the terms "vendor" and "2nd party" mean the same thing.

Vendor Name*	Enter the vendor/2nd Party's legal name
Vendor Contact Name*	Enter the appropriate individual's contact information.
Vendor Email Address*	<i>If submitting a CLICKWRAP agreement, you may enter "n/a" for the contact information you are not able to acquire.</i>
Vendor Phone Number	
Authorized Signatory Name and Title	This field is NOT required so if you don't have this info, you may leave these fields blank. This information is helpful to lessen delays in acquiring the vendor/2nd party signature.
Authorized Signatory Email - 2nd party	This field is NOT required so if you don't have this info, you may leave these fields blank. This information is helpful to lessen delays in acquiring the vendor/2nd party signature.

Additional Information/ Special Instructions

Agreements are processed on a first-in first-out basis. Timelines for contract processing and execution are estimated and can take more or less days depending on the complexity of the contract, applicable contract approvals (including responses/approvals from external parties), the volume of contracts currently in process, the availability of the University staff to process and the availability of all signatories (both internal and external) to execute contracts.

Requests for Rush/Priority processing will be accommodated on a case-by-case basis.

You may use the "[FAQ When Should I Start My Contract](#)" tool for general informational purposes to assist with planning. Use of this tool is optional and does not replace any deadlines communicated in policy, process or procedure related to contract timelines.

Additional Information/Special Instructions	Enter instructions or information that's helpful for contract review, routing, or signature.
Is this a rush?*	<input type="checkbox"/> Yes/ <input type="checkbox"/> No (if "Yes" selected, answer the conditional fields) <ul style="list-style-type: none"> Date Needed By* Justification for priority processing*
Is contract confidential in nature?*	<input type="checkbox"/> Yes/ <input type="checkbox"/> No

Additional Requirements/Approvals

Hints for this section:

BOR (Board of Regent) approval is required for the following types of contracts: 1) Any contract that exceeds \$5,000,000 in the current fiscal year or 2) Any contract that exceeds \$2,000,000 per year for a multi-year contract. See [Regent Rule 3.9](#) for additional requirements & exemptions.

A Fair Market Value (FMV) analysis may be required for contracts with a potential referral source (related to the provision of medical services by physicians and providers & lease of space). See [Policy 4.105 Contract Administration Compliance](#).

<p>BOR Approval Required?*</p>	<p><input type="checkbox"/>Yes/<input type="checkbox"/>No (if "Yes" selected, answer the conditional fields)</p> <ul style="list-style-type: none"> Is BOR approval included in attachments? <input type="checkbox"/>Yes/<input type="checkbox"/>No <p><i>Per RR 03.900 Delegation of Authority for Contracts and Agreements, Board approval is required for Any contract that exceeds \$5,000,000 in the current fiscal year or any contract that exceeds \$2,000,000 per year for a multi-year contract (unless exempt under RR 3.905).</i></p>
<p>Is this a foreign vendor?*</p>	<p><input type="checkbox"/>Yes/<input type="checkbox"/>No</p> <p><i>A foreign government, including an agency of a foreign government; a legal entity created solely under the laws of a foreign state or states; an individual who is not a citizen or national of the United States; and an agent acting on behalf of a foreign source.</i></p>
<p>Fair Market Value Analysis (FMV) Required?*</p>	<p><input type="checkbox"/>Yes/<input type="checkbox"/>No (if "Yes" selected, answer the conditional fields)</p> <ul style="list-style-type: none"> FMV Attached* <input type="checkbox"/>Yes/<input type="checkbox"/>No <p><i>A Fair Market Value (FMV) analysis may be required for contracts with a potential referral source (related to the provision of medical services by physicians and providers & contracts for lease of space).</i></p>
<p>Were any additional approvals obtained?*</p>	<p><input type="checkbox"/>Yes/<input type="checkbox"/>No (if "Yes" selected, answer the conditional fields)</p> <ul style="list-style-type: none"> (Mark all that apply) Which additional approvals obtained? [Legal Approval, Compliance approval, Facilities approval, Human Resources approval, Marketing approval, Telecommunications approval, Risk Management, PCARD exception, Other (not listed)] Approval(s) added to the attachments section? <input type="checkbox"/>Yes/<input type="checkbox"/>No
<p>Please mark each applicable selection below to identify all circumstances relevant to this contract/agreement.</p>	<p>[Use of University logo/seal, Financial Interest/Conflict of Interest disclosure, changes to insurance (limits, coverage), Intellectual Property/Export Control] <i>This information will assist OCA in determining reviewers/approvers for the contract/agreement.</i></p>