

HOW DO I FIND OUT THE STATUS OF MY CONTRACT?

ISSUE: If you are reading this, you have either submitted a contract directly to the UNTS Office of Contract Administration via a Contract Request, or another team/individual has submitted a Contract Request on your behalf and you would like to know the status. How do you find the contract and the status?!

ANSWER: In Total Contract Manager (TCM) in there are several ways you can find a contract.

NOTE: The search features are the same for HSC-TCM and TCM in UNTS Marketplace.





Total Contract Manager

When the configuration is different, I have included the appropriate logo to communicate which system (HSC-TCM or UNTS Marketplace-TCM)

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ACCESS TO RECORDS IN TCM

The UNTS Office of Contract Administration is managing access to information in TCM by permissions and roles. If you do not have access to the information or receive an error message, you may not have a User role or be listed within the department that permits access. Contact the UNTS Office of Contract Administration for assistance: Email: UNTScontractadmin@untsystem.edu.

- 1. In Total Contract Manager (TCM), the *Search Contracts* page is key to locating the contracts you need.
- 2. In the navigation menu on the left of the screen, select the Contracts icon, then Contracts, then Search Contracts.

OCA Job Aid



For Contract Liaisons - Total Contract Manager (TCM) module

A Home	Contracts		Type to Search Contracts	٩
📜 Shop	Contracts	~	Contracts Home	
C Orders	Approvals		Search Contracts	
Contracts	5 Libraries		View Saved Searches	
		Figure 1	Search Contract Attachments	

- 3. There are two ways to search, and which type to use depends on what you're looking for:
 - Use <u>Simple Search</u> when you may not have all the information you need and want to search based on
 partial information. The system will search all contract fields for each keyword entered, providing you
 with a broad results set.

Contract 📀	Search by contract nar	me, number, summary,	tc.	۹.	
By Start/End Date	All	~			
Created Date	All Dates	~			

• Use <u>Advanced Search</u> when you have exact data or a complex set of values that you want to search for, e.g., you have a contract number, or want to apply multiple search filters to limit the number of search results. The system only returns results that are an exact match to the values entered.

Advanced				Simple Search ?	
1	Second Party	Any of O All of			
		Type to filter	۹		
	Division	Type to filter	٩		
Type to filter	By Start/End Date	All		Togglo botwoon "Sin	nnlo
Turne to filter	Created Date	All Dates	~	Soarch" and "Advan	iple
type to intef	Approvals Completed	All Dates	~	Soarch" with this liv	nk
	Scheduled Termination	All Dates	~		IK.
Name, User Name, Email	Q Contract Term Extended				
			×		
	Include Archived	No	~		
	Contract Ended Early		~	and All Collinson All	
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Figure 3

All users can search for contracts, but results and access will vary depending on your user permissions and system licenses.

If you often search for the same things, you can save your search settings in a saved search to use again. To learn how to save a search, see the <u>Quick Reference Guide - Reports & Searches</u>.

OCA Job Aid



For Contract Liaisons - Total Contract Manager (TCM) module

SUGGESTIONS FOR SEARCHING

UNT SYSTEM MARKETPLACE Total Contract Manager In UNTS Marketplace, you can search for the requisition # or the Vendor (external party) 4. name in the "Contract Name" field

VIEW IN SIN	/IPLE SEARCH	VIEW IN ADVANCE SEARCH
Search Contracts	Advanced Search ?	Search Contracts - Advanced
Contract 😧	Search by contract name, number, summary, etc.	
Active for Shopping	All 🗸	Contract Number
By Start/End Date	All	Contract Name
Created Date	All Dates 🔹	Keywords
	Figure 4	Figure 5

5. To search by the Vendor (external party) name, search the "Second Party" field on Advanced Search



hsc

for Manager In HSC-TCM, you can search for your Contract REQUEST and access the Contract RECORD 6. hyperlink.



UNT SYSTEM MARKETPLACE Total Contract Manager In UNTS Marketplace, you can also use these steps if you submitted the Contract REQUEST.

Searching when YOU have submitted the Contract REQUEST

Step-by-Step

- 1. 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.
- 2. 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:

Filter Contract Request	J.
Request Status *	 Approved Incomplete Rejected Returned Under Review
	Completed

UNDERSTANDING THE SEARCH RESULTS

Note: Contracts that don't expire will display "No Expiration" in the End Date column on the Contract Search Results page. This is to distinguish them from contracts that are in Draft status and will not have an end date set until they are approved and active.

The image below shows an example of the contract search results.

^	hsc ⁱⁱ Contracts > Contracts > Search Contracts < Back to Search Start Over	4	a 🌣 🚾 🍋
1 🐣	Search Details	Contract Search Results	?
	Filtered by	C > Page 1 of 200 1-20 of 4000 Results Sort by Best Match	✓ 20 Per Page 👻
2	By Start/End Date: All Save New Search Export Search	Contract Details N-15853 Netoc. Ltd Yang	Open Summary
3	Refine Search Results Show on Supplier Portal	P Second Party: Nestec, Ltd. Statu Date: 9/1/2013 Version Type: Original Contract Type: Research Grant End Date: 12/31/2014 RevenueNoc: 0 Statu: Expired Amendment Noc: 0 0 0	
J	No (4000)		
	Contract Ended Early No.628880 Ves (12) Contract Status Expired (2646) Executed: In Effect (1035) Tormisoles (218)	N-15714 AMS Sciences, LLC / Tenfold Technologies, LLC, dba Agricen Sciences Second Party: AMS Sciences, LLC / Tenfold Technologies, LLC, dba Agricen Sciences Status: End Date: Status: Experient End Date: 8/31/2014 Version Type: Original Renewal No:: 0 Amendment No:: 0 Status: Experient Status: Experient	Open Summary
	Complete (1) Complete (1) Contract Version Type Original (3973) Amendment (20) Reneval (7)	N-15598a Brookdale Senior Living Start Date: 7/1/2013 Version Type: Original Second Party: Brookdale Senior Living Inc. Start Date: 6/30/2014 Renewal No:: 0 Contract Type: Reserval Grant End Date: 6/30/2014 Renewal No:: 0 Status: Experied Amendment No:: 0 Image: Status: Extension Count: 0	Open Summary

Figure 7

- 7. Back to Search/Start Over
 - a. Selecting Back to Search will return you to the search page with all of our previous search criteria intact. Selecting Start Over takes you to a brand new search with no criteria entered.
- 8. Filtered by
 - b. This section displays the filters/values by which your search results are filtered. Initially, any search criteria you entered will be displayed. As you add filters, the Filtered by section will update to reflect the new filters. From this section, you can also remove a single filter by de-selecting the



associated checkbox are click the remove all link to remove all the filters. The Export Search button allows you to export the search results.

- 9. Refine Search Results
 - c. Search results can be refined by using the post-search filters. Below each filter, the available values display. The number of contracts associated with that value displays beside the value. Click on a value to filter the search results. Note: The filters and values displayed will vary based on your organization's set up and your individual permissions.
- 10. Contract Search Results
 - d. The search results display in a list and include the following information:
 - i. Contract No. The contract number. Click on the number to view the Contract Record
 - ii. Contract Name The contract name.
 - iii. Second Party Name The second party or on the contract, i.e., who the contract is with.
 - iv. Contract Type The contract type.
 - v. Status Indicates where the contract is in the contract workflow.
 - vi. Start Date/End Date The start and end date of the contract

GENERAL VIEW OF CONTRACT ROUTING IN TCM AND STATUSES

The graphic below represents a very general view of contract routing in TCM.

review the Request and the

questions or concerns, they will generate a Contract Record in TCM from the Request. OCA will also determine necessary approvals and begin routing the contract for those approvals.

contract. If there are no



The various contract approvers will either approve the contract, make revisions, or recommend that OCA not proceed with a contract.	When OCA has a final version of a contract that is ready for signature, they will obtain all signatures via DocuSign (when possible) and complete the
	Contract Record in TCM. You will find the fully executed contract on the Contract Record in the Attachments section.

REMEMBER....a Contract Request is different than a Contract Record.... These instructions are for searching for the Contract **RECORD**. The status for a **Contract RECORD** are:

1

First step, the Buyer/Pcard

Liaison submit a CONTRACT

REQUEST in TCM.



11. Draft = Under construction and has not been submitted for approvals or signatures. The Contract Manager is reviewing the contract documents and/or completing contract redlines. This status may also represent contracts ON HOLD pending information from the department, a reviewer, an approver and/or the external party.



• To view notes and real time status updates, see the Comments and Communication Center on the Contract Record

- 12. Internal/External Review = Sent to a reviewer outside of the workflow process in TCM. (Example: OGC, IT, Research, etc.)
- 13. Pending approval = workflow approval

Status

14. Pending/Out for signature = contract routing for signatures. When all parties will sign via electronic signature, view the status of the signatures in the eSignature section of the Contract Record.

Conton signatore	2023-0473 Stakeholder - The Qu	een's Med. Cntr.	
	Type: 2nd Party:	Service (Misc) The Queen's Medical	
	Dates:	9/12/2022 - 6/12/2023	
	Version:	Renewal 0, Amendment 0	
	Contract Request:	7964749	
	View Contract 👻		
	Summary		
	Header	~	
	Alternative Langu	age 🦉 💽	
	Attachments	C	
	Obligations		
	Review Rounds		
	eSignature	2	
	Approvals		

Finding Information on the Contract RECORD

• To view if the signer has received, viewed, and/signed the contract, check the $^{(1)}$ icon

For Contract Liaisons - Total Contract Manager (TCM) module



Finding Information on the Contract **RECORD**



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

Finding Information on the Contract RECORD

Children and an en	This contract	is in effect through the end-	Sele of 9/7/2023 at 12:00 AM	CD1.				1
2019-00011	S	Contract Header					Variation	evs.
OCA 2019-000115		Contract Number *	2019-000115		Contract Class	Buy-side Contri	act.	
Туре	Athliation Agreement	Contract Name *	INTERNATIONAL FORE	ION UNIVERSITY OCA 2019-	Parent Contract	-		
2nd Partyr Dates	PUTESNATIONAL FOREL. 9/7/2018 -	Contract Type *	Affiliation Agreement		Use eSignature for this contract? *	No		
Version	9/7/2023 Reneval 0	Ohision *	UNTHSC		Show on Supplier Portal III	Inherit From Ge Setting No	eneral Contract Settings (Same
Contract Request	170428				Value	0.00		
Total Contract V TCV: 0.00 USD	alue (TCV)	Summary	The primary objective of academic interchange	of this Agreement is to create of faculty and students and a	a means for cooperative efforts ademic and research informatio	between UNTHS in between the tr	C and Foreign University to no educational institutions.	atte
Ves Contract		Contract Parties						
A		Name		Currently Visible	Туре	Contact	Contract Address	
summary		University of North Tex	is Health Science Center		First Party (Primary)	-	-	
Header	~	INTERNATIONAL FORM	ON UNIVERSITY	×	Second Party (Primary)	Luis Cabello		

Finding Information on the Contract RECORD

Executed: In Eff	This contract	is in effect through	the end date of 9/7/2023 at 12:00 AM CD1.					Contract Actions 🐨
2019-000115	ALLER LANDON DATA	Attachmen	ts					View XXII; Hatery 7
OCA 2019-000118		Contract was	Aulty executed on \$/7/2018 and uploaded on 9/7/20	218.				
Туре:		A Fully Execu	ted Contract (50 KB)					
2nd Party:	INTERNATIONAL FOREL	General III	Objesten D					
Oatec	9/7/2018 - 9/7/2023							
Version	Renewal 0. Amendment 0	-		Point with Toll				
Contract Request,	170428	Order .	Attachment ~	Contract =	Version -	Size -	Date Uploaded	-
Tetal Centract Val	lue (TCV)	1	& INTERNATIONAL FOREIGN UNIVERSITY OCA 2019-00011E.pdf	-	1	107 KB	9/7/2018 9-4009 AM	Actions 🎔
Vew Contract								Download

NEED HELP MORE WITH THIS TOPIC?



UNTS Office of Procurement, Office of Contract Administration Department Email: <u>UNTScontractadmin@untsystem.edu</u>

HSC Internal webpage: <u>https://insite.unthsc.edu/division-of-finance/contract-administration/</u> UNTS OCA webpage: <u>https://finance.untsystem.edu/contract-administration/index.php</u>