



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.



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.



Figure 1

3. There are two ways to search, and which type to use depends on what you're looking for:

- Use [Simple Search](#) 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.

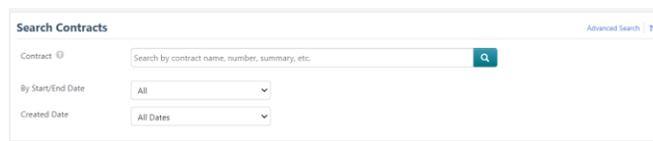


Figure 2

- Use [Advanced Search](#) 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.

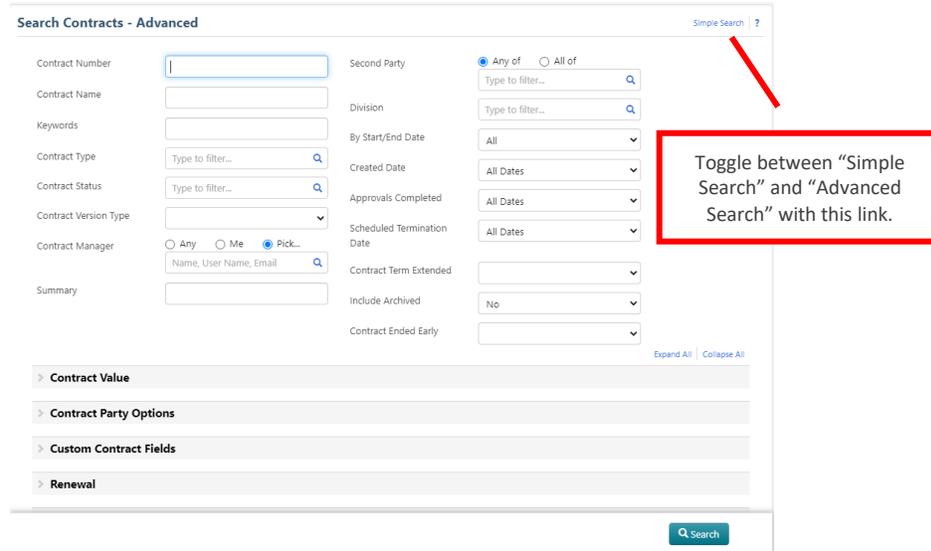


Figure 3

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 [Quick Reference Guide - Reports & Searches](#).

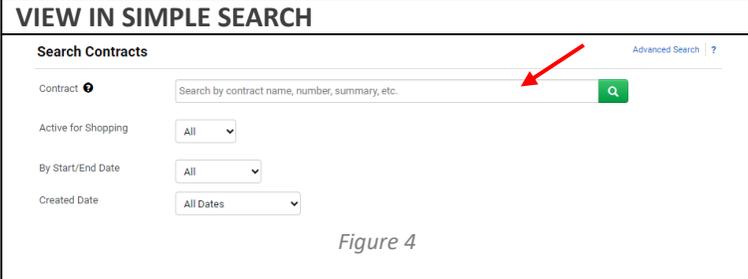
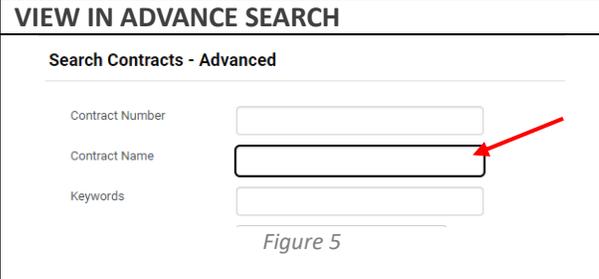
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For Contract Liaisons - Total Contract Manager (TCM) module

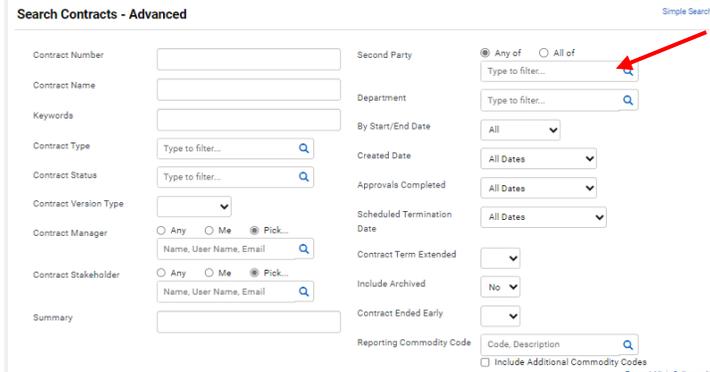


SUGGESTIONS FOR SEARCHING

4.  In UNTS Marketplace, you can search for the requisition # or the Vendor (external party) name in the “Contract Name” field

VIEW IN SIMPLE SEARCH	VIEW IN ADVANCE SEARCH
 <p>Search Contracts</p> <p>Contract <input type="text"/> Search by contract name, number, summary, etc. <input type="button" value="Q"/></p> <p>Active for Shopping <input type="button" value="All"/></p> <p>By Start/End Date <input type="button" value="All"/></p> <p>Created Date <input type="button" value="All Dates"/></p> <p>Figure 4</p>	 <p>Search Contracts - Advanced</p> <p>Contract Number <input type="text"/></p> <p>Contract Name <input type="text"/></p> <p>Keywords <input type="text"/></p> <p>Figure 5</p>

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



Search Contracts - Advanced

Contract Number

Contract Name

Keywords

Contract Type

Contract Status

Contract Version Type

Contract Manager Any Me Pick...

Contract Stakeholder Any Me Pick...

Summary

Second Party Any of All of

Department

By Start/End Date

Created Date

Approvals Completed

Scheduled Termination Date

Contract Term Extended

Include Archived

Contract Ended Early

Reporting Commodity Code

Include Additional Commodity Codes

Figure 6

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

-  In UNTS Marketplace, you can also use these steps if you submitted the Contract REQUEST.

Searching when YOU have submitted the Contract REQUEST

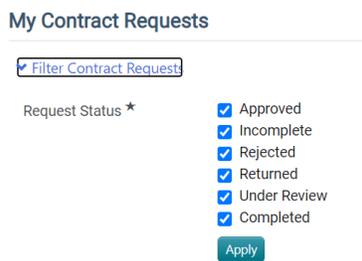
Step-by-Step

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:



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.

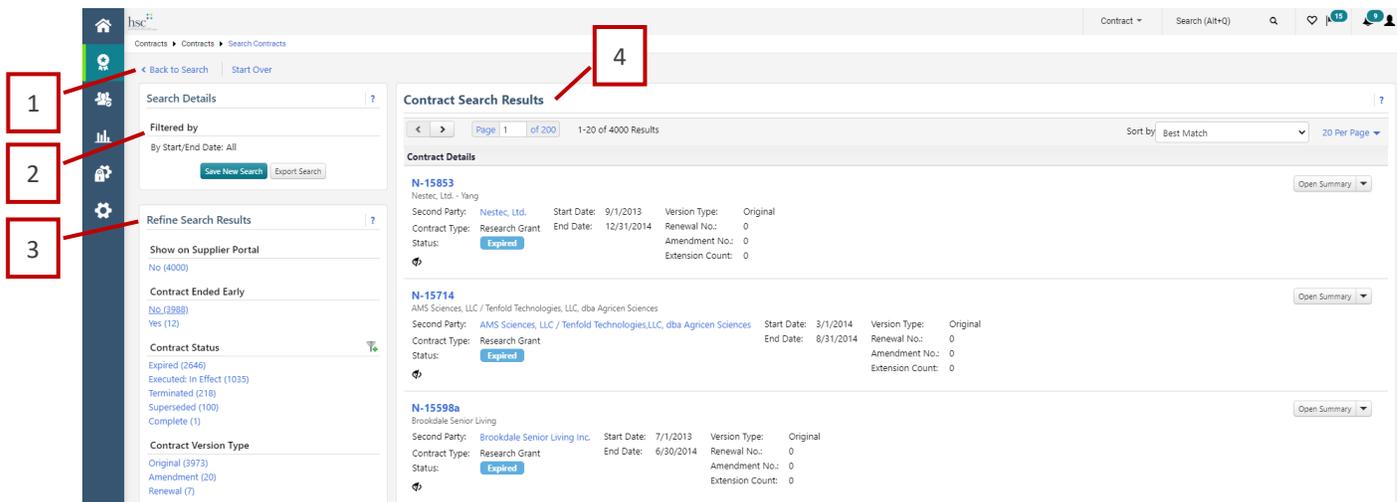


Figure 7

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



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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.



1	2	3	4
First step, the Buyer/Pcard team/Department Contract Liaison submit a CONTRACT REQUEST in TCM.	When OCA receives the Contract Request, OCA will review the Request and the contract. If there are no 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.	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:



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- 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.

Finding Information on the Contract RECORD

Status = Draft, Internal Review, External Review

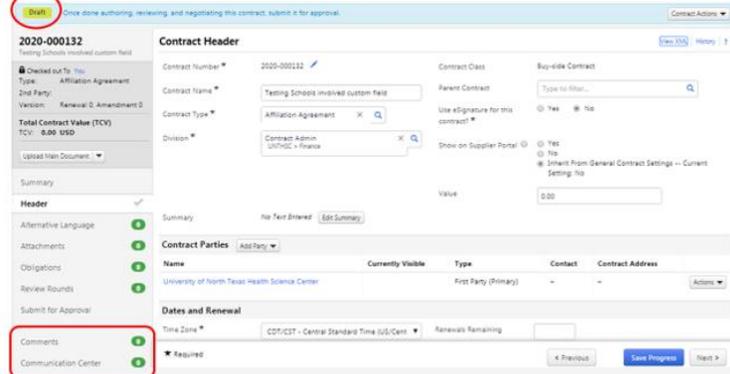


Figure 8

- 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
- 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.

Finding Information on the Contract RECORD

Status = Out for Signature

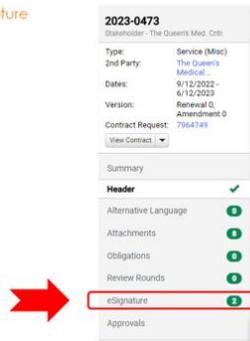


Figure 9

- To view if the signer has received, viewed, and/or signed the contract, check the  icon



Finding Information on the Contract RECORD

Status = Out for Signature

Order	Status	Name	Email
1	Sent	charlotte moore	cmoore1@tsu.edu
2	Created	Patrice Victor	Patrice.Victor@unthsc.edu

Figure 10

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

Finding Information on the Contract RECORD

Status = Executed

Name	Currently Visible	Type	Contact	Contract Address
University of North Texas Health Science Center		First Party (Primary)		
INTERNATIONAL FOREIGN UNIVERSITY	X	Second Party (Primary)	Luis Cabellero	

Finding Information on the Contract RECORD

Status = Executed

Print Order	Attachment	Print with Full Contract	Version	Size	Date Uploaded
1	INTERNATIONAL FOREIGN UNIVERSITY OCA 2019-000115.pdf		1	107 KB	9/7/2018 9:45:09 AM

NEED HELP MORE WITH THIS TOPIC?



Contact:

UNTS Office of Procurement, Office of Contract Administration
Department Email: UNTScontractadmin@untsystem.edu

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