

Review and Complete Procurement Contract

Navigation: Supplier Contracts > Create Contracts and Documents > Contract Entry
or Procurement Contracts > Add/Update Contracts
(either Navigation will work)

Must have a **Contract Creator** role to access the Procurement Contract

(Navigation from the [Go To Contract link](#) when converting requisition to contract will also work)

Contract Entry

Find an Existing Value | Add a New Value

SetID STATE

Contract ID CORENEXT

Style ID PO

Contract Process Option Purchase Order

Add

Find an Existing Value | Add a New Value

Click **Find an Existing Value**

Enter the **Contract ID**

Click **Search**

Favorites ▾ Main Menu ▾ > Procurement Contracts ▾ > Add/Update Contracts

Core-CT

My HR Finance Core-CT Help STARS

Contract Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

▼ Search Criteria

SetID = ▾ STATE x 🔍

Contract ID begins with ▾

Contract Version = ▾

Version Status = ▾

Contract Style begins with ▾ 🔍

Contract Process Option = ▾

Short Supplier Name begins with ▾ 🔍

Supplier Name begins with ▾ 🔍

Master Contract ID begins with ▾ 🔍

Description begins with ▾

Correct History Case Sensitive

Limit the number of results to (up to 300):

Basic Search 🔍 Save Search Criteria

Find an Existing Value | Add a New Value



Review and update any values as necessary for the particular contract

Below is a brief explanation of the fields created on the Contract

Field	Value
Status	Defaults to Open
Administrator/Buyer	Leave the Administrator/Buyer field blank
State Identified Contract Type	Defaults from the Requisition
Contract Style	Select PO
Supplier	Defaults from the Requisition
Begin Date	Defaults from the Requisition
Expire Date	Defaults from the Requisition
Supplier Contract Ref	Defaults from the Requisition
Description	Defaults from the Requisition
Maximum Amount	Defaults from the Requisition
Corporate Contract	If checked, the contract can be used Statewide Default is checked
Price Can be Changed on Order	If checked, the line amount may be modified on the purchase order Default is checked

Click the [PO Defaults](#) hyperlink

The screenshot displays the 'Contract Entry' page in the Core-CT system. The 'PO Defaults' link is highlighted with a red box. The page includes sections for 'Contract Version', 'Header', 'Amount Summary', and 'Order Contract Options'. The 'Order Contract Options' section contains several checkboxes, including 'Price Can Be Changed on Order' which is checked. The 'Contract Lines' section at the bottom shows a table with columns for Line, Item, Description, UOM, Category, and Status. The first line is active and shows 'Clinical Services' with a status of 'Active'.



Review and update any values as necessary for the particular contract

Field	Value
Business Unit	Defaults from the Requisition When the Corporate Contract checkbox is unchecked, this is the only Business Unit that can use this Contract. If more than one business unit is needed, click the + to add more.
Buyer	Defaults from the Requisition
Origin	Defaults from the Requisition

Click **OK**

Contract Defaults by BU
Help

Contract Entry

PO Defaults

SetID STATE Contract ID 18DOC76661PSA01 Version 1 Supplier ID 0000011046

Header Find | View All First 1 of 1 Last

*Business Unit Copy from BU Defaults

Supp Loc

Buyer DOC-Jones Karie

Origin

Currency

Payment Terms ID

Billing Location

Tax Exempt

Tax Exempt ID:

Shipping Information

Ship To Ship To Address

Location

IN Unit

Freight Terms

Ship Via

Charge By

AM Business Unit

Capitalize

Profile ID

Cost Type

Ultimate Use Code

Where Performed

Distributions Personalize | Find | View All

Distributions

*GL Unit	Fund	Dept	SID	Program	Account	ChartField 1	ChartField 2	Bud Ref	PC Bus Unit
STATE	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

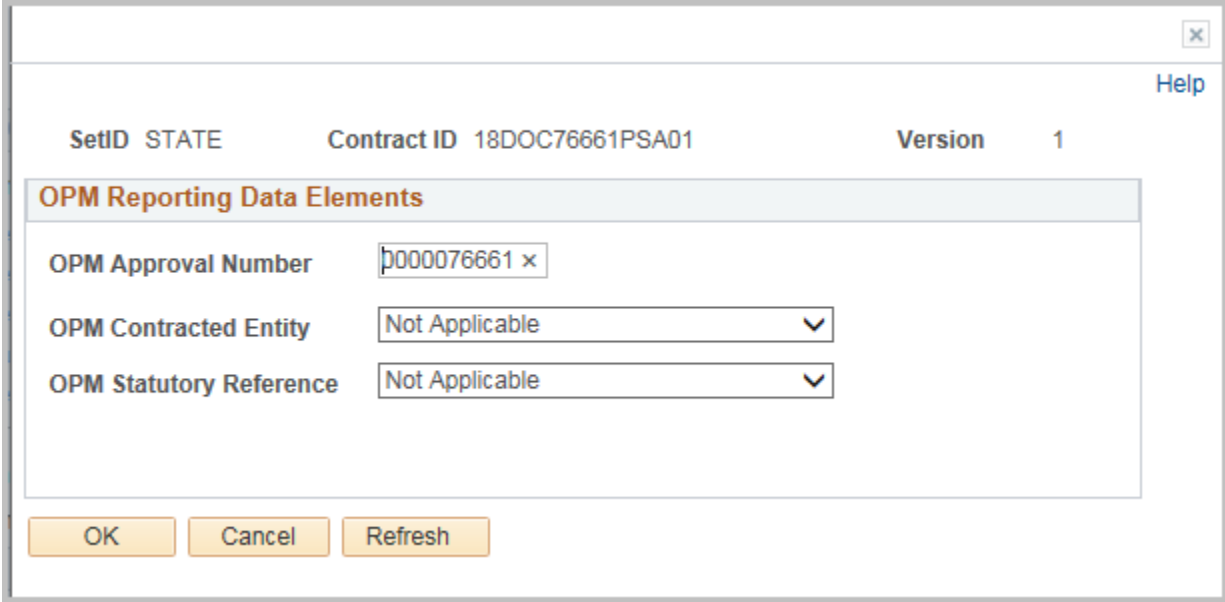
Add Comments

Click the [OPM Reporting Link](#)

The OPM Approval Number is the Requisition number and will copy over during conversion.

Update the OPM **Contracted Entity** and OPM **Statutory Reference** as needed.

Click **OK** (you will be returned to the Main Page of the Contract.)




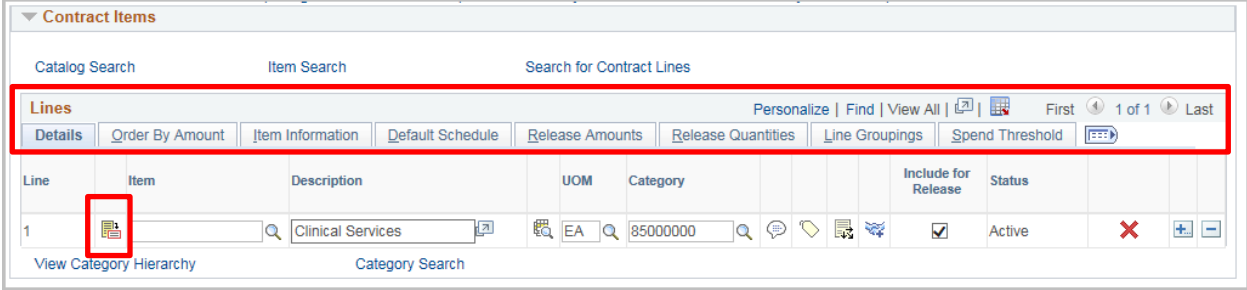
The screenshot shows a dialog box titled "OPM Reporting Data Elements" with a "Help" link in the top right. It contains the following fields:

- SetID STATE: (empty)
- Contract ID: 18DOC76661PSA01
- Version: 1
- OPM Approval Number: 000076661 x
- OPM Contracted Entity: Not Applicable (dropdown)
- OPM Statutory Reference: Not Applicable (dropdown)

At the bottom are three buttons: OK, Cancel, and Refresh.

The Contract Lines are defaulted from the Requisition

Click the Line Details Icon  to view Details for each line
 Alternately you can Click the **Tab(s)** across the Top to view specific fields displaying all lines



The screenshot shows the "Contract Items" section with search filters and a table of contract lines. A red box highlights the tabs: "Details", "Order By Amount", "Item Information", "Default Schedule", "Release Amounts", "Release Quantities", "Line Groupings", and "Spend Threshold". The "Details" tab is selected. Below the tabs is a table with columns: Line, Item, Description, UOM, Category, Include for Release, and Status. The first row shows Line 1, Item "Clinical Services", UOM "EA", and Category "85000000". A red box also highlights the "Line Details" icon in the Item column.

Field	Value
Physical Nature	This value is defaulted from the requisition
Maximum Line Amount	Enter the Maximum amount for the Line This is used to calculate the remaining balance
Price Can Be Changed on Order Amount Only	Default is Checked
	This defaults from the requisition

Details for Line 1
Help

Contract ID 18DOC76661PSA01 Version 1 Supplier 060836524F-001

Line 1 Item ID Clinical Services

Line Details

Category 85000000 ✗

Description Status Active

Category ID 00017 Physical Nature

Transaction Item Description:

Clinical Services ✎ ✎

237 characters remaining

Expand All Collapse All

Item Information

Supplier's Catalog Device Tracking

Supplier Item ID

Manufacturer ID

Description

Manufacturer's Item ID

GTIN

Release Amounts / Quantities

Minimum Line Amount <input type="text"/>	Minimum Line Quantity <input type="text"/>
Maximum Line Amount <input type="text"/>	Maximum Line Quantity <input type="text"/>
Total Line Released Amount 0.000	Total Line Released Quantity 0.00

Remaining Amount USD	Remaining Quantity 0.0000 EA
Remaining Amount %	Remaining Quantity % 0.00

Pricing Information

<input checked="" type="checkbox"/> Use Contract Base Price	<input type="checkbox"/> Use Supp Price UOM Adjustments
<input checked="" type="checkbox"/> Price Can Be Changed on Order	<input type="checkbox"/> Use Supplier Price Shipto Adj
Price Date <input type="text" value="Due Date"/>	Adjust <input type="text" value="Before Contract Adjustments"/>
Price Qty <input type="text" value="Line Quantity"/>	Order By Amount
Qty Type <input type="text" value="Current Order Quantity"/>	<input type="checkbox"/> Amount Only
	Merchandise Amount <input type="text" value="100000.00"/>

Schedule Defaults

Select the eligible UOM / Pricing combinations that are available for this contract line. The Release Default row will be used for pricing the next set of releases from the contract.

UOM/Pricing				Personalize Find View All <input type="button" value="Print"/> <input type="button" value="Refresh"/>
	Price Loc	UOM	Base Price	Curr
<input checked="" type="checkbox"/>	MAIN <input type="button" value="Q"/>	EA <input type="button" value="Q"/>	100000.00000	<input type="button" value="+"/> <input type="button" value="-"/>

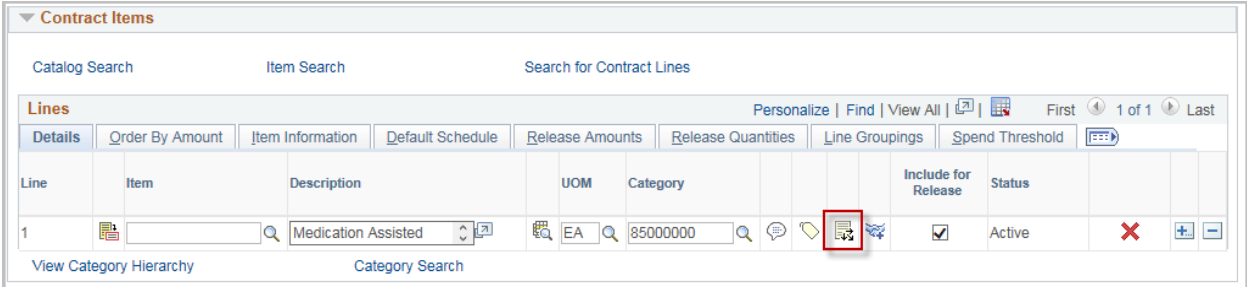
Enter the lead times and schedule quantities to be used for contract generated purchase order releases. Quantity is in standard UOM, and will be converted to the UOM that is selected as the Release Default at the time of release.

Shipping Template				Personalize Find View All <input type="button" value="Print"/> <input type="button" value="Refresh"/>
	Lead Time	Time Due	*Qty Sched	UOM
<input type="checkbox"/>	0		1.0000	EA



Click OK to return to the main page of the Contract

Click the PO Distribution Details icon 



Contract Items

Catalog Search Item Search Search for Contract Lines

Lines Personalize | Find | View All | First 1 of 1 Last

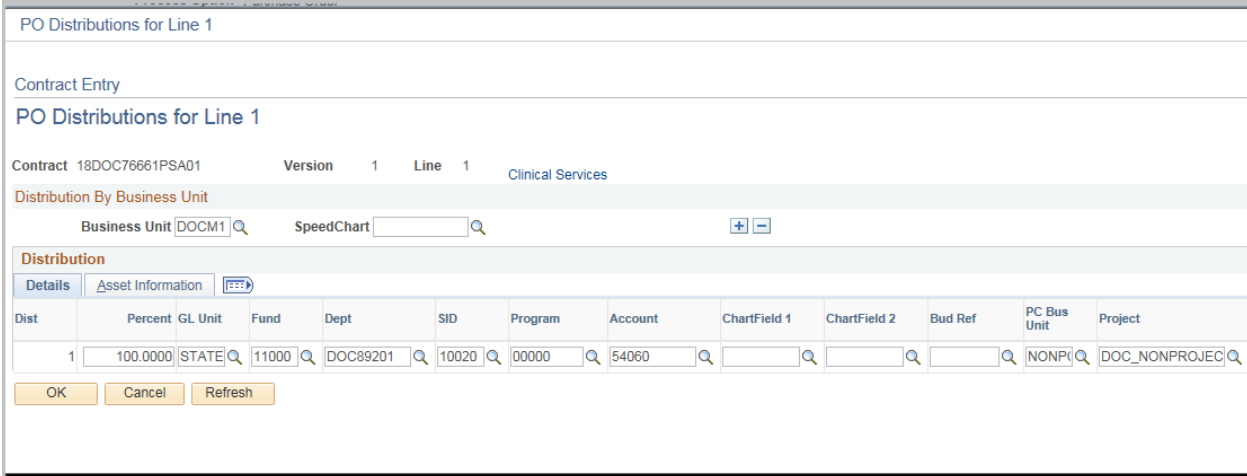
Details | Order By Amount | Item Information | Default Schedule | Release Amounts | Release Quantities | Line Groupings | Spend Threshold

Line	Item	Description	UOM	Category	Include for Release	Status
1		Medication Assisted	EA	85000000	<input checked="" type="checkbox"/>	Active

View Category Hierarchy Category Search

The PO Distributions are copied over from the Requisition

Click OK to return to the man contract page



PO Distributions for Line 1

Contract Entry

PO Distributions for Line 1

Contract 18DOC76661PSA01 Version 1 Line 1 Clinical Services

Distribution By Business Unit

Business Unit [DOC1] SpeedChart

Distribution

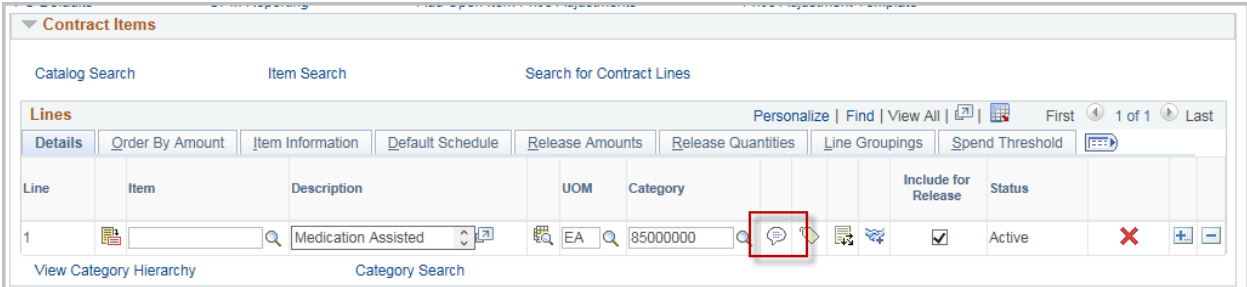
Details | Asset Information

Dist	Percent	GL Unit	Fund	Dept	SID	Program	Account	ChartField 1	ChartField 2	Bud Ref	PC Bus Unit	Project
1	100.0000	STATE	11000	DOC89201	10020	00000	54060				NONP	DOC_NONPROJEC

OK Cancel Refresh

Any Comments and Attachments will copy over from the Requisition

Click the comment bubble to view the comments/attachments



Contract Items

Catalog Search Item Search Search for Contract Lines

Lines Personalize | Find | View All | First 1 of 1 Last

Details | Order By Amount | Item Information | Default Schedule | Release Amounts | Release Quantities | Line Groupings | Spend Threshold

Line	Item	Description	UOM	Category	Include for Release	Status
1		Medication Assisted	EA	85000000	<input checked="" type="checkbox"/>	Active

View Category Hierarchy Category Search

You can see what requisition was used to create the contract in the comments for the line and can view the requisition Schedule and Distribution line summary page by clicking on the link.

Comments Find | View All First 1 of 1 Last

Use Standard Comments Comment Status Active Inactivate

Use Item Specifications

<<Start Date:2018-02-05>>

Send to Supplier
 Show at Receipt
 Copy to Purchase Order
 Show at Voucher

Associated Document

Attachment Attach View Delete Email

From -> REQ DOCM1-0000078255-1

OK Cancel Refresh

Click Cancel to return to the Comment page

req detail summary

Requisition Schedule and Distribution Help

Requisition Summary

Requisition Name	Requisition ID	Business Unit	Requester	Date	Status	Total Amount
CHR MAT HCC 2019	0000084691	DOCM1	124354	09/18/2018		0.00 USD

Line: DOC-Greene Michael B View All First 1 of 1 Last

Line	Item Description	Quantity	UOM	Item Price
1	Medication Assisted Therapy	1.0000	EA	51310.00000 USD

Schedule View All First 1 of 1 Last

Sched	Ship To	Due Date	Attention To	Quantity	Item Price	Merchandise Amount
1	1590000043	06/30/2019	DOC-Greene Michael B	1.0000	51,310.00000	51,310.00 USD

Distribution Personalize | First 1 of 1 Last

Dist #	Status	Location	Req Qty	Merchandise Amt	Percent	GL Unit	Entry Event	Fund	Dept	SID	Program	Account	Bud Ref
1	Complete	ACORE	1.0000	51,310.00	100.0000	STATE		12060	DOC88251	26342	25003	52740	2019

Cancel

Click OK to return to the main contract page.



Once the Supplier Contract process has begun the Procurement Contract will update with the corresponding Supplier Contract Status/Version/Amendment.

Until the Contract authored status is executed (i.e. the legal document is complete and signed off) the contract should remain in Open Status.

This will prevent creating purchase orders against the Contract.

Contract Entry
Contract

SetID STATE
Contract ID 18DOC76661PSA01
*Status Open
Administrator/Buyer
State Identified Contract Type PSC Competitive

Authored Document
Authored Status Dispatched Document Version 2.00 Amendment 0 [Maintain Document](#)

Header
*Contract Style Purchase Order
Process Option Purchase Order
*Supplier 060836524F-001
*Supplier ID 0000011046 CONTINUUM OF CARE INC
*Begin Date 01/25/2018
Expire Date 02/01/2020
Renewal Date 02/01/2020
Currency USD CRRNT
Primary Contact
Supplier Contract Ref 0000076661
Description DOCM1 0000076661
Master Contract ID
Tax Exempt ID
 Tax Exempt

Contract Version
Version 1 Status Current
Approved Date 01/30/2018

Amount Summary
Maximum Amount 100,000.00 USD
Line Item Released Amount 0.00
Category Released Amount 0.00
Open Item Released Amount 0.00
Non-PO PCard Transactions 0.00
Total Released Amount 0.00
Remaining Amount 100,000.00
Remaining Percent 100.00

Order Contract Options
 Allow Multicurrency PO
 Corporate Contract
 Lock Chartfields
 Allow Open Item Reference
 Adjust Supplier Pricing First
 Price Can Be Changed on Order
 Must Use Contract Rate Date
 Auto Default
Rate Date 01/19/2018

PO Defaults OPM Reporting Add Open Item Price Adjustments Price Adjustment Template

Contract Items
Catalog Search Item Search Search for Contract Lines

Update the Contract Status to Approved once the Supplier contract portion is completed

Security Note: User must have the **Approve Contracts** check box checked in their User Preferences in order to Approve contracts



The following message may display

Message

The Document has been generated on 2018-01-18-13.53.24.000000 that is earlier than the Last Modified 2018-01-18-13.54.47.000000 on the transaction. (10430,42)

The last modified of Authored Document is earlier than the Last Date Time stamp on the Contract Transaction. Refresh or regenerate the document if necessary.

OK

Click OK and Save the Contract

Purchase Orders may now be created using this contract.

Favorites Main Menu Procurement Contracts Add/Update Contracts

Core-CT All Search Advanced Search Last Search Results

Contract

Contract Entry Contract

SetID STATE Contract ID 18DOC76661PSA01 Contract Version Version 1 Status Current Approved Date 01/30/2018

*Status Approved

Administrator/Buyer State Identified Contract Type PSC Competitive

Authored Document

Authored Status Executed Document Version 2.00 Amendment 0 Maintain Document

Header

Contract Style Purchase Order Add Comments Activity Log
 Process Option Purchase Order Contract Activities Document Status
 Supplier 060836524F-001 Primary Contact Info Thresholds & Notifications
 Supplier ID 0000011046 CONTINUUM OF CARE INC Contract Header Agreement View Changes
 Contract Releases Current Change Reason
 Custom Fields

Begin Date 01/25/2018
 Expire Date 02/01/2020
 Renewal Date 02/01/2020

Currency USD CRRNT

Primary Contact

Supplier Contract Ref 0000076661
 Description DOCM1 0000076661

Master Contract ID

Tax Exempt ID Tax Exempt

Amount Summary

Maximum Amount	100,000.00	USD
Line Item Released Amount	0.00	
Category Released Amount	0.00	
Open Item Released Amount	0.00	
Non-PO PCard Transactions	0.00	
Total Released Amount	0.00	
Remaining Amount	100,000.00	
Remaining Percent	100.00	

Order Contract Options

Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date Rate Date 01/19/2018
 Corporate Contract Adjust Supplier Pricing First Auto Default
 Lock Chartfields Price Can Be Changed on Order

PO Defaults OPM Reporting Add Open Item Price Adjustments Price Adjustment Template

Contract Items

Catalog Search Item Search Search for Contract Lines

Lines Personalize Find View All First 1 of 1 Last

Line	Item	Description	UOM	Category	Include for Release	Status
1		Clinical Services	EA	85000000	<input checked="" type="checkbox"/>	Active