
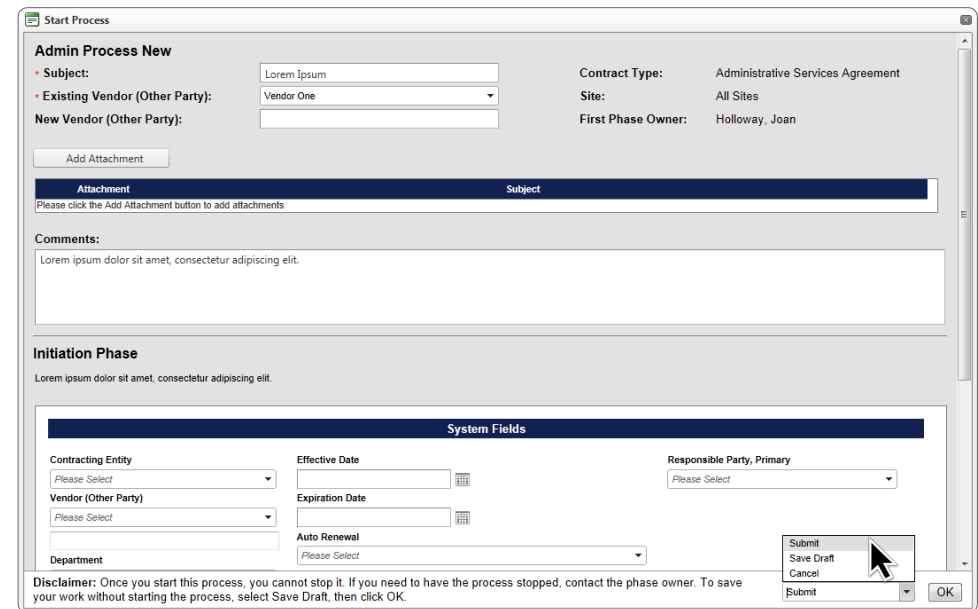


Initiating a Process

- ◆ Log into the database, then click on Take Action in the module ribbon.
- ◆ Select the following items:
 - ◆ Action Type
 - ◆ Organization
 - ◆ Contract Type
 - ◆ Site***Site may not apply.*
- ◆ Click the Start button.
The Start Process popup will appear.
- ◆ REQUIRED: Enter the subject and select the vendor.
- ◆ If applicable, add an attachment.
Depending on your database settings, this feature may be required, optional or unavailable. Contact your system administrator for details.
- ◆ OPTIONAL: Enter any comments.
- ◆ If applicable, enter or select values in the system and custom fields.
- ◆ In the bottom right corner, select an action, then click the OK button.
 - ◆ Select Submit (default) to start the process.
If you do not have access to the next phase, a confirmation popup will appear.
 - ◆ *If you have access to the next phase, the process page will appear.*
 - ◆ Select Save Draft to save the process for later.
You'll be able to access it in Process Drafts in the navigation pane.
 - ◆ Select Cancel to discard the process.

Quick Tip

Once you submit a process, it cannot be stopped. If you need to have a process stopped, contact the phase owner.

Adding Attachments

- ◆ In the Start Process popup or the process page, click the Add Attachment button.
- ◆ Enter the attachment subject.
 - ◆ To delete the attachment, click the ✖.
- ◆ Click the Browse button to browse for an attachment.
- ◆ In the dialogue, select the appropriate file, then click the Open button.
 - ◆ To remove the file, click the ✖ Remove icon.

Adding Comments

- ◆ On the process page, enter your comment in the comment box.
- ◆ If applicable, select users who should be notified by email of your comment.
- ◆ Click the Save button.
 - ◆ *You comment will be saved in the comment history.*

Quick Tips

- Your comments will be visible to anyone with access to the process.
- You cannot edit or remove comments after saving them.
- To view a list of all comments in a separate window, click the View All button.

Adding Reviewers/Approvers

- ◆ In the process page, click the Add Reviewer(s)/Approver(s) button.
- ◆ In the popup, select the reviewers and/or approvers you'd like to add.
- ◆ If desired, edit the settings for each field:
 - ◆ To make the fields editable to the selected reviewer, select Edit.
 - ◆ *This is the default setting.*
 - ◆ To make the fields read-only to the selected reviewer, select Read Only.
 - ◆ To hide the fields from the selected reviewer, select Hidden.
 - ◆ To require that the fields be populated, check the Required checkbox.
- ◆ When finished, click the Save button.
- ◆ *The reviewers and approvers you added will appear in the reviewers list.*
- ◆ To delete a reviewer from the list, click the ✖.
- ◆ To move a reviewer up or down in the list, click one of the gray arrows.
- ◆ To edit a reviewer, click the ✎ icon.

*You can only edit or delete reviewer/approvers who have not yet completed their reviews.

Form Phase - Pending

Phase Owner: Holloway, Joan

Start Date: - End Date: -

Review Type: Route Document To Reviewers Sequentially

Time Limit Type: No Time Limit [Stay With Current Reviewer] Time Limit Delay: -

	Order	Type	User	Start Date	End Date	Days in Progress	Status
✖	1	Reviewer	Campbell, Pete	-	-	-	Pending
✖	2	Reviewer	Olson, Peggy	-	-	-	Pending

Reviewer(s):

Approver(s):

Type	User
Approver	Draper, Don

Fields	Edit	Read Only	Hidden	Required
CF A	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
CF B	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
CF C	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
CF D	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>

System Fields	Edit	Read Only	Hidden	Required
Auto Renewal	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>

	Order	Type	User	Start Date	End Date	Days in Progress	Status
✖	1	Reviewer	Campbell, Pete	-	-	-	Pending
✖	2	Reviewer	Olson, Peggy	-	-	-	Pending
✖	3	Approver	Draper, Don	-	-	-	Pending

Editing Fields

This can be done in the form, initiation and activation phases.

- ◆ Click the Edit button.
 - ◆ Scroll down to the System Fields section and edit as needed.
 - ◆ When finished, click the Save button.
- OR**
- ◆ To cancel without saving your changes, click the Cancel button.

Admin Process New Preview Process

Process Subject: Lorem Ipsum	Document ID: 16	
Action Type: New	Contract Type: Administrative Services Agreement	
Initiator: Cosgrove, Ken	Status: In Progress	Site: All Sites
Start Date: 9/24/2014		

Attachments

Add Attachment

Attachment	Subject	Created	Last Modified	Modified By

Form Phase - Pending Previous

Edit

Reject

Retract

Submit for Review

Comment:

Save

Phase Owner: Holloway, Joan
 Start Date: - End Date: -
 Review Type: Route Document To Reviewers Sequentially
 Time Limit Type: No Time Limit [Stay With Current Reviewer] Time Limit Delay: -

Add Reviewer(s)/Approver(s)

Order	Reviewer	Review Start	Review Complete	Days in Review	Status		
✖	✎	1	Campbell, Pete	-	-	-	Pending
✖	✎	2	Olson, Peggy	-	-	-	Pending

Admin Form
 Lorem ipsum dolor sit amet, consectetur adipiscing elit.

System Fields

Contracting Entity	Effective Date	Responsible Party, Primary
TW Memorial Corporate Offices	10/1/2014	Calvet, Megan
Vendor (Other Party)	Expiration Date	
Vendor One	10/1/2016	
Department	Auto Renewal	
Administration	Yes	

Comment History:
 Holloway, Joan 9/25/2014
 Qusque commodo mi ac ultricies aliquet.
 Cosgrove, Ken 9/24/2014
 Lorem ipsum dolor sit amet, consectetur adipiscing elit.

View All

Admin Form
 Lorem ipsum dolor sit amet, consectetur adipiscing elit.

System Fields

Contracting Entity	Effective Date	Responsible Party, Primary
Please Select		Please Select
Vendor (Other Party)	Expiration Date	
Vendor One		
Department	Auto Renewal	
Please Select	Please Select	
	Signatory Name	
	Signatory Title	

Morbi hendrerit, turpis eget ullamcorper iaculis, ligula lacus pulvinar lectus, eu porttitor diam turpis eget orci.

CF 1:
 CF 2:
 CF 3:

Initiation Phase

- ◆ On the process page, add any attachments.
- ◆ Add any reviewers or approvers.
- ◆ Add any comments.
- ◆ Edit any fields.
- ◆ IF APPLICABLE: To submit the phase for review, click the Submit for Review button. *If a reviewer declines a phase, you can make changes and resubmit for review or you can approve the phase and move on to the next phase.*
- ◆ While the document is in review:
 - ◆ To recall the document from review, click the Recall Review button.
- ◆ To approve and go to the next phase, click the Approve Phase button. *The phase can be approved if all reviews are complete or if the phase has no reviewers.*
- ◆ To reject the process, click the Reject button. *Upon rejection, you can revive and resubmit the phase.*

Form Phase

- ◆ On the process page, add any attachments.
- ◆ Add any reviewers or approvers.
- ◆ Add any comments.
- ◆ Edit any fields.
- ◆ IF APPLICABLE: To submit the phase for review, click the Submit for Review button. *If a reviewer declines a phase, you can make changes and resubmit for review or you can approve the phase and move on to the next phase.*
- ◆ To retract to the previous phase, click the Retract button. *This button is only available if the current phase is in pending status and the previous phase has been approved.*
- ◆ While the document is in review:
 - ◆ To recall the document from review, click the Recall Review button.
- ◆ To approve and go to the next phase, click the Approve Phase button. *The phase can be approved if all reviews are complete or if the phase has no reviewers.*
- ◆ To reject the process, click the Reject button. *Upon rejection, you can revive and resubmit the phase.*

Admin Process New Preview Process

Process Subject: Lorem Ipsum Document ID: 16
 Action Type: New
 Initiator: Cosgrove, Ken Contract Type: Administrative Services Agreement
 Status: In Progress Site: All Sites
 Start Date: 9/24/2014

Attachments

Add Attachment

Attachment	Subject	Created	Last Modified	Modified By

Initiation Phase - Pending

Phase Owner: Holloway, Joan Reject Approve Phase Comment:

Start Date: 9/24/2014 End Date: - Save

Review Type: Route Document To Reviewers Sequentially
 Time Limit Type: CE-Mail Notice [Stay With Current Reviewer] Time Limit Delay: 3 Days

Add Reviewer(s)/Approver(s)

Comment History:
 Cosgrove, Ken 9/24/2014
 Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Affiliation Process New

Form Phase - Pending Previous

Edit Reject Retract Submit for Review Comment:

Phase Owner: Holloway, Joan

Start Date: - End Date: - Save

Review Type: Route Document To Reviewers Sequentially
 Time Limit Type: No Time Limit [Stay With Current Reviewer] Time Limit Delay: -

Add Reviewer(s)/Approver(s)

Order	Type	User	Start Date	End Date	Days in Progress	Status
1	Reviewer	Campbell, Pete	-	-	-	Pending
2	Reviewer	Olson, Peggy	-	-	-	Pending

Comment History:

Form Phase - Completed Previous

Edit Reject Approve Phase Comment:

Phase Owner: Holloway, Joan

Start Date: 9/29/2014 End Date: - Save

Review Type: Route Document To Reviewers Sequentially
 Time Limit Type: No Time Limit [Stay With Current Reviewer] Time Limit Delay: -

Add Reviewer(s)/Approver(s)

Order	Type	User	Start Date	End Date	Days in Progress	Status
1	Reviewer	Campbell, Pete	9/29/2014	9/29/2014	0	Submitted
2	Reviewer	Olson, Peggy	9/29/2014	9/29/2014	0	Submitted

Comment History:

Form Phase - In Progress Previous

Edit Reject Recall Review Forward: * Olson, Peggy Forward

Phase Owner: Holloway, Joan

Start Date: 9/29/2014 End Date: - Comment:

Review Type: Route Document To Reviewers Sequentially
 Time Limit Type: No Time Limit Time Limit Delay: -

Document Source Phase

- ◆ In the document source dropdown, select the document source.
This may be predetermined.
- ◆ To edit the document, simply click inside the document and type as you would in a Word document.
- ◆ To insert a clause from the approved language library, click in the place you want to insert the clause, then double-click on the clause name in the approved language list.
To see clause text before inserting, hover the mouse cursor over the clause name.
- ◆ To insert a field value, click in the place you want to insert the field, then double-click the field.
- ◆ Enter any comments.
- ◆ When finished editing, click the Approve phase button to go to the next phase.
 - ◆ To stop the process, click the Reject button.
 - ◆ To retract the document and return to the previous phase, click the Retract button.

The screenshot shows the 'Document Source Phase' interface. The main window displays a document titled 'docphase-template-14.doc' on page 1 of 6. The document content includes a title 'SAMPLE COMPANY SERVICE AGREEMENT - COMPANY' and several paragraphs of text, including a 'RECITALS' section. The sidebar on the right contains an 'Approved Language' section with a table of field values. A mouse cursor is hovering over the 'Vendor One' field value.

Field Name	Field Value
{Auto Renewal}	Yes
{Contracting Entity}	TW Memorial Corporate Offices
{Department}	Administration
{Effective Date}	10/1/2014
{Expiration Date}	10/1/2016
{Responsible Party, Primary}	Calvet, Megan
{Signatory Name}	
{Signatory Title}	
{Vendor (Other Party)}	Vendor One

The screenshot shows the 'Document Source Phase' interface on page 2 of 5. The document content includes a paragraph of text and a section titled 'Confidential Information - physician use'. The sidebar on the right contains an 'Approved Language' section with a table of field values. A mouse cursor is hovering over the 'Confidential Information - physician use' field value.

Field Name	Field Value
Confidential Information - physician use	
Employee Solicitation/Hiring	
A. All information relating to Client that is known to be confidential or proprietary, or which is clearly marked as such, shall be held in confidence by Consultant and shall not be disclosed or used by Consultant except to the extent that such disclosure or use is reasonably necessary to the performance of Consultant's Work.	
B. All information relating to Consultant that is known to be confidential or proprietary, or which is clearly marked as such, shall be held in confidence by Client and shall not be disclosed or used by Client except to the extent that such disclosure or use is reasonable.	

Document Review Phase

- ◆ If needed, add any reviewers or approvers.
- ◆ To submit the phase for review, click the Submit for Review button.
OR
- ◆ To retract to the previous phase, click the Retract button.
OR
- ◆ To reject the process, click the Reject button.
- ◆ While the document is in review:
 - ◆ To recall the document from review, click the Recall Review button.
 - ◆ To reject the process, click the Reject button.
- ◆ Once all reviews have been submitted:
 - ◆ To approve and go to the next phase, click the Approve Phase button.
 - ◆ To reject the process, click the Reject button.

Admin Process New

Attachments

Document Review Phase - Pending

Phase Owner: Holloway, Joan

Start Date: 9/29/2014 End Date: -

Review Type: Route Document To Reviewers Sequentially
Time Limit Type: CE-Mail Notice (Stay With Current Reviewer) Time Limit Delay: 2 Days

Order	Type	User	Start Date	End Date	Days in Progress	Status
0	Reviewer	Campbell, Pete	-	-	-	Pending
1	Reviewer	Olson, Peggy	-	-	-	Pending

Approved Language
 Completed Forms
 Comments

Notify by email of my comment:

Phase Owner Reviewers
 Initiator System Users

Comment:

Attachments

Attachment	Subject	Created	Last Modified	Modified By
Document Versions				
process-workflow-1-18-1-8.doc	Phase Owner Assigned	9/29/2014	9/29/2014	sysadminhw1

Document Review Phase - In Progress

Phase Owner: Holloway, Joan

Start Date: 9/29/2014 End Date: -

Review Type: Route Document To Reviewers Sequentially
Time Limit Type: CE-Mail Notice (Stay With Current Reviewer) Time Limit Delay: 2 Days

Order	Type	User	Start Date	End Date	Days in Progress	Status
0	Reviewer	Campbell, Pete	9/29/2014	9/29/2014	0	Submitted
1	Reviewer	Olson, Peggy	9/29/2014	-	0	In Progress

Forward: * Campbell, Pete

Approved Language
 Completed Forms
 Comments

Notify by email of my comment:

Phase Owner Reviewers
 Initiator System Users

Attachments

Attachment	Subject	Created	Last Modified	Modified By
Document Versions				
process-workflow-1-18-1-8.doc	Phase Owner Assigned	9/29/2014	9/29/2014	sysadminhw1

Document Review Phase - Completed

Phase Owner: Holloway, Joan

Start Date: 9/29/2014 End Date: -

Review Type: Route Document To Reviewers Sequentially
Time Limit Type: CE-Mail Notice (Stay With Current Reviewer) Time Limit Delay: 2 Days

Order	Type	User	Start Date	End Date	Days in Progress	Status
0	Reviewer	Campbell, Pete	9/29/2014	9/29/2014	0	Submitted
1	Reviewer	Olson, Peggy	9/29/2014	9/29/2014	0	Submitted

Approved Language
 Completed Forms
 Comments


Notify by email of my comment:

Phase Owner Reviewers
 Initiator System Users

Comment:

Signatory Phase

Wet with Routing:

- ◆ If needed, add a signatory.
 - ◆ Click the Add/Edit Signatory button.
 - ◆ In the popup, select a signatory, then click the  icon.
 - ◆ To save the added signatory, click the Save button.
- ◆ To submit the document for signature(s), click the Submit for Signature button.
- ◆ To recall the document from routing for signatures, click the Recall Signatures button.
- ◆ To retract the document, click the Retract button.
This button is only available prior to submitting the document for signatures.
- ◆ To retract a particular version of the document to the previous phase, click the Retract by Document Version button. In the popup, select the document version you want to retract.
This button is only available in pending or completed status.
- ◆ To reject the process, click the Reject button.

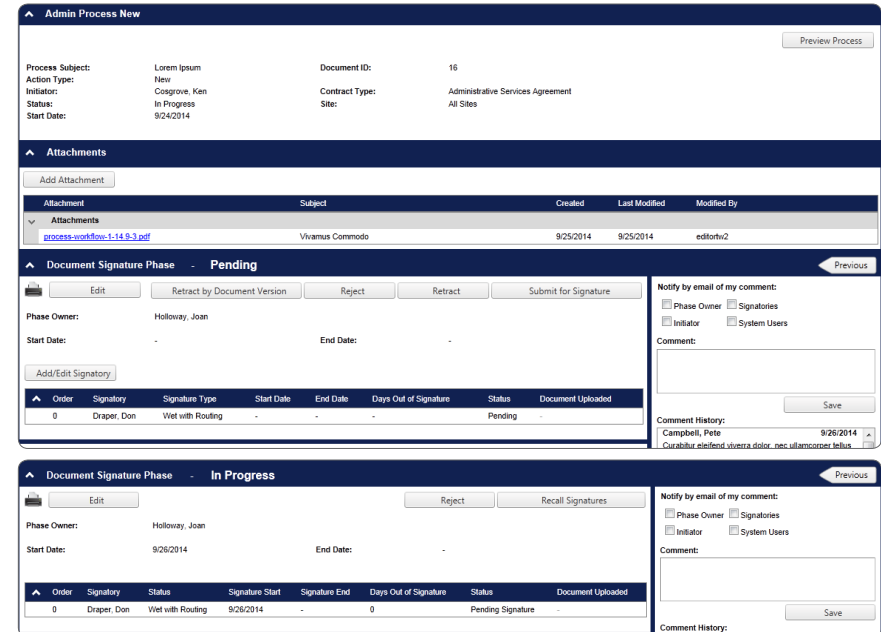
Wet without Routing

- ◆ To retract a particular version of the document to the previous phase, click the Retract by Document Version button. In the popup, select the document version you want to retract.
- ◆ To reject the process, click the Reject button.
- ◆ To download the current document version, click the Download Current Document button.
- ◆ To upload the signed document:
 - ◆ Click the Browse button, then select the appropriate document.
 - ◆ Click the Submit button.
- ◆ To approve and go to the next phase, click the Approve Phase button.

Quick Tip

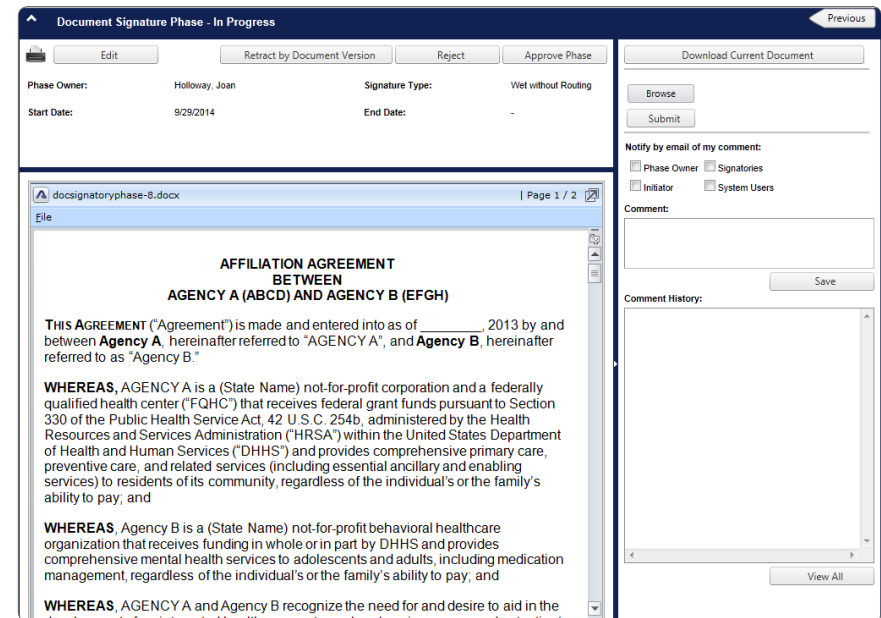
The phase owner can upload as many versions as needed.

Wet with Routing



The screenshot shows the 'Admin Process New' interface. It includes fields for Process Subject, Action Type, Initiator, Status, Start Date, Document ID, New, Cosgrove, Ken, In Progress, 9/24/2014, Contract Type, Site, Administrative Services Agreement, and All Sites. Below this is an 'Attachments' section with a table listing attachments like 'process-workflow-1-14-5-3.pdf'. The 'Document Signature Phase' is currently 'Pending'. Buttons for 'Retract by Document Version', 'Reject', 'Retract', and 'Submit for Signature' are visible. A table below shows the signature phase details for 'Draper, Don' with a status of 'Pending'. A second screenshot shows the 'In Progress' phase with a 'Recall Signatures' button and a table showing the signature phase for 'Draper, Don' with a status of 'Pending Signature'.

Wet without Routing



The screenshot shows the 'Document Signature Phase - In Progress' interface. It includes fields for Phase Owner, Signature Type, Start Date, and End Date. A 'Download Current Document' button is present. A document viewer shows a document titled 'docsignatoryphase-8.docx' with the following text:

**AFFILIATION AGREEMENT
BETWEEN
AGENCY A (ABCD) AND AGENCY B (EFGH)**

THIS AGREEMENT ("Agreement") is made and entered into as of _____, 2013 by and between **Agency A**, hereinafter referred to "AGENCY A", and **Agency B**, hereinafter referred to as "Agency B."

WHEREAS, AGENCY A is a (State Name) not-for-profit corporation and a federally qualified health center ("FQHC") that receives federal grant funds pursuant to Section 330 of the Public Health Service Act, 42 U.S.C. 254b, administered by the Health Resources and Services Administration ("HRSA") within the United States Department of Health and Human Services ("DHHS") and provides comprehensive primary care, preventive care, and related services (including essential ancillary and enabling services) to residents of its community, regardless of the individual's or the family's ability to pay; and

WHEREAS, Agency B is a (State Name) not-for-profit behavioral healthcare organization that receives funding in whole or in part by DHHS and provides comprehensive mental health services to adolescents and adults, including medication management, regardless of the individual's or the family's ability to pay; and

WHEREAS, AGENCY A and Agency B recognize the need for and desire to aid in the development of an integrated health care system which business operations are distributed

Activation Phase

- ◆ Edit any system or custom fields as needed.
Red asterisks indicate required fields.
- ◆ To save your changes, click the Save button.
- ◆ To push the document to Contract Library, click the Activate button.
A confirmation popup containing a hyperlink the new contract will appear.
 - ◆ To reject the phase, click the Reject button.
 - ◆ To retract the phase, click the Retract button.

Quick Tip

Once the contract is activated, any changes must be made in Contract Library.

Admin Process New

Process Subject: Lorem Ipsum Document ID: 16 [Preview Process](#)

Action Type: New

Initiator: Cosgrove, Ken Contract Type: Administrative Services Agreement

Status: In Progress Site: All Sites

Start Date: 9/24/2014

Attachments

[Add Attachment](#)

Attachment	Subject	Created	Last Modified	Modified By
process-workflow-1.14.9.3.pdf	Vivamus Commodo	9/25/2014	9/25/2014	editoriv2
process-workflow-1.14.-1.4.doc	Signatory Assigned	9/26/2014	9/26/2014	sysadminiv1
process-workflow-1.14.-1.5.doc	Signatory Assigned	9/26/2014	9/26/2014	sysadminiv2

Activation Phase - In Progress [Reject](#) [Retract](#) [Save](#) [Activate](#)

Phase Owner: Holloway, Joan

Start Date: 9/26/2014 End Date: -

Contract: [pc-1-18.doc](#)

System Fields

Vendor (Other Party): Vendor One

New Vendor (Other Party):

Entity: TW Memorial Corporate Offices

Department: Administration

Secondary (Other Party): Please Select

New Secondary (Other Party):

Effective Date: 10/1/2014

Expiration Date: 10/1/2016

Auto Renewal: Yes

Renewal Terms (Months): 0

Signatory Title:

Original Term:

Responsible Party, Primary: Calvet, Megan

Responsible Party, Secondary: Please Select

Responsible Party, Tertiary: Please Select

PO Number:

Other Signatory Name:

Other Signatory Title:

Contract CEmail Users: Bishop, Helen; Calvet, Megan; Campbell, Pete; Cosgrove, Ken

Compliance Questions

Does this contract require a Business Associate Agreement? Not Answered

Does this contract contain the Business Associate Agreement/language? Not Answered

Does this Vendor provide any clinical services to our patients? Not Answered

Comments

Notify by email of my comment: Initiator

Comment:

Save

Comment History:

Campbell, Pete 9/26/2014
Curabitur eleifend viverra dolor, nec ullamcorper tellus cursus sodales.

Olson, Peggy 9/25/2014
FORWARD: Aenean ullamcorper, dolor id rutrum

[View All](#)



Contract Summary Page

[Back](#) [Email](#) [Printer Friendly Page](#) [Edit](#)

Contract Number: [1004.24C](#)

Organization: TM Documentation

Contracting Entity: TW Memorial Corporate Offices

Vendor (Other Party): [Vendor One](#)

Vendor Evaluation Form: [Create New Evaluation Form](#)

Secondary (Other Parties): [Vendor Two](#)

Contract Type: Administrative Services Agreement

Sites: [TW Memorial Corporate Offices](#); [TW Memorial Hospital](#)

Department: Administration

Contract Expires In: 96 Days

[Cover Sheet](#) [Contract/Attachments](#) [Critical Dates](#) [Assets](#) [Compliance](#) [Custom Fields](#) [Explicit Access](#)