



Contract Administration is a Shared Service for the Following Legal Entities: 1) Stanford Health Care; 2) Lucile Salter Packard Children’s Hospital at Stanford (“Lucile Packard Children’s Hospital” or “Stanford Children’s Health”); 3) The Hospital Committee for the Livermore-Pleasanton Areas (“Stanford Health Care – ValleyCare”); 4) Stanford University Medical Network Risk Authority, LLC (“The Risk Authority”); 5) University HealthCare Alliance; 6) Packard Children’s Health Alliance; 7) Stanford Health Care Advantage; 8) Stanford Blood Center, LLC; 9) CareCounsel, LLC

TRAINING GUIDE – Running and Saving Contract Reports in MediTract

Description: Contract Administration categorizes fully signed contracts as either “Active” or “Archived”.

Active Contracts	Archived Contracts
<p>The contract is:</p> <ol style="list-style-type: none"> 1. current (not yet expired); 2. expired, but Contract Administration has not been told whether to renew or terminate the contract; 3. expired, but the Responsible Party is still operating under the terms of the Active contract; or 4. expired, but Contract Administration is working on renewing the contract. 	<p>The contract is:</p> <ol style="list-style-type: none"> 1. terminated via a termination notice sent to the Vendor; or 2. terminated at the end of the contract term and the Responsible Party has notified Contract Administration that the contract is no longer active; or 3. for a one-time purchase or event without extended warranty or without an accompanying Master Service Agreement.

Contract Administration stores fully signed Active Contracts in an online contract management database, called MediTract. Archived Contracts are stored on the Contract Administration shared drive.

This training guide outlines the steps involved in running and saving contract reports related to Active Contracts stored in MediTract.

1. Navigate to the Contract Management Database

- Navigate to www.meditract.com using Google Chrome (do not use Internet Explorer because the Report Writer feature does not function properly in Internet Explorer) and click on the “Secure Login” button on the upper right side of the screen as shown below:



2. Login to MediTract

- Insert your User Name and Password as shown below:

- To obtain a User Name and Password, contact ContractAdministration@stanfordhealthcare.org.

3. Select the Applicable MediTract Database

- a. The MediTract contract database is categorized into different “Organizations”:
- i. **Annual Contract Evaluations:** this organization contains “Vendor Evaluation Forms” that are used to evaluate Vendors annually in accordance with the requirements of the Centers for Medicare and Medicaid Services and The Joint Commission.
 - ii. **Contract Administration:** this organization contains Active Contracts that are not stored in another organization.
 - iii. **Office of the General Counsel:** this organization contains contracts involving the Stanford University School of Medicine and contracts involving physicians.
 - iv. **Stanford Health Care – ValleyCare: Physician Contracts:** this organization contains contracts with The Hospital Committee for the Livermore-Pleasanton Areas (“Stanford Health Care – ValleyCare”) involving a physician.
 - v. **TERMS:** this organization contains physician time records associated with physician administrative service contracts.
 - vi. **University HealthCare Alliance: Physician Contracts:** this organization contains contracts with University HealthCare Alliance involving a physician.
 - vii. **NOTE:** Archiving and storage of the following contracts are not handled by Contract Administration and these contracts are not stored in MediTract:
 1. Contracts involving Real Estate
 - I. For Stanford Health Care: Managed by Meredith Fondahl, Administrative Director of Real Estate, and not stored in MediTract.
 2. Contracts involving Planning, Design & Construction of New Buildings
 - I. For Stanford Health Care: Managed by Matt Pearson, Planning, Design & Construction, and not stored in MediTract.
- b. Select the applicable organization from the “Organization” list options and then click “Open”:

Select the organization you wish to access, then click the Open button.

Organization:

00 - Annual Contract Evaluation
Contract Administration 1
Office of the General Counsel
Stanford Health Care – Valley Care: Physician Contracts
University HealthCare Alliance: Physician Contracts

Open 2

4. Select "Report Writer"

- a. On the left side of the screen in the navigation pane, click on "Report Writer" and select "Custom Reports".

The screenshot displays the Stanford Contract Administration interface. At the top left is the Stanford Health Care logo and the text "Stanford Contract Administration". To the right of the logo is a disclaimer: "Contract Administration is a Shared Service for the Following Legal Entities: 1) Stanford Health Care; 2) Lucile Salter Packard Children's Hospital at Stanford ('Lucile Packard Children's Hospital' or 'Stanford Children's Health'); 3) The Hospital Committee for the Livermore-Pleasanton Areas ('Stanford Health Care - ValleyCare'); 4) Stanford University Medical Network Risk Authority, LLC ('The Risk Authority'); 5) University HealthCare Alliance; 6) Packard Children's Health Alliance; 7) Stanford Health Care Advantage; 8) Stanford Blood Center, LLC; 9) CareCounsel, LLC".

The main navigation pane on the left lists various options: Contract Search, Contract, Party, Location, Dates, Calendar View, Action List, Status, Compliance, Report Writer (highlighted with a red box and a yellow arrow labeled '1'), Standard Reports, Custom Reports (highlighted with a yellow box and a yellow arrow labeled '2'), Open Saved Report, Expense Reports, Revenue Reports, TM Auto Reports, Directory, Add Documents, Administration, Training Materials, External Links, and Database Classifications.

The main content area is titled "Contract Search Page" and contains a "Contract Search" form. The form includes fields for Contracting Entity, Site, Department, Contract Type, Vendor (Other Party), and Status. The Status field has checkboxes for Archived, Current (checked), and Expired (checked). Below these are several dropdown menus for filtering, a "Vendor (Other Party)" field, and "Search" and "Clear Criteria" buttons.

At the bottom of the form is a "Contract Search Options" section with fields for "Return A Maximum Of:" (set to 1000), "Full Text Option:" (set to Contract Data Only), and "Database(s) Option:" (set to Contract Administration, Office of General Counsel, Stan...).

5. Choose the Criteria

- a. Select the specific fields from the “Available Fields” list that should be included in the report (e.g., Vendor Other Party, Contracting Entity, Department, Cost Center Number, Contract Number, Contract Type, Contract Description, Effective Date, Expiration Date, Status, Primary Responsible Party, Secondary Responsible Party, etc.). To move the “Available Fields” to the “Selected Fields” list:
- Double click on the field; or
 - Select the field and then click the “Add” button.

The screenshot shows the 'Custom Report Writer' interface. At the top, it says 'Please select from the list below the information that you would like to be represented on this custom report.' Below this are two lists: 'Available Fields' and 'Selected Fields'. The 'Available Fields' list includes items like 'Total Value', 'Accreditation Standards 1', 'Contracting Entity', etc. The 'Selected Fields' list includes 'Vendor Other Party', 'Contracting Entity', 'Department', etc. A yellow arrow labeled '1' points to the 'Contracting Entity' field in the 'Available Fields' list. Another yellow arrow labeled '2' points to the 'Add >' button between the two lists. A 'Next' button is visible at the bottom right.

- The field selected will appear in the “Selected Fields”.
- b. To remove fields from the “Selected Fields” list:
- Double-click the information line entered in the Selected Field; or
 - Select the information line entered and click the “Remove” button.

The screenshot shows the 'Custom Report Writer' interface. The 'Available Fields' list is on the left, and the 'Selected Fields' list is on the right. The 'Selected Fields' list currently contains 'Responsible Party, Primary Title'. A yellow arrow labeled '1' points to this entry in the 'Selected Fields' list. A yellow arrow labeled '2' points to the 'Remove' button between the two lists. A 'Next' button is visible at the bottom right.

- c. When done, click the “Next” button at the bottom displayed below:

Next

6. Limit the Search Criteria

- a. The Custom Report will include every contract contained in the database unless you ADD additional limiting criteria. In order to do that:
 - i. select from the drop-down list the criteria to limit the list of results in the “Limiting Criteria” window, on the left side of the “Custom Report Writer” page;
 - ii. select the instruction in the “User Instruction” box;
 - iii. enter the applicable “Limiting Value” in the right side;
 - iv. e.g., one limiting criteria might be “Expiration Date”, and the “User Instruction” might be “Is Equal To 4/17/2017”. **Quick Tip:** to filter limiting criteria, start typing in the limiting criteria field;
 - v. finally, click the “Add Criteria” button.

The screenshot shows the 'Custom Report Writer' interface. At the top, there is a title bar and a descriptive paragraph: 'The Custom Report that you are building will include every contract contained in this database that you are authorized to view, unless you ADD additional limiting criteria. The limiting criteria is listed on the left hand side and your instructions are listed on the right hand side. For example, one limiting criteria might be Expiration Date, and your User Instruction might be Is Equal To 12/31/2009. When you are finished adding your limiting criteria, click the NEXT button to move to the next step.'

The main area is divided into three sections:

- Limiting Criteria:** A dropdown menu with 'Expiration Date' selected. A yellow arrow labeled '1' points to this dropdown.
- User Instruction:** A dropdown menu with 'Is Equal To' selected. A yellow arrow labeled '2' points to this dropdown.
- Limiting Value:** A text input field containing '4/17/2017'. A yellow arrow labeled '3' points to this field. Below it is a list of dates: '4/16/2017 12:00:00', '4/17/2017 12:00:00 AM', '4/18/2017 12:00:00 AM', and '4/19/2017 12:00:00 AM'. A yellow arrow labeled '4' points to this list.

An 'Add Criteria' button is located at the bottom right of the form.

- b. Click the “Next” button displayed below:

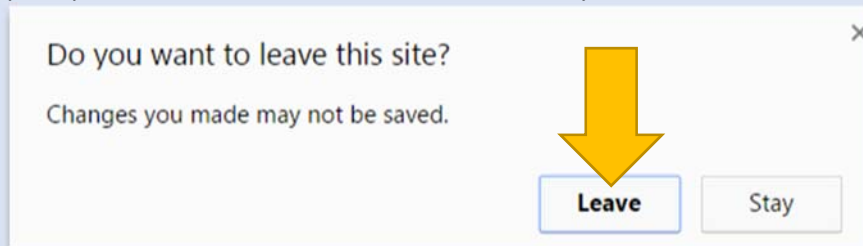
Next

7. Prepare the Report

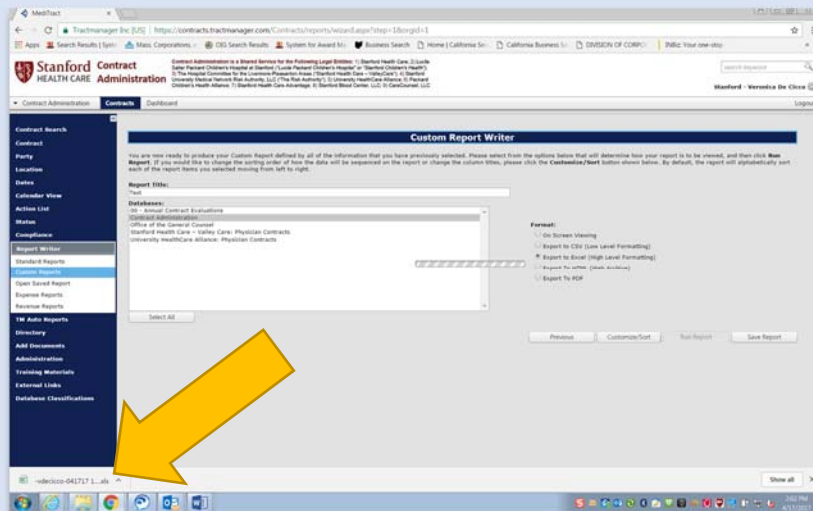
- Edit the report title.
- Select the report format: preferably select the "Export to Excel" option.
- To run the report, click the Run Report button.

The screenshot shows the 'Custom Report Writer' interface. A yellow arrow labeled '1' points to the 'Report Title' field, which contains 'My Custom Report'. Another yellow arrow labeled '2' points to the 'Databases' dropdown menu, which is open and shows several options: '00 - Annual Contract Evaluations', 'Contract Administration', 'Office of the General Counsel', 'Stanford Health Care - Valley Care: Physician Contracts', and 'University HealthCare Alliance: Physician Contracts'. A third yellow arrow labeled '3' points to the 'Run Report' button at the bottom right. The 'Format' section on the right has radio buttons for 'On Screen Viewing', 'Export to CSV (Low Level Formatting)', 'Export to Excel (High Level Formatting)', 'Export To HTML (Web Archive)', and 'Export To PDF'. The 'Export to Excel' option is selected. At the bottom, there are buttons for 'Previous', 'Customize/Sort', 'Run Report', and 'Save Report'.

- When prompted, select the "Leave" button in the "Do you want to leave this site?" page.

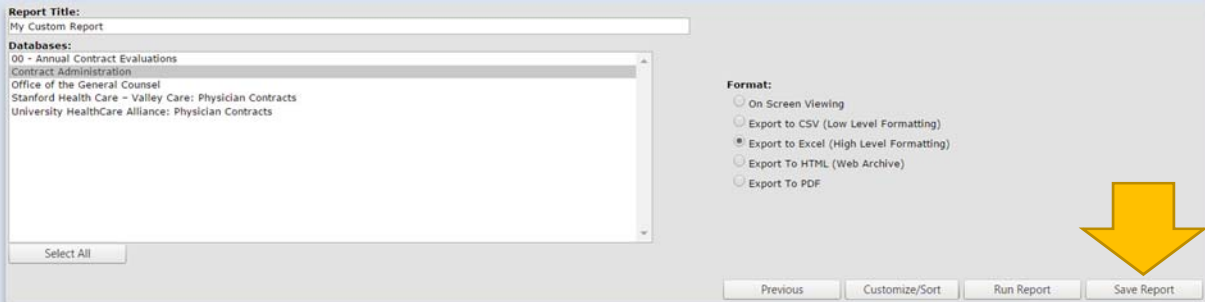


- The Report has been generated with the criterion selected and an Excel file icon will appear at the bottom left side of the screen. Click on the Excel file icon to open the Contract Report.



8. Save the Contract Report

- a. In order to save a generated Contract Report, once the “Limiting Criteria” have been entered, the “Report Title” has been entered and the “Format” has been chosen:
- i. Click the “Save Report” button at the right bottom of the screen.



The screenshot shows the 'Custom Report Writer' interface. At the top, there is a 'Report Title' field containing 'My Custom Report'. Below it is a 'Databases' list with a 'Select All' button. To the right, the 'Format' section has radio buttons for 'On Screen Viewing', 'Export to CSV (Low Level Formatting)', 'Export to Excel (High Level Formatting)' (which is selected), 'Export To HTML (Web Archive)', and 'Export To PDF'. At the bottom right, a yellow arrow points to the 'Save Report' button. Other buttons at the bottom include 'Previous', 'Customize/Sort', and 'Run Report'.

- b. Enter the description of the Contract Report to save in the “Description” box and then click the “Save” button.



The screenshot shows the 'Custom Report Writer' interface. The 'Report Title' field contains 'Test'. The 'Description' field contains 'Report for contracts belonging to Cost Center number XXXXX'. A yellow arrow labeled '1' points to the 'Description' field. Another yellow arrow labeled '2' points to the 'Save' button at the bottom right. There is also a 'Cancel' button next to it. A 'Share Report' checkbox is visible at the bottom left.

For additional assistance, please email ContractAdministration@stanfordhealthcare.org.