Contract Administration

Stanford HEALTH CARE

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
The contract is: 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.	The contract is: 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at the end of the contract term and the Responsible Party has notified Contract Administration that the contract is no longer active; or 3.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.

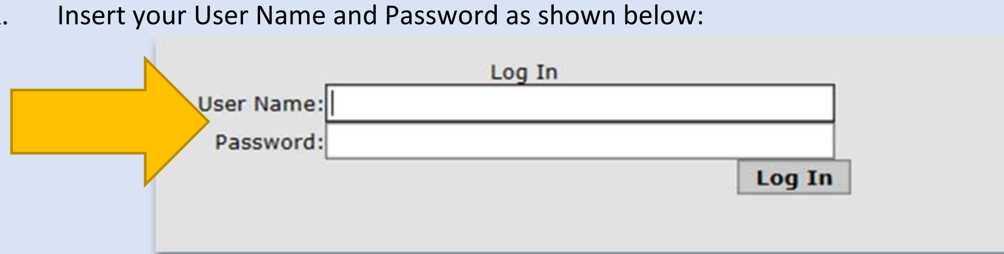
This training guide outlines the steps involved in running and saving contract reports related to Active Contracts stored in MediTract.

1. Navigate to the Contract Management Database

a. 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

a. Insert your User Name and Password as shown below:



b. 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.

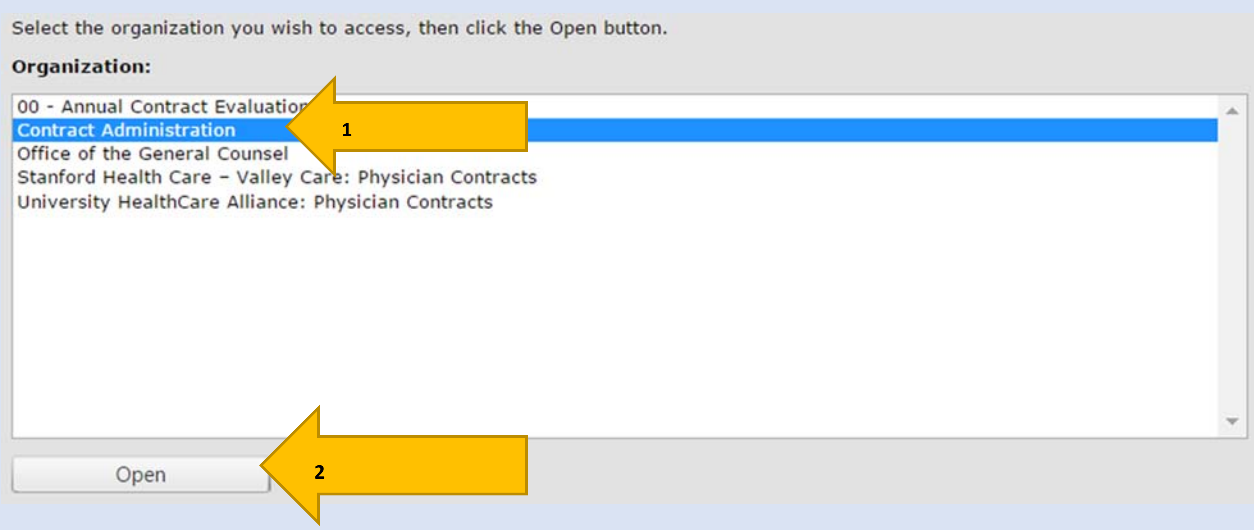
v. **TERMS**: this organization contains physician time records associated with physician administrative service contracts.

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:

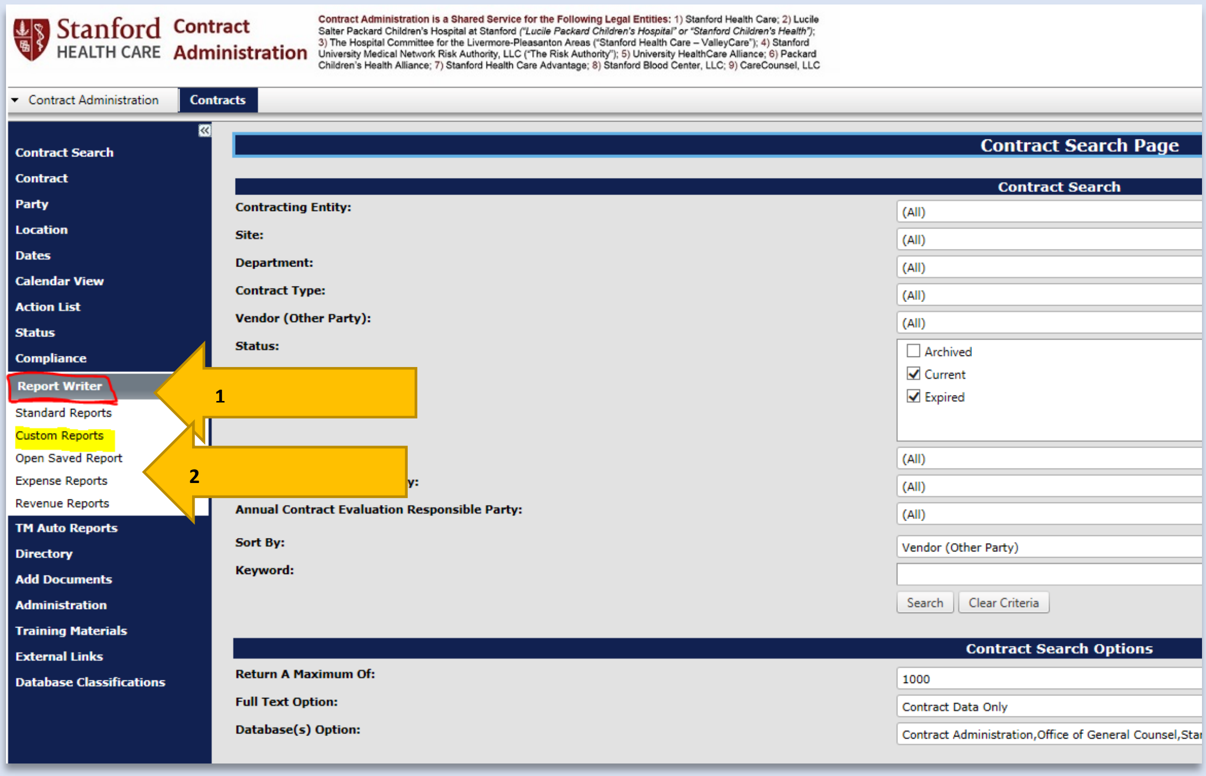
1. Contracts involving Real Estate
   I. For Stanford Health Care: Managed by Meredith Fondahl, Administrative Director of Real Estate, and not stored in MediTract.
2. Contracts involving Planning, Design & Construction of New Buildings
   I. For Stanford Health Care: Managed by Matt Pearson, Planning, Design & Construction, and not stored in MediTract.

b. Select the applicable organization from the “Organization” list options and then click “Open”:



4. Select “Report Writer”

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

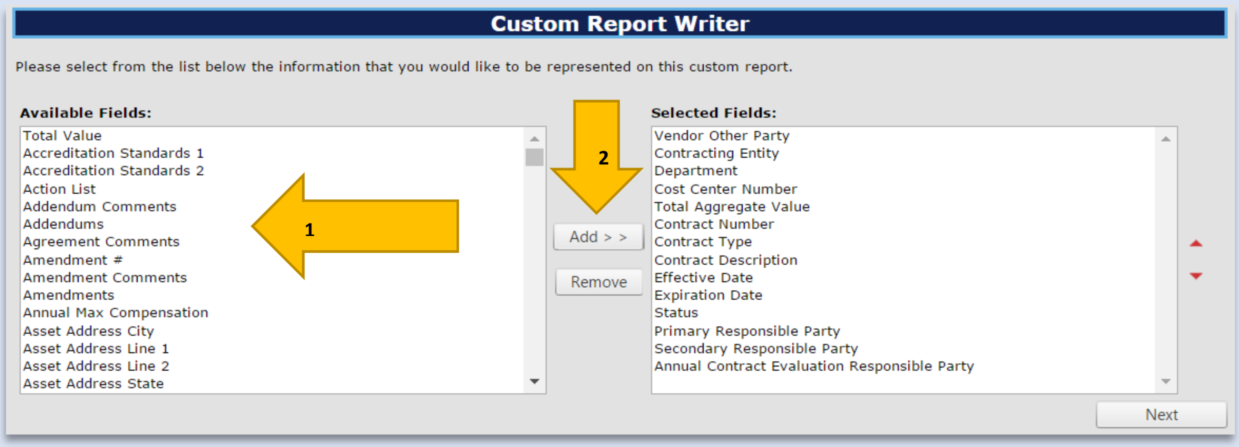


5. Choose the Criteria

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:

   i. Double click on the field; or

   ii. Select the field and then click the "Add" button.

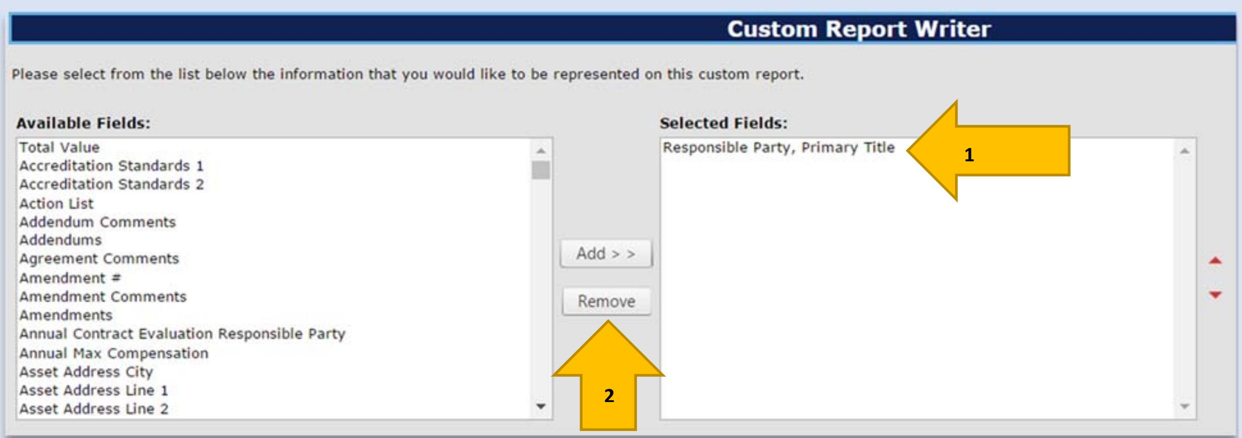


   iii. The field selected will appear in the "Selected Fields".

b. To remove fields from the "Selected Fields" list:

   i. Double-click the information line entered in the Selected Field; or

   ii. Select the information line entered and click the "Remove" button.

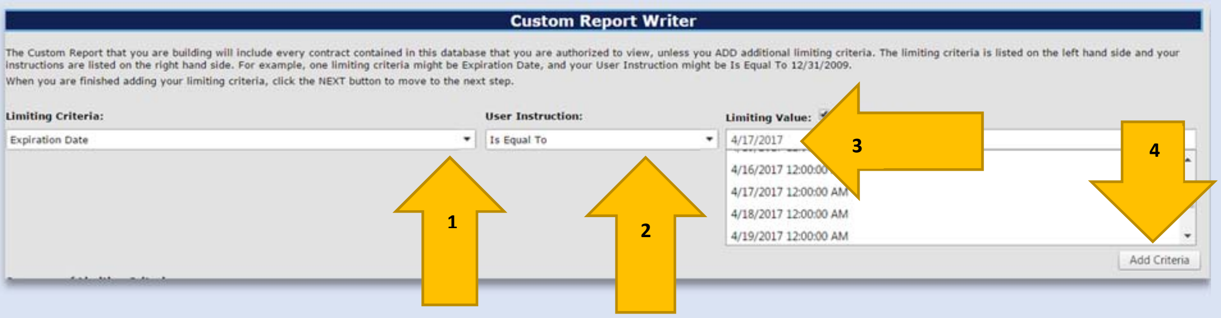


c. When done, click the "Next" button at the bottom displayed below:

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:

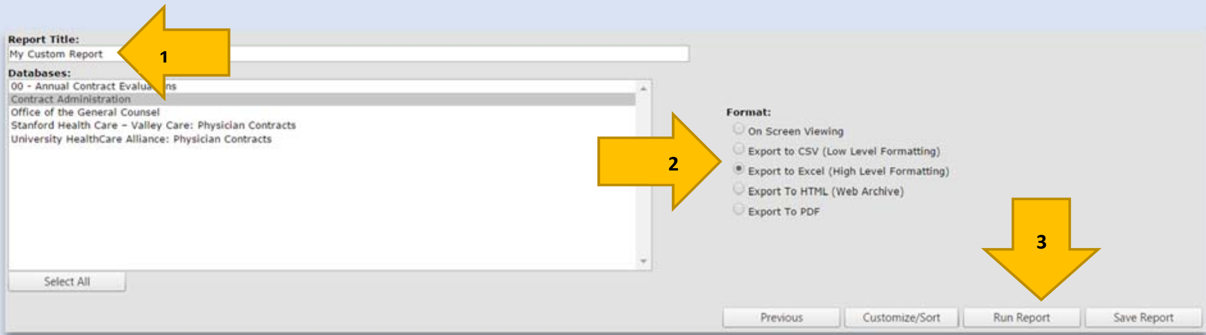
   i. select from the drop-down list the criteria to limit the list of results in the “Limiting Criteria” window, on the left side of the “Custom Report Writer” page;
   ii. select the instruction in the “User Instruction” box;
   iii. enter the applicable “Limiting Value” in the right side;
   iv. e.g., 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.



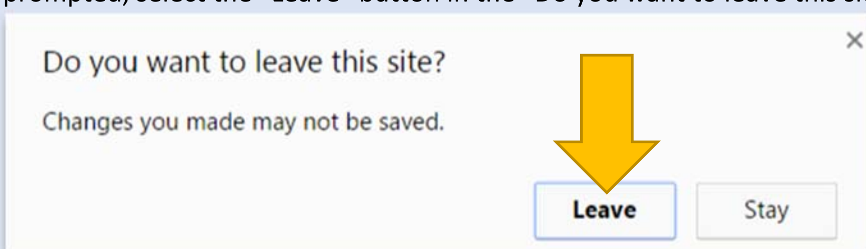
b. Click the “Next” button displayed below:

7. Prepare the Report

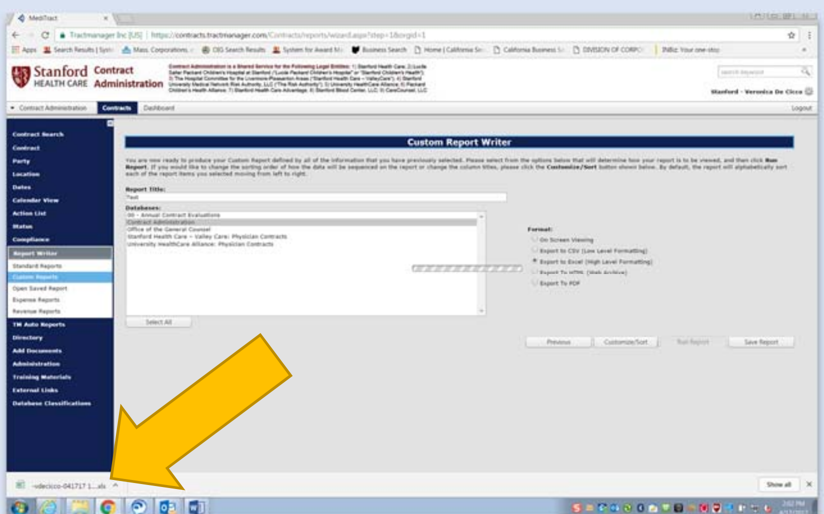
a. Edit the report title.
b. Select the report format: preferably select the "Export to Excel" option.
c. To run the report, click the Run Report button.



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



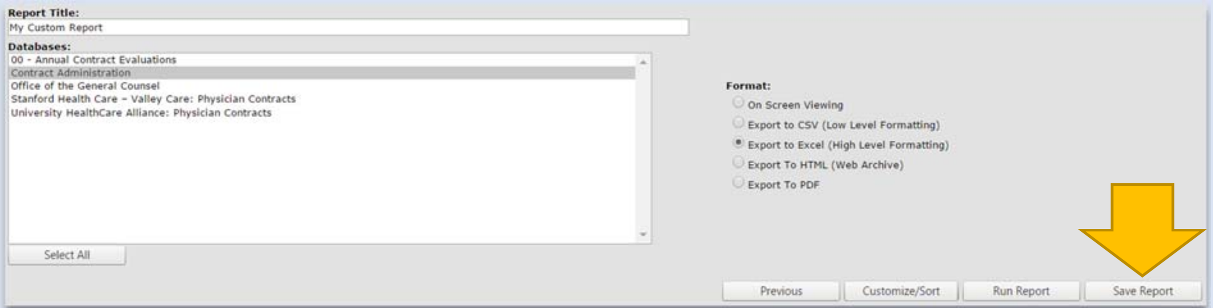
e. The Report has been generated with the criterion selected and an Excel file icon will appear at the bottom left side of the screen. Click on the Excel file icon to open the Contract Report.



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.



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

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