Stanford HEALTH CARE **Contract Administration**

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

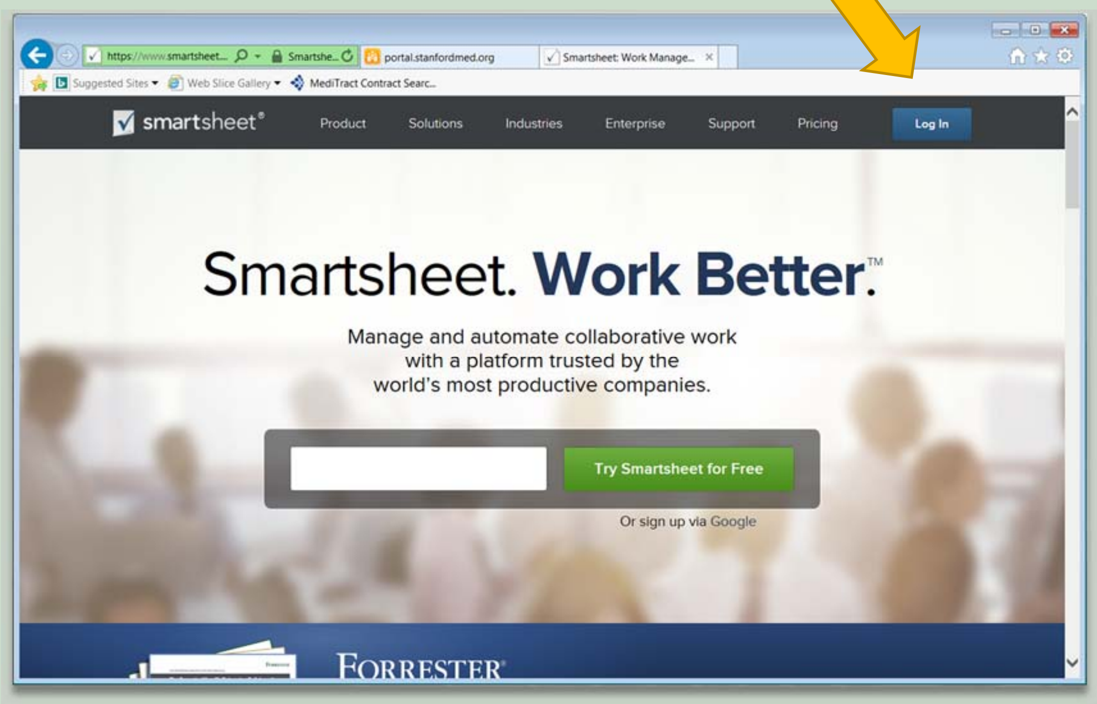
TRAINING GUIDE – Track a Requested Contract

Description: Contract Administration uses an online application called "Smartsheet" to log and track all contracts that are "work in progress." Contract Administration logs each contract request and updates the log after any activity is taken on a contract. Smartsheet requires a username and password, which can be obtained by contacting ContractAdministration@stanfordhealthcare.org. This training guide outlines the steps for tracking a requested contract in Smartsheet.

1. Navigate to Smartsheet

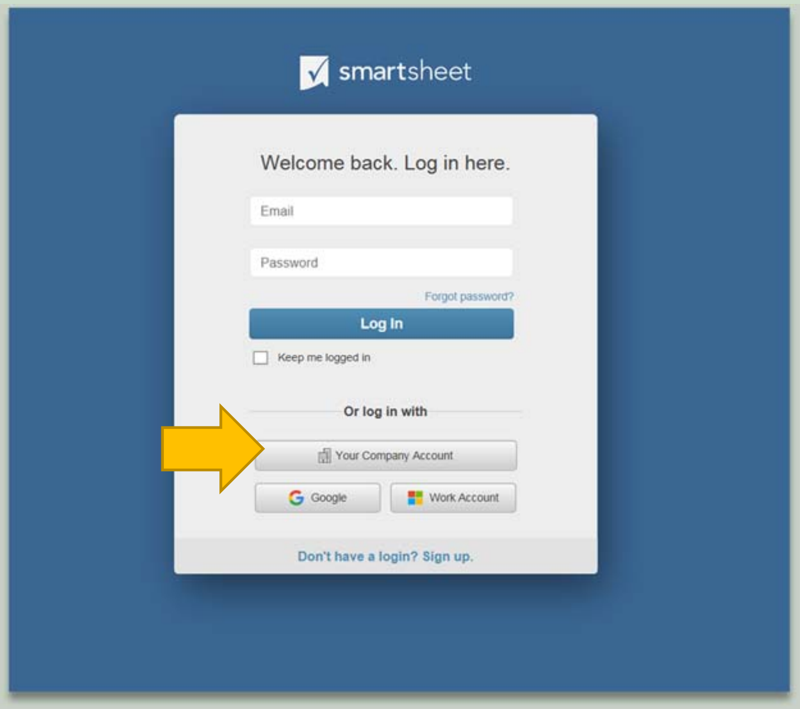
a. Navigate to https://app.Smartsheet.com/b/home.

b. Click the "Log In" button on the top right of the screen.

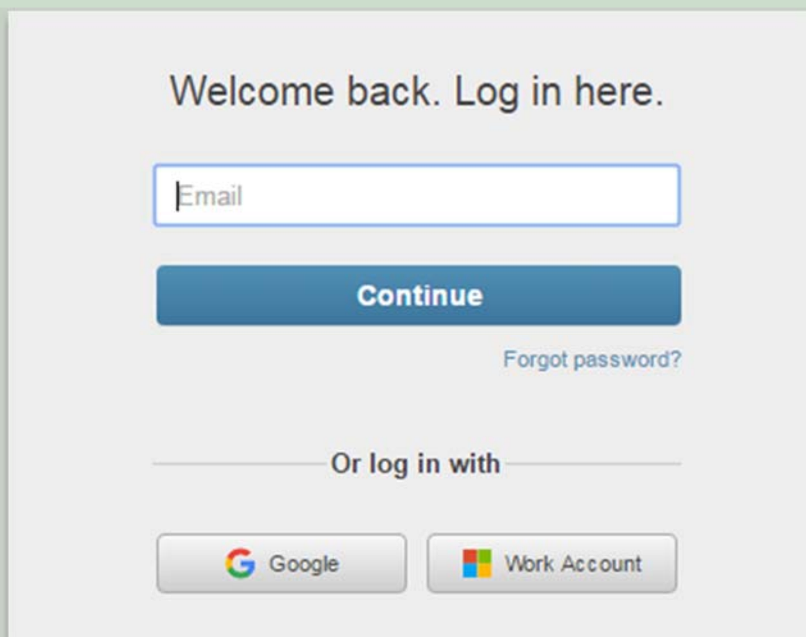


2. Log in to Smartsheet

a. Click on the “Your Company Account” button.



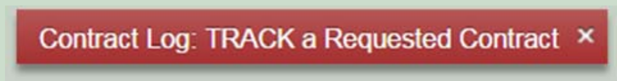
b. Or, in the Log in Page, enter your entity email in the dialogue box and then click “Continue”.



3. Open the Applicable Contract Log

a. Click on the "Home" button in the top left hand side of the screen.

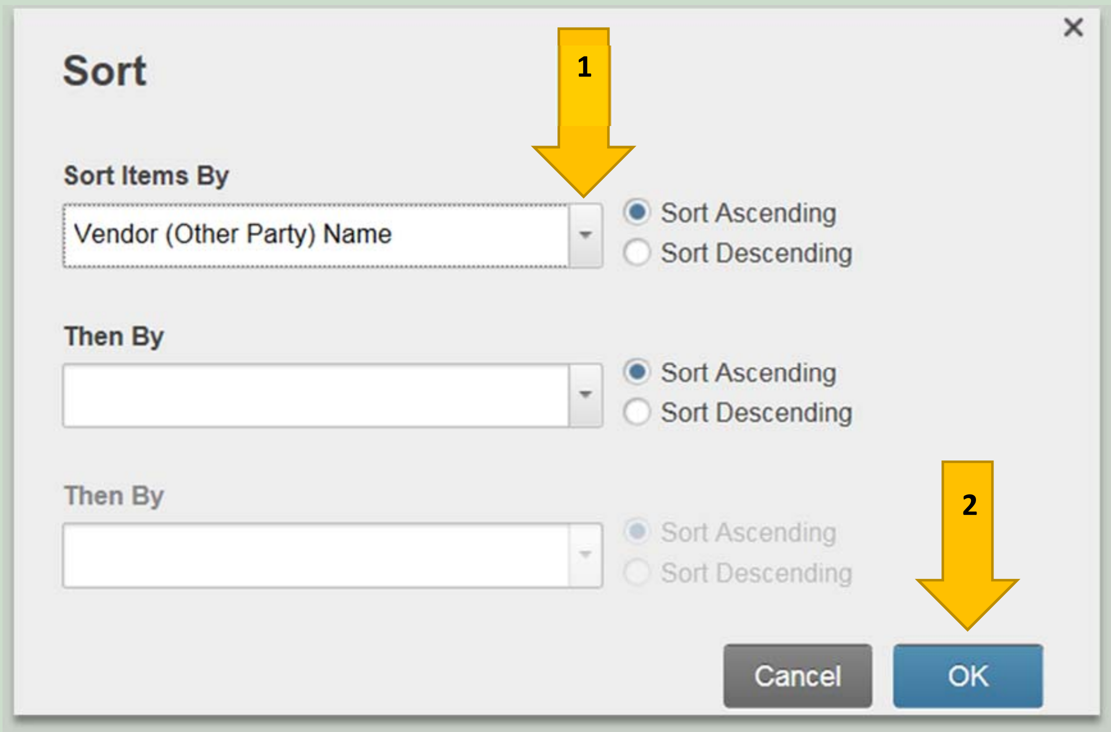
b. Select the "Contract Log: TRACK a Requested Contract" smartsheet or tab.



4. How to Sort by Vendor (Other Party) Name

a. Clicking the “Sort Rows…” option allows you to choose the sort criteria.

b. Select the “Vendor (Other Party) Name” option in the “Sort Items By” drop down list and choose “OK” to sort the contract log by “Vendor (Other Party) Name” in ascending order as depicted in the image below:

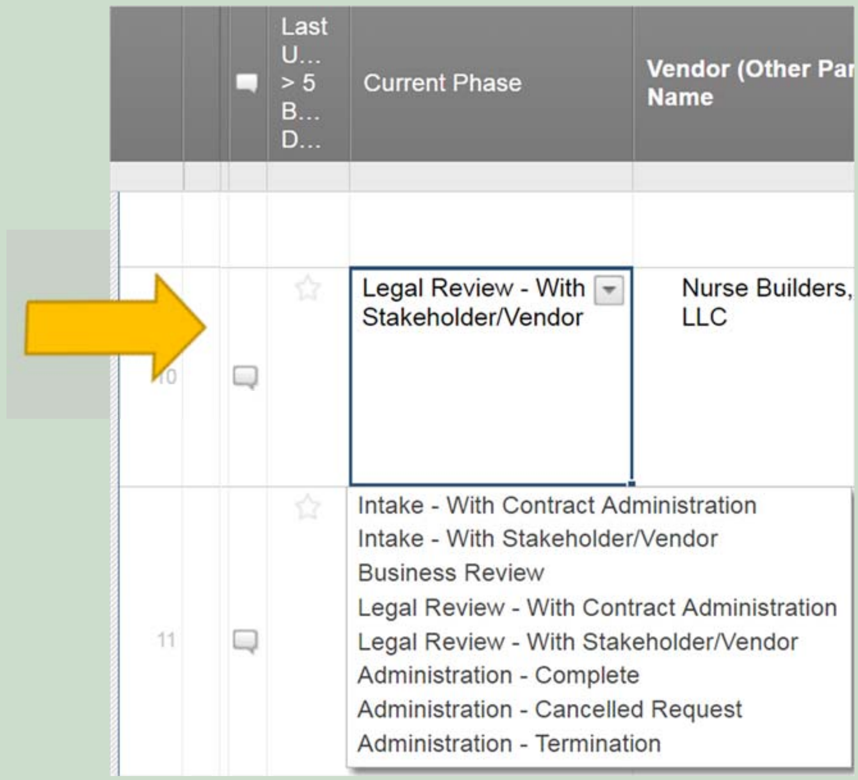


c. Note: you can choose a different “Sort Items By” options to sort by any field available.

5. Viewing Contract "Comments" that List the Last Action Taken and Next Steps on a Contract

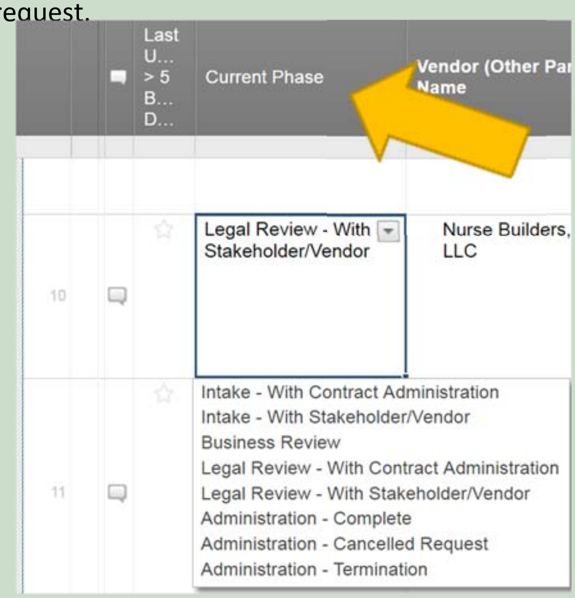
a. There is a comment bubble on each row that looks like this:

b. When you click on the comment, it will show you the history of the contract request, including who took what action, the date and time the action was taken, and the next steps for the contract:



6. Viewing Where the Contract is in the Contract Lifecycle

a. In the "Current Phase" cell you can see where the contract is in the Contract Lifecycle status update of the contract request.



b. The definitions of each phase of the contract lifecycle are listed below:

i. **Intake – With Contract Administration**: A Contract Administrator receives a request that still requires an action by a Contract Administrator before the contract moves to the next phase.

ii. **Intake – With Stakeholder/Vendor**: A Contract Administrator determines additional information or further confirmations are required by a Stakeholder/Vendor for the request to proceed to the next phase and the Contract Administrator sends an email requesting missing or additional information. During this phase, the Stakeholder/Vendor is responsible for providing the information or confirmations to keep the transaction progressing.

iii. **Business Review**: A Stakeholder must provide or obtain confirmations in compliance with policies and procedures relevant to the transaction to proceed to the next phase. For example, Stakeholder is required to obtain additional authorization and/or signatures from CFO, CEO, provide the Human Resources approved Independent Contractor Questionnaire, etc.

iv. **Legal Review – With Contract Administration**: A Contract Specialist has received a task that requires the Contract Specialist to provide a response for the Legal Review phase to continue. For example, Contract Specialist needs to review the request and provide feedback on next steps, draft a document, make or review redlines, etc.

v. **Legal Review – With Stakeholder/Vendor**: A Contract Specialist has completed a task that requires a response from a Stakeholder/Vendor in order for the Legal Review phase to continue. For example, a Contract Specialist requests additional information from a Stakeholder/Vendor, or provides information, performs Legal Review/redlines a contract and submits for Stakeholder/Vendor review.

vi. **Administration – Complete**: A Contract Specialist has received a signed contract from the Vendor (Other Party) and has signed a Contract Approval Form ("CAF").

vii. **Administration – Canceled Request**: A Stakeholder notifies Contract Administration that a contract that is "work in progress" is no longer needed and will not be signed; or a contract that is "work in progress" has been with a business owner for longer than 45 days without any communication from the business owner.

viii. **Administration – Termination**: A Stakeholder notifies Contract Administration that a fully signed contract is no longer needed and terminates it.

7. Color Coding Definitions

a. Any cell that is highlighted in yellow means Contract Administration is missing information about the contract request or information received about the request is unclear.

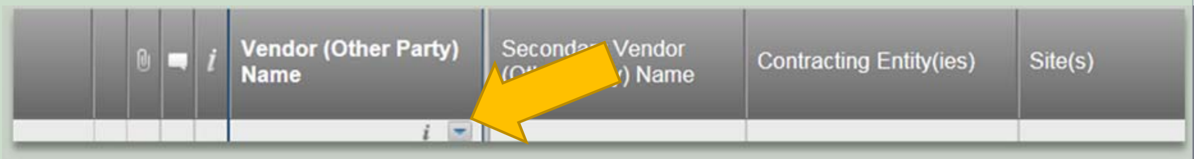
Stanford Health Care ("SHC")		**Environmental Health & Safety**

b. Any row highlighted in purple means the contract request is completed or canceled. Completed or canceled contract requests are archived at the end of each month.

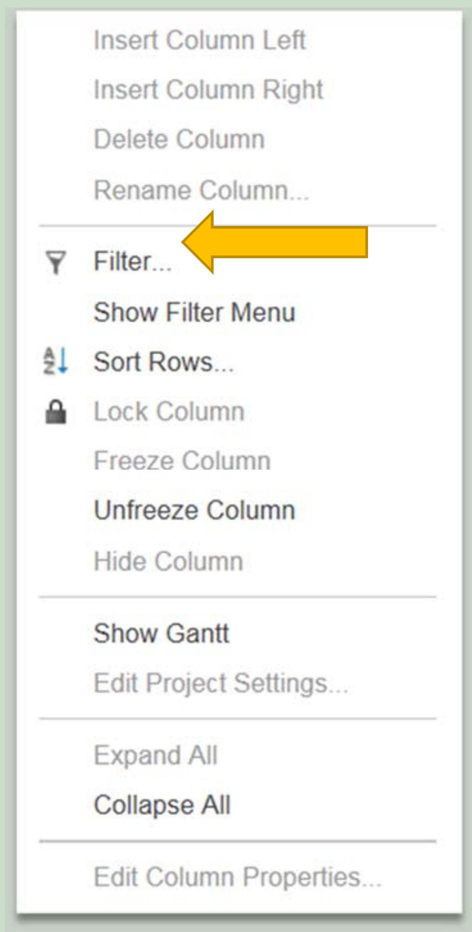
N/A	Stanford Blood Center, LLC ("SBC")		Stanford Blood Center

8. Filtering Data in Smartsheet

a. When you hover your mouse over any column name, you will see a small drop-down icon appear as depicted by the yellow arrow.

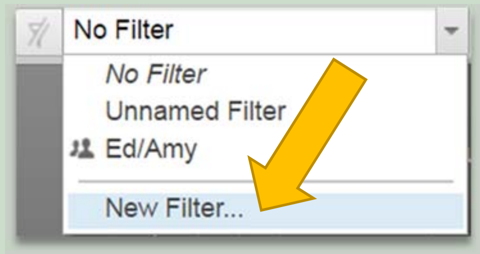


b. Clicking this drop-down icon will allow you to filter the contents of the Contract Log to make searching for requested contracts easier.

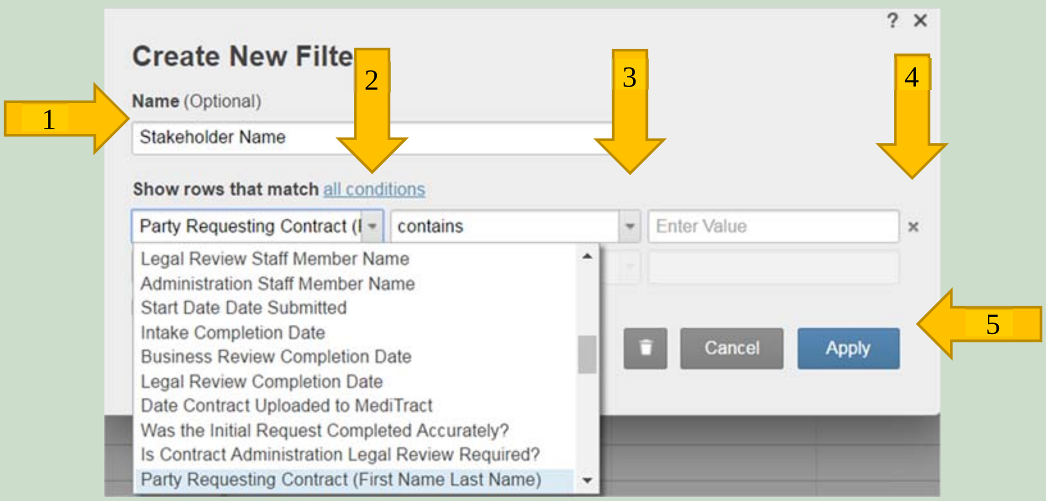


9. Saving Commonly Used Filters

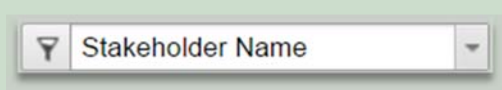
a. In the top left side of your screen, click the drop-down list next to the dialogue box “No Filter” and select “New Filter…”.



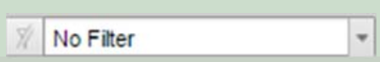
b. Clicking the “Filter…” option allows you to exclude certain results from your view. For example, selecting the applicable options from left to right, you can filter by “Party Requesting Contract (First Name Last Name)” to view only those contract requests submitted by and pertaining to the specific Party Requesting Contract in which you are interested (e.g., the contract requests you submitted). After all the selections are entered, click the “Apply” button. Note: if you want to sort and filter data on the contract log, you must first sort the data and then filter. You cannot sort data once a filter is being used.



c. Once you enter all the selections and click the “Apply” button, you will be able to see Your Filter saved under Your Name in the dialogue box at the top left side of the screen and you will be able to use it every time you want, by selecting it from the drop-down list.



d. To dismiss the filter and go back to showing all the data on the Contract Log, click the drop-down list and choose “No Filter”.



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