



Contract Management System



VENDOR REFERENCE MANUAL

USER INFORMATION

Name

ContrackHQ Username

ContrackHQ Password

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Monroe County Electronic Submission Notice

Vendor Master Record Form and Instructions

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Getting Started and Logging In

Using Firefox as Your Browser

It is recommended that you use the Mozilla Firefox browser when using the ContractHQ Contract Management System. You can use Internet Explorer, but Firefox is recommended because it is a more secure browser and there are some visual/ functional differences that will provide a more efficient user experience.



The free Firefox browser can be downloaded at <http://www.mozilla.com>

Launching the Application

You can access ContractHQ (the Monroe County Contract Management System) at <http://www.contracthq.com>

Initial Login Screen

When you first log into ContractHQ, you will be presented with a disclaimer you are agreeing to. It is worded as follows:

Monroe County has recently implemented changes to the Contract Management procedure to further streamline and enhance the efficiency of the process.

You are attempting to gain access to a secure system and are required to read and acknowledge the Electronic Submission Notice.

By entering your username and password, you are acknowledging that you have read and understand the Electronic Submission Notice when you click the "I Accept" button.

Click on [Electronic Submission Notice](#) to view the notice. A hard copy of the notice is included in the appendix of this manual.

A screenshot of the ContractHQ login interface. At the top, it says "ContractHQ™ The Simple Way to Track Contracts" with a logo and a seal. Below that is a green box with "Please log in". The main text reads: "Monroe County has recently implemented changes to the Contract Management procedure to further streamline and enhance the efficiency of the process." followed by "You are attempting to gain access to a secure system and are required to read and acknowledge the Electronic Submission Notice." and "By entering your username and password, you are acknowledging that you have read and understand the Electronic Submission Notice when you click the 'I Accept' button." There are input fields for "Username:" and "Password:". Below them is a button labeled "I Accept". At the bottom, it says "Forgot your username or password? Enter either your email address or your username below to have your login details emailed to you." with an input field and a "Send info" button.

Logging In

Enter your username and password in order to access the application. Your privileges and what you see are determined by your login.

When you click the “I Accept” button, you will be entering the system and landing at your “Dashboard.”

Forgot Username or Password?

You can recover your username or password by entering either your email or username in the box below the “I Accept” button. Send the information and your username and password will be emailed to the email address on file.

If you do not have a login and would like to request access to the application, please click on "email help" at the bottom of the login page.

Vendor Manual

Click on “vendor manual” at the bottom of the login screen to download the ContrackHQ Vendor Manual.

Vendor Request Forms

Click on “vendor request forms” to download the vendor master request form and the vendor contract access form, together with instructions. Copies of both forms and instructions are also found in the appendix of this manual.

Email Help

Click on “email help” for assistance with ContrackHQ.

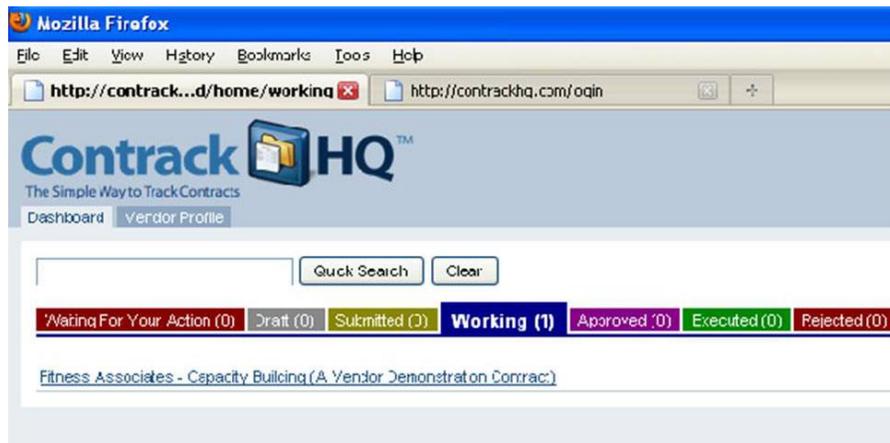
The ContrackHQ Dashboard

Viewing Your Accessible Contracts

You will land on the ContrackHQ dashboard page upon signing in to the system. This page will allow you to view all contracts to which you have access.

Status Tabs:

All contracts to which you have access may be found listed under their respective status tab. The number appearing on the tab in parentheses next to the status name refers to the number of contracts you have access to within each status. Click the status tab to bring the name of the contract(s) within that status to your dashboard.



Note that the message “You have no contracts under this status tab” means you do not have access to any contracts under the current open status tab. The open status tab is easily identified as being the largest of the visible status tabs. You may have access to contracts under a different status, as indicated by a number in parenthesis other than (0).

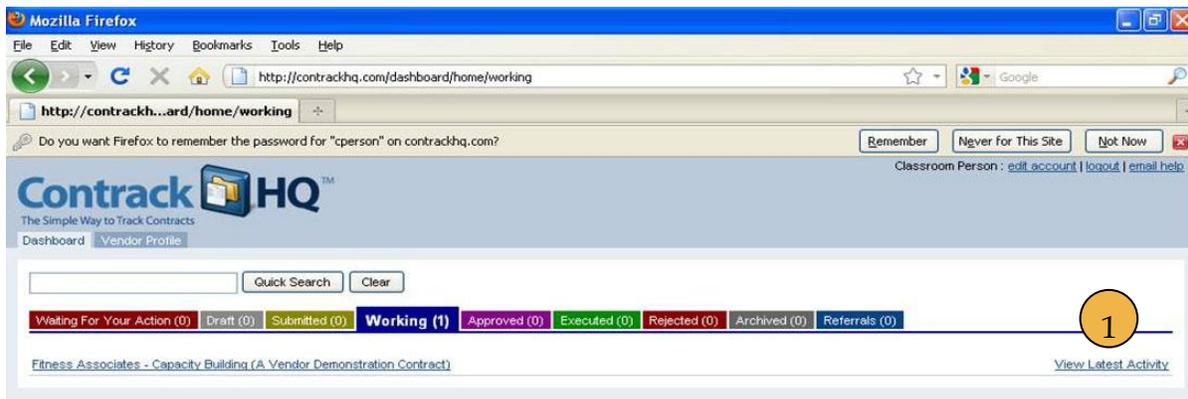
Quick Search button

Your specific contracts may be accessed by placing the name of either the vendor or the contract itself in the blank box, and then hitting the “Quick Search” button. Only those contracts matching your specific request are then found within the status tabs.

Accessing Individual Contract Information

You may access individual contracts by clicking on the name of that contract after it appears on your dashboard. Upon entering the contract, you will arrive at the contract overview page for that respective contract.

You may view the five most recent activities on a contract by clicking 'View Latest Activity' (1). Clicking again will eliminate the activities from the current view.



Edit User Account

You can edit your ContrackHQ personal user account information by clicking on 'Edit Account' in the upper right corner of the page, next to your name. Once you arrive at this screen, you may change your password, or update your contact information.

Logout

When you wish to logout of ContrackHQ, click on 'Logout'

Email Help

Click on 'Email Help' for ContrackHQ assistance. You will receive a reply either through email or by telephone.

Contract Status

Draft - The Contract request is currently being completed by the Monroe County Department of Human Services

Submitted - The contract is currently in development in Purchasing.

Working - The contract is in the approval routing process.

Approved - All required contract approvals have been secured.

Executed - The contract has been fully executed and entered into the Monroe County Financial System.

Rejected - A user in the approval routing has rejected the contract, and it has been returned to Purchasing.

Archived - The contract end date is more than one year (365 days) old.

NOTE:

A Contract Access and Routing Request form must be submitted by the vendor to Monroe County Purchasing for each individual contract. The purpose of this form is to grant individual users access to contracts, and to determine the order of contract approval, ending with the signatory.

A copy of the Contract Access and Routing Request form together with instructions can be found in the Appendix of this manual. The form can also be accessed via the bottom of the ContrackHQ log in page.

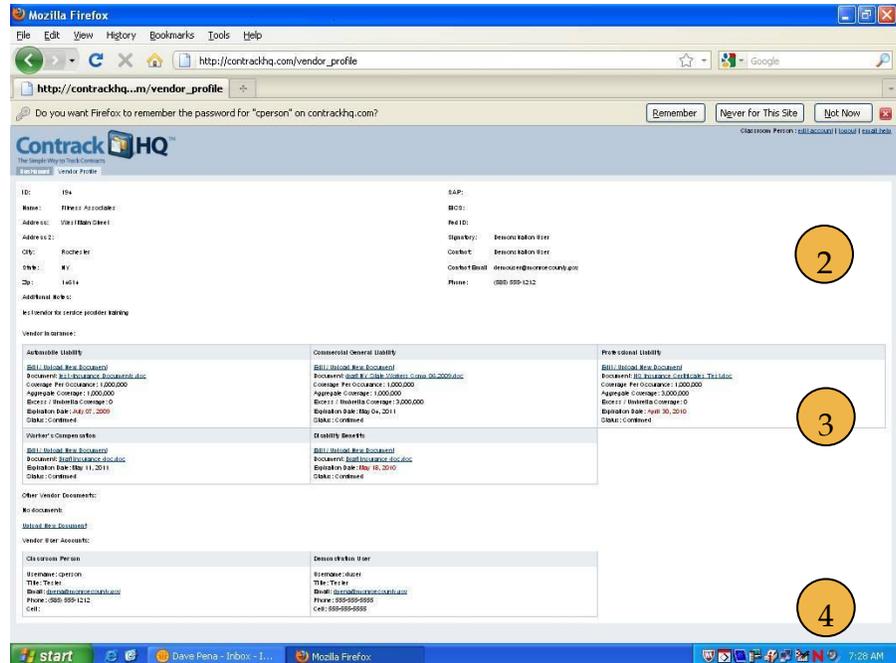
Vendor Profile

Vendor Profile

When you click the “Vendor Profile” tab on the dashboard, you will be taken to a page listing all of the contact information (2) for the municipality or agency, the current insurance information on file (3), and all of the users (4) associated with this account within the system.

Some of the information you will see includes:

- System ID
- Name
- Address
- Contact
- BICS Number
- Phone
- Signatory
- Contact Email
- Insurance Information
- Vendor User Accounts
- SAP Number
- Federal ID



Updating Your Vendor Profile

Complete an updated Vendor Master Request form to:

- Change vendor record information
- Add or delete users (note that the user listed as the program contact name will be sent email notifications when insurance coverage needs to be updates, or when performance measure reporting is due).
- A copy of the vendor master request form, together with instructions, can be found in the appendix of this manual. The form can also be accessed via the bottom of the ContrackHQ login page.

Forward the completed vendor master request to Monroe County Purchasing, per instructions on the top of the form.

Submitting Insurance Documents

You may submit insurance documents for any of the following categories: **Automobile Liability, Commercial General Liability, Professional Liability, Workers' Compensation and Disability Benefits.**



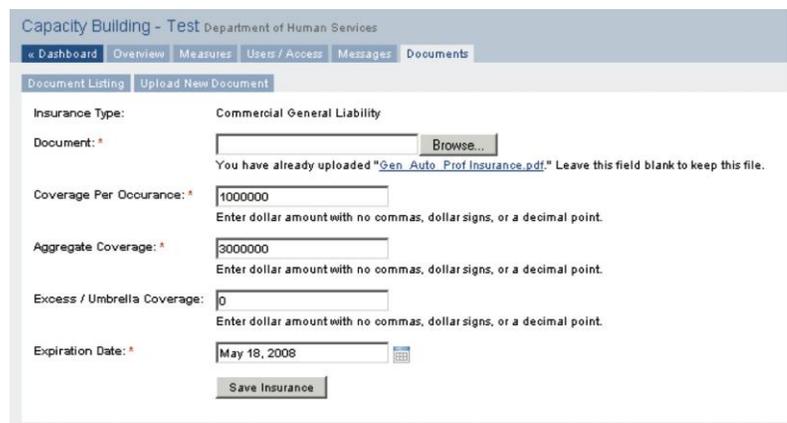
Additional Notes:	
Automobile Liability	Commercial General Liability
No insurance document has been uploaded yet. Click here to upload.	No insurance document has been uploaded yet. Click here to upload.
Worker's Compensation	Disability Benefits
No insurance document has been uploaded yet. Click here to upload.	No insurance document has been uploaded yet. Click here to upload.

This is done by clicking on the “No insurance document has been uploaded yet. Click here to upload.” link.

Entering or Updating Insurance Information

After clicking the link, you will be sent to an upload page. On this page you must upload the required document by clicking on the “Browse” button. Once you have added the appropriate document, you need to enter the remaining required information including:

- Coverage Per Occurrence
- Aggregate Coverage
- Expiration Date



Capacity Building - Test Department of Human Services

Dashboard Overview Measures Users / Access Messages Documents

Document Listing Upload New Document

Insurance Type: Commercial General Liability

Document: * Browse...
You have already uploaded "Gen_Auto_Prof_Insurance.pdf." Leave this field blank to keep this file.

Coverage Per Occurrence: *
Enter dollar amount with no commas, dollar signs, or a decimal point.

Aggregate Coverage: *
Enter dollar amount with no commas, dollar signs, or a decimal point.

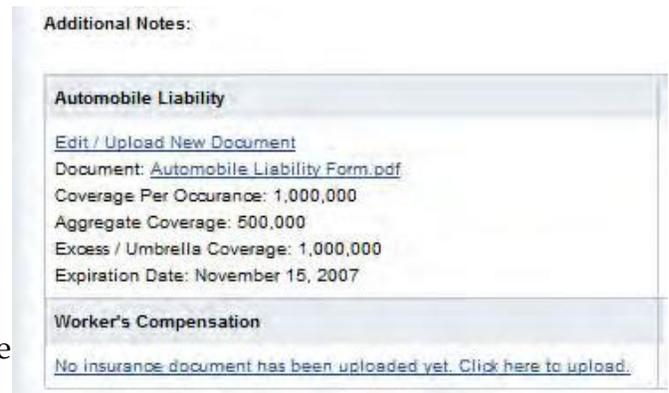
Excess / Umbrella Coverage:
Enter dollar amount with no commas, dollar signs, or a decimal point.

Expiration Date: *

Save Insurance

An optional Excess/Umbrella Coverage can also be entered.

Click “Save Insurance” to submit the insurance document and add the information to the vendor record.



Additional Notes:	
Automobile Liability	Commercial General Liability
Edit / Upload New Document	Edit / Upload New Document
Document: Automobile Liability Form.pdf	Document: Automobile Liability Form.pdf
Coverage Per Occurance: 1,000,000	Coverage Per Occurance: 1,000,000
Aggregate Coverage: 500,000	Aggregate Coverage: 500,000
Excess / Umbrella Coverage: 1,000,000	Excess / Umbrella Coverage: 1,000,000
Expiration Date: November 15, 2007	Expiration Date: November 15, 2007
Worker's Compensation	Disability Benefits
No insurance document has been uploaded yet. Click here to upload.	No insurance document has been uploaded yet. Click here to upload.

You can view the document, edit the insurance information or upload a new document at any time.

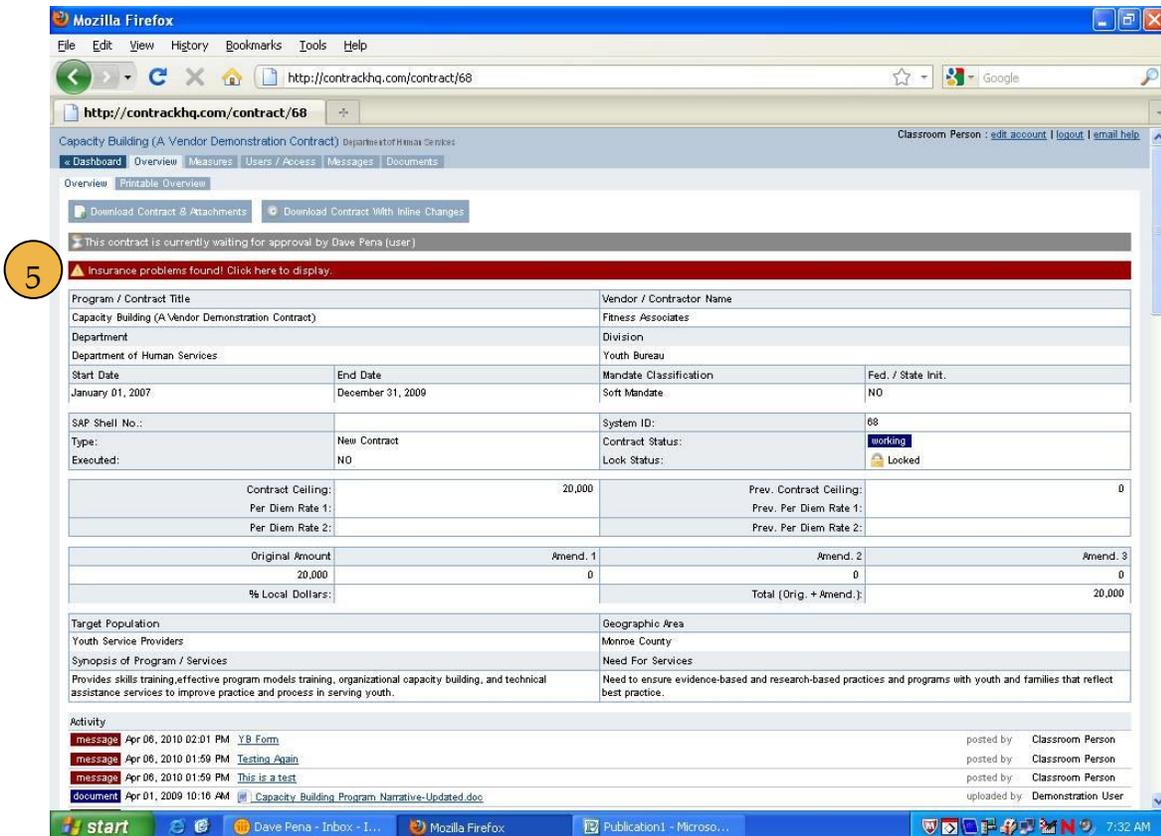
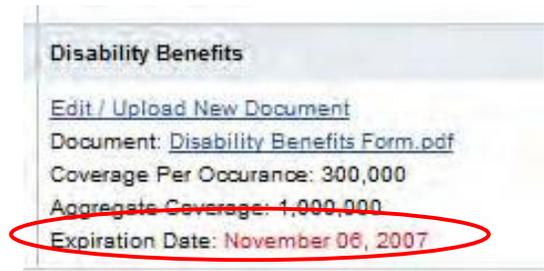
Confirmed versus Unconfirmed Insurance

Whenever a new or revised insurance certificate is uploaded by a vendor the status is automatically changed to unconfirmed. This means that the County must go into the system and verify that all the information on the certificate is correct. Once they verify the information they will change the status to confirmed. The insurance certificate will not be considered valid until the information is confirmed.

Expired Insurance

If the insurance is expired or the coverage is inadequate, you will be notified by red text (5) on the contract over- view page.

An email notice will be sent out alerting you that your insurance expiration date is approaching 60-days, 30-days, and 0-days prior to the expiration.



Note that contract approval by Monroe County is contingent upon the confirmation of all required insurance coverages.

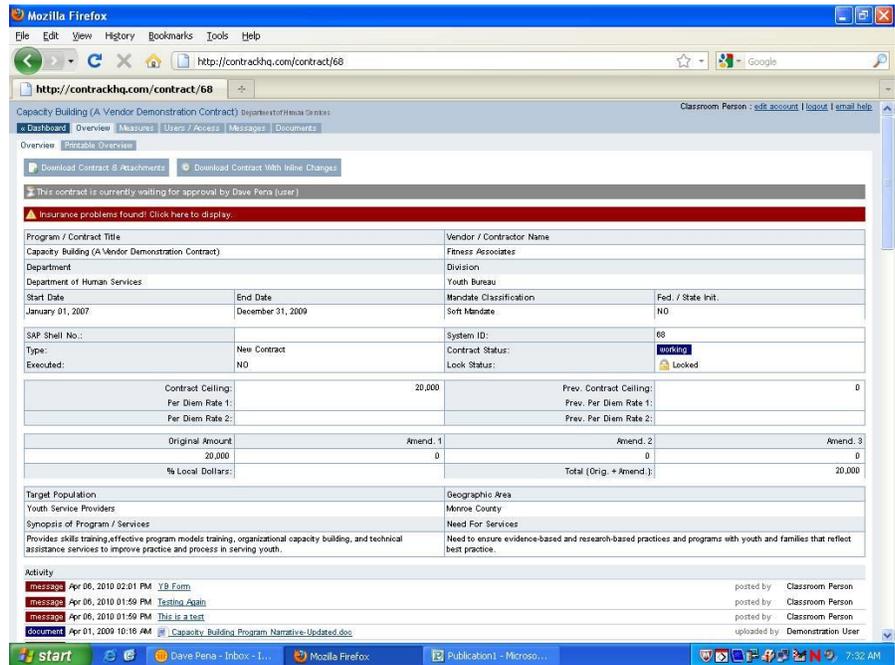
Contract Overview Page

Contract Overview

The overview page provides the primary contract details in an easy-to-read one-screen format.

The details include the following:

- Program/Contract Title
- Vendor/Contractor Name
- Department
- Division
- Start Date
- End Date
- Mandate Classification
- Federal/State Init.
- System ID
- Contract Status
- Contract Ceiling
- Previous Contract Ceiling
- Per Diem Rate 1
- Previous Per Diem Rate 1
- Per Diem Rate 2
- Previous Per Diem Rate 2
- Original Amount
- Amended Amount 2
- Percentage of Local Dollars
- Target Population
- Synopsis of Program/Services
- Activity
- Amended Amount 1
- Amended Amount 3
- Total Amount
- Geographic Area
- Need for Services



Activity

The following are categories of activities that may appear in the activity listing: approval, comment, contract, document, measures, message, notice, request, status

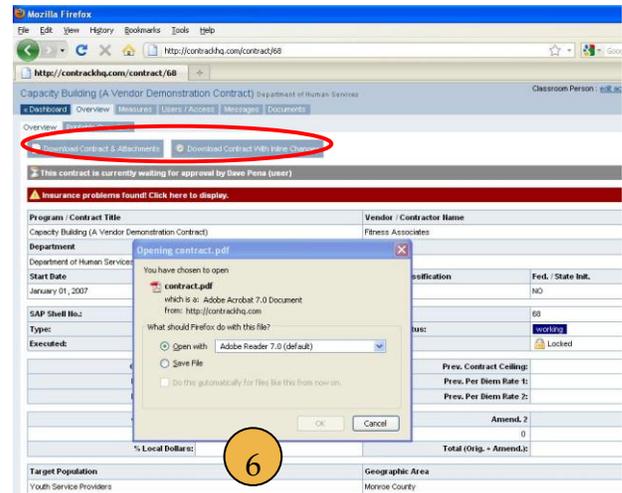
Printable Overview

click on the “Printable Overview” tab should you need a hard copy of the contract overview page. The approval sequence and status will be displayed at the bottom of the page, rather than the activity listing.

Downloading the Contract Document

You can download and view the contract document in two ways:

1. Download the most recent version of the contract
2. Download the contract with inline changes (this will allow you to see what edits have been made during the contract building process).



Once you click the link to download the contract, it will prompt you (6) to open it with a specific program or save it to your desktop as a PDF. You will need the free Adobe Reader (or an equivalent program) to view the document.



You can download this free program from Adobe at <http://www.adobe.com>

All documents associated with the contract may be accessed by clicking the documents tab.

Contract Alerts

A contract alert bar may sometimes appear on the contract overview page directly beneath the download tabs. The alerts will be found when insurance documents are needed (see sample screenshot), or when contract approvals are needed. Click the alert bar if prompted to do so.



Reporting Contract Measurements

Contract Measurements

This is where you will report your performance actuals (quarterly or monthly depending on your contract).

Entering Performance Actuals

Fill in the performance actuals (7) for the month or quarter and enter any additional reporting information (8) if necessary. Note that the performance actuals are to be reported in the white boxes.

The screenshot shows a web browser window with the URL <http://contracthq.com/contract/66/measures>. The page title is "Capacity Building (Construction Contract) Department of Human Services". The browser's address bar shows the URL. The page content includes a navigation menu with "Home", "Measures", and "Reports" buttons. Below the navigation menu, there is a section for "Performance Measure #1" and "Performance Measure #2". Each section has a table for reporting actuals by quarter and YTD. The "Save Values - Submit Later" button is circled in red, and the "Submit Report" button is circled in yellow. The form also includes a section for "Additional reporting information" and a "Comments" section.

Saving Performance Measures

Should you wish to enter, yet not submit performance actuals, click the “Save Values – Submit Later” button.

Submitting Performance Actuals

Once you have filled in the required performance actuals, click on the “Submit Report” button (9) to alert Monroe County that this task has been completed. It will also show up on the Dashboard as recent activity.

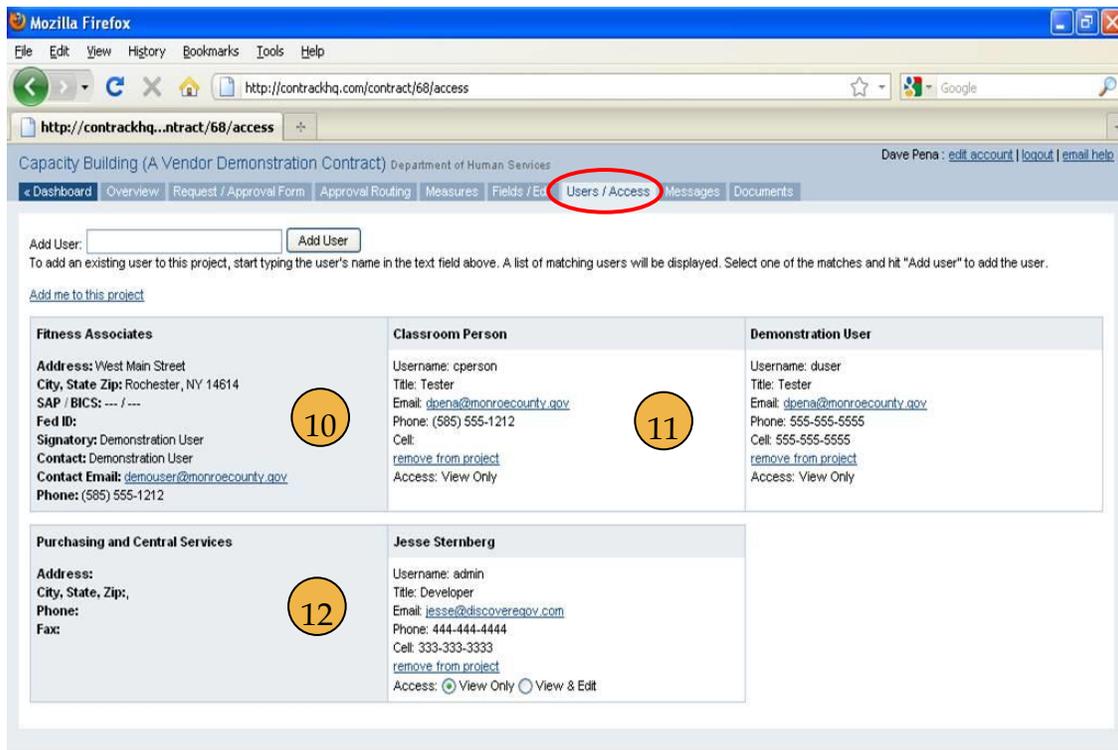
Performance Measure Notifications

An email from “monroecounty@contracthq.com” will be sent to your ContractHQ contact as a reminder when performance measures are due.

Users and Access

Users and Access Information

This is where you can view your current vendor information (10), see users who have access to this contract (11), and see what Monroe County Departments or Agencies/Employees are also associated with the contract (12).



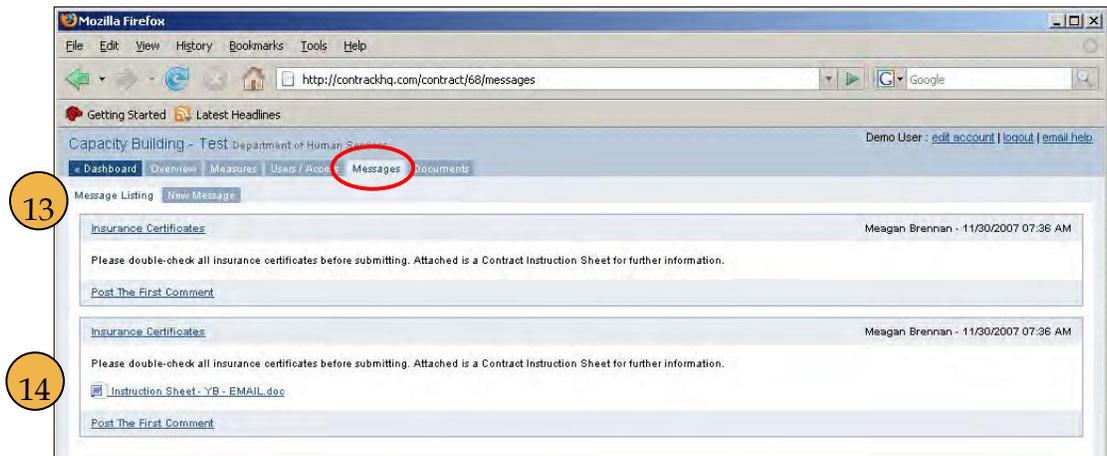
Associated Users

If someone is associated with a contract within the system, they will then have access to that contract on their Dashboard upon login.

Communicating through Messages

Contract Messages

When you click the “Messages” tab, you will be taken to a page listing all of the messages related to the contract (13). This is the best way to communicate with all users associated with the contract. Each time you submit a message it is added to the contract's activity listing (15). You can also choose to have an email notification sent to selected users as soon as the message is posted.



Attachments

Another benefit to using the Messages section of ContractHQ is the ability to attach documents (14) to your messages. A direct link to the document may be found in the activity listing (15) as soon as the document is uploaded. It also helps keep everything in one place. There will be a dated record of the communication that can be followed and chronicled for future reference.

Posting a New Message

When you click the “New Messages” tab, you will be taken to a screen that will allow you to add your message to the system (similar to creating an email).

You will need to:

- add a subject (16)
- add message content (17)
- attach a document (18) (optional)
- choose who, if anyone, you want an email notification sent to as soon as the message is posted (19)
- click the “Post Message” button (20)

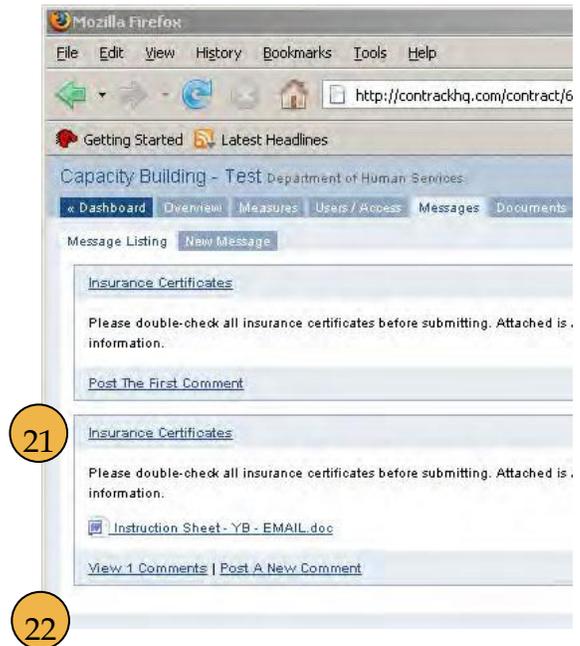
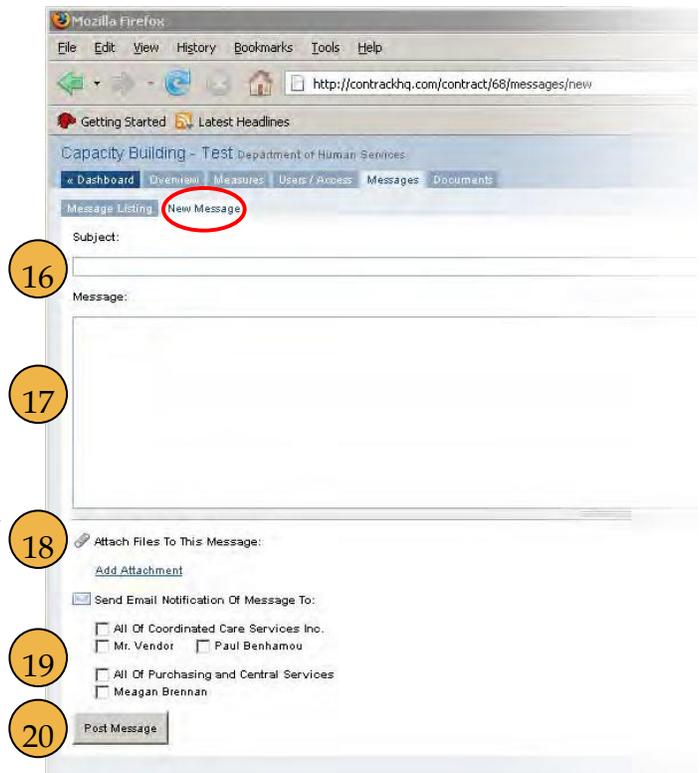
As soon as the message is posted, the document(s) will be available in the “Documents” tab, the message will show up in the Messages listing, and an activity will be added to the contract overview with a direct link to the message.

Adding the First Comment to a Message

If you want to add a comment to a message that has been posted, simply click the “Post the First Comment” link (21).

Viewing Comments or Adding Additional Comments to a Message

If comments have already been added to a message, you can click the “View” link to read the comments or “Post a New Comment” link to add another comment to the message (22).



Contract Documents

Contract Documents

When you click the “Documents” tab, you will be taken to a page listing all of the documents related to the contract within the system.

Uploaded Documents

The links to these documents provide access to all documents that are included with the contract. Simply click the name of the document (23) and you can download it for viewing in its native format (PDF, Word, Excel, etc.).

The screenshot shows a web browser window with the URL <http://contracthq.com/contract/68/documents>. The page title is "Capacity Building - Test Department of Human Services". The navigation menu includes "Dashboard", "Overview", "Measures", "Usage / Access", "Messages", and "Documents" (highlighted with a red circle). Below the navigation, there are buttons for "Download Contract & Attachments" and "Download Contract With all its Changes". A table lists documents with columns for "Documents & Revisions (click name to download, to re-upload)", "Description", "Uploaded By", and "Uploaded At". The first document is "contract.pdf" (Main Contract) uploaded by Meagan Brennan on 11/30/2007 07:38 AM. A yellow circle with the number "23" is placed over the document name. Below the table, there are sections for "Vendor Insurance Documents" including "Automobile Liability", "Commercial General Liability", "Professional Liability", "Worker's Compensation", and "Disability Benefits". Each section provides details like coverage per occurrence, aggregate coverage, expiration date, and status.

New Document Versions

Whenever you upload a document it is stored under the “Documents” tab. If the document is uploaded as a newer version, all older versions will be linked to it and displayed in a hierarchal manner showing the most recent version at the top and older versions below.

Uploading a New Document

Click ‘Upload New Document’ to upload a document into the contract. Browse the documents available to you in your system, and double click the desired document. A description of the document may be added if desired. Clicking ‘Save Document’ will add the document to the listing of available documents in the contract.

Insurance Documents

See page 10.

Approving and Rejecting a Contract

Waiting for Approval

If a contract is waiting for an approval you will be notified when you are on the contract's overview page. You will see either a gray box (24) indicating someone other than you needs to approve the contract or a green box (25) indicating you need to approve the contract. Click on the box and it will take you directly to the approval page. A reminder email from "monroecounty@contracthq.com" will also be sent when you need to approve the contract.

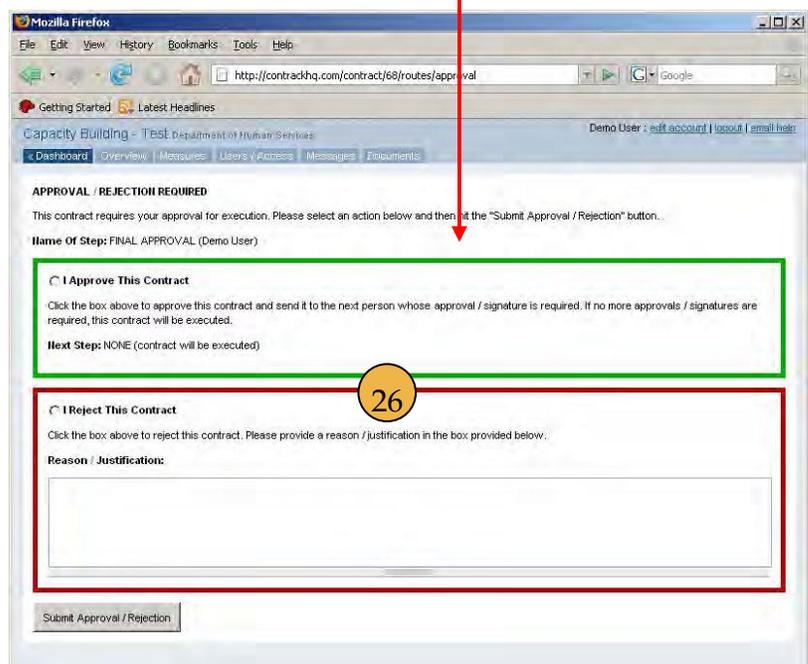


Approval Page

When you arrive at the approval page, you will need to approve or reject the final contract (26).

"I Approve"

Click the radio button next to "I Approve This Contract" to approve it and send it to the next person whose approval/signature is required. If no other signatures are needed, the contract will then be executed.

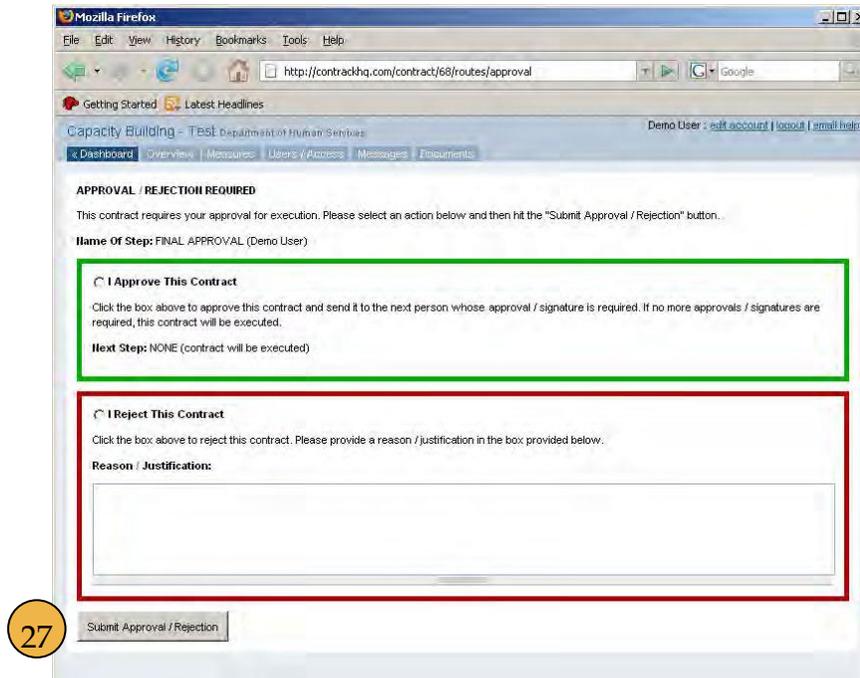


"I Reject"

Click the radio button next to "I Reject This Contract" to reject the contract. In addition, you will need to provide a reason or justification. This will send it back to Purchasing to begin the approval process again. An email notification will be sent to all users who have approved the contract up until the point of rejection.

Submit

Click the “Submit Approval/Rejection” button (27) to commit your selection.



Approval Status

The approval sequence and status may be viewed by accessing the printable version of the contract overview page. The approval information will appear at the bottom of the overview.

Applying the Digital Signature

The Signatories

The signatory is the designated officer from the vendor or the county having the authority to execute contracts. Once a contract has reached a specified signatory in the approval process (for the vendor or Monroe County), the signatory will be prompted to “Digitally Sign the Contract” (28) or “Reject the Contract.”

DIGITAL SIGNATURE / REJECTION REQUIRED
This contract requires your approval for execution. Please select an action below and then hit the "Submit Approval / Rejection" button.
Name Of Step: _____
 Digitally Sign This Contract **28**
Click the box above to approve this contract and proceed to the next person whose approval / signature is required. If no more approvals / signatures are required, this contract will be executed.
I agree that I have read and understand the Monroe County [Electronic Submission Notice](#). By applying my electronic signature to this document, I am acknowledging that I accept the terms and conditions set forth in this contract with Monroe County as binding and official.
Next Step: _____
 Reject This Contract
Click the box above to reject this contract. Please provide a reason / justification in the box provided below.
Reason / Justification:

Submit Approval / Rejection

If they choose to apply their digital signature to the contract, they are accepting the terms and conditions set forth in the contract with Monroe County as binding and official. If they choose to reject the contract and provide a justification for the rejection, the contract will go back to the beginning of the approval process.

The Digital Signatures

Once the digital signatures of the signatories have been applied to the contract they will show up on the last page of the PDF contract document. (29). The signature is a guarantee that the document has not been edited since the digital signature was applied. To learn more about the digital signature process and security it adds to a PDF, please visit the Adobe website (<http://www.adobe.com/security/digsig.html>).

DIGITAL SIGNATURES



An email from “monroecounty@contracthq.com” will be sent as notification to users when the contract has been executed.

Appendix Contents

Monroe County Electronic Submission Notice

When clicking the “I Accept” button when logging in, you are acknowledging that you have read, understand, and agree to the Monroe County Electronic Submission Notice.

Vendor Master Request Form

The primary purpose of the Vendor Master Request Form is to register vendors and their authorized users into the ContrackHQ system. The following should be noted regarding the Vendor Master Request Form:

- The Vendor Master Request form may be returned via email or by fax, as indicated on the form.
- Please print legibly when returning via fax.
- The form is also used to change vendor address information, and to add/delete users for vendors currently in the ContrackHQ system.

Step by step instructions for the Form are also included.

Vendor Contract Access and Routing Request Form

The primary purpose of the Vendor Contract Access and Routing Request Form is to set up the specific approval routing for each contract. Therefore, a separate form is required for each contract. The following should be noted regarding the Vendor Contract Access and Routing Request Form:

- The Vendor Contract Access and Routing Request form may be returned via email or by fax, as indicated on the form.
- Please print legibly when returning via fax.
- The form is also used to designate users not in the approval process to have access to the contract. An example might be a staff member needing to enter performance measurement data.

Individual users listed on the Vendor Contract Access and Routing Request Form will gain access to the specified contract. Until this form is received and processed by Monroe County Purchasing, electronic access to the specified contract by vendor users cannot be provided.

Step by step instructions for the Form are also included.

Monroe County Electronic Submission Notice

Monroe County encourages the electronic submission of contracts and all associated documents as this method expedites the process, reduces the amount of paper materials involved in the contract management process, and minimizes the possibility of clerical errors.

By submitting a contract and related documents electronically through the Monroe County Contract Management System (ContractHQ), it is unnecessary to forward any materials to the office of Purchasing and Central Services. However, by submitting electronically, the applicant agrees that:

- The application is made with the full knowledge and consent of the official authorized to enter into contracts on behalf of the municipality or agency (vendor).
- Upon receiving a contract electronically, the vendor shall comply with all applicable federal, state, and local statutes, rules and regulations.
- The contract will be developed based upon the information gathered in the contract building process and contained within the final contract. The fully executed contract and related documents are the only documents binding on the parties.

Before any contract is entered into by a municipality or agency (vendor), the authorized signing official should read and agree to abide by provisions of the following documents, which become a part of resulting contracts.

It is important to note that Monroe County may suspend funding, in whole or in part, terminate funding for, or impose another sanction on a vendor if it appears that the electronic submission of a contract or related documents did not comply with the requirements. Monroe County Purchasing and Central Services strongly recommends that the vendor print and review pertinent documents, ensure the review of the documents and signed approval by the authorized signing official, and retain the documents for future reference.



**Monroe County Purchasing Department
VENDOR MASTER REQUEST FORM**

ContractHQ

PLEASE EMAIL OR FAX COMPLETED FORM TO THE MONROE COUNTY PURCHASING DEPARTMENT

Email to: mcpurchasing@monroecounty.gov Email subject: **ContractHQ** Fax: (585) 753-1104

Purpose of Request (Check One)

Create New Vendor Record Change Existing Vendor Record Add/Delete User

(NOTE: If this is a change request, please provide Vendor Name and the information to be changed.)

Vendor Account Information

Vendor Name _____ Vendor Name 2 _____

Vendor Address Information (New Vendor or Change Existing Vendor)

Address 1 _____ Address 2 _____
 City, State _____ Zip Code _____
 Telephone _____ Fax _____
 Social Security Number or Federal Tax ID Number _____

User Contact Information (New Vendors Only)

Program Contact Name _____ Position Title _____ Phone # _____ Email _____	Other: Name _____ Position Title _____ Phone # _____ Email _____
Finance Contact Name _____ Position Title _____ Phone # _____ Email _____	Name _____ Position Title _____ Phone # _____ Email _____
Signatory Name _____ Position Title _____ Phone # _____ Email _____	Name _____ Position Title _____ Phone # _____ Email _____

Add/Delete User (Current Vendors Only)

Add New User(s)		Delete User(s)	
User Name _____	_____	User Name _____	_____
Position Title _____	_____		
Phone # _____	_____	User Name _____	_____
Email _____	_____		
User Name _____	_____	User Name _____	_____
Position Title _____	_____		
Phone # _____	_____	User Name _____	_____
Email _____	_____		
User Name _____	_____	User Name _____	_____
Position Title _____	_____		
Phone # _____	_____		
Email _____	_____		

Requestor Information

Requestor Name/Title _____ Email _____
 Notes/Comments _____



FORM COMPLETION INSTRUCTIONS
 VENDOR MASTER REQUEST FORM

ContractHQ

PLEASE EMAIL OR FAX COMPLETED FORM TO THE MONROE COUNTY PURCHASING DEPARTMENT

Email to: mcpurchasing@monroecounty.gov Email subject: ContractHQ

Fax: (585) 753-1104

PURPOSE OF REQUEST (CHECK ONE)

- Create New Vendor Record** Place a checkmark in this box if this is a request to create a new Vendor Master Record.
- Change Existing Vendor Record** Place a checkmark in this box if this is a request to change information regarding an existing Vendor Master Record. For information to be changed include only information to be changed.
- Add or Delete User(s) (Current Vendors Only)** To add new users, include your vendor name in the "Vendor Account Information" section and complete all contact information in the "Add New User(s)" section. To delete users, include your vendor name in the "Vendor Account Information" section and indicate which user(s) are to be deleted.

VENDOR ACCOUNT INFORMATION

Name Enter the name of the Vendor for which the new Vendor Master is being created.

VENDOR ADDRESS INFORMATION (NEW VENDOR OR CHANGE OF EXISTING VENDOR)

Enter the address information for the vendor for whom the Vendor Master is being created.

- Address 1** Enter the street address and number address of the vendor for whom the new Vendor Master is being created. NOTE: Maximum of 35 characters allowed in this field.
- Address 2** Enter any 2nd line address information, if appropriate.
- City, State** Enter the city and state associated with the vendor's address.
- Zip Code** Enter the postal (zip) code associated with the vendor's address.
- Phone #** Enter the telephone number associated with the vendor.
- Fax** Enter the fax number associated with the vendor's address.
- Social Security Number or Fed. Tax Id. Number** Enter the Social Security Number, if applicable ("Doing Business As," (DBA) Vendor, or Sole Proprietorship. If the vendor for whom the Vendor Master is being created is a corporation or not-for-profit, enter the Federal Tax ID number.

USER CONTACT INFORMATION (NEW VENDORS ONLY)

- Name** Enter the name of the user
- Title** Enter the title of the user
- Phone #** Enter the telephone number of the user
- Email** Enter the email address of the user

Enter the program contact, finance contact, and signatory name where specified

ADD/DELETE USER (CURRENT VENDORS ONLY)

To be filled out by vendors who already have a current ContractHQ account. Enter all applicable data pertaining to the user[s] that should be added or deleted.

REQUESTOR

- Requestor Name/Title** Enter the name and title of the person requesting creation of the Vendor Master Request.
- Requestor Email** Enter the email address of the person requesting creation of the Vendor Master Request.
- Notes/Comments** Provide any additional information relevant to the creation of the Vendor Master Request.



**Monroe County Purchasing Department
VENDOR CONTRACT ACCESS AND ROUTING REQUEST FORM**

ContractHQ

PLEASE EMAIL OR FAX COMPLETED FORM TO THE MONROE COUNTY PURCHASING DEPARTMENT
Email to: mcpurchasing@monroecounty.gov **Email subject:** ContractHQ **Fax:** (585) 753-1104

Vendor Account Information

Vendor Name _____ Vendor Name 2 _____

Contract Information

Name of Contract _____

Contract Start Date _____ Contract End Date _____

Name of Monroe County Department/Divison Funding Contract _____

Contract Approval Routing Information

**You must enter the user routing information in the order the contract must flow through your organization.
 A user's name may be entered more than once if the contract is reviewed by that user multiple times.
 Last user indicated must be the signatory for your organization.**

User Name _____ Email _____
 Position Title _____ Phone # _____

User Name _____ Email _____
 Position Title _____ Phone # _____

User Name _____ Email _____
 Position Title _____ Phone # _____

User Name _____ Email _____
 Position Title _____ Phone # _____

User Name _____ Email _____
 Position Title _____ Phone # _____

User Name _____ Email _____
 Position Title _____ Phone # _____

Other User(s) Access to Contract

Enter other users needing access to the contract. An example might be a staff member needing to enter performance measurement data.

User Name _____ Email _____
 Position Title _____ Phone # _____

User Name _____ Email _____
 Position Title _____ Phone # _____

User Name _____ Email _____
 Position Title _____ Phone # _____

Requestor Information

Requestor Name/Title _____ Email _____

Notes/Comments _____



FORM COMPLETION INSTRUCTIONS
VENDOR CONTRACT ACCESS AND ROUTING REQUEST FORM

ContractHQ

PLEASE EMAIL OR FAX COMPLETED FORM TO THE MONROE COUNTY PURCHASING DEPARTMENT
Email to: mcpurchasing@monroecounty.gov Email subject: ContractHQ Fax: (585) 753-1104

PURPOSE OF CONTRACT ACCESS AND ROUTING REQUEST

The purpose of the contract access and routing request is to grant users access to individual contracts, and to notify Monroe County Purchasing and Central Services of your organization's internal routing required to approve and execute Department of Huma

WHEN SHOULD A CONTRACT ACCESS AND ROUTING REQUEST BE COMPLETED

A contract access and routing request must be completed for each contract and be submitted annually to Monroe County.

VENDOR ACCOUNT INFORMATION

Name Enter the name of the Vendor for which the contract routing is being created.

CONTRACT INFORMATION

Name of Contract Enter the common name the contracted service/program is referred to.

Contract Start Date Enter the date the service/program begins.

Contract End Date Enter the date the service/program ends.

Name of Monroe County

Department/Division Enter the name[s] of the County Department or Division that is funding the service/program.

Funding Contract

CONTRACT APPROVAL ROUTING INFORMATION

User Name Enter the name[s] of your organization's users in the proper order that must view and approve this contract. Your organization's signatory should be the final user on the list.

Position Title Enter the position title for each user identified.

Email Enter the email address of the user.

Phone # Enter the telephone number of the user.

Note: If a user has not been set up in the ContractHQ system, go to the "Vendor Master Request Form" in this workbook and follow the instructions to have a user added to the system. Submit the master request form along with your access and routing request to the Monroe County Purchasing Department.

OTHER USER(S) ACCESS TO THE CONTRACT

Enter other users needing access to the contract. An example may be a staff member required to enter performance measurement data, yet not required to approve the contract.

User Name Enter the name[s] of your organization's other users needing access to the contract.

Position Title Enter the position title for each user identified.

Email Enter the email address of the user.

Phone # Enter the telephone number of the user.

REQUESTOR INFORMATION

Requestor Name/Title Enter the name and title of the person requesting creation of the contract access and routing.

Requestor Email Enter the email address of the person requesting creation of the contract access and routing.

Notes/Comments Provide any additional information relevant to the contract access and routing.