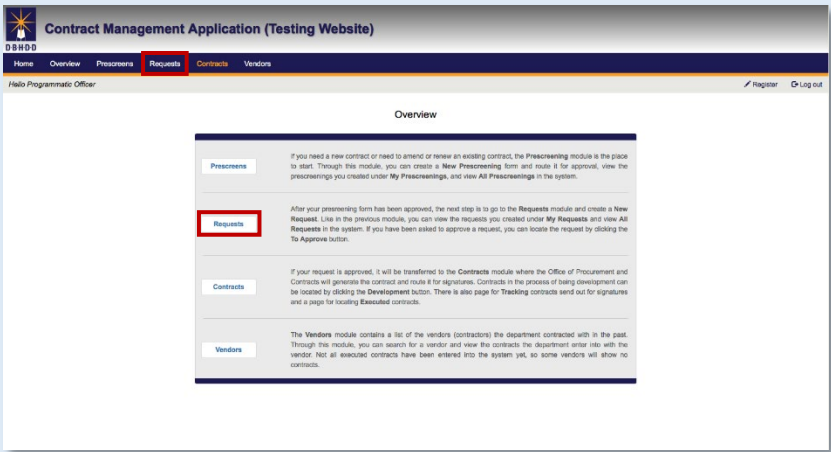
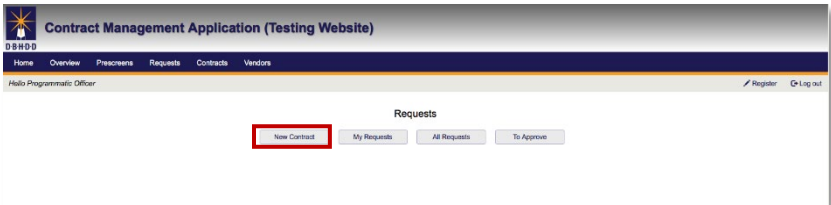
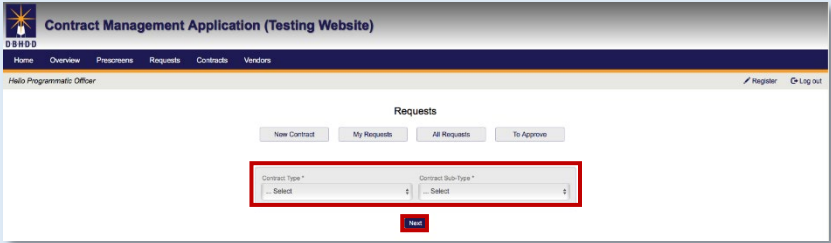



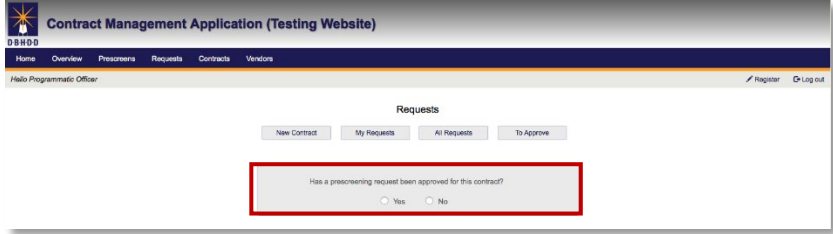

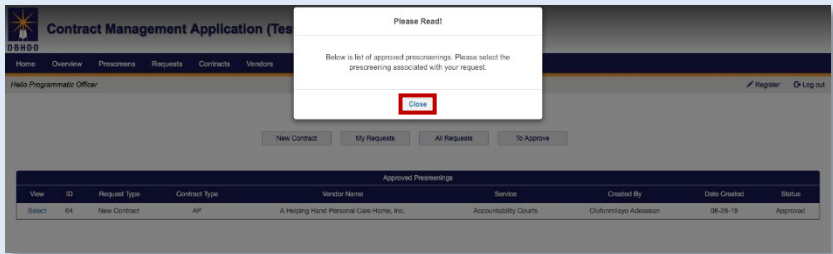
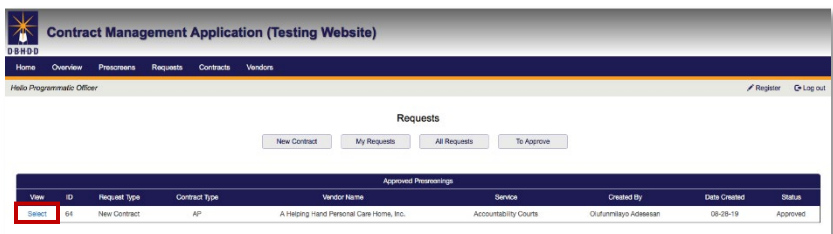
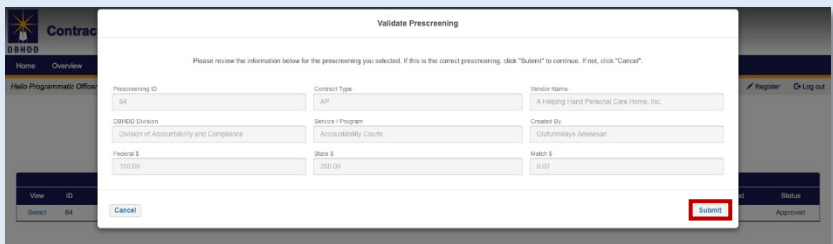


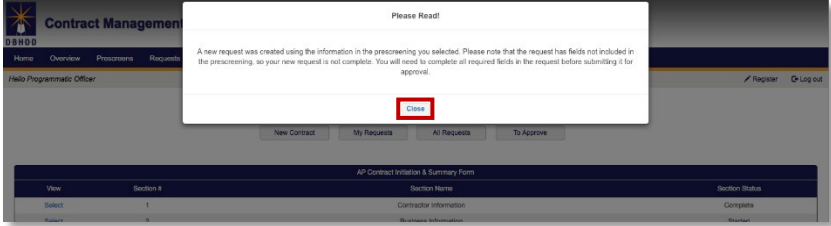
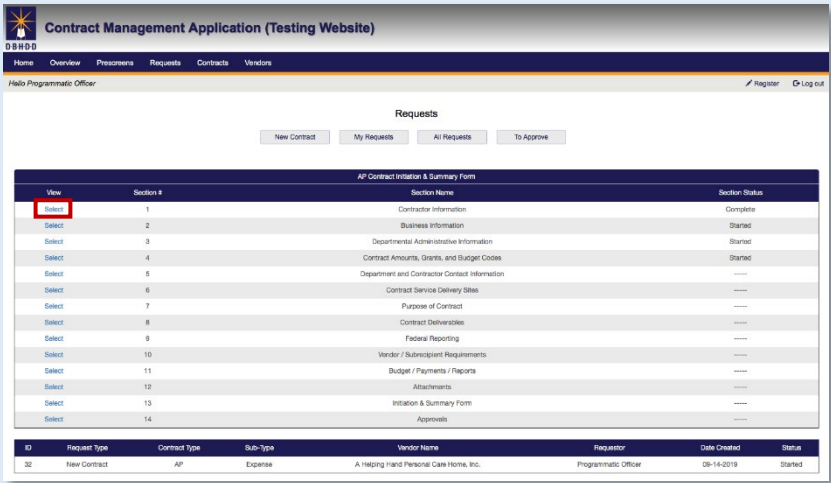
Creating New AP Contract Requests



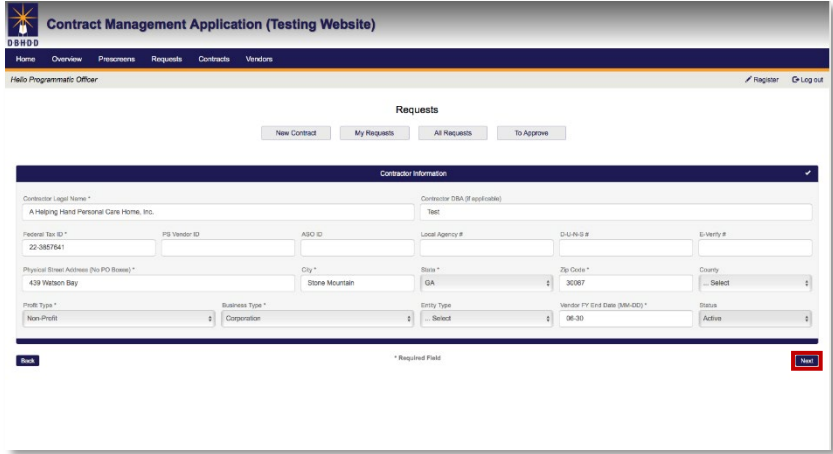
SUMMARY


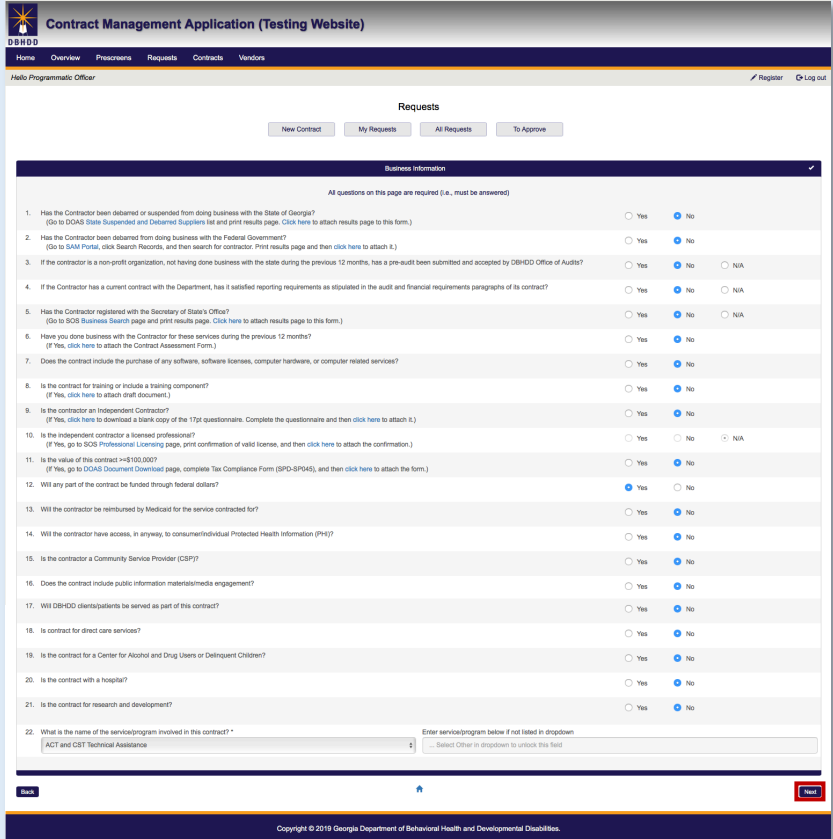

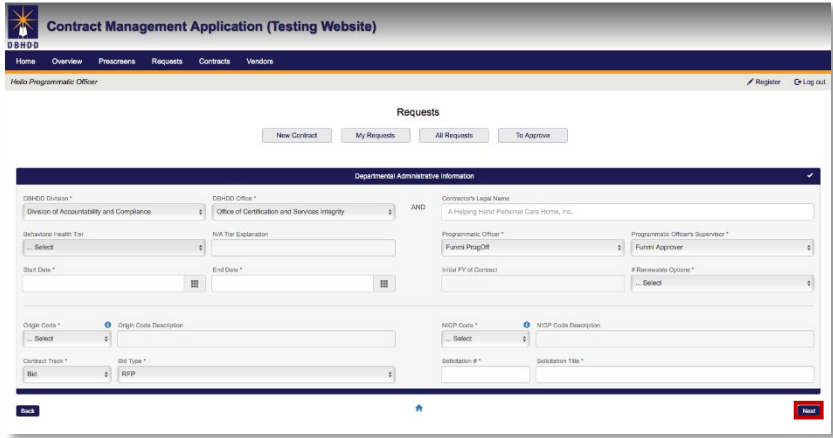
This job aid shows how to create a new AP Contract Request.


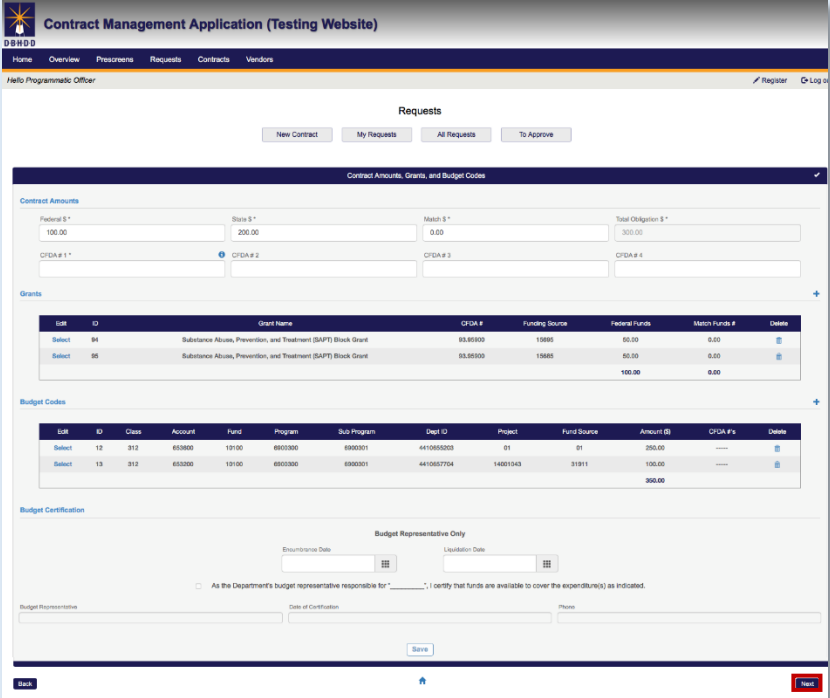
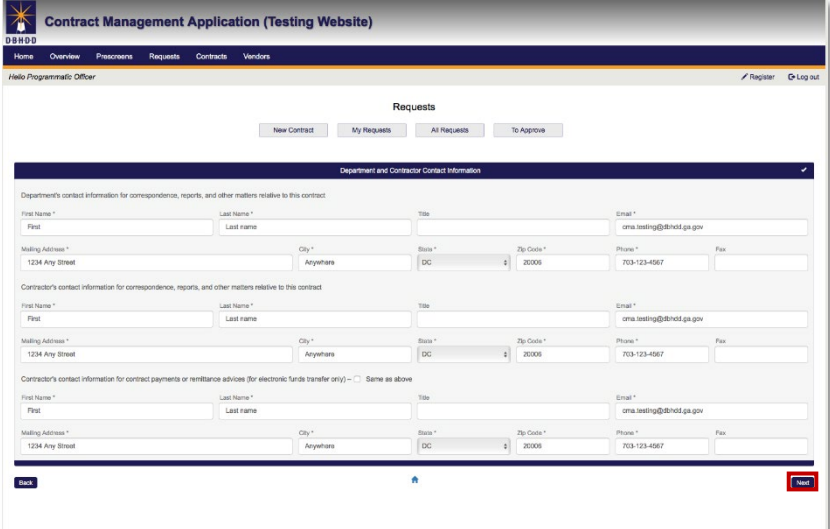
Step	Action	Visual
1	From the Overview page, select the Requests button or the Requests link.	
2	From the Requests page, select the New Contract button.	
2a	Select the dropdown arrows to choose the Contract Type and Contract Sub-Type . Select AP from the Contract Type dropdown menu and the relevant option from the Contract Sub-Type dropdown menu. Select the Next button.	

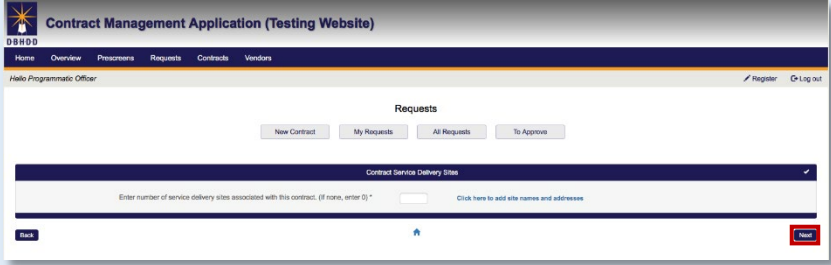
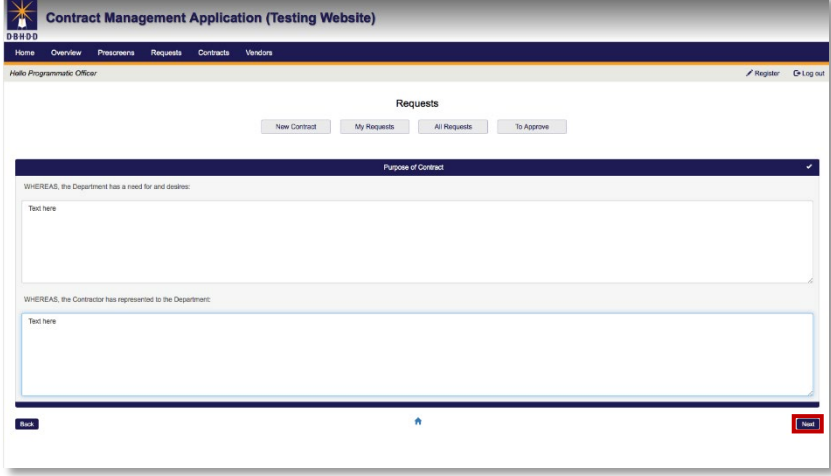

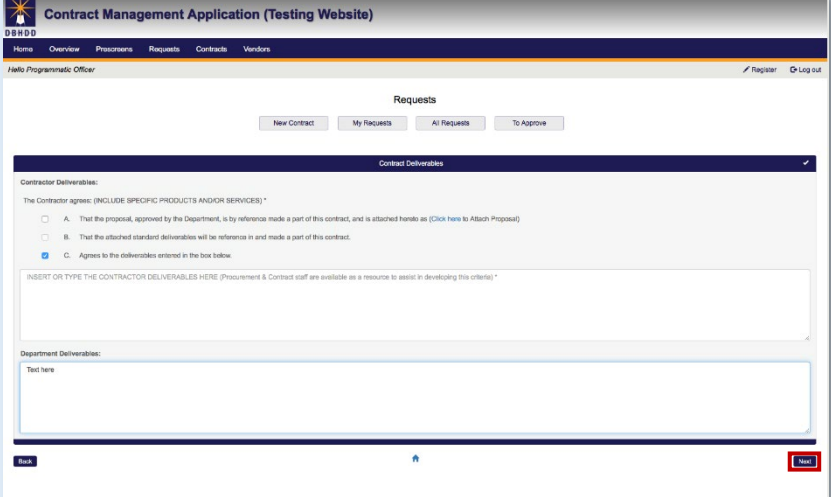
Step	Action	Visual																		
<p>2b</p>	<p>The prescreening confirmation question appears.</p> <p>The prescreening confirmation requires a Yes or No response to determine whether a Prescreen was approved.</p> <p>Select Yes to the question “Has a prescreening request been approved for this contract?”</p> <p> NOTE: Regional Contracts do not require a Prescreen since those are initiated by the Contract group.</p>																			
<p>2c</p>	<p>The following Please Read! message appears: “Below is a list of approved prescreenings. Please select the prescreening associated with your request.”</p> <p>Select the Close button. A list of approved Prescreens display.</p> <p> NOTE: If the response is No, the system will direct you to complete a Prescreen to continue the new AP Contract request.</p>	 <table border="1" data-bbox="678 951 1484 1010"> <thead> <tr> <th>View</th> <th>ID</th> <th>Request Type</th> <th>Contract Type</th> <th>Vendor Name</th> <th>Service</th> <th>Created By</th> <th>Date Created</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>Select</td> <td>64</td> <td>New Contract</td> <td>AP</td> <td>A Helping Hand Personal Care Home, Inc.</td> <td>Accountability Courts</td> <td>Olufermiyayo Adesesan</td> <td>08-28-19</td> <td>Approved</td> </tr> </tbody> </table>	View	ID	Request Type	Contract Type	Vendor Name	Service	Created By	Date Created	Status	Select	64	New Contract	AP	A Helping Hand Personal Care Home, Inc.	Accountability Courts	Olufermiyayo Adesesan	08-28-19	Approved
View	ID	Request Type	Contract Type	Vendor Name	Service	Created By	Date Created	Status												
Select	64	New Contract	AP	A Helping Hand Personal Care Home, Inc.	Accountability Courts	Olufermiyayo Adesesan	08-28-19	Approved												
<p>3</p>	<p>To convert a Prescreen to a New Request, choose the Prescreen from the Approved Prescreenings list by selecting the Select link on the far left of the Prescreen.</p>																			
<p>3a</p>	<p>The Validate Prescreening message appears: “Please review the information below for the prescreening you selected. If this is the correct prescreening, click ‘Submit’ to continue. If not, click ‘Cancel.’”</p> <p>Select the Submit button.</p>																			


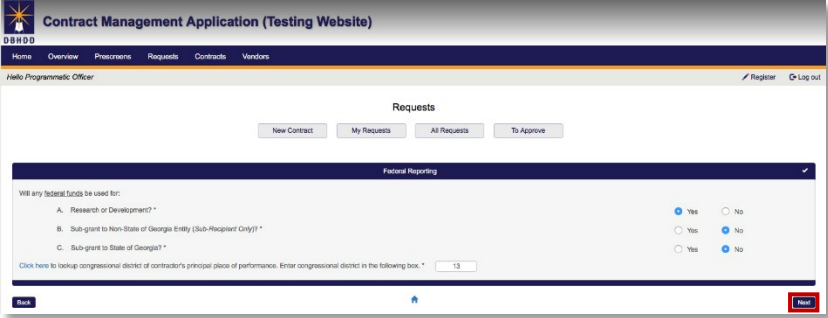

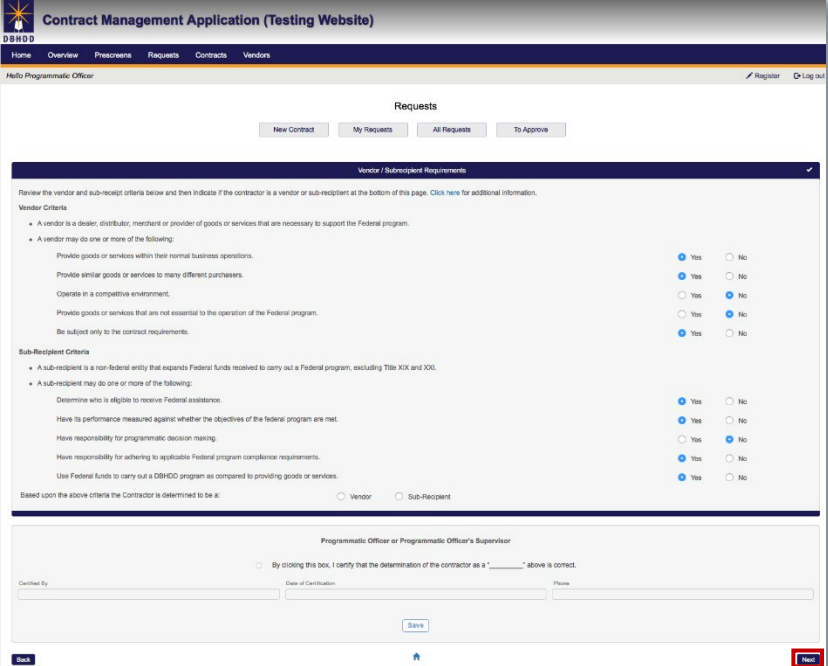
Step	Action	Visual
<p>3b</p>	<p>The Please Read! message appears stating: “A new request was created using the information in the prescreening you selected. Please note that the request has fields not included in the prescreening, so your new request is not complete. You will need to complete all required fields in the request before submitting it for approval.”</p> <p>Select the Close button.</p>	
<p>4</p>	<p>The AP Contract Initiation & Summary Form list displays.</p> <p>Select any section from the AP Contract Initiation & Summary Form or start from Section #1 to complete the request.</p> <p>The Section Status will update as you progress through each section and may display as:</p> <ul style="list-style-type: none"> • Complete – Completed section, no additional action required • Started – Incomplete section, started and additional action required • ‘-----’ – Incomplete section, action required • Certification Required – Incomplete section, certification required from the appropriate role <p>Select the Select link to the far left of the #1 section row. You can review or edit the section information.</p> <p>The sections may include auto-populated information from the selected Prescreen.</p> <p>Located on the section pages are:</p> <ul style="list-style-type: none"> • Back button — Navigates to the previous screen • Home icon — Navigates to the home screen • Next button — Navigates to the next section/screen 	


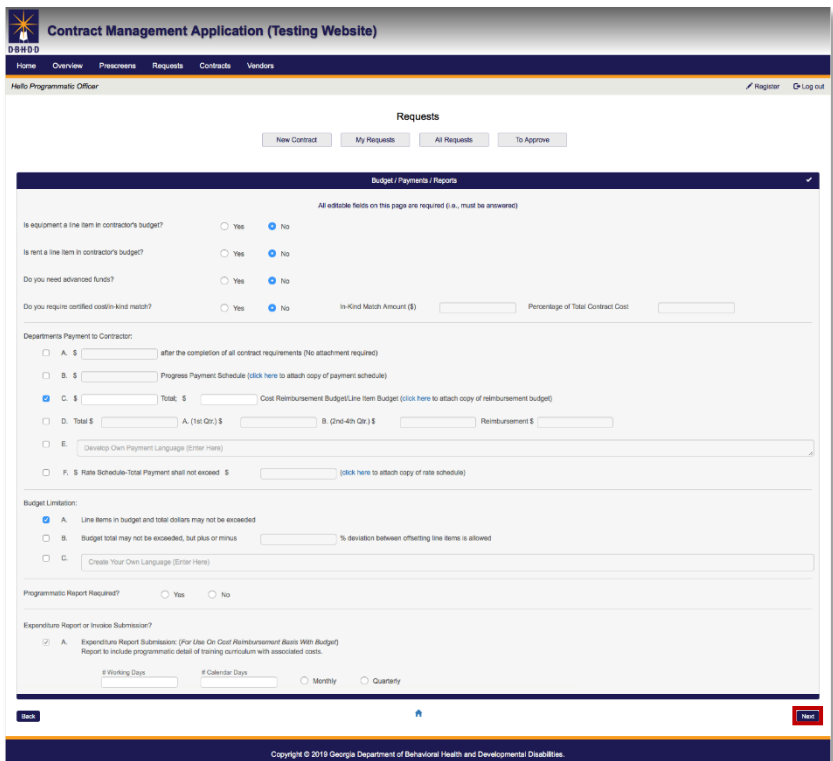

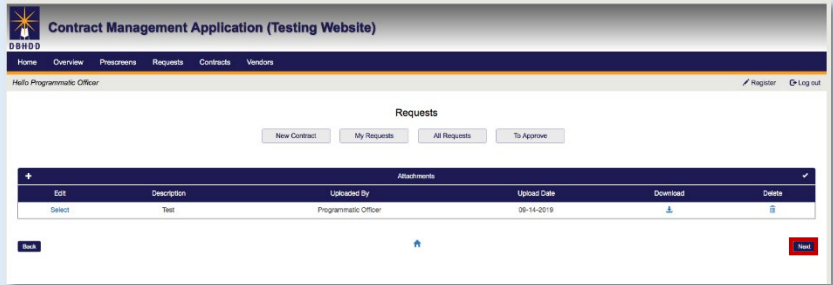
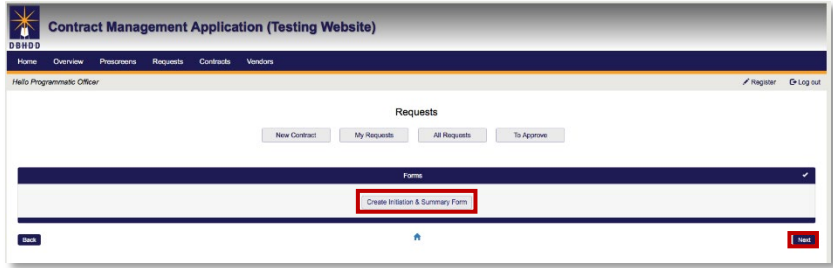
Step	Action	Visual
	<ul style="list-style-type: none"> ✓ Validation icon — Identifies errors or omissions in the section <p> NOTE: The Requisition Number/Transfer Request section appears after the Approvals section is complete.</p>	
<p>5</p> <p>The first section is the Contractor Information. This includes auto-populated information from the Prescreen.</p> <p>Review the contract data for accuracy, and enter corrections, if applicable.</p> <p>Select the Next button.</p> <p> NOTE: By default, this Section Status may display as Complete because the Prescreen information populated all required fields.</p>		 <p>The screenshot shows the 'Contract Management Application (Testing Website)' interface. The user is logged in as 'Helo Programmatic Officer'. The 'Requests' section is active, with buttons for 'New Contract', 'My Requests', 'All Requests', and 'To Approve'. The 'Contractor Information' form is displayed, containing the following fields:</p> <ul style="list-style-type: none"> Contractor Legal Name: A Helping Hand Personal Care Home, Inc. Contractor DBA (if applicable): Test Federal Tax ID: 22-3887364 PS Vendor ID: [Empty] ASBO ID: [Empty] Local Agency #: [Empty] DLAHS #: [Empty] E-Verify #: [Empty] Physical Street Address (No PO Boxes): 439 Watson Bay City: Stone Mountain State: GA Zip Code: 30087 County: [Dropdown menu] Profit Type: Non-Profit Business Type: Corporation Entity Type: [Dropdown menu] Vendor FY End Date (MM-DD): 06-30 Status: Active <p>A 'Next' button is visible at the bottom right of the form, and a 'Required Field' asterisk is present at the bottom.</p>


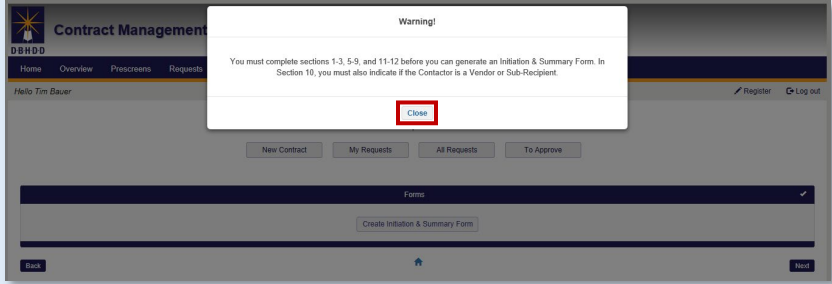
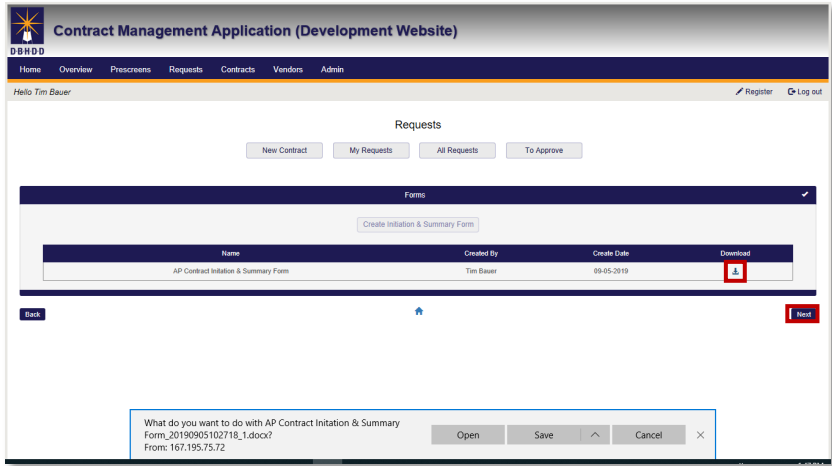
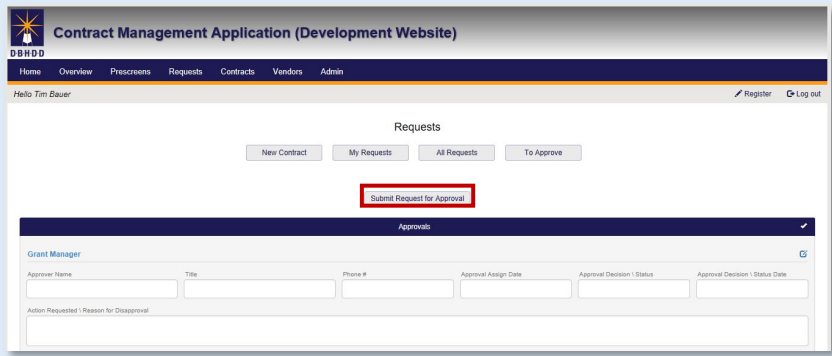
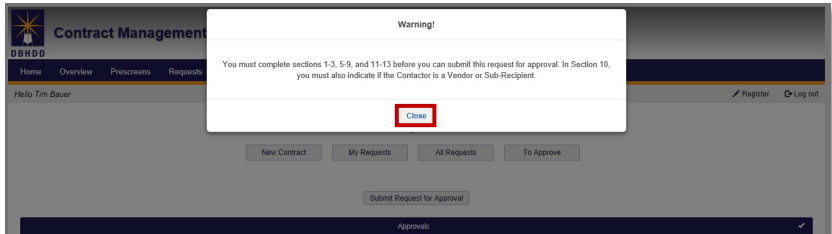
Step	Action	Visual
<p>6</p> <p>The Business Information section includes auto-populated information from the Prescreen.</p> <p>Select Yes, No, or N/A for each question listed in the section.</p> <p>Select the Next button.</p> <p> NOTE: The Business Information section will require documentation (an attachment) based on the responses to specific questions. You can upload (attach) specific documentation for each question by selecting the click here link.</p>		
<p>7</p> <p>The Departmental Administrative Information section includes auto-populated information from the Prescreen.</p> <p>Complete and review the departmental administrative data for accuracy, and enter corrections, if applicable.</p> <p>Select the Next button.</p> <p> NOTE: The i Information icon provides additional details about completing the field.</p>		

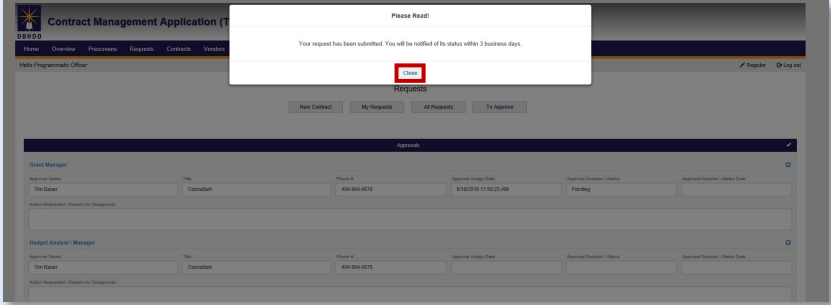
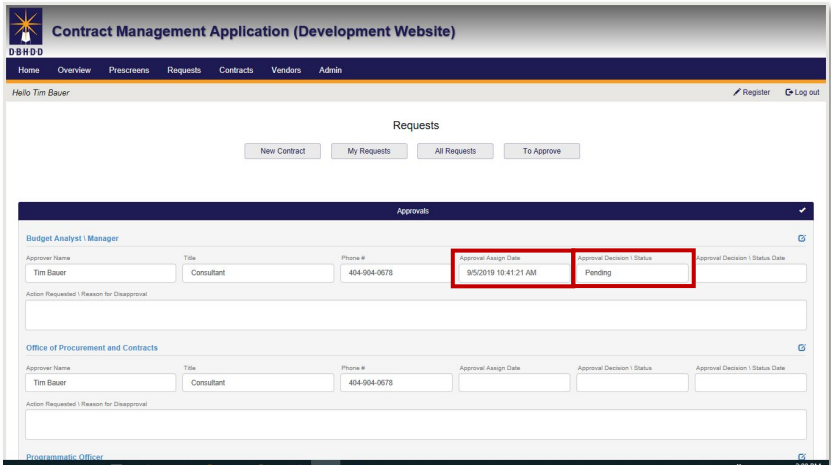
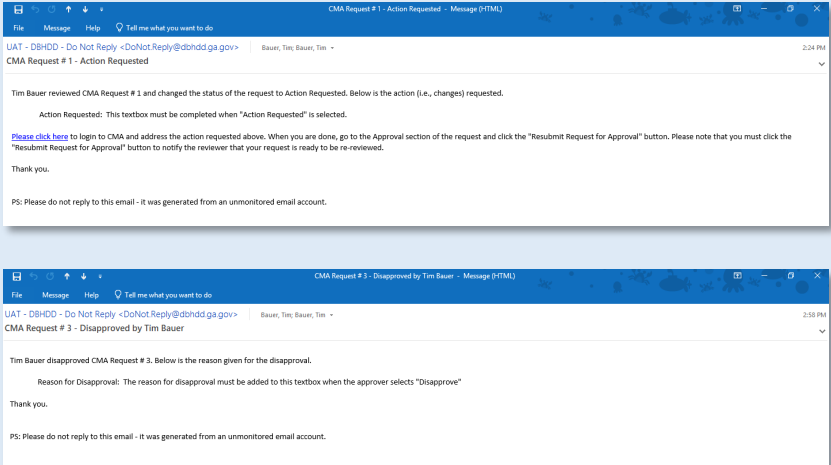
Step	Action	Visual
<p>8</p> <p>The Contract Amounts, Grants, and Budget Codes section includes auto-populated information from the Prescreen.</p> <p>Complete and review the data for accuracy, and enter corrections, if applicable.</p> <p>The Budget Representative Only section requires certification.</p> <p>Select the Next button.</p> <p> NOTE: The Section Revision History link is present when changes, such as amounts, are made to the prescreening data.</p>		
<p>9</p> <p>In the Department and Contractor Contact Information section, complete each required (*) data field.</p> <p>Select the Next button.</p>		


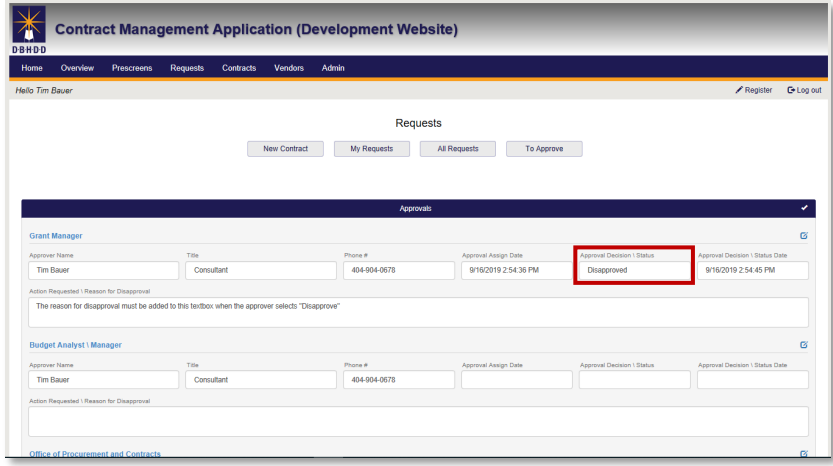
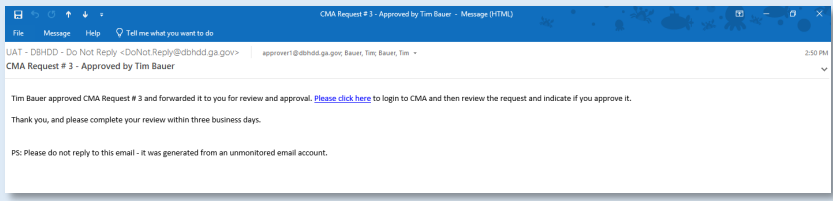
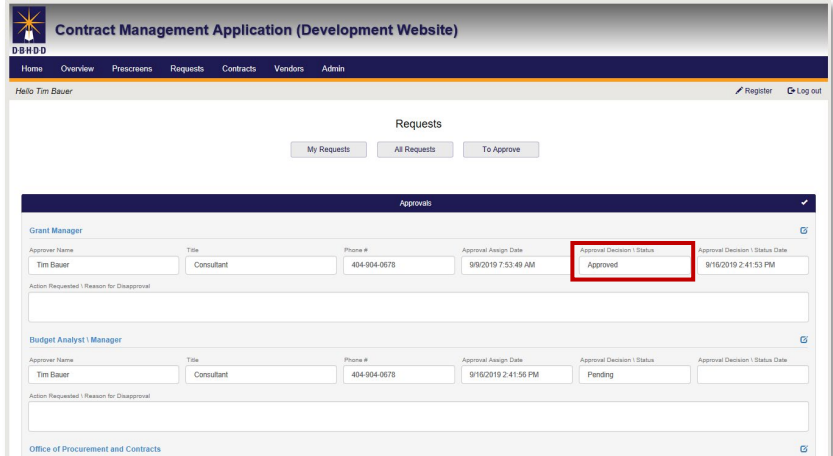
Step	Action	Visual
10	<p>In the Contract Service Delivery Sites section, enter the number of service delivery sites. If there are none, enter 0. Select the link to add a name and address for each service delivery site, if applicable.</p> <p>Select the Next button.</p>	
11	<p>In the Purpose of Contract section, complete each data field.</p> <p>Select the Next button.</p>	
12	<p>In the Contract Deliverables section, complete each required (*) data field.</p> <p>Select the Next button.</p> <p> NOTE: This section may require a proposal (attachment) based on the responses to specific questions. You can upload (attach) specific documentation for each question.</p>	


Step	Action	Visual
<p>13</p>	<p>In the Federal Reporting section, complete each required (*) data field.</p> <p>Select the Next button.</p> <p> NOTE: This section needs to be completed in its entirety when federal funding is included.</p>	
<p>14</p>	<p>In the Vendor / Subrecipient Requirements section:</p> <ul style="list-style-type: none"> • Select Yes or No to each statement listed in the section. • Select Vendor or Sub-Recipient for the contractor criteria statement. <p>The Programmatic Officer section requires certification.</p> <p>Select the Next button.</p> <p> NOTE: This section needs to be completed in its entirety.</p>	

Step	Action	Visual
<p>15</p> <p>In the Budget / Payments / Reports section, complete each required data field and question.</p> <p>Select the Next button.</p> <p> NOTE: This section will require documentation (an attachment) based on the responses to specific questions. You can upload (attach) specific documentation for each question.</p>		
<p>16</p> <p>The Attachments section displays a list of all attachments uploaded to the request.</p> <p>Review the list for accuracy and/or add any documentation needed.</p> <p>Select the Next button.</p> <p> NOTE: The + plus icon opens the Upload File field to add an attachment.</p>		
<p>17</p> <p>In the Forms section, select the Create Initiation & Summary Form button to create the AP Contract Initiation & Summary Form.</p> <p>Select the Create Initiation & Summary Form button to create the AP Contract Initiation and Summary Form.</p> <p>Select the Next button.</p>		

Step	Action	Visual
17a	<p> NOTE: If any sections are incomplete, a Warning! message appears indicating which sections must be completed.</p> <p>Select the Close button and complete the sections noted in the Warning! message.</p>	
18	<p>When the AP Contract Initiation & Summary Form displays, select the download icon and open or save the form as a Microsoft Word document to review.</p> <p>Select the Next button.</p>	
19	<p>The Approvals section displays a list of all required approvers by title and/or name.</p> <p>Select the Submit Request for Approval button.</p>	
19a	<p>If any sections are incomplete, a Warning! message appears indicating which sections still need to be completed.</p> <p>Select the Close button and complete the sections noted in the Warning! message.</p>	

Step	Action	Visual
19b	Select the Close button below the Please Read! message stating: “Your request has been submitted. You will be notified of its status within 3 business days.”	 <p>The screenshot shows the 'Contract Management Application (Development Website)' interface. A modal window titled 'Please Read!' is displayed in the center, containing the text: 'Your request has been submitted. You will be notified of its status within 3 business days.' Below the text is a red 'Close' button. The background shows the 'Requests' section of the application with a table of approval requests.</p>
19c	After successful submission, the Approval Assign Date field is time stamped, the Approval Decision \ Status field reads as Pending , and approval-required email(s) are sent.	 <p>The screenshot shows the 'Requests' page in the 'Contract Management Application (Development Website)'. The 'Approval Assign Date' field is populated with '9/5/2019 10:41:21 AM' and the 'Approval Decision \ Status' field is 'Pending'. Both fields are highlighted with red boxes. The page also shows a table of approval requests for 'Budget Analyst \ Manager' and 'Office of Procurement and Contracts'.</p>
20	Each approver receives an email to respond to the request. If an approver selects Action Requested or Disapproved , a note of the needed changes must be entered, and no other approvals are allowed until those changes are complete.	 <p>The first screenshot shows an email titled 'CMA Request # 1 - Action Requested - Message (HTML)'. The body of the email states: 'Tim Bauer reviewed CMA Request # 1 and changed the status of the request to Action Requested. Below is the action (i.e., changes) requested. Action Requested: This textbox must be completed when "Action Requested" is selected. Please click here to login to CMA and address the action requested above. When you are done, go to the Approval section of the request and click the "Resubmit Request for Approval" button. Please note that you must click the "Resubmit Request for Approval" button to notify the reviewer that your request is ready to be re-reviewed. Thank you. PS: Please do not reply to this email - it was generated from an unmonitored email account.'</p> <p>The second screenshot shows an email titled 'CMA Request # 3 - Disapproved by Tim Bauer - Message (HTML)'. The body of the email states: 'Tim Bauer disapproved CMA Request # 3. Below is the reason given for the disapproval. Reason for Disapproval: The reason for disapproval must be added to this textbox when the approver selects "Disapprove" Thank you. PS: Please do not reply to this email - it was generated from an unmonitored email account.'</p>

Step	Action	Visual
<p>20a</p> <p>The requestor receives a notification of the decision and can take corresponding action on the request. If any change is made to the request, the application restarts the approval process.</p> <p>Select the Home icon.</p> <p> NOTE: Only the Contract Manager can change an approval, which resets all required approvals. If you are the requestor and required approver, you can complete the approval in the Approvals section.</p>		 <p>The screenshot shows the 'Contract Management Application (Development Website)' interface. Under the 'Approvals' section, there are two rows for 'Grant Manager' and 'Budget Analyst Manager'. The 'Grant Manager' row shows 'Approval Decision Status' as 'Disapproved' (highlighted with a red box). The 'Budget Analyst Manager' row shows 'Approval Decision Status' as 'Pending'.</p>
<p>20b</p> <p>If an approver selects Approved, then the requestor will receive an email stating that the request has been approved.</p>		 <p>The screenshot shows an email notification with the subject 'CMA Request # 3 - Approved by Tim Bauer'. The body text reads: 'Tim Bauer approved CMA Request # 3 and forwarded it to you for review and approval. Please click here to login to CMA and then review the request and indicate if you approve it. Thank you, and please complete your review within three business days. PS: Please do not reply to this email - it was generated from an unmonitored email account.'</p>
<p>20c</p> <p>The Approvals Decision Status can also be viewed on the Approvals subsection.</p>		 <p>The screenshot shows the same 'Contract Management Application (Development Website)' interface. Under the 'Approvals' section, the 'Grant Manager' row now shows 'Approval Decision Status' as 'Approved' (highlighted with a red box). The 'Budget Analyst Manager' row still shows 'Approval Decision Status' as 'Pending'.</p>

Step	Action	Visual
<p>21</p>	<p>The Requisition Number/Transfer Request section is present after all approvals are granted.</p> <p>Enter the Requisition Number and save. The contract number auto-populates and the new AP Contract request is ready for the Office of Procurement and Contract staff to authorize a transfer to the Contract Module for development.</p> <p> NOTE: If the requestor submitted the requisition, then the Requisition Number is available to him/her.</p>	