

Contract Management Application  
(CMA) Training for Non-Hospital Staff

**BE D·B·H·D·D**

Georgia Department of Behavioral Health & Developmental Disabilities

October 23, 2019



# CMA Training: What We'll Cover

1.

**BE AWARE:** Identify the benefits of using CMA.

2.

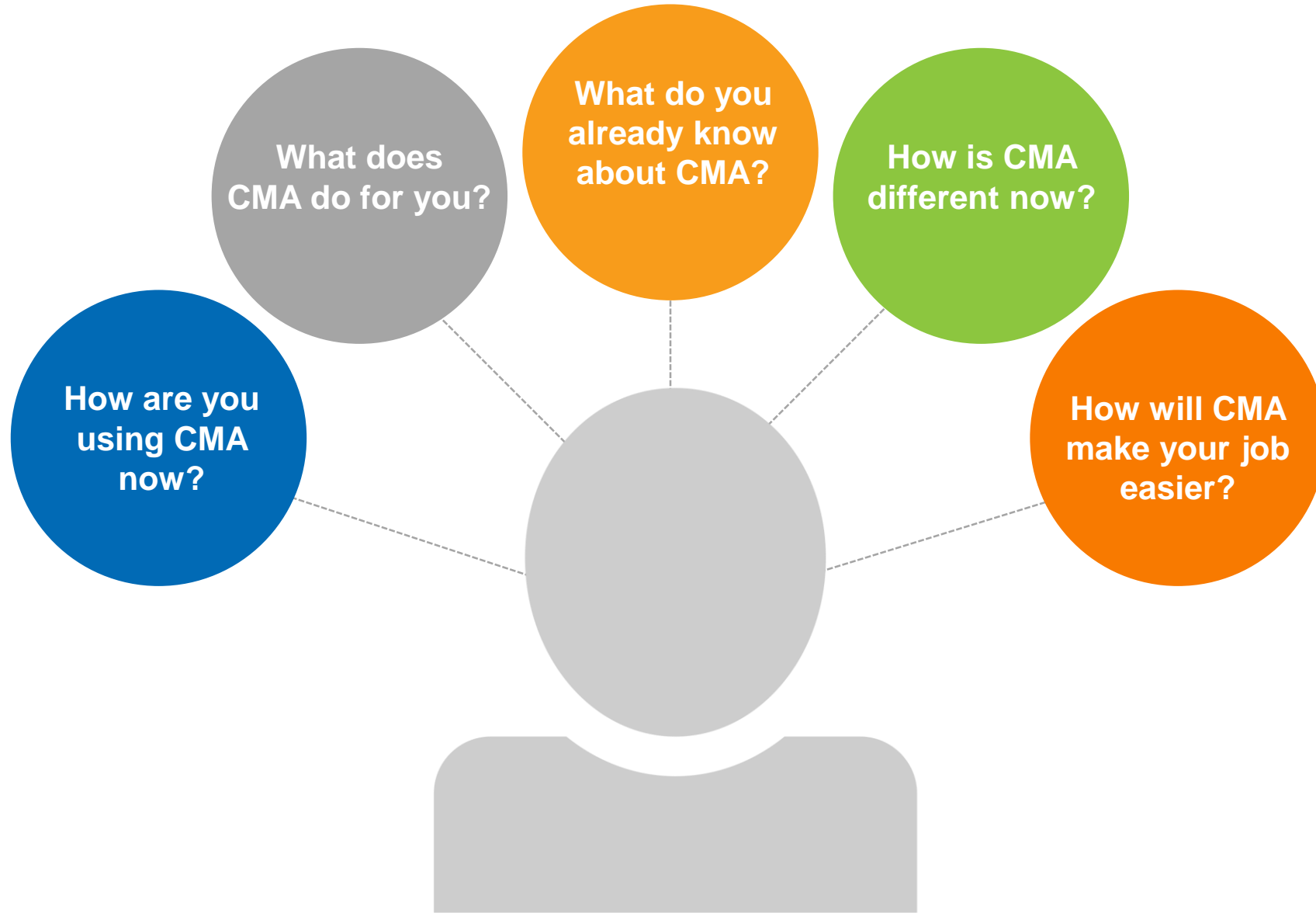
**BE PREPARED:** Become oriented to the CMA interface, workflows, and features.

3.

**BE CAPABLE:** Simulate accessing and using CMA to:

- Request or Edit a Prescreen for an AP Contract
- Request or Edit a new AP Contract
- Provide a Budget Recommendation for an AP Contract Prescreen Request
- Review or Approve an AP Contract Request

# Opening Discussion



# Vision and Summary

## The Contracts Management Application (CMA) will:

- Automate all aspects of contract management (prescreen, request, renew, amend, store, and manage contracts).

- Access to a centralized platform for all contract management processes for internal and external users.

- Oversight and coordination of contract related activities.

- Streamline communications, collaboration, and notifications

### Key Benefits:

- Increased Transparency & Visibility
- Improved Efficiencies
  - Time Savings; Faster development
  - Integrated Programmatic Monitoring
- Contract Data Integrity
- Automated & Streamlined Processes
  - System-driven Validations
  - Less Labor Intensive
  - Automated Tracking, Approval Workflow, Budget to Invoicing Reconciliation
- Standardization of processes
- Performance Measurement of KPIs
- Enhanced Reporting

# Contracts Management Application (CMA)

## Benefits

- Visibility & Transparency
- Accountability
- Performance Management
- Programmatic Monitoring
- Automated Processes
- Efficient & Responsive User Interface
- Improved Internal & External Customer Service
- Data Integrity

## Functionality

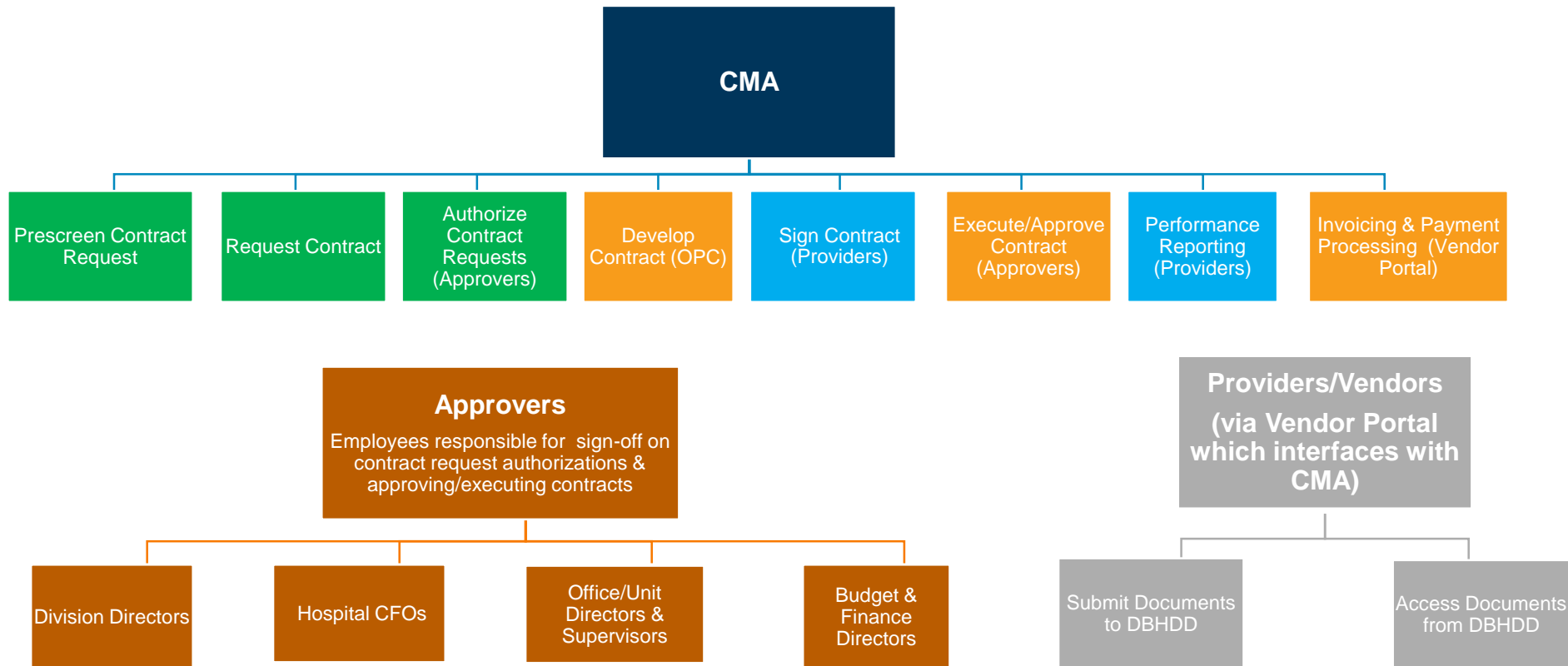
- Automates:
  - Contract Requests
  - Contract Renewals
  - Contract Amendments
  - Contract Approvals
- Reporting
- Invoicing & Payment Processing

## Stakeholders

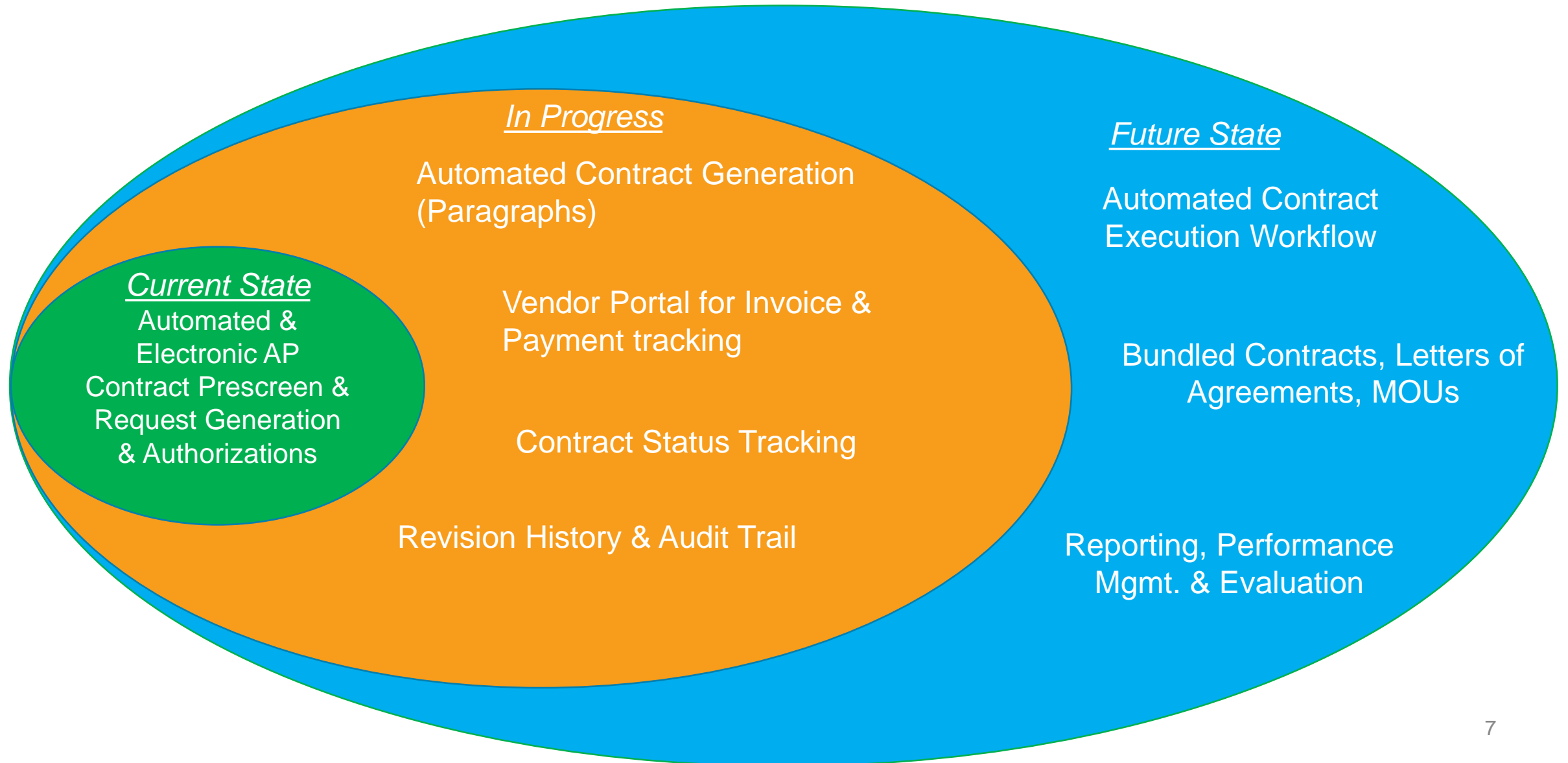
- Office of Procurement & Contracts (OPC)
- DBHDD Divisions, Offices, Programs, Units
- Hospitals
- Vendors/Providers

# Contracts Management Application (CMA) Scope Map

The diagram represents the processes covered in the application. The Vendor portal is a public facing application, accessible by vendors/providers, that will integrate with CMA for contract management, oversight, invoicing, payment processing, and performance management activities



# CMA Objectives: Current versus End State



# Estimated Timeline

Existing State

Automated Contract Requests Generation & Repository

Sept/Oct 2019

- Automated & Electronic AP Contract Prescreening & Requests authorizations

Sept-Dec 2019

- Automated AP Contracts development (with logic driven paragraphs and stipulations)

Jan – June 2020

- Vendor Portal
- Invoicing Repository
- Amendments
- Renewals

Future State

- Contracts for Bundled Services (currently called Regional Contracts)
- Letters of Agreement
  - MOUs



# Success Indicators

Real Time  
Contract Tracking

Reduced &  
Measurable begin  
to end contract  
processes

Accountability and  
transparency in all  
contracts  
processes

Measurable  
Performance  
Indicators

# Performance Measurement Vision

- ❖ Identify KPIs by program type
- ❖ Build Program-specific forms for KPIs
- ❖ Develop reports & dashboards of KPIs
- ❖ Perform Data Analytics of KPIs

- ❖ Identify KPIs by program type

- ❖ Build Program Specific forms and processes for the KPIs

- ❖ Develop reports & dashboards of KPIs

- ❖ Ability to perform Data Analytics of KPIs

- ❖ A shift to Performance Based Contracting will require Key Performance Indicators (KPIs) be identified at the program/service level and collected as part of the Programmatic Reporting process. This should be a combination of self-reports by the providers and Program Officer oversight & monitoring activities data elements. Additionally, Quantitative & Qualitative measures should be considered

# Benefits of Using the CMA System

CMA **automates & streamlines** all aspects of contract management (prescreen, request, renew, amend, store, and manage contracts).

- Provides **visibility** to a **centralized** platform for all contract management processes for internal and external users.

- Provides **oversight** and **coordination** of contract related activities.

# CMA Is a Role-Based System



# CMA Training Organization

Unit 1:  
Registration  
and Account  
Management

Unit 2:  
Request an  
AP Contract  
Prescreen

Unit 3:  
Review &  
Approve an  
AP Contract  
Prescreen

Unit 4:  
Request an  
AP Contract  
for an  
approved  
Prescreen

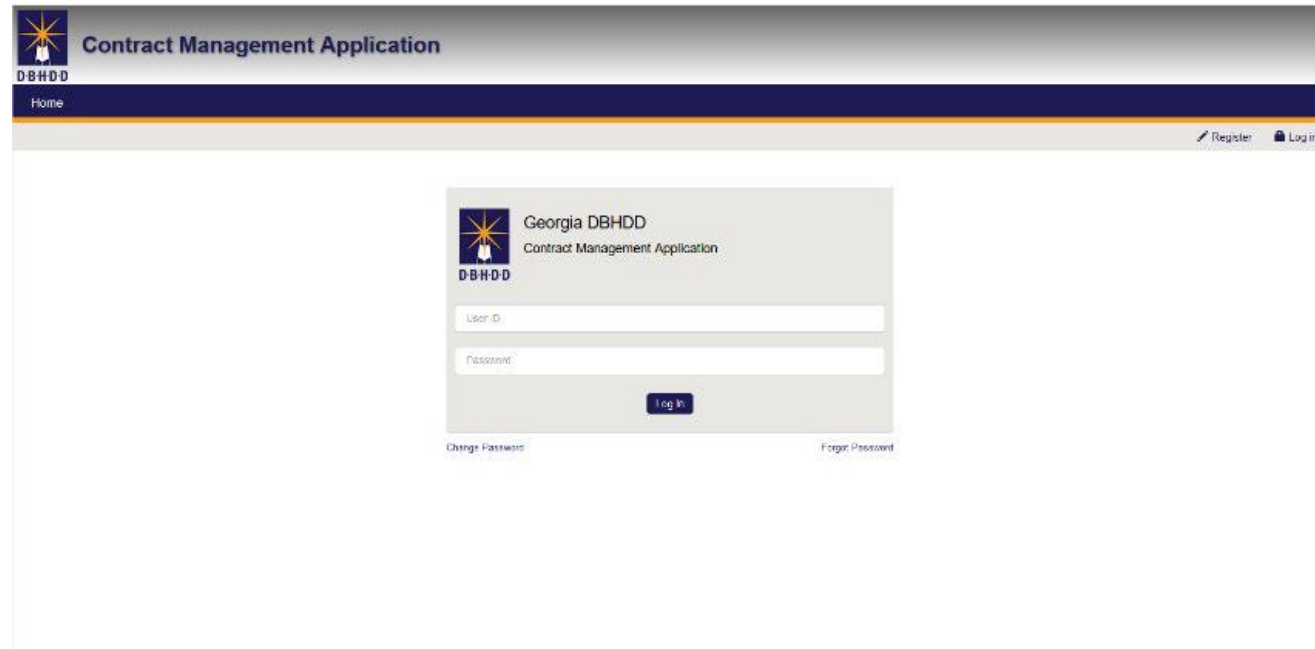
Unit 5:  
Review &  
Approve an  
AP contract  
request

Unit 6: Review  
& Questions

# Unit 1: Registration and Account Management



# Accessing the CMA Homepage



The screenshot shows the homepage of the Georgia DBHDD Contract Management Application. The page has a dark blue header with the DBHDD logo and the text "Contract Management Application". Below the header is a navigation bar with "Home" and links for "Register" and "Log in". The main content area contains a login form with fields for "User ID" and "Password", a "Log In" button, and links for "Change Password" and "Forgot Password".

- Click here to get to the CMA Homepage:  
<https://dbhddapps.dbhdd.ga.gov/CMA/Accounts/AccessRequest.aspx>
- On the **Contract Management Application** home page, select the **Register** link.

Complete all fields in the **Account Registration Form** by entering the requested information.

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Account Registration Form

Staff Type	Employee ID
<input type="text" value="... Select"/>	<input type="text"/>
First Name	Last Name
<input type="text"/>	<input type="text"/>
Title	Email
<input type="text"/>	<input type="text"/>
Work Location	Office Phone
<input type="text" value="... Select"/>	<input type="text"/>
Division	Office
<input type="text" value="... Select"/>	<input type="text" value="... Select"/>
Reason for Requesting Access (250 Characters Max)	
<input type="text"/>	

Submit Form

(Complete All Editable Fields Above Before Submitting Form)



Account Registration Form

**Please complete all required fields**

Staff Type	Employee ID
<input type="text" value="Contractor"/>	<input type="text"/>
First Name	Last Name
<input type="text" value="Test"/>	<input type="text" value="Account"/>
Title	Email
<input type="text"/>	<input type="text"/>
Work Location	Office Phone
<input type="text" value="... Select"/>	<input type="text"/>
Division	Office
<input type="text" value="... Select"/>	<input type="text" value="... Select"/>
Reason for Requesting Access (250 Characters Max)	
<input type="text"/>	

Submit Form

- If you select the **Submit Form** button before completing all required fields, the **Please complete all required fields** error message appears at the top of the form, and all incomplete, required fields will have a red highlight.



**Georgia DBHDD**

**Contract Management Application**

**Access Request # 15**

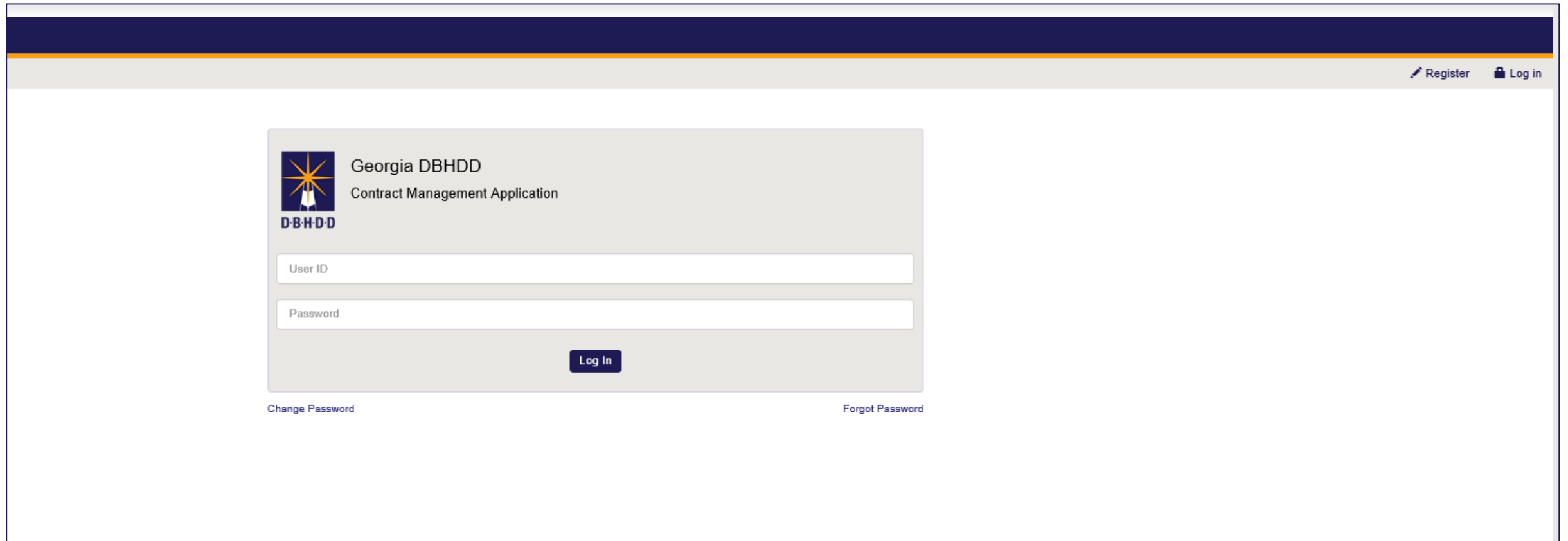
Your access request form has been submitted for approval. Please note that it may take 24 - 48 hours for your request to be processed. Should you not hear back from us within this timeframe, please email [Camille Richins](#) and reference the access request number above.



# Activating Your Account

- You will receive an email when your request is approved
- The email will prompt you to access the application and guide you through resetting your password

# Logging into CMA:



The screenshot shows the login interface for the Georgia DBHDD Contract Management Application. At the top right, there are links for [Register](#) and [Log in](#). The main login area is a light gray box containing the DBHDD logo (a starburst over a person) and the text "Georgia DBHDD Contract Management Application". Below this are two input fields: "User ID" and "Password". A dark blue "Log In" button is centered below the fields. At the bottom of the login box, there are two links: "Change Password" on the left and "Forgot Password" on the right.

# Unit 1 Wrap-Up



Questions? Feedback?

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# Unit 2: Request an AP Contract Prescreen



# CMA Application Test Environment:

<https://dbhddappsuat.dbhdd.ga.gov/CMA/Default.aspx>

*Username and Role-Based Passwords:*

**User ID:**  
[cma.testing@dbhdd.ga.gov](mailto:cma.testing@dbhdd.ga.gov)

Passwords by Role:

- **Programmatic Officer Role: ProOff123**
- Contract Manager Role: ConMan123
- Contract Specialist Role: ConSpe123
- Budget Analyst Role: BudAna123
- Budget Manager Role: BudMan123

Username and Role-Based Passwords:

User ID: [cma.testing@dbhdd.ga.gov](mailto:cma.testing@dbhdd.ga.gov)

Passwords by Role:

- Approver Role: AppRov123
- Associate Purchasing Manager Role: AssPur123
- Division Office Representative Role: DivOff123
- Division Contract Specialist Role: DivCon123



Who can  
request an AP  
contract  
prescreen?

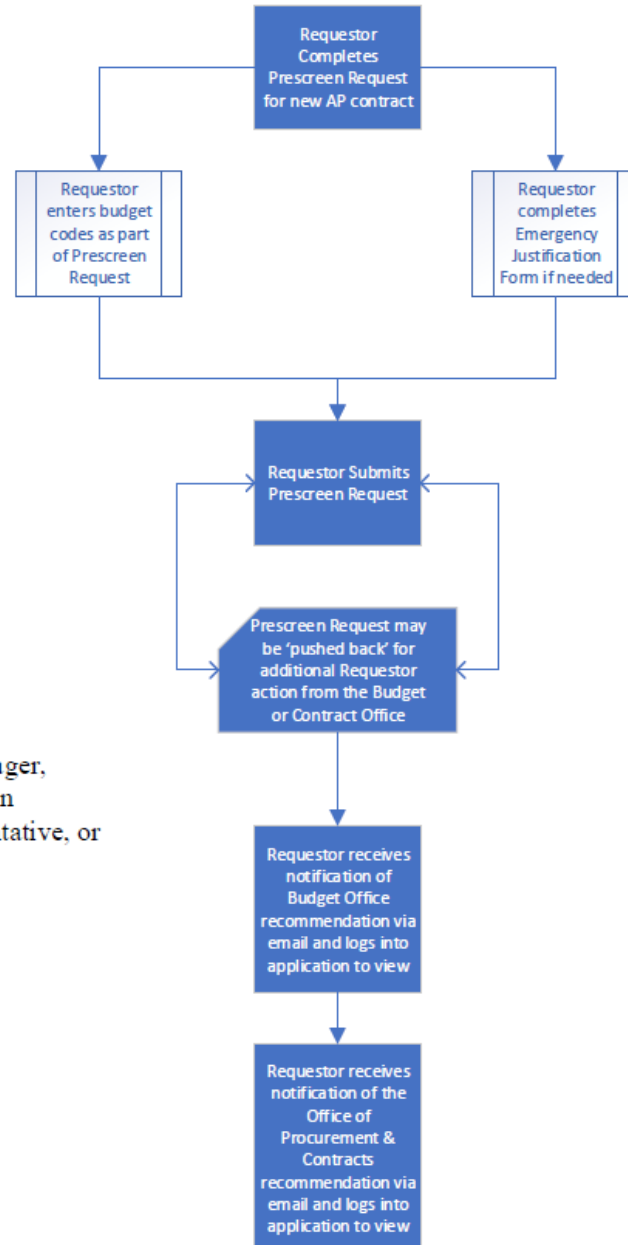
*Requestors can be any of these roles:*

- Associate Purchasing Manager
- Contract Manager
- Contract Specialist
- Division Contract Specialist
- Division / Office Representative
- Programmatic Officer




## Requesting a Prescreen Flow Chart

Requestors can be: Associate Purchasing Manager, Contract Manager, Contract Specialist, Division Contract Specialist, Division / Office Representative, or Programmatic Officer







Georgia DBHDD  
Contract Management Application

  
  
  
[Change Password](#) [Forgot Password](#)

To log in to Contract Management Application, enter your User ID and Password. Select the Log In button. If the User ID and Password are entered correctly, the Overview page will open.

## Overview

### Prescreens

If you need a new contract or need to amend or renew an existing contract, the **Prescreening** module is the place to start. Through this module, you can create a **New Prescreening** form and route it for approval, view the prescreenings you created under **My Prescreenings**, and view **All Prescreenings** in the system.

### Requests

After your prescreening form has been approved, the next step is to go to the **Requests** module and create a **New Request**. Like in the previous module, you can view the requests you created under **My Requests** and view **All Requests** in the system. If you have been asked to approve a request, you can locate the request by clicking the **To Approve** button.

- To access the Prescreens, select the Prescreens link at the top of the page, or select the Prescreens button in the middle of the page.

## Prescreens

New Prescreen

My Prescreens

My Assignments

All Prescreens

All Prescreens														
View	ID	Request Type	Contract Type	Contractor Legal Name	DBHDD Division	Service /Program	Requestor	Assigned To	Emergency Justification Form Status	Date Created	Status	Pushed Back?	Edit	Delete
Select	84						Manager, Contract	Manager, Contract	N/A	9/11/2019	Draft	No		
Select	83						Manager, Contract	Manager, Contract	N/A	9/11/2019	Draft	No		
Select	79						Manager, Contract	Manager, Contract	N/A	9/9/2019	Draft	No		
Select	78						Manager, Contract	Manager, Contract	N/A	9/8/2019	Draft	No		

Select the New Prescreen button.  
The New Prescreen page will open.

Creating a  
New  
Prescreening  
Request  
Without an  
Emergency  
Justification

New Prescreen

Contractor Information

Federal Tax ID  Legal Name  PS Vendor ID  Clear

Contractor Legal Name \*  Contractor DBA (if applicable)

Federal Tax ID \*  PS Vendor ID  ASO ID  Local Agency #  D-U-N-S #  E-Verify #

Physical Street Address (No PO Boxes) \*  City \*  State \*  Zip Code \*  County

Profit Type \*  Business Type \*  Entity Type  Vendor FY End Date (MM-DD) \*  Status

- In the Contractor Information section, you can search or enter the vendor who is requesting the contract.
- To search for the vendor, enter the Federal Tax ID, Legal Name, or PS Vendor ID in the search fields.
- The Clear button deletes the entries in the Federal Tax ID, Legal Name, and PS Vendor ID search fields.

Creating a New  
Prescreening  
Request  
Without an  
Emergency  
Justification

New Prescreen

Contractor Information

Federal Tax ID  Legal Name  PS Vendor ID  Clear

Contractor Legal Name \*  Contractor DBA (if applicable)

Federal Tax ID \*  PS Vendor ID  ASO ID  Local Agency #  D-U-N-S #  E-Verify #

Physical Street Address (No PO Boxes) \*  City \*  State \*  Zip Code \*  County

Profit Type \*  Business Type \*  Entity Type  Vendor FY End Date (MM-DD) \*  Status

- Select the Search icon. A popup page displays that says Select Vendor from List Below with the available vendor options. If the vendor information is in the system, it will display as an option.

# In the View column, select the Select link.

Select Vendor from List Below

View	FEIN	Legal Name	PeopleSoft ID	Status
Select	30-0504717	A New Day, LLC	0000449921	Active
Select	02-0772374	New Beginnings Today, LLC	0000405151	Active
Select	14-2005572	New Day Treatment Center, LLC		Active
Select	27-4446313	New Directions Community Outreach Services, Inc.		Active
Select	45-5530186	New Directions Georgia, Inc.		Active
Select	75-3103522	New Domus Personal Care, LLC		Active
Select	20-4807822	New Generation Health Services, Inc.		Active
Select	58-2587221	New Haven Personal Care Home		Active
Select	11-3737724	New Heights Behavioral Consultants, LLC	0000335237	Active
Select	26-2715763	New Heights Personal Care Homes, LLC		Active
Select	75-3248831	New Hope Counseling Services, Inc.	0000423631	Active
Select	04-3691030	New Hope Residential Facility, Inc.	0000474474	Active
Select	58-2108870	New Horizons Community Service Board	0000002782	Active
Select	90-0490031	New Pathways Youth Services, Inc		Active
Select	75-3113827	New Vision Behavioral Health Center, Inc.		Active

1 2

## New Prescreen

**Contractor Information**

Q

Q

QClear

---

Contractor Legal Name \*

Contractor DBA (if applicable)

Federal Tax ID \*

PS Vendor ID

ASO ID

Local Agency #

D-U-N-S #

E-Verify #

Physical Street Address (No PO Boxes) \*

City \*

State \*

GA▼

Zip Code \*

County

... Select▼

Profit Type \*

Non-Profit▼

Business Type \*

... Select▼

Entity Type

... Select▼

Vendor FY End Date (MM-DD) \*

Status

Active▼

- Selecting the vendor from the popup list will auto-populate all available information from the vendor in the mandatory fields. If there is missing information in a mandatory field, you will need to enter it manually.
- If the vendor is not in the system, manually complete the vendor information fields.



Business Information

Has the contractor registered with the Georgia Secretary of State's Office? \*

Yes  No  N/A

Business Information

Has the contractor registered with the Georgia Secretary of State's Office? \*

(Go to [SOS Business Search](#) page and print results page. Click below to attach results page to this form.)

Yes  No  N/A

No file selected.

Select Yes, No, or N/A to the question “Has the contractor registered with the Georgia Secretary of State’s Office?” Selecting **Yes** will direct you to the **Go to SOS Business Search** page and the print results page. Select the **Business Search** link.

The link opens the form from the **Georgia Corporations Division** to complete. Select the **Search** button for the results.

You will need to select the **Upload** button in the **Business Information** section to attach the results page to this form.

If **No** is selected, a message displays asking you to “**Please attach proof of registration from another state the contractor is registered with.**” You will need to select the **Upload** button to attach proof of registration from another state to this form.

Selecting **N/A** will require you provide a **Registration Exemption Justification**.

# Entering Contract Amounts, Grants, and Budget Codes

Contract Amounts, Grants, and Budget Codes

**Contract Amounts**

Federal \$ \*  State \$ \*  Match \$ \*  Total \$ \*

CFDA # 1 \*  CFDA # 2  CFDA # 3  CFDA # 4

**Grants** +

Grant ID	Grant Name	CFDA#	Begin Date	End Date	Funding Source	Federal \$*	Match \$*	Delete
3	Mental Health (MH) Block Grant	93.95800	10/1/2017	9/30/2019	15385	<input type="text" value="\$5000.00"/>	<input type="text" value="\$0.00"/>	
4	Mental Health (MH) Block Grant	93.95800	10/1/2018	9/30/2020	15395	<input type="text" value="\$5000.00"/>	<input type="text" value="\$0.00"/>	
						\$10,000.00	\$0.00	

**Budget Codes** +

Edit	ID	Class	Account	Fund	Program	Sub Program	Dept ID	Project	Fund Source	Amount (\$)	CFDA #'s	Delete
No Budget Codes have been added. Please click the plus icon (i.e., +) above to add a Budget Code.												

- In the **Contract Amounts** subsection, entering an amount greater than zero in the **Federal \$** field will prompt the **Grants** popup window to appear.
- Select the appropriate grant(s) by selecting the box(es) to the left of the **Grant Name**
- Enter the **CFDA** numbers in the **CFDA #** fields. **CFDA # 1** is a mandatory field; **CFDA #s 2, 3, and 4** are optional.
- To add budget codes, select the Plus sign to the right of the Budget Codes section. A popup window opens for Budget Codes and Amount Charged to Codes.

- Complete all required fields in the **Requestor Information** section.
- **NOTE:** Select the **Save** button to save the Prescreen as a **Draft**.
- In the **Prescreen Header** section, the **Prescreen Status** field shows as a **Draft**.

Prescreen Header		
Prescreen ID: 104	Prescreen Status: <b>Draft</b>	Request Type:
Requestor : Programmatic Officer	Budget Analyst/ Manager:	Contract Manager (OPC):
Entered By: Programmatic Officer	Last Updated By: Programmatic Officer	Assigned To: Programmatic Officer
Entered Date: 9-12-2019	Last Updated Date: 9-13-2019	Is Pushback? : No
Budget Recommendation:	Reason for Disapproval:	Vendor Name: New Generation Health Services, Inc.

**CMA Message**

Prescreen has been successfully Updated

Ok

Budget Codes					Amount (\$)	CFDA #s	Delete
Edit	ID	Class	Account	Fu	1000.00	-----	
Select	44	312	653600	508	1,000.00		

Requestor Information			
Requestor's Supervisor *	Programmatic Officer *	Programmatic Officer's Supervisor*	Division Director *
Approver Approver	Programmatic Officer	Approver Approver	Approver Approver

Save Submit

# DEMO

Requesting an AP Contract Prescreen

# ACTIVITY

Requesting an AP Contract Prescreen

# Activity Scenarios – Request an AP Prescreen for:

Search for Vendor  
Legal Name (hint,  
use keywords):

1. New Horizons  
Community  
Service Board

and

2. Sea Joy Family  
Service Center,  
LLC

Enter

1. Federal \$ = 250

Enter State \$ = 50

Enter Match \$ = 0

2. Federal \$ = 0

State \$ = \$150

1. Select/Add 2  
grants

Select/Add 2 lines  
of Budget Codes

2. Select Add 1  
line of Budget  
code

Recall:

- Your Total\$ Contract Amounts must match your budget codes line totals
- The federal \$ must match the total grant \$

Complete all  
required fields in  
prescreen request  
form

For the Requestor  
Information, use Ima  
Approver and  
Programmatic Officer  
all through

Save, then Submit  
the New AP  
Prescreen  
Request(s)

Review the  
Prescreen Header  
information

User ID: [cma.testing@dbhdd.ga.gov](mailto:cma.testing@dbhdd.ga.gov) Password: ProOff123

# Unit 2 Wrap-Up



- Questions? Feedback?

# Unit 3: Review & Approve an AP Contract Prescreen





# Prescreens

My Prescreens

My Assignments

All Prescreens



## All Prescreens

View	ID	Request Type	Contract Type	Contractor Legal Name	DBHDD Division	Service /Program	Requestor	Assigned To	Emergency Justification Form Status	Date Created	Status	Pushed Back?	Edit	Delete
Select	121						Officer, Programmatic	Officer, Programmatic	N/A	9/15/2019	Draft	No		
Select	120						Officer, Programmatic	Officer, Programmatic	N/A	9/15/2019	Draft	No		
Select	116		AP		Division of Accountability and Compliance		Officer, Programmatic	Officer, Programmatic	Pending Approval	9/14/2019	Draft	No		
Select	112		AP		Division of Disability Services		Specialist, Contract	Specialist, Contract	N/A	9/14/2019	Draft	No		
Select	111		AP		Division of Disability Services		Specialist, Contract	Specialist, Contract	N/A	9/14/2019	Draft	No		
Select	109		AP	New Generation Health Services, Inc.	Division of Accountability and Compliance				Pending Submission	9/14/2019	Draft	No		
Select	108		AP	New Haven Personal Care Home	Non-Divisional	Alcohol Prevention	Purchasing-Manager, Associate	Purchasing-Manager, Associate	N/A	9/13/2019	Draft	No		

## Pending Budget Action

- A budget Analyst or manager searches for requests
- After the request has been 'picked up', the status changes to 'Budget Review'

# Prescreens

My Prescreens

My Assignments

All Prescreens

## All Prescreens

View	ID	Request Type	Contract Type	Contractor Legal Name	DBHDD Division	Service /Program	Requestor	Assigned To	Emergency Justification Form Status	Date Created	Status	Pushed Back?	Edit	Delete
Select	119	New Contract	AP	New Beginnings Today, LLC	Division of Accountability and Compliance	Adolescent AD Clubhouse Services	Officer, Programmatic	Analyst, Budget	N/A	9/15/2019	Budget Review	No		
Select	106	New Contract	AP	Happy Valley Day Facility, LLC	Division of Accountability and Compliance	Adolescent AD Clubhouse Services	Adesesan, Olufunmilayo	Analyst, Budget	N/A	9/13/2019	Budget Review	No		
Select	50	New Contract	AP	Care-Free Building Maintenance, Inc.	Division of Accountability and Compliance	Accountability Courts	Adesesan, Olufunmilayo	Manager, Budget	N/A	7/8/2019	Budget Review	No		
Select	48	New Contract	AP	LoveNCare Healthcare Services, Inc.	Division of Developmental Disabilities	BH Mobile Crisis	Adesesan, Olufunmilayo	Analyst, Budget	N/A	6/25/2019	Budget Review	No		
Select	46	New Contract	AP	Happy Valley Day Facility, LLC	Division of Accountability and Compliance	ACT and CST	Adesesan, Olufunmilayo	Analyst, Budget	N/A	6/13/2019	Budget Review	No		
Select	41	New Contract	AP	Conno Healthcare Services	Non-Traditional	Allied Health Services	Hester, Tim	Manager, Budget	N/A	5/21/2019	Budget Review	No		
Select	39	New Contract	AP	Sunshine Dream	Division of Developmental Disabilities	BH Mobile Crisis	Officer, Programmatic	Analyst, Budget	N/A	5/29/2019	Budget Review	No		

Pending Budget Action to Budget Review

# View Prescreen

Edit

View Pushback History

## Prescreen Header

Prescreen ID: 119

Requestor: Procurement

Entered by: Programmatic User

Entered Date: 9-15-2019

Budget Recommendation:

Prescreen Status: Budget Review

Budget Analyst/ Manager:

Last updated by: Budget Analyst

Last Updated Date: 9-15-2019

Reason for Disapproval:

Request Type: New Contract

Contract Manager (OPC):

Assigned to: Budget Analyst

Is Pushback?: No

Vendor Name: New Beginnings Today, LLC

# Budget Review - Edit

## Contractor Information

Federal Tax ID

Legal Name

PS Vendor ID

Contractor Legal Name \*

New Beginnings Today, LLC

Contractor DBA (if applicable)

Federal Tax ID \*  
02-0772374

PS Vendor ID  
0000405151

ASO ID

Local Agency #  
607

D-U-N-S #

E-Verify #

Physical Street Address (No PO Boxes) \*  
820 Dannon View SW Ste 3202

City \*  
Atlanta

State \*  
GA

Zip Code \*  
30331

County  
... Select















# Prescreens

My Prescreens

My Assignments

All Prescreens

## All Prescreens

View	ID	Request Type	Contract Type	Contractor Legal Name	DBHDD Division	Service /Program	Requestor	Assigned To	Emergency Justification Form Status	Date Created	Status	Pushed Back?	Edit	Delete
Select	119	New Contract	AP	Happy Valley Day Facility, LLC	Division of Accountability and Compliance	Adolescent AD Clubhouse Services	Officer, Programmatic	Analyst, Budget	N/A	9/15/2019	Budget Review	No		
Select	106	New Contract	AP	Happy Valley Day Facility, LLC	Division of Accountability and Compliance	Adolescent AD Clubhouse Services	Adesesan, Olufunmilayo	Analyst, Budget	N/A	9/13/2019	Budget Review	No		
Select	50	New Contract	AP	Care-Free Building Maintenance, Inc.	Division of Accountability and Compliance	Accountability Courts	Adesesan, Olufunmilayo	Manager, Budget	N/A	7/8/2019	Budget Review	No		
Select	48	New Contract	AP	LoveNCare Healthcare Services, Inc.	Division of Developmental Disabilities	BH Mobile Crisis	Adesesan, Olufunmilayo	Analyst, Budget	N/A	6/25/2019	Budget Review	No		
Select	46	New Contract	AP	Happy Valley Day Facility, LLC	Division of Accountability and Compliance	ACT and CST Technical Assistance	Adesesan, Olufunmilayo	Analyst, Budget	N/A	6/13/2019	Budget Review	No		
Select	40	New Contract	AP	Glory Healthcare Services	Non-Divisional	AD Clubhouse Services	Bauer, Tim	Manager, Budget	N/A	5/30/2019	Budget Review	No		
Select	39	New	AP	Sunshine Dream	Division of	BH Mobile Crisis	Officer,	Analyst,	N/A	5/29/2019	Budget	No		

Budget Review – Edit option 2



Prescreen Edit  
All the fields are required

**Contract Amounts**

Federal \$ \*  State \$ \*  Match \$ \*  Total \$ \*

CFDA # 1 \*  CFDA # 2  CFDA # 3  CFDA # 4

**Grants**

Grant ID	Grant Name	CFDA#	Begin Date	End Date	Funding Source	Federal \$*	Match \$*	Delete
2	Substance Abuse, Prevention, and Treatment (SAPT) Block Grant	93.95900	10/1/2018	9/30/2020	15895	<input type="text" value="\$500.00"/>	<input type="text" value="\$0.00"/>	
3	Mental Health (MH) Block Grant	93.95800	10/1/2017	9/30/2019	15385	<input type="text" value="\$500.00"/>	<input type="text" value="\$0.00"/>	
						\$1,000.00	\$0.00	

**Budget Codes**

Edit	ID	Class	Account	Fund	Program	Sub Program	Dept ID	Project	Fund Source	Amount (\$)	CFDA #s	Delete
Select	36	312	653200	50600	6901200	6901201	4414812115	44133512121	15625	500.00	---	
Select	37	312	653600	50600	6900500	6900501	4410650201	Google Chrome	15305	500.00	---	

# Prescreen Budget Edit

Service:\*  
Alcohol Prevention

Do you want to Pushback? \*

Yes

Pushback To Status:\*

Pending Requestor Action

Pushback To User:\*

Representative, Division-Office

Action Required:\*

test

## Budget Push-Back to Requestor for Further Action

- If you need to pushback a Prescreen, select the dropdown arrow within the Do you want to Pushback? field and choose Yes. If you do not wish to pushback the Prescreen, choose No.
- The system requires you push-back if any change is made – it will default to pushback

### View Prescreen

View Pushback History

#### Prescreen Header

Prescreen ID: 110	Prescreen Status: Pending Requestor Action	Request Type: New Contract
Requestor: Programmatic Officer	Budget Analyst Manager: Budget Analyst	Contract Manager (OPC):
Entered By: Programmatic Officer	Last Updated By: Budget Analyst	Assigned To: Programmatic Officer
Entered Date: 0-15-2019	Last Update Date: 0-15-2019	Is Pushback?: Yes
Budget Recommendation:	Reason for Disapproval:	Vendor Name: New Beginnings Today, LLC

#### Prescreen Push Back Action Required

Pushback From: Budget Analyst	Pushback To: Programmatic Officer	Pushback Status: Pending Requestor Action	Pushback Date: 0/15/2019
Action Requested: test			Due Date: 0/18/2019

#### Contractor Information

# Budget Recommendation OPC

- For the Budget Recommendation OPC field, select the dropdown arrow to choose one of the following options: Approved for Amendment, Approved for New Request, Approved for Renewal, or Denied.
- Provide a relevant comment in the Comments field.

Service:\*

Alcohol Prevention

Do you want to Pushback? \*

No

Budget Recommendation OPC:\*

Approved for New Request

Comments:\*

Approved

(2000 chars remaining.)

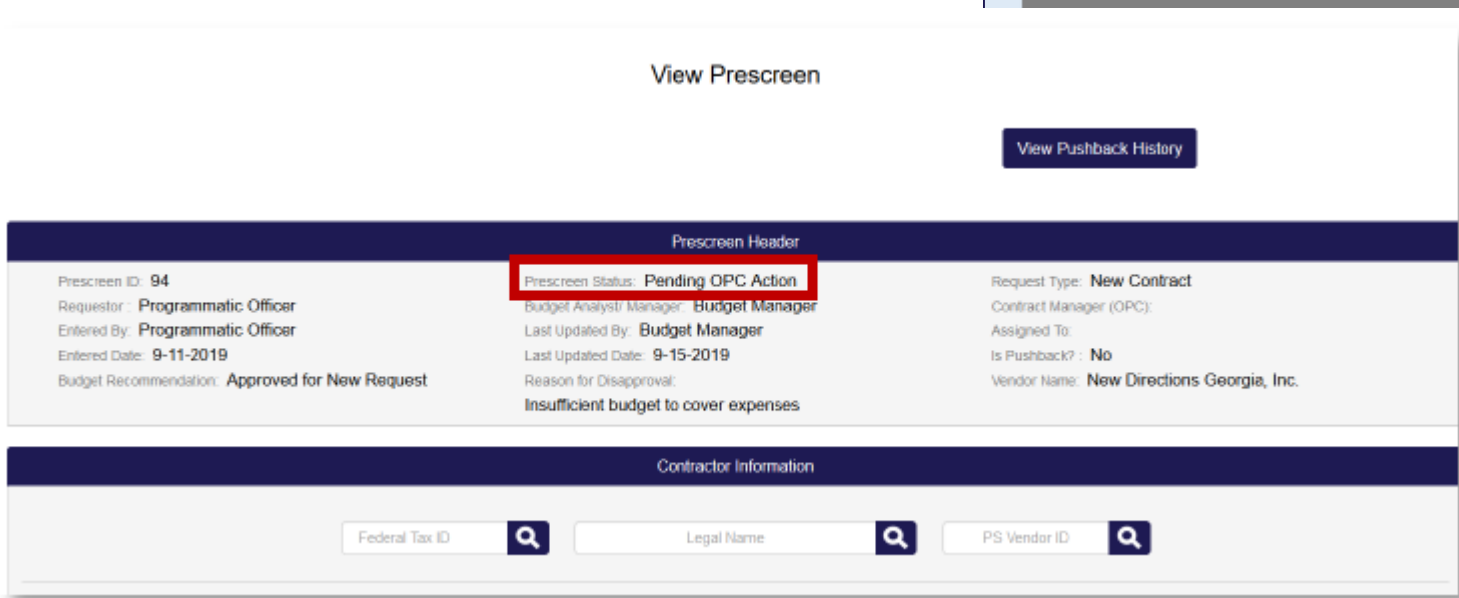
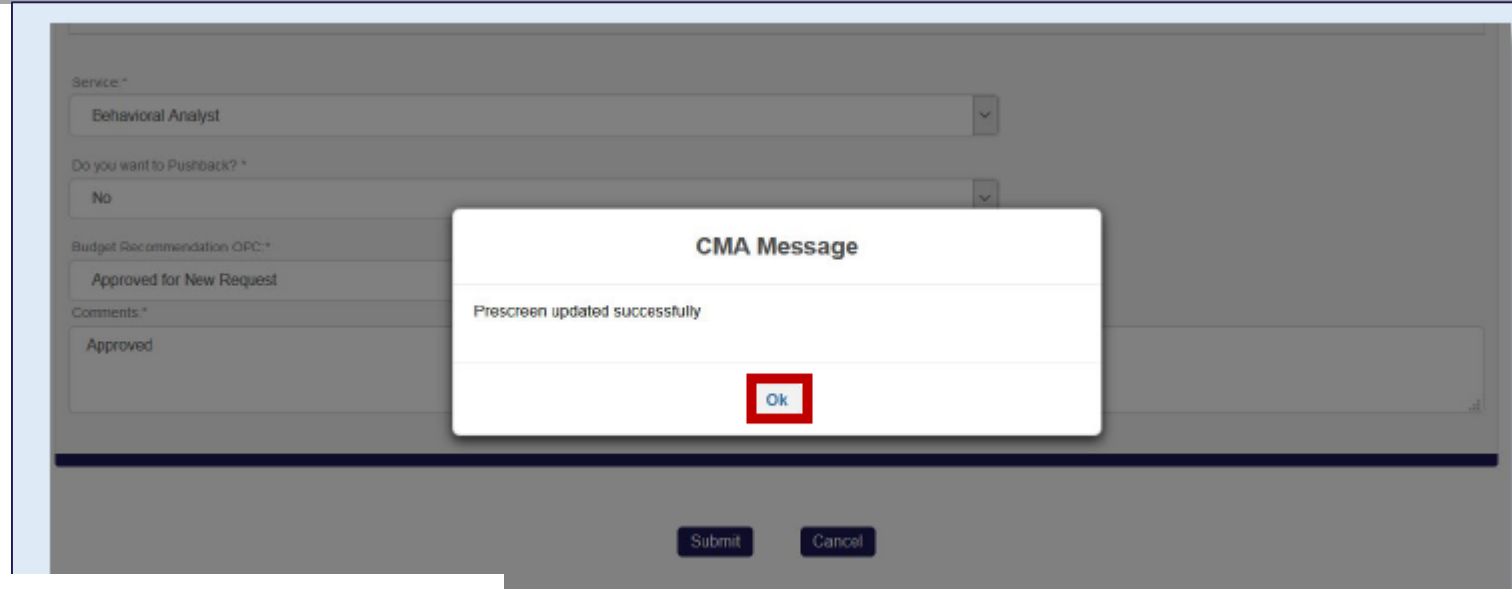


# Budget Recommendation Complete

After the review of the Prescreen has been completed, select the Submit button.

A popup screen will display a **CMA Message** that reads “**Prescreen updated successfully.**”

Select the **Ok** button.



The Prescreen Status shows the Prescreen is Pending OPC Action.

# Prescreens

My Prescreens

My Assignments

All Prescreens



## All Prescreens

# Pending OPC Action

- A contract specialist or manager searches for requests
- After the request has been 'picked up', the status changes to 'OPC Review'

View	ID	Request Type	Contract Type	Contractor Legal Name	DBHDD Division	Service /Program	Requestor	Assigned To	Emergency Justification Form Status	Date Created	Status	Pushed Back?	Edit	Delete
Select	121						Officer, Programmatic	Officer, Programmatic	N/A	9/15/2019	Draft	No		
Select	120						Officer, Programmatic	Officer, Programmatic	N/A	9/15/2019	Draft	No		
Select	116		AP		Division of Accountability and Compliance		Officer, Programmatic	Officer, Programmatic	Pending Approval	9/14/2019	Draft	No		
Select	112		AP		Division of Developmental Disabilities		Specialist, Contract	Specialist, Contract	N/A	9/14/2019	Draft	No		
Select	111		AP		Division of Developmental Disabilities		Specialist, Contract	Specialist, Contract	N/A	9/14/2019	Draft	No		
Select	109		AP	New Generation Health Services, Inc.	Division of Accountability and Compliance				Pending Submission	9/14/2019	Draft	No		
Select	108		AP	New Haven Personal Care Home	Non-Divisional	Alcohol Prevention	Purchasing-Manager, Associate	Purchasing-Manager, Associate	N/A	9/13/2019	Draft	No		

**All Prescreen Filter**

Request Type: ... Select

DBHDD Division: ... Select

IsPushBack: ... Select

Status: Pending OPC Action

Service/ Program: ... Select

**Apply**

Division of Accountability and Compliance    Officer, Programmatic    Officer, Programmatic    Pending Submission    5/14/2019

**Prescreens**

New Prescreens    My Prescreens    My Assignments    All Prescreens

View	ID	Request Type	Contract Type	Contractor Legal Name	DBHDD Division	Service/Program	Requestor	Assigned To	Emergency Substitution	Port	Date Created	Status	Pushed Back?	PDF	Delete
Select	154	New Contract	AP	New Generation Health Services, Inc.	Division of Accountability and Compliance	Administrative Service Organization	Officer, Programmatic		Pending Approval		3/12/2019	Pending OPC Action	No		
Select	52	New Contract	AP	Thomas County Board of Health	Division of Developmental Disabilities	AD Clubhouse Services	Adriecan, Oubemlayo		N/A		7/5/2018	Pending OPC Action	No		
Select	47	New Contract	AP	Charging Lines Telsa, Inc.	Division of Accountability and Compliance	Action Services	Adriecan, Oubemlayo		N/A		5/14/2019	Pending OPC Action	No		
Select	30	New Contract	AP	Sunshine Dream-Assisted Living, LLC	Division of Hospital Services	BHCC	Officer, Programmatic		N/A		5/23/2019	Pending OPC Action	No		

# Pending OPC Action to OPC Review

# OPC Approval

Prescreen Edit  
All the fields are required

Do you want to Pushback? \*

No

OPC Decision: \*

Select

Comments: \*

Submit Cancel

- If there is no reason to push back the Prescreen, select the dropdown arrow in the OPC Decision field and choose Approved, Archived, Deleted, Denied, or Suspend.
- If there is a reason to push back the Prescreen, choose Yes for the Do you want to Pushback? field. The Pushback To Status, Pushback To User, and Action Required fields will appear.

Prescreen Edit  
All the fields are required

Do you want to Pushback? \*

Yes

Pushback To Status: \*

Budget Review

Pushback To User: \*

Analyst, Budget

Action Required: \*

Submit Cancel

# DEMO

Review & Approve an AP Contract Prescreen

# ACTIVITY

Review & Approve an AP Contract Prescreen

# Unit 3 Wrap-Up



- Questions? Feedback?

# Unit 4: Request an AP Contract for an approved Prescreen





## How to create a new AP Contract Request

### Overview

**Prescreens** If you need a new contract or need to amend or renew an existing contract, the Prescreening module is the place to start. Through this module, you can create a New Prescreening form and route it for approval, view the prescreenings you created under My Prescreenings, and view All Prescreenings in the system.

**Requests** After your prescreening form has been approved, the next step is to go to the Requests module and create a New Request. Like in the previous module, you can view the requests you created under My Requests and view All Requests in the system. If you have been asked to approve a request, you can locate the request by clicking the To Approve button.

**Contracts** If your request is approved, it will be transferred to the Contracts module where the Office of Procurement and Contracts will generate the contract and route it for signatures. Contracts in the process of being development can be located by clicking the Development button. There is also page for Tracking contracts sent out for signatures and a page for locating Executed contracts.

**Vendors** The Vendors module contains a list of the vendors (contractors) the department contracted with in the past. Through this module, you can search for a vendor and view the contracts the department enter into with the vendor. Not all executed contracts have been entered into the system yet, so some vendors will show no contracts.

- From the Overview page, select the Requests button or the Requests link.

# Request New AP Contract

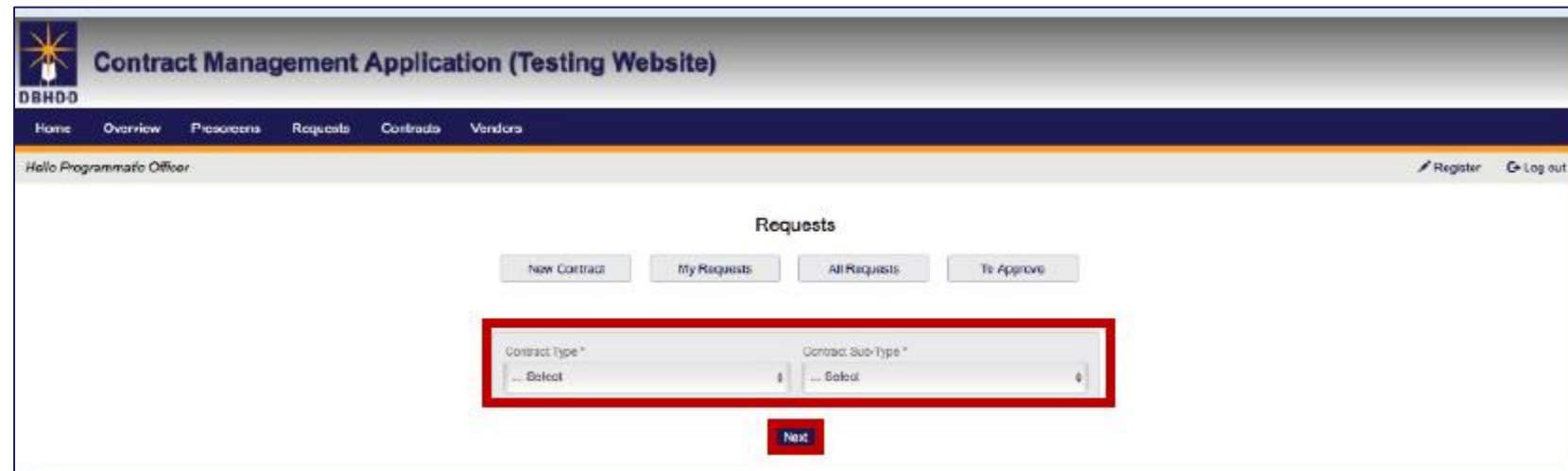


From the Requests page, select the New Contract button.

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.



# Prescreening Confirmation

- The prescreening confirmation requires a Yes or No response to determine whether a Prescreen was approved.
- Select Yes to the question “Has a prescreening request been approved for this contract?”
- Otherwise, you are directed to start with a Prescreen request

The screenshot displays the user interface of the Contract Management Application (Testing Website). The header includes the logo and the text "Contract Management Application (Testing Website)". Below the header is a navigation menu with links for "Home", "Overview", "Prescreens", "Requests", "Contracts", and "Vendors". The user's role is identified as "Programmatic Officer". In the top right corner, there are links for "Register" and "Log out". The main content area is titled "Requests" and contains four buttons: "New Contract", "My Requests", "All Requests", and "To Approve". A red rectangular box highlights a specific question: "Has a prescreening request been approved for this contract?". Below this question are two radio button options: "Yes" and "No".

## Validate Prescreening

Please review the information below for the prescreening you selected. If this is the correct prescreening, click "Submit" to continue. If not, click "Cancel".

Prescreening ID

61

Contract Type

AP

Vendor Name

A Helping Hand Personal Care Home, Inc.

OSHPD Division

Division of Accountability and Compliance

Service / Program

Accountability Courts

Created By

Chafunmilayo Adesesan

Federal \$

100.00

State \$

200.00

Match \$

0.00

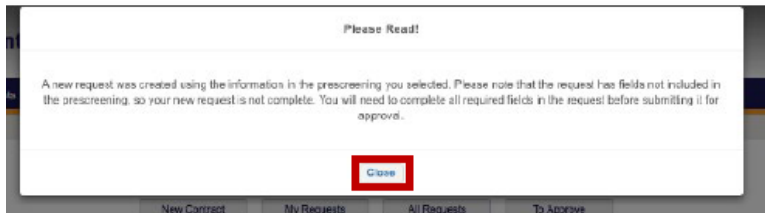
Cancel

Submit

# Select & Validate Prescreen

- To convert a Prescreen to a New Request, choose the Prescreen from the Approved Prescreening list by selecting the Select link on the far left of the Prescreen.
- 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.'"
- Select the Submit button.

# Your AP Request is Created!



- 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.”
- Select the Close button.



## Requests

New Contract My Requests All Requests To Approve

AP Contract Initiation & Summary Form			
View	Section #	Section Name	Section Status
Select	1	Contractor Information	Complete
Select	2	Business Information	Started
Select	3	Departmental Administrative Information	Started
Select	4	Contract Amounts, Grants, and Budget Codes	Started
Select	5	Department and Contractor Contact Information	----
Select	6	Contract Service Delivery Sites	----
Select	7	Purpose of Contract	----
Select	8	Contract Deliverables	----
Select	9	Federal Reporting	----
Select	10	Vendor / Subvendors Requirements	----
Select	11	Budget / Payments / Reports	----
Select	12	Contract & Summary Form	----
Select	13	Contract Summary	----
Select	14	Contract	----

# The AP Contract Initiation & Summary Form list

ID	Request type	Contract type	Sub-Type	Vendor Name	Requestor	Date Created	Status
32	New Contract	AP	Expense	A Helping Hand Personal Care Home, Inc.	Programmatic Officer	09-14-2019	Started

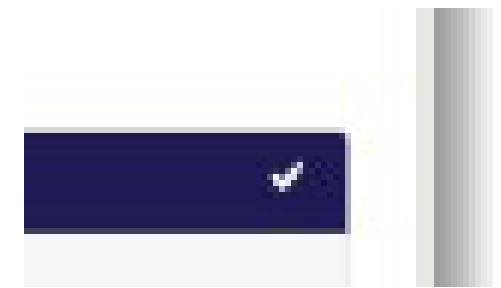
# Section Status

Select any section from the AP Contract Initiation & Summary Form or start from Section #1 to complete the request.

The Section Status will update as you progress through each section and may display as:

- 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

**Validation icon** — Identifies errors or omissions in the section





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Contract Amounts, Grants, and Budget Codes

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**Contract Amounts**

Federal \$ \* 
 State \$ \* 
 Match \$ \* 
 Total Obligation \$ \*

CFDA # 1 \* 
 CFDA # 2 
 CFDA # 3 
 CFDA # 4

**Grants**

Edit	ID	Grant Name	CFDA #	Funding Source	Federal Funds	Match Funds #	Delete
Select	94	Substance Abuse, Prevention, and Treatment (SAPT) Block Grant	93.0500	10696	50.00	0.00	
Select	95	Substance Abuse, Prevention, and Treatment (SAPT) Block Grant	93.0500	15685	50.00	0.00	
					<b>100.00</b>	<b>0.00</b>	

**Budget Codes**

Edit	ID	Class	Account	Fund	Program	Sub Program	Dept ID	Project	Fund Source	Amount(\$)	CFDA #'s	Delete
Select	12	312	653660	10100	690300	690301	4410655203	01	01	250.00	---	
Select	13	012	650260	10100	030300	030301	4410057704	14091043	21911	100.00	---	
										<b>350.00</b>		

**Budget Certification**

**Budget Representative Only**

Encumbrance Date 
 Liquidation Date

As the Department's budget representative responsible for "\_\_\_\_\_", I certify that funds are available to cover the expenditures(s) as indicated.

- The Contract Amounts, Grants, and Budget Codes section includes auto-populated information from the Prescreen.
- Complete and review the data for accuracy, and enter corrections, if applicable.
- The Budget Representative Only section requires certification.

# Completing all Sections of the Initiation Form

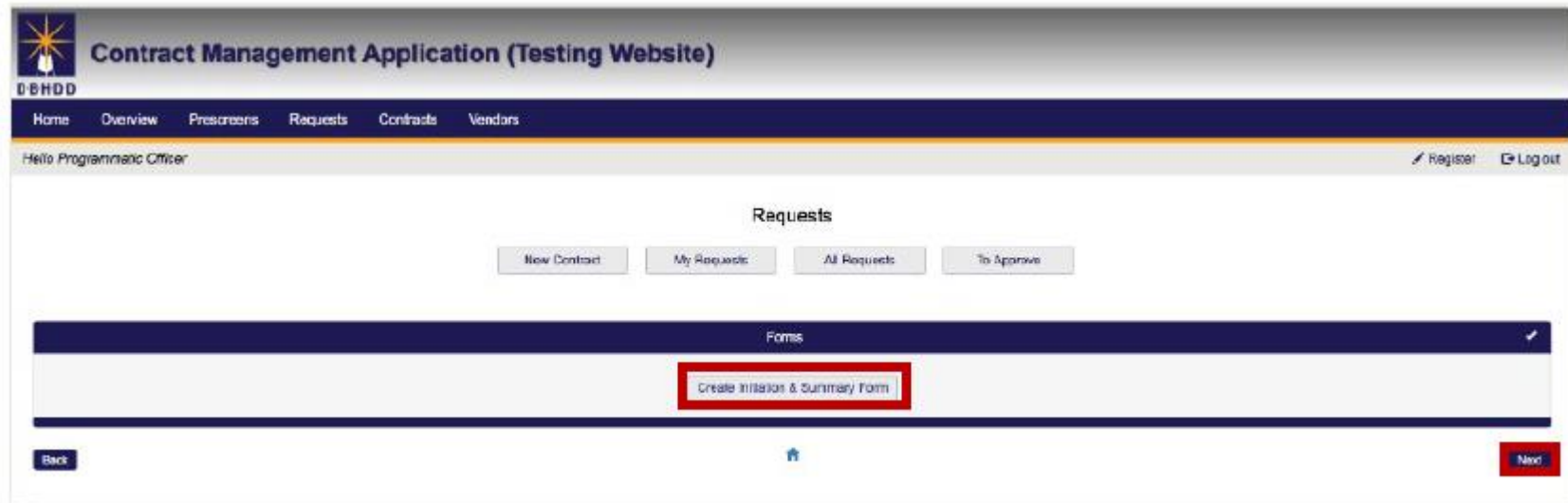


# DEMO

Request an AP Contract – Completing all  
Sections of the Initiation Form

# Create Initiation & Summary Form

- After all sections are complete
- In the **Forms** section, select the **Create Initiation & Summary Form** button to create the **AP Contract Initiation & Summary Form**.



# Initiation Form Sections must be Complete!

- If any sections are incomplete, a Warning! message appears indicating which sections must be completed.
- Select the Close button and complete the sections noted in the Warning! message.



Contract Management Application (Development Website)

Overview Prescreens Requests Contracts Vendors Admin


m Bauer Register Log out

Requests

New Contract My Requests All Requests To Approve

Forms

Create Initiation & Summary Form

Name	Created By	Create Date	Download
AP Contract Initiation & Summary Form	Tim Dauer	09-05-2019	

Next

What do you want to do with AP Contract Initiation & Summary Form\_20190905102718\_1.docx?  
From: 167.195.75.72

Open Save ^ Cancel x

- 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.
- Select the Next button.

## Download & View Initiation Form

## Management Application (Development Website)

rescreens Requests Contracts Vendors Admin

### Requests

New Contract

My Requests

All Requests

To Approve

Submit Request for Approval

### Approvals

Title	Phone #	Approval Assign Date	Approval Decision / Status	Approval Decision
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Disapproval

# Submit Request for Approval

- The Approvals section displays (prepopulates) a list of all required approvers by title and/or name.
- Select the Submit Request for Approval button.



## Submit Request for Approval

- If any sections are incomplete, a Warning! message appears indicating which sections still need to be completed.
- Select the Close button and complete the sections noted in the Warning! message.



Please Read!

Your request has been submitted. You will be notified of its status within 3 business days.

Close

## Requests

- New Contract
- My Requests
- All Requests
- To Approve

Approvals					
<b>Grant Manager</b>					
Approver Name	Title	Phone #	Approval Assign Date	Approval Decision / Status	Approval Decision / Status Date
Tim Bauer	Consultant	404-904-0578	3/18/2019 11:50:23 AM	Pending	
Action Requested / Reason for Disapproval					
<b>Budget Analyst / Manager</b>					
Approver Name	Title	Phone #	Approval Assign Date	Approval Decision / Status	Approval Decision / Status Date
Tim Bauer	Consultant	404-904-0578			
Action Requested / Reason for Disapproval					

## Submit Request for Approval

- 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.”

## Unit 5: Review & Approve an AP contract request





# Approval Workflow Begins

The screenshot displays the 'Contract Management Application (Development Website)' interface. At the top, there is a navigation menu with links for Home, Overview, Prescreens, Requests, Contracts, Vendors, and Admin. Below the menu, the user is logged in as 'Tim Bauer'. The main content area is titled 'Requests' and contains buttons for 'New Contract', 'My Requests', 'All Requests', and 'To Approve'. Below this, there is an 'Approvals' section with a table of approval records. The first record is for 'Budget Analyst | Manager' and is highlighted with a red box. The second record is for 'Office of Procurement and Contracts' and is not highlighted.

Approver Name	Title	Phone #	Approval Assign Date	Approval Decision   Status	Approval Decision   Status Date
Tim Bauer	Consultant	404-904-0678	9/5/2019 10:41:21 AM	Pending	
Tim Bauer	Consultant	404-904-0678			

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.



## Requests

- [New Contract](#)
- [My Requests](#)
- [All Requests](#)
- [To Approve](#)

### Approvals

#### Grant Manager

Approver Name	Title	Phone #	Approval Assign Date	Approval Decision \ Status	Approval Decision \ Status Date
Tim Bauer	Consultant	404-904-0678	9/16/2019 2:54:36 PM	Disapproved	9/16/2019 2:54:45 PM

Action Requested \ Reason for Disapproval

The reason for disapproval must be added to this textbox when the approver selects "Disapprove"

#### Budget Analyst \ Manager

Approver Name	Title	Phone #	Approval Assign Date	Approval Decision \ Status	Approval Decision \ Status Date
Tim Bauer	Consultant	404-904-0678			

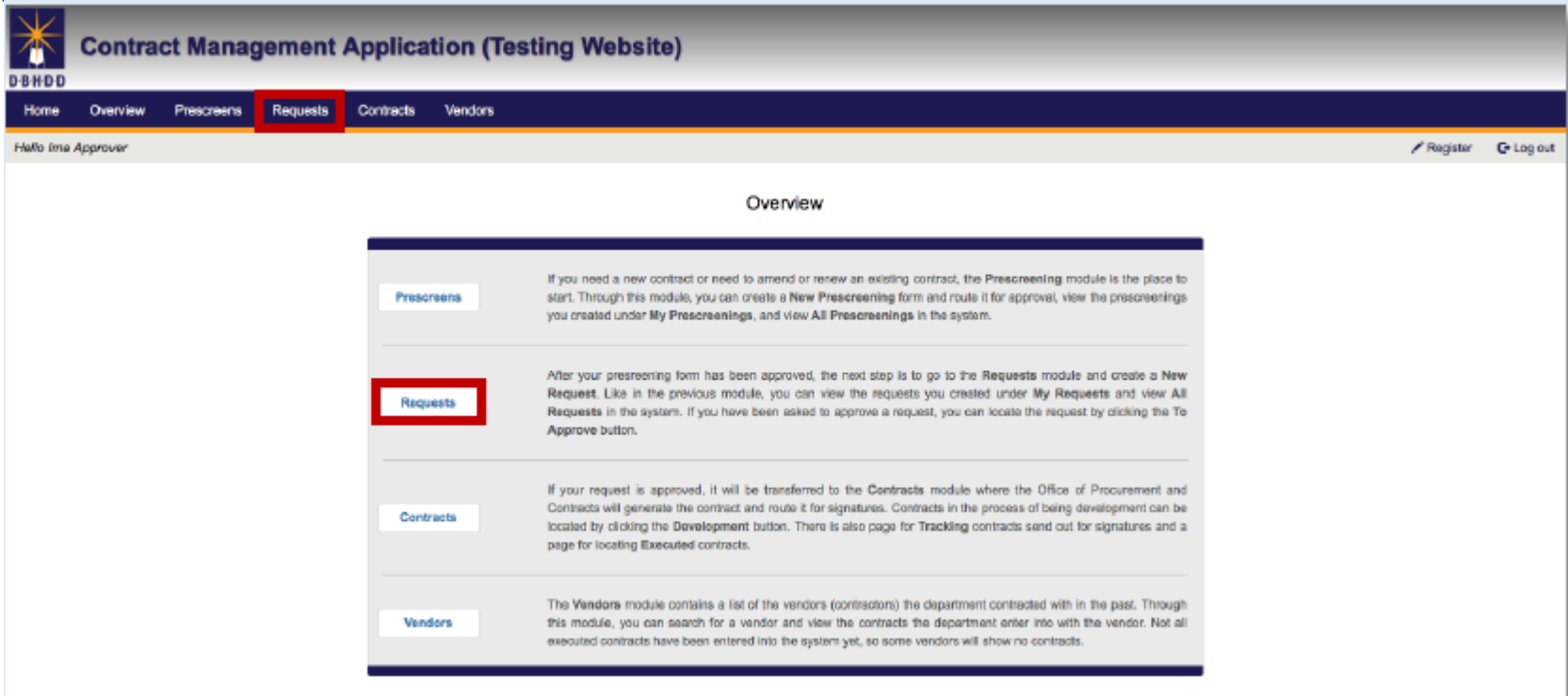
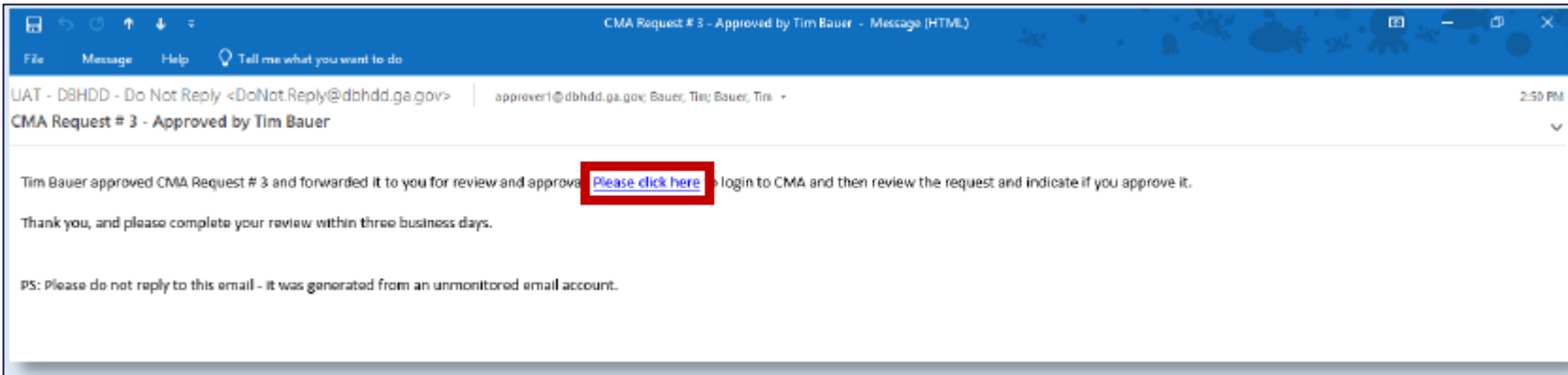
Action Requested \ Reason for Disapproval

Approval Workflow

# Approval Workflow Notes

- Each approver receives an email to respond to the request in sequence. 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.
- 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.
- If an approver selects Approved, then the requestor will receive an email stating that the request has been approved.
- Each time the request is reviewed and approved, the requestor will receive an email about the status of the request and which approver has approved it.
- 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.
- The Approvals Decision \ Status can also be viewed on the Approvals subsection.

# Making an Approval Decision



There are two ways for the approver to access the requests to approve.

- Each approver receives an email to respond to the request. The approver can select the link in the email to login and review the Request.
- From the Overview page, select the Requests button or Requests link to access the Requests.

# Making an Approval Decision

The screenshot shows the 'Contract Management Application (Testing Website)' interface. The top navigation bar includes 'Home', 'Overview', 'Prescreens', 'Requests', 'Contracts', and 'Vendors'. Below the navigation bar, there is a greeting 'Hello Programmatic Officer' and links for 'Register' and 'Log out'. The main content area is titled 'Requests' and contains four buttons: 'New Contract', 'My Requests', 'All Requests', and 'To Approve'. The 'To Approve' button is highlighted with a red rectangular border.

If selecting the Requests link from the Overview page, then select the 'To Approve' button to list the Requests to select from.

The screenshot shows the 'AP Contract Initiation & Summary Form' table. The table has four columns: 'View', 'Section #', 'Section Name', and 'Section Status'. The 'View' column contains 'Select' links for each row. The 'Approvals' row (Section # 14) has its 'Select' link highlighted with a red rectangular border.

View	Section #	Section Name	Section Status
Select	1	Contractor Information	Complete
Select	2	Business Information	Complete
Select	3	Departmental Administrative Information	Complete
Select	4	Contract Amounts, Grants, and Budget Codes	Complete
Select	5	Department and Contractor Contact Information	Complete
Select	6	Contract Service Delivery Sites	Complete
Select	7	Purpose of Contract	Complete
Select	8	Contract Deliverables	Complete
Select	9	Federal Reporting	N/A
Select	10	Vendor / Subrecipient Requirements	N/A
Select	11	Budget / Payments / Reports	Complete
Select	12	Attachments	Complete
Select	13	Initiation & Summary Form	Complete
Select	14	Approvals	Approved
Select	15	Regulation Number / Transfer Request	---

ID	Request Type	Contract Type	Sub-Type	Vendor Name	Requestor	Date Created	Status
2	New Contract	AP	Expense	New Heights Personal Care Homes, LLC	Contract Manager	09-06-2015	Approved

From the AP **Contract Initiation & Summary Form**, select the **Select** link for the **Approvals** section. The **Approvals** section displays a list of all required approvers by department and/or name.

# Indicating Your Approval Decision

The screenshot displays a web interface for a 'Contract Management' system. A modal window titled 'Budget Analyst | Manager' is open, showing a form for approval. The form includes a dropdown for 'Approver Name' (set to 'Tim Bauer'), a text area for 'Action Requested \ Reason for Disapproval', and a dropdown for 'Approval Decision \ Status'. The 'Approval Decision \ Status' dropdown is highlighted with a red box and is open, showing options: 'Select', 'Approved', 'Disapproved', and 'Action Requested'. A 'Submit' button is also highlighted with a red box. The background shows a table with columns for Approver Name, Title, Phone #, Approval Assign Date, Approval Decision \ Status, and Approval Decision \ Status Date.

Approver Name	Title	Phone #	Approval Assign Date	Approval Decision \ Status	Approval Decision \ Status Date
Tim Bauer	Consultant	404-904-0670	9/5/2019 10:41:21 AM	Pending	

The role specific popup window will appear.

In the Approval Decision/Status field, select the drop-down menu and select either: Approved, Disapproved or Action Requested.

For selections other than Approved, you must provide a comment in the Action Requested \ Reason for Disapproval field.

Select the Submit button.

NOTE: Once you submit, you will not be able to change the Approval Decision \ Status field when Pending. However, the contract manager can reset the Approval Decision \ Status if needed.

# Indicating Your Approval Decision

**Contract Management Application (Development Website)**  
DBHDD


Home Overview Prescreens Requests Contracts Vendors Admin

Hello Tim Bauer [Register](#) [Log out](#)

Requests


[New Contract](#) [My Requests](#) [All Requests](#) [To Approve](#)

**Approvals**

**Budget Analyst | Manager** 

Approver Name	Title	Phone #	Approval Assign Date	Approval Decision   Status	Approval Decision   Status Date
Tim Bauer	Consultant	404-904-0678	05/2019 10:41:21 AM	Pending	

Action Requested | Reason for Disapproval

**Office of Procurement and Contracts** 

Approver Name	Title	Phone #	Approval Assign Date	Approval Decision   Status	Approval Decision   Status Date
Tim Bauer	Consultant	404-904-0678			

Action Requested | Reason for Disapproval

Select the Edit icon to the right side of your role/title



# Approval Decision Notes

- When you select Approved and then select the Submit button, the Approval Decision \ Status field changes to Approved and the Approval Assign Date field updates.
- Upon an Approved decision of the first approver, an email will be sent instructing the next Approver to access the request for an Approved, Action Requested, or Disapproved status.
- **NOTE:** If an approver's decision is Action Requested or Disapproved, the approval workflow stops, and the requestor must take the Action Requested and the approval workflow restarts if modifications are made.
- For a Disapproved decision, only the Contract Manager may change an approval decision and/or restart the approval workflow if directed by management.



After all Approvals Received





## Requests

[My Requests](#)

[All Requests](#)

[To Approve](#)

### Requisition Number / Transfer Request

Office of Procurement and Contract Staff Only

Requisition Number \*

055596

Contract Number \*

44100-018-0000055596

Transfer Request to Development Module? \*

... Select

Reason for Not Transferring Request (if applicable)

## Requisition Number/Transfer Request

- The Requisition Number/Transfer Request section is present after all approvals are granted.
- 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.
- NOTE: If the requestor submitted the requisition, then the Requisition Number is available to him/her.

# Course Wrap-Up



- Questions? Feedback?

# CMA Training for Hospital Staff

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**BE D·B·H·D·D**

Georgia Department of Behavioral Health & Developmental Disabilities

