**Contract Management Software: Functionality**

1. For each listed functionality (herein referred to as “row”) the Respondent needs to check ONLY one of the corresponding choices on the far right: Yes, Configurable function within proposed cost, OR No.
2. A check in the “Yes” column for a row states your software can perform all of these features for that row. If your software can only perform some of the items listed but not all – circle the features it can perform and strike those that it cannot. Example: A1. “Centralized Repository for multiple agreement types: Expense, ~~Income~~, MOU, ~~Service,~~ ~~Leases~~, and Affiliations.”
3. A check in the “Configurable function within proposed cost” means your system does not automatically come with that feature but that it can be programmed for that feature. The cost for the programming must be included in your proposal.
4. A check in the “No” column means that for that row the software does not have any of those features and cannot be configured at a cost the Respondent is proposing.
5. Respondent may list on a separate page additional functionality and features not included on ATTACHMENT A1 Worksheet. PLEASE ATTACH TO THE BACK OF ATTACHMENT A1 Worksheet.

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| --- | --- | --- | --- |
| **Functionality** | Yes | Configurable function  within proposed cost | No |
| 1. **Centralization** |  |  |  |
| 1. Centralized Repository for multiple agreement types: Professional, Service Agreement, Lease, MOU, Affiliation, State Income Contract, Center Income contract and Health plans |  |  |  |
| 1. System can add a second level of categories (Ex: Individual, Group, Healthplan, …) |  |  |  |
| 1. Stores the initial contract, all support documents with that contract and all subsequent contract amendments together. |  |  |  |
| 1. System assigns a Unique Identifier to an agreement to which other aliases can be associated. Example: Dr. A works for Organization ABC. ABC is the Vendor but if I type Dr. A I will get ABC. |  |  |  |
| 1. System will capture associates who work under the vendor contract. So I can query a Vendor Contract and find all associates under that contract and I can enter the associate’s name and find the Vendor contract. |  |  |  |
| 1. Notifies designated individuals when contract is fully executed. |  |  |  |
| 1. Store Center’s Contract Monitoring Report for each active contract completed annually and report on YTD status. |  |  |  |
| 1. System can add non-Center contracts and input key info into the profile sheet. |  |  |  |
| 1. System can import existing records in to the centralized repository. |  |  |  |
| 1. Effective date of contract, imaged copy of contract, notes/comments with dates |  |  |  |
| 1. System records when background checks are completed and when next one is due. |  |  |  |
| LEAVE THIS ROW BLANK |  |  |  |
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| 1. **Visibility** |  |  |  |
| 1. Easy to Use Dashboard for agreements in the process and in centralized repository. |  |  |  |
| 1. Reports showing Contract Variance and alerts re approaching the exceeding the contract amount with unit numbers if connected to fiscal. |  |  |  |
| 1. Leases could have a table format with key elements. |  |  |  |
| 1. Consider if we could load and organize key documents for properties we own. |  |  |  |
| 1. Creates a Contractor “file” with all required information pertaining to that contact. |  |  |  |
| 1. Tracks progress of status of new contracts |  |  |  |
| 1. All contracts must be monitored annually. System can report on annual progress with details such as a list of completed reviews, in progress, and contracts yet to be started. |  |  |  |
| 1. System provides an ‘at a glance view’ of Vendor with key elements displayed. |  |  |  |
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| 1. **Automation** |  |  |  |
| 1. Software creates a work flow from contract request to termination. Workflows differ bases upon type of contract agreements. |  |  |  |
| 1. Able to manage multiple types of agreements including Professional, Service Agreement, Lease, MOU, Affiliation, State Income Contract, Center Income contract and Health plans. |  |  |  |
| 1. Ability to load various forms and templates into the system to be incorporated into the system. |  |  |  |
| 1. System has a clause library that provides suggested wording for elements in a contract. And newly developed clauses can be added to that library / element. |  |  |  |
| 1. User friendly, configurable request form for Center employees to initiate a document such as a contract or MOU. |  |  |  |
| 1. If expense contract, captures method of procurement; procurement documentation uploaded to the contract “file” in system. |  |  |  |
| 1. Tracks versions of draft agreement as language is negotiated with outside parties. |  |  |  |
| 1. Internal redline feature that allows designated reviewers to redline a document. |  |  |  |
| 1. Enhance system for contract renewal processes |  |  |  |
| 1. Integrates with AssureSign or own electronic signature system. |  |  |  |
| 1. Software has an advance notification function that can send messages and alerts to designated persons including the Vendor. |  |  |  |
| 1. System sends 60 days’ advance notification of upcoming license and certification expiration dates. |  |  |  |
| 1. Automatic Alerts for Agreements including End date, Notice date, and any renewal options. |  |  |  |
| 1. Automatic Alerts for Professional Services Contracts including License or other credentials, and Insurance |  |  |  |
| 1. Automatic Alerts for Leases including monthly rate change schedule, End date, and Notice date. |  |  |  |
| 1. Contract System Compatible with MAS 200 and Prospero |  |  |  |
| 1. Integrates with Prospero so Contract Amounts can be pulled from or matched to Center Budget |  |  |  |
| 1. Able to flag Federal Contracts over $25,000 (this will assist Business Office in calculating the indirect). |  |  |  |
| 1. Able to assigned a category for a role up such as community awareness or furniture (cumulative items over $10,000). |  |  |  |
| 1. It must have a relational database that can be queried, exported, or accessed by means of database login credentials, an ongoing data subscription connection, and/or an API connector. |  |  |  |
| 1. Has Artificial Intelligence that reviews a document and can determine if a contract has or is missing specific clauses – legal review. |  |  |  |
| 1. System has Drag and Drop features allowing easy management of stored records and can add the appropriate clause when there may be more than one choice (Ex: “one-year term” vs. “one-year term with two, one-year renewals”). |  |  |  |
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| 1. **Accessibility** |  |  |  |
| 1. Robust search functionality that allows searching Repository by date, type, amount, and vendor. |  |  |  |
| 1. Able to add Contract contact information for both internal users and the vendor. |  |  |  |
| 1. Manage the Center Contract Supervisor by assignments. Easy to check and update. |  |  |  |
| 1. Search by category in a date range: Professional, Service Agreement, Lease, MOU, Affiliation, State Income Contract, Center Income contract and Health plans. |  |  |  |
| 1. Allow Center staff to upload related documents (such as Insurance, Credentials, …) from various points of the Center |  |  |  |
| LEAVE THIS ROW BLANK |  |  |  |

Respondent may list on a separate page additional functionality and features not included on ATTACHMENT A1 Worksheet. PLEASE ATTACH TO THE BACK OF ATTACHMENT A1 Worksheet.