Overview

- This job aid is intended to provide guidance to Business Officers for performing the following tasks:
  - Approve contract requests in TCM
  - Sign contracts
1. Accessing Total Contract Manager (TCM)

1. TCM Live Environment is accessible at: baylor.edu/tcm. Use this site to explore current contacts, add new contacts, or access the contract templates available for future contracts on behalf of Baylor University.

2. A Test and Training Environment is also available at: baylor.edu/tcmtest. Please use this site if you are new to TCM and need to practice navigating the system, entering contract requests, etc.

3. Both sites can be accessed using your Bear ID and Password.

2. Contract Manager Dashboard

1. To set the Contract Manager Dashboard as your Home Page, select the Contract Manager Dashboard under the View Another Dashboard dropdown. Select the profile icon at the top right of the screen and Set My Home Page.

Verify that the Contract Manager Dashboard is selected and click Save Changes. To navigate back to the Contract Manager Dashboard at any time, select the Home icon at the top left of the screen. Most functions can be performed by beginning at the Dashboard.
3. Action Items & Notifications

If your staff members need assistance with Contract Request, please provide them a copy of the Contract Request job aid for step by step instructions.

Review and approval of a Contract Request can be completed from either Outlook or TCM.

1. From Outlook, click on the hyperlink within a Pending Contract Request email notification, OR

   - Contract Request Workflow for AAFDM - Advendia - Ad Management Platform License S
     Baylor University Contract Administration <contracts@baylor.edu> To: Brockhaus, Sarah
     Subject: RE: Contract Request Workflow for AAFDM - Advendia - Ad Management Platform License S
     Baylor University
     Student Media is Pending Approval
     Dear Sarah Brockhaus,
     AAFDM - Advendia - Ad Management Platform License S has been submitted for contract review.
     Please review the Contract Request and take action.
     Thank you,
     Baylor University

2. Sign in to TCM, then either:
   - Click on Contract Request Approvals under Action Items on your Dashboard, OR
b. Click on the **Notifications bell** at the top right of your screen, then click on the Contract Request you would like to review and approve.

![Notifications screenshot](image)

### 4. Review a Pending Contract Request

1. Review the Contract Request and the proposed Contract by clicking through the tabs on the left side of the screen. In addition, click on the **Discussion** tab on the left side of the screen to see any messages sent from the Contract Requester.

![Contract Request screenshot](image)
5. Approve or Reject a Request.

1. From the **Contract Request Actions** menu, click **Approve/Complete** if the Contract Request is complete and accurate and the contract can proceed from a budget and business case perspective.
   
a. If the request needs to be returned to the requester for corrections or supplemental information, or if the request needs to be forwarded to another approver, click **Assign to Myself**. Otherwise, click **Approve/Complete**.

   b. If you click **Assign to Myself**, and then select the Contract Request Actions menu again, you will see options to **Forward**, **Put the Request on Hold**, **Reject**, or **Return to Requester**.
      
      1. Select **Forward to…** if you need to forward the Contract Request to a different approver.
      2. Select **Put Request on Hold** if you need to revisit the Contract Request at a later date.
      3. Select **Reject** if the Contract Request will be rejected and not be allowed to move forward.
      4. Select **Return to Requester** if the Contract Request should be returned so that the Contract Requester can provide additional information and then re-submit the Contract Request.

Business Officer positions have received delegated authority to sign contracts up to a value of $100,000. Business Officers should only sign contracts which fall within their divisions or departments, and should not sign contracts over $100,000.

1. Signature requests from Baylor University will be sent from Baylor University’s DocuSign account (Baylor University via DocuSign), and should contain the contract name (using Baylor’s contract naming convention). Click Review Document to open the contract and sign.

Baylor University sent you a document to review and sign.

REVIEW DOCUMENT

Baylor University contracts_admin@baylor.edu

Dr. Brandi Anthony,

Please DocuSign AAHPR - Victory Physical Therapy - HHPR MOA.pdf

Thank You, Baylor University
2. **Agree to use Electronic Records and Signature.** Check the box to agree to use electronic records and signatures and click **Continue**.

3. **Review the Contract.** Read the Contract by scrolling through each page.

4. **Sign the Contract.** Click on the **Sign** tab, and then **Adopt and Sign** to sign the Contract.
5. Finish. Click Finish when you are done signing.
6. **Other Actions.**

If you do not wish to approve the Contract and Sign, click **Other Actions.**

Click **Decline to Sign** if you do not want to approve and sign the contract. A notification will be sent to the Contract Manager that the Contract has been declined.

Click **Assign to Someone Else** to send the contract to another signatory for signature instead, if needed.