Revising Current Contracts

A. All Contracts
B. To Add a New Region
C. To Add New Services
D. Revising a Rate on a Contract

A. All Contracts

NOTES

> ➤ When a resource needs a new service or region added to the contract, it first has to be added to the Service by Area Section under Resources.

> ➤ Relative Care providers and other placement providers only need a contract showing the **county** where the provider resides.
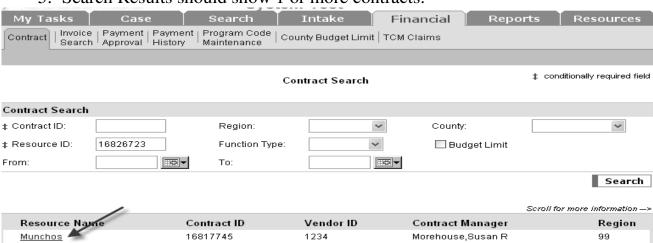
1. Financial tab → Contracts tab
2. Contract Search Page
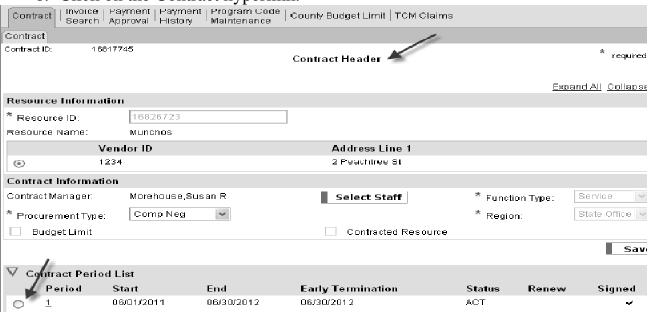

3. Enter Resource ID

4. Click Search

5. Search Results should show 1 or more contracts.

NOTE: If more than one contract listed review to ensure you are updating your Regions contract. Contracts are entered in SHINES based on paper contracts with the providers if applicable. If entering adoption assistance programs you will need to enter a separate contract id.
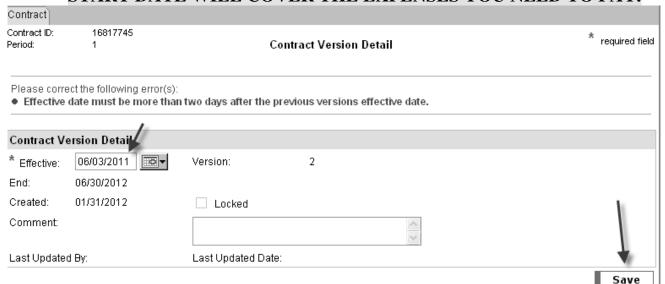
6. Click on the Contract hyperlink.

7. View Contract Header Page.
8. Click on Contract Period List section.
9. Click on last period's radio button.
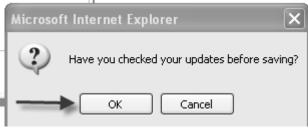10. Click Select Period button.
11. Go to Contract Version Section.

12. A new version has to be added when new services or region is added.
13. Click on ADD button → Contract Version Detail page
14. Enter a new starting date; it has to be 2 days later than the last version. If you are entering a **NEW** State program the start date can not be before the program became effective. **BE CAREFUL WHEN ENTERING THE START DATES. DO NOT ENTER FUTURE DATES. MAKE SURE THE START DATE WILL COVER THE EXPENSES YOU NEED TO PAY.**

Contract

Contract ID:	16817745
Period:	1

Contract Version Detail   * required field

Please correct the following error(s):
● Effective date must be more than two days after the previous versions effective date.

Contract Version Detail

* Effective:	06/03/2011	Version:	2
End:	06/30/2012		
Created:	01/31/2012	☐ Locked	
Comment:			
Last Updated By:		Last Updated Date:	

Save

15. Click on Save button.

Microsoft Internet Explorer   ✕

? You are creating a new contract version. Continue?

OK   Cancel

16. You will get an alert message. Click "OK"

Microsoft Internet Explorer   ✕

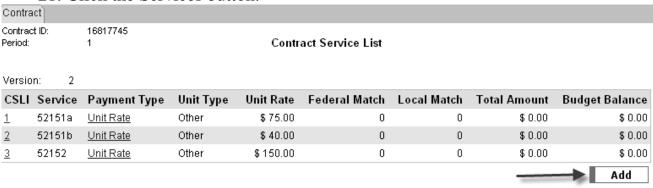? Have you checked your updates before saving?

OK   Cancel

17. You will get a second opportunity to make sure you have the correct dates. Click "OK" once you have verified your dates.
18. The screen will re-display the Contract Header Page.

19. Go to Contract Version Section.

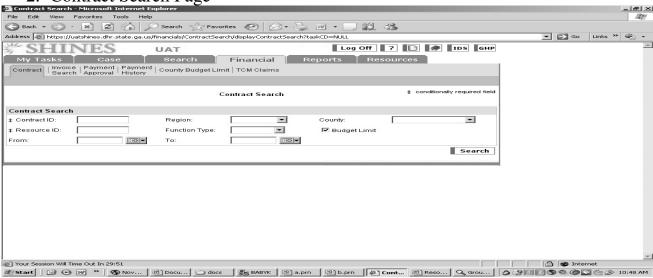20. Click the radio button next to the new version.
21. Click the Services button.

22. This will show the Contract Services list.
23. When there are new services, region or county to be added to the contract the "ADD" button will display.

B. Add a New Services
Remember to Add the New Program in the Service By Area First

1. Financial tab → Contracts tab
2. Contract Search Page

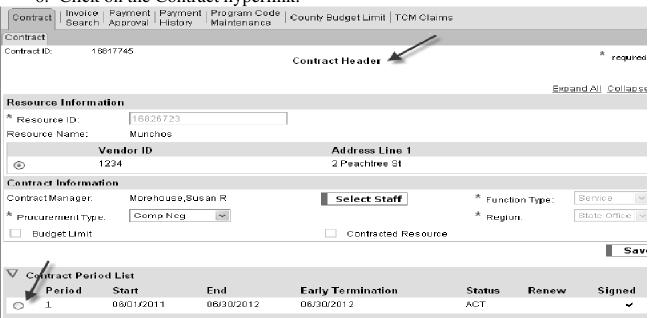3. Enter Resource ID

4. Click Search

5. Search Results should show 1 or more contracts.

NOTE: If more than one contract listed review to ensure you are updating your Regions contract. Contracts are entered in SHINES based on paper contracts with the providers if applicable. If entering adoption assistance programs you will need to enter a separate contract id.

6. Click on the Contract hyperlink.

7. View Contract Header Page.
8. Click on Contract Period List section.
9. Click on last period's radio button.
10. Click Select Period button.
11. Go to Contract Version Section.

12. A new version has to be added when new services or region is added.
13. Click on ADD button → Contract Version Detail page

14. Enter a new starting date; it has to be 3 days later than the last version. If you
    are entering a **NEW** State program the start date can not be before the program

    ecame effective.

15. **BE CAREFUL WHEN ENTERING THE START DATES. DO NOT
    ENTER FUTURE DATES. MAKE SURE THE START DATE WILL
    COVER THE EXPENSES YOU NEED TO PAY. TO CORRECT IT
    REQUIRES A DATA FIX!!!!!!!**
16. Click on Save button.

17. You will get an alert message. Click "OK"

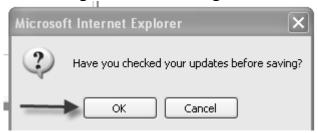18. You will get a second opportunity to make sure you have the correct dates. Click "OK" once you have verified your dates.
19. The screen will re-display the Contract Header Page
20. Go to Contract Version Section.

19. Click on the Radio Button next to the latest Contract Version.
20. Click Services → Contract Service List
21. In the Contract Services List page, click on the Add button.

			Contract Service List					

Contract ID: 16817745
Period: 1

Version: 2

CSLI	Service	Payment Type	Unit Type	Unit Rate	Federal Match	Local Match	Total Amount	Budget Balance
1	52151a	Unit Rate	Other	$ 75.00	0	0	$ 0.00	$ 0.00
2	52151b	Unit Rate	Other	$ 40.00	0	0	$ 0.00	$ 0.00
3	52152	Unit Rate	Other	$ 150.00	0	0	$ 0.00	$ 0.00
								Add

22. Select Services (Services shown are only the ones added to the Service by Area section under Resources)

23. Choose the program code you need to add from the drop down box.
24. The Contract Service Detail Page will display.

Notice that all the entitlement codes for that program are check with the Contract Services Detail Page displays.

25. Using the paper contract (if applicable) or Social Services Policy or invoices. You will need to click either "Select", "Select All", or "De-Select".
    a) Select – All entitlement Codes are listed on the Paper Contract or are needed.
    b) Select All - All entitlement Codes are listed on the Paper Contract or are needed.
    c) De-Select All – The paper contract only has certain entitlements listed. Or the contract already has some needed entitlement code. Check need entitlement codes.

26. Click "Select"

Note: Only the entitlement codes check are now displayed.
27. Select Unit Type (Placement, Day, Hourly, Session or Other)
28. Select Payment Type (Unit or Var Unit Rate)

29. Enter the Unit Rate for the particular service listed. Remember using either paper contract or policy limits if applicable. For those entitlement codes that no limits or no paper contract is required you can use $5000.00 unit rates.
30. All counties for the region are listed under the County / Code section.
31. Click "Save"
32. An alert message will appear about the counties – Click "OK"

33. A second alert message will appear giving you a second chance to review what you entered. Click "OK"

34. The Contract Service List will display after saved.

CSLI	Service	Payment Type	Unit Type	Unit Rate	Federal Match	Local Match	Total Amount	Budget Balance
1	52151a	Unit Rate	Other	$ 75.00	0	0	$ 0.00	$ 0.00
2	52151b	Unit Rate	Other	$ 40.00	0	0	$ 0.00	$ 0.00
3	52152	Unit Rate	Other	$ 150.00	0	0	$ 0.00	$ 0.00
4	52151c	Unit Rate	Other	$ 65.00	0	0	$ 0.00	$ 0.00
5	52151d	Unit Rate	Other	$ 75.00	0	0	$ 0.00	$ 0.00

Add

35. Click the small Contract tab
36. The Contract Header Page will Display

37. Scroll down to the Contract Version Section

38. Click on the Hyperlink for the latest contract version

39. Put a check mark in the box next to "Locked"
40. Enter any additional comments needed.
41. Click Save

42. An alert message will appear letting you know your about to lock the contract.

Microsoft Internet Explorer

(?) Locking contract will make the contract version unmodifiable, unless you have special security. Are you sure you are ready to lock the contract?

[OK]   [Cancel]

43. Click "OK"
44. A second alert message will appear giving another opportunity to review the dates before saving

Microsoft Internet Explorer

(?) Have you checked your updates before saving?

[OK]   [Cancel]

45. Click "OK"
46. The Contract Header Page will redisplay – Showing the latest contract version locked

▽ **Contract Period List**

	Period	Start	End	Early Termination	Status	Renew	Signed
◉	1	06/01/2011	06/30/2012	06/30/2012	ACT		✔

[Delete]   [Select Period] [Add]

▽ **Contract Version List**

	Version	Effective	End	Create	Locked	Comments
○	2	06/03/2011	06/30/2012	01/31/2012	✔	
○	1	06/01/2011	06/02/2012	01/31/2012	✔	A new period has been added.

New: The system now lets you know who updated the contract last and what date it was updated if you have any questions about what was entered and by whom.

Contract

Contract ID: 16817745
Period: 1   **Contract Version Detail**

Contract Version Detail

Effective: 06/03/2011   [▦▼]   Version: 2
End: 06/30/2012
Created: 01/31/2012   ☑ Locked
Comment:

Last Updated By: Morehouse,Susan   Last Updated Date:
R   01/31/2012

C. Revising a Rate on a Contract

1. Financial tab → Contracts tab
2. Contract Search Page

3. Enter Resource ID
4. Click Search

5. Search Results should show 1 or more contracts.

NOTE: Review both contracts to find the more complete up-to-date contract to revise. Do not enter a new contract except for adoption. Make sure you review the contract to ensure the program, county/region are not currently on an existing contract. A resource does not need a separate contract for each Region.

6. Click on the Contract hyperlink.

7. View Contract Header Page.

8. Click on Contract Period List section.
9. Click on last period's radio button.
10. Click Select Period button.

11. Go to Contract Version Section.

▽ Contract Period List						
Period	Start	End	Early Termination	Status	Renew	Signed
⊙ 1	06/01/2011	06/30/2012	06/30/2012	ACT		✔

| Delete | | Select Period | Add |

▽ Contract Version List					
Version	Effective	End	Create	Locked	Comments
○ 1	06/01/2011	06/30/2012	01/31/2012	✔	A new period has been added.

| Services | Add |

12. A new version has to be added when rates are changed.
13. Click on ADD button → Contract Version Detail page

Search Approval History Maintenance

Contract

Contract ID: 16817405   Contract Version Detail   * required field
Period: 1

Contract Version Detail

* Effective: 06/04/2011 ▦▾   Version: 2

End: 06/30/2012

Created: 03/05/2012   ☐ Locked

Comment: [   ]

Last Updated By: Last Updated Date:

| Save |

14. Enter a new starting date; it has to be 3 days later than the last version. If you
are entering a **NEW** State program the start date can not be before the program
became effective. **BE CAREFUL WHEN ENTERING THE START DATES.
DO NOT ENTER FUTURE DATES. MAKE SURE THE START DATE
WILL COVER THE EXPENSES YOU NEED TO PAY. TO CORRECT IT
REQUIRES A DATA FIX!!!!!!!**

15. Click on Save button.

16. You will get an alert message: You are creating a new contract version.
     Continue: Click "OK"

17. You will get a 2nd alert message: Have you checked your updates before
     Saving? Check your dates ONE more time. After reviewing Click "OK"
18. The screen will redisplay the Contract Header Page
19. Go to Contract Version Section.

20. Click on the Radio Button next to the latest Contract Version.

21. Click Services → Contract Service List

Contract

Contract ID: 16817405
Period: 1   Contract Service List

Version: 2

CSLI	Service	Payment Type	Unit Type	Unit Rate	Federal Match	Local Match	Total Amount	Budget Balance
1	52151a	Unit Rate	Other	$ 75.00	0	0	$ 0.00	$ 0.00
2	52151b	Unit Rate	Other	$ 40.00	0	0	$ 0.00	$ 0.00
3	52151c	Unit Rate	Other	$ 65.00	0	0	$ 0.00	$ 0.00
4	52152	Unit Rate	Other	$ 150.00	0	0	$ 0.00	$ 0.00

Add

22. Click on the number beside the program that needs the rate updated.

ontract ID: 16817405   *   required field
eriod: 1   Contract Service Detail   ‡ conditionally required field

Contract Service Detail

Version: 2   CSLI: 1

* Service: 52151a - Drug / Alcohol Screens - Hair Follicide   * Payment Type: Unit Rate

‡ Unit Type: Other   ‡ Unit Rate: $ 75.00

Federal Match: [   ]   Local Match: [   ]

	Code	County
☑	057	Cherokee
☑	067	Cobb
☑	097	Douglas

Select All   De-Select All

Save

23. Go to the Unit Rate Field and enter the new contract Unit Rate.
24. Click Save

25. The Contract Service List will Redisplay.

Contract

Contract ID: 16817405
Period: 1   Contract Service List

Version: 2

CSLI	Service	Payment Type	Unit Type	Unit Rate	Federal Match	Local Match	Total Amount	Budget Balance
1	52151a	Unit Rate	Other	$ 65.00	0	0	$ 0.00	$ 0.00
2	52151b	Unit Rate	Other	$ 40.00	0	0	$ 0.00	$ 0.00
3	52151c	Unit Rate	Other	$ 65.00	0	0	$ 0.00	$ 0.00
4	52152	Unit Rate	Other	$ 150.00	0	0	$ 0.00	$ 0.00

Add

26. Repeat Steps if other programs need rate updated.
27. Click contract on the 3rd Row Tab
28. The Contract Header Page will display.

Contract

Contract ID: 16817405
                                        Contract Header   * required fiel

Expand All Collapse All

Resource Information
* Resource ID: 16826163
Resource Name: Munchos, Inc

	Vendor ID	Address Line 1
⊙	12345	2 Peachtree St SW

Contract Information
Contract Manager: Morehouse,Susan R   Select Staff   * Function Type: Service
* Procurement Type: Comp Neg   * Region: State Office
☐ Budget Limit   ☐ Contracted Resource

Save

☑ Contract Period List

	Period	Start	End	Early Termination	Status	Renew	Signed
⊙	1	06/01/2011	06/30/2012	06/30/2012	ACT		✔

Delete   Select Period   Add

☑ Contract Version List

	Version	Effective	End	Create	Locked	Comments
○	2	06/04/2011	06/30/2012	03/05/2012		
○	1	06/01/2011	06/03/2011	03/05/2012	✔	A new period has been added.

29. To lock the newest contract version Click on the number by the latest contract
version.

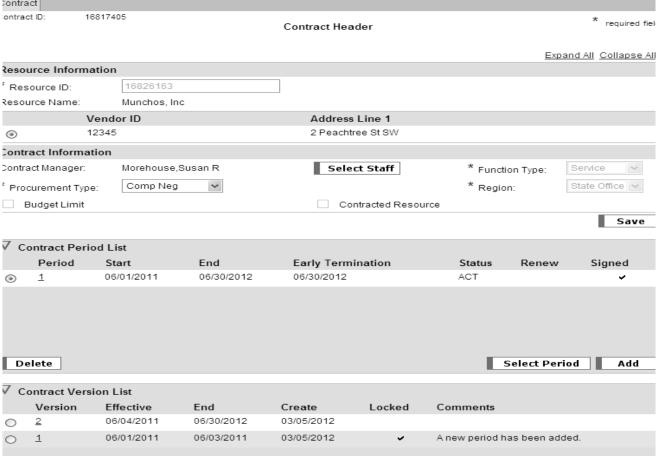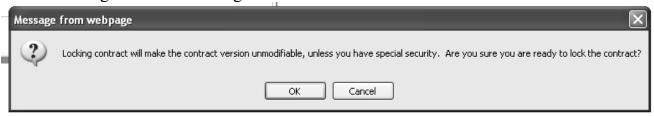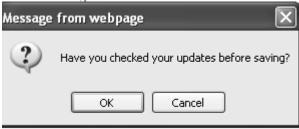30. Click on Locked Box (should have check mark).
31. Click on Save Button.
32. You will get an alert message:

33. Make sure you have entered all your changes if so Click "OK"
34. You will get a 2nd alert message:

35. Check all you updates to make sure they are right then click "OK"
36. The Contract Header Page will re-display showing your latest version is
locked.