

# Contract Management System Processes and Procedures

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## Vendor Table Management

### How do I request a vendor be added to the system?

1. Gather *at least* the required information: Vendor Name, FEIN, Address, City, State, Zip
  - a. **Bold type** denotes a required field
  - b. Include other information if available
  - c. Do NOT request Social Security Numbers be added to the system. If a vendor uses their Social Security Number as their FEIN, list “SSN” in the FEIN field.

### NEW Vendor Information

<b>Vendor Name</b>	
<b>FEIN</b>	
Vendor DBA (Doing Business As)	
<b>Address</b>	
<b>City</b>	
<b>State</b>	
<b>Zip</b>	
Vendor Contact Name	
Vendor Contact Title	
Vendor Contact Phone	
Vendor Contact Fax	
Vendor Contact Email	

2. For immediate assistance:
  - a. Call the OIT Service Desk at **303-239-4357(HELP), Option 4**
    - ▶ This number is staffed 24 hours a day, 7 days a week
  - b. An OIT staff member will verify that the vendor does not already exist within the system.
  - c. If/when verified, the new vendor will be added immediately while the requestor remains on the phone.
  - d. The requester will have to refresh the vendor drop down list within the contract record by going to the Home screen, then the Contracts Menu, and select Add a Contract.
3. These requests may also be processed by completing the Vendor Request Form (VRF) and sending via email to at: [ServiceDesk.Info-Inquiries@state.co.us](mailto:ServiceDesk.Info-Inquiries@state.co.us).
  - a. This form is also located on the Office of Contract Administration website at: <http://www.colorado.gov/dpa/dfp/sco/contracts.htm>
  - b. Requests send via email will typically be completed with a 24-hour period.

## **Instructions for completing the Vendor Request Form**

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Statewide accessibility of Colorado's Contract Management System (CMS) makes consistency of data, and good change management, of high importance. Searching for vendor information in CMS will be successful if the information input into the system is accurate. It is this need for accuracy that is one of the main reasons for creation of this Vendor Request Form (VRF) and the process it accompanies.

Requesting a vendor be added to CMS does not replace the need to have a new vendor added to COFRS. Requester's will continue to follow the process established by their own Agency/IHE for adding new vendors to COFRS, or any other financial tracking system they employ. The addition of a vendor to CMS is a separate process tied specifically to the tracking and management of a contractual agreement with the vendor, and as such, the information required does not include "remit" addresses or any other alternate mailing address and contact information.

The information required on a vendor is at the primary level. This information generally includes main office information reported on a W-9 or Secretary of State forms. It may be that an Agency/IHE does not use this primary/main address and contact information when paying a vendor or conducting day-to-day business. The Office of Contract Administration, with the advice of OIT, determined that the most consistent means of storing vendor information, so as to generate accurate reporting and search results was to limit the vendor information to that requested on the VRF and allow the agency/IHE to track any alternate addresses, phone numbers and project level contacts outside of CMS.

The VRF allows for two types of requests: 1) *Addition* of a vendor to CMS for the first time - "New Vendor" and 2) *Changing* the information on a vendor already in CMS - "Update Vendor Record."

The fields in **BOLD** must be provided on the VRF. These fields are the *minimum* information needed as part of a vendor record, although the remaining information should be available to the requester at the time they submit the VRF. As much of the information requested on the VRF that can be provided is best.

*Use a separate VRF for each request.* This will aid in the accuracy and consistency of any additions and/or changes to the vendor tables in CMS. Incomplete or inappropriately completed forms will result in delays in making the requested additions and/or changes.

Do NOT request Social Security Numbers be added to the system. If a vendor uses their Social Security Number as their FEIN, list "SSN" in the FEIN field.

## CMS Vendor Request Form

**Request Type:**

New Vendor

Update Vendor Record

<b>Requestor Full Name</b>	
<b>Agency or IHE</b>	
<b>Phone Number</b>	
<b>Email</b>	
<b>Requestor Username</b>	

### NEW Vendor Information

<b>Vendor Name</b>	
<b>FEIN</b>	
Vendor DBA ("Doing Business As")	
<b>Address</b>	
<b>City</b>	
<b>State</b>	
<b>Zip</b>	
Vendor Contact Name	
Vendor Contact Title	
Vendor Contact Phone	
Vendor Contact Fax	
Vendor Contact Email	

### UPDATE Vendor Information

	Current	Change To
<b>Vendor Name</b>		
<b>FEIN</b>		
Vendor DBA ("Doing Business As")		
<b>Address</b>		
<b>City</b>		
<b>State</b>		
<b>Zip</b>		
Vendor Contact Name		
Vendor Contact Title		
Vendor Contact Phone		
Vendor Contact Fax		
Vendor Contact Email		