Personal Services Umbrella Contract Type

FINAL FIELD LABELS	Help Screen Text
CMS Identification #	Field is automatically generated in sequential order of contract record entry. Does not number within a Department but Statewide across all departments.
Contract Title	Enter a short name for the project defined in the contract. Ex: Financial Advisory Services.
Contract Purpose	Enter a short description of the work the vendor is being hired to perform.
Fiscal Year	This is an OPTIONAL Field. Type in 4 digit year reflective of the fiscal year contract performance will begin.
Contractor/Vendor	Select the Name of the Vendor. If the vendor needed is not listed, complete a New Vendor Request form and submit to the OIT Service Desk. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
FEIN	Field will display only last 4 digits of FEIN for security purposes. Field will populate once record is saved. Verify that the FEIN belongs to the vendor selected.
Contract Administrator	Will default to person entering the contract record. Change this if another employee will be responsible for updates to the contract record. Change the contract administrator last since once changed only that person can make further edits.
Unique Department Contract Number	This field is OPTIONAL. Use if the Department has a unique numbering convention.
Original Contract CLIN or other Identifying Number	This is an OPTIONAL Field. If your contract preceded July 1, 2009 and has some type of identifying contract routing number associated with it (e.g. CLIN number or Department Contract Number), enter that number in this field. If entering a Modification, enter the CMS number of the contract being modified.
Purchase Order or Encumbrance Number	This is an OPTIONAL Field. Enter the alpha-numeric PO# or other Encumbrance number. Ex: SC EGB C0800022-10
Agency/IHE (Department) Name	Field will default to the department of the person entering the contract record.
Agency/IHE (Department) Code	Select the matching department code of the person entering the contract record. Will match the 3 character COFRS Agency Code.
Document Status	Select where in the contract creation process the agreement is currently. For example, has the contract been fully signed? If so then select "Approved." Is the contract still being written? Then select Draft.
Effective Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the date that document is fully executed. Since this field must be populated for record creation, if contract is not yet fully executed, enter an estimated date. This field can be modified once final signature obtained but then does NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Expiration Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the expiration date of that document NOT including possible renewals/extensions. Ex: for a 1-year contract effective June 1, 2009, the End Date will be May 31, 2010. This field will NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Performance Period Start Date	REMEMBER - Dates entered must relate to the specific record you are working in. In most cases, this entry will equal the Effective Date field for the first term of the contract when original performance begins. This date reflects when the contract performance begins. This date does NOT change if/when a mod to extend the End Date (or renew the contract period) is executed.
LATEST Performance Period End Date	REMEMBER - The dates entered must relate to the specific record you are working in. In most cases, this entry will be the same as the Expiration Date field for the first term of the contract when original performance begins. This date WILL CHANGE when new contract term begins. Ex: Effective Date of Original Contract was 05/10/2010 and Expiration Date of the Original Contract was 04/30/2011, and renewing for another 1 year term, then this LATEST date will change from 04/30/2011 to 04/30/2012. This is the date on which the Notify Days field bases the alerts.
Number of renewal periods	This is a reportable field. Select how many additional years the contract can be renewed if needed and able. Ex: If have a 1-year contract with Option to renew for 4 additional 1-year periods, select 4-years. If the contract is for 1-year with a holdover provision, then < 1-year would be selected.
Contract Group/Type	Entry will default initially to the selected Umbrella Contract Type. If a more specific subcategory applies, the next field should be changed to be reflective of the specific type of contract being executed.
Contract Sub-Type	Change this field if a more specific sub-category applies to the contract being executed. Ex: If selected Personal Services as the Umbrella Contract Type and will be entering into a Grant Agreement, change this field to "Grants" to more specifically identify the type of Personal Services contract. If the subcategory selected is "Master Task Order" make sure to read the Help text for both "Maximum Contract Amount of the Original contract," "CUMULATIVE Maximum Contract Dollar Amount," and guidance/help text provided on Task Orders in general.
Is this an IT contract?	All IT contracts must be identified for OIT search and oversight.
Maximum Amount	REMEMBER - The dollar amounts entered must relate to the specific record you are working in. Ex: If entering a Master Task Order Agreement then enter the MAXIMUM dollar amount payable under this contract at time of signing - generally this is the "Not to Exceed" amount. This field will not change unless the record is for a Master Task Order. Only for a Master Task Order record would this field potentially change if funds are added to increase the "cap" amount that ALL Task Orders combined cannot exceed.
CUMULATIVE Maximum Contract Dollar Amount (For Master Task Orders read Help text for instruction)	When adding money to the original contract, this field is modified. Dollars entered will reflect the original contract amount PLUS any/all modifications adding money. Ex: Maximum Contract Amount of the Original contract = $100,000 then amend the contract to add an additional $100,000, enter $200,000 in this field. This field is also used for Master Task Order contracts to track the CUMULATIVE amount of ALL Individual Task Orders issued against the cap amount. Each time an Individual Task Order record is created that spends against the Maximum, this CUMULATIVE must change. This is why ONLY for Master Task Order records the Maximum Amount field could potentially change if funds are added to increase the overall "cap".
Solicitation Method Used	Select from drop down choices. Authorized by Statute can be used for either a Vendor specified in the law or a Law Specified Selection Method. If solicitation method used is not included in the list, select "OTHER" and complete the next field. If "OTHER" is selected, the next field MUST be completed. This is a reportable field - do not leave it blank.
If selected OTHER, enter the Method used	This field MUST be completed if "OTHER" is selected in the "Solicitation Method Used" field. "OTHER" could include: BVB - Best Value Bidding, RA - Reverse Auctions, CN - Competitive Negotiations, PAQR - Price Agreement Quote Requests , PPI = Public-Private Initiative, Court Ordered.
Solicitation Number	Enter identifying number on solicitation. Ex: DAA-RFP-JC10-001 or HAA DQ 10-150 SW or KAA-20100650-P
If this is a Sole Source, was a “Sole Source Justification and Certification” form completed, and placed in contract file, that includes the mandatory determination steps?	Completion of the "State of Colorado Sole Source Justification" form is required to proceed with a Sole Source solicitation. This is a reportable field. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms." The completed form should be scanned and attached to the contract record.
Sole Source Justification	Select one of the 5 options in the drop down list. If "OTHER" is selected, complete the next field. Start the "No" response with "Sole Source Justification: ___"
If selected OTHER, enter the justification for the Source.	This field MUST be completed if "OTHER" is selected in the "Sole source Justification" field. Entry should reflect what is on the actual Sole source Justification and Certification form. Start the "No" response with "Sole Source Justification: ___"
Select ALL steps taken in making the Sole Source determination	Statute requires identification of all steps taken towards making the determination that the vendor is the only available source. At least one of the 3 options must have been taken and selected. See Section 1.5 of the Sole Source Justification form. To select more than one from this list, hold the Ctrl key while clicking on each selection.
Is this a Statutory Violation?	Select "Yes" if Vendor/Contractor began work, or the State made payments, prior to the Effective date of the Original (first contract term) contract.
Is this a High Risk or Low Risk Contract?	This is an OPTIONAL field. Refer to OSC Policy "Automatic High and Low Risk Contracts" for assistance in making this determination. Policies available on OSC website.
Are Services ANTICIPATED to occur outside of Colorado?	This information should be part of the vendor's solicitation response AND specified in the contract Statement of Work (SOW).
Are Services ANTICIPATED to occur outside of the United States?	This information should be part of the vendor's solicitation response AND specified in the contract Statement of Work (SOW).
Is the Contractor/Vendor performing work previously performed by State Employee(s)?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (1)
How many positions (FTE) is the Contractor/Vendor filling that were previously performed by State Employees?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (2)
For work previously performed by State Employees, how long did the Contractor perform the work? (# of months)	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (3)
How many positions were ELIMINATED by the Contractor/Vendor performing this Work?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (4)
Number of State Jobs Created	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (5)

This Umbrella includes the following sub-contract types:
> Personal Services
> Grants
> Intellectual Property
>Master Task Order
>Ourtsource Agreements
>Purchase Orders (>$100,000)
> Price Agreements
>Professional Services

Duration of State Jobs Created	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (6)	
What Quality Improvements did the State gain by having Contractor/Vendor do the Work previously performed by State Employees?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (7)	
What Dollar ($) Savings did the State gain by having Contractor/Vendor do the Work previously performed by State Employees?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (8)	
Percentage of work ACTUALLY performed outside of Colorado.	This may or may not be the same as what was anticipated in the vendor's solicitation response. For Master Task Order contracts, the vendor must provide a total percentage representing work performed under ALL individual task orders issued under the Master Contract. This field is populated at the completion of the Master Contract term.	
Percentage of work ACTUALLY performed outside of the United States.	This may or may not be the same as what was anticipated in the vendor's solicitation response. For Master Task Order contracts, the vendor must provide a total percentage representing work performed under ALL individual task orders issued under the Master Contract. This field is populated at the completion of the Master Contract term.	
Program Manager	Select the name of the person within the department that will lead the project described in the contract. This is the individual who will have direct access to the vendor's work and/or work product and be able to evaluate and rate the vendor's performance.	
Has this contract been Certified as including: Performance Measures and Standards, Methods for Resolution, and Types of Monitoring Processes?	Statute requires an affirmative determination that the contract includes Performance Measures and Standards AND Methods for Resolution of Noncompliance AND Types of Monitoring Processes before contract is finalized. Selecting "Yes" in this field certifies (affirms) the contract does contain all of these provisions. OSC has made a Certification form available for use in support of this electronic certification ("Performance Measures and Standards Certification - Original Contract"). If used, the form should be made part of the contract file, scanned and attached to the contract record. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."	
If this contract has been renewed/extended, has the contractor's previous work been certified (affirmed) as complying with the terms of the contract?	Statute requires "recertification" every 12-months that the vendor has performed per the contract. This may or may not align with renewal of the contract. OSC has made an "Annual Certification" form available for use in support of this electronic certification ("CMS Annual Certification"). If used, the form should be made part of the contract file, scanned and attached to the contract record. Ex: A contract with an initial term of 3 years (5/1/2010 through 4/30/2013) with options to renew for 2 additional 1-year periods will have to certify on 4/1/2011 before work can continue, on 4/30/2012 before work can continue and on 4/30/2013 if the contract is extended. For contracts entered into with an initial term of 1-year, the certification process should occur prior to extension for each additional term. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."	
If applicable, enter date of MOST RECENT annual certification of contractor's work.	At the end of each contract period, certification of the vendor's compliance with the terms of the contract, must occur. This date will change if/when the vendor's work is certified over the lifetime of the contract. If extending a contract, the field in the Modification record must also be completed.	
Final Contractor/Vendor Rating (no renewal periods remain)	REMEMBER - Keep in mind the record you are entering/updating. If you are entering data into a Master or Original/Underlying Contract then this field is for use in reporting the FINAL rating assigned a vendor after all renewals/extensions of the contract. Individual Task Order evaluations/ratings will "add up" for use in assigning a FINAL rating at the end of the entire Master Contract term. If the vendor was evaluated quarterly, yearly etc., those interim ratings can be recorded in the NOTES fields and the FINAL rating added to this field at the END of the full contract. If you are entering data into an Individual Task Order record then this field is OPTIONAL and not published onto the public website but rather becomes part of the information used at the end of the entire Master Contract term. The FINAL ratings entered into a Master or Original/Underlying Contract record, should be reflective of performance over the life of the contract using the following ratings: 1=Below Standard: Contractor's performance under the contract has failed to meet all specifications/requirements of the contract. Support documentation is required for this rating and should be scanned and attached to the contract record. 2=Standard: Contractor's performance under the contract has met all specifications/requirements of the contract. 3=Above Standard: Contractor's performance under the contract has exceeded specifications/requirements of the contract. Support documentation is required for this rating and should be scanned and attached to the contract record. The final rating could be a compilation of interim ratings throughout the term of the contract. Ex: If over a five year contract the vendor was rated as: Year-1 = Standard (2), Year-2 = Standard (2), Year-3 = Above Standard (3), Year-4 = Above Standard, Year-5 = Standard (2) then the Final Rating would be: (2+2+3+3+2)/5 or 2.4 = Standard. Supporting documentation to this should appear in the contract file. This is a Reportable Field.	
When was the Rating sent to the Contractor/Vendor?	REMEMBER - Keep in mind the record you are entering/updating. Vendor must be notified immediately upon FINAL Rating as this is the value that will be shown on the public website, and the vendor needs to be given time to submit comment before the public posting. Posting will occur within 30-days of contract completion. Interim ratings that are recorded in Notes Fields will not go public. Only what is placed in the "Final Contractor/Vendor Rating" field in the Master or Original/Underlying Contract record will post publically. If the vendor is being sent a rating for the Individual Task Order, it should be sent in a timely manner in order to record performance prior to issuance of subsequent task orders and/or to make an annual performance certification determination. Information entered into an Individual Task Order record will not post onto the public website.	
Did the Contractor/Vendor submit responses to its Evaluation?	REMEMBER - Keep in mind the record you are entering/updating. If you are entering data into a Master or Original/Underlying Contract record and if the Contractor submitted responses to its FINAL rating and evaluation, a copy should be attached to the contract record and copied into the Vendor Comments Field for transfer to the public website. Any interim ratings and evaluations shared with the vendor to which the vendor also responded can also be attached but are not recorded in this field. If you are entering data into an Individual Task Order record, and the vendor is sent a rating for the Individual Task Order, it should be sent in a timely manner in order to record performance prior to issuance of subsequent task orders and/or to make a recertification determination. Information entered into an Individual Task Order record will not post onto the public website.	
Did the Contractor/Vendor submit Comments as to the State's performance under the Contract?	If the Vendor commented on how the State's employees performed during the term of the contract, a copy should be included in the contract record - in the paper file and/or attached in CMS.	
Contractor/Vendor Comments/Responses	REMEMBER - Keep in mind the record you are entering/updating. If you are entering data into a Master or Original/Underlying Contract record and if the Contractor submitted responses to its FINAL rating and evaluation, such comments must be entered here. If the vendor submitted comments electronically, simply cut and paste. If the vendor submitted hardcopy, enter EXACTLY what was written by the vendor. This field will show on the public website - check spelling and wording for accuracy. If you are entering data into an Individual Task Order record these will not post onto the public website.	
Did the Contractor/Vendor DISPUTE the Evaluation?	Disputing an evaluation is different from submitting comments. Disputes are a formal process requiring the vendor to complete the form entitled "Contractor's Statement of Rebuttal to Performance Evaluation." If "Yes" selected, a copy should be included in the contract record - in the paper file and attached to the CMS record, AND a note must be made in the Contractor/Vendor Comments field stating: "On MM/DD/YYYY the Vendor submitted a rebuttal statement." The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."	
Budget Amount	The Budget field is an OPTIONAL field that must be populated by the Contract Administrator if the CMS Financials functionality is being used to track invoices or individual task order spend against the Maximum or "Not to exceed" amount of the contract. The Budget field will equal the "CUMULATIVE Maximum Contract Dollar Amount" field. In the case of Master Task Order Contracts, the Budget field will equal the "Maximum Amount" field.	
Notes	This Notes field should be kept as brief as possible. The field is free form.	
Custom Field 1	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.	
Custom Field 2	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.	
Custom Field 3	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.	
Entered By	Field will auto populate with name of person creating the initial contract record. Cannot be changed.	
Entered on Date	Field will auto populate with the date the contract record was originally created. Cannot be changed.	
Updated By	This field will auto populate each time a contract record is modified. Cannot be changed.	
Updated on Date	This field will auto populate each time a contract record is modified. Cannot be changed.	

Individual Task Order Umbrella Contract Type

No sub-contract Types

FINAL FIELD LABELS	Help Screen Text
CMS Identification #	Field is automatically generated in sequential order of contract record entry. Does not number within a Department but Statewide across all departments.
Contract Title	Enter a short name for the Task that also references the Master Task Order Agreement. Ex: T.O. #1 for Drilling Services on Highway 285 under Master Contract #1234.
Contract Purpose	Enter a short description of the work the vendor is being hired to perform.
Fiscal Year	This is an OPTIONAL Field. Type in 4 digit year reflective of the fiscal year contract performance will begin.
Contractor/Vendor	Select the Name of the Vendor. If the vendor needed is not listed, complete a New Vendor Request form and submit to the OIT Service Desk. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
FEIN	Field will display only last 4 digits of FEIN for security purposes. Field will populate once record is saved. Verify that the FEIN belongs to the vendor selected.
Contract Administrator	Will default to person entering the contract record. Change this if another employee will be responsible for updates to the contract record. Change the contract administrator last since once changed only that person can make further edits.
Unique Department Contract Number	This field is OPTIONAL. Use if the Department has a unique numbering convention.
Purchase Order or Encumbrance Number	This is an OPTIONAL Field. Enter the alpha-numeric PO# or other Encumbrance number. Ex: SC EGB C0800022-10
Agency/IHE (Department) Name	Field will default to the department of the person entering the contract record.
Agency/IHE (Department) Code	Select the matching department code of the person entering the contract record. Will match the 3 character COFRS Agency Code.
Effective Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the date that document is fully executed. Since this field must be populated for record creation, if contract is not yet fully executed, enter an estimated date. This field can be modified once final signature obtained but then does NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Expiration Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the expiration date of that document NOT including possible renewals/extensions. Ex: for a 1-year contract effective June 1, 2009, the End Date will be May 31, 2010. This field will NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Performance Period Start Date	REMEMBER - Dates entered must relate to the specific record you are working in. In most cases, this entry will equal the Effective Date field for the first term of the contract when original performance begins. This date reflects when the contract performance begins. This date does NOT change if/when a mod to extend the End Date (or renew the contract period) is executed.
LATEST Performance Period End Date	REMEMBER - The dates entered must relate to the specific record you are working in. In most cases, this entry will be the same as the Expiration Date field for the first term of the contract when original performance begins. This date WILL CHANGE when new contract term begins. Ex: Effective Date of Original Contract was 05/10/2010 and Expiration Date of the Original Contract was 04/30/2011, and renewing for another 1 year term, then this LATEST date will change from 04/30/2011 to 04/30/2012. This is the date on which the Notify Days field bases the alerts.
Contract Group/Type	Entry will default initially to the selected Umbrella Contract Type. If a more specific subcategory applies, the next field should be changed to be reflective of the specific type of contract being executed.
Is this an IT contract?	All IT contracts must be identified for OIT search and oversight.
Maximum Amount	REMEMBER - The dollar amounts entered must relate to the specific record you are working in. Ex: If entering a Master Task Order Agreement then enter the MAXIMUM dollar amount payable under this contract at time of signing - generally this is the "Not to Exceed" amount. This field will not change unless the record is for a Master Task Order. Only for a Master Task Order record would this field potentially change if funds are added to increase the "cap" amount that ALL Task Orders combined cannot exceed.
Is this a Statutory Violation?	Select "Yes" if Vendor/Contractor began work, or the State made payments, prior to the Effective date of the Original (first contract term) contract.
Is this a High Risk or Low Risk Contract?	This is an OPTIONAL field. Refer to OSC Policy "Automatic High and Low Risk Contracts" for assistance in making this determination. Policies available on OSC website.
Program Manager (20)	Select the name of the person within the department that will lead the project described in the contract. This is the individual who will have direct access to the vendor's work and/or work product and be able to evaluate and rate the vendor's performance.
What Monitoring Processes were used to monitor Contractor Performance?	This is an OPTIONAL field. Examples: Site Visits, Monthly Reports, Customer Surveys, etc. Master Agreement had to have been Certified as containing Performance Measures and Standards and types of Monitoring Process. Enter which were used for this Individual Task Order.

Final Contractor/Vendor Rating (no renewal periods remain)	REMEMBER - Keep in mind the record you are entering/updating. If you are entering data into a Master or Original/Underlying Contract then this field is for use in reporting the FINAL rating assigned a vendor after all renewals/extensions of the contract. Individual Task Order evaluations/ratings will "add up" for use in assigning a FINAL rating at the end of the entire Master Contract term. If the vendor was evaluated quarterly, yearly etc., those interim ratings can be recorded in the NOTES fields and the FINAL rating added to this field at the END of the full contract. If you are entering data into an Individual Task Order record then this field is OPTIONAL and not published onto the public website but rather becomes part of the information used at the end of the entire Master Contract term. The FINAL ratings entered into a Master or Original/Underlying Contract record, should be reflective of performance over the life of the contract using the following ratings: 1=Below Standard: Contractor’s performance under the contract has failed to meet all specifications/requirements of the contract. Support documentation is required for this rating and should be scanned and attached to the contract record. 2=Standard: Contractor‘s performance under the contract has met all specifications/requirements of the contract. 3=Above Standard: Contractor’s performance under the contract has exceeded specifications/requirements of the contract. Support documentation is required for this rating and should be scanned and attached to the contract record. The final rating could be a compilation of interim ratings throughout the term of the contract. Ex: If over a five year contract the vendor was rated as: Year-1 = Standard (2), Year-2 = Standard (2), Year-3 = Above Standard (3), Year-4 = Above Standard, Year-5 = Standard (2) then the Final Rating would be: (2+2+3+3+2)/5 or 2.4 = Standard. Supporting documentation to this should appear in the contract file. This is a Reportable Field.
When was the Rating sent to the Contractor/Vendor?	REMEMBER - Keep in mind the record you are entering/updating. Vendor must be notified immediately upon FINAL Rating as this is the value that will be shown on the public website, and the vendor needs to be given time to submit comment before the public posting. Posting will occur within 30-days of contract completion. Interim ratings that are recorded in Notes Fields will not go public. Only what is placed in the "Final Contractor/Vendor Rating" field in the Master or Original/Underlying Contract record will post publically. If the vendor is being sent a rating for the Individual Task Order, it should be sent in a timely manner in order to record performance prior to issuance of subsequent task orders and/or to make an annual performance certification determination. Information entered into an Individual Task Order record will not post onto the public website.
Did the Contractor/Vendor submit responses to its Evaluation?	REMEMBER - Keep in mind the record you are entering/updating. If you are entering data into a Master or Original/Underlying Contract record and if the Contractor submitted responses to its FINAL rating and evaluation, a copy should be attached to the contract record and copied into the Vendor Comments Field for transfer to the public website. Any interim ratings and evaluations shared with the vendor to which the vendor also responded can also be attached but are not recorded in this field. If you are entering data into an Individual Task Order record, and the vendor is sent a rating for the Individual Task Order, it should be sent in a timely manner in order to record performance prior to issuance of subsequent task orders and/or to make a recertification determination. Information entered into an Individual Task Order record will not post onto the public website.
Contractor/Vendor Comments/Responses	REMEMBER - Keep in mind the record you are entering/updating. If you are entering data into a Master or Original/Underlying Contract record and if the Contractor submitted responses to its FINAL rating and evaluation, such comments must be entered here. If the vendor submitted comments electronically, simply cut and paste. If the vendor submitted hardcopy, enter EXACTLY what was written by the vendor. This field will show on the public website - check spelling and wording for accuracy. If you are entering data into an Individual Task Order record these will not post onto the public website.
Budget Amount	The Budget field is an OPTIONAL field that must be populated by the Contract Administrator if the CMS Financials functionality is being used to track invoices or individual task order spend against the Maximum or “Not to exceed” amount of the contract. The Budget field will equal the "CUMULATIVE Maximum Contract Dollar Amount" field. In the case of Master Task Order Contracts, the Budget field will equal the "Maximum Amount" field.
Notes	This Notes field should be kept as brief as possible. The field is free form.
Custom Field 1	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 2	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Entered By	Field will auto populate with name of person creating the initial contract record. Cannot be changed.
Entered on Date	Field will auto populate with the date the contract record was originally created. Cannot be changed.
Updated B	This field will auto populate each time a contract record is modified. Cannot be changed.
Updated on Date	This field will auto populate each time a contract record is modified. Cannot be changed.

Intergovernmental Umbrella Contract Type

No sub-contract Types

FINAL FIELD LABELS	Help Screen Text
CMS Identification #	Field is automatically generated in sequential order of contract record entry. Does not number within a Department but Statewide across all departments.
Contract Title	Enter a short name for the project defined in the contract. Ex: Financial Advisory Services.
Contract Purpose	Enter a short description of the work the vendor is being hired to perform.
Fiscal Year	This is an OPTIONAL Field. Type in 4 digit year reflective of the fiscal year contract performance will begin.
Contractor/Vendor	Select the Name of the Vendor. If the vendor needed is not listed, complete a New Vendor Request form and submit to the OIT Service Desk. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
FEIN	Field will display only last 4 digits of FEIN for security purposes. Field will populate once record is saved. Verify that the FEIN belongs to the vendor selected.
Contract Administrator	Will default to person entering the contract record. Change this if another employee will be responsible for updates to the contract record. Change the contract administrator last since once changed only that person can make further edits.
Unique Department Contract Number	This field is OPTIONAL. Use if the Department has a unique numbering convention.
Original Contract CLIN or other Identifying Number	This is an OPTIONAL Field. If your contract preceded July 1, 2009 and has some type of identifying contract routing number associated with it (e.g. CLIN number or Department Contract Number), enter that number in this field. If entering a Modification, enter the CMS number of the contract being modified.
Purchase Order or Encumbrance Number	This is an OPTIONAL Field. Enter the alpha-numeric PO# or other Encumbrance number. Ex: SC EGB C0800022-10
Agency/IHE (Department) Name	Field will default to the department of the person entering the contract record.
Agency/IHE (Department) Code	Select the matching department code of the person entering the contract record. Will match the 3 character COFRS Agency Code.
Effective Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the date that document is fully executed. Since this field must be populated for record creation, if contract is not yet fully executed, enter an estimated date. This field can be modified once final signature obtained but then does NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Expiration Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the expiration date of that document NOT including possible renewals/extensions. Ex: for a 1-year contract effective June 1, 2009, the End Date will be May 31, 2010. This field will NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Performance Period Start Date	REMEMBER - Dates entered must relate to the specific record you are working in. In most cases, this entry will equal the Effective Date field for the first term of the contract when original performance begins. This date reflects when the contract performance begins. This date does NOT change if/when a mod to extend the End Date (or renew the contract period) is executed.
LATEST Performance Period End Date	REMEMBER - The dates entered must relate to the specific record you are working in. In most cases, this entry will be the same as the Expiration Date field for the first term of the contract when original performance begins. This date WILL CHANGE when new contract term begins. Ex: Effective Date of Original Contract was 05/10/2010 and Expiration Date of the Original Contract was 04/30/2011, and renewing for another 1 year term, then this LATEST date will change from 04/30/2011 to 04/30/2012. This is the date on which the Notify Days field bases the alerts.
Number of renewal periods	This is a reportable field. Select how many additional years the contract can be renewed if needed and able. Ex: If have a 1-year contract with Option to renew for 4 additional 1-year periods, select 4-years. If the contract is for 1-year with a holdover provision, then < 1-year would be selected.
Contract Group/Type	Entry will default initially to the selected Umbrella Contract Type. If a more specific subcategory applies, the next field should be changed to be reflective of the specific type of contract being executed.
Is this an IT contract?	All IT contracts must be identified for OIT search and oversight.
Maximum Amount	REMEMBER - The dollar amounts entered must relate to the specific record you are working in. Ex: If entering a Master Task Order Agreement then enter the MAXIMUM dollar amount payable under this contract at time of signing - generally this is the "Not to Exceed" amount. This field will not change unless the record is for a Master Task Order. Only for a Master Task Order record would this field potentially change if funds are added to increase the "cap" amount that all Task Orders combined cannot exceed.
CUMULATIVE Maximum Contract Dollar Amount (For Master Task Orders read Help text for instruction)	When adding money to the original contract, this field is modified. Dollars entered will reflect the original contract amount PLUS any/all modifications adding money. Ex: Maximum Contract Amount of the Original contract = $100,000 then amend the contract to add an additional $100,000, enter $200,000 in this field. This field is also used for Master Task Order contracts to track the CUMULATIVE amount of all Individual Task Orders issued against the cap amount. Each time an Individual Task Order record is created that spends against the Maximum, this CUMULATIVE must change. This is why ONLY for Master Task Order records the Maximum Amount field could potentially change if funds are added to increase the overall "cap".
Is this a Statutory Violation?	Select "Yes" if Vendor/Contractor began work, or the State made payments, prior to the Effective date of the Original (first contract term) contract.
Is this a High Risk or Low Risk Contract?	This is an OPTIONAL field. Refer to OSC Policy "Automatic High and Low Risk Contracts" for assistance in making this determination. Policies available on OSC website.
Are Services ANTICIPATED to occur outside of Colorado?	This information should be part of the vendor's solicitation response AND specified in the contract Statement of Work (SOW).
Are Services ANTICIPATED to occur outside of the United States?	This information should be part of the vendor's solicitation response AND specified in the contract Statement of Work (SOW).
Is the Contractor/Vendor performing work previously performed by State Employee(s)?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (1)
How many positions (FTE) is the Contractor/Vendor filling that were previously performed by State Employees?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (2)
For work previously performed by State Employees, how long did the Contractor perform the work? (# of months)	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (3)
How many positions were ELIMINATED by the Contractor/Vendor performing this Work?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (4)
Number of State Jobs Created	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (5)
Duration of State Jobs Created	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (6)
What Quality Improvements did the State gain by having Contractor/Vendor do the Work previously performed by State Employees?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (7)
What Dollar ($) Savings did the State gain by having Contractor/Vendor do the Work previously performed by State Employees?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (8)
Percentage of work ACTUALLY performed outside of Colorado.	This may or may not be the same as what was anticipated in the vendor's solicitation response. For Master Task Order contracts, the vendor must provide a total percentage representing work performed under ALL individual task orders issued under the Master Contract. This field is populated at the completion of the Master Contract term.
Percentage of work ACTUALLY performed outside of the United States.	This may or may not be the same as what was anticipated in the vendor's solicitation response. For Master Task Order contracts, the vendor must provide a total percentage representing work performed under ALL individual task orders issued under the Master Contract. This field is populated at the completion of the Master Contract term.
Program Manager	Select the name of the person within the department that will lead the project described in the contract. This is the individual who will have direct access to the vendor's work and/or work product and be able to evaluate and rate the vendor's performance.

Has this contract been Certified as including: Performance Measures and Standards, Methods for Resolution, and Types of Monitoring Processes?	Statute requires an affirmative determination that the contract includes Performance Measures and Standards AND Methods for Resolution of Noncompliance AND Types of Monitoring Processes before contract is finalized. Selecting "Yes" in this field certifies (affirms) the contract does contain all of these provisions. OSC has made a Certification form available for use in support of this electronic certification ("Performance Measures and Standards Certification - Original Contract"). If used, the form should be made part of the contract file, scanned and attached to the contract record. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
If this contract has been renewed/extended, has the contractor's previous work been certified (affirmed) as complying with the terms of the contract?	Statute requires "recertification" every 12-months that the vendor has performed per the contract. This may or may not align with renewal of the contract. OSC has made an "Annual Certification" form available for use in support of this electronic certification ("CMS Annual Certification"). If used, the form should be made part of the contract file, scanned and attached to the contract record. Ex: A contract with an initial term of 3 years (5/1/2010 through 4/30/2013) with options to renew for 2 additional 1-year periods will have to certify on 4/1/2011 before work can continue, on 4/30/2012 before work can continue and on 4/30/2013 if the contract is extended. For contracts entered into with an initial term of 1-year, the certification process should occur prior to extension for each additional term. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
If applicable, enter date of MOST RECENT annual certification of contractor's work.	At the end of each contract period, certification of the vendor's compliance with the terms of the contract, must occur. This date will change if/when the vendor's work is certified over the lifetime of the contract. If extending a contract, the field in the Modification record must also be completed.
Final Contractor/Vendor Rating (no renewal periods remain)	REMEMBER - Keep in mind the record you are entering/updating. If you are entering data into a Master or Original/Underlying Contract then this field is for use in reporting the FINAL rating assigned a vendor after all renewals/extensions of the contract. Individual Task Order evaluations/ratings will "add up" for use in assigning a FINAL rating at the end of the entire Master Contract term. If the vendor was evaluated quarterly, yearly etc., those interim ratings can be recorded in the NOTES fields and the FINAL rating added to this field at the END of the full contract. If you are entering data into an Individual Task Order record then this field is OPTIONAL and not published onto the public website but rather becomes part of the information used at the end of the entire Master Contract term. The FINAL ratings entered into a Master or Original/Underlying Contract record, should be reflective of performance over the life of the contract using the following ratings: 1=Below Standard: Contractor's performance under the contract has failed to meet all specifications/requirements of the contract. Support documentation is required for this rating and should be scanned and attached to the contract record. 2=Standard: Contractor's performance under the contract has met all specifications/requirements of the contract. 3=Above Standard: Contractor's performance under the contract has exceeded specifications/requirements of the contract. Support documentation is required for this rating and should be scanned and attached to the contract record. The final rating could be a compilation of interim ratings throughout the term of the contract. Ex: If over a five year contract the vendor was rated as: Year-1 = Standard (2), Year-2 = Standard (2), Year-3 = Above Standard (3), Year-4 = Above Standard, Year-5 = Standard (2) then the Final Rating would be: (2+2+3+3+2)/5 or 2.4 = Standard. Supporting documentation to this should appear in the contract file. This is a Reportable Field.
When was the Rating sent to the Contractor/Vendor?	REMEMBER - Keep in mind the record you are entering/updating. Vendor must be notified immediately upon FINAL Rating as this is the value that will be shown on the public website, and the vendor needs to be given time to submit comment before the public posting. Posting will occur within 30-days of contract completion. Interim ratings that are recorded in Notes Fields will not go public. Only what is placed in the "Final Contractor/Vendor Rating" field in the Master or Original/Underlying Contract record will post publically. If the vendor is being sent a rating for the Individual Task Order, it should be sent in a timely manner in order to record performance prior to issuance of subsequent task orders and/or to make an annual performance certification determination. Information entered into an Individual Task Order record will not post onto the public website.
Did the Contractor/Vendor submit responses to its Evaluation?	REMEMBER - Keep in mind the record you are entering/updating. If you are entering data into a Master or Original/Underlying Contract record and if the Contractor submitted responses to its FINAL rating and evaluation, a copy should be attached to the contract record and copied into the Vendor Comments Field for transfer to the public website. Any interim ratings and evaluations shared with the vendor to which the vendor also responded can also be attached but are not recorded in this field. If you are entering data into an Individual Task Order record, and the vendor is sent a rating for the Individual Task Order, it should be sent in a timely manner in order to record performance prior to issuance of subsequent task orders and/or to make a recertification determination. Information entered into an Individual Task Order record will not post onto the public website.
Did the Contractor/Vendor submit Comments as to the State's performance under the Contract?	If the Vendor commented on how the State's employees performed during the term of the contract, a copy should be included in the contract record - either in the paper file or attached in CMS.
Contractor/Vendor Comments/Responses	REMEMBER - Keep in mind the record you are entering/updating. If you are entering data into a Master or Original/Underlying Contract record and if the Contractor submitted responses to its FINAL rating and evaluation, such comments must be entered here. If the vendor submitted comments electronically, simply cut and paste. If the vendor submitted hardcopy, enter EXACTLY what was written by the vendor. This field will show on the public website - check spelling and wording for accuracy. If you are entering data into an Individual Task Order record these will not post onto the public website.
Did the Contractor/Vendor DISPUTE the Evaluation?	Disputing an evaluation is different from submitting comments. Disputes are a formal process requiring the vendor to complete the form entitled "Contractor's Statement of Rebuttal to Performance Evaluation." If yes selected, a copy should be included in the contract record - in the paper file and/or attached to the CMS record, AND a note must be made in the Contractor/Vendor Comments field stating: "On MM/DD/YYYY the Vendor submitted a rebuttal statement." The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
Budget Amount	The Budget field is an OPTIONAL field that must be populated by the Contract Administrator if the CMS Financials functionality is being used to track invoices or individual task order spend against the Maximum or "Not to exceed" amount of the contract. The Budget field will equal the "CUMULATIVE Maximum Contract Dollar Amount" field. In the case of Master Task Order Contracts, the Budget field will equal the "Maximum Amount" field.
Notes	This Notes field should be kept as brief as possible. The field is free form.
Custom Field 1	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 2	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 3	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Entered By	Field will auto populate with name of person creating the initial contract record. Cannot be changed.
Entered on Date	Field will auto populate with the date the contract record was originally created. Cannot be changed.
Updated By	This field will auto populate each time a contract record is modified. Cannot be changed.
Updated on Date	This field will auto populate each time a contract record is modified. Cannot be changed.

Interagency Umbrella Contract Type

No sub-contract Types

FINAL FIELD LABELS	Help Screen Text
CMS Identification #	Field is automatically generated in sequential order of contract record entry. Does not number within a Department but Statewide across all departments.
Contract Title	Enter a short name for the project defined in the contract. Ex: Financial Advisory Services.
Contract Purpose	Enter a short description of the work the vendor is being hired to perform.
Fiscal Year	This is an OPTIONAL Field. Type in 4 digit year reflective of the fiscal year contract performance will begin.
Contractor/Vendor	Select the Name of the Vendor. If the vendor needed is not listed, complete a New Vendor Request form and submit to the OIT Service Desk. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
FEIN	Field will display only last 4 digits of FEIN for security purposes. Field will populate once record is saved. Verify that the FEIN belongs to the vendor selected.
Contract Administrator	Will default to person entering the contract record. Change this if another employee will be responsible for updates to the contract record. Change the contract administrator last since once changed only that person can make further edits.
Unique Department Contract Number	This field is OPTIONAL. Use if the Department has a unique numbering convention.
Original Contract CLIN or other Identifying Number	This is an OPTIONAL Field. If your contract preceded July 1, 2009 and has some type of identifying contract routing number associated with it (e.g. CLIN number or Department Contract Number), enter that number in this field. If entering a Modification, enter the CMS number of the contract being modified.
Purchase Order or Encumbrance Number	This is an OPTIONAL Field. Enter the alpha-numeric PO# or other Encumbrance number. Ex: SC EGB C0800022-10
Agency/IHE (Department) Name	Field will default to the department of the person entering the contract record.
Agency/IHE (Department) Code	Select the matching department code of the person entering the contract record. Will match the 3 character COFRS Agency Code.
Effective Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the date that document is fully executed. Since this field must be populated for record creation, if contract is not yet fully executed, enter an estimated date. This field can be modified once final signature obtained but then does NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Expiration Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the expiration date of that document NOT including possible renewals/extensions. Ex: for a 1-year contract effective June 1, 2009, the End Date will be May 31, 2010. This field will NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Performance Period Start Date	REMEMBER - Dates entered must relate to the specific record you are working in. In most cases, this entry will equal the Effective Date field for the first term of the contract when original performance begins. This date reflects when the contract performance begins. This date does NOT change if/when a mod to extend the End Date (or renew the contract period) is executed.
LATEST Performance Period End Date	REMEMBER - The dates entered must relate to the specific record you are working in. In most cases, this entry will be the same as the Expiration Date field for the first term of the contract when original performance begins. This date WILL CHANGE when new contract term begins. Ex: Effective Date of Original Contract was 05/10/2010 and Expiration Date of the Original Contract was 04/30/2011, and renewing for another 1 year term, then this LATEST date will change from 04/30/2011 to 04/30/2012. This is the date on which the Notify Days field bases the alerts.
Number of renewal periods	This is a reportable field. Select how many additional years the contract can be renewed if needed and able. Ex: If have a 1-year contract with Option to renew for 4 additional 1-year periods, select 4-years. If the contract is for 1-year with a holdover provision, then < 1-year would be selected.
Contract Group/Type	Entry will default initially to the selected Umbrella Contract Type. If a more specific subcategory applies, the next field should be changed to be reflective of the specific type of contract being executed.
Maximum Amount	REMEMBER - The dollar amounts entered must relate to the specific record you are working in. Ex: If entering a Master Task Order Agreement then enter the MAXIMUM dollar amount payable under this contract at time of signing - generally this is the "Not to Exceed" amount. This field will not change unless the record is for a Master Task Order. Only for a Master Task Order record would this field potentially change if funds are added to increase the "cap" amount that all Task Orders combined cannot exceed.
CUMULATIVE Maximum Contract Dollar Amount (For Master Task Orders read Help text for instruction)	When adding money to the original contract, this field is modified. Dollars entered will reflect the original contract amount PLUS any/all modifications adding money. Ex: Maximum Contract Amount of the Original contract = $100,000 then amend the contract to add an additional $100,000, enter $200,000 in this field. This field is also used for Master Task Order contracts to track the CUMULATIVE amount of all Individual Task Orders issued against the cap amount. Each time an Individual Task Order record is created that spends against the Maximum, this CUMULATIVE must change. This is why ONLY for Master Task Order records the Maximum Amount field could potentially change if funds are added to increase the overall "cap".
Program Manager	Select the name of the person within the department that will lead the project described in the contract. This is the individual who will have direct access to the vendor's work and/or work product and be able to evaluate and rate the vendor's performance.
Budget Amount	The Budget field is an OPTIONAL field that must be populated by the Contract Administrator if the CMS Financials functionality is being used to track invoices or individual task order spend against the Maximum or “Not to exceed” amount of the contract. The Budget field will equal the "CUMULATIVE Maximum Contract Dollar Amount" field. In the case of Master Task Order Contracts, the Budget field will equal the "Maximum Amount" field.
Notes	This Notes field should be kept as brief as possible. The field is free form.
Custom Field 1	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 2	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 3	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Entered By	Field will auto populate with name of person creating the initial contract record. Cannot be changed.
Entered on Date	Field will auto populate with the date the contract record was originally created. Cannot be changed.
Updated By	This field will auto populate each time a contract record is modified. Cannot be changed.
Updated on Date	This field will auto populate each time a contract record is modified. Cannot be changed.

Construction Umbrella Contract Type

FINAL FIELD LABELS	Help Screen Text
CMS Identification #	Field is automatically generated in sequential order of contract record entry. Does not number within a Department but Statewide across all departments.
Contract Title	Enter a short name for the project defined in the contract. Ex: Financial Advisory Services.
Contract Purpose	Enter a short description of the work the vendor is being hired to perform.
Fiscal Year	This is an OPTIONAL Field. Type in 4 digit year reflective of the fiscal year contract performance will begin.
Construction Project Number	This number is provided by staff and not something assigned by the contract/purchasing office.
Contractor/Vendor	Select the Name of the Vendor. If the vendor needed is not listed, complete a New Vendor Request form and submit to the OIT Service Desk. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
FEIN	Field will display only last 4 digits of FEIN for security purposes. Field will populate once record is saved. Verify that the FEIN belongs to the vendor selected.
Contract Administrator	Will default to person entering the contract record. Change this if another employee will be responsible for updates to the contract record. Change the contract administrator last since once changed only that person can make further edits.
Unique Department Contract Number	This field is OPTIONAL. Use if the Department has a unique numbering convention.
Original Contract CLIN or other Identifying Number	This is an OPTIONAL Field. If your contract preceded July 1, 2009 and has some type of identifying contract routing number associated with it (e.g. CLIN number or Department Contract Number), enter that number in this field. If entering a Modification, enter the CMS number of the contract being modified.
Purchase Order or Encumbrance Number	This is an OPTIONAL Field. Enter the alpha-numeric PO# or other Encumbrance number. Ex: SC EGB C0800022-10
Agency/IHE (Department) Name	Field will default to the department of the person entering the contract record.
Agency/IHE (Department) Code	Select the matching department code of the person entering the contract record. Will match the 3 character COFRS Agency Code.
Effective Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the date that document is fully executed. Since this field must be populated for record creation, if contract is not yet fully executed, enter an estimated date. This field can be modified once final signature obtained but then does NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Expiration Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the expiration date of that document NOT including possible renewals/extensions. Ex: for a 1-year contract effective June 1, 2009, the End Date will be May 31, 2010. This field will NOT change. Keep in mind that Construction contracts typically include warranty periods beyond the stated completion dates; do not forget to consider them in the calculation. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Performance Period Start Date	REMEMBER - Dates entered must relate to the specific record you are working in. In most cases, this entry will betriggered by the ussuance of a separate Notice to Proceed document (should be attached to the contract record), or similar letter, but it could equal the Effective Date field for the first term of the contract when original performance begins. This date reflects when the contract performance begins. This date does NOT change if/when a mod to extend the End Date (or renew the contract period) is executed.
LATEST Performance Period End Date	REMEMBER - The dates entered must relate to the specific Construction contract record you are working in. In most cases, this entry will be the same as the Expiration Date field for the first term of the contract when original performance begins. This date WILL CHANGE when new contract term begins, or upon execution of a change order or other modification extending the term for performance. Ex: Effective Date of Original Contract was 05/10/2010 and Expiration Date of the Original Contract was 04/30/2011, and renewing for another 1 year term, then this LATEST date will change from 04/30/2011 to 04/30/2012. This is the date on which the Notify Days field bases the alerts.
Number of renewal periods	This is a reportable field. Select how many additional years the contract can be renewed if needed and able. Ex: If have a 1-year contract with Option to renew for 4 additional 1-year periods, select 4-years. If the contract is for 1-year with a holdover provision, then < 1-year would be selected.
Contract Group/Type	Entry will default initially to the selected Umbrella Contract Type. If a more specific subcategory applies, the next field should be changed to be reflective of the specific type of contract being executed.
Contract Sub-Type	Change this field if a more specific sub-category applies to the contract being executed. Ex: If selected Personal Services as the Umbrella Contract Type and will be entering into a Grant Agreement, change this field to "Grants" to more specifically identify the type of Personal Services contract. If the subcategory selected is "Master Task Order" make sure to read the Help text for both "Maximum Contract Amount of the Original contract," and CUMULATIVE Maximum Contract Dollar Amount.
Maximum Amount	REMEMBER - The dollar amounts entered must relate to the specific record you are working in. Ex: If entering a Master Task Order Agreement then enter the MAXIMUM dollar amount payable under this contract at time of signing - generally this is the "Not to Exceed" amount. This field will not change unless the record is for a Master Task Order. Only for a Master Task Order record would this field potentially change if funds are added to increase the "cap" amount that all Task Orders combined cannot exceed.
CUMULATIVE Maximum Contract Dollar Amount (For Master Task Orders read Help text for instruction)	When adding money to the original contract, this field is modified. Dollars entered will reflect the original contract amount PLUS any/all modifications adding money. Ex: Maximum Contract Amount of the Original contract = $100,000 then amend the contract to add an additional $100,000, enter $200,000 in this field. This field is also used for Master Task Order contracts to track the CUMULATIVE amount of all Individual Task Orders issued against the cap amount. Each time an Individual Task Order record is created that spends against the Maximum, this CUMULATIVE must change. This is why ONLY for Master Task Order records the Maximum Amount field could potentially change if funds are added to increase the overall "cap".
Solicitation Method Used	Select from drop down choices. Authorized by Statute can be used for either a Vendor specified in the law or a Law Specified Selection Method. If solicitation method used is not included in the list, select "OTHER" and complete the next field. If "OTHER" is selected, the next field MUST be completed. This is a reportable field - do not leave it blank.
If selected OTHER, enter the Method used	This field MUST be completed if "OTHER" is selected in the "Solicitation Method Used" field. "OTHER" could include: BVB - Best Value Bidding, RA - Reverse Auctions, CN - Competitive Negotiations, PAQR - Price Agreement Quote Requests , PPI = Public-Private Initiative, Court Ordered.
Solicitation Number	Enter identifying number on solicitation. Ex: DAA-RFP-JC10-001 or HAA DQ 10-150 SW or KAA-20100650-P
If this is a Sole Source, was a "Sole Source Justification and Certification" form completed, and placed in contract file, that includes the mandatory determination steps?	Completion of the "State of Colorado Sole Source Justification" form is required to proceed with a Sole Source solicitation. This is a reportable field. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms." The completed form should be scanned and attached to the contract record.
Sole Source Justification	Select one of the 5 options in the drop down list. If "OTHER" is selected, complete the next field. Start the "No" response with "Sole Source Justification: ___"
If selected OTHER, enter the justification for the Source.	This field MUST be completed if" OTHER" is selected in the "Sole source Justification" field. Entry should reflect what is on the actual Sole source Justification and Certification form. Start the "No" response with "Sole Source Justification: ___"

Select ALL steps taken in making the Sole Source determination	Statute requires identification of all steps taken towards making the determination that the vendor is the only available source. At least one of the 3 options must have been taken and selected. See Section 1.5 of the Sole Source Justification form. To select more than one from this list, hold the Ctrl key while clicking on each selection.
Is this a Statutory Violation?	Select "Yes" if Vendor/Contractor began work, or the State made payments, prior to the Effective date of the Original (first contract term) contract.
Is this a High Risk or Low Risk Contract?	This is an OPTIONAL field. Refer to OSC Policy "Automatic High and Low Risk Contracts" for assistance in making this determination. Policies available on OSC website.
Is the Contractor/Vendor performing work previously performed by State Employee(s)?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (1)
How many positions (FTE) is the Contractor/Vendor filling that were previously performed by State Employees?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (2)
For work previously performed by State Employees, how long did the Contractor perform the work? (# of months)	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (3)
How many positions were ELIMINATED by the Contractor/Vendor performing this Work?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (4)
Number of State Jobs Created	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (5)
Duration of State Jobs Created	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (6)
What Quality Improvements did the State gain by having Contractor/Vendor do the Work previously performed by State Employees?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (7)
What Dollar ($) Savings did the State gain by having Contractor/Vendor do the Work previously performed by State Employees?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (8)
Program Manager	Select the name of the person within the department that will lead the project described in the contract. This is the individual who will have direct access to the vendor's work and/or work product and be able to evaluate/rate the vendor's performance.
Has this contract been Certified as including: Performance Measures and Standards, Methods for Resolution, and Types of Monitoring Processes?	Statute requires an affirmative determination that the contract includes Performance Measures and Standards AND Methods for Resolution of Noncompliance AND Types of Monitoring Processes before contract is finalized. Selecting "Yes" in this field certifies (affirms) the contract does contain all of these provisions. OSC has made a Certification form available for use in support of this electronic certification ("Performance Measures and Standards Certification - Original Contract"). If used, the form should be made part of the contract file, scanned and attached to the contract record. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
If this contract has been renewed/extended, has the contractor's previous work been certified (affirmed) as complying with the terms of the contract?	Statute requires "recertification" every 12-months that the vendor has performed per the contract. This may or may not align with renewal of the contract. OSC has made an "Annual Certification" form available for use in support of this electronic certification ("CMS Annual Certification"). If used, the form should be made part of the contract file, scanned and attached to the contract record. Ex: A contract with an initial term of 3 years (5/1/2010 through 4/30/2013) with options to renew for 2 additional 1-year periods will have to certify on 4/1/2011 before work can continue, on 4/30/2012 before work can continue and on 4/30/2013 if the contract is extended. For contracts entered into with an initial term of 1-year, the certification process should occur prior to extension for each additional term. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
If applicable, enter date of MOST RECENT annual certification of contractor's work.	At the end of each contract period, certification of the vendor's compliance with the terms of the contract, must occur. This date will change if/when the vendor's work is certified over the lifetime of the contract. If extending a contract, the field in the Modification record must also be completed.
Final Contractor/Vendor Rating (no renewal periods remain)	REMEMBER - Keep in mind the record you are entering/updating. If you are entering data into a Master or Original/Underlying Contract then this field is for use in reporting the FINAL rating assigned a vendor after all renewals/extensions of the contract. Individual Task Order evaluations/ratings will "add up" for use in assigning a FINAL rating at the end of the entire Master Contract term. If the vendor was evaluated quarterly, yearly etc., those interim ratings can be recorded in the NOTES fields and the FINAL rating added to this field at the END of the full contract. If you are entering data into an Individual Task Order record then this field is OPTIONAL and not published onto the public website but rather becomes part of the information used at the end of the entire Master Contract term. The FINAL ratings entered into a Master or Original/Underlying Contract record, should be reflective of performance over the life of the contract using the following ratings: 1=Below Standard: Contractor's performance under the contract has failed to meet all specifications/requirements of the contract. Support documentation is required for this rating and should be scanned and attached to the contract record. 2=Standard: Contractor's performance under the contract has met all specifications/requirements of the contract. 3=Above Standard: Contractor's performance under the contract has exceeded specifications/requirements of the contract. Support documentation is required for this rating and should be scanned and attached to the contract record. The final rating could be a compilation of interim ratings throughout the term of the contract. Ex: If over a five year contract the vendor was rated as: Year-1 = Standard (2), Year-2 = Standard (2), Year-3 = Above Standard (3), Year-4 = Above Standard, Year-5 = Standard (2) then the Final Rating would be: (2+2+3+3+2)/5 or 2.4 = Standard. Supporting documentation to this should appear in the contract file. This is a Reportable Field.
When was the Rating sent to the Contractor/Vendor?	REMEMBER - Keep in mind the record you are entering/updating. Vendor must be notified immediately upon FINAL Rating as this is the value that will be shown on the public website, and the vendor needs to be given time to submit comment before the public posting. Posting will occur within 30-days of contract completion. Interim ratings that are recorded in Notes Fields will not go public. Only what is placed in the "Final Contractor/Vendor Rating" field in the Master or Original/Underlying Contract record will post publically. If the vendor is being sent a rating for the Individual Task Order, it should be sent in a timely manner in order to record performance prior to issuance of subsequent task orders and/or to make an annual performance certification determination. Information entered into an Individual Task Order record will not post onto the public website.
Did the Contractor/Vendor submit responses to its Evaluation?	REMEMBER - Keep in mind the record you are entering/updating. If you are entering data into a Master or Original/Underlying Contract record and if the Contractor submitted responses to its FINAL rating and evaluation, a copy should be attached to the contract record and copied into the Vendor Comments Field for transfer to the public website. Any interim ratings and evaluations shared with the vendor to which the vendor also responded can also be attached but are not recorded in this field. If you are entering data into an Individual Task Order record, and the vendor is sent a rating for the Individual Task Order, it should be sent in a timely manner in order to record performance prior to issuance of subsequent task orders and/or to make a recertification determination. Information entered into an Individual Task Order record will not post onto the public website.
Did the Contractor/Vendor submit Comments as to the State's performance under the Contract?	If the Vendor commented on how the State's employees performed during the term of the contract, a copy should be included in the contract record - either in the paper file or attached in CMS.
Contractor/Vendor Comments/Responses	REMEMBER - Keep in mind the record you are entering/updating. If you are entering data into a Master or Original/Underlying Contract record and if the Contractor submitted responses to its FINAL rating and evaluation, such comments must be entered here. If the vendor submitted comments electronically, simply cut and paste. If the vendor submitted hardcopy, enter EXACTLY what was written by the vendor. This field will show on the public website - check spelling and wording for accuracy. If you are entering data into an Individual Task Order record these will not post onto the public website.

If the Contract is for Construction, when was an Evaluation Performance Report prepared?	Per statute, a Construction Report needs to be prepared within 30-days of contract completion – for construction contracts this means the end of the contractor warranty period. OSC has created a Report Template/Form - "Construction Contractor Performance Evaluation Report." The template can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
Did the Contractor/Vendor DISPUTE the Evaluation?	Disputing an evaluation is different from submitting comments. Disputes are a formal process requiring the vendor to complete the form entitled "Contractor's Statement of Rebuttal to Performance Evaluation." If yes selected, a copy should be included in the contract record - either in the paper file and attached to the CMS record, AND a note must be made in the Contractor/Vendor Comments field stating: "On MM/DD/YYYY the Vendor submitted a rebuttal statement."
Did the Contractor/Vendor DISPUTE the Construction Report?	Disputing a Construction Report is different from submitting comments. Disputes are a formal process requiring the vendor to complete the form entitled "Contractor's Statement of Rebuttal to Performance Evaluation." If "Yes" selected, a copy should be included in the contract record - in the paper file and attached to the CMS record, AND a note must be made in the Contractor/Vendor Comments field stating: "On MM/DD/YYYY the Vendor submitted a rebuttal statement." The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
Budget Amount	The Budget field is an OPTIONAL field that must be populated by the Contract Administrator if the CMS Financials functionality is being used to track invoices or individual task order spend against the Maximum or "Not to exceed" amount of the contract. The Budget field will equal the "CUMULATIVE Maximum Contract Dollar Amount" field. In the case of Master Task Order Contracts, the Budget field will equal the "Maximum Amount" field.
Notes	This Notes field should be kept as brief as possible. The field is free form.
Custom Field 1	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 2	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 3	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Entered By	Field will auto populate with name of person creating the initial contract record. Cannot be changed.
Entered on Date	Field will auto populate with the date the contract record was originally created. Cannot be changed.
Updated By	This field will auto populate each time a contract record is modified. Cannot be changed.
Updated on Date	This field will auto populate each time a contract record is modified. Cannot be changed.

This Umbrella includes the following sub-contract types:
> Construction
> OSA - Architect-Engineer Agreement (CM/GC Std Format) SC-5.2
> OSA-Architect-Engineer Agreement sc5.1
>OSA-Architect-Engineer As-Needed sc5.1A-S
>OSA-Constr.Mgt/Gen.Contractor Agreement (CM/GC Std Format)-SC-6.4
>OSA-Consultant Agreement sc5.3
> OSA-Contractor's Agreement sc621

LOANS (State as Lender) - Umbrella Contract Type	No sub-contract Types
FINAL FIELD LABELS	**Help Screen Text**
CMS Identification #	Field is automatically generated in sequential order of contract record entry. Does not number within a Department but Statewide across all departments.
Contract Title	Enter a short name for the project defined in the contract. Ex: Financial Advisory Services.
Contract Purpose	Enter a short description of the work the vendor is being hired to perform.
Fiscal Year	This is an OPTIONAL Field. Type in 4 digit year reflective of the fiscal year contract performance will begin.
Contractor/Vendor	Select the Name of the Vendor. If the vendor needed is not listed, complete a New Vendor Request form and submit to the OIT Service Desk. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
FEIN	Field will display only last 4 digits of FEIN for security purposes. Field will populate once record is saved. Verify that the FEIN belongs to the vendor selected.
Contract Administrator	Will default to person entering the contract record. Change this if another employee will be responsible for updates to the contract record. Change the contract administrator last since once changed only that person can make further edits.
Unique Department Contract Number	This field is OPTIONAL. Use if the Department has a unique numbering convention.
Original Contract CLIN or other Identifying Number	This is an OPTIONAL Field. If your contract preceded July 1, 2009 and has some type of identifying contract routing number associated with it (e.g. CLIN number or Department Contract Number), enter that number in this field. If entering a Modification, enter the CMS number of the contract being modified.
Purchase Order or Encumbrance Number	This is an OPTIONAL Field. Enter the alpha-numeric PO# or other Encumbrance number. Ex: SC EGB C0800022-10
Agency/IHE (Department) Name	Field will default to the department of the person entering the contract record.
Agency/IHE (Department) Code	Select the matching department code of the person entering the contract record. Will match the 3 character COFRS Agency Code.
Effective Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the date that document is fully executed. Since this field must be populated for record creation, if contract is not yet fully executed, enter an estimated date. This field can be modified once final signature obtained but then does NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Expiration Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the expiration date of that document NOT including possible renewals/extensions. Ex: for a 1-year contract effective June 1, 2009, the End Date will be May 31, 2010. This field will NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Performance Period Start Date	REMEMBER - Dates entered must relate to the specific record you are working in. In most cases, this entry will equal the Effective Date field for the first term of the contract when original performance begins. This date reflects when the contract performance begins. This date does NOT change if/when a mod to extend the End Date (or renew the contract period) is executed.
LATEST Performance Period End Date	REMEMBER - The dates entered must relate to the specific record you are working in. In most cases, this entry will be the same as the Expiration Date field for the first term of the contract when original performance begins. This date WILL CHANGE when new contract term begins. Ex: Effective Date of Original Contract was 05/10/2010 and Expiration Date of the Original Contract was 04/30/2011, and renewing for another 1 year term, then this LATEST date will change from 04/30/2011 to 04/30/2012. This is the date on which the Notify Days field bases the alerts.
Number of renewal periods	This is a reportable field. Select how many additional years the contract can be renewed if needed and able. Ex: If have a 1-year contract with Option to renew for 4 additional 1-year periods, select 4-years. If the contract is for 1-year with a holdover provision, then < 1-year would be selected.
Contract Group/Type	Entry will default initially to the selected Umbrella Contract Type. If a more specific subcategory applies, the next field should be changed to be reflective of the specific type of contract being executed.
Is this a Statutory Violation?	Select "Yes" if Vendor/Contractor began work, or the State made payments, prior to the Effective date of the Original (first contract term) contract.
Is this a High Risk or Low Risk Contract?	This is an OPTIONAL field. Refer to OSC Policy "Automatic High and Low Risk Contracts" for assistance in making this determination. Policies available on OSC website.
Program Manager	Select the name of the person within the department that will lead the project described in the contract. This is the individual who will have direct access to the vendor's work and/or work product and be able to evaluate and rate the vendor's performance.
Notes	This Notes field should be kept as brief as possible. The field is free form.
Custom Field 1	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 2	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 3	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Entered By	Field will auto populate with name of person creating the initial contract record. Cannot be changed.
Entered on Date	Field will auto populate with the date the contract record was originally created. Cannot be changed.
Updated By	This field will auto populate each time a contract record is modified. Cannot be changed.
Updated on Date	This field will auto populate each time a contract record is modified. Cannot be changed.

REVENUE (Money from non-State entity) - Umbrella Contract Type	No sub-contract Types
FINAL FIELD LABELS	**Help Screen Text**
CMS Identification #	Field is automatically generated in sequential order of contract record entry. Does not number within a Department but Statewide across all departments.
Contract Title	Enter a short name for the project defined in the contract. Ex: Financial Advisory Services.
Contract Purpose	Enter a short description of the work the vendor is being hired to perform.
Fiscal Year	This is an OPTIONAL Field. Type in 4 digit year reflective of the fiscal year contract performance will begin.
Contractor/Vendor	Select the Name of the Vendor. If the vendor needed is not listed, complete a New Vendor Request form and submit to the OIT Service Desk. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
FEIN	Field will display only last 4 digits of FEIN for security purposes. Field will populate once record is saved. Verify that the FEIN belongs to the vendor selected.
Contract Administrator	Will default to person entering the contract record. Change this if another employee will be responsible for updates to the contract record. Change the contract administrator last since once changed only that person can make further edits.
Unique Department Contract Number	This field is OPTIONAL. Use if the Department has a unique numbering convention.
Original Contract CLIN or other Identifying Number	This is an OPTIONAL Field. If your contract preceded July 1, 2009 and has some type of identifying contract routing number associated with it (e.g. CLIN number or Department Contract Number), enter that number in this field. If entering a Modification, enter the CMS number of the contract being modified.
Agency/IHE (Department) Name	Field will default to the department of the person entering the contract record.
Agency/IHE (Department) Code	Select the matching department code of the person entering the contract record. Will match the 3 character COFRS Agency Code.
Effective Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the date that document is fully executed. Since this field must be populated for record creation, if contract is not yet fully executed, enter an estimated date. This field can be modified once final signature obtained but then does NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Expiration Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the expiration date of that document NOT including possible renewals/extensions. Ex: for a 1-year contract effective June 1, 2009, the End Date will be May 31, 2010. This field will NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Performance Period Start Date	REMEMBER - Dates entered must relate to the specific record you are working in. In most cases, this entry will equal the Effective Date field for the first term of the contract when original performance begins. This date reflects when the contract performance begins. This date does NOT change if/when a mod to extend the End Date (or renew the contract period) is executed.
LATEST Performance Period End Date	REMEMBER - The dates entered must relate to the specific record you are working in. In most cases, this entry will be the same as the Expiration Date field for the first term of the contract when original performance begins. This date WILL CHANGE when new contract term begins. Ex: Effective Date of Original Contract was 05/10/2010 and Expiration Date of the Original Contract was 04/30/2011, and renewing for another 1 year term, then this LATEST date will change from 04/30/2011 to 04/30/2012. This is the date on which the Notify Days field bases the alerts.
Number of renewal periods	This is a reportable field. Select how many additional years the contract can be renewed if needed and able. Ex: If have a 1-year contract with Option to renew for 4 additional 1-year periods, select 4-years. If the contract is for 1-year with a holdover provision, then < 1-year would be selected.
Contract Group/Type	Entry will default initially to the selected Umbrella Contract Type. If a more specific subcategory applies, the next field should be changed to be reflective of the specific type of contract being executed.
Amount Received under the Contract	Enter the dollar amount **promised to** the State under the Agreement.
Program Manager	Select the name of the person within the department that will lead the project described in the contract. This is the individual who will have direct access to the vendor's work and/or work product and be able to evaluate and rate the vendor's performance.
Notes	This Notes field should be kept as brief as possible. The field is free form.
Custom Field 1	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 2	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 3	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Entered By	Field will auto populate with name of person creating the initial contract record. Cannot be changed.
Entered on Date	Field will auto populate with the date the contract record was originally created. Cannot be changed.
Updated By	This field will auto populate each time a contract record is modified. Cannot be changed.
Updated on Date	This field will auto populate each time a contract record is modified. Cannot be changed.

SETTLEMENT (Amendment or Stand-alone) - Umbrella Contract Type	No sub-contract Types
FINAL FIELD LABELS	**Help Screen Text**
CMS Identification #	Field is automatically generated in sequential order of contract record entry. Does not number within a Department but Statewide across all departments.
Contract Title	Enter a short name for the project defined in the contract. Ex: Financial Advisory Services.
Contract Purpose	Enter a short description of the work the vendor is being hired to perform.
Fiscal Year	This is an OPTIONAL Field. Type in 4 digit year reflective of the fiscal year contract performance will begin.
Contractor/Vendor	Select the Name of the Vendor. If the vendor needed is not listed, complete a New Vendor Request form and submit to the OIT Service Desk. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
FEIN	Field will display only last 4 digits of FEIN for security purposes. Field will populate once record is saved. Verify that the FEIN belongs to the vendor selected.
Contract Administrator	Will default to person entering the contract record. Change this if another employee will be responsible for updates to the contract record. Change the contract administrator last since once changed only that person can make further edits.
Unique Department Contract Number	This field is OPTIONAL. Use if the Department has a unique numbering convention.
Original Contract CLIN or other Identifying Number	This is an OPTIONAL Field. If your contract preceded July 1, 2009 and has some type of identifying contract routing number associated with it (e.g. CLIN number or Department Contract Number), enter that number in this field. If entering a Modification, enter the CMS number of the contract being modified.
Purchase Order or Encumbrance Number	This is an OPTIONAL Field. Enter the alpha-numeric PO# or other Encumbrance number. Ex: SC EGB C0800022-10
Agency/IHE (Department) Name	Field will default to the department of the person entering the contract record.
Agency/IHE (Department) Code	Select the matching department code of the person entering the contract record. Will match the 3 character COFRS Agency Code.
Effective Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the date that document is fully executed. Since this field must be populated for record creation, if contract is not yet fully executed, enter an estimated date. This field can be modified once final signature obtained but then does NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Expiration Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the expiration date of that document NOT including possible renewals/extensions. Ex: for a 1-year contract effective June 1, 2009, the End Date will be May 31, 2010. This field will NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Performance Period Start Date	REMEMBER - Dates entered must relate to the specific record you are working in. In most cases, this entry will equal the Effective Date field for the first term of the contract when original performance begins. This date reflects when the contract performance begins. This date does NOT change if/when a mod to extend the End Date (or renew the contract period) is executed.
LATEST Performance Period End Date	REMEMBER - The dates entered must relate to the specific record you are working in. In most cases, this entry will be the same as the Expiration Date field for the first term of the contract when original performance begins. This date WILL CHANGE when new contract term begins. Ex: Effective Date of Original Contract was 05/10/2010 and Expiration Date of the Original Contract was 04/30/2011, and renewing for another 1 year term, then this LATEST date will change from 04/30/2011 to 04/30/2012. This is the date on which the Notify Days field bases the alerts.
Number of renewal periods	This is a reportable field. Select how many additional years the contract can be renewed if needed and able. Ex: If have a 1-year contract with Option to renew for 4 additional 1-year periods, select 4-years. If the contract is for 1-year with a holdover provision, then < 1-year would be selected.
Contract Group/Type	Entry will default initially to the selected Umbrella Contract Type. If a more specific subcategory applies, the next field should be changed to be reflective of the specific type of contract being executed.
Amount Received under the Contract	Enter the dollar amount **promised to** the State under the Agreement.
Is this a High Risk or Low Risk Contract?	This is an OPTIONAL field. Refer to OSC Policy "Automatic High and Low Risk Contracts" for assistance in making this determination. Policies available on OSC website.
Program Manager	Select the name of the person within the department that will lead the project described in the contract. This is the individual who will have direct access to the vendor's work and/or work product and be able to evaluate and rate the vendor's performance.
Notes	This Notes field should be kept as brief as possible. The field is free form.
Custom Field 1	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 2	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 3	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Entered By	Field will auto populate with name of person creating the initial contract record. Cannot be changed.
Entered on Date	Field will auto populate with the date the contract record was originally created. Cannot be changed.
Updated By	This field will auto populate each time a contract record is modified. Cannot be changed.
Updated on Date	This field will auto populate each time a contract record is modified. Cannot be changed.

Vendor Agreements (Used only for <$5,000) - Umbrella Contract Type

No sub-contract Types

FINAL FIELD LABELS	Help Screen Text
CMS Identification #	Field is automatically generated in sequential order of contract record entry. Does not number within a Department but Statewide across all departments.
Contract Title	Enter a short name for the project defined in the contract. Ex: Financial Advisory Services.
Contract Purpose	Enter a short description of the work the vendor is being hired to perform.
Fiscal Year	Field will display only last 4 digits of FEIN for security purposes. Field will populate once record is saved. Verify that the FEIN belongs to the vendor selected.
Contractor/Vendor	Will default to person entering the contract record. Change this if another employee will be responsible for updates to the contract record. Change the contract administrator last since once changed only that person can make further edits.
FEIN	Field will display only last 4 digits of FEIN for security purposes. Field will populate once record is saved. Verify that the FEIN belongs to the vendor selected.
Contract Administrator	Will default to person entering the contract record. Change this if another employee will be responsible for updates to the contract record. Change the contract administrator last since once changed only that person can make further edits.
Unique Department Contract Number	This field is OPTIONAL. Use if the Department has a unique numbering convention.
Original Contract CLIN or other Identifying Number	This is an OPTIONAL Field. If your contract preceded July 1, 2009 and has some type of identifying contract routing number associated with it (e.g. CLIN number or Department Contract Number), enter that number in this field. If entering a Modification, enter the CMS number of the contract being modified.
Purchase Order or Encumbrance Number	This is an OPTIONAL Field. Enter the alpha-numeric PO# or other Encumbrance number. Ex: SC EGB C0800022-10
Agency/IHE (Department) Name	Field will default to the department of the person entering the contract record.
Agency/IHE (Department) Code	Select the matching department code of the person entering the contract record. Will match the 3 character COFRS Agency Code.
Effective Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the date that document is fully executed. Since this field must be populated for record creation, if contract is not yet fully executed, enter an estimated date. This field can be modified once final signature obtained but then does NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Expiration Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the expiration date of that document NOT including possible renewals/extensions. Ex: for a 1-year contract effective June 1, 2009, the End Date will be May 31, 2010. This field will NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Performance Period Start Date	REMEMBER - Dates entered must relate to the specific record you are working in. In most cases, this entry will equal the Effective Date field for the first term of the contract when original performance begins. This date reflects when the contract performance begins. This date does NOT change if/when a mod to extend the End Date (or renew the contract period) is executed.
LATEST Performance Period End Date	REMEMBER - The dates entered must relate to the specific record you are working in. In most cases, this entry will be the same as the Expiration Date field for the first term of the contract when original performance begins. This date WILL CHANGE when new contract term begins. Ex: Effective Date of Original Contract was 05/10/2010 and Expiration Date of the Original Contract was 04/30/2011, and renewing for another 1 year term, then this LATEST date will change from 04/30/2011 to 04/30/2012. This is the date on which the Notify Days field bases the alerts.
Number of renewal periods	This is a reportable field. Select how many additional years the contract can be renewed if needed and able. Ex: If have a 1-year contract with Option to renew for 4 additional 1-year periods, select 4-years. If the contract is for 1-year with a holdover provision, then < 1-year would be selected.
Contract Group/Type	Entry will default initially to the selected Umbrella Contract Type. If a more specific subcategory applies, the next field should be changed to be reflective of the specific type of contract being executed.
Maximum Amount	REMEMBER - The dollar amounts entered must relate to the specific record you are working in. Ex: If entering a Master Task Order Agreement then enter the MAXIMUM dollar amount payable under this contract at time of signing - generally this is the "Not to Exceed" amount. This field will not change unless the record is for a Master Task Order. Only for a Master Task Order record would this field potentially change if funds are added to increase the "cap" amount that all Task Orders combined cannot exceed.
CUMULATIVE Maximum Contract Dollar Amount (For Master Task Orders read Help text for instruction)	When adding money to the original contract, this field is modified. Dollars entered will reflect the original contract amount PLUS any/all modifications adding money. Ex: Maximum Contract Amount of the Original contract = $100,000 then amend the contract to add an additional $100,000, enter $200,000 in this field. This field is also used for Master Task Order contracts to track the CUMULATIVE amount of all Individual Task Orders issued against the cap amount. Each time an Individual Task Order record is created that spends against the Maximum, this CUMULATIVE must change. This is why ONLY for Master Task Order records the Maximum Amount field could potentially change if funds are added to increase the overall "cap".
Solicitation Method Used	Select from drop down choices. Authorized by Statute can be used for either a Vendor specified in the law or a Law Specified Selection Method. If solicitation method used is not included in the list, select "OTHER" and complete the next field. If "OTHER" is selected, the next field MUST be completed. This is a reportable field - do not leave it blank.
If selected OTHER, enter the Method used	This field MUST be completed if "OTHER" is selected in the "Solicitation Method Used" field. "OTHER" could include: BVB - Best Value Bidding, RA - Reverse Auctions, CN - Competitive Negotiations, PAQR - Price Agreement Quote Requests , PPI = Public-Private Initiative, Court Ordered.
Solicitation Number	Enter identifying number on solicitation. Ex: DAA-RFP-JC10-001 or HAA DQ 10-150 SW or KAA-20100650-P
Is this a Statutory Violation?	Select "Yes" if Vendor/Contractor began work, or the State made payments, prior to the Effective date of the Original (first contract term) contract.
Is this a High Risk or Low Risk Contract?	This is an OPTIONAL field. Refer to OSC Policy "Automatic High and Low Risk Contracts" for assistance in making this determination. Policies available on OSC website.
Are Services ANTICIPATED to occur outside of Colorado?	This information should be part of the vendor's solicitation response AND specified in the contract Statement of Work (SOW).
Are Services ANTICIPATED to occur outside of the United States?	This information should be part of the vendor's solicitation response AND specified in the contract Statement of Work (SOW).
Is the Contractor/Vendor performing work previously performed by State Employee(s)?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (1)
How many positions (FTE) is the Contractor/Vendor filling that were previously performed by State Employees?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (2)

For work previously performed by State Employees, how long did the Contractor perform the work? (# of months)	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (3)
How many positions were ELIMINATED by the Contractor/Vendor performing this Work?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (4)
Number of State Jobs Created	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (5)
Duration of State Jobs Created	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (6)
What Quality Improvements did the State gain by having Contractor/Vendor do the Work previously performed by State Employees?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (7)
What Dollar ($) Savings did the State gain by having Contractor/Vendor do the Work previously performed by State Employees?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (8)
Percentage of work ACTUALLY performed outside of Colorado.	This may or may not be the same as what was anticipated in the vendor's solicitation response. For Master Task Order contracts, the vendor must provide a total percentage representing work performed under ALL individual task orders issued under the Master Contract. This field is populated at the completion of the Master Contract term.
Percentage of work ACTUALLY performed outside of the United States.	This may or may not be the same as what was anticipated in the vendor's solicitation response. For Master Task Order contracts, the vendor must provide a total percentage representing work performed under ALL individual task orders issued under the Master Contract. This field is populated at the completion of the Master Contract term.
Program Manager	Select the name of the person within the department that will lead the project described in the contract. This is the individual who will have direct access to the vendor's work and/or work product and be able to evaluate and rate the vendor's performance.
Budget Amount	The Budget field is an OPTIONAL field that must be populated by the Contract Administrator if the CMS Financials functionality is being used to track invoices or individual task order spend against the Maximum or “Not to exceed” amount of the contract. The Budget field will equal the "CUMULATIVE Maximum Contract Dollar Amount" field. In the case of Master Task Order Contracts, the Budget field will equal the "Maximum Amount" field.
Notes	This Notes field should be kept as brief as possible. The field is free form.
Custom Field 1	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 2	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 3	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Entered By	Field will auto populate with name of person creating the initial contract record. Cannot be changed.
Entered on Date	Field will auto populate with the date the contract record was originally created. Cannot be changed.
Updated By	This field will auto populate each time a contract record is modified. Cannot be changed.
Updated on Date	This field will auto populate each time a contract record is modified. Cannot be changed.

Commodities/Goods Umbrella Contract Type	
FINAL FIELD LABELS	**Help Screen Text**
CMS Identification #	Field is automatically generated in sequential order of contract record entry. Does not number within a Department but Statewide across all departments.
Contract Title	Enter a short name for the project defined in the contract. Ex: Financial Advisory Services.
Contract Purpose	Enter a short description of the work the vendor is being hired to perform.
Fiscal Year	This is an OPTIONAL Field. Type in 4 digit year reflective of the fiscal year contract performance will begin.
Contractor/Vendor	Select the Name of the Vendor. If the vendor needed is not listed, complete a New Vendor Request form and submit to the OIT Service Desk. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
FEIN	Field will display only last 4 digits of FEIN for security purposes. Field will populate once record is saved. Verify that the FEIN belongs to the vendor selected.
Contract Administrator	Will default to person entering the contract record. Change this if another employee will be responsible for updates to the contract record. Change the contract administrator last since once changed only that person can make further edits.
Unique Department Contract Number	This field is OPTIONAL. Use if the Department has a unique numbering convention.
Original Contract CLIN or other Identifying Number	This is an OPTIONAL Field. If your contract preceded July 1, 2009 and has some type of identifying contract routing number associated with it (e.g. CLIN number or Department Contract Number), enter that number in this field. If entering a Modification, enter the CMS number of the contract being modified.
Purchase Order or Encumbrance Number	This is an OPTIONAL Field. Enter the alpha-numeric PO# or other Encumbrance number. Ex: SC EGB C0800022-10
Agency/IHE (Department) Name	Field will default to the department of the person entering the contract record.
Agency/IHE (Department) Code	Select the matching department code of the person entering the contract record. Will match the 3 character COFRS Agency Code.
Effective Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the date that document is fully executed. Since this field must be populated for record creation, if contract is not yet fully executed, enter an estimated date. This field can be modified once final signature obtained but then does NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Expiration Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the expiration date of that document NOT including possible renewals/extensions. Ex: for a 1-year contract effective June 1, 2009, the End Date will be May 31, 2010. This field will NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Performance Period Start Date	REMEMBER - Dates entered must relate to the specific record you are working in. In most cases, this entry will equal the Effective Date field for the first term of the contract when original performance begins. This date reflects when the contract performance begins. This date does NOT change if/when a mod to extend the End Date (or renew the contract period) is executed.
LATEST Performance Period End Date	REMEMBER - The dates entered must relate to the specific record you are working in. In most cases, this entry will be the same as the Expiration Date field for the first term of the contract when original performance begins. This date WILL CHANGE when new contract term begins. Ex: Effective Date of Original Contract was 05/10/2010 and Expiration Date of the Original Contract was 04/30/2011, and renewing for another 1 year term, then this LATEST date will change from 04/30/2011 to 04/30/2012. This is the date on which the Notify Days field bases the alerts.
Number of renewal periods	This is a reportable field. Select how many additional years the contract can be renewed if needed and able. Ex: If have a 1-year contract with Option to renew for 4 additional 1-year periods, select 4-years. If the contract is for 1-year with a holdover provision, then < 1-year would be selected.
Contract Group/Type	Entry will default initially to the selected Umbrella Contract Type. If a more specific subcategory applies, the next field should be changed to be reflective of the specific type of contract being executed.
Contract Sub-Type	Change this field if a more specific sub-category applies to the contract being executed. Ex: If selected Personal Services as the Umbrella Contract Type and will be entering into a Grant Agreement, change this field to "Grants" to more specifically identify the type of Personal Services contract. If the subcategory selected is "Master Task Order" make sure to read the Help text for both "Maximum Contract Amount of the Original contract," and CUMULATIVE Maximum Contract Dollar Amount.
Maximum Amount	REMEMBER - The dollar amounts entered must relate to the specific record you are working in. Ex: If entering a Master Task Order Agreement then enter the MAXIMUM dollar amount payable under this contract at time of signing - generally this is the "Not to Exceed" amount. This field will not change unless the record is for a Master Task Order. Only for a Master Task Order record would this field potentially change if funds are added to increase the "cap" amount that all Task Orders combined cannot exceed.
CUMULATIVE Maximum Contract Dollar Amount (For Master Task Orders read Help text for instruction)	When adding money to the original contract, this field is modified. Dollars entered will reflect the original contract amount PLUS any/all modifications adding money. Ex: Maximum Contract Amount of the Original contract = $100,000 then amend the contract to add an additional $100,000, enter $200,000 in this field. This field is also used for Master Task Order contracts to track the CUMULATIVE amount of all Individual Task Orders issued against the cap amount. Each time an Individual Task Order record is created that spends against the Maximum, this CUMULATIVE must change. This is why ONLY for Master Task Order records the Maximum Amount field could potentially change if funds are added to increase the overall "cap".
Solicitation Method Used	Select from drop down choices. Authorized by Statute can be used for either a Vendor specified in the law or a Law Specified Selection Method. If solicitation method used is not included in the list, select "OTHER" and complete the next field. If "OTHER" is selected, the next field MUST be completed. This is a reportable field - do not leave it blank.
If selected OTHER, enter the Method used.	This field MUST be completed if "OTHER" is selected in the "Solicitation Method Used" field. "OTHER" could include: BVB - Best Value Bidding, RA - Reverse Auctions, CN - Competitive Negotiations, PAQR - Price Agreement Quote Requests , PPI = Public-Private Initiative, Court Ordered.
Solicitation Number	Enter identifying number on solicitation. Ex: DAA-RFP-JC10-001 or HAA DQ 10-150 SW or KAA-20100650-P
If this is a Sole Source, was a "Sole Source Justification and Certification" form completed, and placed in contract file, that includes the mandatory determination steps?	Completion of the "State of Colorado Sole Source Justification" form is required to proceed with a Sole Source solicitation. This is a reportable field. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms." The completed form should be scanned and attached to the contract record.
Sole Source Justification.	Select one of the 5 options in the drop down list. If "OTHER" is selected, complete the next field. Start the "No" response with "Sole Source Justification: ___"

If selected OTHER, enter the justification for the Source.	This field MUST be completed if" OTHER" is selected in the "Sole source Justification" field. Entry should reflect what is on the actual Sole source Justification and Certification form. Start the "No" response with "Sole Source Justification: ___"
Select ALL steps taken in making the Sole Source determination.	Statute requires identification of all steps taken towards making the determination that the vendor is the only available source. At least one of the 3 options must have been taken and selected. See Section 1.5 of the Sole Source Justification form. To select more than one from this list, hold the Ctrl key while clicking on each selection.
Is this a Statutory Violation?	Select "Yes" if Vendor/Contractor began work, or the State made payments, prior to the Effective date of the Original (first contract term) contract.
Is this a High Risk or Low Risk Contract?	This is an OPTIONAL field. Refer to OSC Policy "Automatic High and Low Risk Contracts" for assistance in making this determination. Policies available on OSC website.
Program Manager	Select the name of the person within the department that will lead the project described in the contract. This is the individual who will have direct access to the vendor's work and/or work product and be able to evaluate rate the vendor's performance.
Budget Amount	The Budget field is an OPTIONAL field that must be populated by the Contract Administrator if the CMS Financials functionality is being used to track invoices or individual task order spend against the Maximum or "Not to exceed" amount of the contract. The Budget field will equal the "CUMULATIVE Maximum Contract Dollar Amount" field. In the case of Master Task Order Contracts, the Budget field will equal the "Maximum Amount" field.
Notes	This Notes field should be kept as brief as possible. The field is free form.
Custom Field 1	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 2	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 3	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Entered By	Field will auto populate with name of person creating the initial contract record. Cannot be changed.
Entered on Date	Field will auto populate with the date the contract record was originally created. Cannot be changed.
Updated By	This field will auto populate each time a contract record is modified. Cannot be changed.
Updated on Date	This field will auto populate each time a contract record is modified. Cannot be changed.

This Umbrella includes the following sub-contract types:
> Commodities/Goods
> Lease/Purchase

Multi-Party Umbrella Contract Type

This Umbrella includes the following sub-contract types:
> Multi-party
> Real Property
> Intergovernmental

FINAL FIELD LABELS	Help Screen Text
CMS Identification #	Field is automatically generated in sequential order of contract record entry. Does not number within a Department but Statewide across all departments.
Contract Title	Enter a short name for the project defined in the contract. Ex: Financial Advisory Services.
Contract Purpose	Enter a short description of the work the vendor is being hired to perform.
Fiscal Year	This is an OPTIONAL Field. Type in 4 digit year reflective of the fiscal year contract performance will begin.
Contractor/Vendor	Select the Name of the Vendor. If the vendor needed is not listed, complete a New Vendor Request form and submit to the OIT Service Desk. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
FEIN	Field will display only last 4 digits of FEIN for security purposes. Field will populate once record is saved. Verify that the FEIN belongs to the vendor selected.
Second Contractor/Vendor	Select the Name of the Second Vendor. For an Interagency Agreement, enter the name of the RECEIVING Agency. The list of vendors was imported from COFRS or added post May 2009. If the vendor needed is not listed, complete a New Vendor Request form and submit to the OIT Service Desk. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
Second Contractor/Vendor FEIN	Field will display only last 4 digits of FEIN for security purposes. Field will populate once record is saved. Verify that the FEIN belongs to the vendor selected.
Third Contractor/Vendor	Select the Name of the Third Vendor. For an Interagency Agreement, enter the name of the RECEIVING Agency. The list of vendors was imported from COFRS or added post May 2009. If the vendor needed is not listed, complete a New Vendor Request form and submit to the OIT Service Desk. Form is available on the OSC website.
Third Contractor/Vendor FEIN	Field will display only last 4 digits of FEIN for security purposes. Field will populate once record is saved. Verify that the FEIN belongs to the vendor selected.
Contract Administrator	Will default to person entering the contract record. Change this if another employee will be responsible for updates to the contract record. Change the contract administrator last since once changed only that person can make further edits.
Unique Department Contract Number	This field is OPTIONAL. Use if the Department has a unique numbering convention.
Original Contract CLIN or other Identifying Number	This is an OPTIONAL Field. If your contract preceded July 1, 2009 and has some type of identifying contract routing number associated with it (e.g. CLIN number or Department Contract Number), enter that number in this field. If entering a Modification, enter the CMS number of the contract being modified.
Purchase Order or Encumbrance Number	This is an OPTIONAL Field. Enter the alpha-numeric PO# or other Encumbrance number. Ex: SC EGB C0800022-10
Agency/IHE (Department) Name	Field will default to the department of the person entering the contract record.
Agency/IHE (Department) Code	Select the matching department code of the person entering the contract record. Will match the 3 character COFRS Agency Code.
Second Agency/IHE (Department) Name	Select the Name of the Second Agency to the Contract. For an Interagency Agreement, enter the name of the PAYING Agency.
Third Agency/IHE (Department) Name	Select the Name of the Third Agency to the Contract. For an Interagency Agreement, enter the name of the PAYING Agency.
Effective Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the date that document is fully executed. Since this field must be populated for record creation, if contract is not yet fully executed, enter an estimated date. This field can be modified once final signature obtained but then does NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Expiration Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the expiration date of that document NOT including possible renewals/extensions. Ex: for a 1-year contract effective June 1, 2009, the End Date will be May 31, 2010. This field will NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Performance Period Start Date	REMEMBER - Dates entered must relate to the specific record you are working in. In most cases, this entry will equal the Effective Date field for the first term of the contract when original performance begins. This date reflects when the contract performance begins. This date does NOT change if/when a mod to extend the End Date (or renew the contract period) is executed.
LATEST Performance Period End Date	REMEMBER - The dates entered must relate to the specific record you are working in. In most cases, this entry will be the same as the Expiration Date field for the first term of the contract when original performance begins. This date WILL CHANGE when new contract term begins. Ex: Effective Date of Original Contract was 05/10/2010 and Expiration Date of the Original Contract was 04/30/2011, and renewing for another 1 year term, then this LATEST date will change from 04/30/2011 to 04/30/2012. This is the date on which the Notify Days field bases the alerts.
Number of renewal periods	This is a reportable field. Select how many additional years the contract can be renewed if needed and able. Ex: If have a 1-year contract with Option to renew for 4 additional 1-year periods, select 4-years. If the contract is for 1-year with a holdover provision, then < 1-year would be selected.
Contract Group/Type	Entry will default initially to the selected Umbrella Contract Type. If a more specific subcategory applies, the next field should be changed to be reflective of the specific type of contract being executed.
Contract Sub-Type	Change this field if a more specific sub-category applies to the contract being executed. Ex: If selected Personal Services as the Umbrella Contract Type and will be entering into a Grant Agreement, change this field to "Grants" to more specifically identify the type of Personal Services contract. If the subcategory selected is "Master Task Order" make sure to read the Help text for both "Maximum Contract Amount of the Original contract," and CUMULATIVE Maximum Contract Dollar Amount.
Is this an IT contract?	All IT contracts must be identified for OIT search and oversight.
Maximum Amount	REMEMBER - The dollar amounts entered must relate to the specific record you are working in. Ex: If entering a Master Task Order Agreement then enter the MAXIMUM dollar amount payable under this contract at time of signing - generally this is the "Not to Exceed" amount. This field will not change unless the record is for a Master Task Order. Only for a Master Task Order record would this field potentially change if funds are added to increase the "cap" amount that all Task Orders combined cannot exceed.
CUMULATIVE Maximum Contract Dollar Amount (For Master Task Orders read Help text for instruction)	When adding money to the original contract, this field is modified. Dollars entered will reflect the original contract amount PLUS any/all modifications adding money. Ex: Maximum Contract Amount of the Original contract = $100,000 then amend the contract to add an additional $100,000, enter $200,000 in this field. This field is also used for Master Task Order contracts to track the CUMULATIVE amount of all Individual Task Orders issued against the cap amount. Each time an Individual Task Order record is created that spends against the Maximum, this CUMULATIVE must change. This is why ONLY for Master Task Order records the Maximum Amount field could potentially change if funds are added to increase the overall "cap".
Solicitation Method Used	Select from drop down choices. Authorized by Statute can be used for either a Vendor specified in the law or a Law Specified Selection Method. If solicitation method used is not included in the list, select "OTHER" and complete the next field. If "OTHER" is selected, the next field MUST be completed. This is a reportable field - do not leave it blank.

If selected OTHER, enter the Method used	This field MUST be completed if "OTHER" is selected in the "Solicitation Method Used" field. "OTHER" could include: BVB - Best Value Bidding, RA - Reverse Auctions, CN - Competitive Negotiations, PAQR - Price Agreement Quote Requests , PPI = Public-Private Initiative, Court Ordered.	
Solicitation Number	Enter identifying number on solicitation. Ex: DAA-RFP-JC10-001 or HAA DQ 10-150 SW or KAA-20100650-P	
If this is a Sole Source, was a "Sole Source Justification and Certification" form completed, and placed in contract file, that includes the mandatory determination steps?	Completion of the "State of Colorado Sole Source Justification" form is required to proceed with a Sole Source solicitation. This is a reportable field. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms." The completed form should be scanned and attached to the contract record.	
Sole Source Justification	Select one of the 5 options in the drop down list. If "OTHER" is selected, complete the next field. Start the "No" response with "Sole Source Justification: ___"	
If selected OTHER, enter the justification for the Source.	This field MUST be completed if "OTHER" is selected in the "Sole source Justification" field. Entry should reflect what is on the actual Sole source Justification and Certification form. Start the "No" response with "Sole Source Justification: ___"	
Select ALL steps taken in making the Sole Source determination	Statute requires identification of all steps taken towards making the determination that the vendor is the only available source. At least one of the 3 options must have been taken and selected. See Section 1.5 of the Sole Source Justification form. To select more than one from this list, hold the Ctrl key while clicking on each selection.	
Is this a Statutory Violation?	Select "Yes" if Vendor/Contractor began work, or the State made payments, prior to the Effective date of the Original (first contract term) contract.	
Is this a High Risk or Low Risk Contract?	This is an OPTIONAL field. Refer to OSC Policy "Automatic High and Low Risk Contracts" for assistance in making this determination. Policies available on OSC website.	
Are Services ANTICIPATED to occur outside of Colorado?	This information should be part of the vendor's solicitation response AND specified in the contract Statement of Work (SOW).	
Are Services ANTICIPATED to occur outside of the United States?	This information should be part of the vendor's solicitation response AND specified in the contract Statement of Work (SOW).	
Is the Contractor/Vendor performing work previously performed by State Employee(s)?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (1)	
How many positions (FTE) is the Contractor/Vendor filling that were previously performed by State Employees?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (2)	
For work previously performed by State Employees, how long did the Contractor perform the work? (# of months)	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (3)	
How many positions were ELIMINATED by the Contractor/Vendor performing this Work?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (4)	
Number of State Jobs Created	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (5)	
Duration of State Jobs Created	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (6)	
What Quality Improvements did the State gain by having Contractor/Vendor do the Work previously performed by State Employees?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (7)	
What Dollar ($) Savings did the State gain by having Contractor/Vendor do the Work previously performed by State Employees?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (8)	
Percentage of work ACTUALLY performed outside of Colorado.	This may or may not be the same as what was anticipated in the vendor's solicitation response. For Master Task Order contracts, the vendor must provide a total percentage representing work performed under ALL individual task orders issued under the Master Contract. This field is populated at the completion of the Master Contract term.	
Percentage of work ACTUALLY performed outside of the United States.	This may or may not be the same as what was anticipated in the vendor's solicitation response. For Master Task Order contracts, the vendor must provide a total percentage representing work performed under ALL individual task orders issued under the Master Contract. This field is populated at the completion of the Master Contract term.	
Program Manager	Select the name of the person within the department that will lead the project described in the contract. This is the individual who will have direct access to the vendor's work and/or work product and be able to evaluate and rate the vendor's performance.	
Has this contract been Certified as including: Performance Measures and Standards, Methods for Resolution, and Types of Monitoring Processes?	Statute requires an affirmative determination that the contract includes Performance Measures and Standards AND Methods for Resolution of Noncompliance AND Types of Monitoring Processes before contract is finalized. Selecting "Yes" in this field certifies (affirms) the contract does contain all of these provisions. OSC has made a Certification form available for use in support of this electronic certification ("Performance Measures and Standards Certification - Original Contract"). If used, the form should be made part of the contract file, scanned and attached to the contract record. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."	
If this contract has been renewed/extended, has the contractor's previous work been certified (affirmed) as complying with the terms of the contract?	Statute requires "recertification" every 12-months that the vendor has performed per the contract. This may or may not align with renewal of the contract. OSC has made an "Annual Certification" form available for use in support of this electronic certification ("CMS Annual Certification"). If used, the form should be made part of the contract file, scanned and attached to the contract record. Ex: A contract with an initial term of 3 years (5/1/2010 through 4/30/2013) with options to renew for 2 additional 1-year periods will have to certify on 4/1/2011 before work can continue, on 4/30/2012 before work can continue and on 4/30/2013 if the contract is extended. For contracts entered into with an initial term of 1-year, the certification process should occur prior to extension for each additional term. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."	
If applicable, enter date of MOST RECENT annual certification of contractor's work.	At the end of each contract period, certification of the vendor's compliance with the terms of the contract, must occur. This date will change if/when the vendor's work is certified over the lifetime of the contract. If extending a contract, the field in the Modification record must also be completed.	
	REMEMBER - Keep in mind the record you are entering/updating. If you are entering data into a Master or Original/Underlying Contract then this field is for use in reporting	

Final Contractor/Vendor Rating (no renewal periods remain)	the FINAL rating assigned a vendor after all renewals/extensions of the contract. Individual Task Order evaluations/ratings will "add up" for use in assigning a FINAL rating at the end of the entire Master Contract term. If the vendor was evaluated quarterly, yearly etc., those interim ratings can be recorded in the NOTES fields and the FINAL rating added to this field at the END of the full contract. If you are entering data into an Individual Task Order record then this field is OPTIONAL and not published onto the public website but rather becomes part of the information used at the end of the entire Master Contract term. The FINAL ratings entered into a Master or Original/Underlying Contract record, should be reflective of performance over the life of the contract using the following ratings: 1=Below Standard: Contractor's performance under the contract has failed to meet all specifications/requirements of the contract. Support documentation is required for this rating and should be scanned and attached to the contract record. 2=Standard: Contractor's performance under the contract has met all specifications/requirements of the contract. 3=Above Standard: Contractor's performance under the contract has exceeded specifications/requirements of the contract. Support documentation is required for this rating and should be scanned and attached to the contract record. The final rating could be a compilation of interim ratings throughout the term of the contract. Ex: If over a five year contract the vendor was rated as: Year-1 = Standard (2), Year-2 = Standard (2), Year-3 = Above Standard (3), Year-4 = Above Standard, Year-5 = Standard (2) then the Final Rating would be: (2+2+3+3+2)/5 or 2.4 = Standard. Supporting documentation to this should appear in the contract file. This is a Reportable Field.	
When was the Rating sent to the Contractor/Vendor?	REMEMBER - Keep in mind the record you are entering/updating. Vendor must be notified immediately upon FINAL Rating as this is the value that will be shown on the public website, and the vendor needs to be given time to submit comment before the public posting. Posting will occur within 30-days of contract completion. Interim ratings that are recorded in Notes Fields will not go public. Only what is placed in the "Final Contractor/Vendor Rating" field in the Master or Original/Underlying Contract record will post publically. If the vendor is being sent a rating for the Individual Task Order, it should be sent in a timely manner in order to record performance prior to issuance of subsequent task orders and/or to make an annual performance certification determination. Information entered into an Individual Task Order record will not post onto the public website.	
Did the Contractor/Vendor submit responses to its Evaluation?	REMEMBER - Keep in mind the record you are entering/updating. If you are entering data into a Master or Original/Underlying Contract record and if the Contractor submitted responses to its FINAL rating and evaluation, a copy should be attached to the contract record and copied into the Vendor Comments Field for transfer to the public website. Any interim ratings and evaluations shared with the vendor to which the vendor also responded can also be attached but are not recorded in this field. If you are entering data into an Individual Task Order record, and the vendor is sent a rating for the Individual Task Order, it should be sent in a timely manner in order to record performance prior to issuance of subsequent task orders and/or to make a recertification determination. Information entered into an Individual Task Order record will not post onto the public website.	
Did the Contractor/Vendor submit Comments as to the State's performance under the Contract?	If the Vendor commented on how the State's employees performed during the term of the contract, a copy should be included in the contract record - in the paper file and/or attached in CMS.	
Did the Contractor/Vendor DISPUTE the Evaluation?	Disputing an evaluation is different from submitting comments. Disputes are a formal process requiring the vendor to complete the form entitled "Contractor's Statement of Rebuttal to Performance Evaluation." If "Yes" selected, a copy should be included in the contract record - in the paper file and attached to the CMS record, AND a note must be made in the Contractor/Vendor Comments field stating: "On MM/DD/YYYY the Vendor submitted a rebuttal statement." The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."	
Contractor/Vendor Comments/Responses	REMEMBER - Keep in mind the record you are entering/updating. If you are entering data into a Master or Original/Underlying Contract record and if the Contractor submitted responses to its FINAL rating and evaluation, such comments must be entered here. If the vendor submitted comments electronically, simply cut and paste. If the vendor submitted hardcopy, enter EXACTLY what was written by the vendor. This field will show on the public website - check spelling and wording for accuracy. If you are entering data into an Individual Task Order record these will not post onto the public website.	
Budget Amount	The Budget field is an OPTIONAL field that must be populated by the Contract Administrator if the CMS Financials functionality is being used to track invoices or individual task order spend against the Maximum or "Not to exceed" amount of the contract. The Budget field will equal the "CUMULATIVE Maximum Contract Dollar Amount" field. In the case of Master Task Order Contracts, the Budget field will equal the "Maximum Amount" field.	
Notes	This Notes field should be kept as brief as possible. The field is free form.	
Custom Field 1	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.	
Custom Field 2	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.	
Custom Field 3	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.	
Entered By	Field will auto populate with name of person creating the initial contract record. Cannot be changed.	
Entered on Date	Field will auto populate with the date the contract record was originally created. Cannot be changed.	
Updated By	This field will auto populate each time a contract record is modified. Cannot be changed.	
Updated on Date	This field will auto populate each time a contract record is modified. Cannot be changed.	

REAL PROPERTY - UMBRELLA CONTRACT TYPE	
FINAL FIELD LABELS	**Help Screen Text**
CMS Identification #	Field is automatically generated in sequential order of contract record entry. Does not number within a Department but Statewide across all departments.
Contract Title	Enter a short name for the project defined in the contract. Ex: Financial Advisory Services.
Contract Purpose	Enter a short description of the work the vendor is being hired to perform.
Fiscal Year	This is an OPTIONAL Field. Type in 4 digit year reflective of the fiscal year contract performance will begin.
Contractor/Vendor	Select the Name of the Vendor. If the vendor needed is not listed, complete a New Vendor Request form and submit to the OIT Service Desk. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
FEIN	Field will display only last 4 digits of FEIN for security purposes. Field will populate once record is saved. Verify that the FEIN belongs to the vendor selected.
Contract Administrator	Will default to person entering the contract record. Change this if another employee will be responsible for updates to the contract record. Change the contract administrator last since once changed only that person can make further edits.
Unique Department Contract Number	This field is OPTIONAL. Use if the Department has a unique numbering convention.
Original Contract CLIN or other Identifying Number	This is an OPTIONAL Field. If your contract preceded July 1, 2009 and has some type of identifying contract routing number associated with it (e.g. CLIN number or Department Contract Number), enter that number in this field. If entering a Modification, enter the CMS number of the contract being modified.
Purchase Order or Encumbrance Number	This is an OPTIONAL Field. Enter the alpha-numeric PO# or other Encumbrance number. Ex: SC EGB C0800022-10
Agency/IHE (Department) Name	Field will default to the department of the person entering the contract record.
Agency/IHE (Department) Code	Select the matching department code of the person entering the contract record. Will match the 3 character COFRS Agency Code.
Effective Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the date that document is fully executed. Since this field must be populated for record creation, if contract is not yet fully executed, enter an estimated date. This field can be modified once final signature obtained but then does NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Expiration Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the expiration date of that document NOT including possible renewals/extensions. Ex: for a 1-year contract effective June 1, 2009, the End Date will be May 31, 2010. This field will NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Performance Period Start Date	REMEMBER - Dates entered must relate to the specific record you are working in. In most cases, this entry will equal the Effective Date field for the first term of the contract when original performance begins. This date reflects when the contract performance begins. This date does NOT change if/when a mod to extend the End Date (or renew the contract period) is executed.
LATEST Performance Period End Date	REMEMBER - The dates entered must relate to the specific record you are working in. In most cases, this entry will be the same as the Expiration Date field for the first term of the contract when original performance begins. This date WILL CHANGE when new contract term begins. Ex: Effective Date of Original Contract was 05/10/2010 and Expiration Date of the Original Contract was 04/30/2011, and renewing for another 1 year term, then this LATEST date will change from 04/30/2011 to 04/30/2012. This is the date on which the Notify Days field bases the alerts.
Number of renewal periods	This is a reportable field. Select how many additional years the contract can be renewed if needed and able. Ex: If have a 1-year contract with Option to renew for 4 additional 1-year periods, select 4-years. If the contract is for 1-year with a holdover provision, then < 1-year would be selected.
Contract Group/Type	Entry will default initially to the selected Umbrella Contract Type. If a more specific subcategory applies, the next field should be changed to be reflective of the specific type of contract being executed.
Contract Sub-Type	Change this field if a more specific sub-category applies to the contract being executed. Ex: If selected Personal Services as the Umbrella Contract Type and will be entering into a Grant Agreement, change this field to "Grants" to more specifically identify the type of Personal Services contract. If the subcategory selected is "Master Task Order" make sure to read the Help text for both "Maximum Contract Amount of the Original contract," and CUMULATIVE Maximum Contract Dollar Amount.
Is this an IT contract? (20)	All IT contracts must be identified for OIT search and oversight.

Maximum Amount	REMEMBER - The dollar amounts entered must relate to the specific record you are working in. Ex: If entering a Master Task Order Agreement then enter the MAXIMUM dollar amount payable under this contract at time of signing - generally this is the "Not to Exceed" amount. This field will not change unless the record is for a Master Task Order. Only for a Master Task Order record would this field potentially change if funds are added to increase the "cap" amount that all Task Orders combined cannot exceed.
CUMULATIVE Maximum Contract Dollar Amount (For Master Task Orders read Help text for instruction)	When adding money to the original contract, this field is modified. Dollars entered will reflect the original contract amount PLUS any/all modifications adding money. Ex: Maximum Contract Amount of the Original contract = $100,000 then amend the contract to add an additional $100,000, enter $200,000 in this field. This field is also used for Master Task Order contracts to track the CUMULATIVE amount of all Individual Task Orders issued against the cap amount. Each time an Individual Task Order record is created that spends against the Maximum, this CUMULATIVE must change. This is why ONLY for Master Task Order records the Maximum Amount field could potentially change if funds are added to increase the overall "cap".
Is this a Statutory Violation?	Select "Yes" if Vendor/Contractor began work, or the State made payments, prior to the Effective date of the Original (first contract term) contract.
Is this a High Risk or Low Risk Contract?	This is an OPTIONAL field. Refer to OSC Policy "Automatic High and Low Risk Contracts" for assistance in making this determination. Policies available on OSC website.
Program Manager	Select the name of the person within the department that will lead the project described in the contract. This is the individual who will have direct access to the vendor's work and/or work product and be able to evaluate/rate the vendor's performance.
Lease Size	Enter the size of the property using NUMBERS only. Enter in square feet or acres or measurement being used in the contract/lease.
Size Type	Select the appropriate measurement unit (Acres or Square Feet).
Lease Expenses	This is an OPTIONAL Field. Before the end of the contract, enter summary of expenses incurred under the contract/lease. This information may chage as lease expenses are adjusted over the life of the lease agreement.
Budget Amount	The Budget field is an OPTIONAL field that must be populated by the Contract Administrator if the CMS Financials functionality is being used to track invoices or individual task order spend against the Maximum or “Not to exceed” amount of the contract. The Budget field will equal the "CUMULATIVE Maximum Contract Dollar Amount" field. In the case of Master Task Order Contracts, the Budget field will equal the "Maximum Amount" field.
Notes	This Notes field should be kept as brief as possible. The field is free form.
Custom Field 1	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 2	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 3	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Entered By	Field will auto populate with name of person creating the initial contract record. Cannot be changed.
Entered on Date	Field will auto populate with the date the contract record was originally created. Cannot be changed.
Updated By	This field will auto populate each time a contract record is modified. Cannot be changed.
Updated on Date	This field will auto populate each time a contract record is modified. Cannot be changed.

This Umbrella includes the following sub-contract types:
> Real Property
> Easement/ROW
> Lease
> Purchase
> Licenses
> COPS

PURCHASE ORDER (Services <$100K, Goods or Approved Exceptions) - UMBRELLA CONTRACT TYPE

No sub-contract Types

FINAL FIELD LABELS	Help Screen Text
CMS Identification #	Field is automatically generated in sequential order of contract record entry. Does not number within a Department but Statewide across all departments.
Contract Title	Enter a short name for the project defined in the contract. Ex: Financial Advisory Services.
Contract Purpose	Enter a short description of the work the vendor is being hired to perform.
Fiscal Year	This is an OPTIONAL Field. Type in 4 digit year reflective of the fiscal year contract performance will begin.
Contractor/Vendor	Select the Name of the Vendor. If the vendor needed is not listed, complete a New Vendor Request form and submit to the OIT Service Desk. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
FEIN	Field will display only last 4 digits of FEIN for security purposes. Field will populate once record is saved. Verify that the FEIN belongs to the vendor selected.
Contract Administrator	Will default to person entering the contract record. Change this if another employee will be responsible for updates to the contract record. Change the contract administrator last since once changed only that person can make further edits.
Unique Department Contract Number	This field is OPTIONAL. Use if the Department has a unique numbering convention.
Original Contract CLIN or other Identifying Number	This is an OPTIONAL Field. If your contract preceded July 1, 2009 and has some type of identifying contract routing number associated with it (e.g. CLIN number or Department Contract Number), enter that number in this field. If entering a Modification, enter the CMS number of the contract being modified.
Purchase Order or Encumbrance Number	This is an OPTIONAL Field. Enter the alpha-numeric PO# or other Encumbrance number. Ex: SC EGB C0800022-10
Agency/IHE (Department) Name	Field will default to the department of the person entering the contract record.
Agency/IHE (Department) Code	Select the matching department code of the person entering the contract record. Will match the 3 character COFRS Agency Code.
Effective Date	for record creation, if contract is not yet fully executed, enter an estimated date. This field can be modified once final signature obtained but then does NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Expiration Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the expiration date of that document NOT including possible renewals/extensions. Ex: for a 1-year contract effective June 1, 2009, the End Date will be May 31, 2010. This field will NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Performance Period Start Date	REMEMBER - Dates entered must relate to the specific record you are working in. In most cases, this entry will equal the Effective Date field for the first term of the contract when original performance begins. This date reflects when the contract performance begins. This date does NOT change if/when a mod to extend the End Date (or renew the contract period) is executed.
LATEST Performance Period End Date	REMEMBER - The dates entered must relate to the specific record you are working in. In most cases, this entry will be the same as the Expiration Date field for the first term of the contract when original performance begins. This date WILL CHANGE when new contract term begins. Ex: Effective Date of Original Contract was 05/10/2010 and Expiration Date of the Original Contract was 04/30/2011, and renewing for another 1 year term, then this LATEST date will change from 04/30/2011 to 04/30/2012. This is the date on which the Notify Days field bases the alerts.
Number of renewal periods	This is a reportable field. Select how many additional years the contract can be renewed if needed and able. Ex: If have a 1-year contract with Option to renew for 4 additional 1-year periods, select 4-years. If the contract is for 1-year with a holdover provision, then < 1-year would be selected.
Contract Group/Type	Entry will default initially to the selected Umbrella Contract Type. If a more specific subcategory applies, the next field should be changed to be reflective of the specific type of contract being executed.
Is this an IT contract?	All IT contracts must be identified for OIT search and oversight.
Maximum Amount	REMEMBER - The dollar amounts entered must relate to the specific record you are working in. Ex: If entering a Master Task Order Agreement then enter the MAXIMUM dollar amount payable under this contract at time of signing - generally this is the "Not to Exceed" amount. This field will not change unless the record is for a Master Task Order. Only for a Master Task Order record would this field potentially change if funds are added to increase the "cap" amount that all Task Orders combined cannot exceed.
CUMULATIVE Maximum Contract Dollar Amount (For Master Task Orders read Help text for instruction)	When adding money to the original contract, this field is modified. Dollars entered will reflect the original contract amount PLUS any/all modifications adding money. Ex: Maximum Contract Amount of the Original contract = $100,000 then amend the contract to add an additional $100,000, enter $200,000 in this field. This field is also used for Master Task Order contracts to track the CUMULATIVE amount of all Individual Task Orders issued against the cap amount. Each time an Individual Task Order record is created that spends against the Maximum, this CUMULATIVE must change. This is why ONLY for Master Task Order records the Maximum Amount field could potentially change if funds are added to increase the overall "cap".
Solicitation Method Used	Select from drop down choices. Authorized by Statute can be used for either a Vendor specified in the law or a Law Specified Selection Method. If solicitation method used is not included in the list, select "OTHER" and complete the next field. If "OTHER" is selected, the next field MUST be completed. This is a reportable field - do not leave it blank.
If selected OTHER, enter the Method used.	This field MUST be completed if "OTHER" is selected in the "Solicitation Method Used" field. "OTHER" could include: BVB - Best Value Bidding, RA - Reverse Auctions, CN - Competitive Negotiations, PAQR - Price Agreement Quote Requests , PPI = Public-Private Initiative, Court Ordered.
Solicitation Number	Enter identifying number on solicitation. Ex: DAA-RFP-JC10-001 or HAA DQ 10-150 SW or KAA-20100650-P
If this is a Sole Source, was a "Sole Source Justification and Certification" form completed, and placed in contract file, that includes the mandatory determination steps?	Completion of the "State of Colorado Sole Source Justification" form is required to proceed with a Sole Source solicitation. This is a reportable field. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms." The completed form should be scanned and attached to the contract record.
Sole Source Justification.	Select one of the 5 options in the drop down list. If Other is selected, complete the next field. Start the No entry with "Sole Source Justification: ___"

If selected OTHER, enter the justification for the Source.	This field MUST be completed if Other is selected in the "Sole source Justification" field. Entry should reflect what is on the actual Sole source Justification and Certification form. Start the No entry with "Sole Source Justification: ___"
Select ALL steps taken in making the Sole Source determination.	Statute requires identification of all steps taken towards making the determination that the vendor is the only available source. At least one of the 3 options must have been taken and selected. See Section 1.5 of the Sole Source Justification form. To select more than one from this list, hold the Ctrl key while clicking on each selection.
Is this a Statutory Violation?	Select YES if Vendor/Contractor began work, or the State made payments, prior to the Effective date of the Original (first contract term) contract.
Is this a High Risk or Low Risk Contract?	This is an OPTIONAL field. Refer to OSC Policy "Automatic High and Low Risk Contracts" for assistance in making this determination. Policies available on OSC website.
Are Services ANTICIPATED to occur outside of Colorado?	This information should be part of the vendor's solicitation response AND specified in the contract Statement of Work (SOW).
Are Services ANTICIPATED to occur outside of the United States?	This information should be part of the vendor's solicitation response AND specified in the contract Statement of Work (SOW).
Is the Contractor/Vendor performing work previously performed by State Employee(s)?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (1)
How many positions (FTE) is the Contractor/Vendor filling that were previously performed by State Employees?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (2)
For work previously performed by State Employees, how long did the Contractor perform the work? (# of months)	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (3)
How many positions were ELIMINATED by the Contractor/Vendor performing this Work?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (4)
Number of State Jobs Created	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (5)
Duration of State Jobs Created	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (6)
What Quality Improvements did the State gain by having Contractor/Vendor do the Work previously performed by State Employees?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (7)
What Dollar ($) Savings did the State gain by having Contractor/Vendor do the Work previously performed by State Employees?	The system will enter default answers into the 8 Human Resource question fields and the individual who creates/modifies a contract record (i.e. the Contract Administrator) will not need to change these unless specifically told otherwise by their internal HR delegate or DHR. (8)
Percentage of work ACTUALLY performed outside of Colorado.	This may or may not be the same as what was anticipated in the vendor's solicitation response. For Master Task Order contracts, the vendor must provide a total percentage representing work performed under ALL individual task orders issued under the Master
Percentage of work ACTUALLY performed outside of the United States.	This may or may not be the same as what was anticipated in the vendor's solicitation response. For Master Task Order contracts, the vendor must provide a total percentage representing work performed under ALL individual task orders issued under the Master
Program Manager	Select the name of the person within the department that will lead the project described in the contract. This is the individual who will have direct access to the vendor's work and/or work product and be able to evaluate and rate the vendor's performance.
Budget Amount	The Budget field is an OPTIONAL field that must be populated by the Contract Administrator if the CMS Financials functionality is being used to track invoices or individual task order spend against the Maximum or “Not to exceed” amount of the contract. The Budget field will equal the "CUMULATIVE Maximum Contract Dollar Amount" field. In the case of Master Task Order Contracts, the Budget field will equal the "Maximum Amount" field.
Notes	This Notes field should be kept as brief as possible. The field is free form.
Custom Field 1	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 2	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 3	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Entered By	Field will auto populate with name of person creating the initial contract record. Cannot be changed.
Entered on Date	Field will auto populate with the date the contract record was originally created. Cannot be changed.
Updated By	This field will auto populate each time a contract record is modified. Cannot be changed.
Updated on Date	This field will auto populate each time a contract record is modified. Cannot be changed.

Modification Umbrella Contract Type

No sub-contract Types

FINAL FIELD LABELS	Help Screen Text
CMS Identification #	Field is automatically generated in sequential order of contract record entry. Does not number within a Department but Statewide across all departments.
Contract Title	Enter a short name for the project defined in the contract. Ex: Financial Advisory Services.
Fiscal Year	This is an OPTIONAL Field. Type in 4 digit year reflective of the fiscal year contract performance will begin.
Contractor/Vendor	Select the Name of the Vendor. If the vendor needed is not listed, complete a New Vendor Request form and submit to the OIT Service Desk. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
FEIN	Field will display only last 4 digits of FEIN for security purposes. Field will populate once record is saved. Verify that the FEIN belongs to the vendor selected.
Contract Administrator	Will default to person entering the contract record. Change this if another employee will be responsible for updates to the contract record. Change the contract administrator last since once changed only that person can make further edits.
Agency/IHE (Department) Name	Field will default to the department of the person entering the contract record.
Agency/IHE (Department) Code	Select the matching department code of the person entering the contract record. Will match the 3 character COFRS Agency Code.
Unique Department Contract Number	This field is OPTIONAL. Use if the Department has a unique numbering convention.
Original Contract CLIN or other Identifying Number	This is an OPTIONAL Field. If your contract preceded July 1, 2009 and has some type of identifying contract routing number associated with it (e.g. CLIN number or Department Contract Number), enter that number in this field. If entering a Modification, enter the CMS number of the contract being modified.
Purchase Order or Encumbrance Number	This is an OPTIONAL Field. Enter the alpha-numeric PO# or other Encumbrance number. Ex: SC EGB C0800022-10
Contract Group/Type	Entry will default initially to the selected Umbrella Contract Type. If a more specific subcategory applies, the next field should be changed to be reflective of the specific type of contract being executed.
Document Status	Select where in the contract creation process the agreement is currently. For example, has the contract been fully signed? If so then select "Approved." Is the contract still being written? Then select Draft.
Effective Date	Enter the date the Modification was approved and/or signed (MM/DD/YYYY). If the modification is not yet fully executed, enter an estimated date. This field can be modified once final signature is obtained but then does NOT change.
Is this a Statutory Violation?	Select "Yes" if Vendor/Contractor began work, or the State made payments, prior to the Effective date of the Modification.
If this Modification is to renew/extend a contract, has the contractor's work to date been certified as complying with the terms of the contract AND the Master CMS contract record updated?	Original contract certification must be complete and on file prior to execution of a Modification for extensions/renewals and the certification for the extension/renewal must be complete and on file prior to extension. Certification must be recorded in the Master Record for the contract being modified. Statute requires "recertification" every 12-months that the vendor has performed per the contract. This may or may not align with renewal of the contract. OSC has made an "Annual Certification" form available for use in support of this electronic certification ("CMS Annual Certification"). If used, the form should be made part of the contract file. Ex: A contract with an initial term of 3 years (5/1/2010 through 4/30/2013) with options to renew for 2 additional 1-year periods will have to certify on 4/1/2011 before work can continue, on 4/30/2012 before work can continue and on 4/30/2013 if the contract is extended. For contracts entered into with an initial term of 1-year, the certification process should occur prior to extension for each additional term. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
If applicable, enter date of MOST RECENT annual certification of contractor's work.	At the end of each contract period, certification of the vendor's compliance with the terms of the contract, must occur. This date will change if/when the vendor's work is certified over the lifetime of the contract. If extending a contract, the field in the Modification record must also be completed.
Does this Modification CHANGE the DOLLAR amount of the Contract?	The change can be an increase OR a decrease.
If the Modification Adds or Subtracts money, what is the dollar amount of the change?	User must also change the dollar amount in the "CUMULATIVE Maximum Contract Dollar Amount" field in the Original Contract Record. If decreasing, enter the dollar value using a negative sign in front of the dollar amount. Ex: A $100,000.00 decrease would be entered as -100000.00 or -100000. No $ or commas.
Does this Modification change the length of the Contract?	The change can be to extend the time or reduce the time.
If the Modification changes the length of the Contract, what is the new Performance End Date?	User must also enter this new Performance Period End Date in the Original Contract Record field "LATEST Performance Period End Date."
If the Modification is not for money or time, describe the purpose for the modification.	If the Modification is changing the Scope of Work or updating anything other than time or money, enter a brief description.
Notes	This Notes field should be kept as brief as possible. The field is free form.
Custom Field 1	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 2	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 3	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Entered By	Field will auto populate with name of person creating the initial contract record. Cannot be changed.
Entered on Date	Field will auto populate with the date the contract record was originally created. Cannot be changed.
Updated By	This field will auto populate each time a contract record is modified. Cannot be changed.
Updated on Date	This field will auto populate each time a contract record is modified. Cannot be changed.

Exempt Umbrella Contract Type	
FINAL FIELD LABELS	**Help Screen Text**
CMS Identification #	Field is automatically generated in sequential order of contract record entry. Does not number within a Department but Statewide across all departments.
Contract Title	Enter a short name for the project defined in the contract. Ex: Financial Advisory Services.
Contract Purpose	Enter a short description of the work the vendor is being hired to perform.
Fiscal Year	This is an OPTIONAL Field. Type in 4 digit year reflective of the fiscal year contract performance will begin.
Contractor/Vendor	Select the Name of the Vendor. If the vendor needed is not listed, complete a New Vendor Request form and submit to the OIT Service Desk. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
FEIN	Field will display only last 4 digits of FEIN for security purposes. Field will populate once record is saved. Verify that the FEIN belongs to the vendor selected.
Second Contractor/Vendor	Select the Name of the Second Vendor. For an Interagency Agreement, enter the name of the RECEIVING Agency. The list of vendors was imported from COFRS or added post May 2009. If the vendor needed is not listed, complete a New Vendor Request form and submit to the OIT Service Desk. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms."
Second Contractor/Vendor FEIN	Field will display only last 4 digits of FEIN for security purposes. Field will populate once record is saved. Verify that the FEIN belongs to the vendor selected.
Third Contractor/Vendor	Select the Name of the Third Vendor. For an Interagency Agreement, enter the name of the RECEIVING Agency. The list of vendors was imported from COFRS or added post May 2009. If the vendor needed is not listed, complete a New Vendor Request form and submit to the OIT Service Desk. Form is available on the OSC website.
Third Contractor/Vendor FEIN	Field will display only last 4 digits of FEIN for security purposes. Field will populate once record is saved. Verify that the FEIN belongs to the vendor selected.
Contract Administrator	Will default to person entering the contract record. Change this if another employee will be responsible for updates to the contract record. Change the contract administrator last since once changed only that person can make further edits.
Unique Department Contract Number	This field is OPTIONAL. Use if the Department has a unique numbering convention.
Original Contract CLIN or other Identifying Number	This is an OPTIONAL Field. If your contract preceded July 1, 2009 and has some type of identifying contract routing number associated with it (e.g. CLIN number or Department Contract Number), enter that number in this field. If entering a Modification, enter the CMS number of the contract being modified.
Purchase Order or Encumbrance Number	This is an OPTIONAL Field. Enter the alpha-numeric PO# or other Encumbrance number. Ex: SC EGB C0800022-10
Agency/IHE (Department) Name	Field will default to the department of the person entering the contract record.
Agency/IHE (Department) Code	Select the matching department code of the person entering the contract record. Will match the 3 character COFRS Agency Code.
Second Agency/IHE (Department) Name	Select the Name of the Second Agency to the Contract. For an Interagency Agreement, enter the name of the PAYING Agency.
Third Agency/IHE (Department) Name	Select the Name of the Third Agency to the Contract. For an Interagency Agreement, enter the name of the PAYING Agency.
Document Status	Select where in the contract creation process the agreement is currently. For example, has the contract been fully signed? If so then select "Approved." Is the contract still being written? Then select Draft.
Effective Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the date that document is fully executed. Since this field must be populated for record creation, if contract is not yet fully executed, enter an estimated date. This field can be modified once final signature obtained but then does NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Expiration Date	REMEMBER - The dates entered relate to the specific record you are working in. Ex: If the record is a Master Task Order Agreement then enter the expiration date of that document NOT including possible renewals/extensions. Ex: for a 1-year contract effective June 1, 2009, the End Date will be May 31, 2010. This field will NOT change. Do not use this contract type for Individual Task Order's - they have their own seperate contract record type that then is linked to the Master.
Performance Period Start Date	REMEMBER - Dates entered must relate to the specific record you are working in. In most cases, this entry will equal the Effective Date field for the first term of the contract when original performance begins. This date reflects when the contract performance begins. This date does NOT change if/when a mod to extend the End Date (or renew the contract period) is executed.
LATEST Performance Period End Date	REMEMBER - The dates entered must relate to the specific record you are working in. In most cases, this entry will be the same as the Expiration Date field for the first term of the contract when original performance begins. This date WILL CHANGE when new contract term begins. Ex: Effective Date of Original Contract was 05/10/2010 and Expiration Date of the Original Contract was 04/30/2011, and renewing for another 1 year term, then this LATEST date will change from 04/30/2011 to 04/30/2012. This is the date on which the Notify Days field bases the alerts.
Number of renewal periods	This is a reportable field. Select how many additional years the contract can be renewed if needed and able. Ex: If have a 1-year contract with Option to renew for 4 additional 1-year periods, select 4-years. If the contract is for 1-year with a holdover provision, then < 1-year would be selected.
Contract Group/Type	Entry will default initially to the selected Umbrella Contract Type. If a more specific subcategory applies, the next field should be changed to be reflective of the specific type of contract being executed.
Contract Sub-Type	Change this field if a more specific sub-category applies to the contract being executed. Ex: If selected Personal Services as the Umbrella Contract Type and will be entering into a Grant Agreement, change this field to "Grants" to more specifically identify the type of Personal Services contract. If the subcategory selected is "Master Task Order" make sure to read the Help text for both "Maximum Contract Amount of the Original contract," and CUMULATIVE Maximum Contract Dollar Amount.
Is this an IT contract?	All IT contracts must be identified for OIT search and oversight.
Maximum Amount	REMEMBER - The dollar amounts entered must relate to the specific record you are working in. Ex: If entering a Master Task Order Agreement then enter the MAXIMUM dollar amount payable under this contract at time of signing - generally this is the "Not to Exceed" amount. This field will not change unless the record is for a Master Task Order. Only for a Master Task Order record would this field potentially change if funds are added to increase the "cap" amount that all Task Orders combined cannot exceed.
CUMULATIVE Maximum Contract Dollar Amount (For Master Task Orders read Help text for instruction)	When adding money to the original contract, this field is modified. Dollars entered will reflect the original contract amount PLUS any/all modifications adding money. Ex: Maximum Contract Amount of the Original contract = $100,000 then amend the contract to add an additional $100,000, enter $200,000 in this field. This field is also used for Master Task Order contracts to track the CUMULATIVE amount of all Individual Task Orders issued against the cap amount. Each time an Individual Task Order record is created that spends against the Maximum, this CUMULATIVE must change. This is why ONLY for Master Task Order records the Maximum Amount field could potentially change if funds are added to increase the overall "cap".

Solicitation Method Used	Select from drop down choices. Authorized by Statute can be used for either a Vendor specified in the law or a Law Specified Selection Method. If solicitation method used is not included in the list, select "OTHER" and complete the next field. If "OTHER" is selected, the next field MUST be completed. This is a reportable field - do not leave it blank.
If selected OTHER, enter the Method used	This field MUST be completed if "OTHER" is selected in the "Solicitation Method Used" field. "OTHER" could include: BVB - Best Value Bidding, RA - Reverse Auctions, CN - Competitive Negotiations, PAQR - Price Agreement Quote Requests , PPI = Public-Private Initiative, Court Ordered.
Solicitation Number	Enter identifying number on solicitation. Ex: DAA-RFP-JC10-001 or HAA DQ 10-150 SW or KAA-20100650-P
If this is a Sole Source, was a “Sole Source Justification and Certification” form completed, and placed in contract file, that includes the mandatory determination steps?	Completion of the "State of Colorado Sole Source Justification" form is required to proceed with a Sole Source solicitation. This is a reportable field. The form can be obtained through the OSC website, Contract Administration pages under "Current Processes and Forms." The completed form should be scanned and attached to the contract record.
Sole Source Justification	Select one of the 5 options in the drop down list. If Other is selected, complete the next field. Start the No entry with "Sole Source Justification: ___"
If selected OTHER, enter the justification for the Source.	This field MUST be completed if Other is selected in the "Sole source Justification" field. Entry should reflect what is on the actual Sole source Justification and Certification form. Start the No entry with "Sole Source Justification: ___"
Select ALL steps taken in making the Sole Source determination	Statute requires identification of all steps taken towards making the determination that the vendor is the only available source. At least one of the 3 options must have been taken and selected. See Section 1.5 of the Sole Source Justification form. To select more than one from this list, hold the Ctrl key while clicking on each selection.
Is this a Statutory Violation?	Select "Yes" if Vendor/Contractor began work, or the State made payments, prior to the Effective date of the Original (first contract term) contract.
Is this a High Risk or Low Risk Contract?	This is an OPTIONAL field. Refer to OSC Policy "Automatic High and Low Risk Contracts" for assistance in making this determination. Policies available on OSC website.
Program Manager	Select the name of the person within the department that will lead the project described in the contract. This is the individual who will have direct access to the vendor's work and/or work product and be able to evaluate and rate the vendor's performance.
Budget Amount	The Budget field is an OPTIONAL field that must be populated by the Contract Administrator if the CMS Financials functionality is being used to track invoices or individual task order spend against the Maximum or “Not to exceed” amount of the contract. The Budget field will equal the "CUMULATIVE Maximum Contract Dollar Amount" field. In the case of Master Task Order Contracts, the Budget field will equal the "Maximum Amount" field.
Notes	This Notes field should be kept as brief as possible. The field is free form.
Custom Field 1	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 2	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Custom Field 3	Custom Fields included for use as desired by each department. The fields can, for example, be used to track contract information of interest or to record internal contract requirements, etc. The field is free form up to 250 characters.
Entered By	Field will auto populate with name of person creating the initial contract record. Cannot be changed.
Entered on Date	Field will auto populate with the date the contract record was originally created. Cannot be changed.
Updated By	This field will auto populate each time a contract record is modified. Cannot be changed.
Updated on Date	This field will auto populate each time a contract record is modified. Cannot be changed.

This Umbrella includes the following sub-contract types:
> Personal Services
> Grants
> Intellectual Property
> Master Task Orders
> Outsource Agreements
> Purchase Orders (>$100,000)
> Price Agreements
> Professional Services

Field Label
Contract ID
Task Name
Employee
Approved on Date
Task Complete
Status
Start Date
End Date
Notify Days
Task Creator Notes (Task Details)
Tasked Party Notes
Escalate To
Escalate After (Days)
Alternate Email
Contractor/Vendor Rating
Entered By
Entered On Date
Updated By
Order Number
Updated On Date
Amount
Role or Group
Type
Task ID

TASK FIELDS

Help Screen Text
This Field will auto-populate with the CMS Identification # assigned at creation of the contract record. This acts to identify the specific contract the Task is associated with.
This is the name of the specific task/action that needs to be completed/done. Ex: A Task Name of "Encumbrance Document Alert," means that the contract needs to have an Encumbrance Document completed and part of the hard copy file.
The name in this field is the employee being assigned the Task. This field will default to the person creating the task (contract administrator) and will need to be re-assigned if someone else needs to complete the task. Ex: If the task is a final vendor evaluation, then the name of the project manager would be entered.
If the task is one requiring the assigned (tasked party) employee to give an approval, enter the date approved, otherwise leave blank.
If the Task is done/complete, the assigned employee(tasked party) will select "True" (meaning Yes) from the drop-down options. This field must be set to "True" AND the Status field set to "Task Complete" in order for the task to be closed within the system. NOTE: Selecting "True" will automatically change the "Status" field to "Task Complete." If you do not wish the task to be closed, manually change the "Status" back to "Open."
This Field allows the assigned employee (tasked party) to choose the status that best describes where in the completion process the Task is. Ex: If the assigned employee is in the process of reviewing the Vendor Report, then they would select "Open" from the drop-down options. This field must be set to "Task Complete" AND the "Task Complete" field (above) set to "True" in order for the task to be closed within the system.
This Field is intended to hold the date a Task is to be started. Ex: A "Report Review" Task with a Start Date of July 1, 2011, would indicate that the assigned employee should begin reviewing the vendors report no later than July 1, 2011. This Field may not apply but an entry is required. This task will appear on the Tasked Party's calendar on this date as a reminder to Start the task.
This Field is intended to hold the date a Task should be Completed. Ex: A "Report Review" Task with an End Date of July 15, 2009, would indicate that the assigned employee should Complete review of the vendors report no later than July 15, 2009. This date will appear on the Tasked Party's calendar.
The number of days in this field tells the system when to notify the Tasked Party that completion of the Task is due. Ex: If this Task appeared on the employee's calendar on June 15, 2011 for a Report Review with an End Date of July 15, 2011, then the number of days in this field was set to 30. The employee will be notified 30 days before the End Date of the Task. The default for this field is 60.
This Field is for the person assigning the Task to make notes relating to the Task. This field could contain specific details about the task. Ex: A request for the Tasked Party to scan and email the insurance certificate to the contract administrator. This instruction will appear in the system generated email notification.
This field is for the person assigned the Task (Tasked Party) to make notes related to the task they were asked to perform. Ex: If contract signature is required of a Controller and the documents were incomplete, they would enter there notes in this field as to why not signing the contract. This information will NOT appear in the system generated email notification.
The Name(s) in this Field indicate who will be alerted if the Task is not completed by the End Date. This Field may or may not be used depending upon the specific Task.
The number of days past the "End Date" allowed before the system will send an Escalation Alert to the persons listed in the "Escalate To" field. Ex: For an End Date of July 1, 2011, if the Escalate After Field has been set for 5 Days, the Task will be escalated on July 6, 2011.
Use this field to enter an email address of a non-CMS user such as a vendor. This will act to send an email copy of the task. This field could also
This field will only be used if the Task relates to vendor performance, evaluation and rating (both interim and final).
This Field will auto-populate with the name of the person assigning the Task. This will generally be the Department's contract writer(s)/administrator(s).
This Field will auto-populate with the date the person assigning the Task, created the task.
This field will auto-populate with the name of the person updating the Task.
Used only for pre-defined tasks. Most often will be left blank.
This field will auto-populate with the date the Task information was changed (updated).
Depending upon the Task, this Field would be filled out. Ex: For an Encumbrance Document Alert, once the document is created, the dollar amount of the encumbrance would be entered here by the Tasked Party.
This Field will not be used.
This Field will not be used.
Field is automatically generated in sequential order of task creation/entry. Does not number within a Department but Statewide across all departments as with CMS ID# for the record itself.