

# Contract Management System Processes and Procedures

Follow these instructions to add a vendor to the system.

1. Gather the vendor information and enter in the table below.
  - a. **Bold type** denotes a required field.
  - b. Include other information if available.
  - c. Do NOT request Social Security Numbers be added to the system. If a vendor uses their Social Security Number as their FEIN, insert “SSN” in the FEIN field.

## NEW Vendor Information

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

2. For immediate assistance:
  - a. Call the OIT Service Desk at 303-239-4357 (HELP), Option 4. This number is staffed 24 hours a day, 7 days a week.
  - b. An OIT staff member will check if the vendor already exists within the system.
  - c. If yes, check the information in the system against the new information. If there is no discrepancy, no further action is required. If there is a discrepancy, determine which information governs and complete a Vendor Update.
  - d. If the vendor is not already in the system, the Service Desk member will add the vendor while you hold.
  - e. Refresh the vendor drop down list within the contract record by going to the Home screen, then the Contracts Menu, and select Add a Contract.
3. For non-urgent requests:
  - a. Email the completed Vendor Request Form (a separate pdf-fillable form) to OIT\_ServiceDesk\_HQ@state.co.us.
  - b. Requests sent via email will typically be completed within 24-hours.

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

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

The fields in **BOLD** must be provided on the VRF. These fields are the *minimum* information needed as part of a vendor record, although the remaining information should be available to the requester at the time they submit the VRF. Please gather and submit as much of the information as possible requested on the VFR to create a complete record.

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

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

PLEASE NOTE that a CMS VFR does not replace the Vendor/Customer related processes required by CORE. Requester’s will continue to follow the process established by their own Agency/IHE for adding new vendors to CORE or any other financial tracking system they employ. The addition of a vendor to CMS is a separate process tied specifically to the tracking and management of a contractual agreement with the vendor as mandated by law. For this reason, the required information does not include “remit” addresses or any other alternate mailing address and contact information.