Managing Your Agiloft Accounts and Company Profile

For DCHS Contracted Providers

Last Updated: 8/1/2024

Accessing Agiloft

- https://kingcountydchs.agiloft.com/gui2/samlssologin.jsp?project=King+County+DCHS
  - Bookmark the URL for easy access
  - Follow the instructions in the welcome email to log in the first time

- There are no Agiloft-specific passwords
  - Uses the password and authentication process of the email associated with the account

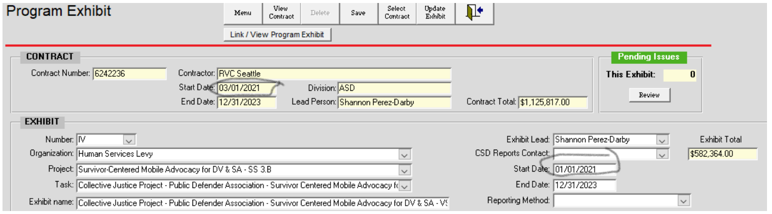
What is Agiloft? How is DCHS using it?

- Agiloft is a modern contract lifecycle management software used by hundreds of companies around the world.
- DCHS is using Agiloft to manage the hundreds of community grants we make every year. This includes activities related to:
  - Solicitation Events
  - Contracting Process
  - Invoice Processing

Agiloft is replacing several data systems DCHS currently uses to manage contracts and invoices

SILOED UNSUPPORTED SYSTEMS → SINGLE MODERN CONFIGURABLE SYSTEM

Contract Management System (CMS)
Customized Access System for routing and tracking non-BHRD contracts



ZoomGrants
Subscription-based Online Solicitation Management System; also used for invoicing by some teams

Chemical Dependency Contract Tracking (CDCT) & Invoice Processing (CDIP)
Customized PowerBuilder System for BHRD Contract and Invoice Management

How will DCHS-contracted providers use Agiloft?

MANAGE STAFF ACCOUNTS AND ACCESS

MAINTAIN COMPANY PROFILE, INCLUDING LOCATIONS

UPLOAD COMPANY-RELATED DOCUMENTS AND REPORTS

ACCESS ACTIVE CONTRACTS AND RELATED DOCUMENTS

SUBMIT AND TRACK INVOICES AND SUPPORTING DOCUMENTATION

PHASED ROLL OUT BY DIVISION IN 2024

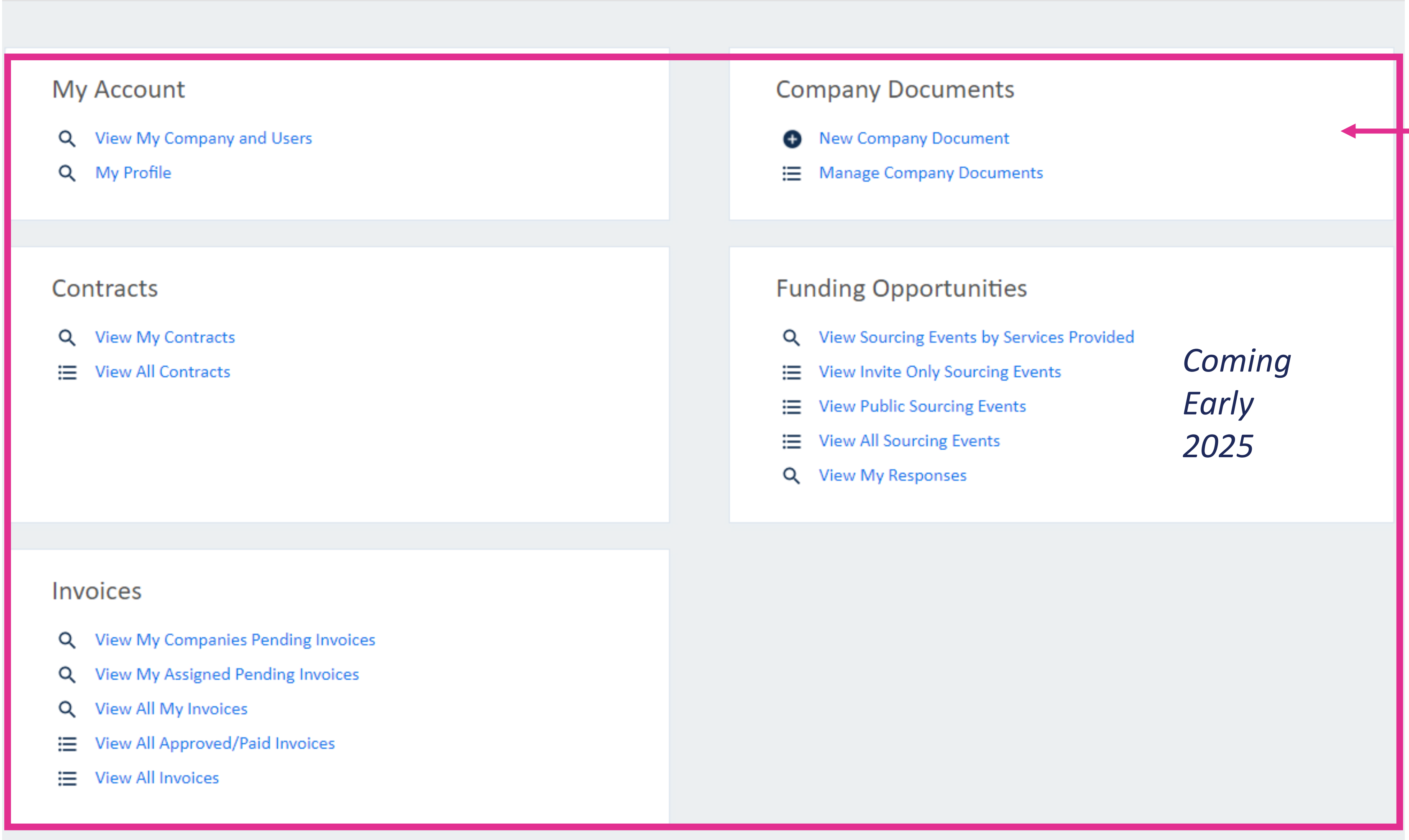
SEARCH AND APPLY FOR FUNDING (SOLICITATIONS)

COMING EARLY 2025

Agiloft Terminology, Wayfinding, and Troubleshooting

Agiloft End User Portal Home Screen

Click the DCHS logo to go back to the home screen



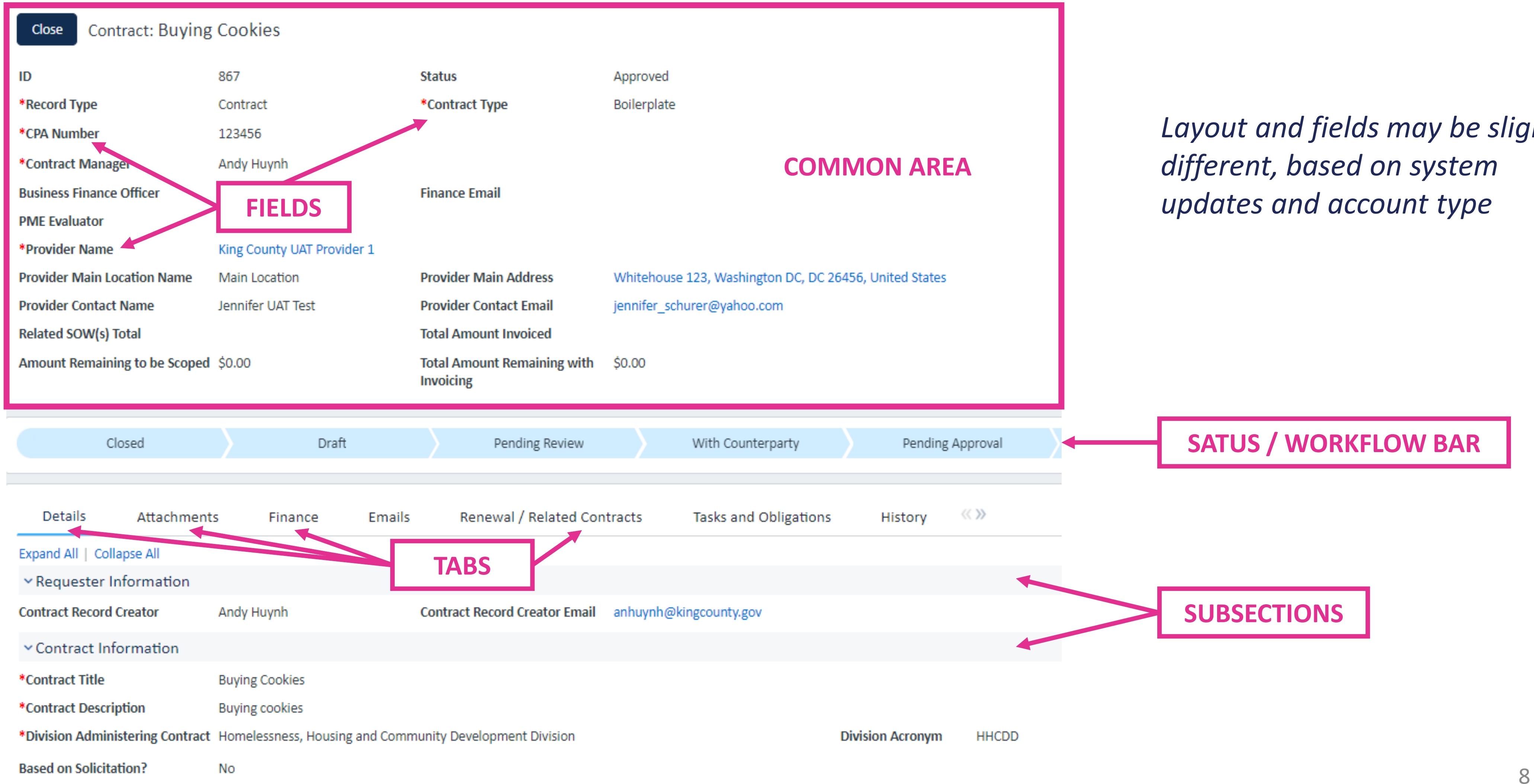
Tiles

Sections containing a cluster of links to perform various tasks related to the tile's topic.

Visibility and functionality depends on account type.

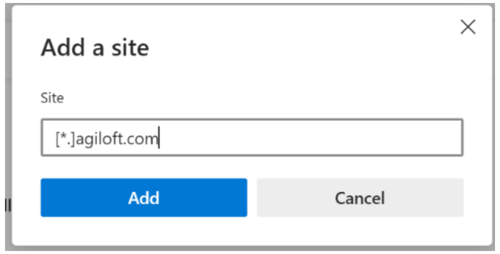
Anatomy of a record in Agiloft

Layout and fields may be slightly different, based on system updates and account type



Enable popups for full Agiloft functionality

1. Open a new browser window
2. In the address bar, enter the following address:
   - CHROME: chrome://settings/content/popups
   - EDGE: edge://settings/content/popups
3. Click the “Add” button next to the grouping that says:
   - CHROME: “Allowed to send pop-ups and use redirects”
   - EDGE: “Allow”
4. In the window type the following: [*.]agiloft.com
   - CHROM: then click Save
   - EDGE: then click Add
5. Close the browser, and reopen. Your changes should now be active.



Make ContractingWithDCHS@KingCounty.gov a Safe Email

- **All** emails directly from the system will come from contractingwithdchs@kingcounty.gov

- Add this email address to safe emails to make sure you're receiving system notifications and other communications
  - Don't let these emails being marked as spam or junk

Managing Staff Accounts and Access

Agiloft accounts are associated with a company profile

- A company (aka provider) profile must have a unique Tax ID Number (TIN/EIN/SSN)
  - Large organizations, such as universities or hospitals, may need to coordinate across multiple departments or programs

Be thoughtful about which email is associated with your Agiloft account

- An email address can only be associated with one company profile
- It is strongly recommended that Agiloft accounts be associated with an individual user’s email address
    - “Generic” email addresses (e.x., ExecDir@org.org) can only be used if *only one* staff member has access to it at any given time and your organization can keep track of who had access to it over time

- Shared inboxes (e.g., grants@company.org) may not be used
    - Strips away the system’s ability to track which staff members submitted various information, including invoices, which is essential for fiscal and HIPAA compliance

There are three types of Agiloft accounts/ 'Groups' for providers

Provider Staff Account

- Access executed contract documents
- Apply to funding opportunities
- Access company documents
- *Cannot* see or access invoice tile

Provider Finance Staff Account

- Can see and submit invoices
- Combine with Provider Staff Account group for more access

Provider Account Manager (PAM)

- All the above, plus can:
  - Create and manage other staff accounts
  - Maintain company profile
  - Upload company documents, such as certificates of insurance and W-9s

Only Provider Account Managers can create and manage accounts for other provider staff

- An organization's first Provider Account Manager (PAM) account must be created by DCHS
  - See https://kingcounty.gov/en/dept/dchs/human-social-services/funding-opportunities-dchs/agiloft for more details

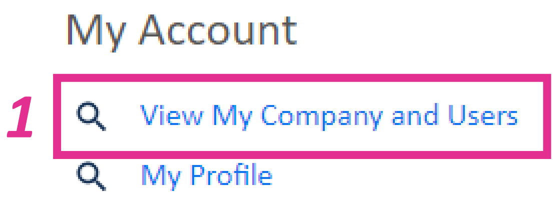
3

−OR− Submit information to DCHS to become a Provider Account Manager

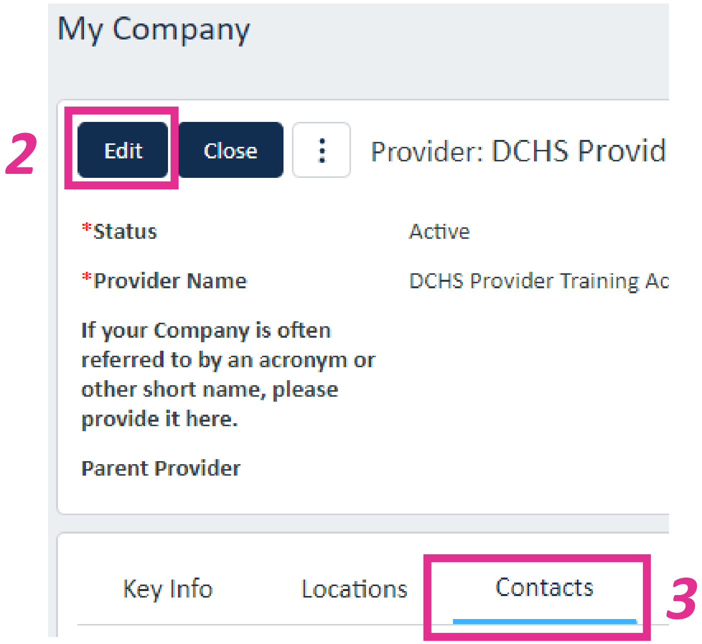
If your organization is not listed in the table above, then it does not, yet, have a Provider Account Manager. To become your organization's Provider Account Manager, please complete this brief form and email it to DCHSAgiloft@kingcounty.gov. DCHS will verify your organization and set up our account. We will also provide you with training materials about how to maintain your organization's profile and accounts. We typically process and create Provider Account Manager logins within three business days.

- An organization can have more than one PAM

To view and manage staff accounts, navigate to the "My Account" tile



Users can view information about their company and account by clicking these links



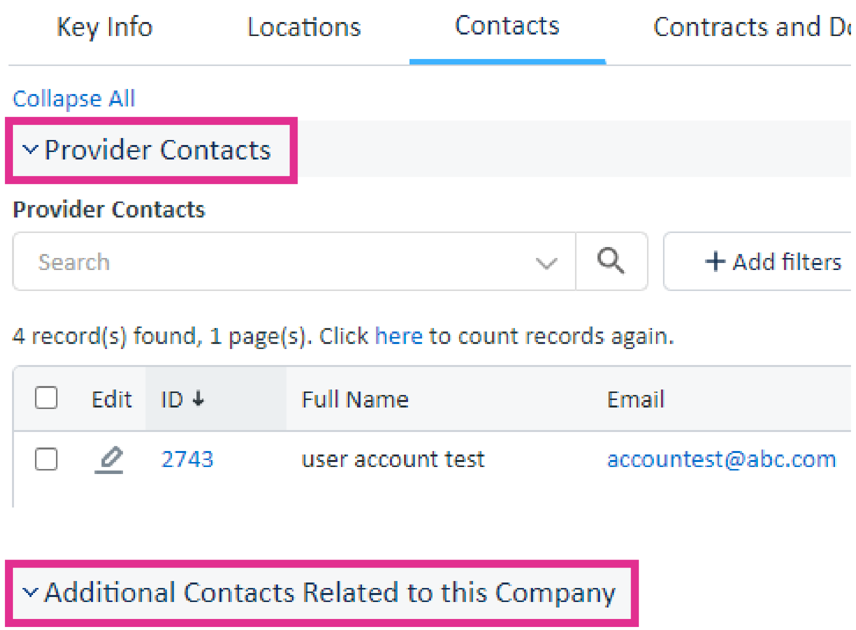
To view and manage staff account:

1. *Click 'View My Company and Users' on 'My Account' tile*
2. *Click 'Edit'*
3. *Click on the 'Contacts' tab*

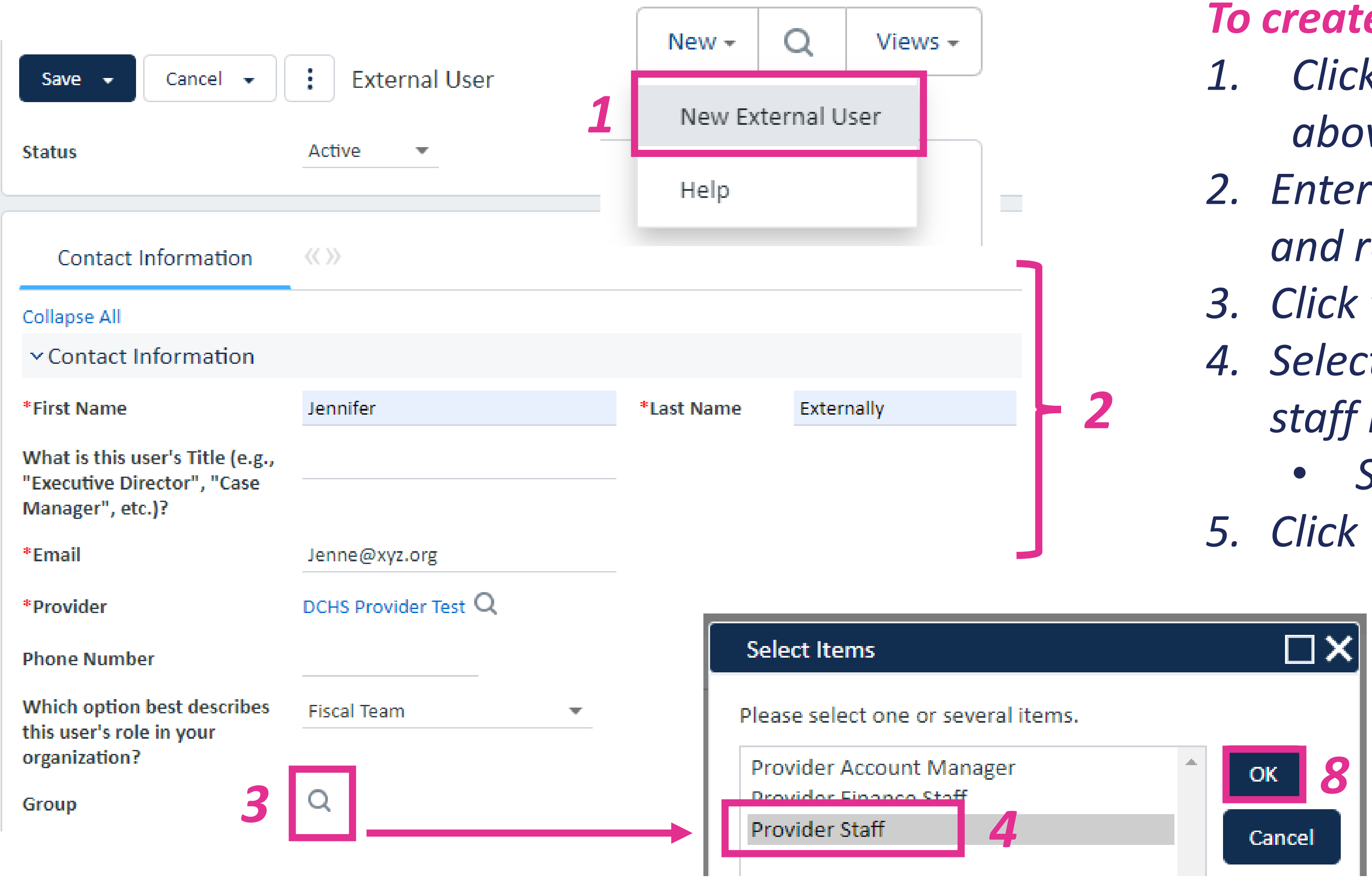
There are two tables of contacts

- *Provider Contacts*: Staff accounts with associated logins/access to the provider's Agiloft profile

- *Additional Contacts Related to this Company*: Staff associated with the provider, but who do *not* have a login or access to the provider's Agiloft profile
  - This can be helpful to designate authorized singers, such as CEOs, who may not need access to Agiloft
  - DCHS staff are also using this feature to centralize contact information to create distribution lists and facilitate communication with providers



Only PAMs can create and manage accounts for other provider staff (“Provider Contacts”)



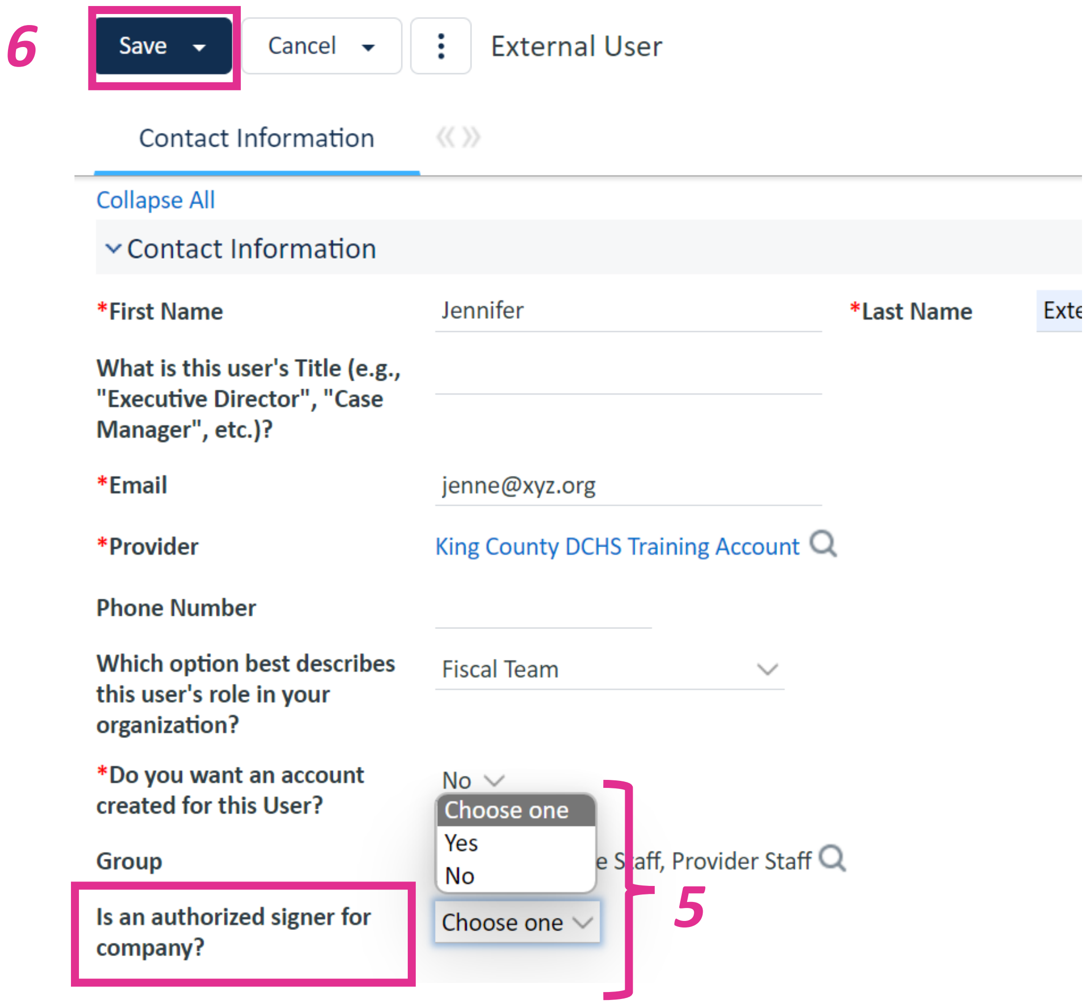
To create a new staff account:

1. *Click ‘New’ and ‘New External User’ above the ‘Provider Contacts’ table*
2. *Enter the person’s name, email address, and role*
3. *Click the magnifying glass by ‘Group’*
4. *Select the appropriate group(s) for the staff member*
   - *Select more than one by Ctrl+click*
5. *Click ‘OK’*

Continued on next slide…

An account’s “Group” determines which tiles the person can access—see slide 14

Choose whether the person can sign contracts for the agency, then Save



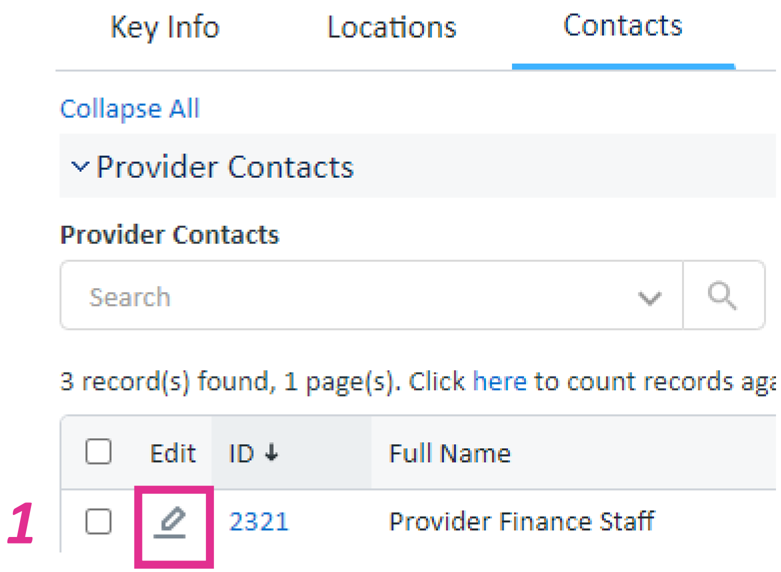
Creating a new staff account, cont'd:

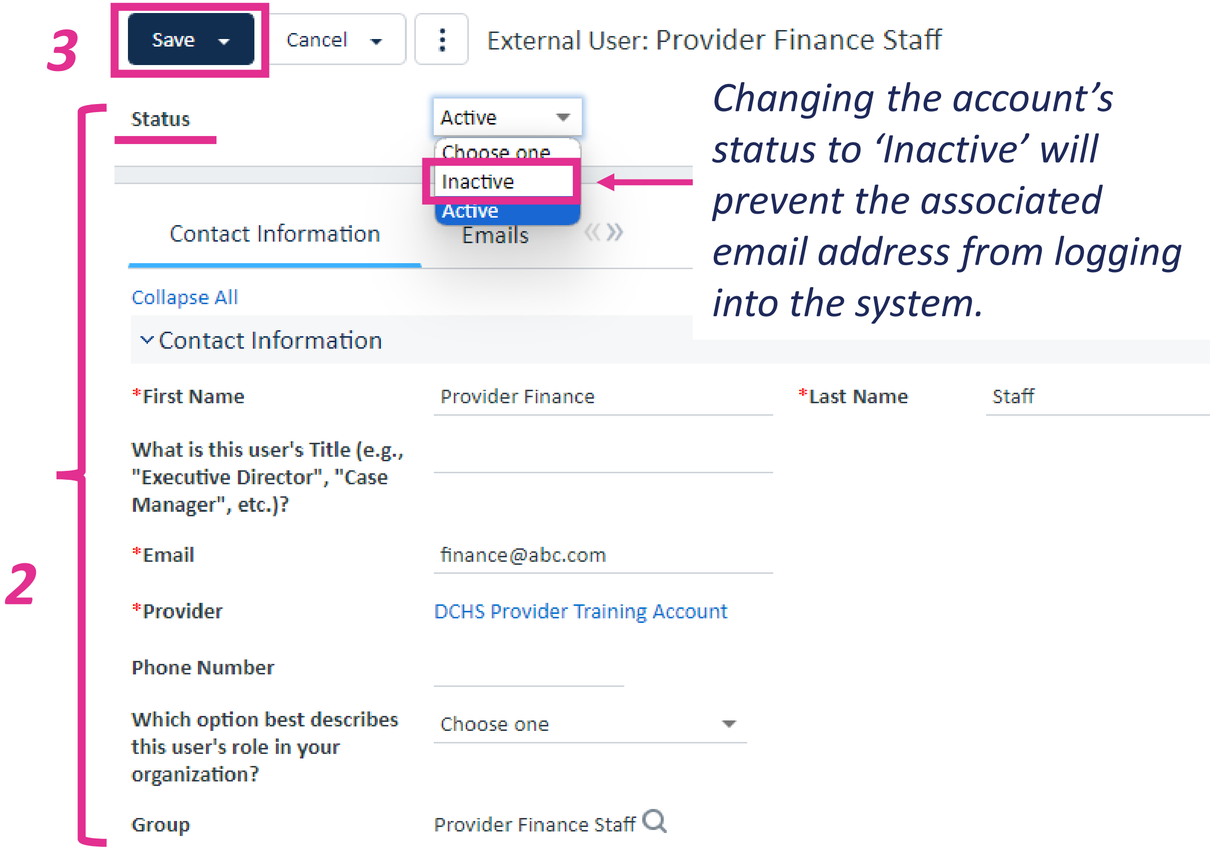
5. *Indicate whether the user is an authorized signer for your organization's contracts*
   - *Authorized signers can sign contracts on behalf of the agency*
   - *Any finance user can attest to and submit an invoice*
6. *Click 'Save' to close the record and send the person a welcome email*

A PAM can edit or deactivate accounts associated with their provider

To edit an account:

1. *Click pencil icon in account's row*
2. *Make needed changes*
3. *Click 'Save'*



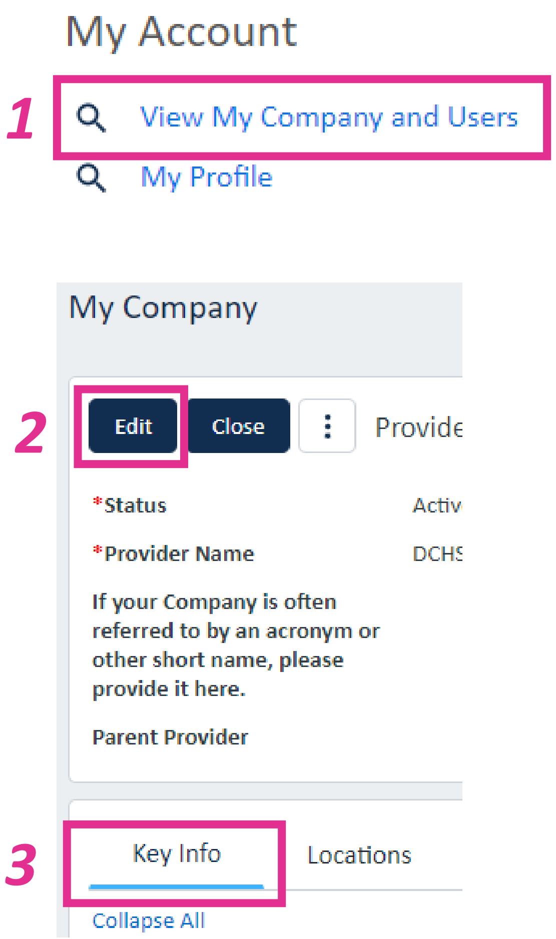


Changing the account's status to 'Inactive' will prevent the associated email address from logging into the system.

Maintaining Your Company’s ‘Key Info’ Tab

Critical information for contracting and reporting

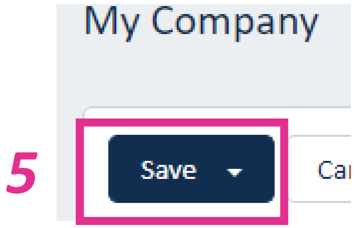
PAMs should complete and maintain company ‘Key Info’



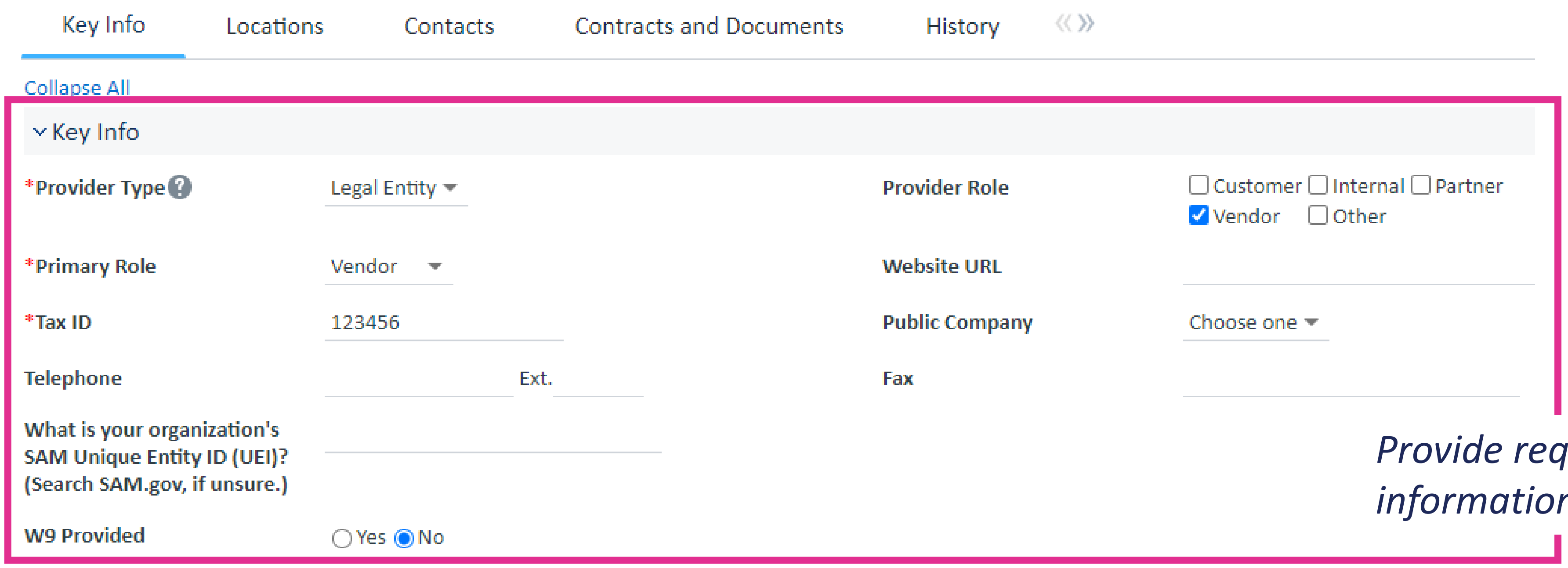
To edit company information or locations:

1. *Click ‘View My Company and Users’ on ‘My Account’ tile*
2. *Click ‘Edit’*
3. *Click on the ‘Key Info’ tab*
4. *Provide the requested information*
5. *Click ‘Save’*

4 See details for each subsection on following slides



Key Info


Key Info | Locations | Contacts | Contracts and Documents | History

Collapse All

Key Info

*Provider Type: Legal Entity

Provider Role: Customer, Internal, Partner, Vendor (checked), Other

*Primary Role: Vendor

Website URL

*Tax ID: 123456

Public Company: Choose one

Telephone Ext.

Fax

What is your organization's SAM Unique Entity ID (UEI)? (Search SAM.gov, if unsure.)

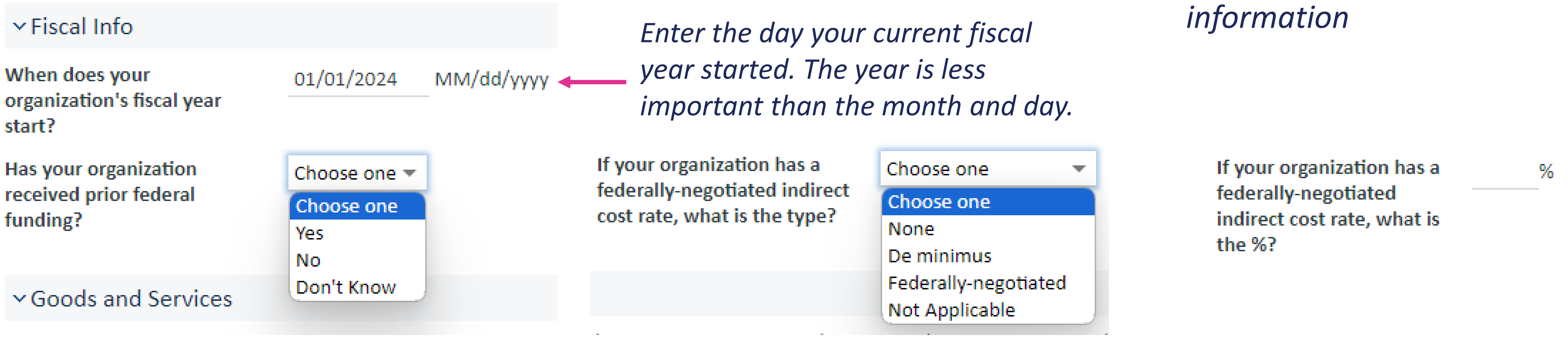
W9 Provided: Yes / No (selected)

Provide requested information

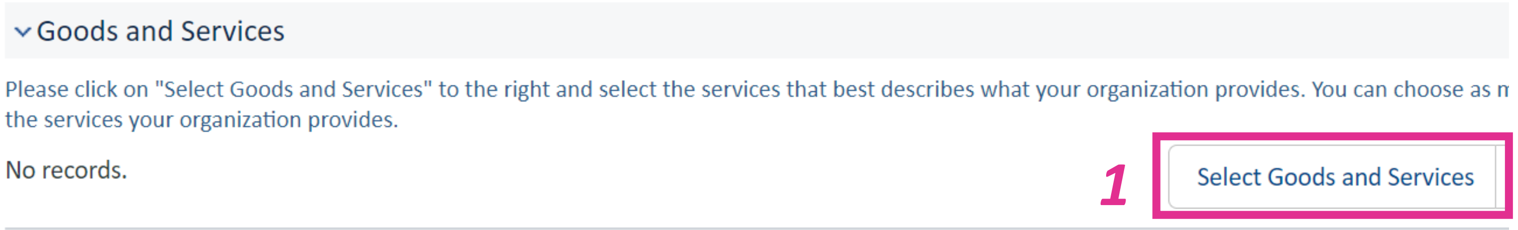
Fiscal Info

Provide requested information

Enter the day your current fiscal year started. The year is less important than the month and day.



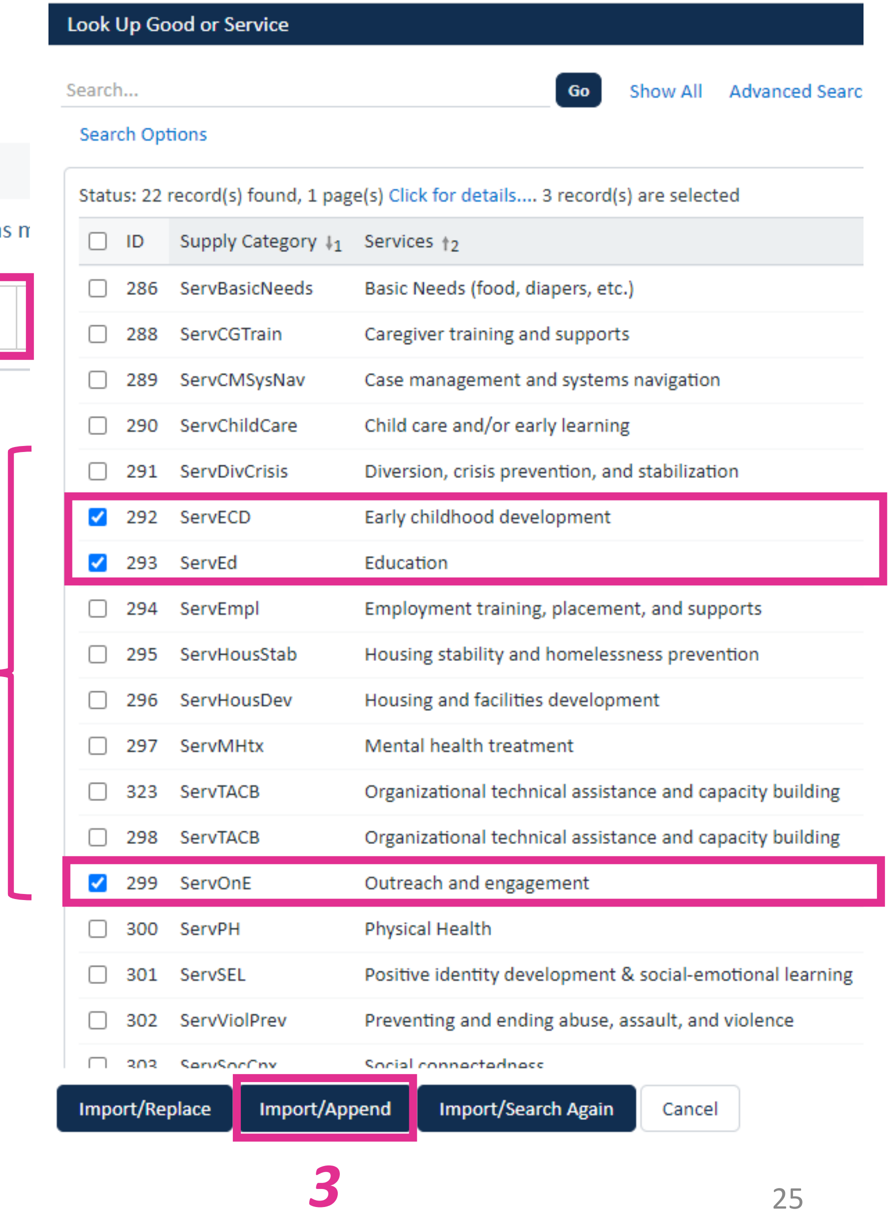
Goods and Services



- Goods and Services is a new concept DCHS is using to better understand our investments and provider base and the service array they support

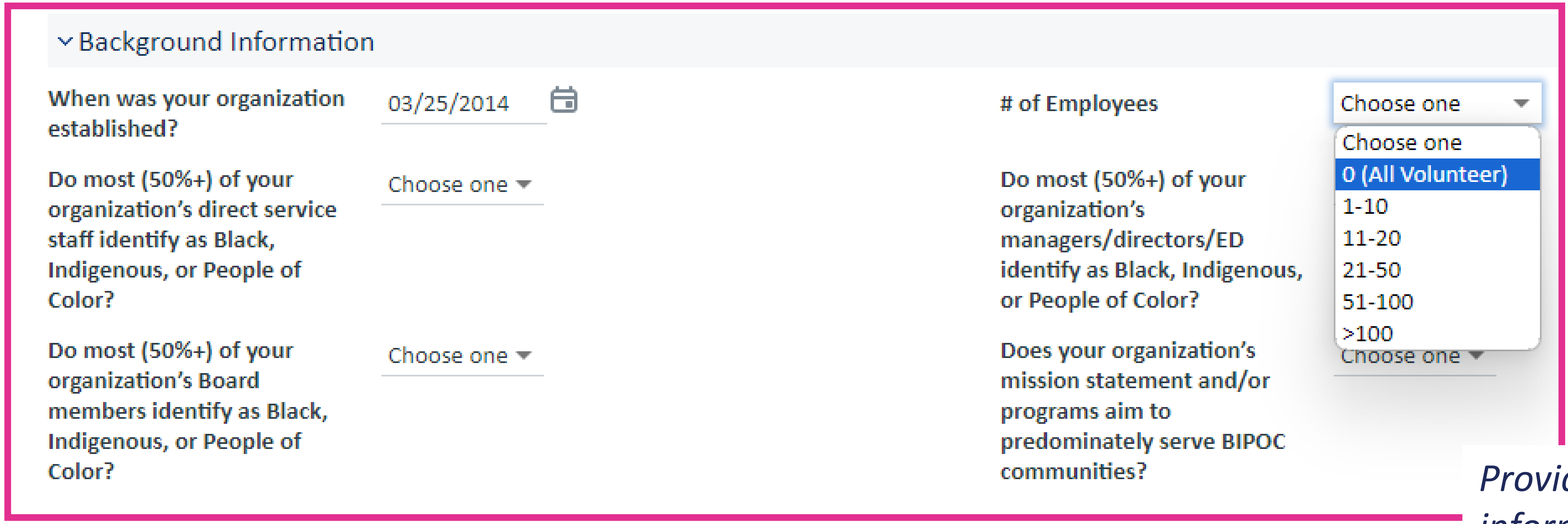
- Going forward, each funding opportunity and contract will also be tagged with at least one ‘Goods and Services’ to describe the broad category(ies) of services being contracted for

Choose the ‘Goods and Services’ that best describe the services your organization provides



Background Information

- The information in this section will *not* be used in funding award decisions
- These questions are being asked to better understand our provider partners and track changes over time when monitoring DCHS' efforts to support and sustain a diverse array of organizations at various stages of development that reflect the communities they serve



Background Information

When was your organization established? 03/25/2014

# of Employees: Choose one (Choose one / 0 (All Volunteer) / 1-10 / 11-20 / 21-50 / 51-100 / >100)

Do most (50%+) of your organization's direct service staff identify as Black, Indigenous, or People of Color? Choose one

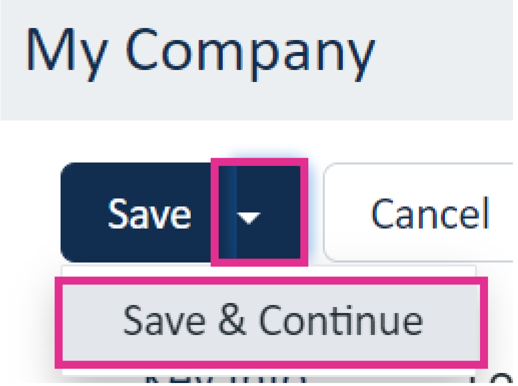
Do most (50%+) of your organization's managers/directors/ED identify as Black, Indigenous, or People of Color?

Do most (50%+) of your organization's Board members identify as Black, Indigenous, or People of Color? Choose one

Does your organization's mission statement and/or programs aim to predominately serve BIPOC communities? Choose one

Provide requested information

At any time, you can ‘Save & Continue’



Clicking ‘Save’ will save newly added information and close record.

Maintaining Your Company’s ‘Locations’ Tab

Critical information for contracting and reporting

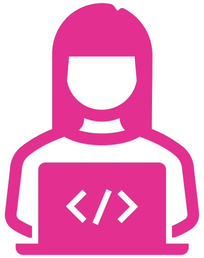
Please maintain your location information!

- You will no longer have to answer cumbersome geography questions when applying for funding opportunities or responding to “narrative reporting”

- DCHS will be able to:
  - Better understand how our region is being served
  - Streamline monitoring of facility licensure
  - Meet geographic reporting requirements

We care about *how* services are being provided, not just where

- Our contracts will track where office-based contracted services are being performed
- We will also capture information about whether your services are available in the community, participants’ homes, and/or remotely
- For many programs we also collect information about where service participants live to assess service accessibility



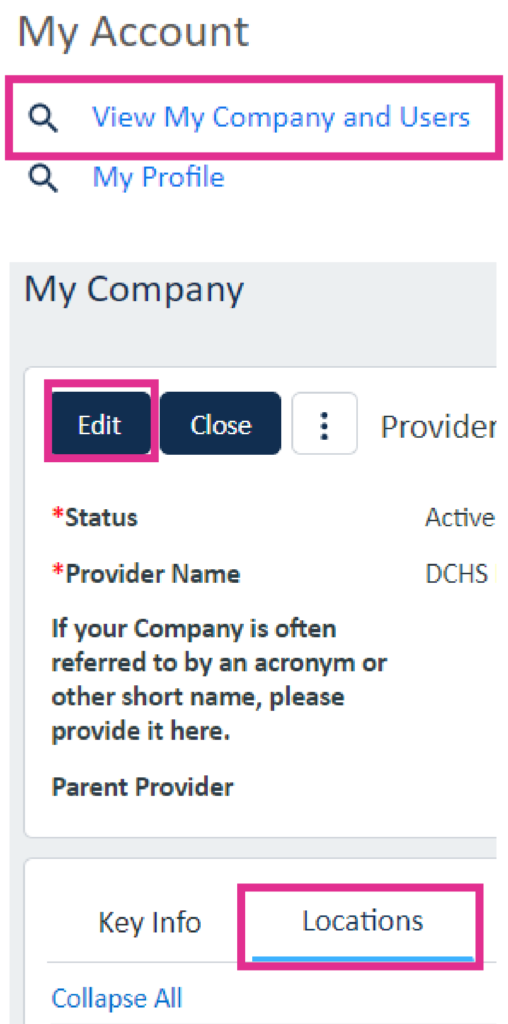
Which locations should you include?

- ALL the "brick and mortar" locations in which the organization *regularly* provides DCHS-funded services
  - Even if the location is outside of King County
  - This includes the locations of buildings being constructed using DCHS funds
- "Regularly provided" means that a service participant could expect to find staff or services at a location during specific and recurring hours

- If your organization provides occasional services/events in community or other partners' spaces, you do not need to enter those locations
  - These services would be considered community-based, not office-based

PAMs can create location records on the ‘Locations’ tab

1
2
3



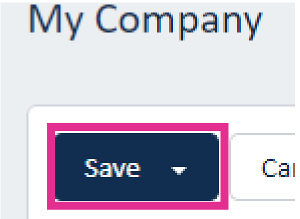
To add a location to your company profile:

1. *Click ‘View My Company and Users’ on ‘My Account’ tile*
2. *Click ‘Edit’*
3. *Click on the ‘Locations’ tab*
4. *Click ‘New’ to the right of the ‘Company Locations’ table*
5. *Enter location information*
6. *Click ‘Save’*

4

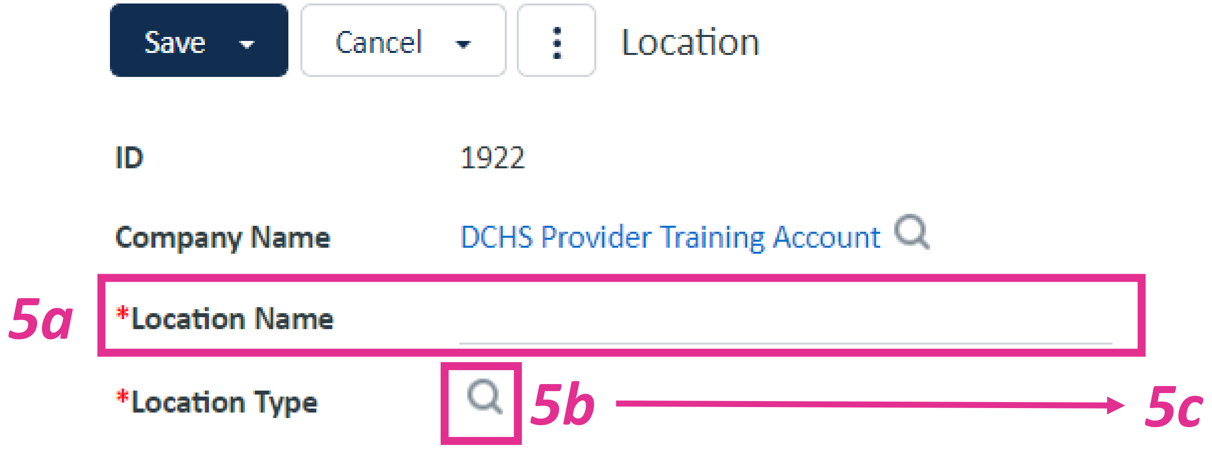
5 ***See details on following slides***

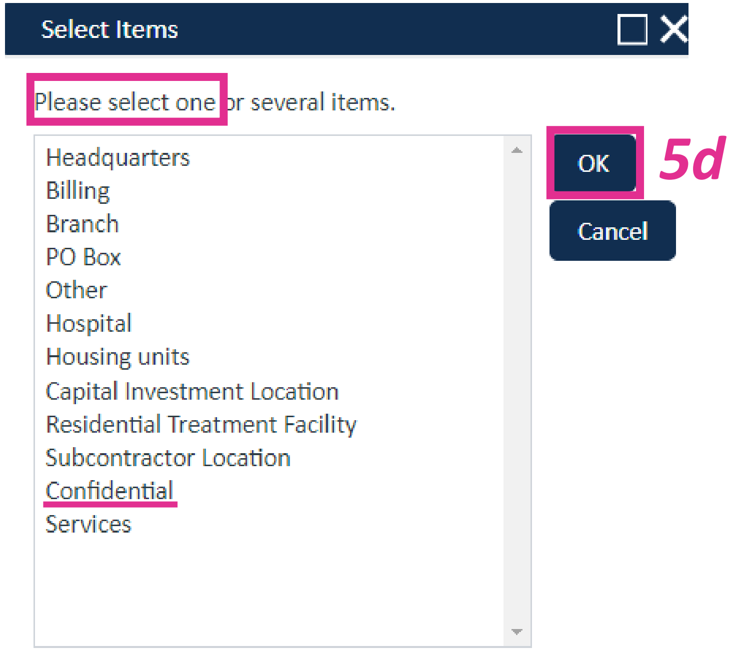
6



Provide the location's name and select a type

If the location is referred to by a name (e.g. "The Chinook Building," "Tukwila Office," etc.), enter it on the line by 'Location Name'. Otherwise, enter the street address.



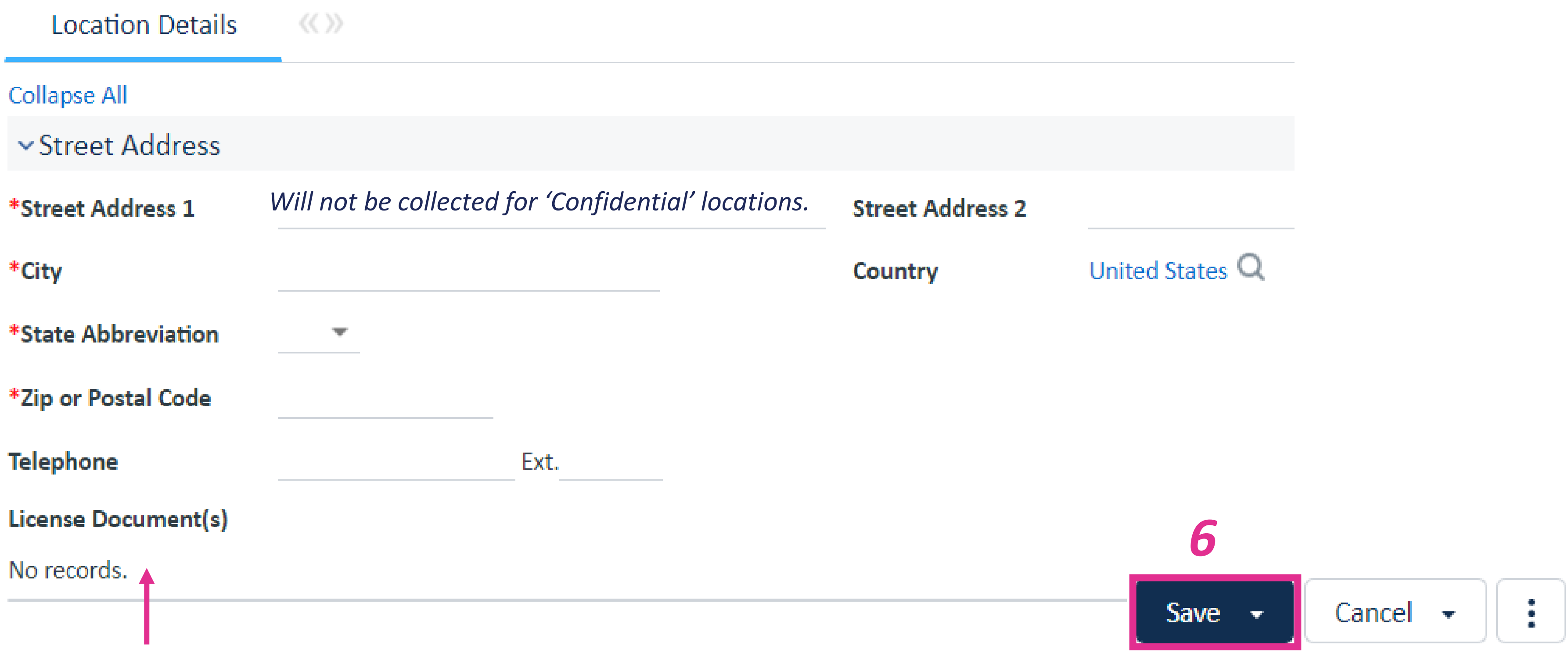


- *PO Boxes should not be used to describe where services are provided.*
- *Confidential locations will not ask for a street address, only city, state, and zip code. Use this for homeless or DV shelters, etc.*

Provide the location’s address, then ‘Save’

5e

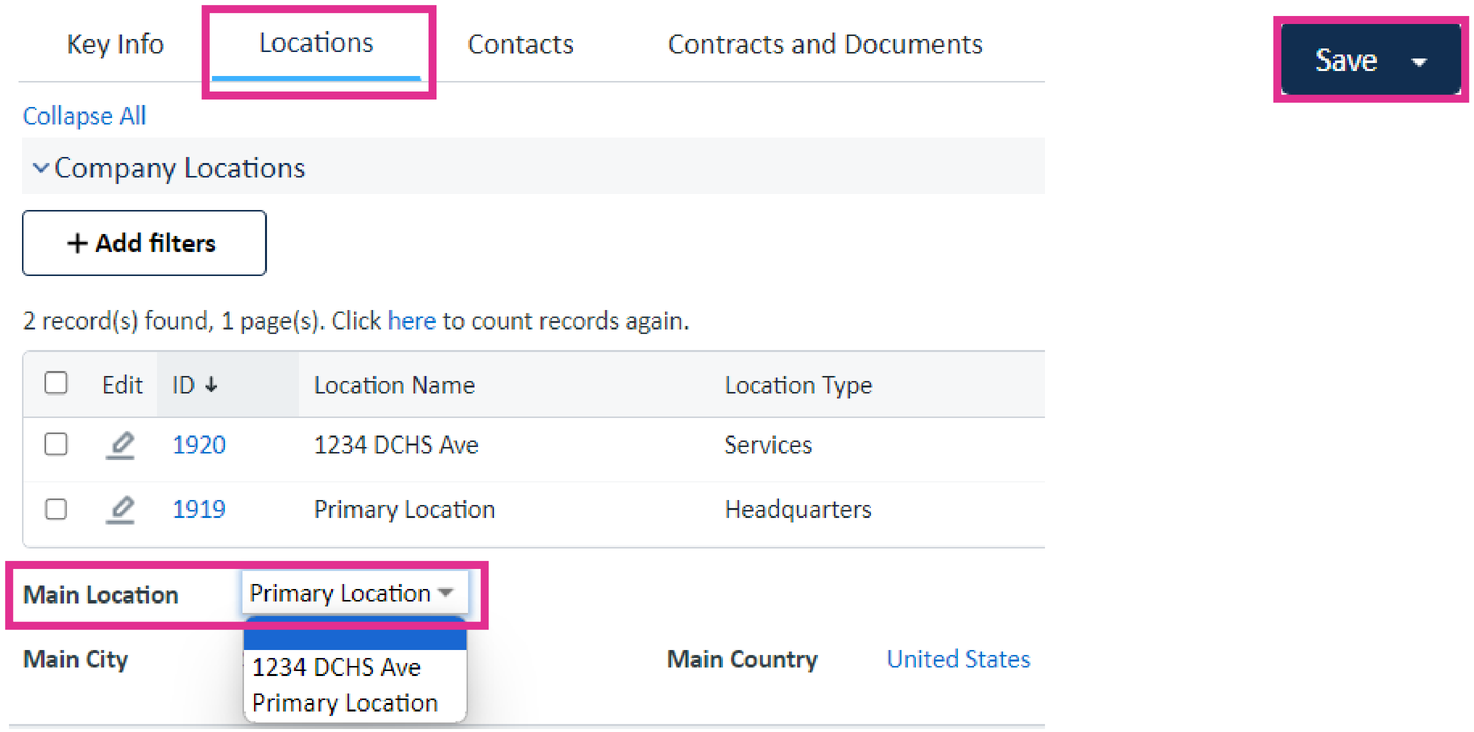
6



When a license document is verified by DCHS and associated with a location, it will appear here.

Indicate which location is your organization's 'Main Location'

- This is usually the organization's headquarters

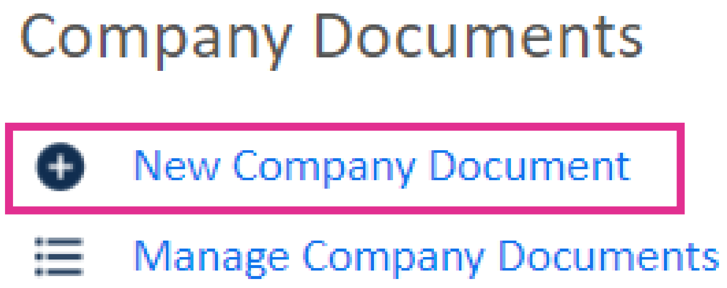


Uploading Company-Related Documents and Reports

Company Documents Tile

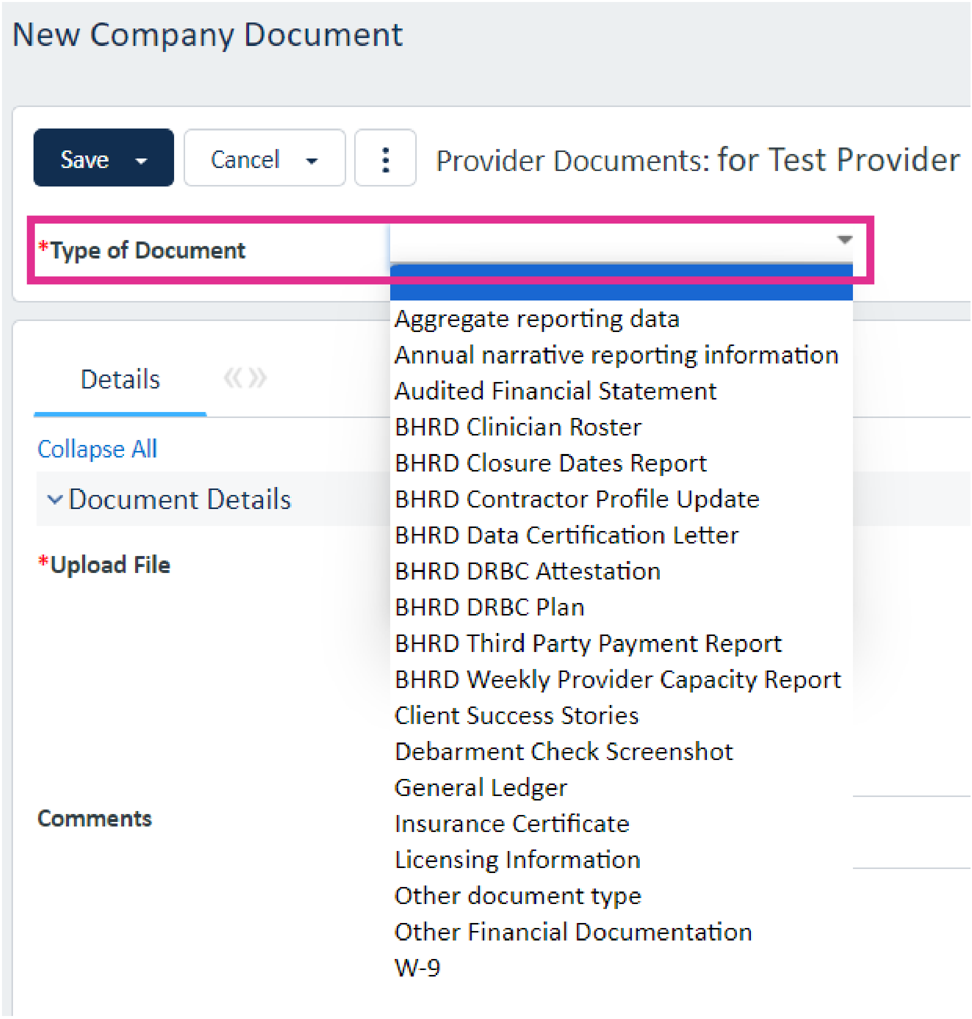
Documents such as W-9s, Certificates of Insurance, etc. can now be uploaded via Agiloft

- This creates a central repository easily accessible by provider and DCHS staff
- Automatic notifications will alert provider and DCHS staff when a document is expiring
- Note: every contracted provider will still need to register as a supplier with King County's Procurement & Payables

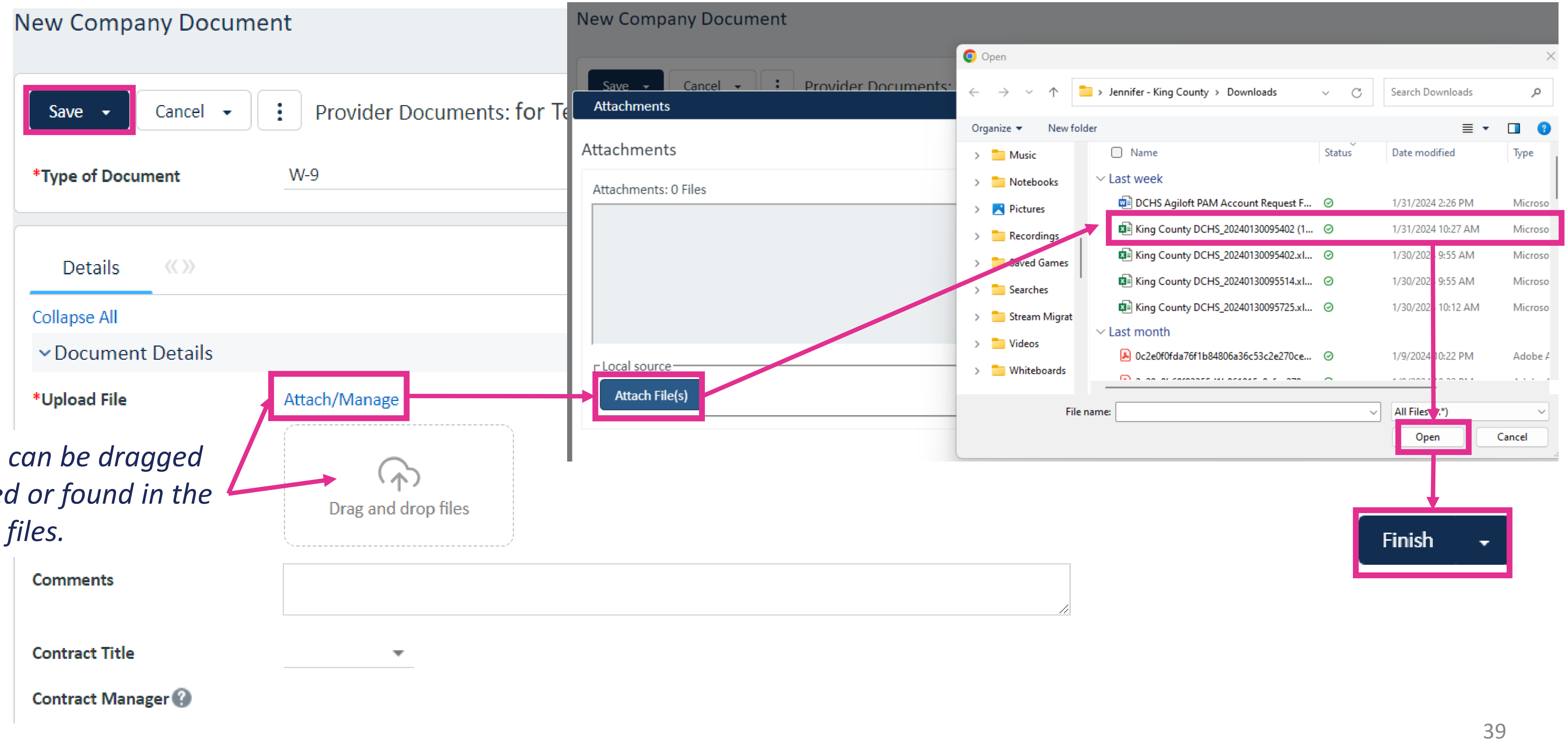


"Documents" can be any kind of file. The do not just need to be MS Word or text files.

Choose the type of document being uploaded



Find and attach the file—be thoughtful about the name



Documents can be dragged and dropped or found in the computer's files.

Many reports submitted by some BHRD providers can be uploaded via Agiloft

- Reports listed on pages 16 & 17 of the Provider Manual will now be submitted via Agiloft
- These should be uploaded as company documents via the portal
  - See instructions in step-by-step guide to managing your company's profile

Frequency	Report	Report Requirements	Frequency/ Schedule	Dollars at Risk (Per Each Due Date)	Program
Weekly	Weekly Provider Capacity Reporting Form	See "Capacity to Intake New Clients and Support Linkage to Care" section of this manual.	Weekly as needed	N/A	KCICN
Monthly	Data Certification Letter (Data Attestation)	Provider submits the certification letter.	Monthly	N/A	KCICN
Quarterly	Third Party Payment Report	Third Party Payments collected by category of payment (e.g., private pay, insurance, Medicare). Providers submit Third Party reports for all Medicaid programs (MH & SUD outpatient, MAT, residential). Program payments can be combined, with the exception of MAT which needs to be on a separate report.	• January 31 • April 30 • July 31 • October 31	N/A	KCICN (MH, SUD and MAT outpatient only)
Quarterly	Clinician Roster	All programs providing Medicaid-funded services must submit the following quarterly reports: A Clinician Roster in a report format provided by BHRD to include, but not limited to, a complete list of providing clinicians, licensure information, specialty training, etc.	• March 6 • June 7 • September 6 • December 6	N/A	KCICN

Frequency	Report	Report Requirements	Frequency/ Schedule	Dollars at Risk (Per Each Due Date)	Program
Quarterly	Contractor Profile Update	Provider submits up-to date Contractor profiles and licenses	• January 31 • April 30 • July 31 • October 31	N/A	KCICN, BH-ASO
Annual	Audited Financial Statements	Complete audited financial statements with auditor's opinion, management letter, and A-133 audit where federal funding threshold is met.	30 days after received by Provider no later than 9 months after end of fiscal period.	N/A	KCICN, BH-ASO
Annual	Certificate of Insurance and Endorsement	See contract boilerplate for details.	Upon expiration of previous insurance certificate	Payment is held until updated insurance is approved	KCICN, BH-ASO
Annual	Closure Dates Report	All Providers submit to BHRD an annual planned closure schedule.	January 31	N/A	KCICN, BH-ASO
Annual	Disaster Recovery Business Continuity (DRBC) Attestation	All Providers submit to BHRD a DRBC Attestation of: • Required elements of the agencies DRBC program • Annual test of Information System (IS) system for data back-up and recovery	January 31	N/A	KCIN-BH-ASO
Annual	Disaster Recovery Business Continuity (DRBC) Plan	All Providers submit to BHRD a DRBC Plan that includes the following elements:	January 31	N/A	KCICN, BH-ASO

Accessing Active Contracts

Contracts Tile

Contract records can be found on the ‘Contracts’ tile

Parts of a contract record:

- Common Area
  - Basic information about the contract and DCHS contacts
- Details Tab
  - Detailed information about the contract, services being provided, service modality, term and renewal, etc.
- Attachments Tab
  - Access to executed contract documents, funding overviews, etc.
  - May eventually be used to house other contract-related documents, such as Performance Measurement plans

Contracts record parts, continued

- Finance Tab
  - Total budget for the contracts and amount spent down
- Emails Tab
  - Emails sent from DCHS about the contract
- Renewal/Related Contracts Tab
  - Related contract records, such as amendments
- Invoice(s)
  - Not on boilerplate records
  - All invoices related to the contracts
    - Invoices must be managed on the ‘Invoices’ tile
- Invoice Approvals Tab
  - When invoices were approved and by which DCHS staff

Contract review and negotiations take place via email

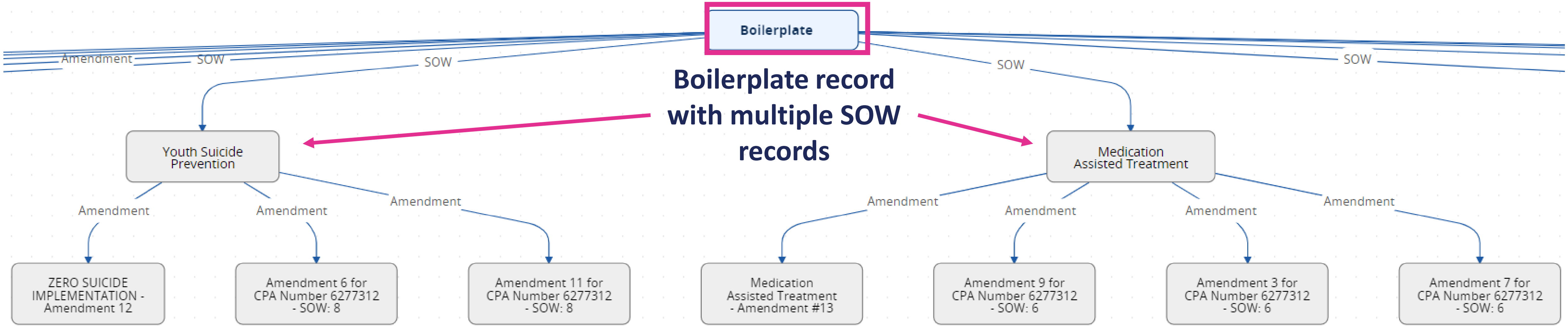
- This allows anyone to be involved in contract review and negotiations, not just those staff with Agiloft accounts
- Final contract documents are sent for signature via DocuSign

Boilerplates and Statements of Work (SOW)

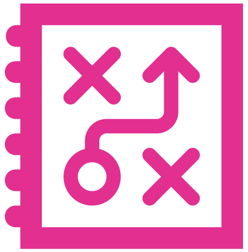
- For the past several years, DCHS has had a practice of attaching multiples Statements of Work (SOWs) (previously referred to as ‘Exhibits’) to a single Boilerplate
- To migrate these contracts and their data in this structure, each SOW/exhibit has its own contract record in Agiloft
  - Each SOW/exhibit record must be associated to, or be a “child of”, a Boilerplate record
  - A SOW can have multiple amendment records associated with it.
- By Spring 2024, all new non-KCICN/BHASO services contracts will be combined into a single “Standard Services Contract” record and document for easier execution and navigation

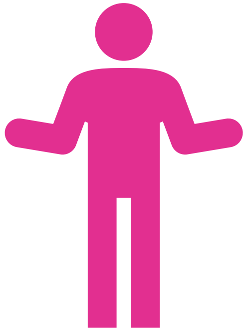
Click this icon on your contract table to see how each record is related to other records.

Example: Boilerplate with multiples SOWs



- *The fully executed document can be found on the 'Attachments' tab of the Boilerplate record.*
- *Data about the SOW/exhibit's funding, term, etc. can be found on the SOW record.*
- *Invoices are based on the SOW record.*
- *Amendments can now only amend one SOW at a time.*
- *Migrated amendments were migrated with each impacted SOW/exhibit, so may appear multiple times.*





Find support at

https://kingcounty.gov/en/dept/dchs/human-social-services/funding-opportunities-dchs/agiloft

or DCHSAgiloft@kingcounty.gov

Guides to the ‘Funding Opportunities’ and ‘Invoices’ tiles will be provided separately

Funding Opportunities

- View details about open DCHS and all BSK* funding opportunities
- Apply for DCHS and all BSK* funding opportunities

Funding opportunities in Agiloft will likely launch early 2025.

*Best Starts for Kids (BSK) funding opportunities managed by Seattle-King County Public Health will also be administered in DCHS’ Agiloft system

Invoices

- Submit invoices and supporting documentation
- Track the status of submitted invoices

Most BHRD-funded contracts began invoicing via Agiloft in February 2024.

The remainder of DCHS will roll out invoicing later in 2024 .