

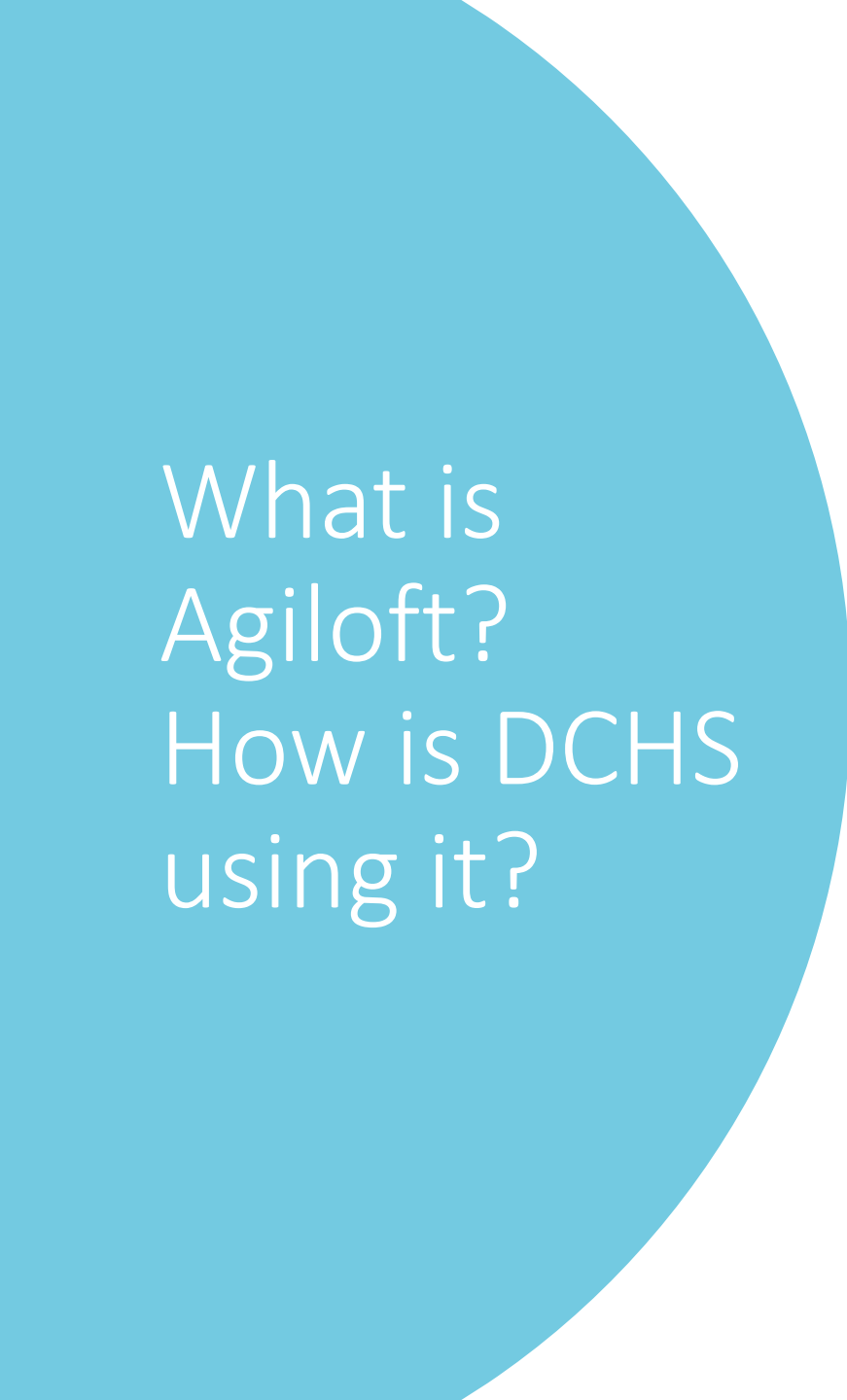


# Managing Your Agiloft Accounts and Company Profile For DCHS Contracted Providers

# 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 DCCHS using it?

- Agiloft is a modern contract lifecycle management software used by hundreds of companies around the world.
- DCCHS 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

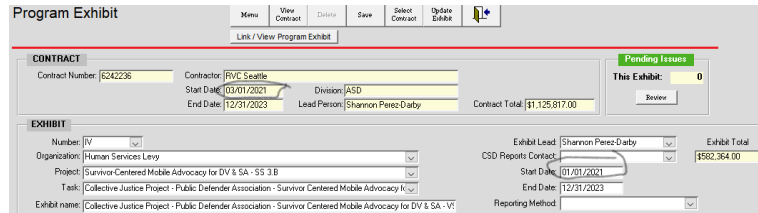
**SILOED UNSUPPORTED SYSTEMS**



**SINGLE MODERN CONFIGURABLE SYSTEM**

## Contract Management System (CMS)

*Customized Access System for routing and tracking non-BHRD contracts*



## ZoomGrants

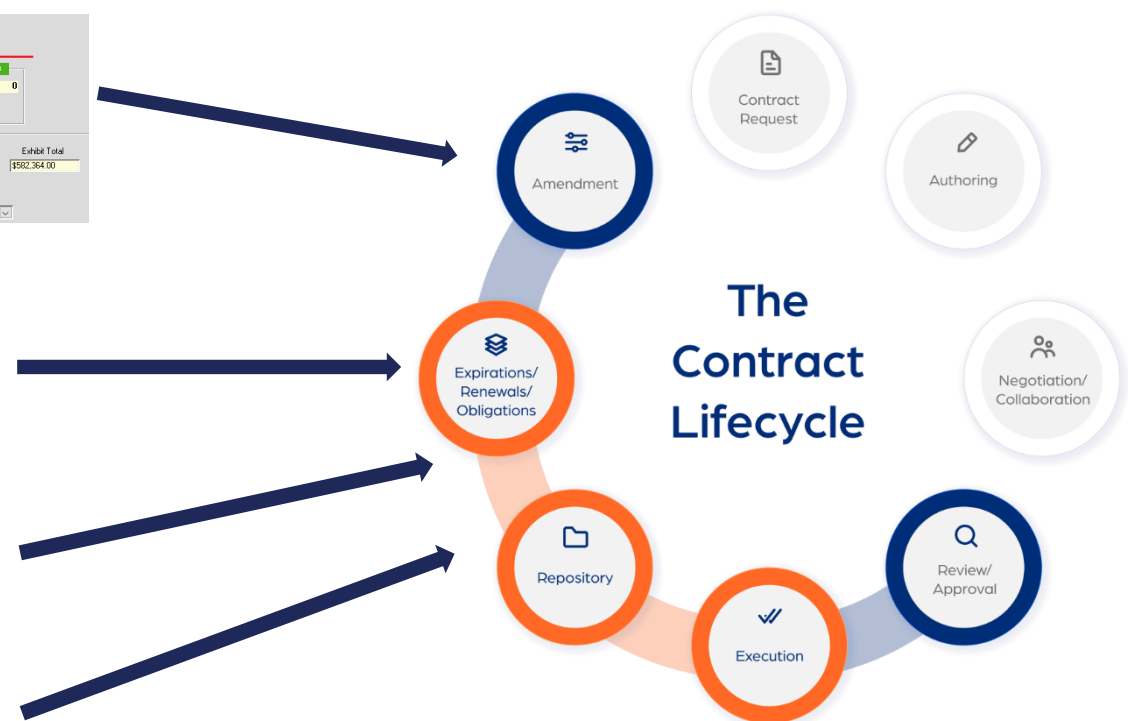
*Subscription-based Online Solicitation Management System; also used for invoicing by some teams*



## Chemical Dependency Contract Tracking (CDCT)

## & Invoice Processing (CDIP)

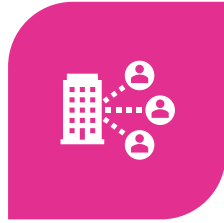
*Customized PowerBuilder System for BHRD Contract and Invoice Management*



# How will DCHS-contracted providers use Agiloft?



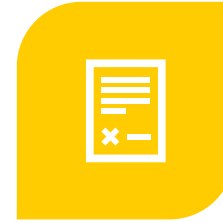
**MANAGE STAFF  
ACCOUNTS AND  
ACCESS**



**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 DCCHS logo to go back to the home screen

The screenshot displays a grid of five tiles on a light gray background. Each tile has a title and a list of links with search or list icons. The tiles are: 'My Account' (View My Company and Users, My Profile), 'Company Documents' (New Company Document, Manage Company Documents), 'Contracts' (View My Contracts, View All Contracts), 'Funding Opportunities' (View Sourcing Events by Services Provided, View Invite Only Sourcing Events, View Public Sourcing Events, View All Sourcing Events, View My Responses), and 'Invoices' (View My Companies Pending Invoices, View My Assigned Pending Invoices, View All My Invoices, View All Approved/Paid Invoices, View All Invoices). A pink border highlights the entire grid area.

← **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

Close Contract: Buying Cookies

ID	867	Status	Approved
*Record Type	Contract	*Contract Type	Boilerplate
*CPA Number	123456		
*Contract Manager	Andy Huynh		
Business Finance Officer		Finance Email	
PME Evaluator			
*Provider Name	King County UAT Provider 1		
Provider Main Location Name	Main Location	Provider Main Address	Whitehouse 123, Washington DC, DC 26456, United States
Provider Contact Name	Jennifer UAT Test	Provider Contact Email	jennifer_schurer@yahoo.com
Related SOW(s) Total		Total Amount Invoiced	
Amount Remaining to be Scoped	\$0.00	Total Amount Remaining with Invoicing	\$0.00

**COMMON AREA**

**FIELDS**

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

Closed > Draft > Pending Review > With Counterparty > Pending Approval

**STATUS / WORKFLOW BAR**

Details | Attachments | Finance | Emails | Renewal / Related Contracts | Tasks and Obligations | History << >>

**TABS**

Expand All | Collapse All

Requester Information

Contract Record Creator	Andy Huynh	Contract Record Creator Email	anhuynh@kingcounty.gov
-------------------------	------------	-------------------------------	------------------------

Contract Information

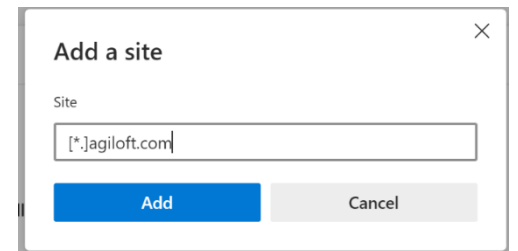
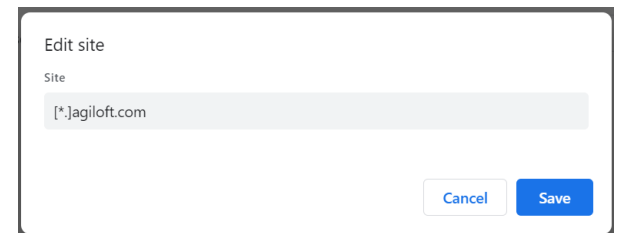
*Contract Title	Buying Cookies		
*Contract Description	Buying cookies		
*Division Administering Contract	Homelessness, Housing and Community Development Division	Division Acronym	HHCCD
Based on Solicitation?	No		

**SUBSECTIONS**



# 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`
  - CHROME: 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](mailto: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](mailto: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

## My Account

1

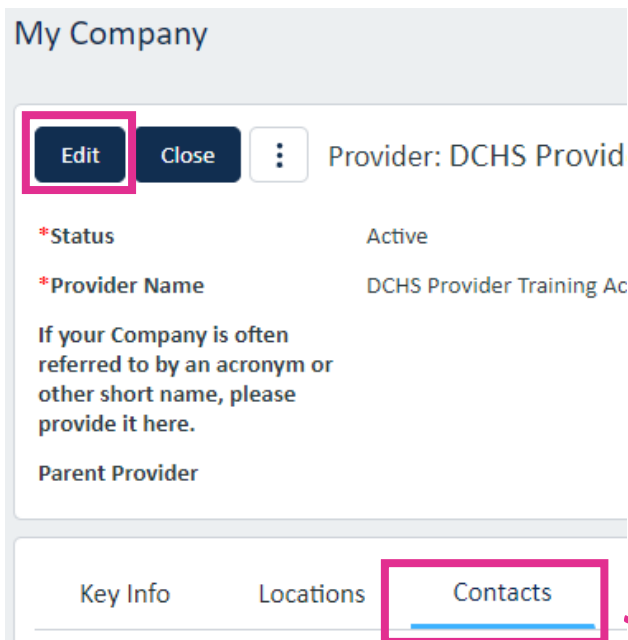


Users can view information about their company and account by clicking these links

## 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

2



3



# 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

The screenshot shows a web interface with tabs for 'Key Info', 'Locations', 'Contacts', and 'Contracts and D...'. The 'Contacts' tab is selected. Below the tabs, there is a 'Collapse All' link and a dropdown menu with 'Provider Contacts' selected. Below this, there is a search bar with the text 'Search', a search icon, and a '+ Add filters' button. Below the search bar, it says '4 record(s) found, 1 page(s). Click [here](#) to count records again.' Below this is a table with columns: 'Edit', 'ID ↓', 'Full Name', and 'Email'. The table has one row with a checkbox, an edit icon, the ID '2743', the name 'user account test', and the email 'accounttest@abc.com'. Below the table, there is another dropdown menu with 'Additional Contacts Related to this Company' selected.

<input type="checkbox"/>	Edit	ID ↓	Full Name	Email
<input type="checkbox"/>		2743	user account test	<a href="mailto:accounttest@abc.com">accounttest@abc.com</a>

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

External User

Status: Active

Contact Information

\*First Name: Jennifer

\*Last Name: Externally

\*Email: Jenne@xyz.org

\*Provider: DCHS Provider Test

Phone Number:

Which option best describes this user's role in your organization?: Fiscal Team

Group: [magnifying glass icon]

Select Items

Please select one or several items.

- Provider Account Manager
- Provider Finance Staff
- Provider Staff

OK

Cancel

## 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

6 **Save** Cancel External User

Contact Information <<>>

Collapse All

▼ Contact Information

\*First Name Jennifer \*Last Name Exte

What is this user's Title (e.g., "Executive Director", "Case Manager", etc.)?

\*Email jenne@xyz.org

\*Provider King County DCHS Training Account 🔍

Phone Number

Which option best describes this user's role in your organization? Fiscal Team ▼

\*Do you want an account created for this User? No ▼

Group e Staff, Provider Staff 🔍

**Is an authorized signer for company?** Choose one ▼

5

## 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'

Key Info    Locations    **Contacts**


[Collapse All](#)

▼ Provider Contacts

**Provider Contacts**

Search

3 record(s) found, 1 page(s). [Click here](#) to count records again.

<input type="checkbox"/>	Edit	ID ↓	Full Name
<input type="checkbox"/>		2321	Provider Finance Staff

3   External User: Provider Finance Staff

Status      << >>

Contact Information

[Collapse All](#)

▼ Contact Information

\*First Name  \*Last Name

What is this user's Title (e.g., "Executive Director", "Case Manager", etc.)?

\*Email

\*Provider

Phone Number

Which option best describes this user's role in your organization?

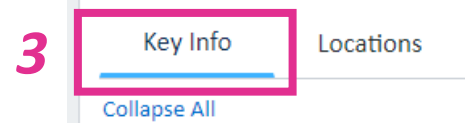
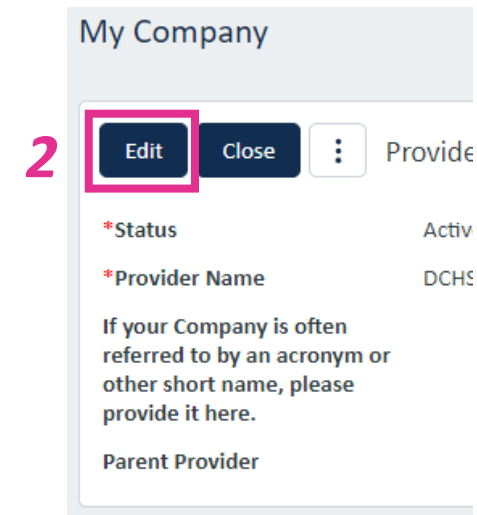
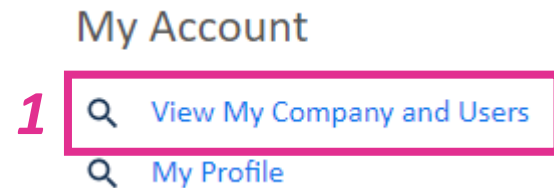
Group

*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

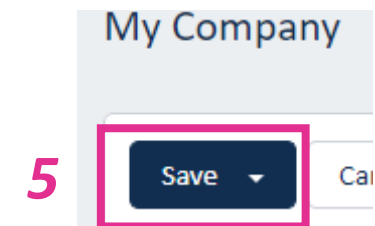
# PAMs should complete and maintain company 'Key Info'



## ***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

<b>*Provider Type</b> <sup>?</sup>	<u>Legal Entity</u> ▼	<b>Provider Role</b>	<input type="checkbox"/> Customer <input type="checkbox"/> Internal <input type="checkbox"/> Partner <input checked="" type="checkbox"/> Vendor <input type="checkbox"/> Other
<b>*Primary Role</b>	<u>Vendor</u> ▼	<b>Website URL</b>	<input type="text"/>
<b>*Tax ID</b>	<u>123456</u>	<b>Public Company</b>	<u>Choose one</u> ▼
<b>Telephone</b>	<input type="text"/> <u>                    </u> <b>Ext.</b> <input type="text"/>	<b>Fax</b>	<input type="text"/>
<b>What is your organization's SAM Unique Entity ID (UEI)?</b> (Search SAM.gov, if unsure.)			
<b>W9 Provided</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No		

*Provide requested information*

# Fiscal Info

*Provide requested information*

▼ Fiscal Info

When does your organization's fiscal year start?  MM/dd/yyyy *Enter the day your current fiscal year started. The year is less important than the month and day.*

Has your organization received prior federal funding?    
    
 Yes   
 No   
 Don't Know

▼ Goods and Services

If your organization has a federally-negotiated indirect cost rate, what is the type?    
    
 None   
 De minimus   
 Federally-negotiated   
 Not Applicable

If your organization has a federally-negotiated indirect cost rate, what is the %?  %



# Goods and Services

## ▼ Goods and Services

Please click on "Select Goods and Services" to the right and select the services that best describes what your organization provides. You can choose as many as you want from the list of services your organization provides.

No records.

1

Select 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*

2

Look Up Good or Service

Search...  [Show All](#) [Advanced Search](#)

Search Options

Status: 22 record(s) found, 1 page(s) [Click for details....](#) 3 record(s) are selected

<input type="checkbox"/>	ID	Supply Category ↓ <sub>1</sub>	Services ↑ <sub>2</sub>
<input type="checkbox"/>	286	ServBasicNeeds	Basic Needs (food, diapers, etc.)
<input type="checkbox"/>	288	ServCGTrain	Caregiver training and supports
<input type="checkbox"/>	289	ServCMSysNav	Case management and systems navigation
<input type="checkbox"/>	290	ServChildCare	Child care and/or early learning
<input type="checkbox"/>	291	ServDivCrisis	Diversion, crisis prevention, and stabilization
<input checked="" type="checkbox"/>	292	ServECD	Early childhood development
<input checked="" type="checkbox"/>	293	ServEd	Education
<input type="checkbox"/>	294	ServEmpl	Employment training, placement, and supports
<input type="checkbox"/>	295	ServHousStab	Housing stability and homelessness prevention
<input type="checkbox"/>	296	ServHousDev	Housing and facilities development
<input type="checkbox"/>	297	ServMHtx	Mental health treatment
<input type="checkbox"/>	323	ServTACB	Organizational technical assistance and capacity building
<input type="checkbox"/>	298	ServTACB	Organizational technical assistance and capacity building
<input checked="" type="checkbox"/>	299	ServOnE	Outreach and engagement
<input type="checkbox"/>	300	ServPH	Physical Health
<input type="checkbox"/>	301	ServSEL	Positive identity development & social-emotional learning
<input type="checkbox"/>	302	ServViolPrev	Preventing and ending abuse, assault, and violence
<input type="checkbox"/>	303	ServSoCov	Social connectedness

3

# Background Information

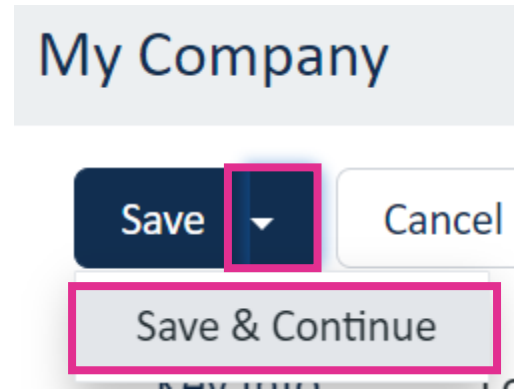
- The information in this section will *not* be used in funding award decisions
- These questions are being asked to better understand our provider partners and track changes over time when monitoring DCHS' efforts to support and sustain a diverse array of organizations at various stages of development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

Background Information

When was your organization established?	03/25/2014	# of Employees	Choose one
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?	Choose one
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?	0 (All Volunteer)

*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

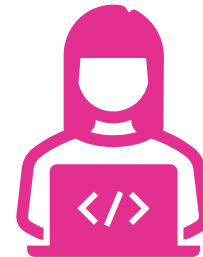
# Please maintain your location information!

- 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

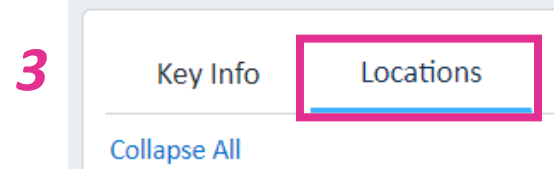
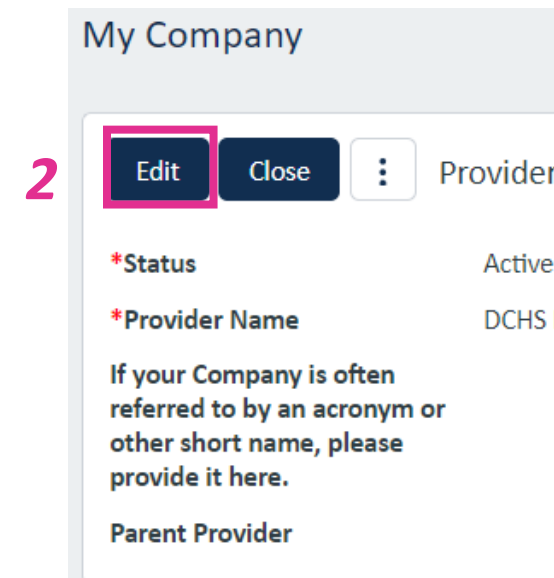
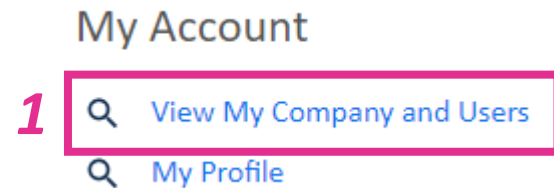


# Which locations should you include?

- 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

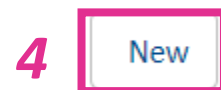


# PAMs can create location records on the 'Locations' tab

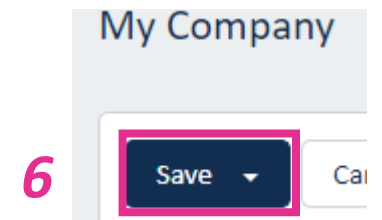


**To add a location to your company profile:**

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'



5 See details on following slides





# 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.

The screenshot shows a 'Location' form with the following fields and annotations:

- 5a**: A pink box highlights the '\*Location Name' field.
- 5b**: A pink box highlights the search icon in the '\*Location Type' field.
- 5c**: A pink arrow points from the search icon in the '\*Location Type' field to the 'Select Items' dialog.
- 5d**: A pink box highlights the 'OK' button in the 'Select Items' dialog.

The 'Select Items' dialog is titled 'Select Items' and contains the text 'Please select one or several items.' Below this is a list of location types: Headquarters, Billing, Branch, PO Box, Other, Hospital, Housing units, Capital Investment Location, Residential Treatment Facility, Subcontractor Location, Confidential, and Services. The 'OK' button is highlighted in pink.

**Location**

Save Cancel Location

ID 1922

Company Name DCHS Provider Training Account

\*Location Name

\*Location Type

Select Items

Please select one or several items.

Headquarters  
Billing  
Branch  
PO Box  
Other  
Hospital  
Housing units  
Capital Investment Location  
Residential Treatment Facility  
Subcontractor Location  
Confidential  
Services

OK Cancel

- 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'

Location Details <<>>

Collapse All

▼ Street Address

**\*Street Address 1** *Will not be collected for 'Confidential' locations.* **Street Address 2** \_\_\_\_\_

**\*City** \_\_\_\_\_ **Country** United States 🔍

**\*State Abbreviation** ▼

**\*Zip or Postal Code** \_\_\_\_\_

**Telephone** \_\_\_\_\_ **Ext.** \_\_\_\_\_

**License Document(s)**

No records. ↑

**6** Save ▼ Cancel ▼ ⋮

*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

The screenshot shows a software interface with a navigation bar at the top containing 'Key Info', 'Locations', 'Contacts', and 'Contracts and Documents'. The 'Locations' tab is highlighted with a pink box. To the right of the navigation bar is a 'Save' button, also highlighted with a pink box. Below the navigation bar is a 'Collapse All' link and a 'Company Locations' section with a dropdown arrow. A '+ Add filters' button is located below the 'Company Locations' section. Below the filter button, a message states '2 record(s) found, 1 page(s). Click [here](#) to count records again.' Below this message is a table with two columns: 'Location Name' and 'Location Type'. The table contains two rows: one for '1234 DCHS Ave' (Services) and one for 'Primary Location' (Headquarters). Below the table is a 'Main Location' dropdown menu, highlighted with a pink box, which is currently set to 'Primary Location'. Below the dropdown menu is a 'Main City' field with a dropdown menu, also highlighted with a pink box, which is currently set to '1234 DCHS Ave'. To the right of the 'Main City' field is a 'Main Country' field set to 'United States'.

ID	Location Name	Location Type
1920	1234 DCHS Ave	Services
1919	Primary Location	Headquarters

Main Location: Primary Location

Main City: 1234 DCHS Ave

Main Country: United States

# 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

## Company Documents



New Company Document



Manage Company Documents

*“Documents” can be any kind of file. They do not just need to be MS Word or text files.*

# Choose the type of document being uploaded

New Company Document

Save Cancel Provider Documents: for Test Provider

**\*Type of Document**

- Aggregate reporting data
- Annual narrative reporting information
- Audited Financial Statement
- BHRD Clinician Roster
- BHRD Closure Dates Report
- BHRD Contractor Profile Update
- BHRD Data Certification Letter
- BHRD DRBC Attestation
- BHRD DRBC Plan
- BHRD Third Party Payment Report
- BHRD Weekly Provider Capacity Report
- Client Success Stories
- Debarment Check Screenshot
- General Ledger
- Insurance Certificate
- Licensing Information
- Other document type
- Other Financial Documentation
- W-9

Details <<>>

Collapse All

Document Details

**\*Upload File**

Comments

# Find and attach the file—be thoughtful about the name

**Save** Cancel Provider Documents: for Te

\*Type of Document W-9

Details <<>>

Collapse All

Document Details

\*Upload File

Attach/Manage

Drag and drop files

Attachments

Attachments: 0 Files

Local source

Attach File(s)

Open

File name: All Files (\*.\*)

Open Cancel

Finish

Name	Status	Date modified	Type
Last week			
DCHS Agiloft PAM Account Request F...	✓	1/31/2024 2:26 PM	Microso
King County DCHS_20240130095402 (1...	✓	1/31/2024 10:27 AM	Microso
King County DCHS_20240130095402.xl...	✓	1/30/2024 9:55 AM	Microso
King County DCHS_20240130095514.xl...	✓	1/30/2024 9:55 AM	Microso
King County DCHS_20240130095725.xl...	✓	1/30/2024 10:12 AM	Microso
Last month			
0c2e0f0fda76f1b84806a36c53c2e270ce...	✓	1/9/2024 10:22 PM	Adobe F

Comments

Contract Title

Contract Manager ?

*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.	<ul style="list-style-type: none"> <li>• January 31</li> <li>• April 30</li> <li>• July 31</li> <li>• October 31</li> </ul>	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.	<ul style="list-style-type: none"> <li>• March 6</li> <li>• June 7</li> <li>• September 6</li> <li>• December 6</li> </ul>	N/A	KCICN

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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	<ul style="list-style-type: none"> <li>• January 31</li> <li>• April 30</li> <li>• July 31</li> <li>• October 31</li> </ul>	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: <ul style="list-style-type: none"> <li>• Required elements of the agencies DRBC program</li> <li>• Annual test of Information System (IS) system for data back-up and recovery</li> </ul>	January 31	N/A	KCICN, 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

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# 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

## ▼ Budget Details For This Contract

No records.

<b>Total Budget for This Contract</b>	\$170,000.00	<b>% of Contract Amount Budgeted</b>	100.00%
<b>Budget Remaining for This Contract</b>	\$170,000.00	<b>% of Budget Spent for This Contract</b>	0.00%

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

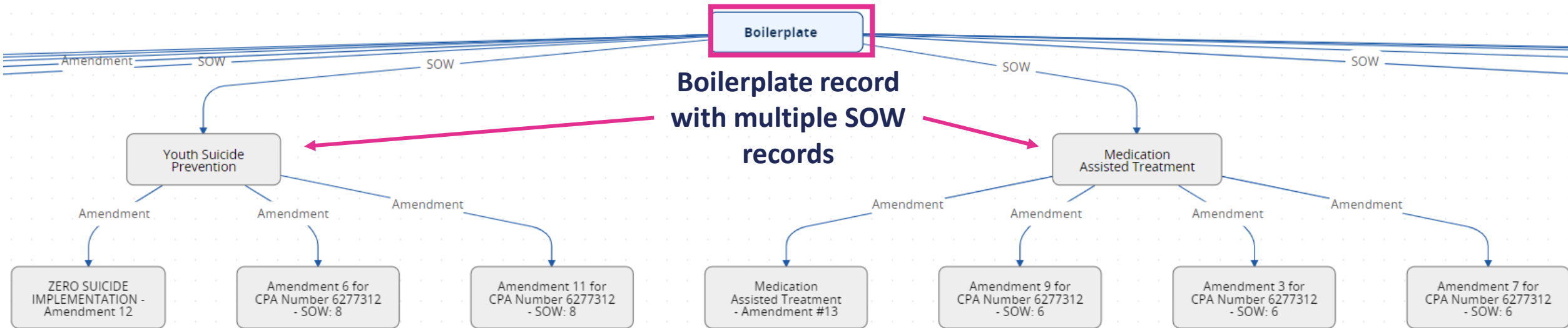
# Boilerplates and Statements of Work (SOW)

- 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

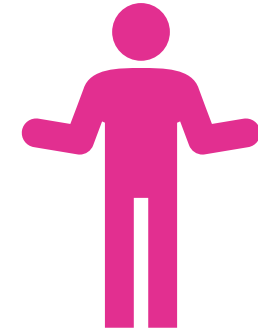
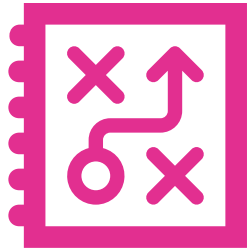
Click this icon on your contract table to see how each record is related to other records.



# 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](mailto: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 .*