



Managing Your Agiloft Accounts and Company Profile

For DCHS Contracted Providers

 King County

DCHS

Department of Community
and Human Services

Accessing Agiloft

URL to login to Agiloft: [Accessing Agiloft to apply for and manage contracts with DCHS - King County, Washington](#)

- Bookmark the URL for easy access
- Click on **Login** button to get started
- For first-time users, follow the instructions in your **welcome email**
- Step-by-step guides and video tutorials are available on the external website

Note: there are **no** Agiloft-specific passwords

- Use your registered Agiloft email as your username, and enter your email's password to log in.



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:

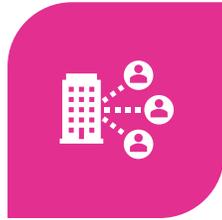
- Solicitation Events
- Contracting Process
- Invoice Processing



Agiloft provides a single system for providers to interact with DCHS



**MANAGE STAFF
ACCOUNTS AND
ACCESS**



**MAINTAIN
COMPANY PROFILE,
INCLUDING
LOCATIONS**



**UPLOAD COMPANY-
RELATED
DOCUMENTS AND
REPORTS**



**SEARCH FOR AND
APPLY TO
SOLICITATIONS
(FUNDING
OPPORTUNITIES)**



**ACCESS ACTIVE
CONTRACTS AND
RELATED
DOCUMENTS**



**SUBMIT AND
TRACK INVOICES
AND SUPPORTING
DOCUMENTATION**

Agiloft Terminology, Wayfinding, and Troubleshooting



Agiloft - DCHS

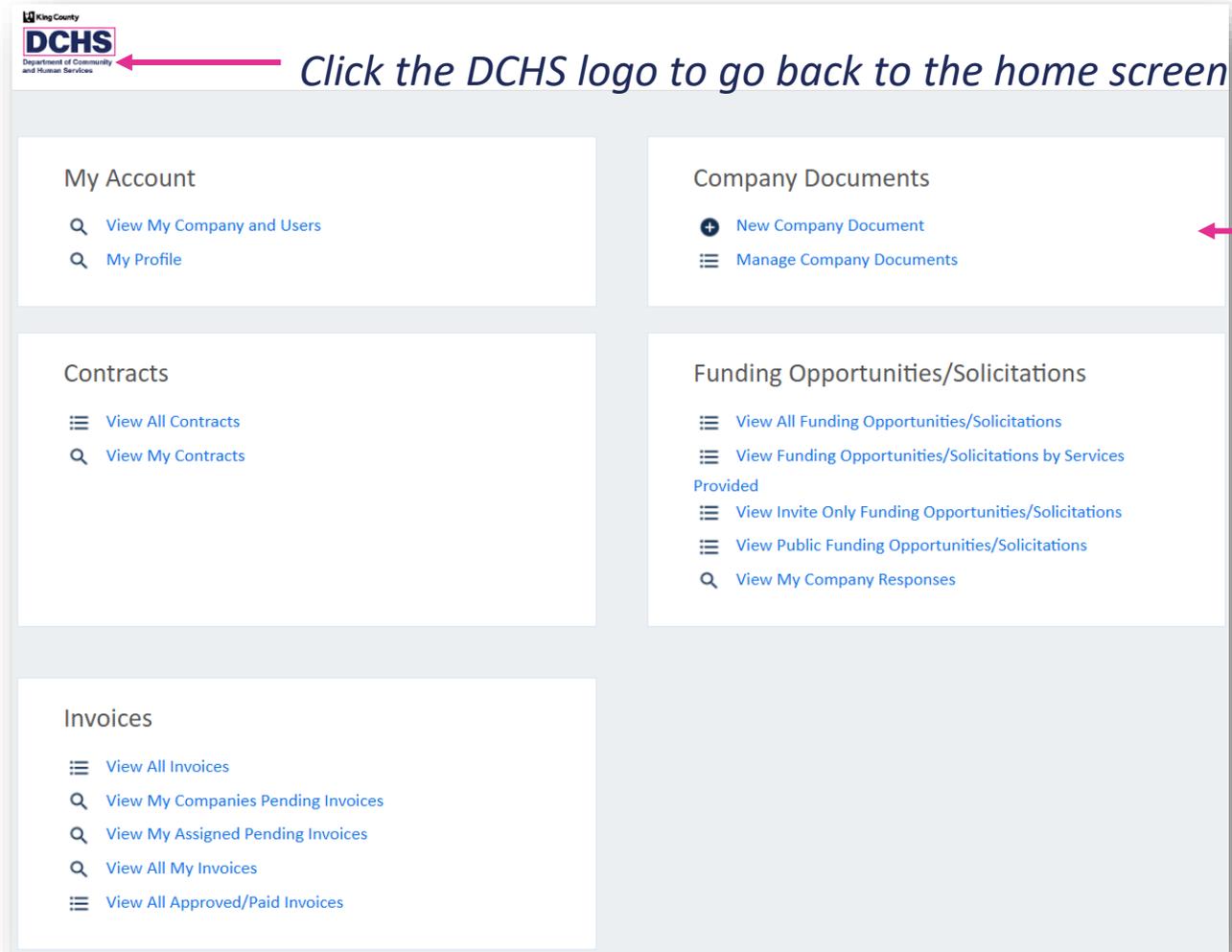
Agiloft - DCHS

 King County

DCHS

Department of Community
and Human Services

Agiloft End User Portal Home Screen



Tiles

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

Visibility and functionality depends on user account type.

Anatomy of a record in Agiloft

The screenshot shows a record page for 'Contract: Buying Cookies'. The top section is a 'COMMON AREA' containing various fields. A pink box labeled 'FIELDS' points to several of these fields. Below this is a 'STATUS / WORKFLOW BAR' with stages: Closed, Draft, Pending Review, With Counterparty, and Pending Approval. Below the bar is a 'TABS' section with tabs for Details, Attachments, Finance, Emails, Renewal / Related Contracts, Tasks and Obligations, and History. The 'Details' tab is active, showing 'SUBSECTIONS' for Requester Information and Contract Information.

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

STATUS / WORKFLOW BAR

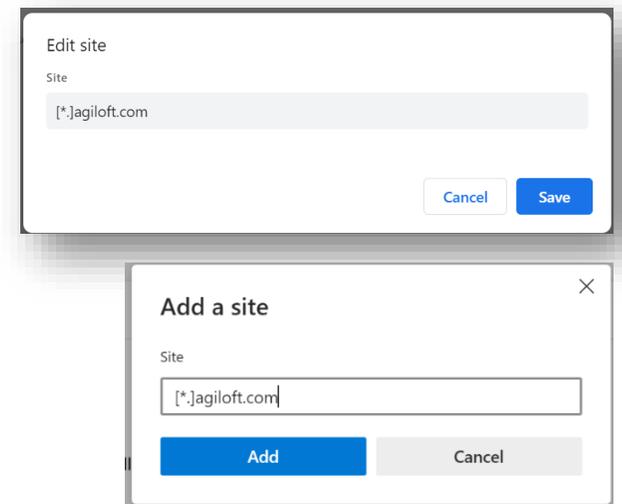
TABS

SUBSECTIONS

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`
 - CHROME: then click **Save**
 - EDGE: then click **Add**
5. Close the browser, and reopen. Your changes should now be active.

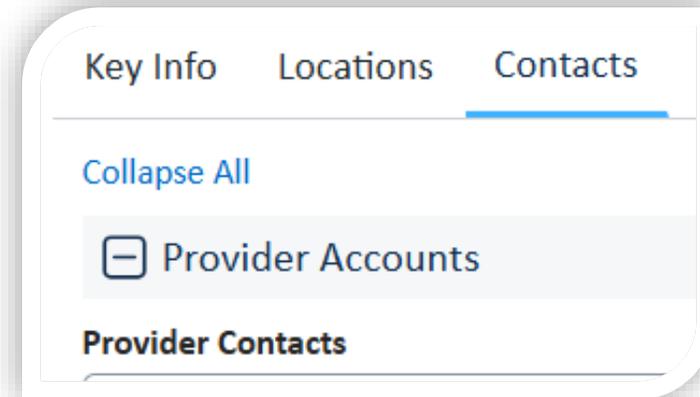


Make ContractingWithDCHS@KingCounty.gov a Safe Email

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



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 / 'User Groups' for providers

Provider Staff Account

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

Provider Finance Staff Account

- Can view and submit invoices
- Combine with Provider Staff Account group for broader access

Provider Account Manager (PAM)

- Can:
 - Create and manage other staff accounts
 - Maintain company profile
 - Same access as Provider Staff
 - Upload company documents, such as certificates of insurance and KC W-9s
- Does NOT have access to invoices by default (*add Finance Staff role if needed*)

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

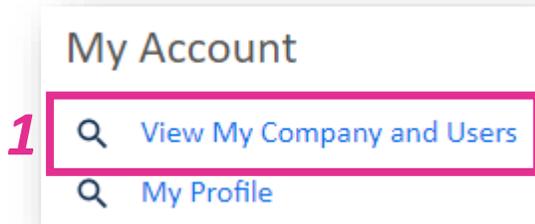
- An organization's **first** Provider Account Manager (**PAM**) account must be created by DCHS
 - See <https://kingcounty.gov/en/dept/dchs/human-social-services/funding-opportunities-dchs/agiloft> for more details

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** users

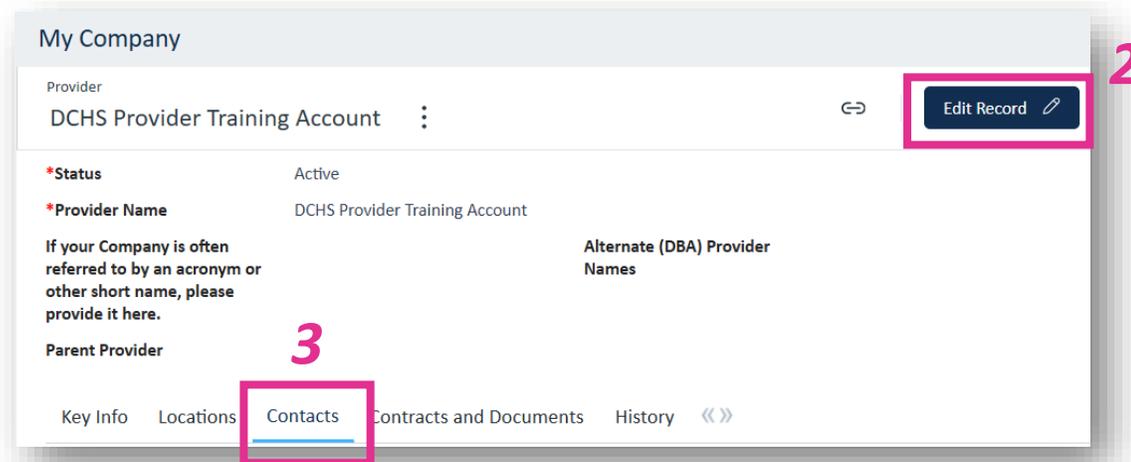
To view and manage staff accounts, navigate to the “My Account” tile



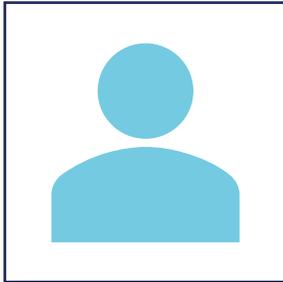
Users can view information about **their company and account** by clicking these links

To view and manage staff account:

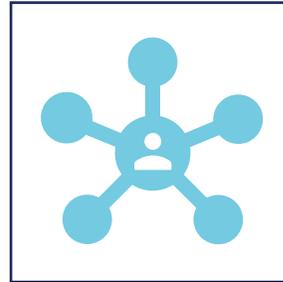
1. Click ‘View My Company and Users’ on ‘My Account’ tile
2. Click ‘Edit Record’
3. Click on the ‘Contacts’ tab



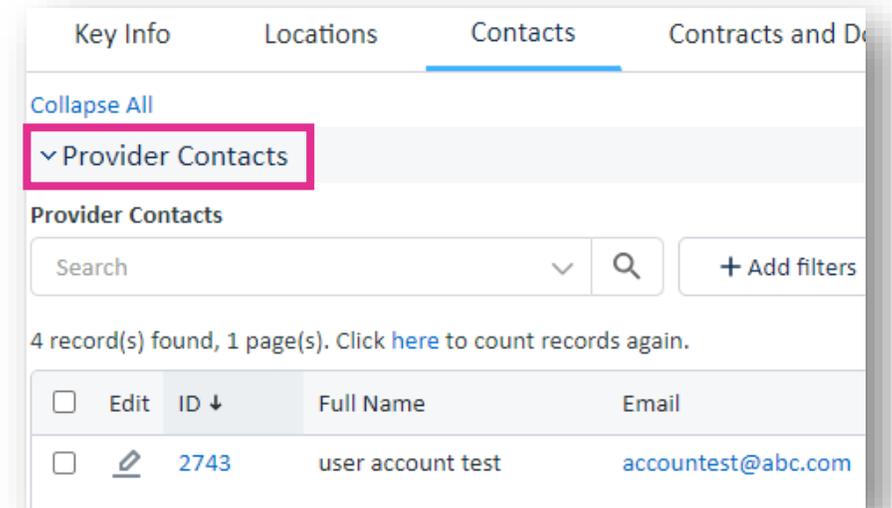
There are two tables of contacts



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



Key Info Locations **Contacts** Contracts and D

Collapse All

▼ Provider Contacts

Provider Contacts

Search [v] [Q] + Add filters

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

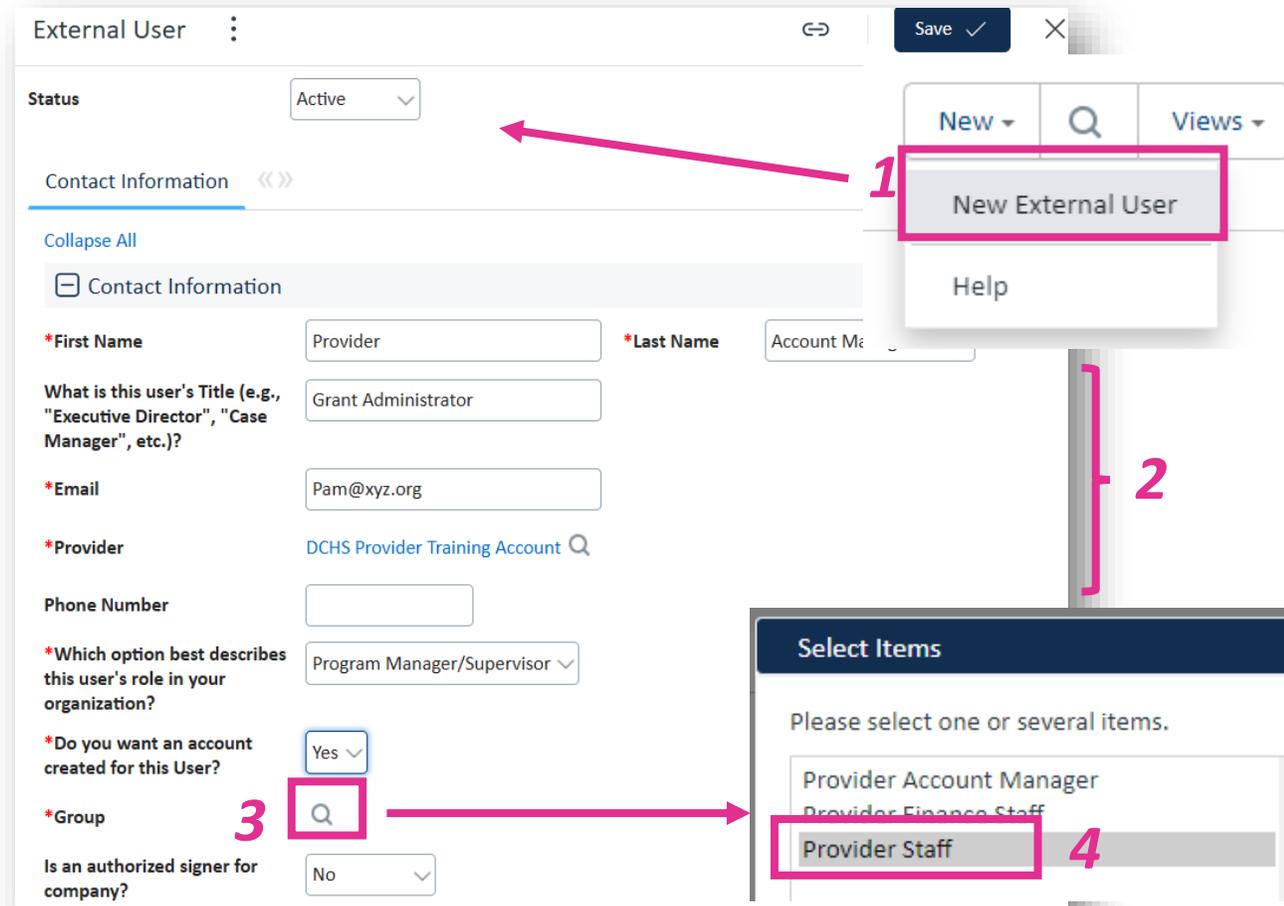
<input type="checkbox"/>	Edit	ID ↓	Full Name	Email
<input type="checkbox"/>		2743	user account test	accounttest@abc.com

▼ Additional Contacts Related to this Company

- This can be helpful to designate **authorized signers**, such as ED/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”)

Don't forget to be in “Edit” mode!



External User

Status: Active

Contact Information

*First Name: Provider

*Last Name: Account M...

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

*Email: Pam@xyz.org

*Provider: DCHS Provider Training Account

Phone Number:

*Which option best describes this user's role in your organization?: Program Manager/Supervisor

*Do you want an account created for this User?: Yes

*Group: [Search Icon]

Is an authorized signer for company?: No

New External User

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’

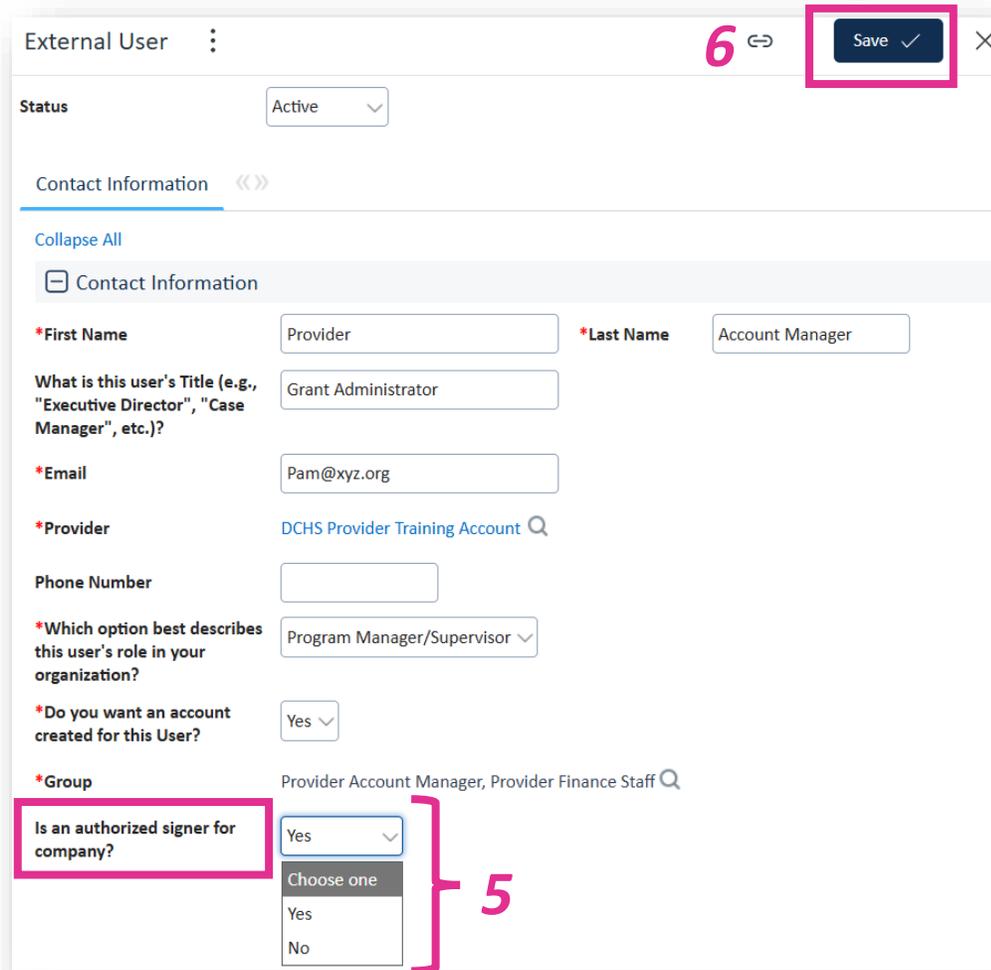
Continued on next slide...

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

Edit Record 

Don't forget to be in "Edit" mode!



External User 6 Save ✓

Status: Active

Contact Information

***First Name**: Provider ***Last Name**: Account Manager

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

***Email**: Pam@xyz.org

***Provider**: DCHS Provider Training Account

Phone Number:

***Which option best describes this user's role in your organization?**: Program Manager/Supervisor

***Do you want an account created for this User?**: Yes

***Group**: Provider Account Manager, Provider Finance Staff

Is an authorized signer for company?: Yes

Creating a new staff account, cont'd:

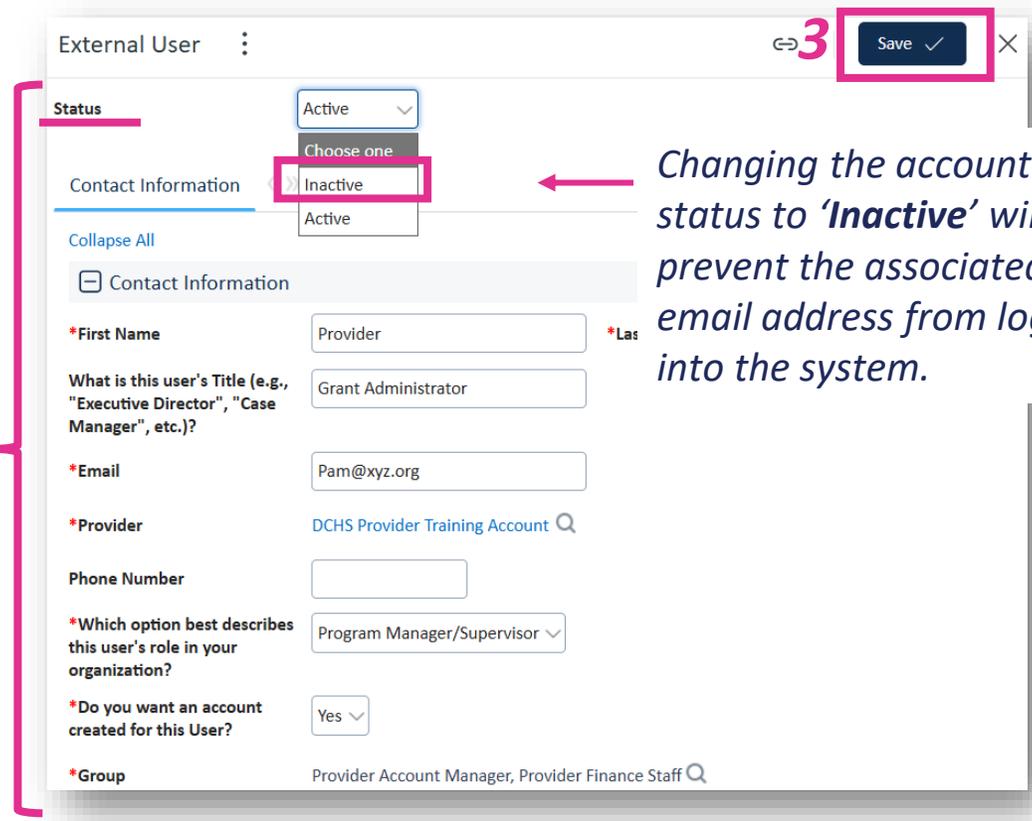
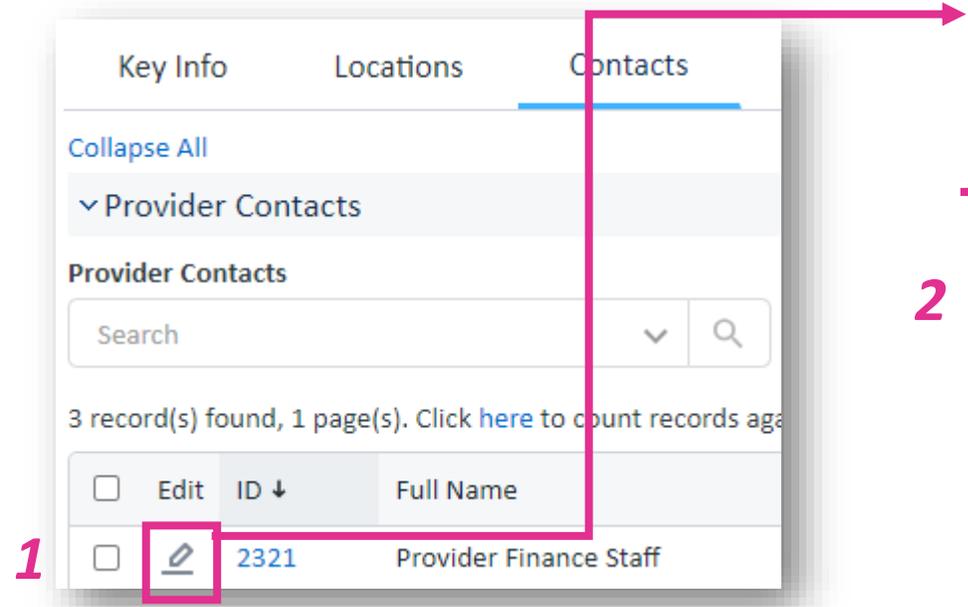
- Indicate whether the user is an **authorized signer** for your organization's contracts
 - Authorized signers can sign contracts on behalf of the agency
 - Any finance user can attest to and submit an invoice
- Click **'Save'** to close the record and send the person a welcome email

A PAM can edit or deactivate accounts associated with their provider

Don't forget to be in "Edit" mode!

To edit an account:

1. Click the edit "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

Key Info Locations Contacts Contracts and Documents

Collapse All

Key Info

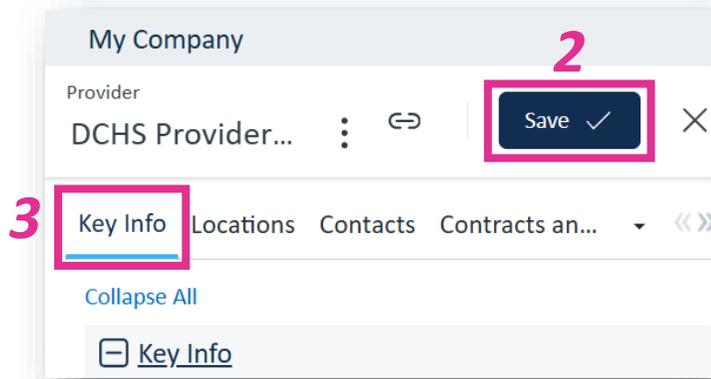
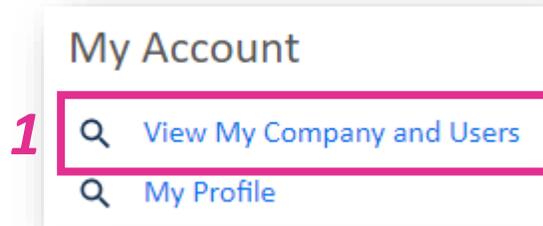
*Provider Type [?] Legal Entity

*Primary Role Vendor

*Tax ID 123456

Telephone Ext.

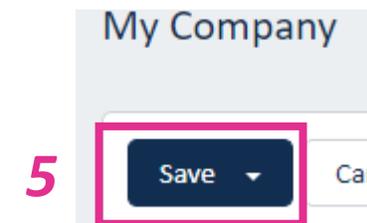
PAMs should complete and maintain company 'Key Info'



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

Fiscal Info

Provide requested information

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

When does your organization's fiscal year start? MM/dd/yyyy

Has your organization received prior federal funding?

Choose one

- Choose one
- Yes
- No
- Don't Know

Goods and Services

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

Choose one

- Choose one
- 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 to describe the 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 ↓ ₁	Services ↑ ₂
<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	ServSocCnv	Social connectedness

3

Background Information

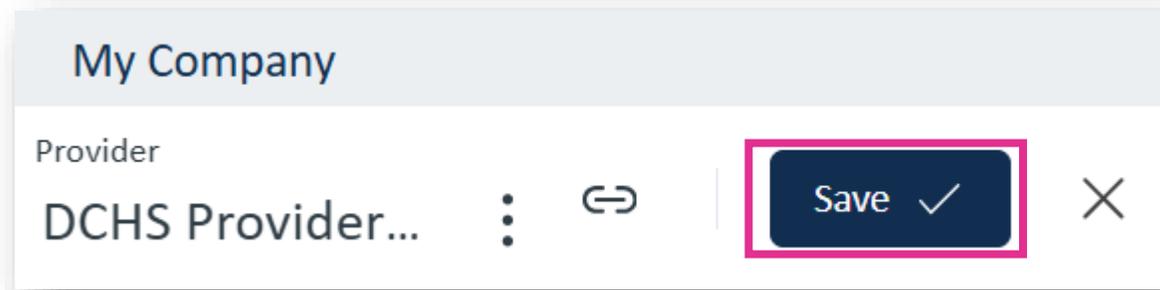
- The information in this section will **not** be used in funding award decisions
- These questions are being asked to better understand our provider partners and track changes over time when monitoring DCHS' efforts to support and sustain a diverse array of organizations at various stages of development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

Background Information

When was your organization established?	<input type="text" value="03/25/2014"/>	<input type="text" value=""/>	# of Employees	<input type="text" value="Choose one"/>
Do most (50%+) of your organization's direct service staff identify as Black, Indigenous, or People of Color?	<input type="text" value="Choose one"/>	<input type="text" value=""/>	Do most (50%+) of your organization's managers/directors/ED identify as Black, Indigenous, or People of Color?	<input type="text" value="Choose one"/>
Do most (50%+) of your organization's Board members identify as Black, Indigenous, or People of Color?	<input type="text" value="Choose one"/>	<input type="text" value=""/>	Does your organization's mission statement and/or programs aim to predominately serve BIPOC communities?	<input type="text" value="Choose one"/>

Provide requested information

At any time, you can 'Save & Continue'

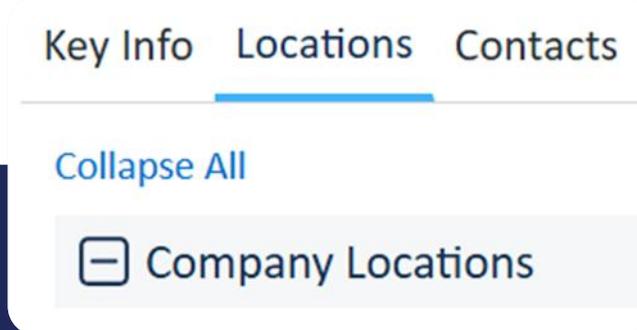


Clicking 'Save' will save newly added information and close record.



Maintaining Your Company's 'Locations' Tab

Critical information for contracting and reporting



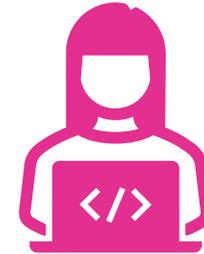
Please maintain your location information!

- 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



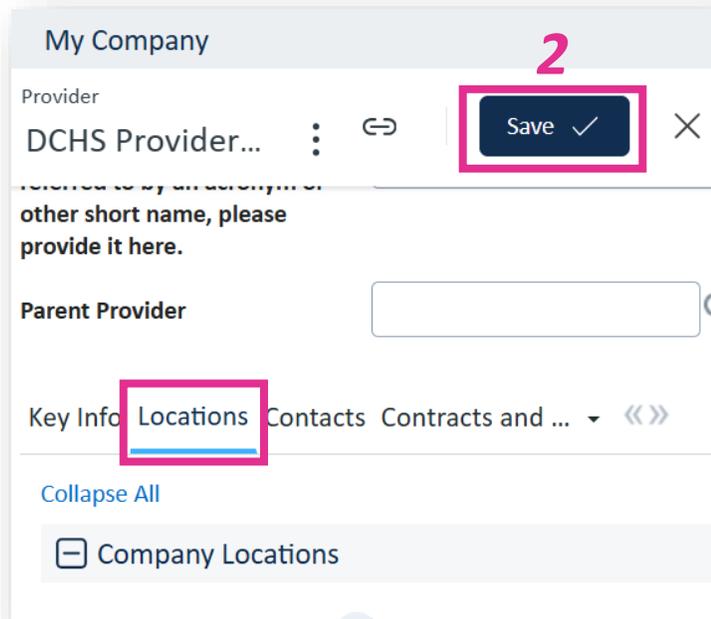
PAMs can create location records on the 'Locations' tab

My Account

- 1  View My Company and Users
-  My Profile

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'



My Company

Provider
DCHS Provider... 

other short name, please provide it here.

Parent Provider

3 Key Info **Locations** Contacts Contracts and ... 

Collapse All





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.

Save Cancel Location

ID 1922
Company Name DCHS Provider Training Account

5a

*Location Name

5b

5c

*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

5d

- 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

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.

Save ✓

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

Key Info **Locations** Contacts Contracts and Documents **Save ✓**

Collapse All

▼ Company Locations

+ Add filters

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

<input type="checkbox"/>	Edit	ID ↓	Location Name	Location Type
<input type="checkbox"/>		1920	1234 DCHS Ave	Services
<input type="checkbox"/>		1919	Primary Location	Headquarters

Main Location Primary Location ▼

Main City 1234 DCHS Ave
Primary Location

Main Country United States

Uploading Contract Related Documents

My Account Tile

Key Info Locations Contacts Contracts and Documents

[Expand All](#)

- + Contracts
- + Contract Management Files
- + Provider Documents

+ Provider Documents

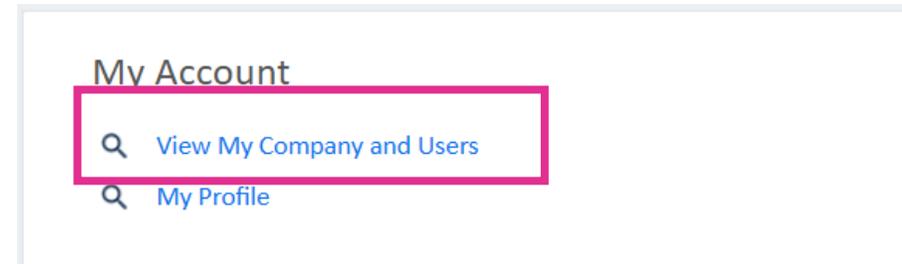
Documents such as subcontracts, aggregate, and narrative reports, etc. can now be uploaded via Agiloft



You can now upload contract related documents requested for your contract.



Ability to associate an attachment with a contract record



Choose the contract record and attachment type being uploaded

Click the “+” icon to expand and view details

My Company

Provider
DCHS Provider Training Account

Key Info | Locations | Contacts | **Contracts and Documents** | Hist

Expand All | Collapse All | Default View

+ Contracts

[-] Contract Management Files

Contract ID for Provider Attachments

Provider Attachment Type

Provider Attachment

- Aggregate reporting data
- Annual narrative reporting information
- Client Success Stories
- General Ledger
- Performance Bond
- Subcontract

Add Contract Management Files

Step 1: Associate the attachment with the contract record (**only active contracts are available for selection**)

Step 2: Select the Attachment type from the dropdown

Step 3: Upload your file or drag and drop

Step 4: Click Add Contract Management Files

Uploading Company-Related Documents and Reports

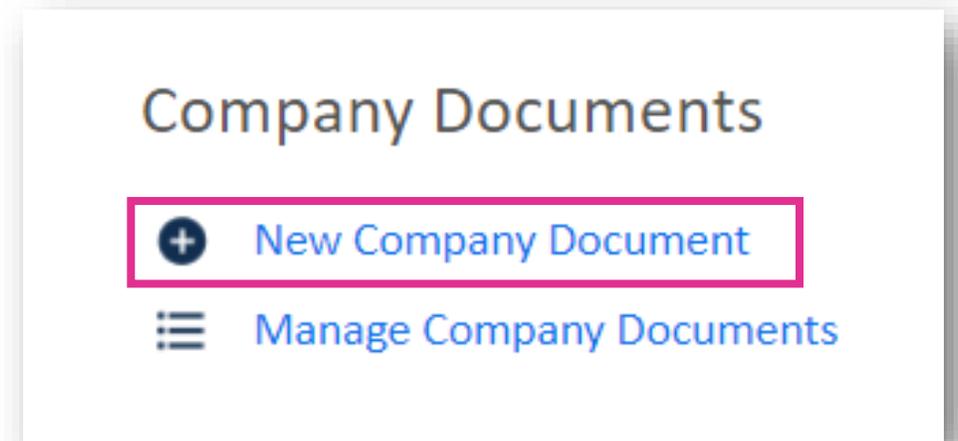
Company Documents

- + [New Company Document](#)
- ☰ [Manage Company Documents](#)

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. They do not just need to be MS Word or text files.

Choose the type of document being uploaded

New Company Document

Provider Documents
for DCHS Provider Training Account

Save ✓

*Type of Document

Type of Document - Category

Details <<>>

Collapse All

Document Details

Note: To protect your organization

*Upload File

Comments

- Audited Financial Statement
- BHRD Clinician Roster
- BHRD Closure Dates Report
- BHRD Data Certification Letter
- BHRD DRBC Attestation
- BHRD DRBC Plan
- BHRD Provider Profile Update
- BHRD Third Party Payment Report
- BHRD Weekly Provider Capacity Report
- Determination of Ongoing Status
- Endorsement of Additional Insured
- Federal Indirect Rate Determination
- Financial Management Training Form
- Financial Reporting Package
- Fiscal Sponsorship Agreement
- Insurance Certificate
- IRS Tax Determination Letter
- Licensing Information
- Other document type

Find and attach the file—be thoughtful about the name

New Company Document

Provider Documents

for DCHS Provider Training Account

Save ✓

*Type of Document

Type of Document - Category

Details <<>

Collapse All

Document Details

Note: To protect your organization's financial information, DO NOT upload ACH forms to Agiloft. Please

*Upload File

Attach/Manage

Drag and drop files

Comments

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

New Company Document

Attachments

Attachments: 0 Files

Attach File(s)

Open

Jennifer - King County > Downloads

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			
0c2e0f0da76f1b84806a36c53c2e270ce...	✓	1/9/2024 8:22 PM	Adobe A

File name:

Open

Finish

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

Chapter 1 Introduction

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"> • 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.	<ul style="list-style-type: none"> • March 6 • June 7 • September 6 • December 6 	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"> • 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: <ul style="list-style-type: none"> • Required elements of the agencies DRBC program • Annual test of Information System (IS) system for data back-up and recovery 	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

Contracts

☰ [View All Contracts](#)

🔍 [View My Contracts](#)

 King County

DCHS

Department of Community
and Human Services

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
- 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.

Total Budget for This Contract	\$170,000.00	% of Contract Amount Budgeted	100.00%
Budget Remaining for This Contract	\$170,000.00	% of Budget Spent for This Contract	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



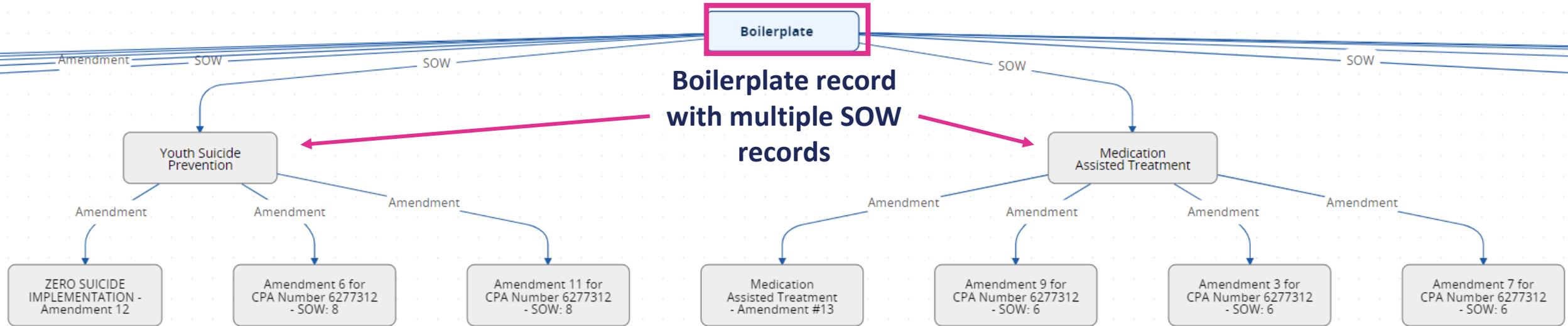
Final contract documents are sent for signature via DocuSign

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

Example: Boilerplate with multiples SOWs

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



- *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

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