Managing Your Agiloft Accounts and Company Profile

For DCHS Contracted Providers

King County
DCHS
Department of Community and Human Services

Last Updated: 03/31/2026

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

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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

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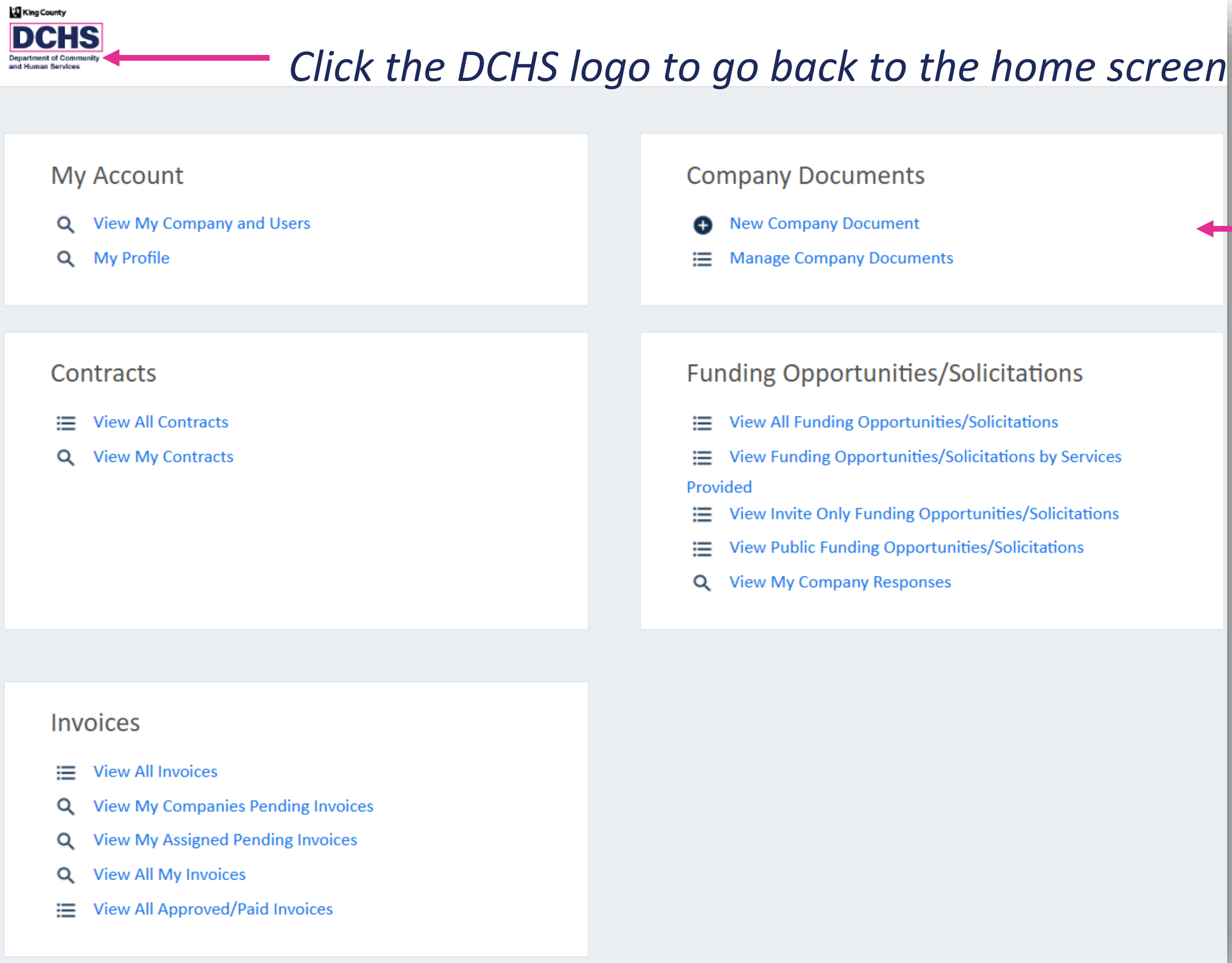
Agiloft End User Portal Home Screen

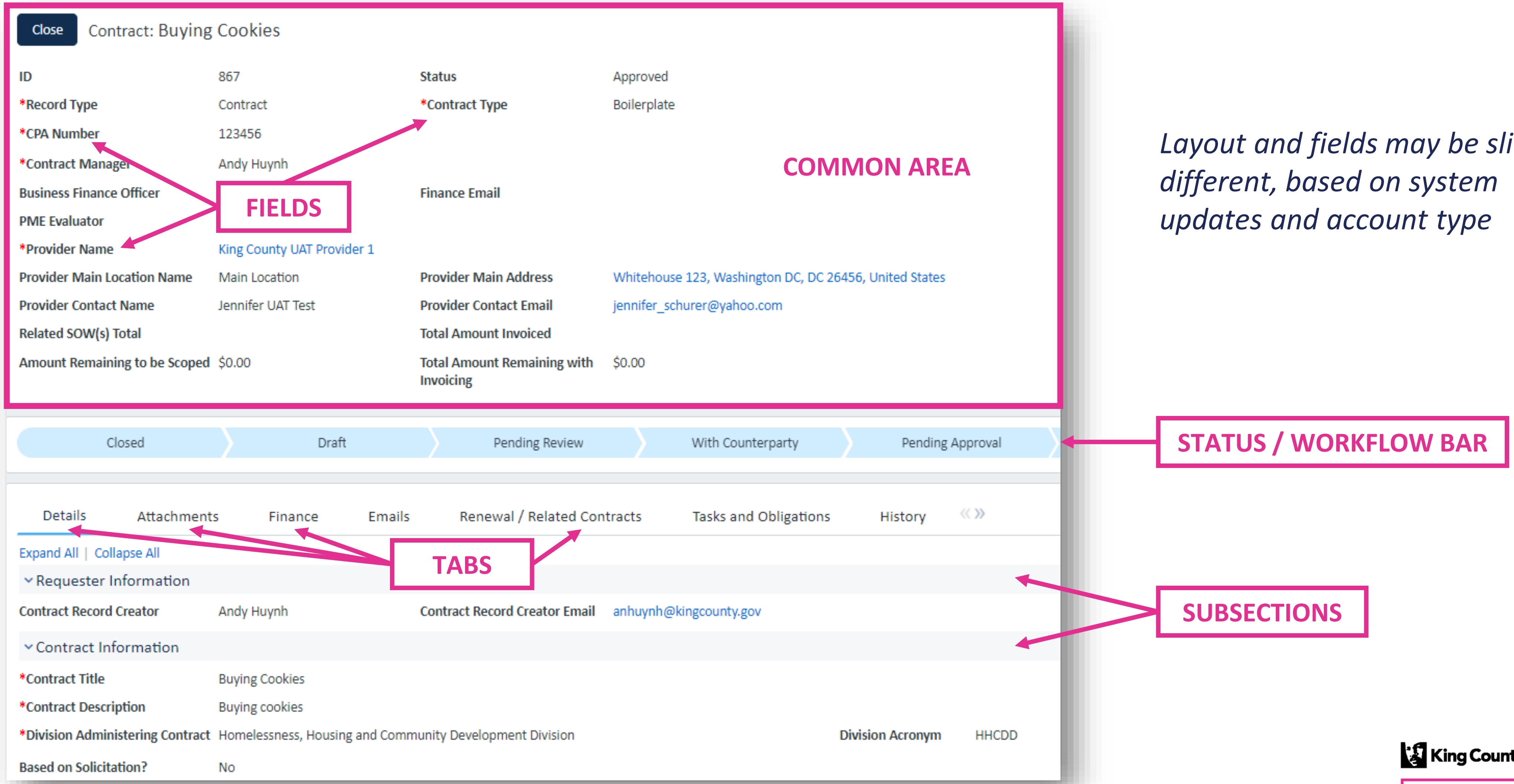


Tiles

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

Visibility and functionality depends on user account type.

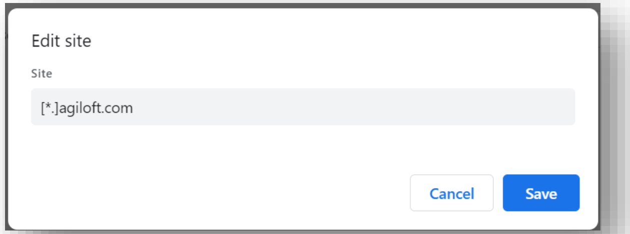
Anatomy of a record in Agiloft

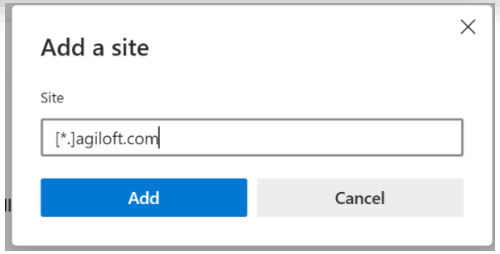


Layout and fields may be slightly different, based on system updates and account type

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.



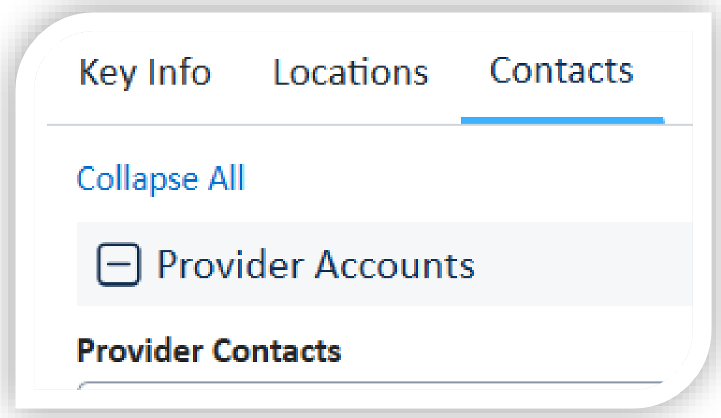


Make ContractingWithDCHS@KingCounty.gov a Safe Email

- **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



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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)*

🔑 **Quick Tip:** Need both access? → Combine **Provider Finance Staff** + **Provider Staff** or **PAM** + **Provider Finance Staff**

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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

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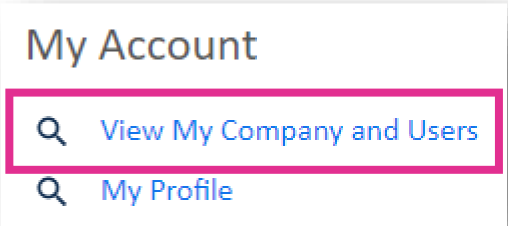
–OR– Submit information to DCHS to become a Provider Account Manager

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

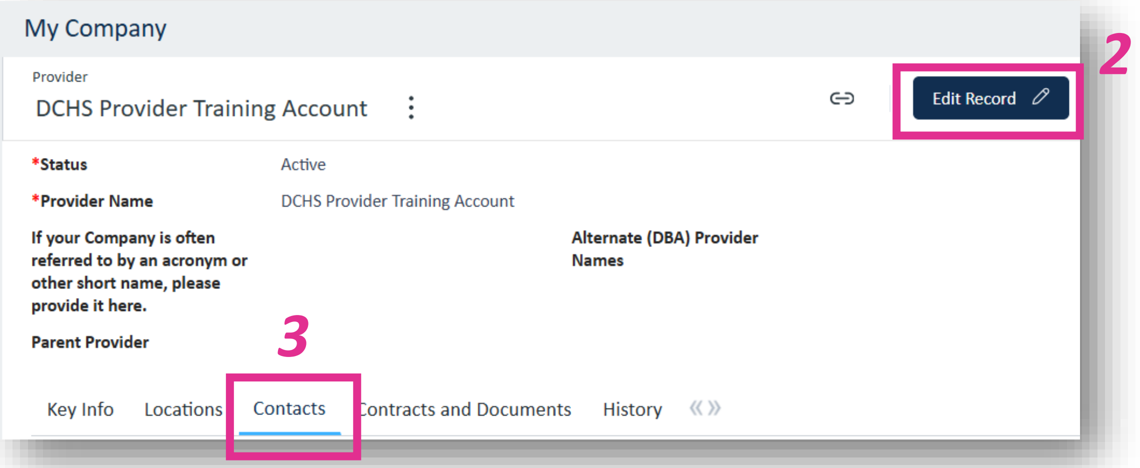
To view and manage staff accounts, navigate to the “My Account” tile



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*



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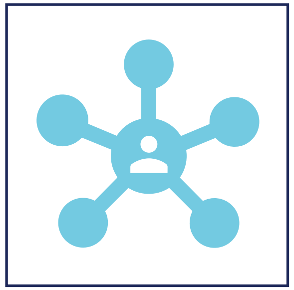
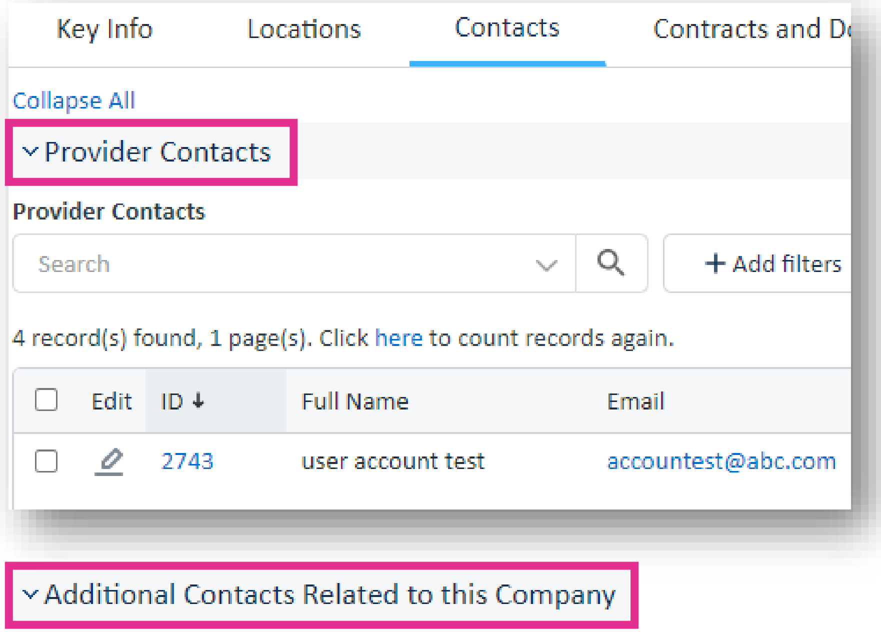
There are two tables of contacts

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 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

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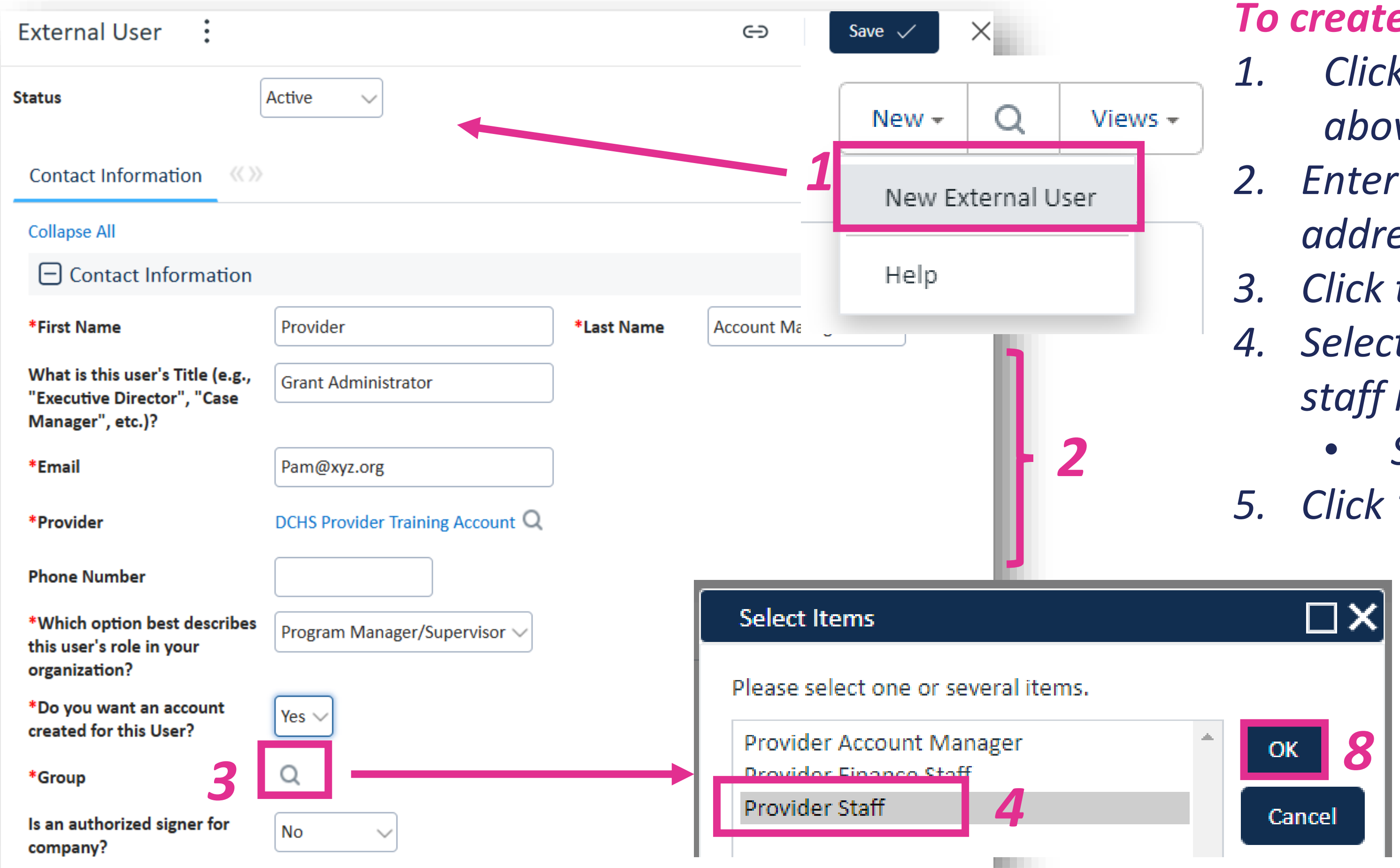
Only PAMs can create and manage accounts for other provider staff ("Provider Contacts")

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



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***

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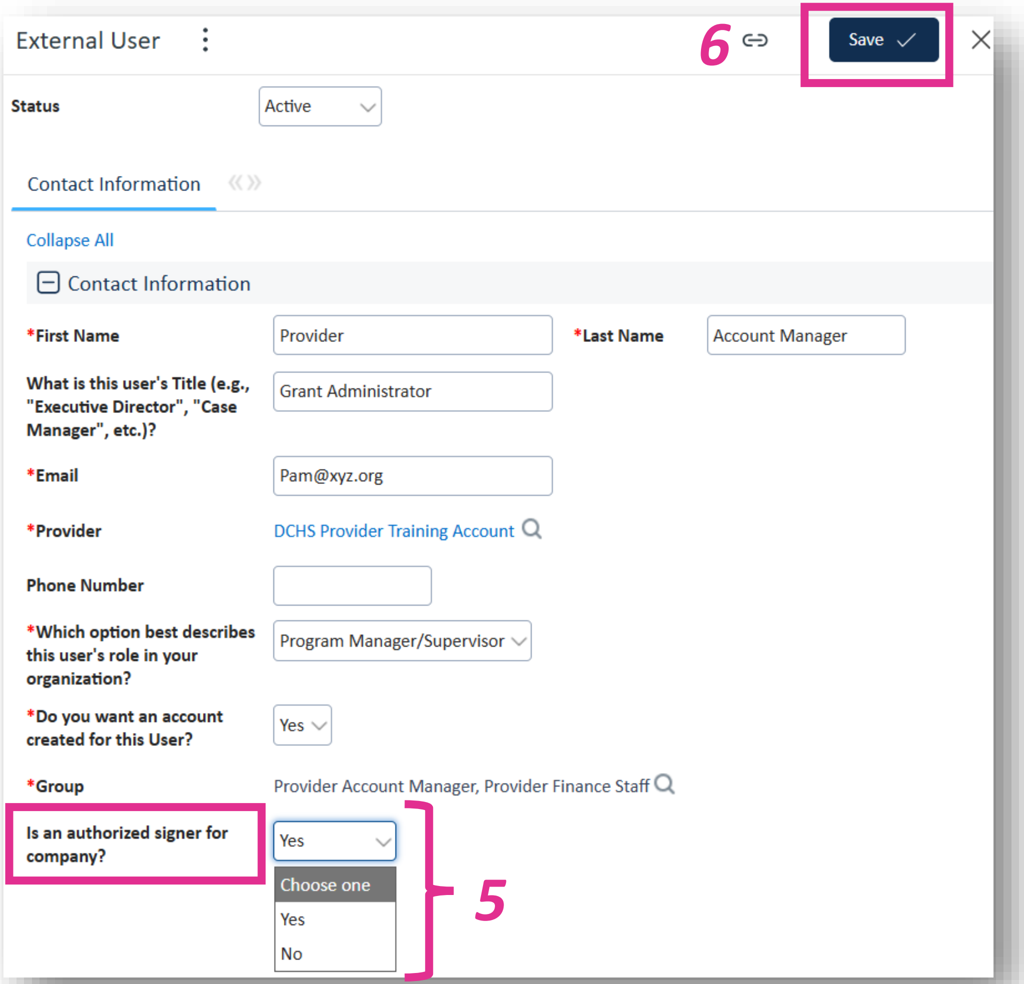
Choose whether the person can sign contracts for the agency, then Save



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

Creating a new staff account, cont'd:

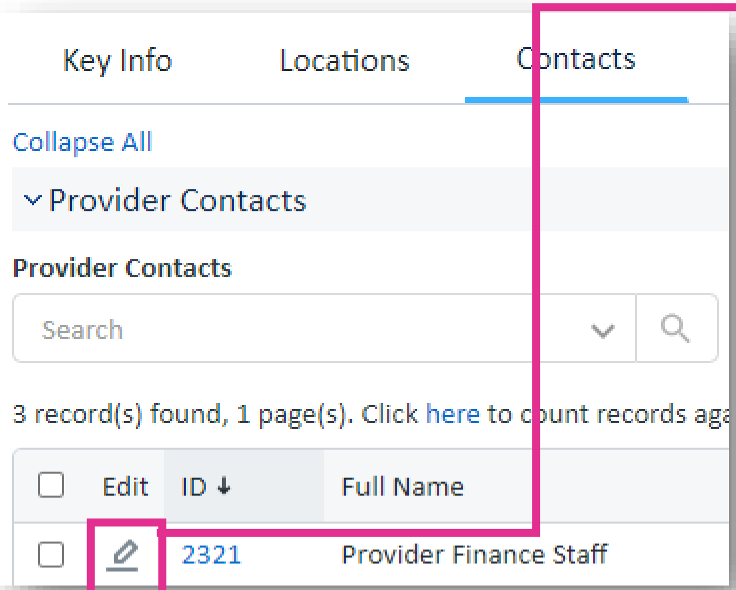
5. *Indicate whether the user is an **authorized signer** for your organization's contracts*
   - *Authorized signers can sign contracts on behalf of the agency*
   - *Any finance user can attest to and submit an invoice*
6. *Click '**Save**' to close the record and send the person a welcome email*

A PAM can edit or deactivate accounts associated with their provider

*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**'*



1

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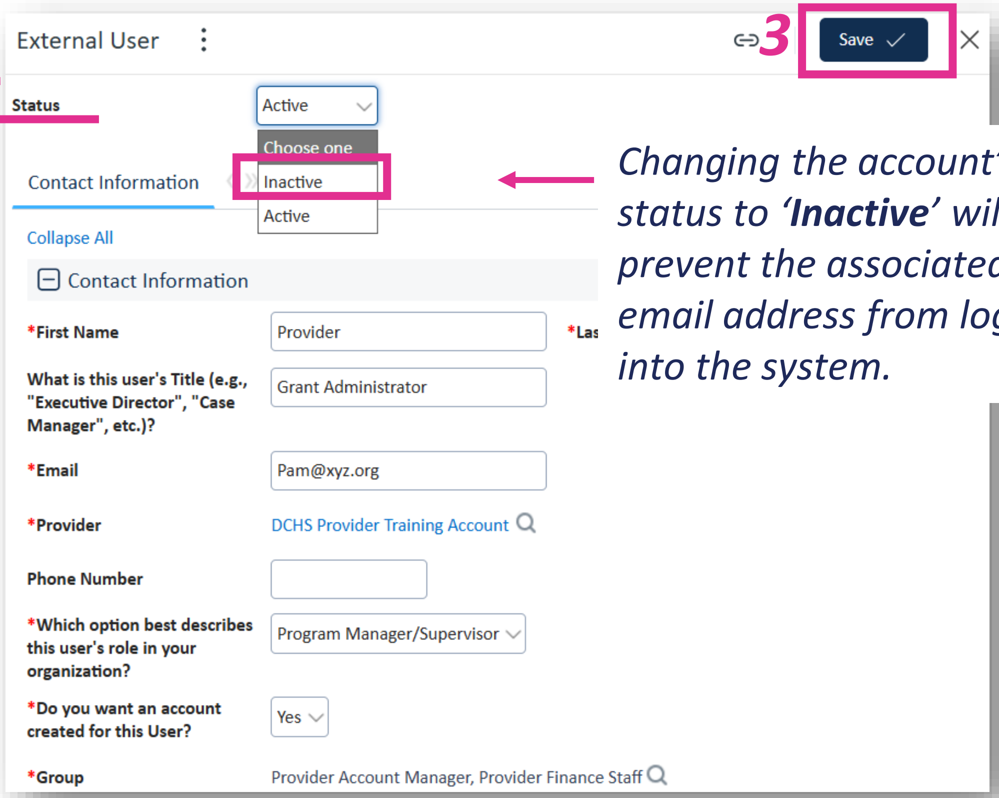

*Changing the account's status to '**Inactive**' will prevent the associated email address from logging into the system.*

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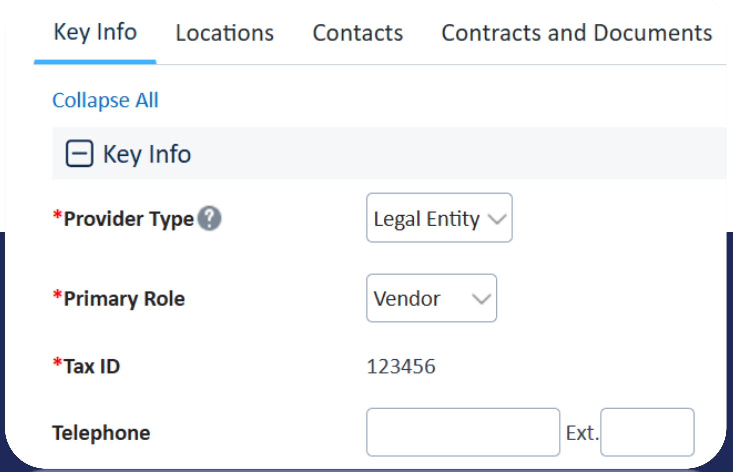

Maintaining Your Company’s ‘Key Info’ Tab

Critical information for contracting and reporting

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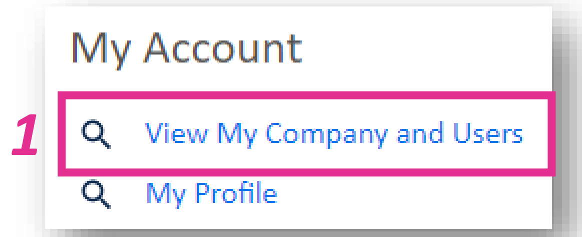
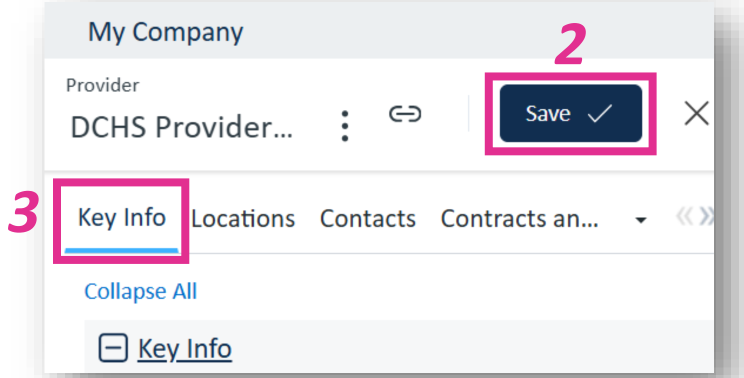
PAMs should complete and maintain company 'Key Info'

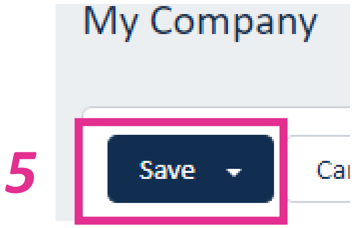




To edit company information or locations:

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



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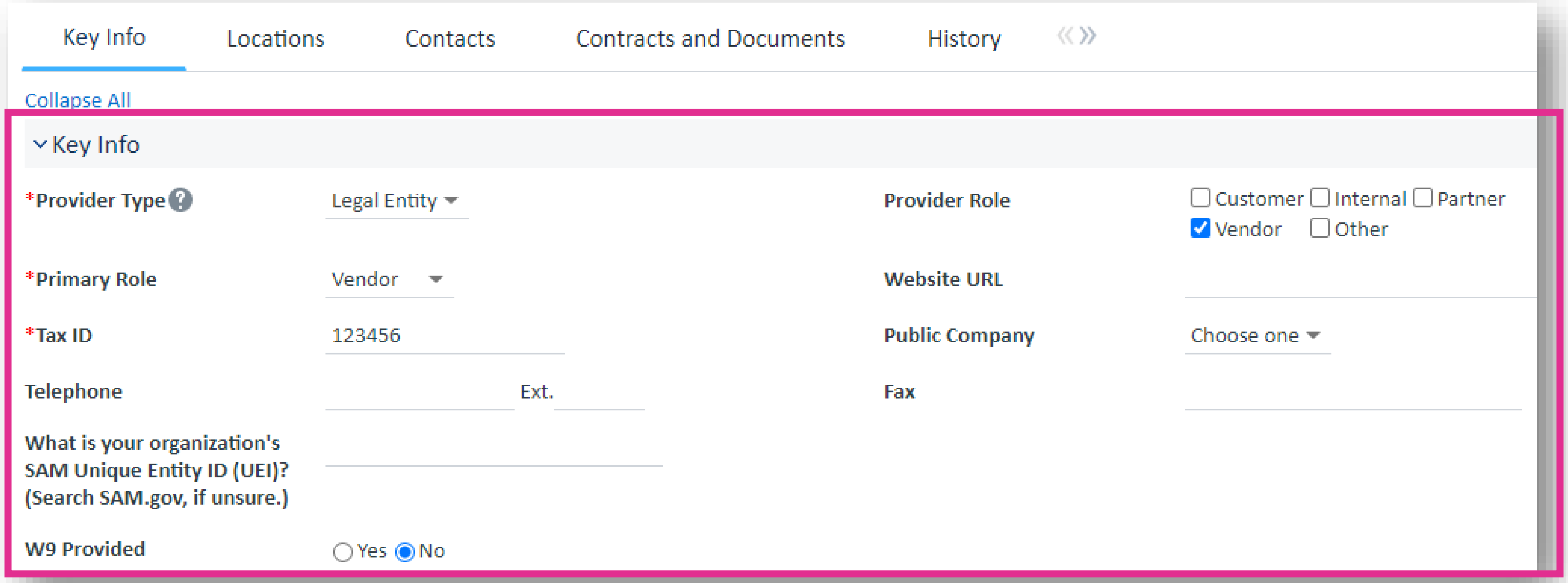
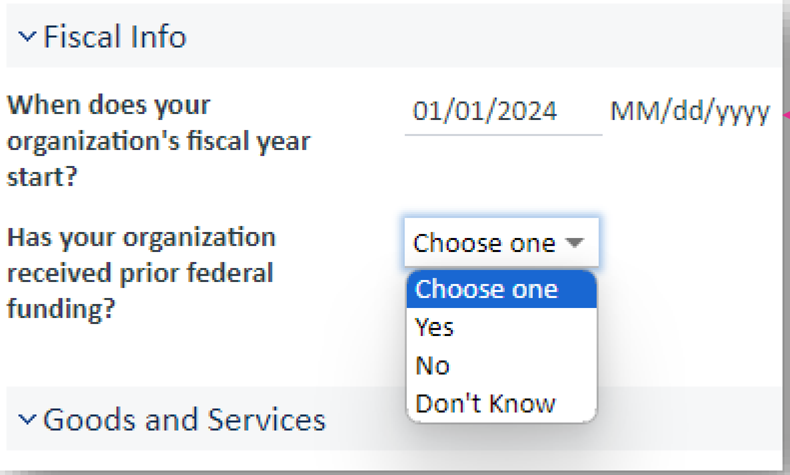
Key Info

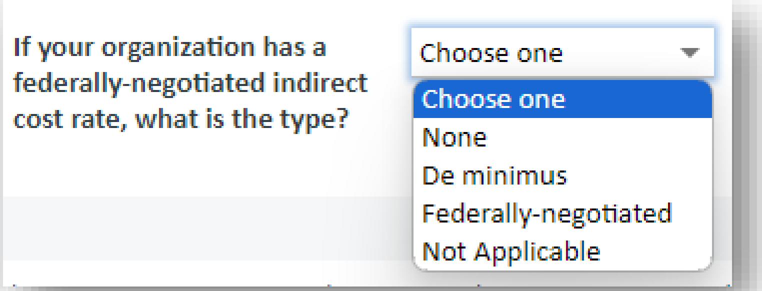

Key Info
Locations
Contacts
Contracts and Documents
History
Collapse All
Key Info
*Provider Type
Legal Entity
Provider Role
Customer
Internal
Partner
Vendor
Other
*Primary Role
Vendor
Website URL
*Tax ID
123456
Public Company
Choose one
Telephone
Ext.
Fax
What is your organization's SAM Unique Entity ID (UEI)? (Search SAM.gov, if unsure.)
W9 Provided
Yes
No

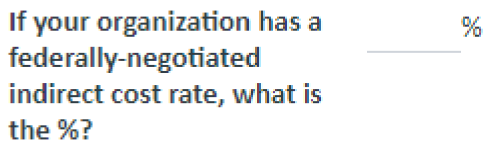
Fiscal Info

Provide requested information



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





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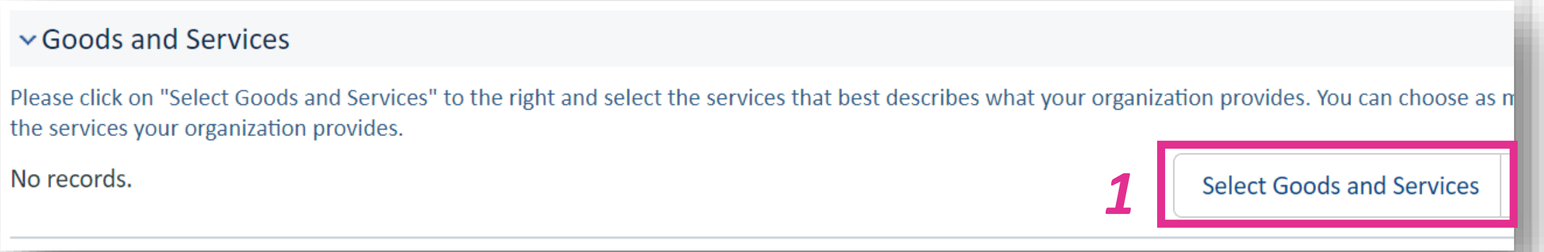
Goods and Services

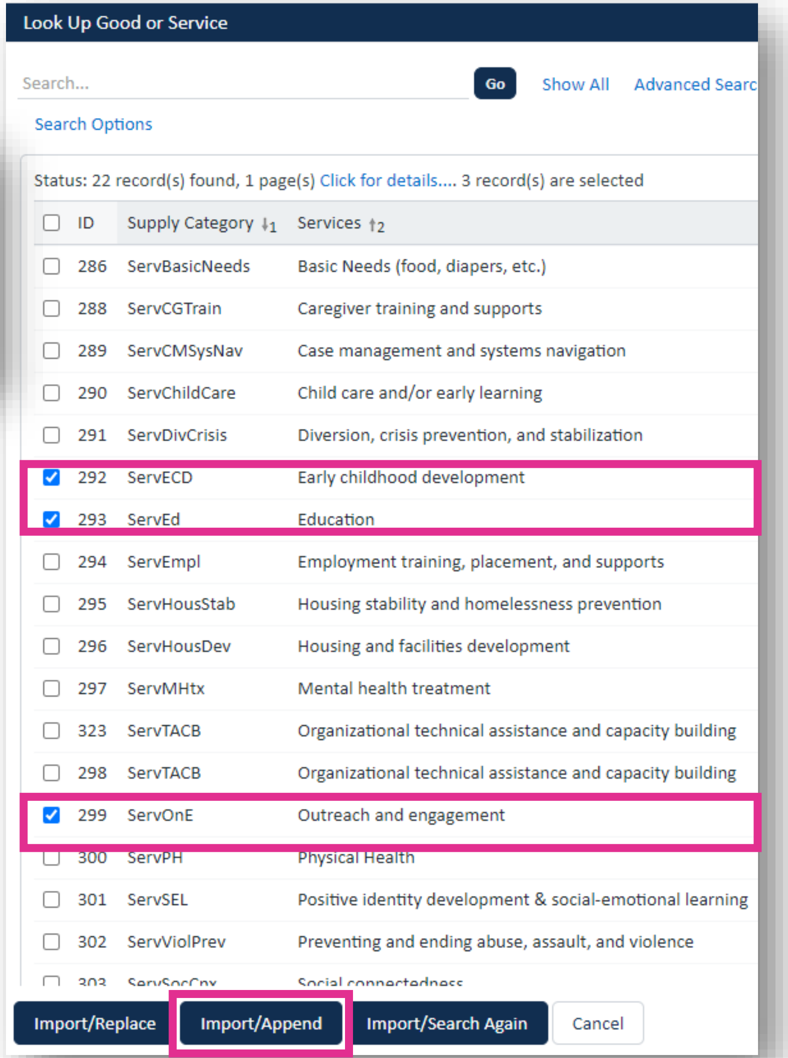


- Goods and Services is a new concept DCHS is using to better understand our investments and provider base and the service array they support

- 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



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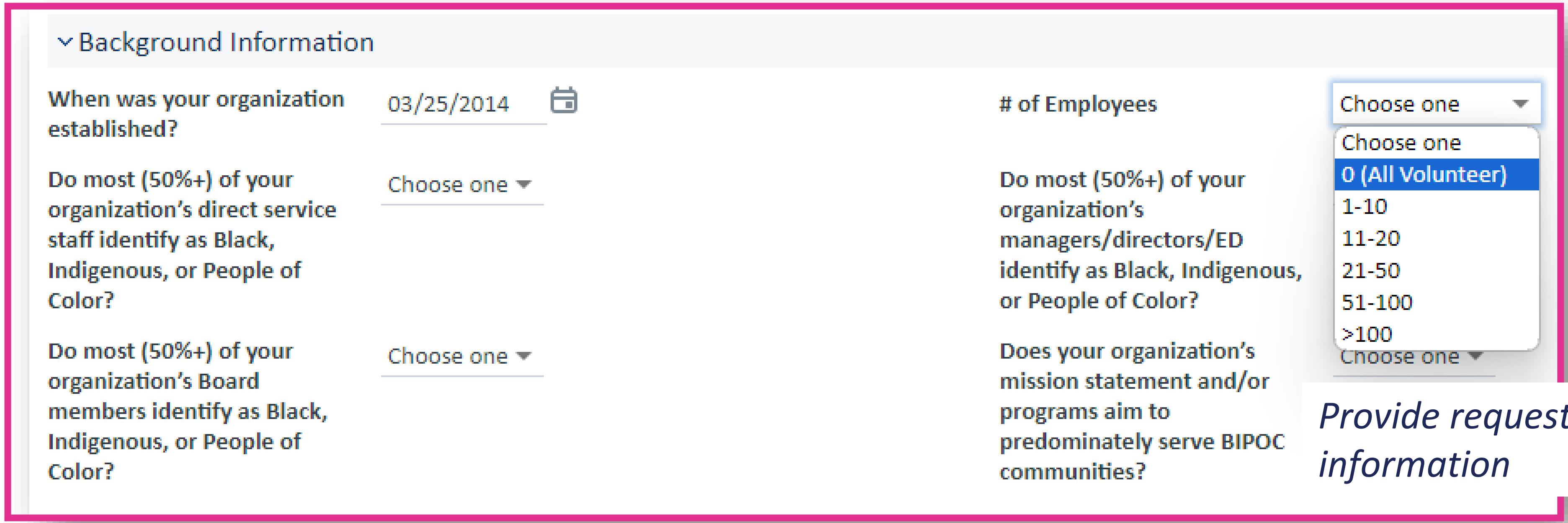
Background Information

- 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



Provide requested information

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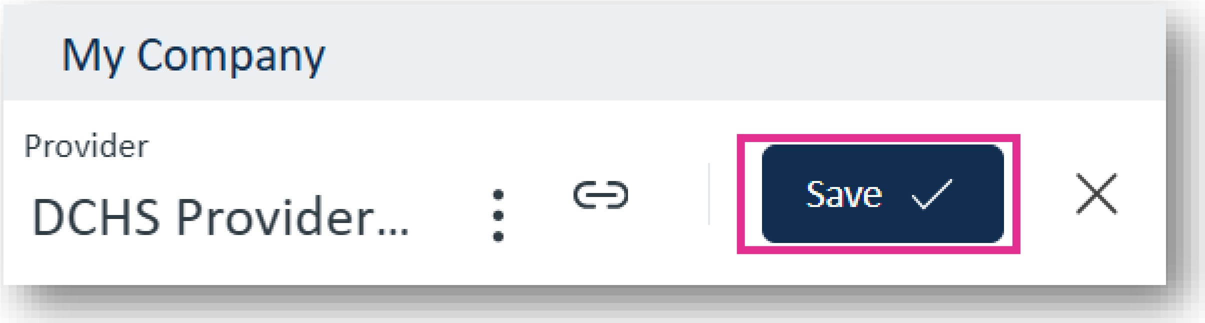
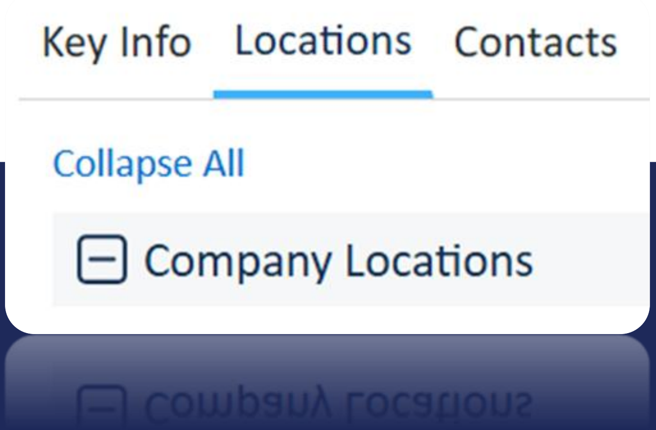
At any time, you can ‘Save & Continue’



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

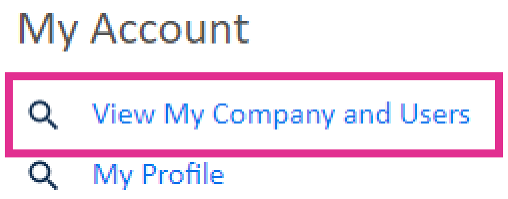
Which locations should you include?

- 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

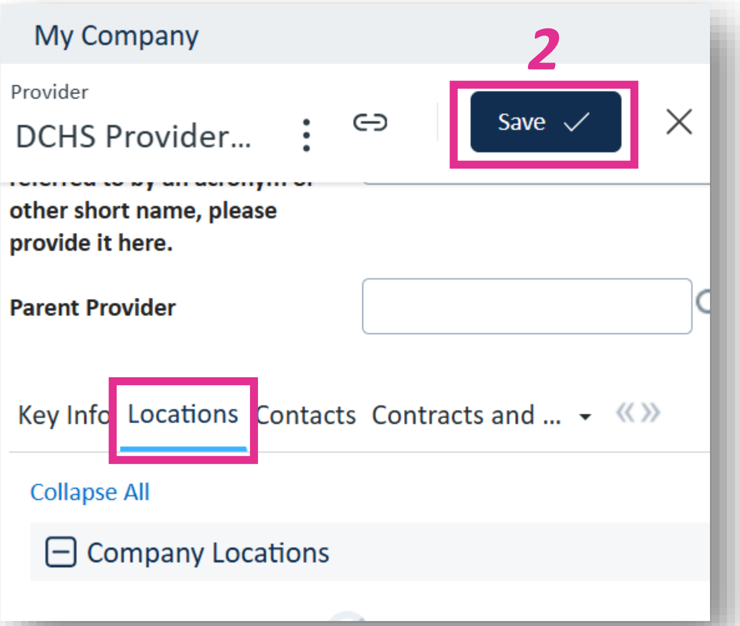
1



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**’*

3



4

5 *See details on following slides*

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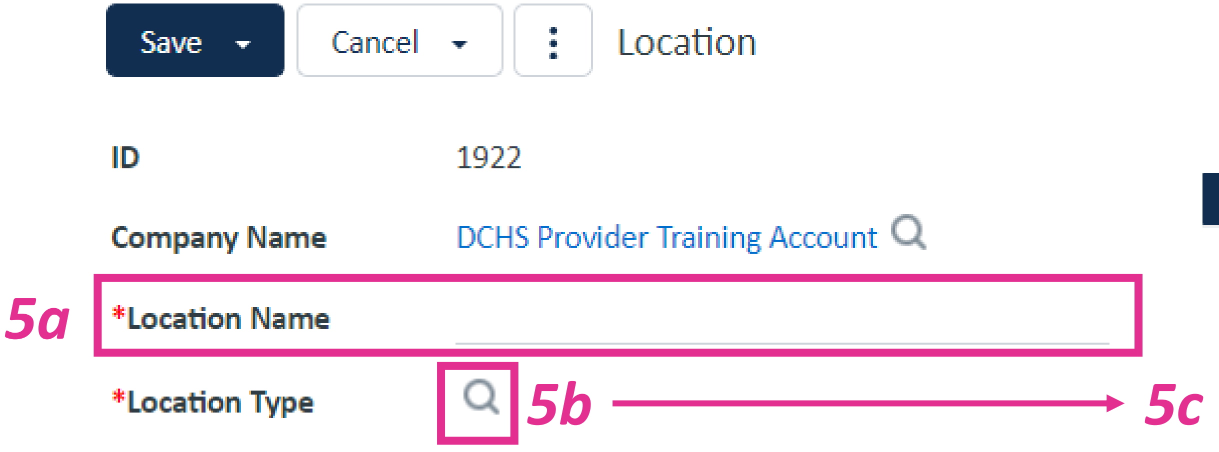
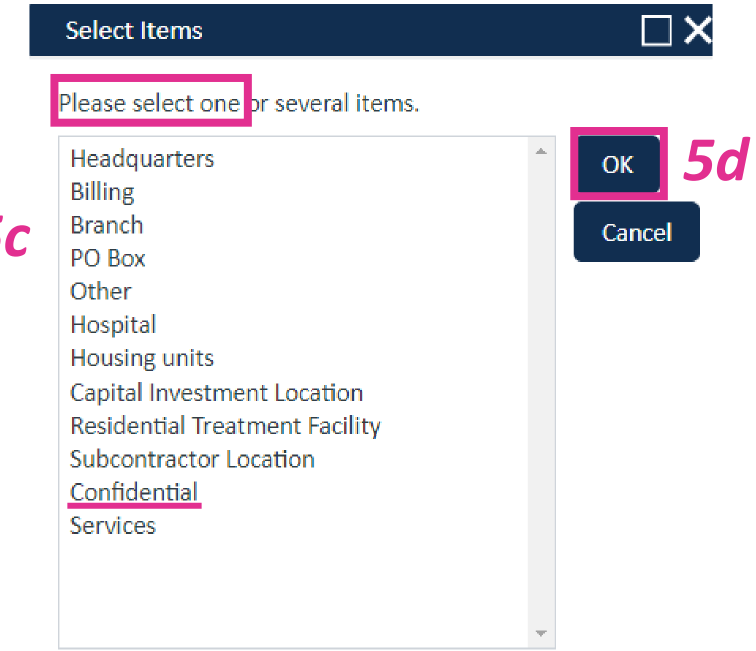
Provide the location's name and select a type

*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.*

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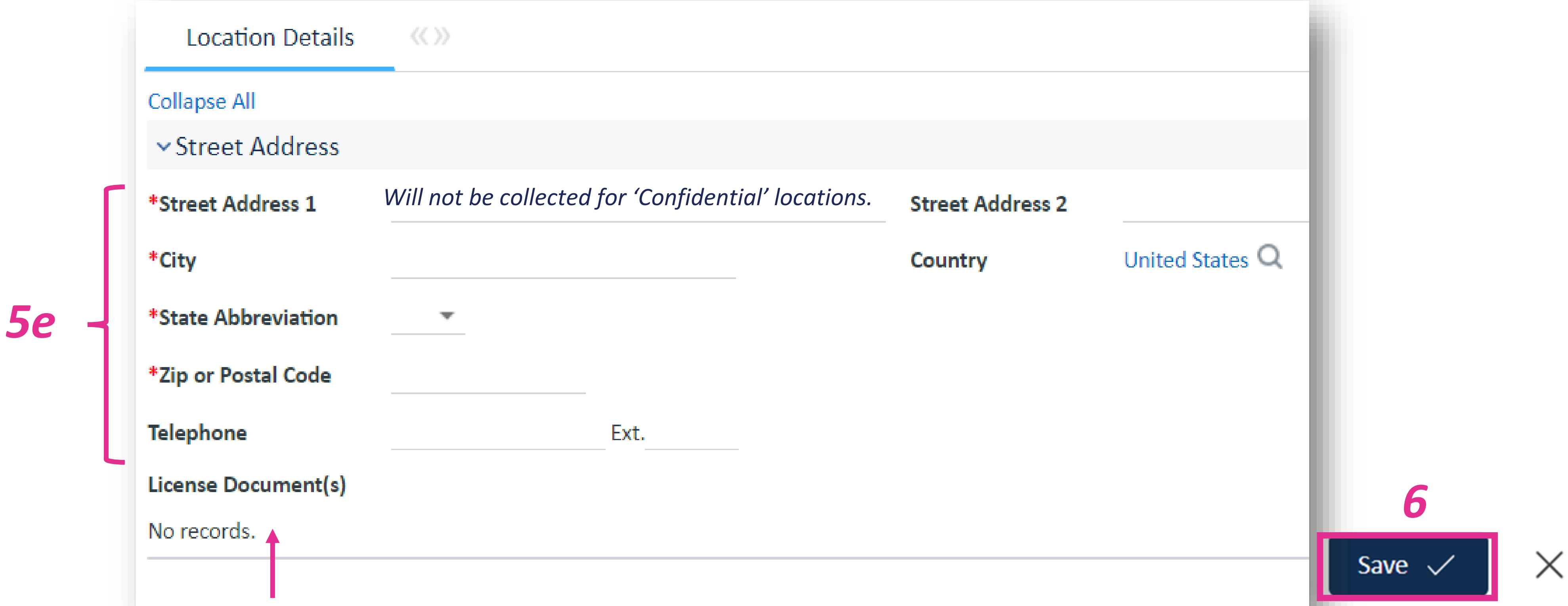
Provide the location's address, then 'Save'



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

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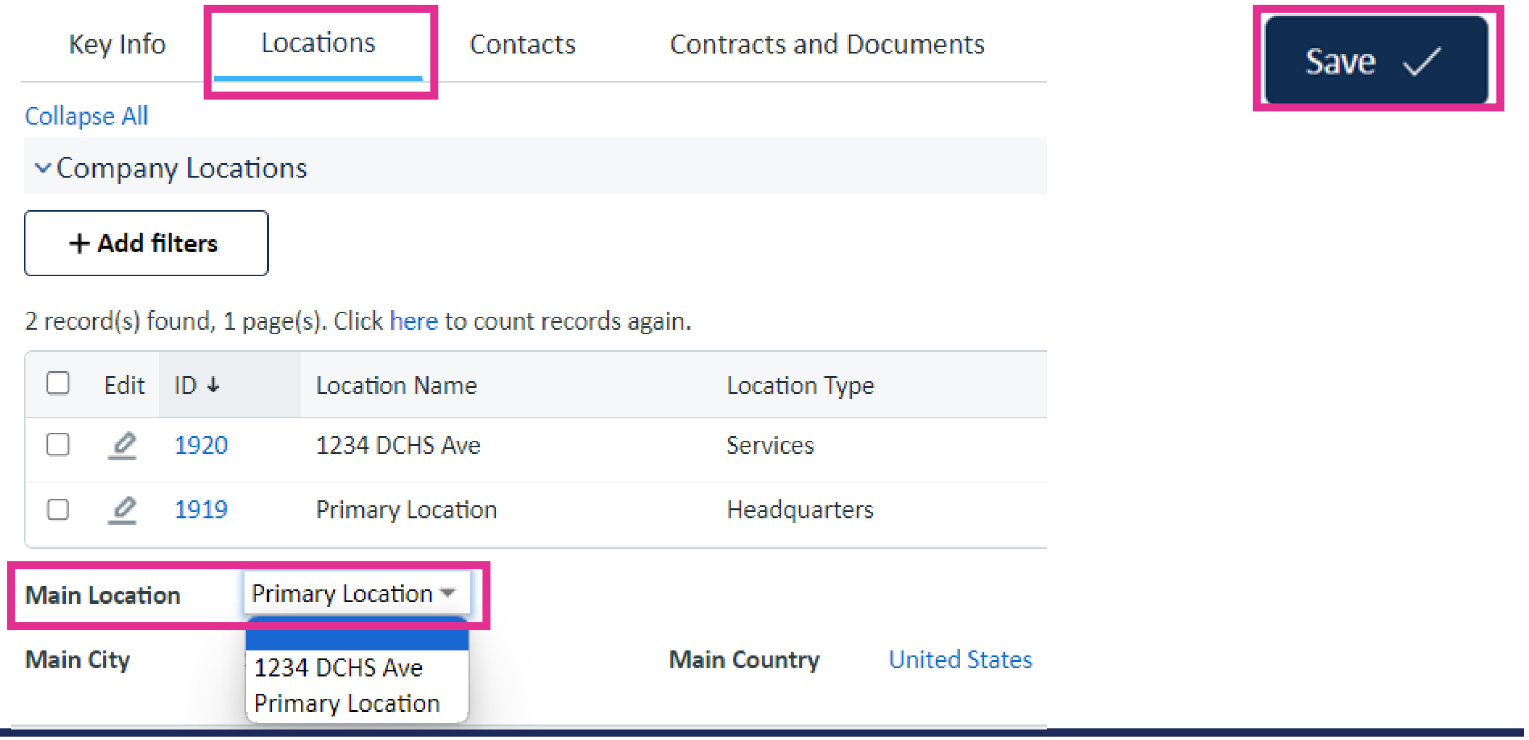
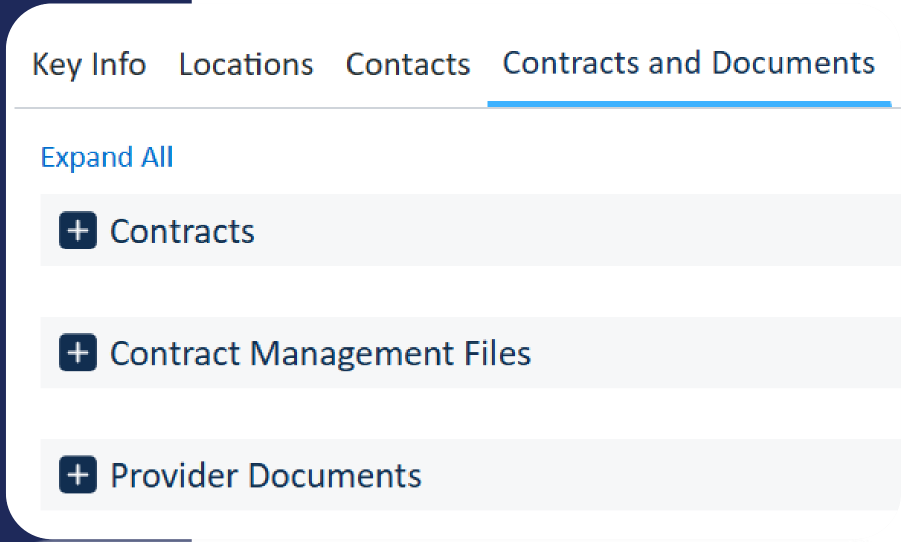
Indicate which location is your organization's 'Main Location'

- This is usually the organization's headquarters



Uploading Contract Related Documents

My Account Tile



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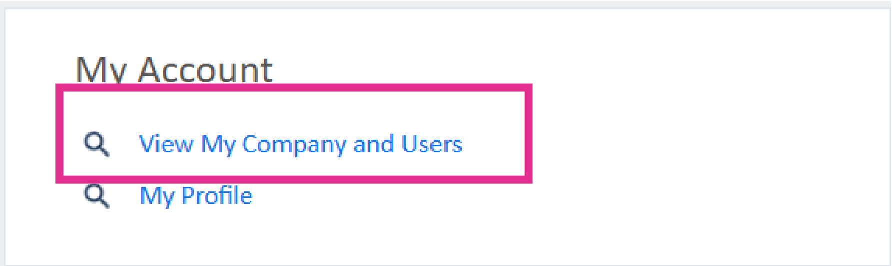
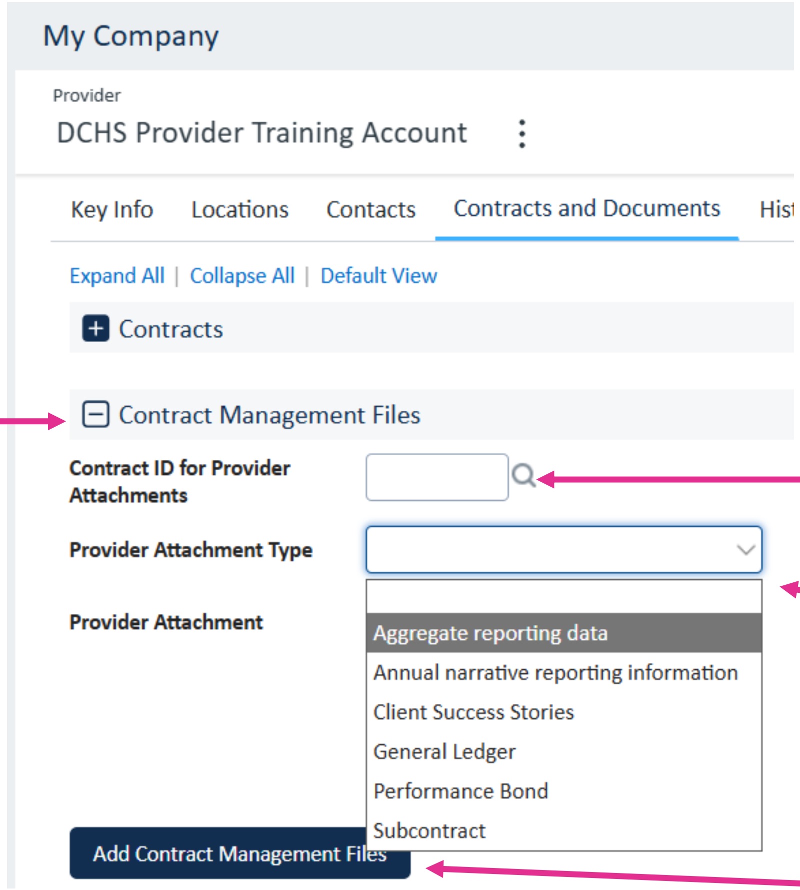
Documents such as subcontracts, aggregate, and narrative reports, etc. can now be uploaded via Agiloft

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

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*

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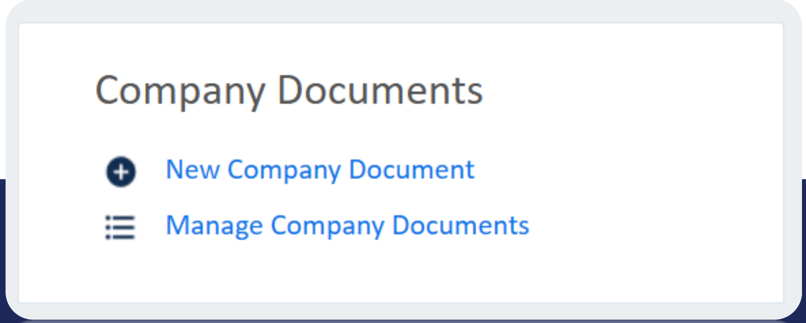
Uploading Company-Related Documents and Reports

Company Documents Tile



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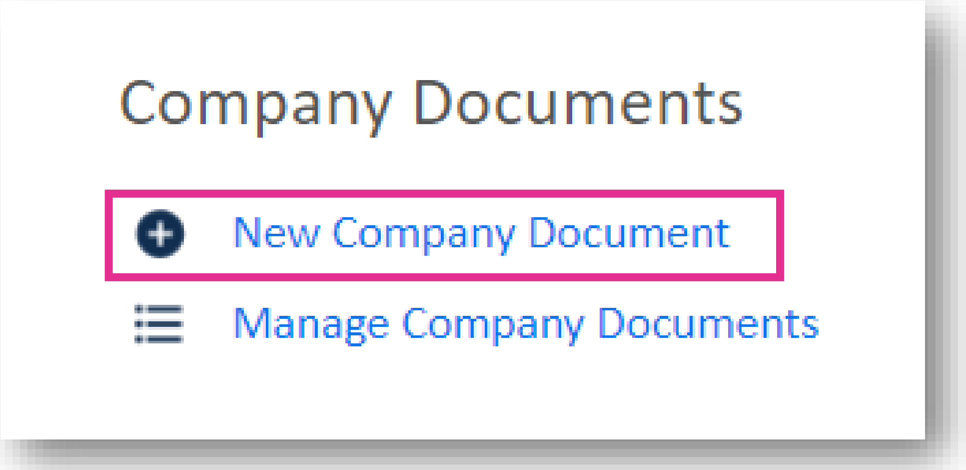
Documents such as W-9s, Certificates of Insurance, etc. can now be uploaded via Agiloft

- 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.*

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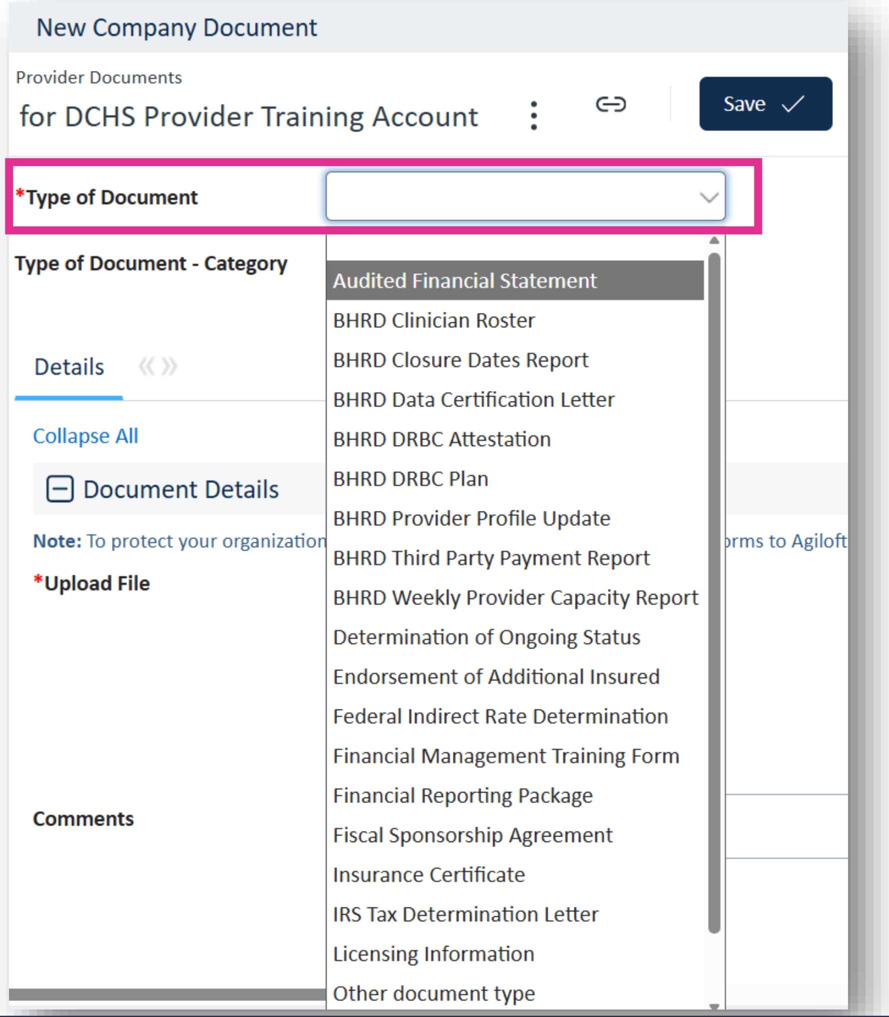
Choose the type of document being uploaded



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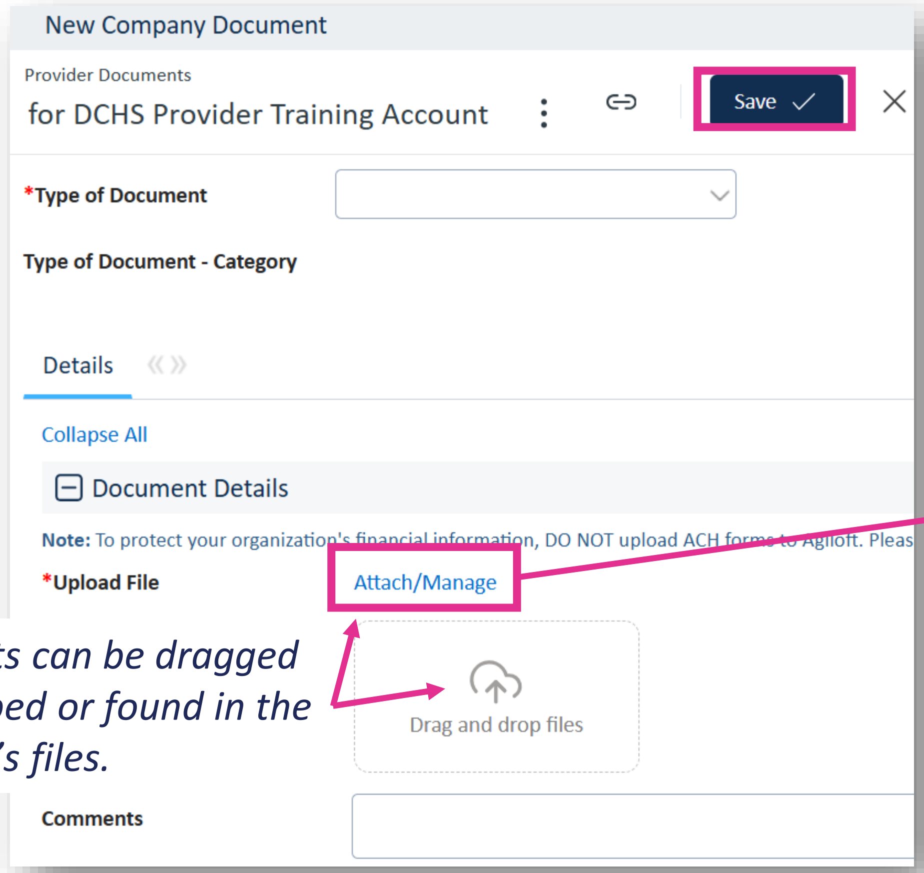
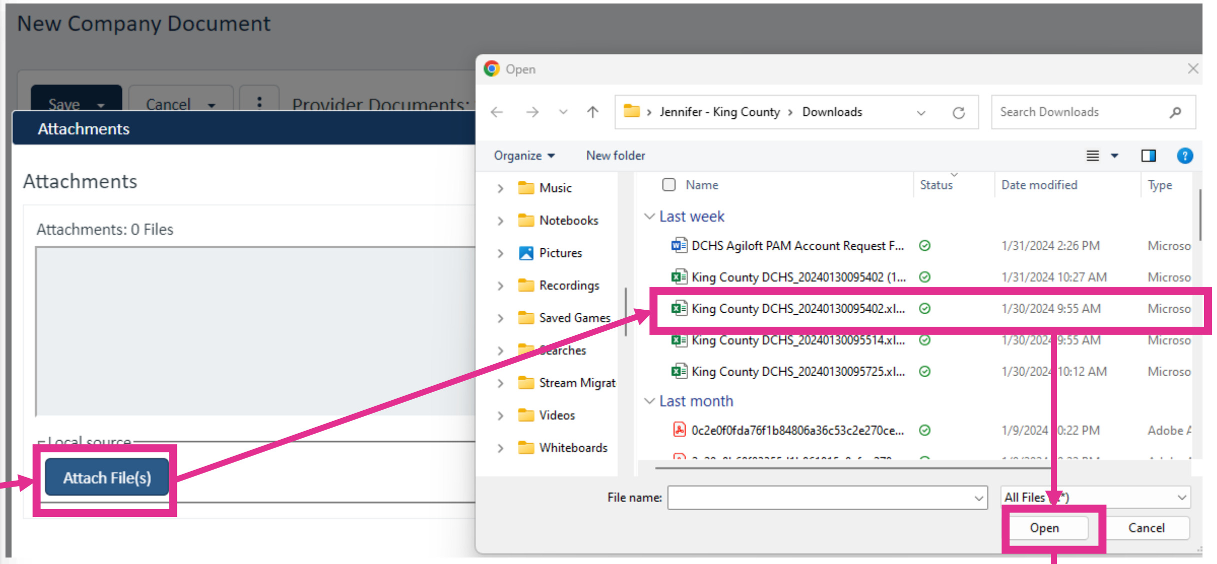
Find and attach the file—be thoughtful about the name



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



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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

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Chapter 1 Introduction

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

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Accessing Active Contracts

Contracts Tile

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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

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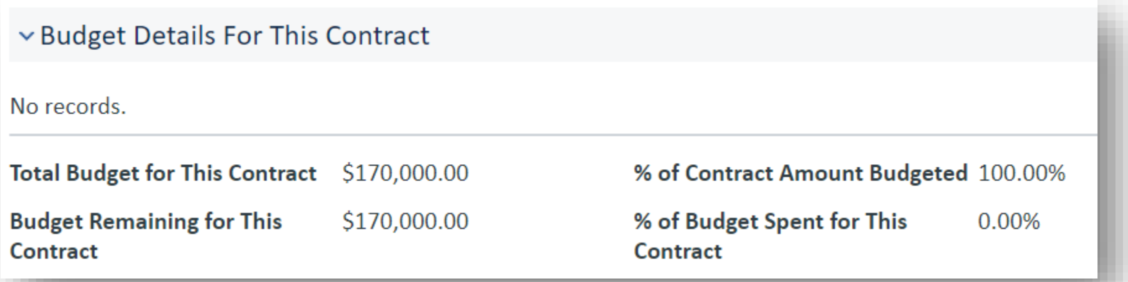
Contracts record parts, continued



- 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

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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

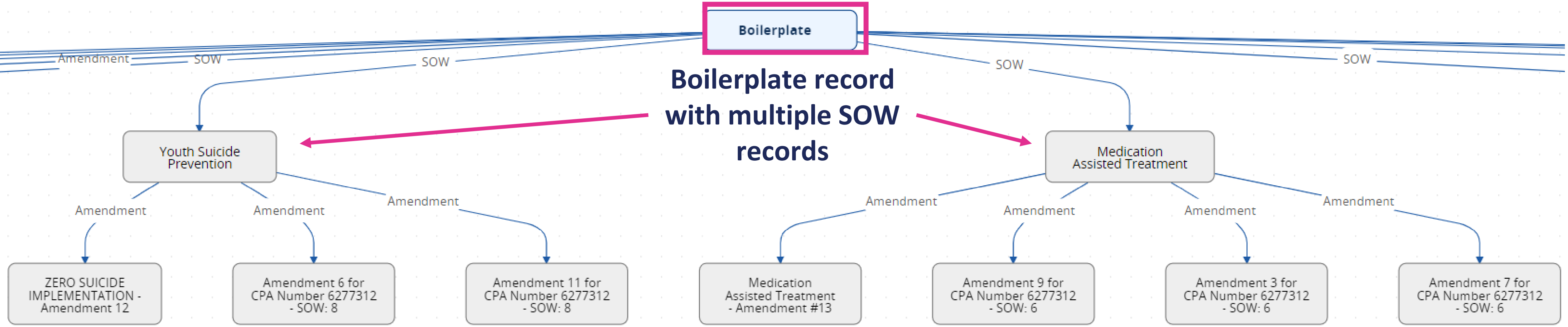
Final contract documents are sent for signature via DocuSign

Boilerplates and Statements of Work (SOW)

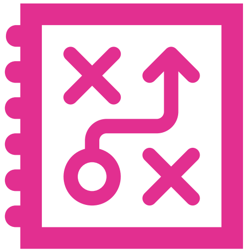
- For the past several years, DCHS has had a practice of attaching multiples Statements of Work (SOWs) (previously referred to as 'Exhibits') to a single Boilerplate
- To migrate these contracts and their data in this structure, each SOW/exhibit has its own contract record in Agiloft
  - Each SOW/exhibit 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

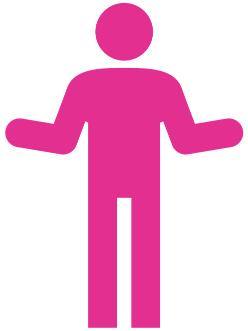
Example: Boilerplate with multiples SOWs

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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