



Texas Department of State Health Services

eGrants System

Contractor System Administrator (CSA) Manual

June 2015

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1. System Requirements

eGrants was designed so that the majority of computer users will be able to use the system with little or no changes to their computer environment. The three requirements that are mentioned below are common computer elements that should already be present on most machines.

1.a. Internet Connection

eGrants is a web site designed for and accessed via the Internet. The Internet is a general term that is also used to refer to the World Wide Web. If you are in an office environment, you may already have an Internet connection, but if you are unsure, please contact your organization's network administrator. The type of Internet connection your organization has will drive the speed of the system.

For those using a dial-up connection over a modem, it is highly recommended that you have a modem connection speed of at least 33.6 kbps (kilobits per second).

1.b. Web Browser

This system was designed to be compatible with web browsers including Internet Explorer (version 8 or above), Firefox (version 2 or above) and Safari (version 5).

Internet Explorer If you are using Internet Explorer, it is recommended that you add the eGrants homepage to your list of trusted sites. To do this, please complete the following steps:

1. Select "Tools"
2. Select "Internet Options"
3. Select the "Security" tab
4. Select "Trusted Sites"
5. Select the "Sites" button
6. In the "Add this Web site to the zone:" textbox type "eGrants.DSHS.texas.gov" and select the Add" button
7. Select the "OK" button, and then select the "OK" button again

1.c. Adobe Acrobat Reader

Adobe Acrobat Reader is used to view PDF (Portable Document Format) documents. eGrants will automatically generate Renewal Contract documents in PDF format. Using



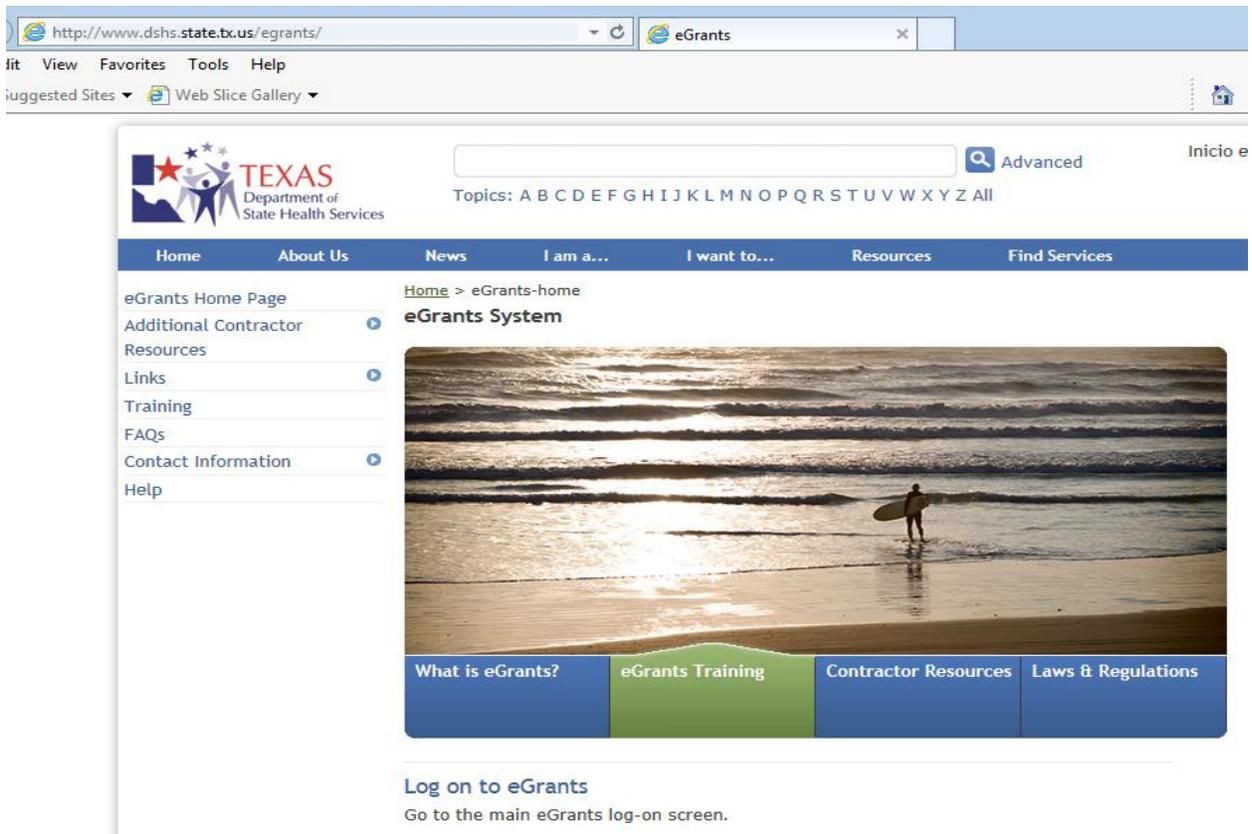
Adobe Acrobat Reader you may choose to view, print, or save these documents. If you do not have Adobe Acrobat Reader you can go to www.Adobe.com and download it for free.

2. eGrants Registration

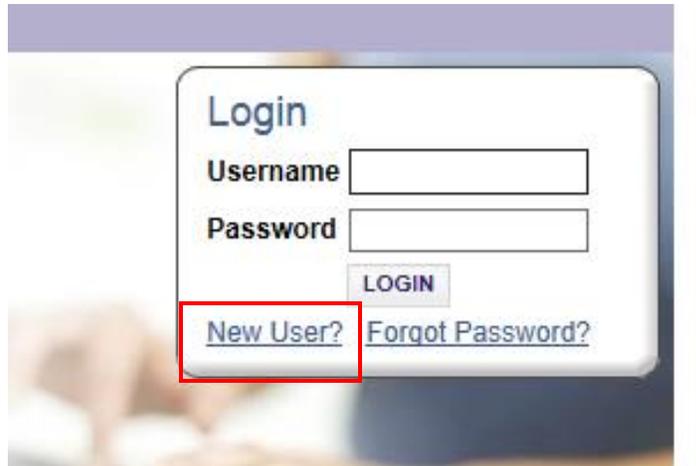
2.a. eGrants Registration at a Glance

Getting Started with eGrants

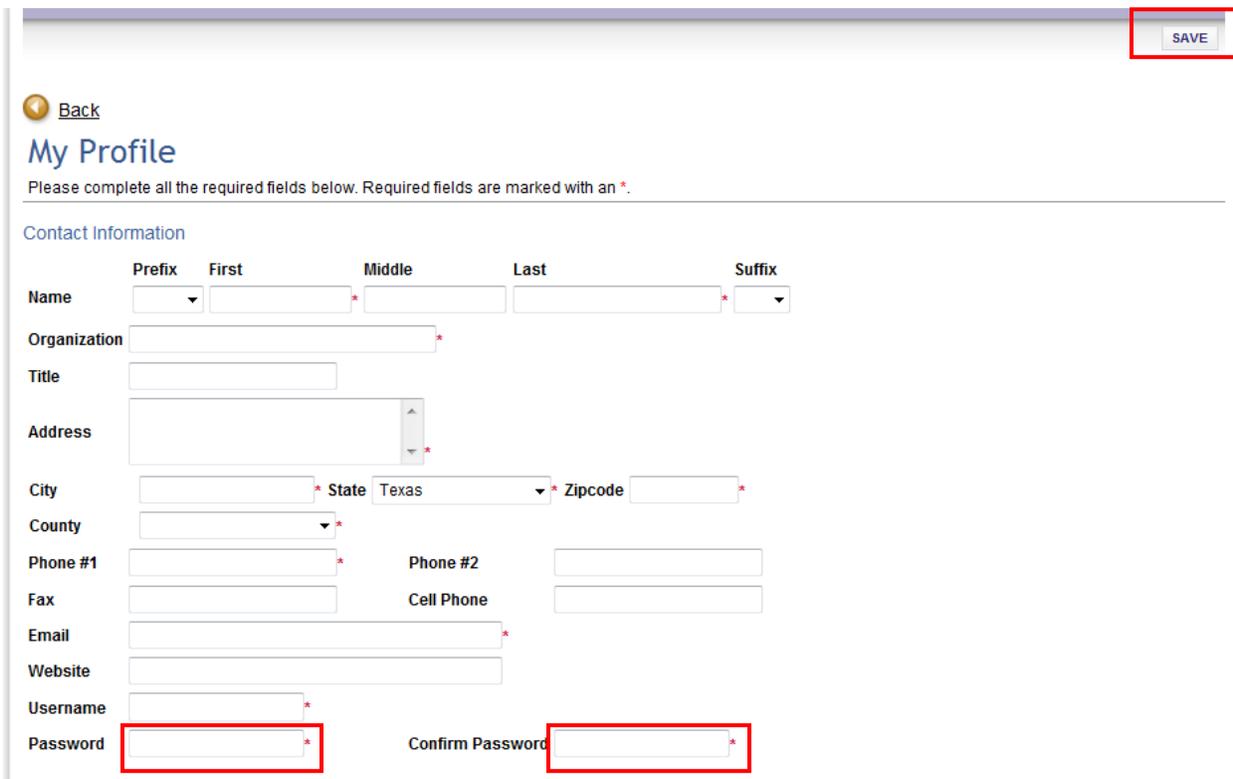
1. Identify the primary person who will be the Contractor System Administrator (CSA). The CSA is responsible for setting up your organizations information, adding users and assigning roles to users within the organization. The CSA should not be able to assign themselves other roles within the organization. If you are the CSA you should only be the CSA.
2. Once the CSA has been identified, they will perform the following:
 - a) Navigate to eGrants by going to <https://egrants.dshs.texas.gov> or <https://www.dshs.state.tx.us/egrants> and select on “Log on to eGrants”



b) Select on “New User?” on the eGrants Login page.



c) On the “My Profile” page enter the CSA’s information and setup a Username and temporary Password. Select “SAVE.”



The image shows the 'My Profile' page with the following elements: a 'Back' button, a 'SAVE' button in the top right corner, and a 'Contact Information' section. The 'Contact Information' section includes fields for Name (Prefix, First, Middle, Last, Suffix), Organization, Title, Address, City, State (Texas), Zipcode, County, Phone #1, Phone #2, Fax, Cell Phone, Email, Website, Username, Password, and Confirm Password. The 'Password' and 'Confirm Password' fields are highlighted with red boxes.

- d) The eGrants system administrator validates the Organization(s) information and assigns the CSA Role.
- e) Once the information has been validated, the CSA will receive an e-mail from the system indicating an account has been established. This process may take 1 to 2 business days.

The CSA will have to log into eGrants, set up a permanent password (eGrants will prompt for a change of password), add users to the organization, add the organization’s vendor ID’s and populate the “Organization Details” page.

To contact eGrants technical support:

- E-mail eGrants@dshs.state.tx.us
- Call toll free 1-855-312-8474 or local 512-776-7825

2.b. Registration

To access eGrants, enter <https://eGrants.dshs.texas.gov> into the address bar of your web browser and hit “Enter.”

System Login

Welcome to eGrants

Welcome to the Texas Department of State Health Services eGrants system. With eGrants you can electronically sign your contracts, manage contracts, reporting and requests for reimbursements. For questions regarding eGrants, email eGrants@dshs.state.tx.us

***Warning!**

This information system, data, hardware, and software are State of Texas property. The use of this system is restricted to authorized users only; unauthorized access is prohibited. Usage of and all activity on this system are subject to security monitoring and testing. Unauthorized access, use or misuse of this system is a violation of applicable DSHS policies and state and federal laws, and will be subject to criminal prosecution. Users of this system should have no expectation of privacy with respect to the use of this system, except as otherwise provided by applicable privacy laws.

Login

Username

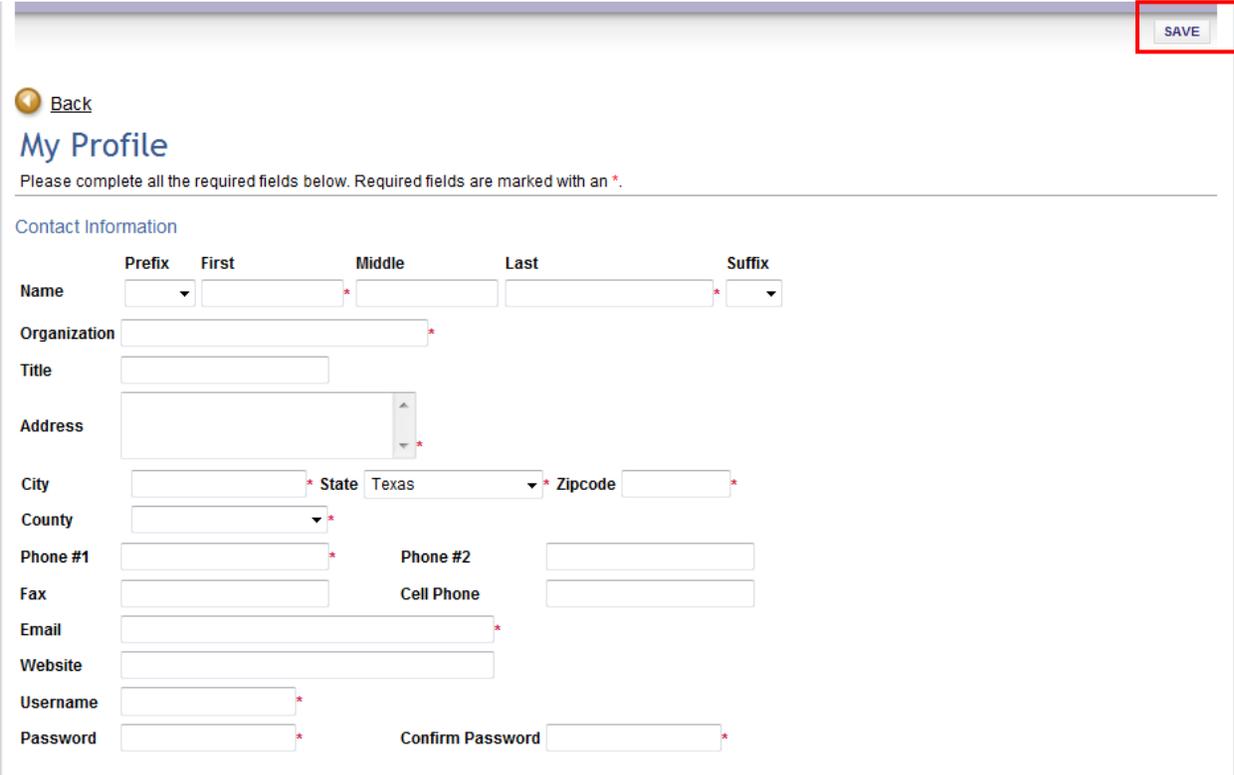
Password



2.b.1. Gaining access as a Contractor System Administrator

To create a New User account:

1. From the eGrants homepage select the “New User?” link located in the “Login” section.
2. The “My Profile” page appears.



SAVE

Back

My Profile

Please complete all the required fields below. Required fields are marked with an *.

Contact Information

	Prefix	First	Middle	Last	Suffix
Name	<input type="text"/>				
Organization	<input type="text"/>				
Title	<input type="text"/>				
Address	<input type="text"/>				
City	<input type="text"/>	State	Texas	Zipcode	<input type="text"/>
County	<input type="text"/>				
Phone #1	<input type="text"/>	Phone #2	<input type="text"/>		
Fax	<input type="text"/>	Cell Phone	<input type="text"/>		
Email	<input type="text"/>				
Website	<input type="text"/>				
Username	<input type="text"/>				
Password	<input type="text"/>	Confirm Password	<input type="text"/>		

3. Fill in all information as required. All items marked with an “*” in **RED** are required to create your account.
4. The “Username” field must consist of letters and/or numbers.
5. The “Password” field must contain a mix of upper and lower case alphabetic characters and at least two non-alpha characters. Passwords must have a length of at least 8 characters. **An example is Texas123.** Passwords expire every 60 days and cannot be reused within a 12 month period.
6. The fields “Password” and “Confirm Password” must be the same.
7. Select “SAVE.”

NOTE: When access to the system has been approved, the CSA will not have to request access again. There is no need to create a separate user account for each organization you manage within eGrants.

The user account will be approved by an eGrants System Administrator at DSHS before you can access the system. If you attempt to access eGrants prior to being approved the following message will be displayed:



When access has been granted by the system administrator at DSHS, the CSA will receive an email message confirming that your account has been established.

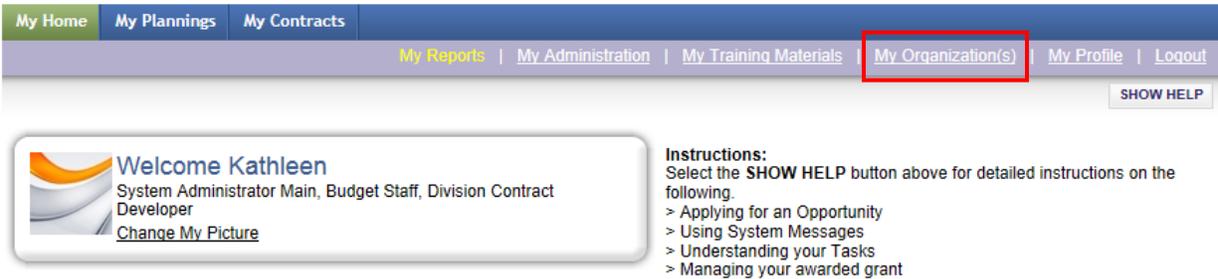
The CSA will be prompted to change their password the first time they log into eGrants.

2.c. Setup Organization Details

The first time a CSA logs into eGrants after being notified that their organization has been established they will go to “My Organization(s)” to update the “Organization Details” and “Organization Vendor IDs” pages. This information is required in order for DSHS to process a contract and get it to the organization for signature.

2.c.1. Setup Organization Details

1. Select “My Organization(s)”



The screenshot shows a user interface with a blue header bar containing navigation tabs: [My Home](#), [My Plannings](#), [My Contracts](#), [My Reports](#), [My Administration](#), [My Training Materials](#), [My Organization\(s\)](#) (highlighted with a red box), [My Profile](#), and [Logout](#). A [SHOW HELP](#) button is located in the top right corner. Below the header, a user profile box displays a welcome message for Kathleen, System Administrator Main, Budget Staff, Division Contract Developer, with a [Change My Picture](#) link. To the right, an **Instructions:** section lists tasks such as applying for opportunities, using system messages, understanding tasks, and managing awarded grants.

Hello Kathleen, please choose an option below.

View Available Opportunities

You have **12** My Opportunities available.
Select the **View Opportunities** button below to see what is available to your organization.

[VIEW OPPORTUNITIES](#)

My Inbox

You have **0** new messages.
Select the **Open My Inbox** button below to open your system message inbox.

[OPEN MY INBOX](#)

2. Select “Organization Details”

My Home | My Contracts

My Training Materials | My Organization(s) | My Profile | Logout

SAVE SHOW HELP

[Back](#)

Organization - New Health

Please complete all the required fields below. Required fields are marked with an *.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

Organization Information

Name	<input type="text" value="New Health"/>	*
Short Name	<input type="text" value="New Health"/>	
Address	<input type="text" value="1122 Main Street"/>	*
City	<input type="text" value="Austin"/>	*
State	<input type="text" value="Texas"/>	*
Zipcode	<input type="text" value="78756"/>	*
County	<input type="text" value="Travis County"/>	*
Phone	<input type="text" value="(512) 555-5555"/>	*
Fax	<input type="text"/>	
Website	<input type="text"/>	

3. Select “Organization Details”

My Home | My Plannings | My Contracts

[My Reports](#) | [My Administration](#) | [My Training Materials](#) | [My Organization\(s\)](#) | [My Profile](#) | [Logout](#)

[SHOW HELP](#)

[Back](#)

My Organization Information

Please complete all required forms below.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

Organization Details

Status	Page Name	Note	Created By	Last Modified By
	Payee Details			
	Organization Details			
	Organization Vendor IDs			

4. All fields with a red “*” are required. Upon completion of the data entry, select “SAVE”

My Home | My Proposals | My Procurements | My Renewals

My Reports | My Administration | My Training Materials | My Organization(s) | My Profile | Logout

SAVE CHECK GLOBAL ERRORS

[Back](#)

Document Information: [Payee-2012-TEX-00192](#)

[Details](#)

You are here: > [Organization Details Menu](#) > [Forms Menu](#)

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

ORGANIZATION DETAILS

Fiscal Year End Date: *

Accounting Basis: * Cash Accrual Modified Accrual

Entity Type: * Governmental For Profit Non-Profit

Entity Attributes: *

Select one or more that best describes your entity.

- | | |
|---|---|
| <input type="checkbox"/> Community-Based Organization | <input type="checkbox"/> Indian Tribe |
| <input type="checkbox"/> Faith Based (Nonprofit Org) | <input type="checkbox"/> Local Health Department |
| <input type="checkbox"/> Federally Qualified Health Centers | <input type="checkbox"/> Local Mental Health Authority |
| <input type="checkbox"/> Government Entity | <input type="checkbox"/> Minority Organization |
| <input type="checkbox"/> Hospital | <input type="checkbox"/> Private |
| <input type="checkbox"/> Hospital District | <input type="checkbox"/> State Institution of Higher Learning |
| <input type="checkbox"/> Independent School District | <input type="checkbox"/> Other |

Specify type:

- The system will refresh the page and update the “Navigation Links” section with a “Created by” indicator with a time and date stamp.

SAVE ADD NOTE CHECK GLOBAL ERRORS

ORGANIZATION DETAILS

Fiscal Year End Date: *

Accounting Basis: * Cash Accrual Modified Accrual

Entity Type: * Governmental For Profit Non-Profit

Entity Attributes: *
Select one or more that best describes your entity.

<input type="checkbox"/> Community-Based Organization	<input type="checkbox"/> Indian Tribe
<input type="checkbox"/> Faith Based (Nonprofit Org)	<input type="checkbox"/> Local Health Department
<input type="checkbox"/> Federally Qualified Health Centers	<input type="checkbox"/> Local Mental Health Authority
<input checked="" type="checkbox"/> Government Entity	<input type="checkbox"/> Minority Organization
<input type="checkbox"/> Hospital	<input type="checkbox"/> Private
<input type="checkbox"/> Hospital District	<input type="checkbox"/> State Institution of Higher Learning
<input type="checkbox"/> Independent School District	<input type="checkbox"/> Other

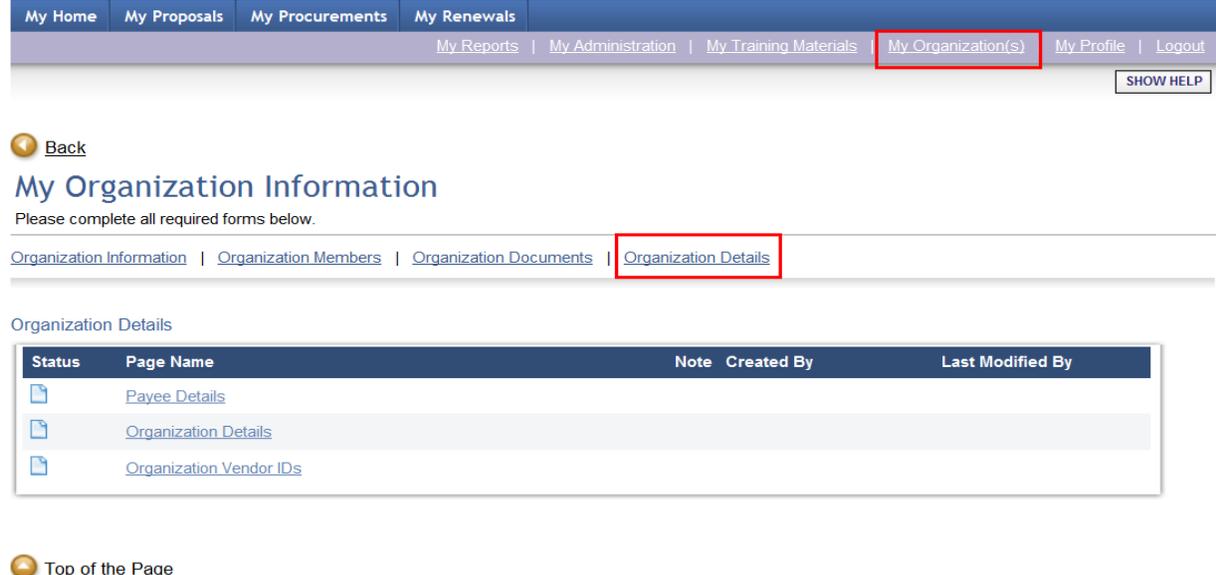
Specify type:

Navigation Links

Status	Page Name	Note	Created By	Last Modified By
	Payee Details			
	Organization Details		One, Employee 1/9/2014 1:33:06 PM	
	Organization Vendor IDs			

2.c.2. Setup Vendor IDs

1. Select “My Organization(s)”
2. Select “Organization Details”



My Home | My Proposals | My Procurements | My Renewals | My Reports | My Administration | My Training Materials | **My Organization(s)** | My Profile | Logout

[SHOW HELP](#)

[Back](#)

My Organization Information

Please complete all required forms below.

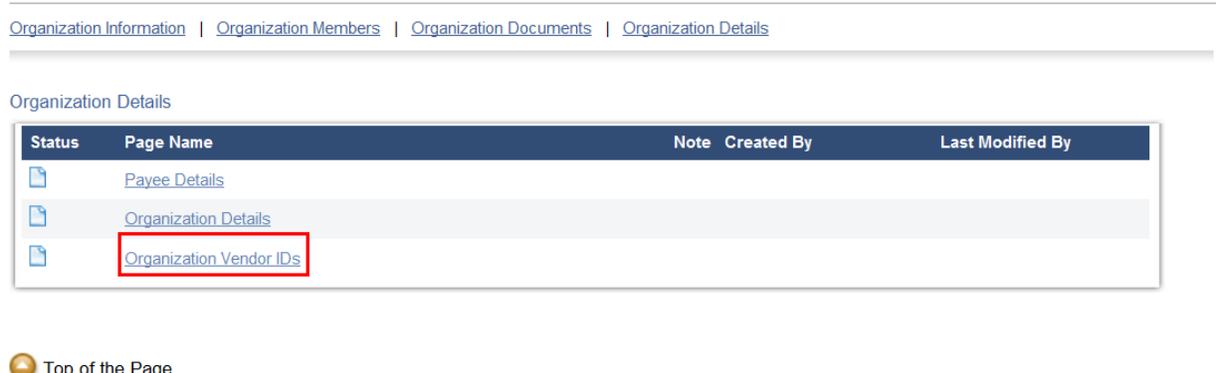
[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | **[Organization Details](#)**

Organization Details

Status	Page Name	Note	Created By	Last Modified By
	Payee Details			
	Organization Details			
	Organization Vendor IDs			

[Top of the Page](#)

3. Select “Organization Vendor IDs”



[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

Organization Details

Status	Page Name	Note	Created By	Last Modified By
	Payee Details			
	Organization Details			
	Organization Vendor IDs			

[Top of the Page](#)

4. Enter the Vendor ID information and select “SAVE”

[Back](#)

Document Information: [Payee-2012-CMPS Learning-00193](#)

[Details](#)

You are here: > [Organization Details Menu](#) > [Forms Menu](#)

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

ORGANIZATION VENDOR IDS

Organization Name: CMPS Learning

Vendor ID 1:

Vendor ID 2:

Navigation Links

Status	Page Name	Note	Created By	Last Modified By
	Payee Details			
	Organization Details		One, Employee 1/9/2014 1:33:06 PM	
	Organization Vendor IDs			

- eGrants will refresh the page with the saved data and update the “Created By” section under the “Navigation Links.”

[SAVE](#) [ADD NOTE](#) [CHECK GLOBAL ERRORS](#)

 **Page Information**
The information has been saved.

[Back](#)

Document Information: [Payee-2012-CMPS Learning-00193](#)

[Details](#)

You are here: > [Organization Details Menu](#) > [Forms Menu](#)

[Organization Information](#) |
 [Organization Members](#) |
 [Organization Documents](#) |
 [Organization Details](#)

ORGANIZATION VENDOR IDS

Organization Name: CMPS Learning

Vendor ID 1:

Vendor ID 2:

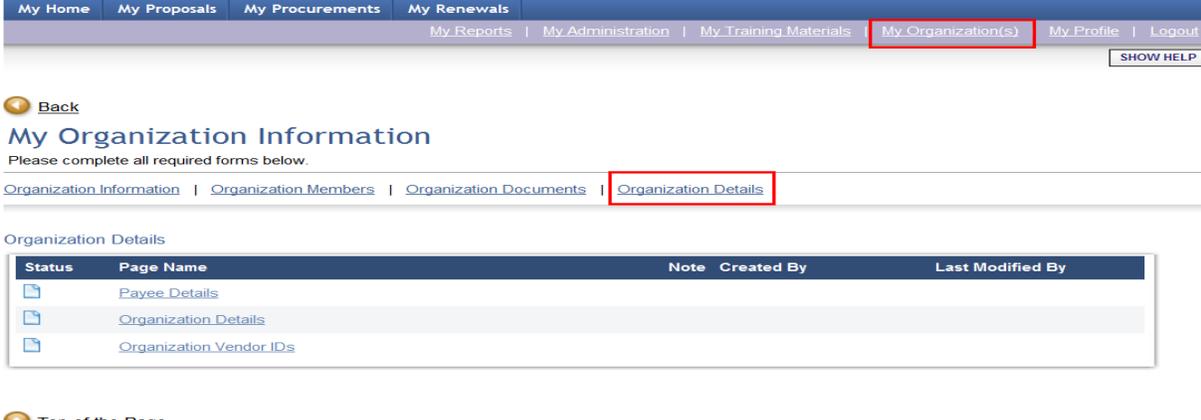
Navigation Links

Status	Page Name	Note	Created By	Last Modified By
	Payee Details			
	Organization Details		One, Employee 1/9/2014 1:33:06 PM	
	Organization Vendor IDs		One, Employee 1/9/2014 1:44:07 PM	

2.c.3. Validate Payee Details

The DSHS eGrants System Administrator will match your “Vendor IDs” to the “Payee Details” information. The “Payee Details” page will be completed at DSHS after all the information is verified. Once the information has been updated the CSA at the organization level will need to navigate to the “Payee Details” page to validate. If your “Payee Details” is not accurate you will need to contact the eGrants helpdesk.

1. Select “My Organization(s)”
2. Select “Organization Details”



The screenshot shows the user interface of the DSHS eGrants System Administrator. At the top, there is a navigation bar with tabs for 'My Home', 'My Proposals', 'My Procurements', 'My Renewals', 'My Reports', 'My Administration', 'My Training Materials', 'My Organization(s)', 'My Profile', and 'Logout'. The 'My Organization(s)' tab is highlighted with a red box. Below the navigation bar, there is a 'Back' button and the heading 'My Organization Information'. A sub-heading reads 'Please complete all required forms below.' Below this, there are four tabs: 'Organization Information', 'Organization Members', 'Organization Documents', and 'Organization Details'. The 'Organization Details' tab is highlighted with a red box. Underneath, the 'Organization Details' section contains a table with the following columns: 'Status', 'Page Name', 'Note', 'Created By', and 'Last Modified By'. The table lists three items: 'Payee Details', 'Organization Details', and 'Organization Vendor IDs'. At the bottom of the page, there is a 'Top of the Page' button.

3. Select on “Payee Details” to verify the information is correct.

[Details](#)

You are here: > [Organization Details Menu](#) > [Forms Menu](#)

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

PAYEE DETAILS 

State Vendor ID:

Mail Code:

Mail Code Status:

Payment Distribution:

PAYEE INFORMATION 

 Payee Name:

 Payee Short Name:

Federal Employer ID:

  DUNS Number:

 Address Description:

Address Line 1:

Address Line 2:

Address Line 3:

Address Line 4:

City:

County Code:

County:

State:

Zip Code: 

Phone Number:

Fax Number:

ENTITY INFORMATION

Entity Type:

Entity Sub-type:

If Entity Sub-Type 'Other', specify type:

DIRECT DEPOSIT INSTRUCTIONS

Direct deposit is a fast, easy and secure way to have checks or paychecks from the state of Texas posted directly to your bank account without the hassle of paper checks or waiting in line at the bank.

Visit the website link below to obtain a copy of the required form to setup direct deposit.
<http://www.window.state.tx.us/directdep/forms.html>

You may fax a copy of the completed form to:
 Texas Department of State Health Services
 Accounts Payable/Direct Deposit Program
 512-776-7442

2.d. Granting access to other users

To add a member to an organization, the CSA will perform the following:

1. Select “My Organization(s)”
2. Select “Organization Members”
3. Select “Add Members” and a person search field appears

 [Back](#)

Organization - CMPS Learning

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) |
 [Organization Members](#) |
 [Organization Documents](#) |
 [Organization Details](#)

Organization Members

Administrators with the authority to add members to your organization can follow these steps:
 To add a member to your organization, select the **Add Members** link below.
 If a member has already added his/her information in the system, you can search for the member.
 If you need to add a member's information into the system, select **New Member**.
 For more detailed instructions, select the **Show Help** button above.

[Current Members](#) |
 [Add Members](#)

<input type="checkbox"/>	Person	Role(s)	Active Dates	Organization Roles
<input checked="" type="checkbox"/>	One, Employee	Contractor System Administrator	01/09/2014 - open ended	View/Edit
<input checked="" type="checkbox"/>	Three - LN, Employee - FN	Contractor Responder	01/09/2014 - open ended	View/Edit
<input checked="" type="checkbox"/>	Two, Employee	Contractor Responder, Contractor Signatory	01/09/2014 - open ended	View/Edit

4. Type the first or last name of the person to add and select “SEARCH.” The results appear at the bottom of the page.

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Organization - CMPS Learning

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) |
 [Organization Members](#) |
 [Organization Documents](#) |
 [Organization Details](#)

Organization Members

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 If a member has already added his/her information in the system, you can search for the member.
 If you need to add a member's information into the system, select **New Member**.
 For more detailed instructions, select the **Show Help** button above.

[Current Members](#) |
 [Add Members](#)

Person Search

<input type="checkbox"/>	Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input type="checkbox"/>	One Employee		1/9/2014			
	<ul style="list-style-type: none"> • CMPS Learning (Contractor System Administrator) 					

- If the system finds the person being added to your organization, select the box to the left of the person's name. Select the downward facing arrow for a drop down box of "Roles," to make a selection.



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Organization - CMPS Learning

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

Organization Members

Administrators with the authority to add members to your organization can follow these steps:
 To add a member to your organization, select the **Add Members** link below.
 If a member has already added his/her information in the system, you can search for the member.
 If you need to add a member's information into the system, select **New Member**.
 For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

Person Search

<input type="checkbox"/>	Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input type="checkbox"/>	One_Employee • CMPS Learning (Contractor System Administrator)		1/9/2014			
<input checked="" type="checkbox"/>	Three - LN_Employee - FN • CMPS Learning (Contractor Responder)	-- Select --	1/9/2014			
<input type="checkbox"/>	Two_Employee • CMPS Learning (Contractor Responder) • CMPS Learning (Contractor Signatory)	-- Select --	1/9/2014			

- Select "SAVE" at the top right hand corner of the page. Then select "Current Members" and the person added will be displayed with the rest of the organization's member names.

7. If the person's name does not appear in the search results, then select "NEW MEMBER."

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Organization - CMPS Learning

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

Organization Members

Administrators with the authority to add members to your organization can follow these steps:
To add a member to your organization, select the **Add Members** link below.
If a member has already added his/her information in the system, you can search for the member.
If you need to add a member's information into the system, select **New Member**.
For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

Person Search

- Enter all required information for the “NEW MEMBER” (denoted with a red “*”). The “Password” field must contain a mix of upper and lower case alphabetic characters and at least two non-alpha characters. Passwords must have a length of at least 8 characters i.e. Texas123. Passwords expire every 60 days and cannot be reused within a 12 month period.

SAVE & ADD TO ORGANIZATION
SHOW HELP

Organization - CMPS Learning

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) |
 [Organization Members](#) |
 [Organization Documents](#) |
 [Organization Details](#)

Add/Edit Members

Administrators with the authority to add members to your organization can follow these steps:
Please complete the information below. All required fields are marked with an *.

	Prefix	First	Middle	Last	Suffix
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	<input type="text"/>				
Email	<input type="text"/>				
Username	<input type="text"/>				
Password	<input type="text"/>		Confirm Password	<input type="text"/>	
Date Active	<input type="text" value="1/9/2014"/>		Date Inactive	<input type="text"/>	
Role	<input type="text"/>				

The fields below are populated with the Organization information by default. However, you may edit the information in any of the fields. This information may also be edited by the person you are creating the profile for from their My Profile page.

Address	<input type="text" value="123 ABC St"/>				
City	<input type="text" value="Austin"/>	State	<input type="text" value="Texas"/>	Zipcode	<input type="text" value="78751"/>
County	<input type="text" value="Tarrant County"/>				
Phone #1	<input type="text" value="(512) 555-1212"/>	Phone #2	<input type="text"/>		
Fax	<input type="text"/>	Cell Phone	<input type="text"/>		
Website	<input type="text"/>				

- Verify the Organization information at the bottom of the page and update if necessary.
- Select the “SAVE & ADD TO ORGANIZATION” in the top right hand corner of the page.

2.d.1. Setup Contract Signatory

For processing of the Renewal Contracts it is required that your organization establish users with the role of “Contractor Signatory.” Performing this action prior to receiving your contracts from DSHS will ensure that your organization’s “Contractor Signatory” will receive automated email notifications to eSign contracts.

2.e. Adding additional roles to an existing organization member

There are six security roles defined for eGrants users: Contractor Responder, Contractor Accountant, Contractor Program Coordinator, Contractor Signatory, Contractor System Administrator, and Contractor View Only. These roles have different security access to work on the Proposals/Renewals. Once the Contract System Administrator(s) are identified and their new user accounts created, the Contractor System Administrator(s) will add users and assign roles to access eGrants.

Each security role is summarized below.

- Contractor Responder
 - Initiate and respond to solicitations
 - Editing forms during negotiations
 - View Renewal Contracts
- Contractor Accountant (*future role to be utilized*)
 - Submit invoices
 - Submit financial reporting
- Contractor Program Coordinator (*future role to be utilized*)
 - Submit program reports
- Contractor Signatory
 - Sign contract / declarations
 - Sign amendments
- Contractor System Administrator
 - Create user accounts
 - Assign user roles
 - Modifies Accounts

- Inactivates Accounts
- Manages Organization Information
- Contractor View Only
 - View Only

The system security role dictates what information can be seen, i.e. “My Administration” and “My Reports.”



Following are instructions for adding additional roles to current members:

1. Select “Organization Members” from the “My Organization(s)” page.



2. Select the “View/Edit” link in the “Organization Roles” column for the member who requires an additional role.

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Organization - CMPS Learning

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) |
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 [Organization Details](#)

Organization Members

Administrators with the authority to add members to your organization can follow these steps:
 To add a member to your organization, select the **Add Members** link below.
 If a member has already added his/her information in the system, you can search for the member.
 If you need to add a member's information into the system, select **New Member**.
 For more detailed instructions, select the **Show Help** button above.

[Current Members](#) |
 [Add Members](#)

<input type="checkbox"/> Person	Role(s)	Active Dates	Organization Roles
<input checked="" type="checkbox"/> One, Employee	Contractor System Administrator	01/09/2014 - open ended	View/Edit
<input checked="" type="checkbox"/> Three - LN, Employee - FN	Contractor Responder	01/09/2014 - open ended	View/Edit
<input checked="" type="checkbox"/> Two, Employee	Contractor Responder, Contractor Signatory	01/09/2014 - open ended	View/Edit

3. Select a role from the dropdown list and check the box for “Add As System Role.”
4. Confirm active date and select the “SAVE” button.

SAVE SHOW HELP

[Back](#)

Organization - CMPS Learning

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

Organization Members

To add a role for the member, select a role option in the blank row below. Then, select the Save button.
 To remove a role for the member, uncheck the box next to the role to remove. Then, select the Save button.
 For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

Name Employee One

Active Date

Inactive Date

System Roles Contractor Responder, Contractor System Administrator

<input type="checkbox"/> Organization Role	Add As System Role	Assigned By	Assigned Date	Modified By	Modified Date
<input checked="" type="checkbox"/> Contractor System Administrator	<input checked="" type="checkbox"/>	Uptmor, Kathleen	1/9/2014 1:22:25 PM		
<input checked="" type="checkbox"/> <input type="text"/>	<input type="checkbox"/>				

2.f. Deactivating a user in the Organization

CSA's can deactivate a member of an organization. A deactivated user cannot access, view, or edit eGrants information. To deactivate a user:

1. Select "Organization Members" from the "My Organization(s)" page.



My Home | My Proposals | My Procurements | My Renewals | My Training Materials | **My Organization(s)** | My Profile | Logout

SAVE SHOW HELP

[Back](#)

Organization - CMPS Learning

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

2. Select the "View/Edit" link in the "Organization Roles" column for the member of the organization who should be inactivated.



SAVE SHOW HELP

[Back](#)

Organization - CMPS Learning

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

Organization Members

Administrators with the authority to add members to your organization can follow these steps:
 To add a member to your organization, select the **Add Members** link below.
 If a member has already added his/her information in the system, you can search for the member.
 If you need to add a member's information into the system, select **New Member**.
 For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

Person	Role(s)	Active Dates	Organization Roles
<input checked="" type="checkbox"/> One, Employee	Contractor System Administrator	01/09/2014 - open ended	View/Edit
<input checked="" type="checkbox"/> Three - LN, Employee - FN	Contractor Responder	01/09/2014 - open ended	View/Edit
<input checked="" type="checkbox"/> Two, Employee	Contractor Responder, Contractor Signatory	01/09/2014 - open ended	View/Edit

- Using the drop-down calendar, set the “Inactive Date” field to the date on which the user will no longer have access.

[Back](#)

Organization - CMPS Learning

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) |
 [Organization Members](#) |
 [Organization Documents](#) |
 [Organization Details](#)

Organization Members

To add a role for the member, select a role option in the blank row below. Then, select the Save button.
 To remove a role for the member, uncheck the box next to the role to remove. Then, select the Save button.
 For more detailed instructions, select the **Show Help** button above.

[Current Members](#) |
 [Add Members](#)

Name Employee One
Active Date 1/9/2014
Inactive Date

System Roles System Administrator

January, 2014						
Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Today: January 9, 2014

Add As System Role	Assigned By	Assigned Date	Modified By	Modified Date
<input checked="" type="checkbox"/>	Uptmor, Kathleen	1/9/2014 1:22:25 PM		
<input type="checkbox"/>				

- Select “SAVE.”

3. Organization and User Maintenance

3.a. Updating “My Organization(s)”

When an organization’s contact information changes it is important that the Contract System Administrator update that information in the system by following these steps:

1. Select the “My Organization(s)” link on the menu bar.
2. Update the form accordingly and select the “SAVE” button.
3. Select the Organization Details link and update the Organization Vendor ID.
4. Select the Organization Details link and then Organization Details again and update the information and save.

5. Once you are notified that the “Payee Details” have been setup, do the following:

1. Verify by logging into eGrants
2. Select “My Organization(s)”
3. Select “Organization Details”
4. Select “Payee Details”

If the “Payee Details” are not correct contact the eGrants helpdesk.



TEXAS
Department of State Health Services

CMPS
Contract Management and Procurement System

My Home | My Proposals | My Procurements | My Renewals | My Training Materials | **My Organization(s)** | My Profile | Logout

SAVE SHOW HELP

[Back](#)

Organization - CMPS Learning

Please complete all the required fields below. Required fields are marked with an *.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | **[Organization Details](#)**

Organization Information

Name *

Short Name

Address *

City * State * Zipcode *

County *

Phone * Fax

Website

4. Renewal Contract Process

4.a. Add/Edit People to Renewal Contracts

The following table reflects which roles can add/edit people based on a particular role:

	Contractor Responder (CON_1)	Contractor Accountant	Contractor Program Coordinator	Contractor Signatory (CON_4)	Contractor System Administrator	Contractor View Only (CON_V)
Security Role that can Add/Edit people based on role:						
Contractor Responder (CON_1)	X	X	X	X		
Contractor Accountant (CON_2)		X				
Contractor Program Coordinator (CON_3)	X	X	X	X		
Contractor Signatory (CON_4)	X			X		
Contractor System Administrator (CON_5)	X	X	X	X	X	X
Contractor View Only (CON_V)						

There are times when resources change in an organization, i.e. if one needed to add a new person to a specific renewal.

The CSA has administrative rights to add or remove security roles on Renewal Contracts. This allows users with certain security roles to “view only” or “add/edit” the forms in the Renewal Contract.

New users to eGrants will not be automatically added to existing Renewal Contracts. However, any user may be manually added to the Renewal Contracts throughout the entire Renewal process by utilizing the functionality in the “Access Management Tools” Section.

The following will give specific instructions on how to perform this task:

1. Select on “My Renewals”



TEXAS
Department of State Health Services

CMPS
Contract Management and Procurement System

My Home | My Proposals | My Procurements | **My Renewals** | My Reports | My Administration | My Training Materials | My Organization(s) | My Profile | Logout

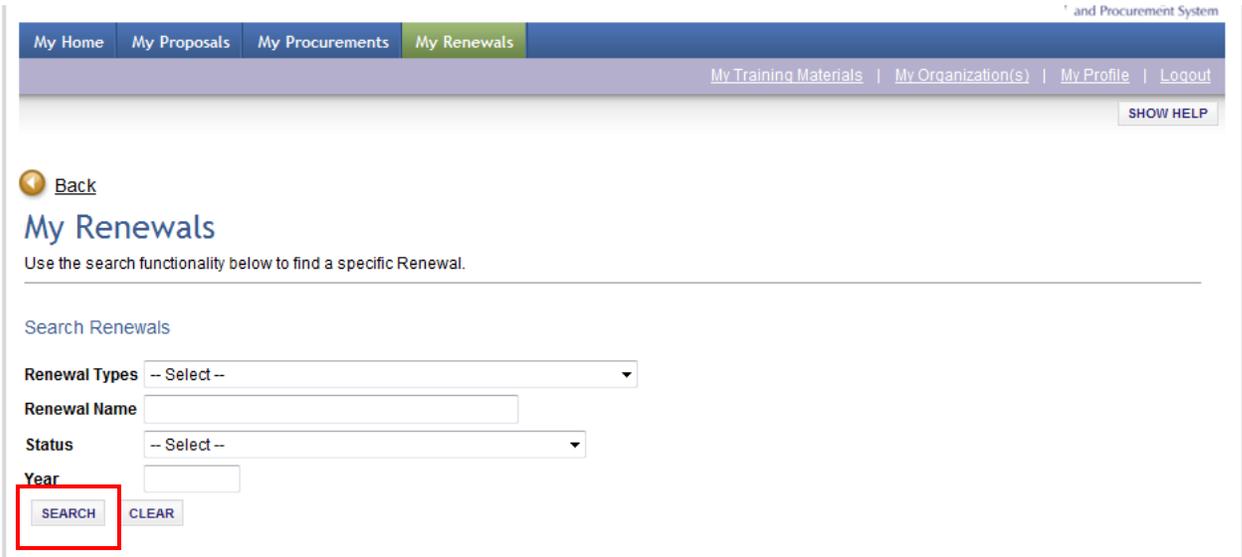
SHOW HELP

Welcome
System Administrator Main, Budget Staff, Division Contract Developer
[Change My Picture](#)

Instructions:
Select the **SHOW HELP** button above for detailed instructions on the following.
> Applying for an Opportunity
> Using System Messages
> Understanding your Tasks
> Managing your awarded grant

Hello , please choose an option below.

2. The “My Renewals” page will display so you can now search for the renewal.



and Procurement System

My Home | My Proposals | My Procurements | **My Renewals** | My Training Materials | My Organization(s) | My Profile | Logout

SHOW HELP

Back

My Renewals

Use the search functionality below to find a specific Renewal.

Search Renewals

Renewal Types -- Select --

Renewal Name

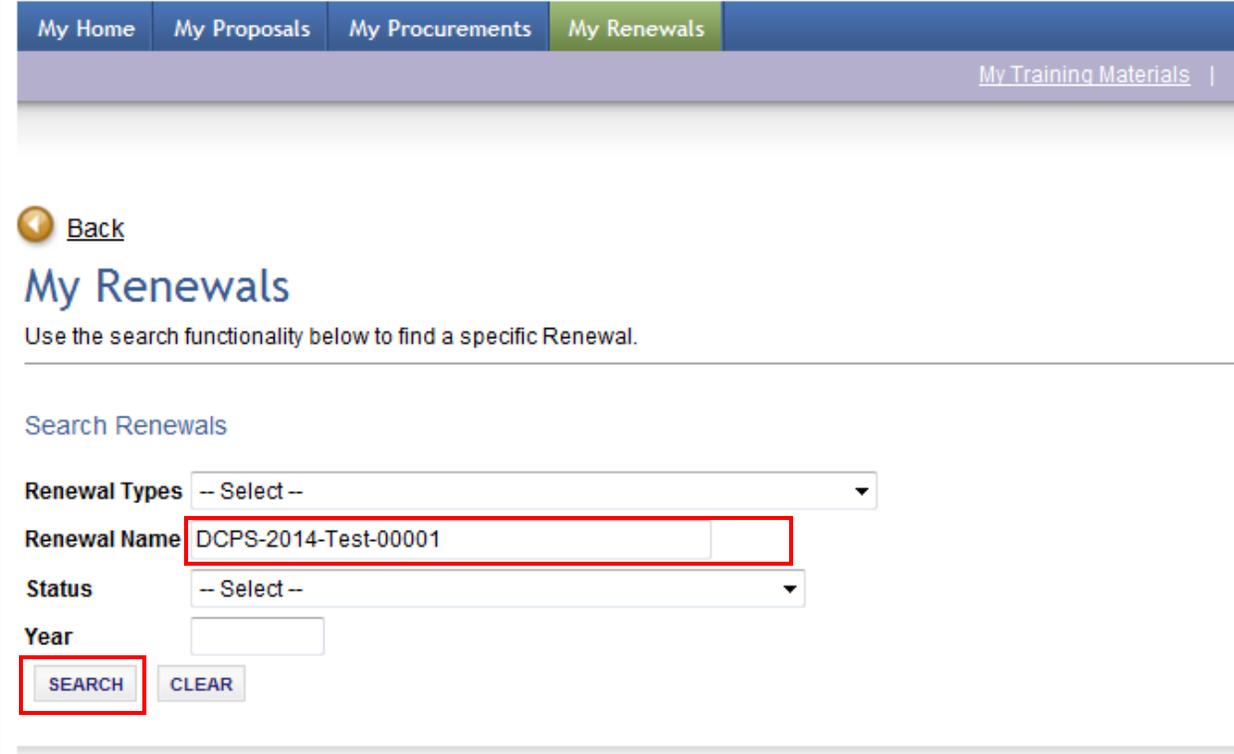
Status -- Select --

Year

SEARCH CLEAR

NOTE: You can search at this point by selecting “SEARCH” and this will pull all the Organization’s documents.

3. Enter in the Renewal Name a/k/a Document Name and select “SEARCH”



NOTE: This method searching will only pull the contract associated with the Renewal not all contracts the Organization may have.

4. The “SEARCH” results will be viewable at the bottom of the page.

My Home
My Proposals
My Procurements
My Renewals
My Training Materials | My Organization(s) | My Profile | Log

SHOW HI

[Back](#)

My Renewals

Use the search functionality below to find a specific Renewal.

Search Renewals

Renewal Types -- Select --

Renewal Name

Status -- Select --

Year

SEARCH
CLEAR

Export Results to Screen Sort by: -- Select -- GO

Number of Results **1**

Document Type	Organization	Name	Current Status	Year
Renewal	Incorporated	DCPS-2014- 00001		2014

1

5. Select the document name.

My Home | My Proposals | My Procurements | **My Renewals** | My Training Materials | My Organization(s) | My Profile | Log Out

[SHOW HIDE](#)

[Back](#)

My Renewals

Use the search functionality below to find a specific Renewal.

Search Renewals

Renewal Types: -- Select --

Renewal Name:

Status: -- Select --

Year:

Export Results to: Screen | Sort by: -- Select -- |

Number of Results **1**

Document Type	Organization	Name	Current Status	Year
Renewal	Prosperity Incorporated	DCPS-2014- 00001	Contract Executed	2014

1

- The Renewal Menu will appear. Select the “View Management Tools” button and choose the “Add/Edit People” link.

Renewal Menu

Document Information: [DSHS-2014-f](#) [00005](#)
 Parent Information: [DSHS-2013-f](#) [00006](#)
[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Renewal	Department	County Health	Contractor Signatory	Renewal Contract Bundle Ready for Signature 09/01/2013 - 08/31/2014 08/15/2013 12:00PM CST

View, Edit and Complete Forms

Select the View Forms button below to view, edit, and complete forms.

[VIEW FORMS](#)

Change the Status

Select the View Status Options button below to perform actions such as submitting applications or request modifications.

[VIEW STATUS OPTIONS](#)

Access Management Tools

Select the View Management Tools button below to perform actions such as adding people to this document or viewing the document history.

[VIEW MANAGEMENT TOOLS](#)

Management Tools

[CREATE FULL PRINT VERSION](#)

Select the link above to create a printable version of the document.

[ADD/EDIT PEOPLE](#)

Select the link above to perform actions such as adding people, changing a security role, or altering people's active dates on this document.

[STATUS HISTORY](#)

Select the link above to view the status history of this document.

[CHECK FOR ERRORS](#)

Select the link above to check the entire document for errors.

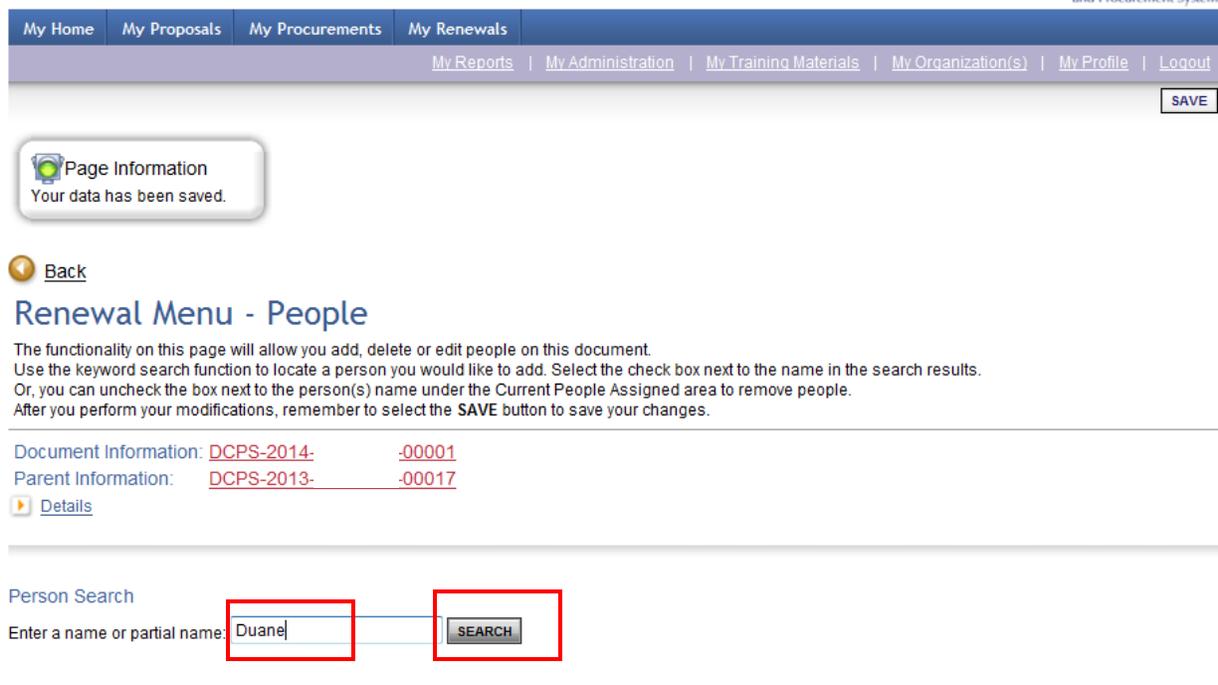
[PROCESS FLOW SNAPSHOT](#)

Select the link above to view the details of the current and next possible status for this document.

[VIEW MODIFICATION HISTORY](#)

Select the link above to view various modifications that people have made to specific pages in the document.

- Type in the name of the individual in the search criteria box and select the "SEARCH" button.



My Home | My Proposals | My Procurements | My Renewals

My Reports | My Administration | My Training Materials | My Organization(s) | My Profile | Logout

SAVE

Page Information
Your data has been saved.

Back

Renewal Menu - People

The functionality on this page will allow you add, delete or edit people on this document.
Use the keyword search function to locate a person you would like to add. Select the check box next to the name in the search results.
Or, you can uncheck the box next to the person(s) name under the Current People Assigned area to remove people.
After you perform your modifications, remember to select the **SAVE** button to save your changes.

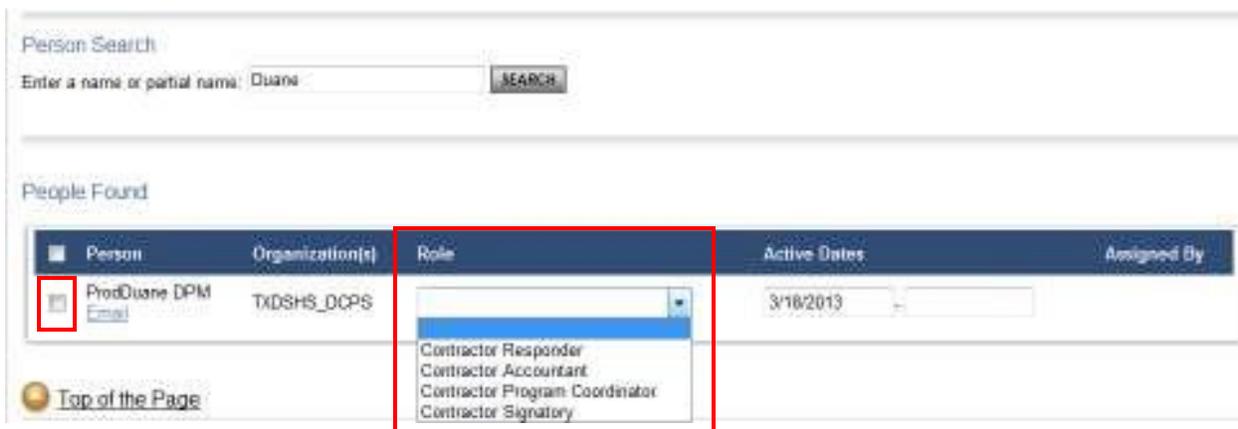
Document Information: DCPS-2014- -00001
Parent Information: DCPS-2013- -00017

Details

Person Search

Enter a name or partial name:

- From the search results, select the person by checking the box next to the name and assign him/her a security role.



Person Search

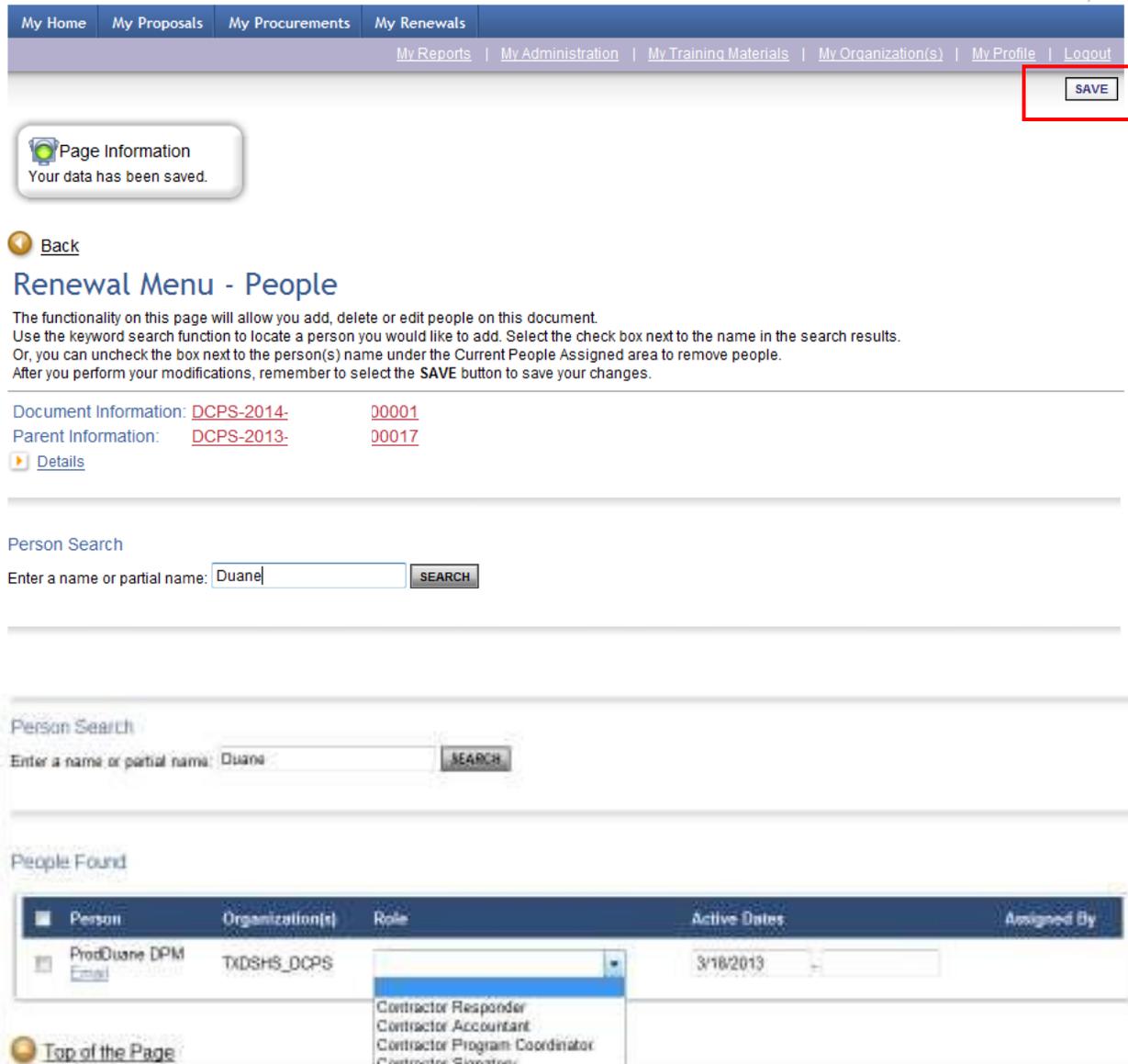
Enter a name or partial name:

People Found

Person	Organization(s)	Role	Active Dates	Assigned By
<input checked="" type="checkbox"/> ProdDuane DPM <small>Email</small>	TXDSHS_DCPS	<input type="text" value="Contractor Responder"/> <ul style="list-style-type: none"> Contractor Responder Contractor Accountant Contractor Program Coordinator Contractor Signatory 	3/18/2013	

Top of the Page

9. Select the “SAVE” button at the top right corner of the page to add the selected person to the Renewal contract.



My Home | My Proposals | My Procurements | My Renewals

My Reports | My Administration | My Training Materials | My Organization(s) | My Profile | Logout

SAVE

Page Information
Your data has been saved.

[Back](#)

Renewal Menu - People

The functionality on this page will allow you add, delete or edit people on this document.
Use the keyword search function to locate a person you would like to add. Select the check box next to the name in the search results.
Or, you can uncheck the box next to the person(s) name under the Current People Assigned area to remove people.
After you perform your modifications, remember to select the **SAVE** button to save your changes.

Document Information: [DCPS-2014-](#) [0001](#)
Parent Information: [DCPS-2013-](#) [0017](#)

[Details](#)

Person Search

Enter a name or partial name:

Person Search

Enter a name or partial name:

People Found

Person	Organization(s)	Role	Active Dates	Assigned By
<input type="checkbox"/> ProdDuane DPM	TXDSHS_DCPS	<input type="text" value="Contractor Responder"/>	3/18/2013	

[Top of the Page](#)

4.b. Remove People from Renewal Contracts

There are two ways to remove a user's access to a Renewal:

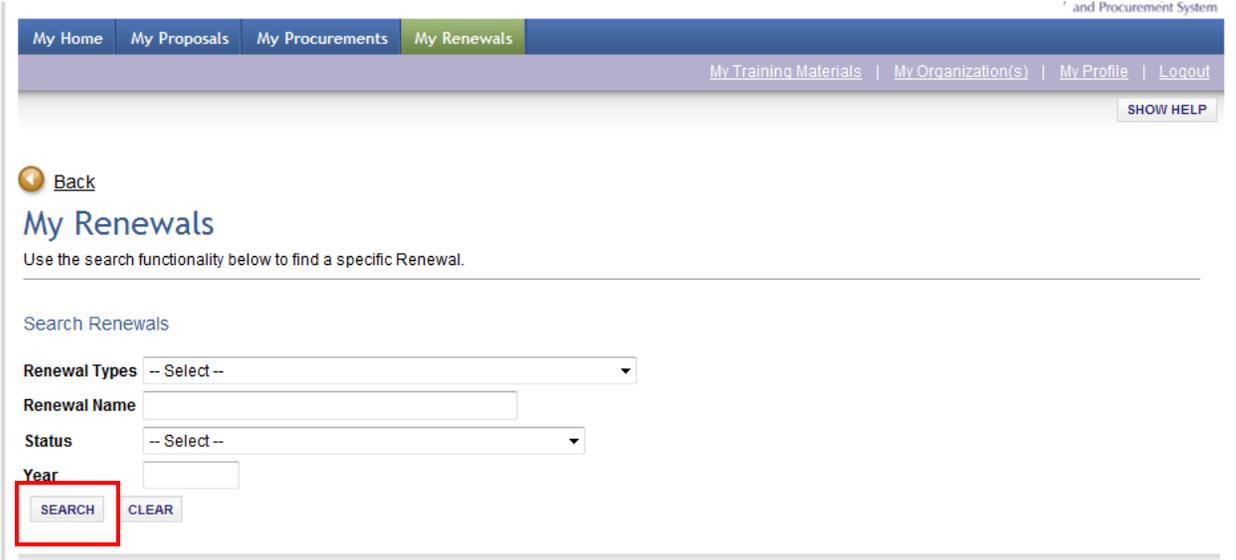
1. Specify the dates the user can access the document

- a) Select on "My Renewals"



The screenshot shows the user interface of the Texas Department of State Health Services CMPS. The navigation menu includes 'My Home', 'My Proposals', 'My Procurements', and 'My Renewals', with 'My Renewals' highlighted by a red box. Below the navigation bar, there is a user profile section for 'Wen' (System Administrator Main, Budget Staff, Division Contract Developer) and a 'SHOW HELP' button. Instructions for using the system are also visible.

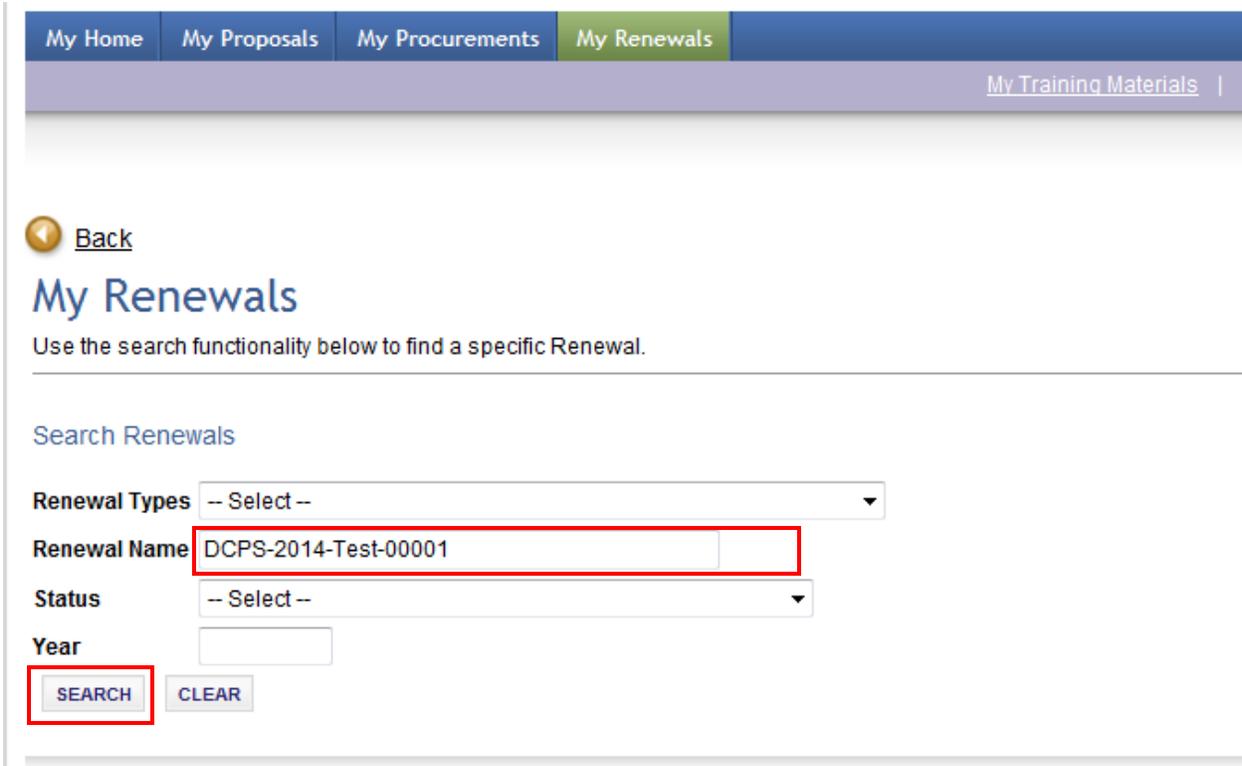
- b) The "My Renewals" page will display so you can now search for the renewal.



The screenshot shows the 'My Renewals' search page. The navigation bar is updated to show 'My Renewals' as the active page. The search section includes a 'Back' button, a 'Search Renewals' heading, and a search form with fields for 'Renewal Types', 'Renewal Name', 'Status', and 'Year'. The 'SEARCH' button is highlighted with a red box.

NOTE: You can search at this point by selecting "SEARCH" and this will pull all the Organization's documents.

c) Enter in the Renewal Name a/k/a Document Name and select “SEARCH”



The screenshot shows a web application interface for 'My Renewals'. At the top, there is a navigation bar with tabs for 'My Home', 'My Proposals', 'My Procurements', and 'My Renewals' (which is highlighted in green). To the right of the navigation bar is a link for 'My Training Materials'. Below the navigation bar, there is a 'Back' button with a left-pointing arrow. The main heading is 'My Renewals', followed by the instruction 'Use the search functionality below to find a specific Renewal.' Below this is a section titled 'Search Renewals' containing several search filters: 'Renewal Types' (a dropdown menu with '-- Select --'), 'Renewal Name' (a text input field containing 'DCPS-2014-Test-00001'), 'Status' (a dropdown menu with '-- Select --'), and 'Year' (a text input field). At the bottom of the search filters are two buttons: 'SEARCH' and 'CLEAR'. Red boxes are drawn around the 'Renewal Name' input field and the 'SEARCH' button.

NOTE: This method searching will only pull the contract associated with the Renewal not all contracts the Organization may have.

d) The “SEARCH” results will be viewable at the bottom of the page.

My Home
My Proposals
My Procurements
My Renewals
My Training Materials | My Organization(s) | My Profile | Log

SHOW HI

[Back](#)

My Renewals

Use the search functionality below to find a specific Renewal.

Search Renewals

Renewal Types -- Select --

Renewal Name

Status -- Select --

Year

SEARCH
CLEAR

Export Results to Screen Sort by: -- Select -- GO

Number of Results **1**

Document Type	Organization	Name	Current Status	Year
Renewal	Incorporated	DCPS-2014- 00001		2014

1

e) Select the document name.

My Home | My Proposals | My Procurements | **My Renewals** | My Training Materials | My Organization(s) | My Profile | Log Out

SHOW HIDE

[Back](#)

My Renewals

Use the search functionality below to find a specific Renewal.

Search Renewals

Renewal Types: -- Select --

Renewal Name:

Status: -- Select --

Year:

Export Results to: Screen | Sort by: -- Select -- |

Number of Results **1**

Document Type	Organization	Name	Current Status	Year
Renewal	Prosperity Incorporated	DCPS-2014- 00001	Contract Executed	2014

1

- f) The Renewal Menu will appear. Select the “View Management Tools” button and then choose the “Add/Edit People” link.

Renewal Menu

Document Information: [DSHS-2014-00005](#)
Parent Information: [DSHS-2013-00006](#)

 [Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Renewal	Department	County Health Contractor Signatory	Renewal Contract Bundle Ready for Signature	09/01/2013 - 08/31/2014 08/15/2013 12:00PM CST

View, Edit and Complete Forms

Select the [View Forms](#) button below to view, edit, and complete forms.

[VIEW FORMS](#)

Change the Status

Select the [View Status Options](#) button below to perform actions such as submitting applications or request modifications.

[VIEW STATUS OPTIONS](#)

Access Management Tools

Select the [View Management Tools](#) button below to perform actions such as adding people to this document or viewing the document history.

[VIEW MANAGEMENT TOOLS](#)

Management Tools

[CREATE FULL PRINT VERSION](#)

Select the link above to create a printable version of the document.

[ADD/EDIT PEOPLE](#)

Select the link above to perform actions such as adding people, changing a security role, or altering people's active dates on this document.

[STATUS HISTORY](#)

Select the link above to view the status history of this document.

[CHECK FOR ERRORS](#)

Select the link above to check the entire document for errors.

[PROCESS FLOW SNAPSHOT](#)

Select the link above to view the details of the current and next possible status for this document.

[VIEW MODIFICATION HISTORY](#)

Select the link above to view various modifications that people have made to specific pages in the document.

- g) The “Renewal Menu-People” page will be displayed. At the bottom of the page all organization members assigned to the contract will be listed. Select “View/Edit” under Document Roles for the specific person to be maintenance.

[SAVE](#)

[Back](#)

Renewal Menu - People

The functionality on this page will allow you add, delete or edit people on this document.
Use the keyword search function to locate a person you would like to add. Select the check box next to the name in the search results. Or, you can uncheck the box next to the person(s) name under the Current People Assigned area to remove people. After you perform your modifications, remember to select the **SAVE** button to save your changes.

Document Information: [DCPS-2014-I](#) [00001](#)
 Parent Information: [DCPS-2013-I](#) [00001](#)

[Details](#)

Person Search

Enter a name or partial name: [SEARCH](#)

Current People Assigned

Person	Organization(s)	Document Role(s)	Active Dates	Document Roles
<input checked="" type="checkbox"/> CMPS_test, TXDSHS	1-Texas Department of State Health Services	Contractor Responder, Contractor Signatory	07/24/2013 - open ended	View/Edit
<input checked="" type="checkbox"/> Davis-Contractor, Justin-Contractor	Abilene-Taylor County Public Health District, Angelina County & Cities Health District, BEXAR COUNTY HOSPITAL DISTRICT, Brazoria County Health Department, City of Amarillo Department of Public Health, City of Austin Health and Human Services, City of El Paso Department of Public Health, Dallas County Health and Human Services, Hays County, Houston Department of Health and Human Services, Plainview Foundation for Rural Health , Tarrant County	Contractor Signatory	10/29/2013 - open ended	View/Edit

- h) Enter the date the user will no long need access in the “inactive date” field using the drop down calendar. Select “SAVE” to complete the date entry or

SAVE

Back

Renewal Menu - People

The functionality on this page will allow you add, delete or edit people on this document.
Use the keyword search function to locate a person you would like to add. Select the check box next to the name in the search results.
Or, you can uncheck the box next to the person(s) name under the Current People Assigned area to remove people.
After you perform your modifications, remember to select the **SAVE** button to save your changes.

Document Information: [DCPS-2014-I](#) -00001
Parent Information: [DCPS-2013-I](#) -00001

Details

Person Search

Enter a name or partial name:

Current People Assigned

Name TXDSHS CMPS_test
Active Date 7/24/2013
Inactive Date

Role	Assigned By	Assigned Date	Modified By	Modified Date
<input checked="" type="checkbox"/> Contractor	Fox, Pamela-Contractor	7/24/2013 9:26:05 AM		
<input checked="" type="checkbox"/> Contractor	Fox, Pamela-Contractor	7/24/2013 9:26:05 AM		

October, 2013

Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

2. Disable the user

a) Select on “My Renewals”



My Home | My Proposals | My Procurements | **My Renewals** | My Reports | My Administration | My Training Materials | My Organization(s) | My Profile | Logout

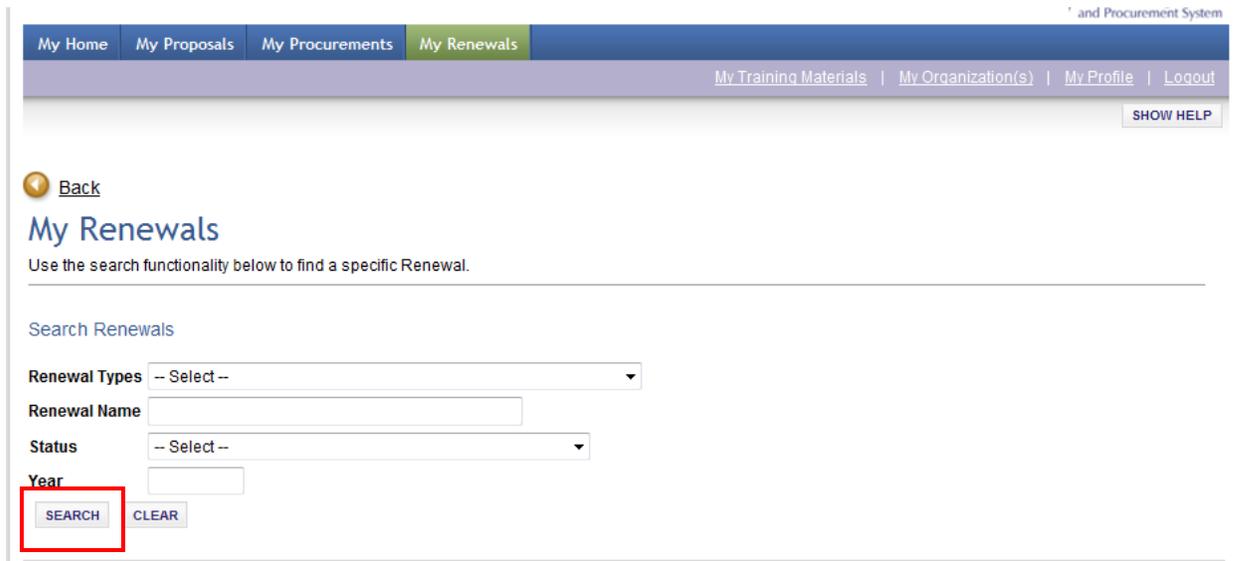
SHOW HELP

Welcome
System Administrator Main, Budget Staff, Division Contract Developer
[Change My Picture](#)

Instructions:
Select the SHOW HELP button above for detailed instructions on the following.
> Applying for an Opportunity
> Using System Messages
> Understanding your Tasks
> Managing your awarded grant

Hello , please choose an option below.

b) The “My Renewals” page will display so you can now search for the renewal.



My Home | My Proposals | My Procurements | **My Renewals** | My Training Materials | My Organization(s) | My Profile | Logout

SHOW HELP

Back

My Renewals

Use the search functionality below to find a specific Renewal.

Search Renewals

Renewal Types -- Select --

Renewal Name

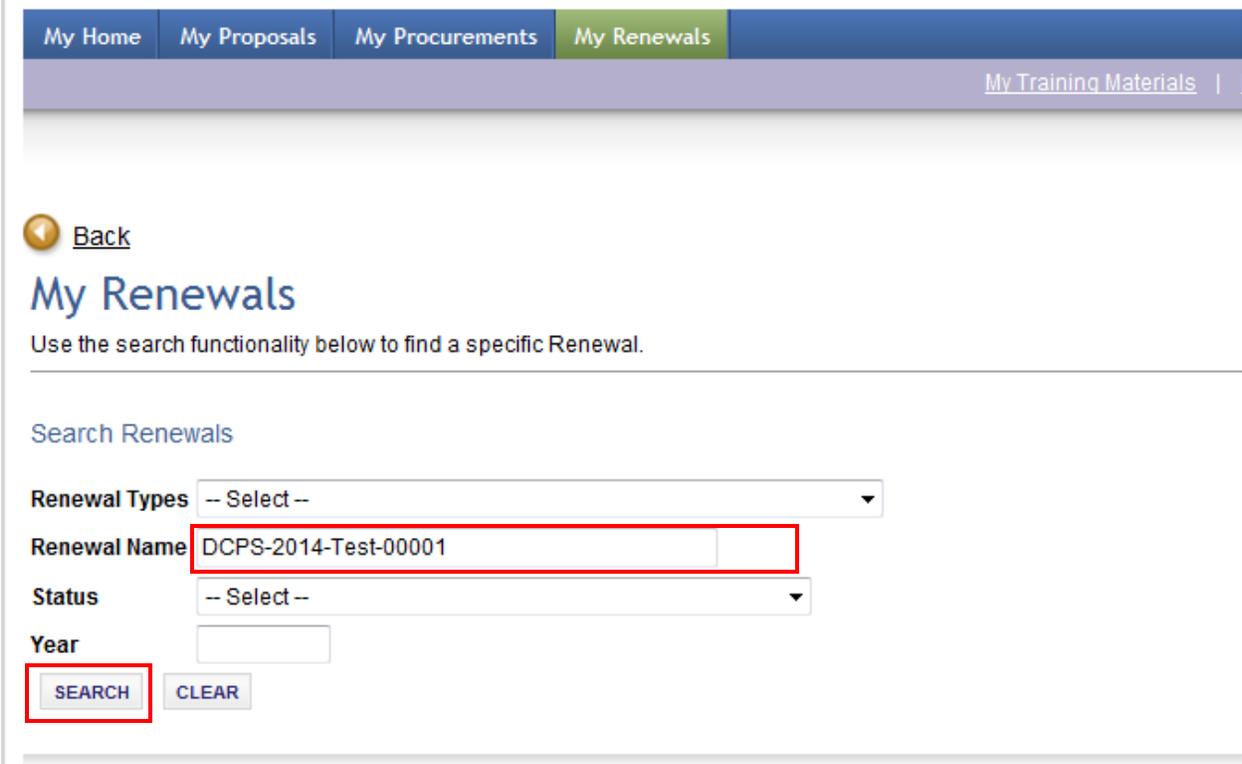
Status -- Select --

Year

SEARCH CLEAR

NOTE: You can search at this point by selecting “SEARCH” and this will pull all the Organization’s documents.

c) Enter in the Renewal Name a/k/a Document Name and select “SEARCH”



The screenshot shows a web application interface for 'My Renewals'. At the top, there is a navigation bar with tabs for 'My Home', 'My Proposals', 'My Procurements', and 'My Renewals' (which is highlighted). A link for 'My Training Materials' is visible on the right. Below the navigation bar, there is a 'Back' button with a left-pointing arrow. The main heading is 'My Renewals', followed by the instruction: 'Use the search functionality below to find a specific Renewal.' The search section is titled 'Search Renewals' and contains several input fields: 'Renewal Types' (a dropdown menu with '-- Select --'), 'Renewal Name' (a text input field containing 'DCPS-2014-Test-00001'), 'Status' (a dropdown menu with '-- Select --'), and 'Year' (a text input field). At the bottom of the search section, there are two buttons: 'SEARCH' and 'CLEAR'. Red boxes highlight the 'Renewal Name' field and the 'SEARCH' button.

NOTE: This method searching will only pull the contract associated with the Renewal not all contracts the Organization may have.

d) The “SEARCH” results will be viewable at the bottom of the page.

My Home
My Proposals
My Procurements
My Renewals
My Training Materials | My Organization(s) | My Profile | Log

SHOW HI

[Back](#)

My Renewals

Use the search functionality below to find a specific Renewal.

Search Renewals

Renewal Types -- Select --

Renewal Name

Status -- Select --

Year

SEARCH
CLEAR

Export Results to Screen
Sort by: -- Select --
GO

Number of Results 1

Document Type	Organization	Name	Current Status	Year
Renewal	Incorporated	DCPS-2014- 00001		2014

1

e) Select the document name.

My Home | My Proposals | My Procurements | **My Renewals** | My Training Materials | My Organization(s) | My Profile | Log Out

SHOW HIDE

[Back](#)

My Renewals

Use the search functionality below to find a specific Renewal.

Search Renewals

Renewal Types: -- Select --

Renewal Name:

Status: -- Select --

Year:

Export Results to: Screen | Sort by: -- Select -- |

Number of Results: 1

Document Type	Organization	Name	Current Status	Year
Renewal	Prosperity Incorporated	DCPS-2014- 00001	Contract Executed	2014

1

- f) The Renewal menu will appear. Select the “View Management Tools” button and then choose the “Add/Edit People” link.

Renewal Menu

Document Information: [DSHS-2014](#) :00005

Parent Information: [DSHS-2013](#) :00006

 [Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Renewal	Department	County Health Contractor Signatory	Renewal Contract Bundle Ready for Signature	09/01/2013 - 08/31/2014 08/15/2013 12:00PM CST

View, Edit and Complete Forms

Select the [View Forms](#) button below to view, edit, and complete forms.

[VIEW FORMS](#)

Change the Status

Select the [View Status Options](#) button below to perform actions such as submitting applications or request modifications.

[VIEW STATUS OPTIONS](#)

Access Management Tools

Select the [View Management Tools](#) button below to perform actions such as adding people to this document or viewing the document history.

[VIEW MANAGEMENT TOOLS](#)

Management Tools

[CREATE FULL PRINT VERSION](#)

Select the link above to create a printable version of the document.

[ADD/EDIT PEOPLE](#)

Select the link above to perform actions such as adding people, changing a security role, or altering people's active dates on this document.

[STATUS HISTORY](#)

Select the link above to view the status history of this document.

[CHECK FOR ERRORS](#)

Select the link above to check the entire document for errors.

[PROCESS FLOW SNAPSHOT](#)

Select the link above to view the details of the current and next possible status for this document.

[VIEW MODIFICATION HISTORY](#)

Select the link above to view various modifications that people have made to specific pages in the document.

- g) The “Renewal Menu-People” page will be displayed. At the bottom of the page all organization members assigned to the contract will be listed.

My Home
My Proposals
My Procurements
My Renewals

[My Reports](#) | [My Administration](#) | [My Training Materials](#) | [My Organization\(s\)](#) | [My Profile](#) | [Logout](#)

SAVE

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Renewal Menu - People

The functionality on this page will allow you add, delete or edit people on this document.
 Use the keyword search function to locate a person you would like to add. Select the check box next to the name in the search results.
 Or, you can uncheck the box next to the person(s) name under the Current People Assigned area to remove people.
 After you perform your modifications, remember to select the **SAVE** button to save your changes.

Document Information: [DCPS-2014-](#) [-00001](#)
 Parent Information: [DCPS-2013-](#) [-00001](#)

[Details](#)

Person Search

Enter a name or partial name: SEARCH

Current People Assigned

	Person	Organization(s)	Document Role(s)	Active Dates	Document Roles
<input checked="" type="checkbox"/>	CMPS_test, TXDSHS	1-Texas Department of State Health Services	Contractor Responder, Contractor Signatory	07/24/2013 - open ended	View/Edit

- h) Select on the box to the left of the person you are disabling (the check mark will disappear) and select on “SAVE” in the top right corner of the page.