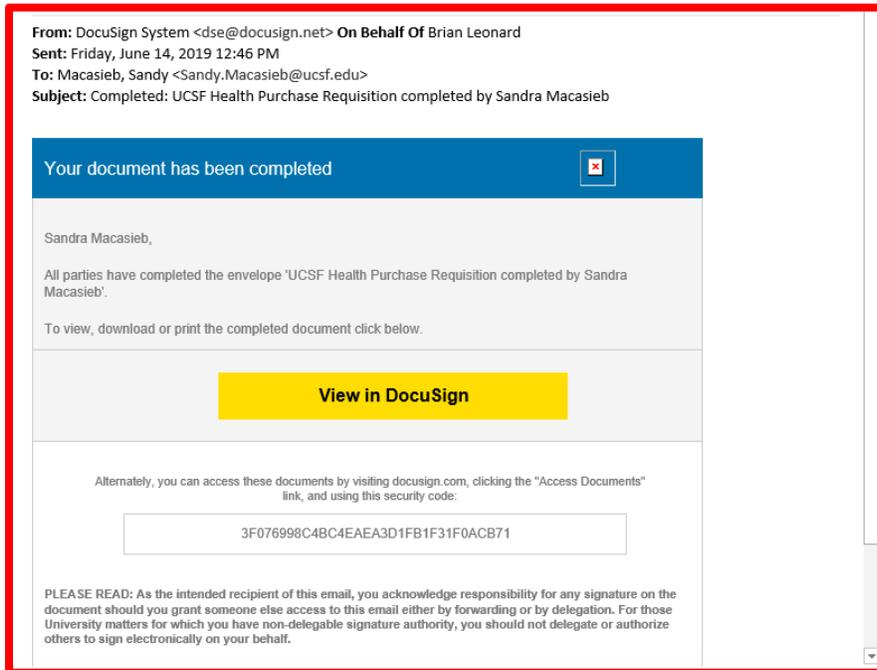


## FAQ re: TRANSITION REGARDING CONTRACTS MANAGEMENT FROM MEDTRACT TO SALESFORCE

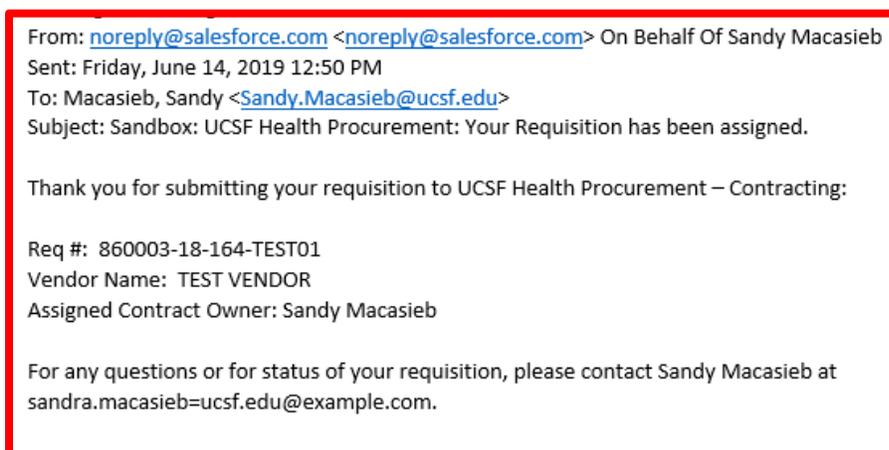
### What has changed in the DocuSign Routing process?

- There will be no change to the general requisitioning process as Requisitions (“Req”) will still be completed and filled out via DocuSign using the following link - <https://www.supplychain-ucsfhealth.org/electronic-req>
- Once the Req is received, reviewed and approved by Procurement Services, the Req will be closed out in DocuSign and the Requestor will receive an automated email from DocuSign similar to the following:



### How to find assigned Contract Owner?

- When assigned to a Contract Owner, an automated Salesforce notification will be sent to the Requestor similar to as follows:



- If there is no Salesforce notification of the Assigned Contract Owner within three (3) business days of the Req closing via the DocuSign, please contact Ada Liu at [ada.liu@ucsf.edu](mailto:ada.liu@ucsf.edu)

#### **How to find the current contract status?**

- Please contact the Assigned Contract Owner in the automated Salesforce notification
- If the contracting process has begun and the Assigned Contract Owner does not respond within a reasonable timeframe, please escalate to Procurement Manager, Brian Leonard, at [brian.leonard@ucsf.edu](mailto:brian.leonard@ucsf.edu)

#### **How to determine whether the Req has been completed?**

- Contract Owner will send fully executed contract and UCSF Purchase Order (“PO”) to Vendor and Dept Requestor, which will reflect the completion of the Req
- In the future, the Dept Requestor will receive an automated Salesforce notification that the Req has been completed

#### **How to find finalized Purchase Orders and contracts?**

- Contract Owner will send fully executed contract and UCSF Purchase Order upon completion (see above)
- Contract Owner will share link for fully executed agreements via Box<sup>1</sup>, which is a UCSF enterprise cloud-based file collaboration tool managed by UCSF IT and access will be through MyAccess

#### **How to locate historical and current contracts that were previously in Meditract?**

- Interim reporting will be made available for contracts by Dept/cost center
- For locating specific contract(s), please contact Procurement Services at the designated Contract Owner that is listed in the report or Brian Leonard at [brian.leonard@ucsf.edu](mailto:brian.leonard@ucsf.edu) to determine next steps, which may be dependent on volume of contract(s)

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<sup>1</sup> <https://it.ucsf.edu/services/ucsf-box>