

CONNECTIONS Tip Sheet

Creating Contract Headers

Introduction

In order to pay for needed services to children and families, local districts often contract with agencies. In addition, a district may contract with another district's foster home to provide foster care services. In order for the overnight batch update process to recognize the existence of the contract between a district and an agency (or between the district and another district's foster home), and subsequently update BICS and CCRS with this information, a Contract Header must first be recorded in CONNECTIONS.

This page of the *Contract Headers* tip sheet provides instructions for recording a contract between a district and an agency. Page 2 of this tip sheet provides instructions for recording a contract between a district and another district's foster home.

In order to record a Contract Header in CONNECTIONS, you must be assigned the MAINT CONTRACTS Business Function.

Creating a Contract Header in CONNECTIONS for an Agency

- 1 On the CONNECTIONS Toolbar, click on the **Options** menu and select the **Contract Management...** command.
The Contract Search window displays.
If this command is disabled (grayed out), you do not have the appropriate security to create a Contract Header.
- 2 In the **Resource ID** field, enter the Resource ID (RID) of the (parent or prime) *agency*, then click on the **Search...** button.
The Contract List displays with the results of the search.
This window should be blank, indicating that no previous Contract Headers exist for this resource (agency).
- 3 Click on the **New...** button.
The Contract Header window displays.
- 4 In the **Resource ID** field, enter the Resource ID for the agency to which you need to make payments.
- 5 Click on the **Validate** button.
*The **Resource Name** field, **Vendor ID** column and **Addr 1** column populate.*
- 6 Double-click the box to the left of the Vendor ID listed.
A check mark displays in the box and highlights the row.
- 7 Click on the **Staff...** button.
The Staff Search window displays.
- 8 Enter the first and last name of the staff person who will be responsible for ensuring that this resource receives

payment(s), then click on the **Search** button.
The Staff List displays.

- 9 Click on the appropriate person's name on the *Staff List*, then click on the **OK** button.
*The Contract Header window displays with the **Contract Manager** field populated with the name of the person you just selected.*



If the person responsible for ensuring that this resource receives payment(s) is not on the *Staff List*, return to **Step 8** and use your name instead.

- 10 Click on the drop-down arrow for the **Program Type** field and select the appropriate option from the resulting list.
- 11 Click on the drop-down arrow for the **Procure Type** field and select **Non-Comp Neg** from the resulting list, then click on the **Save** button.
The following message displays: "Once saved the Budget Limit cannot be changed. Continue?"
- 12 Click on the **Yes** button.
The Contract List displays.
- 13 Click on the **Refresh** button.
The new Contract Header you just created now displays on the Contract List.

Creating a Contract Header in CONNECTIONS for Another District's Foster Home

- 1 On the CONNECTIONS Toolbar, click on the **Options** menu and select the **Contract Management...** command.
The Contract Search window displays.
If this command is disabled (grayed out), you do not have the appropriate security to create a Contract Header.
- 2 In the **Resource ID** field, enter the Resource ID (RID) of the foster home, then click on the **Search...** button.
The Contract List displays with the results of the search. This window should be blank, indicating that no previous Contract Headers exist for this resource (foster home).
- 3 Click on the **New...** button.
The Contract Header window displays.
- 4 In the **Resource ID** field, enter the Resource ID for the foster home to which you need to make payments.
- 5 Click on the **Validate** button.
The Resource Name field, Vendor ID column and Addr 1 column populate.
- 6 Double-click the box to the left of the Vendor ID listed.
A check mark displays in the box and highlights the row.
- 7 Click on the **Staff...** button.
The Staff Search window displays.
- 8 Enter the first and last name of the staff person who will be responsible for ensuring that this foster home receives payment(s), then click on the **Search** button.
The Staff List displays.
- 9 Click on the appropriate person's name on the *Staff List*, then click on the **OK** button.
The Contract Header window displays with the Contract Manager field containing the name of the person you selected.



If the person responsible for ensuring that this resource receives payment(s) is not on the *Staff List* in **Step 9**, return to **Step 8** and use your name instead.



Use the Contract Header recording process when you need to move a vendor to BICS and you are *not* the Maintainer of the resource in CONNECTIONS. Once you establish the contract, contact the Maintainer, who needs to update the resource in CONNECTIONS.

The *contract* is made with the *agency*;
The *facility* needs to be maintained/updated.

- 10 Click on the drop-down arrow for the **Program Type** field and select the appropriate option from the resulting list.
- 11 Click on the drop-down arrow for the **Procure Type** field and select **Non-Comp Neg** from the resulting list.
- 12 Click on the **Save** button.
The following message displays:
"Once saved the Budget Limit cannot be changed. Continue?"
- 13 Click on the **Yes** button.
The Contract List displays.
- 14 Click on the **Refresh** button.
The new Contract Header you just created now displays on the Contract List.

If you need assistance performing any of the functions on this tip sheet, please talk to your supervisor.