1. **Access Total Contract Manager.**
   - Access the test site by visiting the link here: https://usertest.scquest.com/apps/Router/SAMLAuth/BaylorUniversity
   
Enter your Bear ID and Password to log in.

2. **Dashboard.** Access your Dashboard by clicking on the dropdown arrow beside your Username and selecting *Dashboards.*
3. **Facilitate a Contract.** As a Contract Facilitator, you will begin Internal Review Rounds and submit the contract for Approval once the Contract is finalized.

Click on the *Action Items* tab or the *Notifications* tab to view important tasks.

When a Contract Manager assigns you as a Contract Facilitator, you will see the bold **Contract Facilitation** notification, with the description “You have been assigned to facilitate Contract #__.”

Click on the Notification to go directly to the Contract.

4. **Contract Actions.** Once you are assigned as Contract Facilitator and are in the Contract Header, click on Contract Actions. If you do not have the Contract Checked Out to you (the lock symbol on the left side of the screen will show that the Contract is Checked Out to another user) then click *Override Check Out*, and then click Check Out so that you can begin an Internal Review Round. If you need to assign another Contract Facilitator, click on **Contract Actions** at the top right of the screen. Select the user to reassign the Contract Facilitator role if you are unable to perform the task.
5. **Begin an Internal Review Round.** Click on Review Rounds on the left tab of the screen to begin the review process.

Click *Start Drafting Next Round*, and then *Internal Review Round*.

### Review Rounds

This contract has 0 completed rounds of review.

**Next Round (Internal)**

- **Add Reviewer**
- **Delete Round**

Click **Add Reviewer**, type in the name of the reviewer, and click **Select**. Click **Save Changes** when you have finished adding reviewers.

Click **Begin Round**.
You will be asked to confirm the reviewers. Click Begin Internal Review.

To end the Review Round, click End Round Now. To skip a reviewer, click Skip Reviewer.

6. **ITS & Risk Elements.** You will need to check to ensure that the appropriate reviewers for ITS and Risk Elements reviewed the Contract Request, and add them to an Internal Review Round if requested. A list of the Risk Element Approvers is below.

If the Contract will be signed by Pattie Orr and was not created by Ralph Sherman, please also add Ralph Sherman to the Internal Review Round.

**Risk Element Reviewers & Approvers:**
1. Chemicals, Substances, & Organisms: James Karban
2. Insurance Requirements: Steve Kieff
3. Medical Information: Jon Allen
4. Minors on Campus: Reggie Miller; Steve Kieff
5. Personally Identifiable Information: Steve Kieff; Jon Allen
6. Special Dangerous Circumstances: Mark Childers
7. Student Information: Jonathan Helm; Jon Allen

Contracts with Information Technology Components: Jon Allen
7. **Internal Review Round Complete.** When the Internal Review Round is complete, you will receive a notification. Click on *Notifications* and then *Contract Internal Review Done* to go to the Contract.

Check Out the Contract.

If there are no additional Internal or External Reviews needed, the Contract is ready to submit for Approval.

8. **Formal Approval.** On the left side of the screen, click on the tab *Submit for Approval*.

9. **Approve the Contract.** The Approval by OGC is necessary to ensure that OGC has reviewed the contract and the Contract is ready for signature. If a Contract is submitted for Approval that has not gone through an Internal Review Round and has not been reviewed by the necessary parties, OGC can return the Contract to Draft status.

Click on your Notifications, then click on *Contract Pending Workflow Approval*. 

The Contract Header will note that the Contract is Pending Approval. Click on the Contract Actions dropdown, then click Approve. If the Contract needs to be returned to Draft status, click Return to Draft.

10. Search for the Contract. Once you’ve approved the Contract, if you log back in and search for the Contract (it is easiest to search by name or number), you will see that the Contract is Pending Signature. Once the Contract is fully executed, the Contract will be shown as Executed: Future or Executed: In Effect, depending on the Effective Date.

For more information regarding searching tools and creating reports, consult the TCM Quick Reference Guide.