

Contract Manager

Purpose	Set up CAREWare contracts that define provider funding, contract periods, budget limits, and available services.
Who should do this	CAREWare administrators, contract administrators, grant managers, and authorized provider-level users.
Use this guide when you need to	Plan a contract, establish its dates and funding, configure access and expiration behavior, or prepare it for contract items.
Main warning	Contract dates and funding affect service entry, imports, and federal reporting. Confirm the setup with grant leadership before saving.

Quick path Administrative Options > Service/Contract Setup > Contract Manager > Add

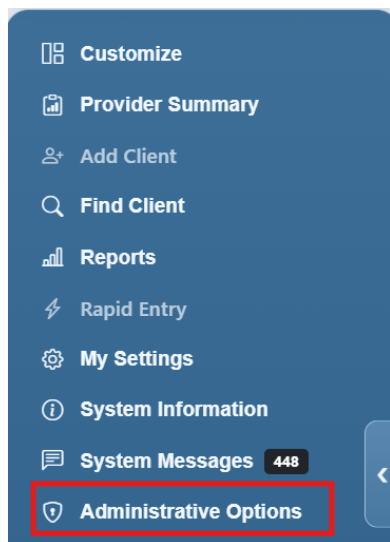
Before you begin

- Confirm the provider, contract name, start and stop dates, and funding source.
- Decide who may edit the contract and whether it should be controlled centrally.
- Discuss reporting-period impacts with grant managers and HRSA project officers when applicable.

Set up a contract

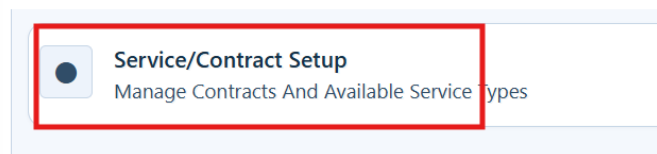
Contracts can be created in Central Administration or in the relevant provider domain. Administrators may define all contracts centrally and restrict provider-level editing by making contracts central only.

Step 1. Log into Central Administration or a Provider Domain. Click Administrative Options.



Step 2. Click Service/Contract Setup.

Administrative Options



Step 3. Click Contract Manager.

 **Service - Contract Setup**

Contract Manager

122 Active Contracts. 201 Total Contracts

Step 4. Click Add.

Manage

Add

Delete

Back

Print or Export

Column visibility

Copy

Contract Setup

Search:

<<

<

1

2

3

>

>>

Go to page

1

Contract Name	Start Date	Stop Date	Full Name
ALBERTA HEALTH SERVICES	01/01/2020		

Contract Setup Menu Options

Item	When to use it
Manage	Manage an existing contract.
Add	Add a new contract
Delete	Delete an existing contract.
Back	Return to the Service/Contract Setup menu.
Print or Export	Print or export a list of contracts.
Column Visibility	Hide/show columns in the contract list.

Step 5. If you are working in Central Administration, select the Provider.

Save

Back

Contract Manager

Provider Name:

Contract Name:

Step 6. Enter the Contract Name.

Contract Manager

Provider Name: 

Contract Name:

Start Date: 

Stop Date: 

Central?: ☒

Lock the contract when it expires: ☐

Grace period before locking expired contract:

Step 7. Enter the Start Date.

Contract Manager

Provider Name: 

Contract Name:

Start Date: 

Stop Date: 

Central?: ☒

Lock the contract when it expires: ☐

Grace period before locking expired contract:

Step 8. Enter the Stop Date.

Contract Manager

Provider Name: 

Contract Name:

Start Date: 

Stop Date: 

Central?: ☒

Lock the contract when it expires: ☐

Grace period before locking expired contract:

Step 9. Check each funding source that applies to the contract.

Contract Manager

Provider Name: 

Contract Name:

Start Date: 

Stop Date: 

Central?: ☒

Lock the contract when it expires: ☐

Grace period before locking expired contract:

Check the funding source(s) for this contract

Another Funding Source: ☐

City of Wassila: ☐

COVID: ☐

EHE Initiative: ☐

HIV services: ☐

HIV Services B: ☐

HIV Services TEST: ☐

Configure optional contract settings

Step 10. Configure the optional settings for the contract.

Setting	What it does
Central?	When checked, the contract can be modified only in Central Administration. When cleared, authorized users can modify it in provider domains.
Lock the contract when it expires	Prevents users from entering services after the contract end date, even when the service date falls within the contract period.
Grace period before locking expired contract	Sets the number of days after the end date during which users may enter services whose service dates fall within the contract period.

Step 11. Click Save.

Save

Back

Contract Manager

Provider Name:

Confirm the contract setup

After saving, review the contract record and confirm:

- The correct provider and contract name are displayed.
- The start and stop dates match the intended contract and reporting periods.
- All applicable funding sources are selected.
- Central control, expiration locking, and the grace period match the organization's policy.
- Authorized users can access the contract at the intended administrative level.

Important A newly-added contract has no [contract items](#). Contract items are required to activate services and can also be used to establish budget limits.

Troubleshooting and common questions

Are contracts required in CAREWare?

A provider domain needs to have at least one contract to add services to client records.

Who can edit a central contract?

A contract marked Central can be modified only in Central Administration by a user with the necessary permissions.

Related References

Document	Use it for
Contract Items	Add and edit contract items under each contract.
Funding Source Manager	Configure funding sources for contracts.
Subservice Manager	Configure subservices for contract items.