

# Frequently Asked Questions



## CLM REQUIREMENTS

### Will we be required to use the CLM tool for all RFRs? If so, when?

Yes, once the system is rolled out in early October, use of the CLM will be required for the following procurement activities: RFR, RFQ, Renewal, Amendment, Emergency, Interim, and due diligence posts. This also applies to POS RFRs, RFQs against Statewide Contracts (SWCs), or Departmental MAs. Due to the numerous statewide contracts requiring Request for Quotes (RFQs) and the differing requirements for each contract, OSD is continuing to develop policies regarding the use of CLM for creating and executing RFQs. Until formal guidance on this topic is released, CLM use is not required for RFQs.

### Are all stages of the CLM system required — specifically the document review being facilitated during development?

Yes, you must use all the stages of the system.

### Do we have the option of not doing this electronically?

No.

### Can we still use COMMBUYS separately for construction advertisements?

Yes.

### Are subscriptions required to go through this process?

Yes, but you are not required to pay for or manage those subscriptions.

## STAFF USERS/ROLES

### What happens if the team/individuals who create the bid is/are not the same as those who post the bid to COMMBUYS?

At least one person from the team creating the bid must have a COMMBUYS account.

### Do all staff and/or every member of the strategic team need access to COMMBUYS?

At a minimum, and generally speaking, only one strategic team member must have a COMMBUYS ID.

### Are all Commonwealth emails included among the list of users in the CLM?

Only those COMMBUYS users who have CLM access will be included in the selection list. You may add email addresses to the document collaboration feature by selecting "External User" and entering the email addresses.

### The roles described in the approval path of the bid posting do not reflect our agency's process. How can that be adapted or adjusted to unique roles and processes of each agency?

The Working Document Collaboration section allows you to include anyone within or outside your agency, in accordance with your policies and procedures. Approvers may be added as needed based on your agency's practice.

### Is it possible to update the contract owner after award to accommodate staff who have left?

Yes.

### Regarding CLM internal approval paths and contract release to vendors and providers: How does this system manage the plethora of contract review/ approval pathways for contract execution (e.g., 40+ unique signatories with signature authority with a specific relationship to 45 different organizational units (applies to both POS and goods/services contracts in my agency (DCF, aka DSS)?

There is no limit to the number of approvers that may be added to the CLM. The CLM tool allows for multiple approvers and as many unique signers based on the needs of the contract.

### For approvers, will we be able to have delegates? We do not expect our executive staff to learn how to log into this application to provide the approvals.

You will be able to delegate.

### How does the system accommodate a process by which workload is performed by delegates and signatures entered by separate unique humans?

The system supports multiple user roles. Individuals may be granted one or more roles.

### How does the CLM connect with the DocuSign process via CTR?

COMMBUYS CLM supports Adobe Sign — an approved CTR platform.

## VENDOR QUESTIONS

### Where is the vendor information coming from that moves to CLM?

Some of the information about a newly awarded vendor is imported from the COMMBUYS vendor profile. Other information is entered by the Contract Manager. For the initial data import of agency contracts, this information is provided by the agency using the data import template.

### Are vendors aware of this change and will there be training for them?

Vendors do not have access to CLM.



OPERATIONAL SERVICES DIVISION

**Does this system accommodate the fact that the same provider or vendor organization may have separate contract managers and approved signatories for different types of contracts even within the same organization and even when engaged with the same state agency?**

Each CLM contract form with a vendor includes contact fields that are specific to the contract- and these fields may be revised during the life of the contract.

**Once the contract has been approved, does the system allow changes to contracts, signatories, etc. (both internal and external) through the life of a contract?**

Yes, changes may be made through the contract's lifecycle.

**How do we accommodate vendors and providers who are not able to receive electronic documents via CLM and apply electronic signatures?**

In addition to Adobe Sign, CLM accommodates wet signatures.

**How would the identification of a small or diverse vendor work in this tool?**

Diverse vendors may be searched within COMMBUYS. The CLM does not interface with the SDO Certrak platform.

**Is OSD and SDO working together to integrate the two systems (CLM and COMMBUYS) in any way to avoid duplication in data entry?**

COMMBUYS and the SDO Certrak platform are integrated.

**If the vendor isn't registered in the system, do they need to register themselves before a department can tag them to a contract?**

Yes, they must be registered in COMMBUYS so they may respond to a bid and be awarded a contract.

**How would you handle change in contractor identity transactions?**

The Contract Identity change form is incorporated into the CLM tool.

**Does the system allow unique fields of the CLM contract forms to be edited once released?**

The CLM tool allows for recall of a contract form to make edits, corrections, and changes as necessary.

## **CLM FUNCTIONALITY**

**Who will be able to see what is in this tool? For example, when looking to see contracts for a vendor would an agency be able to see that a vendor has a contract, and would another agency be able to open and view the contract?**

From a CLM perspective the answer is no, however, the documentation is in COMMBUYS, which is a public-facing platform.

**How does CLM accommodate amendments for both "Open" and "Rolling" procurements that may have a 10-year procurement duration, especially for POS? Must we use the CLM for Open Enrollment bids?**

The CLM tool should be used to draft rolling enrollment bids and execute the resulting contracts. Rolling enrollment bids should be awarded in COMMBUYS and a CLM contract record should be created for each. Please make sure that rolling enrollment time periods are reasonable in duration. This will be a future compliance check.

**Are there file size limits for the contract zip files that are uploaded?**

No, there are no size limits on zip files uploaded to the CLM.

**How are subcontracts (Or Amendments, assignments, etc.) tied to a main contract managed?**

The CLM tool supports all contract creation. Subcontracts between the vendor and a third party may be attached, as necessary. The Commonwealth's Standard Contract Terms and Conditions cover subcontracting.

**How does this system accommodate non-procured contracts (e.g., legislative exemptions, contracts not bound by 801 CMR 21.0, emergency contracts, departmental contracts following of notice of intent, as examples)?**

All contracts will be created in CLM regardless of competitive procurement.

**Will this also be required for all Staff Augmentation contracts that use statewide contract?**

Yes.

**Do Program Opportunity Notices (PONs) go into CLM?**

No, they do not since they are grant awards.

**What if the PON Grant award is off PRF74?**

Purchases from a SWC would necessitate the use of COMMBUYS CLM.

**Does contract information interface to MMARS?**

No.

**What is data injection? How do we add other attachments with the RFR in the CLM?**

Data injection is the process by which data, e.g., text, dates, etc., in CLM is automatically transferred into a document template. Attachments are added/uploaded via the Package Documents tab in the Bid Package form.

## COMPLIANCE

### **Does "Complete Procurement File" refer to RFQs under statewide contracts or ONLY RFRs?**

It means all procurements (RFR, RFQ, Renewal, Amendment, Emergency, Interim, Due Diligence).

### **In some cases, for RFQs we may not have a Q&A. How will this be handled when OSD tracks?**

It will be noted that it was for an RFQ not an RFR.

### **Does CLM serves as a "duplicate" to our own internal electronic contract files?**

CLM will serve as a replacement. Agencies are free to duplicate efforts if they choose to do so.

### **Are agencies required to ensure compliance with document retention within the CLM. If so, how can we do that and simultaneously comply with separate retention requirements?**

Agencies may use CLM as their primary storage so long as they keep records in accordance with the Retention schedule. There is no need to duplicate efforts unless an agency opts to do so. Agencies are not expected to transfer existing contracts into CLM; only to use it for new contracts upon rollout.

### **How will Grants and Legislative Earmarks be handled in both the CLM and COMMBUYS procurement file requirements?**

Grants should be noted as part of the procurement vehicle but will not be explored as they are not within OSD purview.

## TRAINING

### **Will you be sending out a schedule for when this goes live and additional training dates?**

The CLM is expected to go live in early October. The Training schedule is available in MassAchieve and there are three tracks: [Procurement Staff](#), [Approvers](#), [Organization Administrators](#).

### **Will there be step by step job aids on CLM?**

Yes.

### **Is "MyPath" accessible only to Executive Agencies?**

MassAchieve/My Path was launched with a focus on serving the learning needs of Commonwealth executive department agency employees. Currently, the MassAchieve team is evaluating access options for those who are not executive department agency employees, including contractors, interns, temporary staff and other non-executive department users and organizations. We will share updates as they are available.

### **Is the CLM training for all staff?**

Yes, their role within CLM will determine the training path.

### **For CLM training in Zoom, will it be interactive on the part of us accessing CLM during the training?**

Yes.

## MISCELLANEOUS

### **How does CLM fit into the BEST project?**

The CLM will not be part of the BEST project.