

Guide: Renewing Contracts in COMMBUYS CLM

This guide shows how to:

- [Determine whether the Original CLM contract record included options to renew.](#)
- [Create a CLM Contract Amendment](#)
- [In COMMBUYS, change the related MBPO's end date.](#)

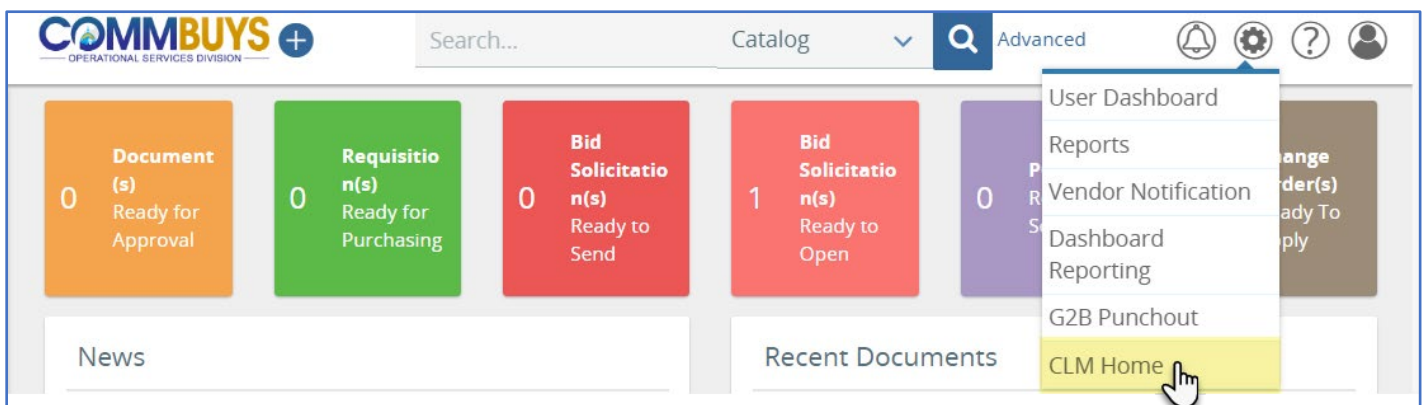
Of Special Note: In CLM, each contractor has its own Contract record. A Master Agreement may include several vendors, but CLM contains individual contract records for each contractor. Therefore, renewals must be completed for each contractor.

In order to renew a contract, the original Request for Response must have included options to renew. This guide will show how to create renewals when the CLM contract record was formatted for renewals *and* how to create a renewal when the contract record mistakenly did not include renewal options. In instances where a contract has exhausted its renewals, but a new agreement is not yet in place, procurement staff must request an Interim Contract (in advance of the Contract's end date) through the [Procurement Exceptions](#) process. Once OSD approves the request, buyers can follow this guide to extend the dates.

Users must sign in to the COMMBUYS CLM platform using Single Sign On, then go to the COMMBUYS CLM Homepage ([See job aid](#)) .

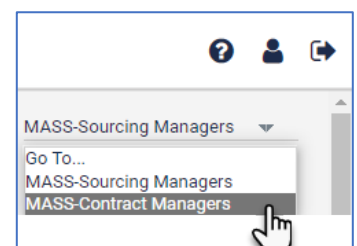
From the COMMBUYS Homepage:

1. On the top right of the page, click the "settings" icon and select **CLM Home** from the dropdown menu. A new tab opens displaying the CLM Home Page.



From the CLM Home Page:

2. Make sure the Contract Management home screen is selected. The role selection drop-down menu is located on the right side, just below the tool bar.
3. Open the Contract record for a vendor whose contract you want to renew. Some options for finding and selecting a contract from the Contract Management home page include Simple Search, the "Executed" area of the **My Contracts** box, and



selecting the Contract End Date from the CLM Calendar display. Note that for multi-vendor contracts, complete the following steps for each contracted vendor. (See figure below.)

The screenshot shows the COMMbuys CLM interface. At the top, there are navigation links: HOME, MY LIST, REPORTS, CREATE, and a search bar. Below this, there are three main sections: 'My Vendor Contracts' (7 total), 'My Master Contracts' (2 total), and 'All Org - Contracts' (2416 total). The 'My Vendor Contracts' section has a red box around the 'Executed' filter (2). The 'All Org - Contracts' section has a red arrow pointing to the 'Simple Search' bar. Below the filters, there are two calendar views for May 2023 and June 2023. A hand cursor is pointing at the date 30 in the June 2023 calendar, which is highlighted with a red circle and a tooltip showing '13 51'.

- Determine whether the CLM record includes Renewal options. When the Contract record opens, Scroll past the Contract Information section to the Contract Dates section. Options to renew may be listed. Below, the example shows three renewal option of only one month each. When no options to renew are listed, the **Renewal** field indicates "None."

The screenshot shows the 'Contract Dates' section. It includes fields for 'Effective Date' (03 - 01 - 2023), 'Renewal' (Options), and 'End Date' (03 - 31 - 2023). Below these is a table with three rows of renewal options, each with a duration of 1 month. The table is highlighted with a red box.

Option Period	Duration (months)	Exercised	Start Date	End Date
1	1	Select Option	04 - 01 - 2023	04 - 30 - 2023
2	1	Select Option	05 - 01 - 2023	05 - 31 - 2023
3	1	Select Option	06 - 01 - 2023	06 - 30 - 2023

Below the table are links for '+ Add Row' and '- Remove Row'. At the bottom, there are fields for 'Expiration Notice' (90 Day), 'Expiration Notice Date' (12 - 31 - 2022), and 'Termination Date' (MM - DD - YYYY).

The screenshot shows the 'Contract Dates' section. It includes fields for 'Effective Date' (04 - 01 - 2020), 'Renewal' (None), and 'End Date' (03 - 31 - 2023). Below these are fields for 'Expiration Notice' (90 Day), 'Expiration Notice Date' (12 - 31 - 2022), and 'Termination Date' (MM - DD - YYYY).

5. To create a contract amendment in either case, click on the **Contract Amendment tab**, then click the **NEW** Button. A new window displays showing a Contract in Draft status. The breadcrumb hyperlinks below show the Vendor Record name > the original Contract Record number > the Amendment Number.

Contract (Draft)

> VENDORNAME
> CON1701026 > AMEND1701027

1

2

3

4

5

Draft
Approval
Negotiation
Signature
Active

Contract
Package Documents
Hierarchy

6. The first section is **Contract Information** for the amendment. Several fields auto fill with data from the Contract Record. Note that most of the sections displayed for Amendment creation are identical to those from the initial Contract Record.

Field Name	Description
Document Number	Autofills from Contract record (the example shows the field empty)
Type	Select Amendment from the drop-down menu.
Description	Copies forward from Contract. Amend as needed. Data injects into the amended Standard Contract Form
Procurement Type	Select Amendment to Date, Scope, Budget
Contract Value	Carries forward from Contract record. Amend of desired. Example shows blank field.
MMARS Department Code	Carries forward from Contract.

Contract Information

Statewide Contract:

Document Number:

Contract Category:
Amendment

Type:
Amendment

Name:
DB - Renew 03212023 - Departmental Blanket - Renewal Demo Part 3

Description:
Amend Description

Procurement Type:
Amendment to Date, Scope, Budget

Agency:
Department of Departments
- 1021

Business Unit:
Finance
- DFS

Governing Law State/Prov:
Massachusetts
United States

Contract Value:

MMARS Department Code:
DDD

7. Scroll down to the next section: **Amendment Dates**.

Field Name	Description
Effective Date	Type in or select the beginning date of the amendment.
Expires with Contract	Select No if the Options to Renew were listed in the Contract. Select Yes if the Options to renew were not listed in the Contract.
End Date	Type in or select the end date for the amendment.
Type	Select Renewal from the drop down menu.

Amendment Dates

Effective Date: 04 - 01 - 2023 *

Expires with Contract: ☐ Yes ☒ No *

End Date: 04 - 30 - 2023 *

Type: Renewal *

NO if options to renew are listed.
YES if options are None.

8. Scroll down to the **Contract Date** section. Listed there are the dates for the original contract period. Below that are listed the Renewal Options entered at the time of contract execution. If no options are listed, skip this section. If options to renew are listed, select **Yes** in the **Exercised** column. In this scenario, the original Contract Record will reflect the original contract period and reflect the fact that the renewal option was exercised.

Contract Dates

Effective Date: 03 - 01 - 2023

Renewal: Options

End Date: 04 - 30 - 2023

Option Period	Duration (months)	Exercised	Start Date	End Date
1	1	Yes	04 - 01 - 2023	04 - 30 - 2023

Expiration Notice: 90 Day

Expiration Notice Date: 12 - 31 - 2022

Termination Date: MM - DD - YYYY

9. The next two sections may not need updates.
- If the contract renewal includes negotiated changes to SDP or Prompt Pay Discount, record those changes in the **Contract Payments** section.
 - The **Contract Categories** section displays the available categories from the contract record. The vendor categories assignment may be edited at this stage, though no additional categories can be added.
10. The **Contract Document** section includes the template for the Standard Contract form, which must be produced and signed in order for an amendment to be executed. As with the initial Standard Contract Form, the template's appearance depends on whether signatures on the form will be obtained electronically (preferred) or through a paper process. Since selecting between these options is not possible at this stage and since additional fields may be edited before form editing begins, skip over the Contract Document section at this time.

11. The **Approvers** section is identical to Approvers sections on other forms. Use the Look-up tool (magnifying glass) to look up and select a department approver and a legal approver.

Field Name	Description
Approval Method	Use the down arrow to display choices and select the most appropriate. Choices are Serial and Parallel.
Submitted For Approval By	Use the Look-up Tool to find and select approvers. Be sure to enter a due date.
Legal Approver	This is required for the Standard Contract Form. Use the Look-up tool to select an approver, assigned by your agency's Organizational Administrator. Enter a due date.

The example below shows fields completed.

Approvers

Contract Manager:

Approval Method:

Submitted For Approval By:

	Name	Title	Status	Due Date	Notes
	<input type="text" value="Michael Phillips"/>		Required	2022 - 11 - 02	<input type="text"/>

[+ Add Row](#) [Remove Row](#)

Legal Approval:

ACPO Approval:

Agency Head Approval:

CCPO Approval:

Legal

Name:

Due Date:

Notes:

Click **SAVE** at the bottom of the page

12. Skip over the **eSignatures** and **Business Metrics** sections for now.
13. Edit the Vendor Details and Legal Address sections if changes to the Vendor's information are required.
14. Edit the Notice Address (agency information) or the Billing Address (Agency payment processing information) if changes are necessary.
15. Before returning to the Contract Document section to generate and edit the Standard Contract Form for the amendment, you must select how the signatures on the document will be gathered. The default template is for an e-sign process; COMMBUYS CLM uses Adobe Sign, which requires an active license assigned to the email of the logged-in user. If a paper process will be used, the template must be changed.
- Scroll to the **eSignatures** section. If electronic signatures will be used, leave the default Signature Type **eSignature** and the default eSignature Delivery Option **eSign immediately**.
 - Enter the Vendor's Authorized Signer information, information for an internal reviewer, and finally, information for the agency's Authorized Signer.

- Click **SAVE** at the bottom of the page.

A eSignatures

Signature Type: eSignature *
 Status: Data Entry
 eSignature Delivery Option: ☒ eSign Immediately ☐ Complete in AdobeSign

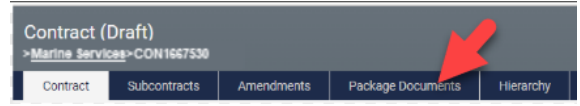
B

eSigner Type	Order	Name	Title	Email
Vendor	1	Saline Ryan	Business Manager	test@periscopeholdings.cm *
Reviewer	2	Marilee Weeroll	Sourcing Manager	instructor04@mailinator.com *
Commonwealth	3	Arthur I. Zignature	CPO	instructor04@mailinator.com *

If signatures will be obtained with a paper process, click the down arrow in the **Signature Type** box and select **Paper Signature**. Then click **SAVE** at the bottom of the page, which changes the Contract Template to the paper version.

eSignatures

Signature Type: Paper Signature *

- Editing the Standard Contract Form. Return to the **Contract Document** section which includes a template for the Standard Contract form that matches the signature types you will be collecting.
 - In the **Current Working Document** field, click on the hyperlink for the template. The document downloads. Note the Document name has changed from the template name to reflect the CLM naming convention (in this case, the Document Number of the contract and the name of the business being awarded).
 - Open the document (MS Word) and enable editing. Edit the document as needed.
 - Click **Save** (in MS Word), leaving the default name in place, or **Save As** to change its location. Do not alter the auto generated file name. Close MS Word.
 - Return to the CLM Contract page and click the **Upload** button to replace the template with the new document.
 - Click **SAVE** at the bottom of the page.
- Relevant attachments may be uploaded in the **Notes and Attachments** section.
- Package Documents** may be required for some contract amendments. For example, if the renewal includes new pricing, or the vendor has new authorized signatories, these documents should be produced and stored through the Package Document area. Package documents will eventually include templates. Until templates are available, obtain required documents outside of CLM and use the following steps to process each form in CLM. Required contract documents are available on the [OSD Forms](#) page and from the [Office of the Comptroller](#).
 - At the top of the Draft Contract (the amendment) are several tabs in a navy-blue stripe. Click the tab marked **Package Documents**.
 
 - When the screen refreshes, the screen title has changed to **Contract Package Documents**. Click the **New Button**. A new window opens labeled **Package Document**. The first information box is pre-filled with data from the draft contract.

Contract Package Documents
Marine Services

Revision: 6

Contract Subcontracts Amendments Package Documents Hierarchy

Form [v] Revision [v] Signed [v] Form Type [v] Description [v] Status [v]

NEW REFRESH

- In the **Package Document Information** subsection, select the Document Type from the drop-down menu. Options include Prompt Pay Discount, Supplier Diversity Plan (SDP) Form, Standard Contract Form Instructions and Contractor Certifications, Commonwealth Terms and Conditions for Information Technology Contracts, W-9, Electronic Funds Transfer (EFT), Authorized Signatory Listing (CASL), Vendor Price File, Change of Identity Form, and Other. Also enter a due date, then click **SAVE** at the bottom of the page.

Package Document

Revision

Contract Information

Statewide Contract Form Number: MBT1667525

Statewide Contract Title: Watercraft Products

Contract Document Number: WTR14_pm

Contract Name: Catering and Banquet Serv

Package Document Information

Document Type: Authorized Signatory Listing (CASL)

Date First Sent: - -

Current Date Sent: - -

Count Sent: 0

Date Due: 02 - 14 - 2023

Date Received: - -

Date Verified: - -

Notes:

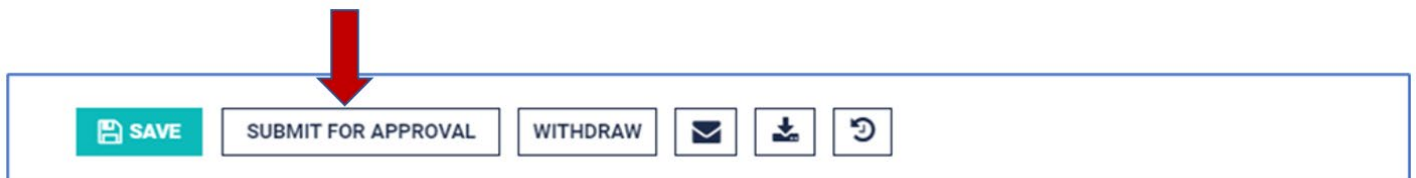
SAVE

- The page refreshes with a **Contract Document** section for the chosen document. As with other CLM documents, the **Working Document** subsection includes a template (for the chosen package document) to be edited and replaced and an optional **Working Document Collaboration** tool if collaboration is desired for the document.
- If the forms obtained outside of CLM are Adobe Sign compatible and signatures will be acquired through CLM's e-signature, replace the template with the appropriate form:
 - Click the **Upload** button in the working document section, select the desired form, and click **Open**.
 - Click **Save** at the bottom of the CLM page. An error message may appear warning that the document is not a template. This is ok.
 - Complete the **E-Signatures** section. Select the number of signers for the form and enter details for each signer.
 - Click **Save** at the bottom of the page, then click the **Esign** button. An **e-Signature** pop-up box appears. Click the **Send** button.

- If the forms obtained outside of CLM are not adobe sign compatible, you will distribute them to the vendors by other means. Once all signatures are complete for a document, scan it being sure to name it to reflect the form type (example: CASL).
 - a. Once signatures are received, follow the package document instructions above A-D. In the Contract Document Section, skip down to the **Complete Document** sub-section. Upload the completed, signed document and click **Save** at the bottom of the page. Note that the name of the document changes to a CLM generated one.
 - b. Click the **Sent to Vendor** button at the bottom of the page, then click the **Complete** button and finally the **Verified** button.
 - c. The Package Document Status changes to **Package Document (Verified)**. Click the Amendment number (Amendxxxxxx) in the breadcrumb line to return to the contract draft.
- This process should be repeated until all necessary package documents for the amendment are complete.

Package Document (Verified)
 > Sir.Loin.Catering > CON1667530 > AMEND1701349 > PKGDOC1701349-0001

19. Back on the Contract Amendment Draft page, click **Submit for Approval** at the bottom of the page. This will send the edited Standard Contract form and the other contents of the Contract Record to the approvers specified in step 11.



20. Once the Approvals are complete, which may take several days, it's time to send the document around to be signed.

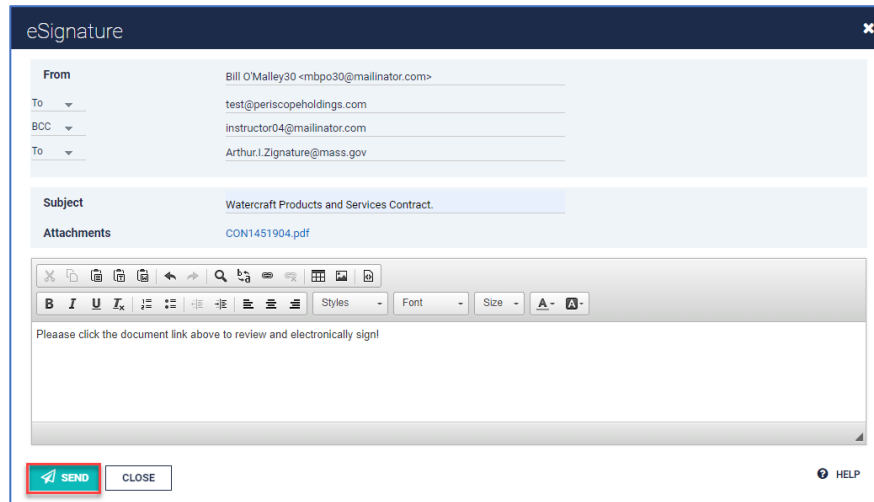
If electronic signatures have been selected;

- An **ESIGN** button appears at the bottom of the page. Click that button.



- An email box appears which includes the document to be signed and a space for including a message. Click the **SEND** button and then click **OK** in the warning box.

The ESIGN feature sends the document to each addressee for signature, in order.



If paper signature has been selected, the options are different.

- A **Sent for Signature** button appears at the bottom of the page. Clicking this button indicates that the approved Standard Contract Form has been sent to the vendor for signature via mail, e-mail, or fax outside of the CLM tool.



- Once authorized signatures are complete, click the **Signed** button to mark the Standard Contract Form as Signed, and then upload a scanned copy into the CLM **Signed Document** box. Be sure to maintain the CLM assigned document name.

21. Once the documents are signed and so indicated in CLM, the Contract Amendment is complete. The gray bar at the top of the page indicates the Contract amendment is Executed (yellow highlight) and Active (red box). The next step is creating a Change order to the COMMBUYS Master Blanket Purchase Order.



From the COMMBUYS Homepage: Updating MBPOs with new Contract End Date

22. From you COMMBUYS Home Page, click the icon for Blankets



23. Click the tab labeled **sent**, then find the MBPO you must update and click its hyperlink.

In Progress Ready for Approval Returned Ready to Send **Sent**

1-2 of 2 << < 1 > >>						
Contract #	Description	Contract Type	Buyer	Organization	Vendor	Sent Date
PO-22-1080-OSD08-OSD08-25502	WTR300ESP - Commercial and Recreational Watercraft Products and Services	SW	Erin Powers	Operational Services Division	ATLANTIC BOATS INC	07/12/2022
PO-22-1080-OSD07-OSD07-25553	TRN500 - Training Services for Management, Leadership, and Business Tools		Erin Powers	Operational Services Division	X Ample Company	03/09/2020
1-2 of 2 << < 1 > >>						

24. COMMBUYS opens the MBPO on the **Summary Tab**. Click the **Changes Orders** tab. A new Change Order window opens, displaying its **Summary Tab**.

25. Click the **Control** tab and change the Master Blanket/Contract End Date to the end date of the amendment, then click **Save & Continue**.

Change Order (In Progress) - Master Blanket Purchase Order PO-22-1080-OSD07-OSD07-25553 Status: 3PS - Sent

General Items Subcontractors Distributors **Control** Attachments(1) Summary [Back to PO](#)

General

Master Blanket/Contract Begin Date*: 03/09/2020

Master Blanket/Contract End Date*: 03/11/2026

Cooperative Purchasing Allowed ☐

Organization	Department	Dollar Limit	Dollars Spent to Date	Minimum Order Amount	Delete All
1080 - Operational Services Division	OSD07 - OSD TRAINING	0.00	\$0.00	0.00	<input type="checkbox"/>
1080 - Operational Services Division	Add New: <input type="text"/>	0.0	\$0.00	0.0	

Dollar Limit set to 0 indicates no limit.

Save & Continue **Reset**

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26. Information on other tabs may be edited as well, depending on the circumstances of the amendment. For example, if there are files relevant for purchases from the Master Blanket such as Price Files, upload them from the **Attachments** tab. Be sure to click **Save & Continue** any time you change details.

27. Click the **Summary Tab** again, and type in a description of the changes, then click **Submit for Approval** at the bottom of the page. Once the Change Order is approved, the details are incorporated into the MBPO and the Vendor is notified about the change.

Change Order (In Progress) - Master Blanket Purchase Order PO-22-1080-OSD07-OSD07-25553 Status: 3PS - Sent

General Items Subcontractors Distributors Control Attachments(1) **Summary** [Back to PO](#)

Comment for the whole change order:

Contract renewal option; changed contract end date.