

Frequently Asked Questions

CLM Training



Q: Are field names adjustable?

A: Field names are locked.

Q: Are schedules adjustable?

A: Prepopulated timeline dates may be manually changed as necessary.

Q: Will the Sourcing Strategy step be required?

A: No, unless it is a waiver or exception request.

Q: Do all members of the Sourcing Strategy Team need access to CLM?

A: No. CLM allows for external collaboration on documents such as an RFR. However, a CLM account is required for any approvers.

Q: Is a Strategic Sourcing Team (SST) charter included on Strategy/Bid Package?

A: Currently, the Charter is not included in the CLM documents. It may be found on the OSD Forms webpage and may be uploaded to the CLM Strategy.

Q: Do approvers need to have a COMMBUYS profile?

A: Yes, you need a COMMBUYS profile to approve. You do not need a COMMBUYS profile to use eSign.

Q: Do you need a COMMBUYS profile to access CLM or just a CLM user profile?

A: Users must have access in both (COMMBUYS & CLM) to use CLM. You will login via Single Sign on (SSO).

Q: Will the Statewide Contract (SWC) number references be amended to include Departmental numbers for agencies?

A: This process will remain the same – it will not be changed for departments.

Q: What if we are posting the WTO and the RFR at the same time? Would we still select WTO and then select RFR for the type during the WTO phase?

A: The WTO may be posted when the CLM Bid Package is in "Intent" status, and the RFR may be posted when the bid package is in "Draft" status. One or both documents may be sent to COMMBUYS prior to the COMMBUYS bid being posted. The purpose of the WTO is to meet the obligation to allow a 40-day window between the posting of an Announcement or an RFR and the vendor deadline (bid opening date) for Goods and Services Procurements.

Q: Will the COMMBUYS approval paths automatically populate in CLM?

A: COMMBUYS approvals and CLM approvals are separate and approval paths will not be pre-populated. CLM does not have approval paths and all approvals must be selected manually for each procurement/transaction.

Q: Does OSD need to know what changes are being made to a document while it's still a draft within an agency?

A: OSD intends to review only final documents. It is good practice to include notes and draft documents.

Q: When you select the SWC, will a hyperlink be available for the Statewide Contract User Guide?

A: No, a hyperlink does not exist currently.

Q: If the Bid Document is reassigned, will the new purchaser have access to create the CLM contract?

A: COMMBUYS will allow the new purchaser to create CLM documents so long as they have CLM permissions on their account.

Q: Do we need to compare both MMARS and COMMBUYS to ensure the vendor information is same?

A: Vendor information in CLM is the same as COMMBUYS, but departments are responsible for ensuring that information is accurate and matches what is in MMARS. Vendor data in COMMBUYS and CLM is entered by the vendor and may be inaccurate.



OPERATIONAL SERVICES DIVISION

Q: Will the Comptroller (CTR) accept the new formatting on the Standard Contract Form (SCF)? Or will we need to have vendors sign two different SCFs? The approved one for use now is in an alternative format. Is CTR aware of the CLM?

A: The Comptroller's Office is aware of CLM, and the SCF generated by CLM is acceptable to use. Users should be aware that when CLM generates the SCF it may add spaces making the SCF two pages and this is allowed.

Q: Is it possible to have a targeted training set up for each agency?

A: OSD is reviewing the possibility of offering targeted training sessions for individual agencies, but at this time none are scheduled.

Q: When does OSD expect agencies to be fully compliant with the usage of CLM?

A: New procurements and renewals initiated as of October 3 must be fully compliant with CLM requirements.

Q: Does the procurement file have to include draft documents?

A: Yes.

Q: May we use automatic approval like in COMMBUYS?

A: CLM does not offer automatic approval.

Q: Once the collaborators have completed their review/ edits how does the most updated document get uploaded to CLM and then redistributed to the entire team for additional review, if necessary? How do we know that the document being submitted for approval is the 'final' version?

A: The user submitting for approval is responsible for making sure the document is the 'final' version. Once a round of reviews/edits has been completed, the document may be reshared as many times as necessary for the document owner to be certain that additional review has been completed. In addition, collaboration in CLM is not mandated as part of CLM requirements and collaboration may take place offline using current methods so long as the final document is uploaded to CLM for approval.

Q: In general, is it necessary to obtain legal approval in the procurement process? If our agency does not have a legal team, who may be assigned as the legal counsel?

A: OSD mandates legal approval as part of the procurement process. If your agency does not have a legal counsel to perform legal approval, please reach out to OSDLegal@mass.gov to discuss.

Q: Is there a CLM administrator at each agency?

A: The COMMBUYS Organization Administrator will act as the CLM admin for their department/agency.

Q: Will agencies have access to a test region of CLM?

A: OSD will not be providing a test region for departments.

Q: Is CLM limited to only one eSign system?

A: Agencies will only be able to use Adobe Sign for signature in CLM. A wet signature is also acceptable.

Q: Is there a file size limit for attachments in CLM?

A: There is no file size limit for attachments in CLM, but please be aware that extremely large attachments may take longer than usual to upload/download. CLM does allow for compressed or zip files to be attachments.

Q: Will OSD consider postponing go-live until agencies have had more time to establish all the roles CLM requires?

A: There will be no postponement of CLM, and departments will be mandated to follow CLM requirements for all procurements dated October 3 and beyond.