

TOTAL CONTRACT MANAGER

B2P Training Resources b2p.procurement.harvard.edu/contract-management
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DOCUMENT TYPES FOR INDEXING

The intent of this indexing sheet is to provide a list documents that should be uploaded into Total Contract Manager (TCM), however, you can easily upload all contract related documents to TCM if you so choose. Please use this sheet in conjunction with the TCM Document Naming Convention to ensure uploads are properly titled in TCM.

Contract	Procurement Notes
<ul style="list-style-type: none">Contract (the signed contract and accompanying exhibits, attachments, and riders)<ul style="list-style-type: none">Signed NDA, Memorandum of Understanding, or Letter of Intent<ul style="list-style-type: none">Memorandum of Understanding may be uploaded in place of a contractStatements of Works (the signed SOW and any accompanying exhibits, attachments, and riders)<ul style="list-style-type: none">This includes signed proposals	<ul style="list-style-type: none">Email CorrespondenceMiscellaneous<ul style="list-style-type: none">RFP, RFP responses (unless stored in the sourcing module)Accessibility RoadmapVPATAccessibility Waiver
Amendment	Confidential – Proprietary (Contractor)
<ul style="list-style-type: none">Amendment<ul style="list-style-type: none">This includes amendments to the following types of documents: Change Order, Master Service Agreement, Statement of Work, and Contract Riders	<ul style="list-style-type: none">Independent Audit ReportConfidential pricing informationVendor Risk AssessmentAudit Reports
Independent Contractor Questionnaire	Cure and Termination Notices
<ul style="list-style-type: none">Executed ICQICQ Waiver/ExceptionAny documents associated with establishing a vendor as an Independent Contractor	<ul style="list-style-type: none">Cure NoticeTermination NoticeContractor's Response to Termination Notice(s)Resolution of Cure