1. <u>Introduction</u>

Overview

The TDHCA Community Affairs Contract System is designed for subrecipients of Community Services and Energy Assistance programs. The system allows subrecipients to view their contracts and submit performance and financial reports through the Web.

TDHCA is launching the system in January 2008 for the Community Services Block Grant. The Department will phase out most use of the current CA Contract Systems accessed through Teraterm as program years begin for other Community Services and Energy Assistance programs. The old systems will remain available for historical data lookup.

🗍 Note
Throughout this user guide the system is referred to as *the TDHCA Community Affairs Contract System*, *the Contract System*, or simply *the system*.

System Requirements

The TDHCA Community Affairs Contract System is Web based. Teraterm is not used to access the system. You can access it through a standard internet connection using broadband or dial up. The system is designed for use with Microsoft Internet Explorer 5+ Web browsers running on a Windows operating system. Use of other browsers or operating systems may result in unpredictable behavior. If necessary, download the appropriate browser software free of charge from the following Web page:

http://www.microsoft.com/windows/ie/default.asp

Please note that you are not required to upgrade to Internet Explorer 7 in order to use the system, which has been tested with versions 5 and 6 as well.

In your Web browser configuration, you may need to enable JavaScript and also the ability to accept "cookies" (these are harmless electronic files placed temporarily on your computer to enhance functionality). These settings are the default for the Web browser. Refer to the help system in your browser if you are unsure of its configuration.

Some information in the TDHCA Community Affairs Contract System, requires Adobe Acrobat Reader. This software will allow access to files in Portable Document Format (PDF) and is free of charge. To download the latest version of Adobe Acrobat Reader, visit the following Web page:

http://www.adobe.com/products/acrobat/readstep2.html.

If you have general technical assistance questions about Windows, Internet Explorer, or Adobe Acrobat, please contact your technical support staff. If a question can't be answered by your technical support staff, please email our Information Systems Division

at: tsupport@tdhca.state.tx.us. You can expect to hear back from us within 8 business hours.

2. Getting Started

Accessing the TDHCA Community Affairs Contract System

To access the TDHCA Community Affairs Contract System, open your Web browser to the TDHCA Web site, www.tdhca.state.tx.us. From there click **TDHCA Interactive** on the left side of the page, and then click **TDHCA Community Affairs Contract System** under the **Contractor Tools** section.

The TDHCA Community Affairs Contract System Web page contains links to this user guide, the system access request form, and to the system itself.

Obtaining a User ID

To obtain a user account for the TDHCA Community Affairs Contract System, follow the instructions on the TDHCA Community Affairs Contract System Web page.

Log On

When you first receive your user ID from TDHCA, you will be provided with a password to log on to the system. Change your password the first time you log on. See *Passwords* for more information.

Open your Web browser to the TDHCA Community Affairs Contract System Web page and click **Login to TDHCA Community Affairs Contract System**. The login box shown in Figure 2-1 will appear.

Figure 2-1

Enter your User ID and password, and then click **Login** to access the system.

Log Off

To log off, click the **Logout** link shown in the upper right corner of Figure 2-2. Logging off prevents unauthorized access from an unattended machine.

Figure 2-2

Passwords

Passwords must contain eight characters, with at least one special character that is a number or symbol. Passwords are confidential and should never be shared.

If you lose or forget your password, contact the TDHCA Community Affairs Division. The current TDHCA contact information is maintained on the TDHCA Community Affairs Contract System Web page.

To change your password, click the **Change Password** link shown on the navigation bar in Figure 2-2. Enter User ID, old password, and new password twice, then click **Save**.

Figure 2-3

3. Overview of Contracts

This section provides the instructions needed for working with ***contracts.*** It is important to understand the terms as they relate to the system.

Contracts

A contract is a legal agreement between an organization and TDHCA for a particular program activity (i.e., CSBG) with an established contract schedule and budget. For instructions on how to navigate through the system as you work with a contract, refer to Section 4, *System Procedures for Contracts*.

4. System Procedures for Contracts

Contract Set Up and Approvals

In order to accept a contract award with TDHCA (the Department), TDHCA sets up the contract in the system and routes it internally for approval.

After approval occurs you may log in, click the `Inbox` link on the menu bar in the upper left-hand portion of the screen. Contracts available to you for viewing and signature will be visible under `Pending Contracts.` If you wish to view your contract prior to signature click `View&Print` before approving your contract. Please Refer to Figure 4-1.

△ Program Note
After the subrecipient signs the contract, it is routed for Executive approval. During this time, contracts are not available for viewing.

TDHCA Community Affairs Contract System

Inbox

Inbox - Subrecipient

PENDING CONTRACTS

Contract Number	Program	Year	Subrecipient	Contract Amount		
610000086	CSBG-USHHS	2007	Test Subrecipient	$150,000.00	Approve	View&Print

Figure 4-1

The contract will have an `Approve` link on the right side. Click the `Approve` link. You will arrive at the CONTRACT-APPROVAL screen. You will see a summary of the contract

at the top of the screen which includes the subrecipient name, contract number, amount, etc.

Below the contract information you see two check boxes, **Approve and Disapprove**. You may also view or print the CSBG contract by clicking on **View/Print** on this screen. *After you approve the contract, it will not be available to print again until after executive signature has been added by TDHCA.* Below the check boxes you will see a ROUTING HISTORY table, showing the areas that have approved the contract. Click the Approve checkbox and then click the **Save** button. Please refer to Figure 4-2 and Figure 4-3.

Figure 4-2

Figure 4-3

△   Program Note
If you do not click the **Save** button information entered will not be saved into the system

Once you have approved the contract, TDHCA will route the contract in the system for signature by the TDHCA Executive Director. You will not be able to view the contract at this time. After the Department has given executive approval and all signatures are completed the contract will appear in the **Active Contracts** table. This is the table where your contract and monthly reports will be located.

Any change to the contract after original signature will be treated as a *Contract Amendment* and will require Department and Subrecipient approvals as well as signatures. The amendment process will generally follow the original contract approval process. After signatures and approvals have been given, amended contracts will be viewable in the Subrecipient **Inbox** under **Active Contracts.**

Viewing Contracts

If you are not already in your **Inbox**, click the **Inbox** link located on the global navigation bar at the top of the screen. A list of your contracts will appear as shown in Figure 4-4. You may access a list of your contracts each time you log onto the system. Contracts that you have not approved may be viewed under **Pending Contracts**. After a contract is signed and approved by the subrecipient and has received all Department approvals then it will appear under **Active Contracts**.

Figure 4-4

System Note:
Links are highlighted in blue and underlined.

Contracts listed under **Active Contracts** may be viewed by clicking on the **Contract Number** for the contract you wish to view. Refer to Figure 4-5. Contract(s) listed here display general contract information such as the **Contract Number**, **Program, Year, Effective Date, Subrecipient, Contract Amount, Performance Report**, and **Expenditure Report**.

ACTIVE CONTRACTS

Contract Number	Program	Year	Effective |Date	Subrecipient	Contract Amount	Performance Report	Expenditure Report
610000086	CSBG-USHHS	2007	1/1/08	Test Subrecipient	$150,000.00	Ongoing	Ongoing

Figure 4-5

Click the contract number and you will be able to view *Contract-View Page 1* which is page 1 of the contract and includes: **Routing History, Program Basics, Subrecipient Basics, and Contract Details.** Refer to Figure 4-6.

Routing History displays the areas within the Department where the contract has been routed, the related approvals and the dates of approval.
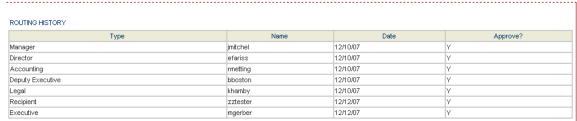
Contract - View Page 1

ROUTING HISTORY

Type	Name	Date	Approve?
Manager	jmitchel	12/10/07	Y
Director	efariss	12/10/07	Y
Accounting	rmetting	12/10/07	Y
Deputy Executive	bboston	12/10/07	Y
Legal	khamby	12/10/07	Y
Recipient	zztester	12/12/07	Y
Executive	mgerber	12/12/07	Y

Figure 4-6

Program Basics displays the name of the Program and the Program Year.

PROGRAM BASICS

Program	Community Services Block Grant	Year	2007

Figure 4-7

Subrecipient Basics displays the Name, Mail Code, Service Plan, Vendor ID, Contact (name) and Contact Phone.
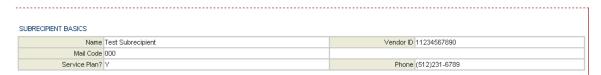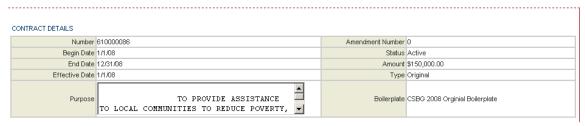
Figure 4-8

Contract Details displays the Contract Number, Begin Date, End Date, Effective Date, CSBG Fund Release Date, Purpose, Amendment Number, Status, Amount, Type and Boilerplate. The CSBG Boilerplate may be printed from this screen by clicking on **View&Print**.

Figure 4-9

Click **Next Page** at the bottom of *Contract-View Page1* and you will be able to view *Contract View (Continued)* *(page 2 of the contract)* which includes: **Contract Basics, Funding Details, Service Area Details, Budget Category Details, and Matching Budget Details.**

Contract Basics displays the Program (name), Subrecipient (Name), (Contract) Number, (Program) Year and Vendor ID.

Figure 4-10

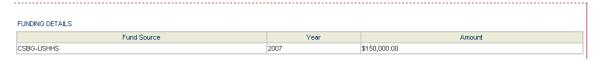**Funding Details** displays the Fund Source, Program Year, and Amount of the contract.

Figure 4-11

Service Area Details displays the Service Areas associated with the CSBG contract.

SERVICE AREA DETAILS
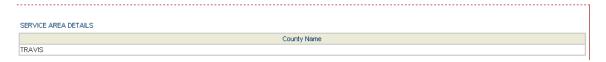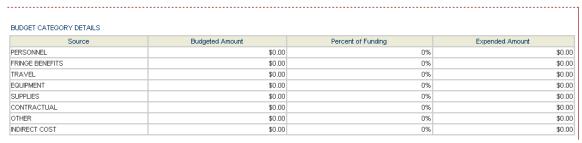
County Name
TRAVIS

Figure 4-12

Budget Category Details displays the CSBG budget categories and the total CSBG award amount. It may also display related percentages for each category if each category has a specific amount. The CSBG budget may not be adjusted by the CSBG Subrecipient.

BUDGET CATEGORY DETAILS

Source	Budgeted Amount	Percent of Funding	Expended Amount
PERSONNEL	$0.00	0%	$0.00
FRINGE BENEFITS	$0.00	0%	$0.00
TRAVEL	$0.00	0%	$0.00
EQUIPMENT	$0.00	0%	$0.00
SUPPLIES	$0.00	0%	$0.00
CONTRACTUAL	$0.00	0%	$0.00
OTHER	$0.00	0%	$0.00
INDIRECT COST	$0.00	0%	$0.00

[Previous Page]

Figure 4-13

*All CSBG budgets will initially display zero amounts in each of the categories since the total amount of CSBG funding is not known at the time of contract set up.

System Note:
The View/Print link may take a few seconds to produce the PDF file of the CSBG Boilerplate. This is due to the volume of existing requests submitted. If the system has too many requests within the time it has allotted to pull the file you may receive an error message. Please resend your request if this occurs.