## **Quick Reference for Managing Expiration of a Contract**

## **Email Notification and Worklist Procedures**

When contracts near expiration, department contacts will receive the following email

From: amber.floyd@usm.edu <amber.floyd@usm.edu> Sent: Wednesday, January 8, 2025 10:26 AM To: Jessica Whitten <<u>Jessica.L.Turner@usm.edu</u>> Subject: Contract Notifications for: SetID = USM01, Contract ID = PC000115

The following alerts apply for Contract SetID: USM01, Contract ID: PC000115, Version: 1. This contract begins on 2024-12-19 and is described as: TEST.

The supplier name is POCKET NURSE.

Contract is nearing or has reached its Expiration Date: 2025-01-01

URL: https://nam12.safelinks.protection.outlook.com/?

url=https%3A%2F%2Ffncir92.otr.usm.edu%2Epsp%2Ffncir92%2FEMPLOYEE%2FERP%2Fc%2FADMINISTER\_CONT RACTS.CNTRCT\_ENTRY.GBL%3FPage%3DCNTRCT\_HDR%26CNTRCT\_ID%3DPC000115%26SETID%3DUSM01%26V ERSION\_NBR%3D1%26Action%3DU&data=05%7C02%7CJessica.L.Turner%40usm.edu%7C9f9d4db630cb41f7729 608dd3001307c%7C7f3da4be2722432ebfa764080d1eb1dc%7C0%7C0%7C638719503877861144%7CUnknown% 7CTWFpbGZsb3d8eyJFbXB0eU1hcGkiOnRydWUsllYiOilwLjAuMDAwMCIsIlAiOiJXaW4zMiIsIkFOIjoiTWFpbCIsIldUJjoy fQ%3D%3D%7C0%7C%7C%7C&sdata=FnRgP3r6EUha311ecDoSnDW9AHEoi%2FDIXIqZvkBaHSk%3D&reserved=0

PLEASE DO NOT RESPOND TO THIS EMAIL. IT IS SYSTEM GENERATED AND REPLIES ARE NOT MONITORED. If you need assistance please email procurement@usm.edu

Once the email is received, the user will navigate to their worklist to act on the item can follow the link from the email or log into SOARFIN and navigate to the Worklist:

Navigator – Menu – Worklist – Worklist-Summary View (or click the Worklist tile on your SOARFIN homepage)

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	Suppliers				

Locate the item in the Worklist and click "**Mark Worked**" – **\*\*Important**\*\* The user must click the "**Mark Worked**" button to remove it from their worklist or they will not receive future notifications related to the contract.

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Worklist Filters 🗸						
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Date From	Work Item	Worked By Activity	Priority	Link		
12/04/2024	Contract Thresholds	Expiring Contracts / Max \$	~	PC000095, USM01, 1, , 2024-12-20, 000000026, W188388	Mark Worked	
12/19/2024	Contract Thresholds	Expiring Contracts / Max \$	<b>~</b>	PC000110, USM01, 1,, 2024-12-30, 0000060216, W188388	Mark Worked	
11/19/2024	USM Procurement Card Worklist	USM PCard Approvals	~	188388, EQUIP, 112TIOG.JyET79A0113X0B7XqkTDWUeCV, 24692164234104276396103, 1, 2024-08-21, 0, 2024-08-23-11.02.40.680238, DST, 1, ,	Mark Worked	
11/21/2024	USM Procurement Card Worklist	USM PCard Approvals	~	10049502, VISA, wQGMrHLdUgvg0/qiRN3RT9MJVKWLOub, 24116414240718318370140, 49, 2024-08-27, 0, 2024-08-29-10.30.33,149181, DST, 1_,	Mark Worked	
12/03/2024	USM Procurement Card Worklist	USM PCard Approvals	<b>~</b>	188388_VISA. Hkx//dQPOhUBobSq0YyVB9+m6QO1zuhT. 2469216423103239456328_10_2024-08-20_0. 2024-08-22-09.11.45.380106_DST_1	Mark Worked	
	Date From       12/04/2024       12/19/2024       11/19/2024       11/21/2024       12/03/2024	Date From Work Item   12/04/2024 Contract Thresholds   12/19/2024 Contract Thresholds   11/19/2024 USM Procurement Card Worklist   11/21/2024 USM Procurement Card Worklist   12/03/2024 USM Procurement Card Worklist	Work Item   Worked By Activity     12/04/2024   Contract Thresholds   Expiring Contracts / Max \$     12/19/2024   Contract Thresholds   Expiring Contracts / Max \$     11/19/2024   Contract Thresholds   Expiring Contracts / Max \$     11/19/2024   USM Procurement Card   USM PCard Approvals     11/21/2024   USM Procurement Card   USM PCard Approvals     12/03/2024   USM Procurement Card   USM PCard Approvals	Worklist Filters     Date From   Work Item   Worked By Activity   Priority     12/04/2024   Contract Thresholds   Expiring Contracts / Max \$   •     12/19/2024   Contract Thresholds   Expiring Contracts / Max \$   •     11/19/2024   Contract Thresholds   Expiring Contracts / Max \$   •     11/19/2024   USM Procurement Card   USM PCard Approvals   •     11/21/2024   USM Procurement Card   USM PCard Approvals   •     12/03/2024   USM Procurement Card   USM PCard Approvals   •	Worklist Filters     Vorkeit Filters       Date From     Work Item     Worked By Activity     Priority     Link       12/04/2024     Contract Thresholds     Expiring Contracts / Max \$     S     PC000095, USM01.1, 2024-12-20, 000000026, W188388       12/19/2024     Contract Thresholds     Expiring Contracts / Max \$     S     PC000010, USM01.1, 2024-12-20, 000000026, W188388       12/19/2024     Contract Thresholds     Expiring Contracts / Max \$     S     PC000010, USM01.1, 2024-12-20, 000000026, W188388       11/19/2024     USM Procurement Card     USM PCard Approvals     S     PC0000110, USM01.1, 2024-10-20, 000000026, W183388       11/21/2024     USM Procurement Card     USM PCard Approvals     S     PC0000110, USM01.1, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-21, 0, 2024-08-22, 0, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1,	

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Once the user has clicked "**Mark Worked**," they will need to decide what action they wish to take on the contract – let it expire, notify Purchasing to extend the end date, seek new bids/quotes, etc.

You mail email a Buyer directly or send an email to procurement@usm.edu