Submitting Online A19s to the Washington State Department of Commerce

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Introduction

This manual will guide you through the registration and use of the Commerce Contract Management System (CMS) Portal. In order to gain access to system you must first complete a few initial steps:

1. Create a Secure Access Washington (SAW) account
2. Add the Commerce Contract Management System service
3. Submit a CMS Access Request form
4. Log into CMS Portal site using the registration code via SAW.

If you have any questions, contact your Commerce program manager.

You can also use the Table of Contents to navigate through this document.
Step 1 – Create your Secure Access Washington (SAW) account (one-time only)

In order to access Commerce applications, you will need to create a Secure Access Washington (SAW) account. If you already have a SAW account, go to Step 2.

Go to the Secure Access Washington site at https://secureaccess.wa.gov/

Click the “Create One” link to begin
You’ll be taken to a page briefly describing the account creation process. From there, click “Start”.

![SecureAccess Washington Account Creation Process](image-url)
Enter your personal information, including selecting a secret question and answer. The secret question and answer will be used to identify you if your email address changes or you forget your password.
Next, you’ll be asked to create a User ID and Password. Note the requirements for a secure password. You will get a “You have selected a secure password” message when you have met the requirements. Click the Next Button.
Review your information and click the Next button if correct.
You will be sent an email to activate your account.
Go to your email account and click the link provided on your email. The email will be titled → SecureAccess Washington: Welcome to SecureAccess Washington.

Click on the hyperlink in the email. You will be taken to another log in page. This is where you enter your user id and password and access your SAW account for the first time.
Step 2 – Add the Commerce Contract Management System service

Once you’ve logged into SAW, you can add your selected services by clicking on the “Add a New Service” button.
This will take you to a list of state agencies. Click on Department of Commerce to see the list of available Commerce services.

Click Apply for the Commerce Contract Management System. you will also get a User Registered for Service email.
You will get a Service Registration successful message. You will also get an Access Approved email.

Go back to My Secure Services tab and click on the Commerce Contract Management System link to access the system.
Step 3 – Submit a CMS Access Request form

You will also need to send a message to your Commerce program manager letting them know that you would like to access the system. Send them a CMS Access Request form to make sure that they have all of the information necessary to get you added into the system.

The CMS portal has three roles available. Submit, Data Entry and Read Only. Below is a list of activities available by role.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Submit</th>
<th>Data Entry</th>
<th>Read Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Contract Details</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>View A19s</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Print A19s</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Create A19s</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Submit A19s</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Correct and Resubmit A19s</td>
<td></td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>

Access to contracts is granted by SWV number, please complete as many forms as needed to be granted access to all the SWV numbers used for contracts by your organization.
Step 4 – Log into CMS Portal site using the registration code

Once your Commerce program manager registers you as a CMS portal user, you will receive an email like the one pictured below.

If you received an email first, but have not created a SAW account, complete Steps 1 - 3 above.

When you receive this email and have an active SAW account, you can either click on the link in the email to launch the CMS Portal or you can enter the Commerce Contract Management System through your “My Services” in SAW.

If your organization contracts with multiple programs within Commerce, you may have already received an email like the one below. If you have been granted access to all of your Statewide Vendors, you will be automatically granted access to those contracts, provided the program allow online invoices. This means you have already been set up as a person in the Contract Management System. If you need to be granted access to another SWV, submit a completed CMS Access Request form to the applicable Program Manager.
When you receive this email, copy your registration code. You can do this by highlighting the text and holding down the control key while pressing ‘c’.

Then follow the link found in the email to the CMS Portal.

You will be prompted to enter your registration code.

Click in the text box and paste the code. This can be done holding down the control key while pressing ‘v’. Then click on “Finish Registration”.
1. Log into CMS Portal site using the registration code via SAW.

**CMS Portal**

You will be granted access and redirected to the Commerce Contract Management System Home page.

There are four screens on the Portal. Use the Main Menu to navigate to each page.
**Home Screen**

The home page will show invoices associated with your contracts. Your program manager will be able to see the same information within Commerce with the exception of drafts, which are A19s that you have created and saved but not submitted to Commerce.

This screen shows you the A19s you currently have in process. “In process” statuses are:

- Draft
- Submitted
- Program Approved
- Processing Payment

[Learn more about statuses here.](#)
Contracts Screen
This screen will show you all of the contracts that you have been given access to by the Commerce program manager. The “Contracts” and “Create a New A19” menu options will both take you to the Contracts screen.

The Contracts screen shows you all of your contracts that you can use for online A19s and provides a starting point for creating a new A19. To create a new A19, click on the icon with the green plus sign under “New A19”.

You can view your contract by clicking on the magnifying glass to the far left of each contract listing.

Viewing your contract allows you to see contract details as well as any A19s for that contract. You can go to individual A19s by clicking on the view icon by the A19.

If you feel that you are missing any contracts, please contact your Commerce program manager.
Review All A19s Screen
This screen is similar to the Home Screen. The difference is that you have the ability to view not only “in process” A19’s, but also all paid A19s for your contracts.

To view all A19s, check the “Show all” box and then press the “Refresh” button. To go back to an “in process” view, select “Show In process only” and press “Refresh”.

<table>
<thead>
<tr>
<th>View</th>
<th>Invoice #</th>
<th>Contract #</th>
<th>Program</th>
<th>Service Dates</th>
<th>Current Status</th>
<th>Current Status Date</th>
<th>Paid Amt</th>
</tr>
</thead>
<tbody>
<tr>
<td>222076</td>
<td>12-46108-31</td>
<td>Operating and Maintenance Fund</td>
<td>08/01/2013 - 08/31/2013</td>
<td>Program Approved</td>
<td>08-14-2013</td>
<td>$500.00</td>
<td></td>
</tr>
<tr>
<td>222968</td>
<td>12-46108-31</td>
<td>Operating and Maintenance Fund</td>
<td>08/01/2013 - 08/31/2013</td>
<td>Submitted</td>
<td>08-07-2013</td>
<td></td>
<td></td>
</tr>
<tr>
<td>222967</td>
<td>12-46108-31</td>
<td>Consolidated Homeless Grant</td>
<td>08/03/2013 - 08/07/2013</td>
<td>Submitted</td>
<td>08-07-2013</td>
<td></td>
<td></td>
</tr>
<tr>
<td>222957</td>
<td>12-46108-31</td>
<td>Consolidated Homeless Grant</td>
<td>08/01/2013 - 08/07/2013</td>
<td>Submitted</td>
<td>08-06-2013</td>
<td></td>
<td></td>
</tr>
<tr>
<td>222959</td>
<td>12-46108-31</td>
<td>Operating and Maintenance Fund</td>
<td>07/01/2013 - 07/02/2013</td>
<td>Program Approved</td>
<td>08-06-2013</td>
<td>$200.00</td>
<td></td>
</tr>
<tr>
<td>222960</td>
<td>12-46108-31</td>
<td>Operating and Maintenance Fund</td>
<td>07/01/2013 - 07/02/2013</td>
<td>Program Approved</td>
<td>08-06-2013</td>
<td>$200.00</td>
<td></td>
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<tr>
<td>222961</td>
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<td>Operating and Maintenance Fund</td>
<td>07/01/2013 - 07/02/2013</td>
<td>Program Approved</td>
<td>08-06-2013</td>
<td>$200.00</td>
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<tr>
<td>14215</td>
<td>12-46200-144</td>
<td>Operating and Maintenance Fund</td>
<td>03/01/2012 - 03/31/2012</td>
<td>Processing Payment</td>
<td>04-17-2012</td>
<td>$0.00</td>
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<tr>
<td>5433</td>
<td>12-46108-31</td>
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<td>02/01/2012 - 02/29/2012</td>
<td>Processing Payment</td>
<td>03-18-2012</td>
<td>$2,857.62</td>
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<td>5158</td>
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<td>03-12-2012</td>
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<td></td>
</tr>
<tr>
<td>4707</td>
<td>12-46200-144</td>
<td>Operating and Maintenance Fund</td>
<td>03/21/2012 - 02/21/2012</td>
<td>Processing Payment</td>
<td>02-27-2012</td>
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<tr>
<td>4181</td>
<td>12-46108-31</td>
<td>Operating and Maintenance Fund</td>
<td>01/01/2012 - 01/31/2012</td>
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<td>02-14-2012</td>
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<tr>
<td>3696</td>
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<td>Operating and Maintenance Fund</td>
<td>01/01/2012 - 01/17/2012</td>
<td>Processing Payment</td>
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<tr>
<td>2215</td>
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<td>Operating and Maintenance Fund</td>
<td>12/12/2011 - 12/12/2011</td>
<td>Processing Payment</td>
<td>12-14-2011</td>
<td>$3,750.00</td>
<td></td>
</tr>
</tbody>
</table>
Create New A19 Screen
This screen shows you all of your contracts. As previously mentioned, the Contracts and Create New A19 menu options both take you to the Contracts list view.

From this screen you have the ability to start a new A19.

How to Create a New A19
You can create a new A19 from either the Contracts screen or the Create New A19 screen. From either of these screens, select an executed contract and click on the icon with the green plus sign.

This will take you to a new invoice screen. Some of the fields will be auto-populated for you. You will see the project name, the corresponding Commerce program and contract number based on the contract you selected to create an invoice/A19 for.

You will also see your contract budget categories and activities, if applicable.
A19 Detail Screen
This will take you to a new invoice screen. Some of the fields will be filled in for you to assist you in verifying that you have selected the correct contract. Your Commerce program manager information is also displayed if you have any questions or need assistance.

The fields that you have the ability to fill in on your A19 are displayed in white. The rest of the screen is gray. The fields available for entry are:

- **Account #** -- This is where you can track your account number, if applicable.
- **From Date** -- This is the start date for the service period.
- **Thru Date** -- This is the end date for the service period.
- **Vendor Notes to Commerce** -- Enter notes here that will be visible to Commerce.
- **Attach** -- This is where you can add an attachment that can be seen by Commerce. In order to add an attachment, you must first save your new A19 so that an invoice number is generated.
- **Contract Budget** -- This is where you enter the amounts they are requesting on your A19. If your program manager has set up budgets categories and/or activities then you have the ability to request amounts by line item.
- Certification Checkbox -- In order to submit an A19 to Commerce you will be required to check the certification box to verify that they have the authority to submit the invoice. This removes the need for a signature. You will need to re-certify by clicking the checkbox each time you re-submit your A19.

When you are on the new A19 screen, enter your A19 information, including requested amounts, then save the A19.

This will save the A19 in draft form. The A19 is not yet visible to Commerce staff. It will, however, now be included in your list of in-process A19s. If you need to exit the system, you will be able to return to your A19 to complete and submit it. Re-open the draft A19 you just created by clicking on the edit icon to the left of the row.

Once you are ready to submit your A19 to Commerce, check the certification box, stating that you are authorized to submit the A19 and click on “Save and Submit”. This will send your A19 to Commerce’s Contract Management System, where your program manager will review and process it.
If you are missing any required fields, you will see a warning letting you know what you need to fill in.

**A19 Details For: Invoice**

**Service dates are required.**

From within the A19, you also have the ability to delete the A19 using the “Delete” button. This option is only available for Draft A19s. If there is a need to delete a submitted A19, contact your Program Manager and they will reject the A19 for you.

The “Cancel” button takes you out of the A19 and sends you back to your home screen.

**How to Add an Attachment**

After you save your A19, you will have the ability to add an attachment. Any attachments you add will be visible to your Commerce program manager once the A19 is submitted. To add an attachment, select “Browse” and navigate to your document and then select “Attach”.

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 Hanna Beinlich 2016
“Browse” will give you access to the documents on your computer or within your network depending on where you are working from. It’s the same as adding an attachment to an email.

Once you navigate to the document you’d like to upload, click on “Open” (above). You will see the name of your attachment on the screen, but in order to finish attaching, you will need to click “Attach”.

You will not be able to add an attachment until after you have saved the initial draft of your A19. The “Attach” button will be grayed out until you save your A19.

You will not be able make changes to your attachment from within the CMS Portal. If you need to update or change an attachment, you will need to delete the old attachment and upload the corrected version. Once an attachment has been submitted to Commerce, you will not be able to delete it.
How to Print an A19

To print a copy of your A19, select the “Print A19” button.

This will give you a PDF version of the A19 you created. There is no requirement to send this to Commerce. This copy is for your own records.
How to Correct an A19

After you’ve saved an A19, you can get back to it from either the home screen or by going to “Review All A19s”. To correct the A19, select the edit icon to the left of your chosen A19.

This option is available to you when your A19 is in draft or submitted status. Once your A19 has been approved by Commerce it will be locked down to you. If your A19 has moved to approved status, you will need to contact your Commerce program manager if you’d like to make any changes.

Once your A19 is unlocked by your Commerce program manager, correct your data and then click “Save and Submit”.

You will not be able to simple hit “Save”. It will be grayed out. Make sure you recertify your A19 or you will not be able to submit it to Commerce.

Once you press “Save and Submit” you will see a message at the top of your screen. You will see that you have at least one A19 already with a similar date range. Take a look at your date range, verify that it’s correct and then click continue.

This submits your updated A19 to Commerce.
How to Find Your Commerce Program Manager

Your Commerce program manager is listed on your A19, along with their phone number and email address.

You can also find their name on your contract list.

How to Logout of the System

When you are done using the CMS Portal, you can logout of the portal by clicking on Logout. This will allow other to login if you are using a share machine.
How to Access CMS Portal Help
The blue question mark in the upper right corner of the CMS Portal is a link to user manuals, help documents and other useful information on the Commerce website. If you don’t find what you need here, then contact your Commerce program manager.

A19 Statuses
Your A19 will move through several different statuses. You’ll see the status on your list of A19s.

Here are the statuses you will see and the actions that lead to them.

<table>
<thead>
<tr>
<th>User Action</th>
<th>A19 - Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>You enter basic A19 information online and click save. The A19 has not been seen by Commerce.</td>
<td>Draft</td>
</tr>
<tr>
<td>You click the submit button. Your A19 can now be seen by Commerce.</td>
<td>Submitted</td>
</tr>
<tr>
<td>Commerce approves your A19.</td>
<td>Program Approved</td>
</tr>
<tr>
<td>Commerce fiscal services has received your approved A19.</td>
<td>Processing Payment</td>
</tr>
<tr>
<td>Your A19 has left Commerce. You have either already been paid or will be paid shortly.</td>
<td>Paid</td>
</tr>
<tr>
<td>Commerce rejects your A19. You will need to talk to your program manager to determine next steps.</td>
<td>Rejected</td>
</tr>
</tbody>
</table>
System Access Request Form

Mail or email this completed form to your Commerce program manager. The Contract Management System Portal (CMS) is accessed through Secure Access Washington (SAW). Use this link to access the SAW site [https://secureaccess.wa.gov/](https://secureaccess.wa.gov/) and create a SAW account.

Upon receipt of this form, your Commerce program manager will send a CMS Registration Code to your SAW email address. See the CMS training manual on the website for instructions on how to create a SAW account and to login to CMS.

Requestor Information

<table>
<thead>
<tr>
<th>FIRST NAME</th>
<th>LAST NAME</th>
<th>WORK PHONE</th>
<th>CELL PHONE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SAW EMAIL</th>
<th>FAX PHONE</th>
<th>ROLE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>☐ Data Entry and Submit</td>
</tr>
<tr>
<td></td>
<td></td>
<td>☐ Data Entry Only</td>
</tr>
<tr>
<td></td>
<td></td>
<td>☐ Read Only</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ORGANIZATION NAME</th>
<th>STATEWIDE VENDOR NUMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ORGANIZATION NAME</th>
<th>STATEWIDE VENDOR NUMBER</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>

Requestor Agreement

By signing this form, I certify that I am authorized to view and/or submit information on behalf of the organizations listed above, will practice adequate Password management by keeping Passwords confidential and agree to the Conditions of Use Access Agreement.

[http://www.commerce.wa.gov/privacy-information/conditions-use-access-agreement/](http://www.commerce.wa.gov/privacy-information/conditions-use-access-agreement/)

<table>
<thead>
<tr>
<th>PRINTED NAME</th>
<th>SIGNATURE</th>
<th>DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Manager Approval

By signing this form, I approve this employee to access the CMS portal on behalf of the organizations listed above.

<table>
<thead>
<tr>
<th>PRINTED NAME</th>
<th>SIGNATURE</th>
<th>DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>