



Supplemental Agreement Training Guide

Date Created: 7/14/2021

Date Updated: 9/24/2021

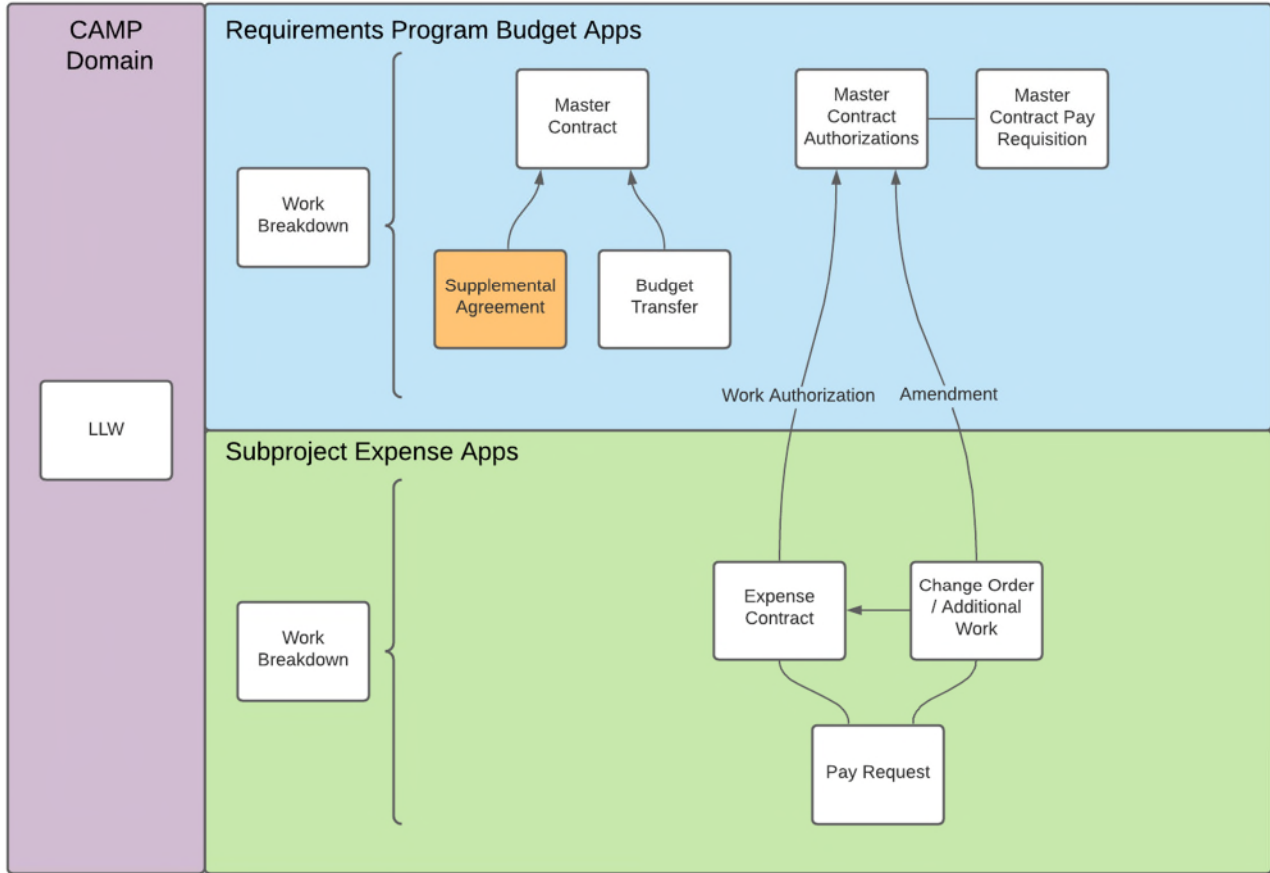
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About

Supplemental Agreements increase or decrease the contract value.

Workflow Diagram



Process Overview

The CM Ops Manager enters the new or updated cost items in Supplemental Agreement based on what Finance entered in Oracle Financials.

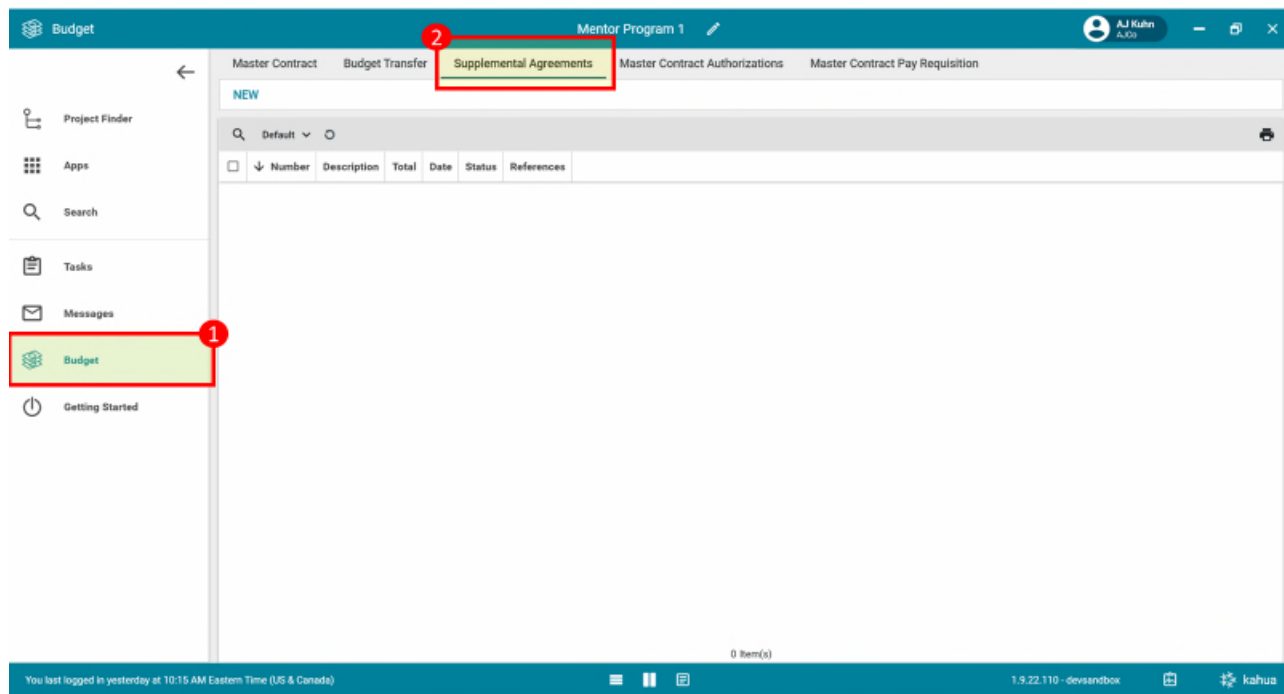
Step-by-Step Instructions

Create Supplemental Agreement

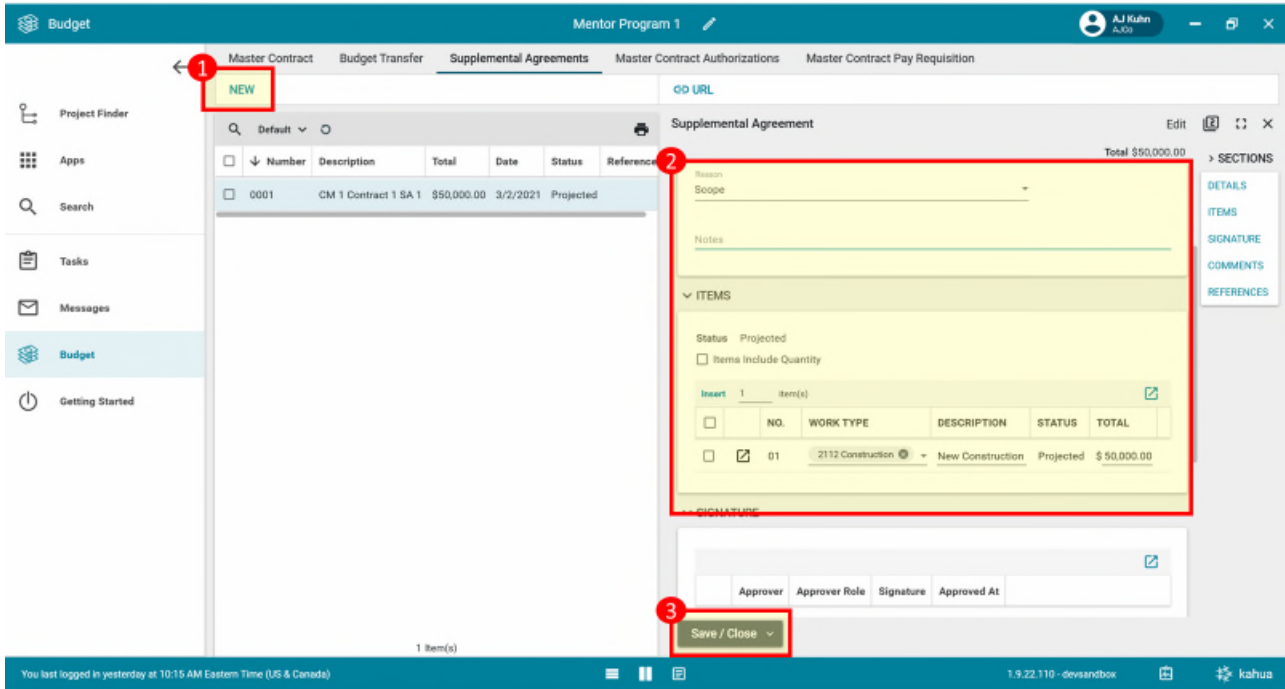
Role	Preceding Steps	Outcome
Operations Manager	Budget entered in Oracle Financials. Need to increase or decrease Master Contract value. Supplemental Agreement information to enter into CAMP.	Supplemental Agreement is created.

Steps

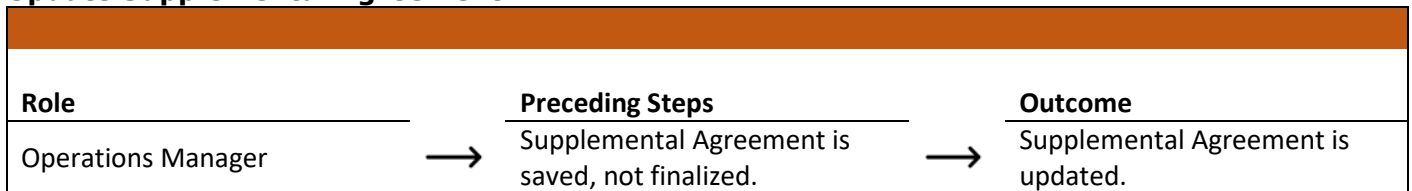
1. Go to 'Project Finder' > Navigate to the appropriate Mentor Program > Go to 'Apps' > Select 'Budget' App > Select the 'Supplemental Agreements' tab



2. Click 'New' > Enter Required Fields > Click 'Save/Close'

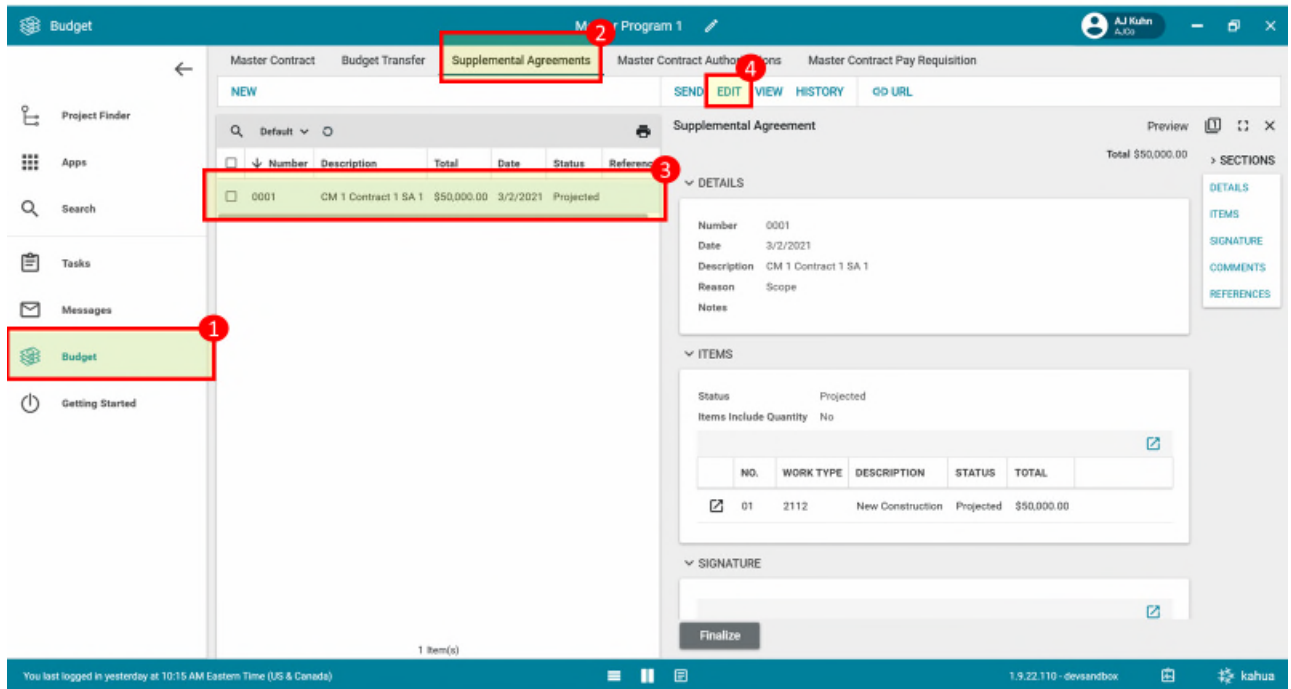


Update Supplemental Agreement

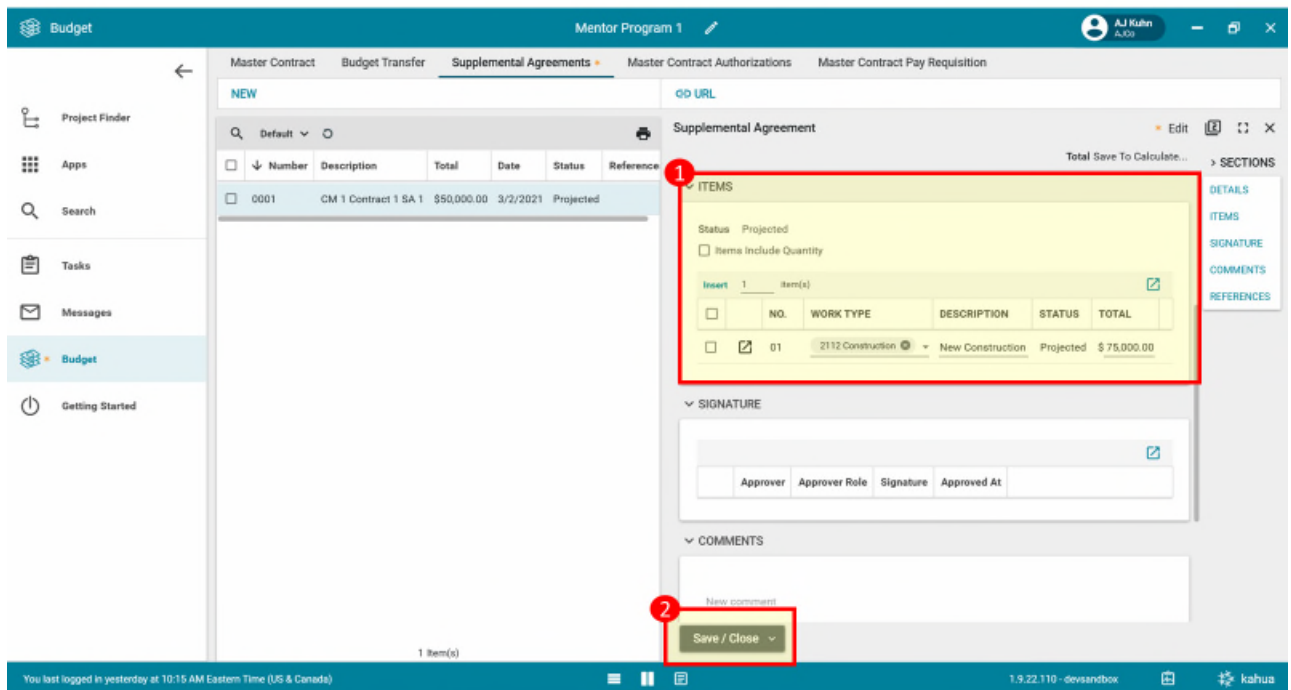


Steps

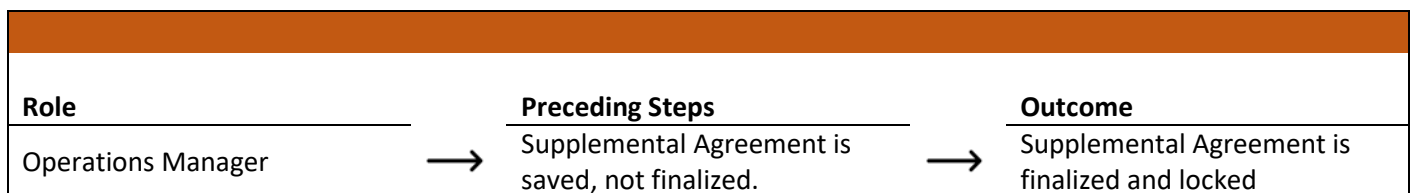
1. Go to 'Apps' > Select 'Budget' App > Select the 'Supplemental Agreements' tab > Click on Supplemental Agreement > Click 'Edit'



2. Update Fields > Click 'Save/Close'

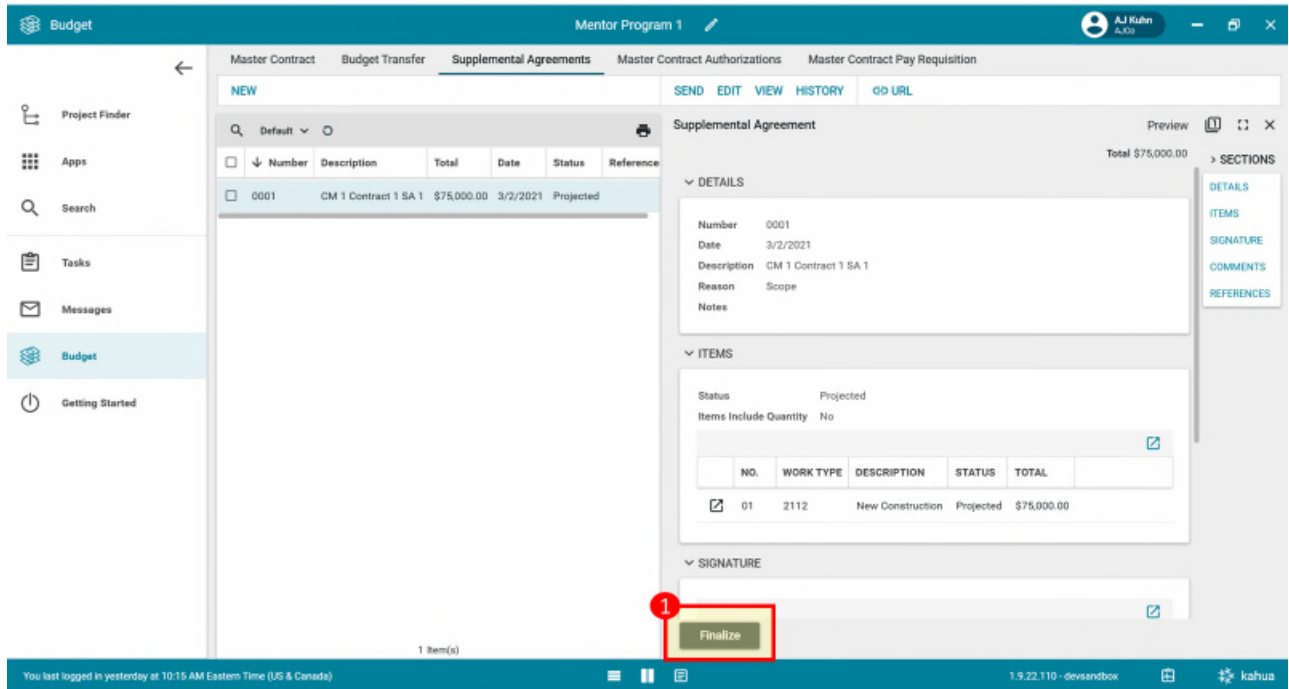


Finalize Supplemental Agreement



Step

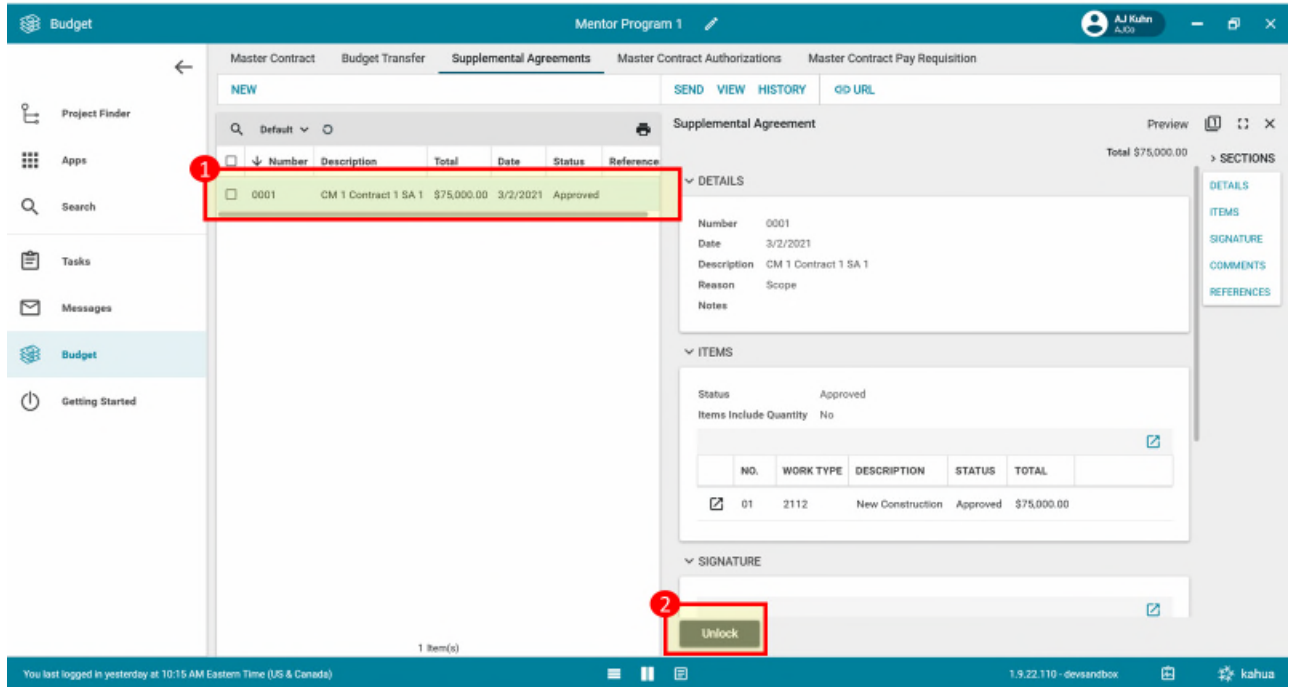
Go to 'Apps' > Select 'Budget' App > Select the 'Supplemental Agreements' tab > Click on Supplemental Agreement > Click 'Finalize'



Unlock Supplemental Agreement

Role	Preceding Steps	Outcome
Operations Manager	→ Record is finalized (locked).	→ 1. Record is unlocked. 2. CM Facilitator / Ops Manager can update record, including Items table cost lines.

1. Go to 'Apps' > Select Budget App > Select Supplemental Agreement > Click on record requiring an update > Click 'Unlock'



Update and Lock Supplemental Agreement

Role	Preceding Steps	Outcome
Operations Manager	→ Record is unlocked. Updates completed, no cost lines adjustment.	→ 1. Record is finalized and locked, including cost items. 2. Only SCA CM Facilitators, Ops Managers and Administrators can unlock.

Step

Go to unlocked record > Click 'Edit' > Update fields, (do not modify Items table) > Click 'Lock'

Budget Mentor Program 1 A.J. Kuhn A.00

Master Contract Budget Transfer Supplemental Agreements Master Contract Authorizations Master Contract Pay Requisition

NEW SEND EDIT VIEW HISTORY URL

Supplemental Agreement Preview Total \$75,000.00

Number	Description	Total	Date	Status	Reference
0001	CM 1 Contract 1 SA 1	\$75,000.00	3/2/2021	Approved	

DETAILS

Number 0001
Date 3/2/2021
Description CM 1 Contract 1 SA 1
Reason Scope
Notes

ITEMS

Status Approved
Items Include Quantity No

NO.	WORK TYPE	DESCRIPTION	STATUS	TOTAL
01	2112	New Construction	Approved	\$75,000.00

SIGNATURE

Lock Restart Void

1 Item(s)

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