

Contract Amendment Process in Trust Central

Providers should follow the steps below to initiate an amendment in Trust Central:

1. **Before you begin** the amendment process please ensure you have discussed the need for the amendment with your Contract Manager in order to decide what areas of the contract should be amended.
2. **Select Program** from listing to work with and choose the appropriate “executed” contract to amend.

Contracts Home / Contracts / Contracts

RECORDS ▾ My Queue WF Setup Options

+ Add Filter Save Reset Settings Download Merge Single ▾

Drag a column here to group by that column

	Allocation	Budget Contract Amo...	Agency Signer (Gener...	Agency	Program	Fiscal Year	Contracting Status	Type ↑	Budget Sta
55	\$769601.00	\$339,601.00	48521	Urgent	YEN XX16-1360 Urg...	17-18 (8/01/17 - 7/3...	Executed	Contract	Approved
56	\$141172.00		46305	Belafonte Tacoloy	YAS XX14-4070 Belaf...	17-18 (8/01/17 - 7/3...	Initial Trust Review	Contract	
57	\$720629.00		47244	New Jerusalem	YAS XX14-2080 New...	17-18 (8/01/17 - 7/3...	Initial Trust Review	Contract	
58	\$381024.00	\$381,024.00	45732	Branches, Inc.	YAS XX14-1520 Bran...	17-18 (8/01/17 - 7/3...	Initial Trust Review	Contract	Edit

3. **Select workflow** button to place yourself in workflow as the appropriate staffer, select save (Note: this action will reroute the program to your queue once created by the appropriate staff).

RECORDS ▾ My Queue WF Setup Options

YEN XX16-1360 URGENT

WF Audit Trail **WF Setup** Scope Create Amendment

Executed
 Approved
 YES
 YES
 \$769,601.00
 17-18 (8/01/17 - 7/31/18)
 7

Contract	Budget	Agency Signed	CSC Signed	Allocation	FY	Positions

CONTRACT NO. BETWEEN THE CHILDREN'S TRUST

SECTION

1. Agency: Editors

These users can add, delete, and modify information. When all sections are marked complete, these users will have the option to APPROVE. Once all of these users have approved, the document will move to the Reviewer's queue. Users with "Review Only" selected will not have the option to APPROVE, but they will receive an email when the document arrives and have the document in their queue while it is at this level.

User	Reviewer Only	
Patricia LealA	<input type="checkbox"/> Yes	Delete

Add More

2. Agency: Reviewers

These users can review the document and decide whether to APPROVE it or REJECT it. Once all of these users have approved, the document will move to the Submitter's queue. Users with "Review Only" selected will not have the option to APPROVE or REJECT, but they will receive an email when the document arrives and have the document in their queue while it is at this level.

User	Reviewer Only	

Add More

3. Agency: Submit to CSC

These users can review the document and decide whether to APPROVE it or REJECT it. Once all of these users have approved and the budget has been approved, the document will be submitted to The Children's Trust. Users with "Review Only" selected will not have the option to APPROVE or REJECT, but they will receive an email when the document arrives and have the document in their queue while it is at this level.

User	Reviewer Only	
Patricia LealA	<input type="checkbox"/> Yes	Delete

Add More

Save

4. Select Create Amendment button within program/contract selected to create amendment.

WF Audit Trail | WF Setup | Scope | **Contract**

● Approved ● Yes ● YES ● NO

Amendment Change Budget Agency Signed CSC Signed

General
Agency Signer
Program Description
Increase the number of participants from 50 to 60 to answer to the community need of increasing YF services in the South

SECTION
100%
✓ General

WF Audit Trail | WF Setup | Scope | **Create Amendment**

● Executed ● Approved ● YES ● YES ● \$769,601.00 ● 17-18 (8/01/17 - 7/31/18) ● 7

Contract Budget Agency Signed CSC Signed Allocation FY Positions

CONTRACT NO.
BETWEEN THE CHILDREN'S TRUST

SECTION

- Reason for amendment** options menu will appear (*Note: Please be specific with the narrative included as this language will display later in the summary of the legal document*). User **selects Sections to amend** and inputs **Reasons for change** in the open text box. Once complete, **select Create Amendment** button.

Reason for Amendment

Reason for Amendment

* Sections

- General
- Participants
- Sites
- Activities
- Staffing
- Staffing Non-Salaried
- Participant Outcomes

Reason

Original contracted services are amended to increase youth enrichment services in the area of Miami Gardens to respond to a higher need of this type of services in the target area. This services expansion will impact original contracted services in the program description, number of participants, number of site locations, number of direct services staff and the budget sections of the contractual document.

Create Amendment

Note:

For all Resolution changes (i.e Fiscal year/ contract amount changes/ any sub-contractor change) legal name changes, or the changes within the General Section, the General Section option should be checked and completed when selecting a reason for the Amendment

- From your queue choose the contract for amending and **select Modify**

Contracts

Home / Contracts /

RECORDS ▾ My Queue 2 WF Setup Options

YEN XX16-1360 URGENT

Modify WF Audit Trail WF Setup Scope Modify Sections Contract

Not Started Yes NO NO

Amendment Change Budget Agency Signed CSC Signed

General

Agency Signer

Program Description

Contract Timeframe

Grade Level

SECTION

0%

✗	General
✗	Participants
✗	Sites

Contracts Home / Contracts / Contracts

RECORDS ▾ **MY QUEUE 2** WF Setup Options

+ Add Filter Save Settings Download Merge Single ▾

drag a column here to group by that column

	Allocation	Budget Contract Amo...	Agency Signer (Gener...	Agency	Program	Fiscal Year	Contracting Status	Type	Budget Statu
* 1	\$769601.00	\$339,601.00	48521	Urgent	YEN XX16-1360 Urg...	17-18 (8/01/17 - 7/3...	Not Started	Amendment	Approved

Contracts Home / Contracts / Contr

CORDS ▾ My Queue 2 WF Setup Options

YEN XX16-1360 URGENT

Modify WF Audit Trail WF Setup Scope Modify Sections Contract

Not Started
 Yes
 NO
 NO

Amendment Change Budget Agency Signed CSC Signed

General

Agency Signer

Program Description

Contract Timeframe

Grade Level

SECTION

0%

✗	General
✗	Participants
✗	Sites

*Note: On the right-hand side of the screen the editor and reviewer(s) can see the Amendment section status. Additionally, in the same side of the screen, there is a summary of the Amendment changes by section.

General

* Select the agency signer from the dropdown list
 * Type in your program description and the enrollment criteria and process. In most cases, copying and pasting the from your current contract should suffice.
 * The remaining fields should be completed based on the information in your current contract.

* Agency Signer: Patricia LealA

* Program Description: Urgent, Inc.'s Film Arts & Culture Coding Entrepreneurship (FACE) program is a year round youth employment, work preparedness and leadership enrichment program designed to fuel the Creative Design, Tourism & Hospitality and Information Technology growth

* Contract Timeframe: School-Year Summer

* Grade Level: Middle School (6-8 grade) High School (9-12 grade)

* Primary Component: Youth Employment

* Additional Component(s): Arts Service Learning

SECTIONS

25%

✳	General
✗	Participants
✗	Sites
✗	Staffing

AMENDMENT CHANGES

Change FY:	No
Change Name:	No
Change Subcontractor:	No
Change Budget:	Yes

- Update changes, validate all entries (by selecting each entry and clicking save entry) and mark the section as complete. **Select save and move to the next Amendment section.**

Participants

* Add participants for each timeframe. For example, if school-year and summer services, there will be two entries in this section
 * Enter number of participant, percent CWD, total number of weeks, and overall number of sessions from your current contract

* Timeframe: School-Year

* Participant Type: Youth_Children

* Number of Participants: 520

* Percent CWD: 5 %

* Total Number of Weeks: 28

* Overall Number of Sessions: 560

Buttons: Save Entry, Cancel, Delete Entry

SECTIONS

25% progress bar

- General
- Participants
- Sites
- Staffing

AMENDMENT CHANGES

Change FY: No

Change Name: No

Change Subcontractor: No

Change Budget: Yes

Participants (2)

* Add participants for each timeframe. For example, if school-year and summer services, there will be two entries in this section
 * Enter number of participant, percent CWD, total number of weeks, and overall number of sessions from your current contract

New Entry

ID	Timeframe	Participant Type	Modified	Modified By
3168	School-Year	Youth_Children	11/17/2017	Patricia LealA
3169	Summer	Youth_Children	11/17/2017	Patricia LealA

Mark this Section Completed

Buttons: Back, Next

SECTIONS

25% progress bar

- General
- Participants
- Sites
- Staffing

AMENDMENT CHANGES

Change FY: No

Change Name: No

Change Subcontractor: No

Change Budget: Yes

- Select/verify Agency signer located in the General Section.

RECORDS My Queue 2 WF Setup Options

General

* Select the agency signer from the dropdown list
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 * The remaining fields should be completed based on the information in your current contract.

* Agency Signer: Patricia LealA

* Program Description: Urgent, Inc.'s Film Arts & Culture Coding Entrepreneurship (FACE) program is a year round youth employment, work preparedness and leadership enrichment program designed to fuel the Creative Design, Tourism & Hospitality and Information Technology growth

SECTIONS

25% progress bar

- General
- Participants
- Sites
- Staffing

9. **Review summary page** ensuring the reason for the change is captured for all changes (Note: language in *text display will appear in formal amendment document*). **Review current contract versus amendment** tabs to ensure all changes are captured correctly.

Participants

Contract Amendment

Timeframe	Participant Type	Number of Participants	Percent CWD	Total Number of Weeks
School-Year	Youth_Children	500	5.000000000000000e+000	28
Summer	Youth_Children	300	3.000000000000000e+000	7

* Reason for Change: Number of participants are increased from 50 to 60 youth in the area of Miami Gardens

Sites

10. Select Finish.

Staffing

Contract Amendment

Timeframe	Position Title	Position Category	Full-time/Part-time/Seasonal	Number of Staff
School-Year,Summer	Program Coordinator- FACE	Program Management	F	1.000000000000000e+000
School-Year,Summer	Project Director/ Vice President	CEO/Executive Director	F	1.000000000000000e+000

* Reason for Change: Additional Direct Services Positions were added to maintain the proper staff/child ratios

Finish

11. Click **green approve button** which will advance the amendment in the process for approval.

Modify **Approve** WF Audit Trail WF Setup Scope Modify Sections Contract

In Progress Yes NO NO

Amendment Change Budget Agency Signed CSC Signed

General

Agency Signer
Contract is signed by the new CEO

Program Description
Number of Participants increased from 50 to 60 due to increase of services in the Miami Gardens area

SECTION

100% 

General

12. This will forward the amendment to the next person the agency has placed in the workflow until it reaches the submitter. Once the submitter approves the amendment, it will be forwarded to the Contract Manager at The Trust/or their designee.

