Graduate Contract Amendments

This guide offers instructions on how to amend a contract within workflow using the OnBase Unity Client. Additionally, this documentation offers steps on how to resubmit a contract into the workflow, and communicate contract updates to the student and/or department, or cancel a contract.

Note: All contract submitters are responsible for knowing Graduate Contract policies. For information on these policies, visit the Graduate Assistantship website (https://www.mines.edu/graduate-studies/graduate-assistantship/). For a high-level overview of the entire graduate contract process, see the Graduate Contracts Process Flow PDF.

How to Amend or Cancel a Graduate Contract

Perform the following steps to locate a contract, and use workflow to amend and re-submit a contract for review, using the OnBase Unity Client.

1. Before amending a contract, you will need to locate it using either Document Retrieval or Custom Query. For instructions on how to locate a contract, see the "Graduate Contract – Document Retrieval, Custom Query and PDF Packet Creation" documentation.
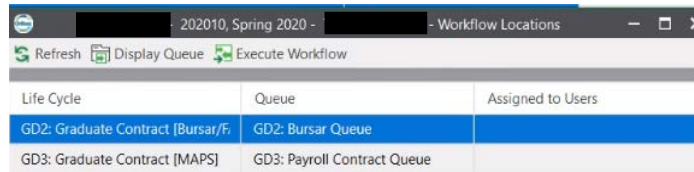
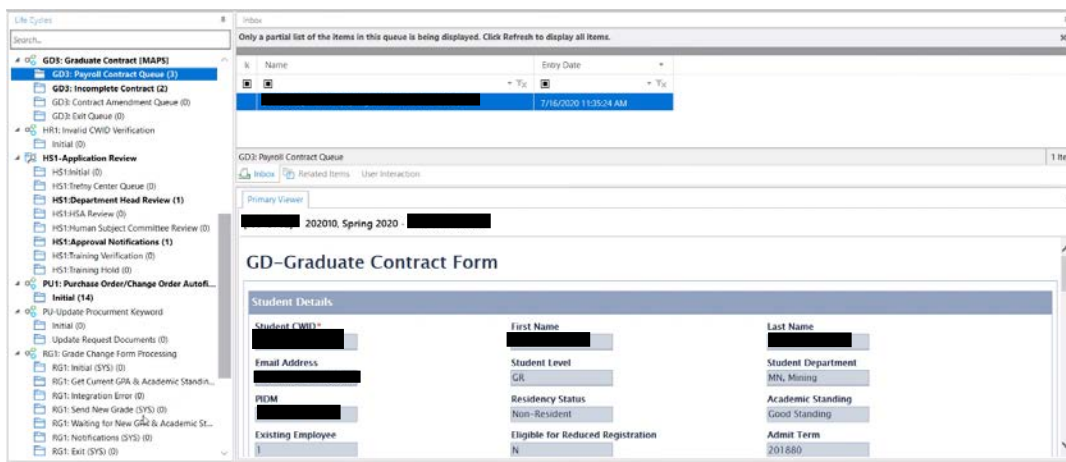   Upon locating the contract, right-click the contract and select **Workflow** and **Workflow Queues**.
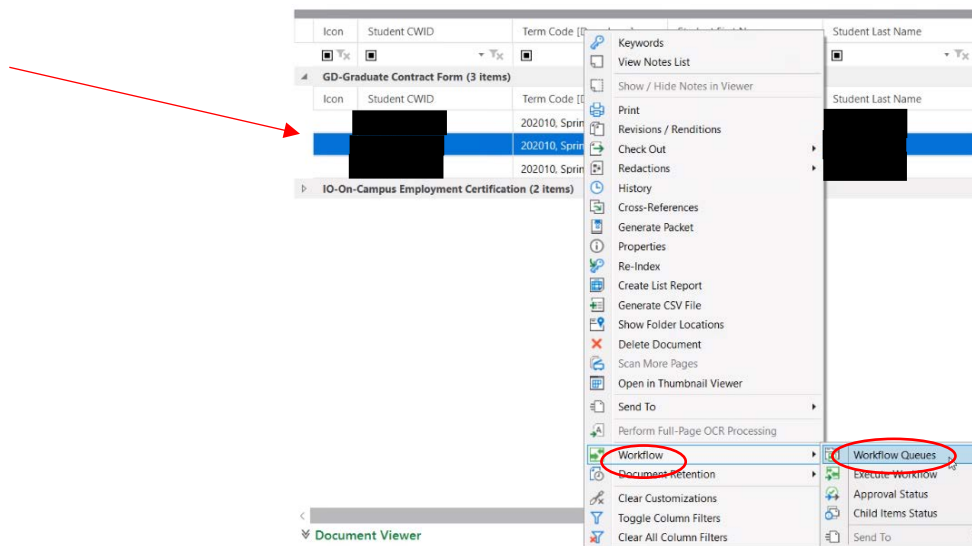
A popup window will appear:

    a. If a contract is in workflow, the popup window will display the Workflow(s) and Workflow Queue(s) that the contract exists in.
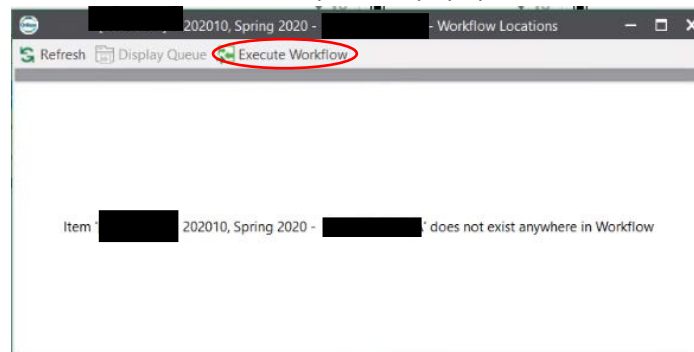

        Double-click on the desired Workflow Queue and OnBase will automatically route you to the contract within the selected workflow queue.
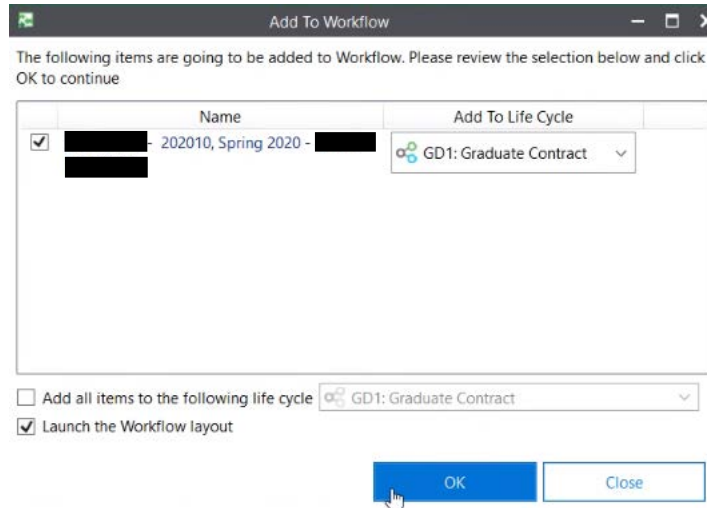

    b. If a contract is not in workflow, the popup window will display the following message. Click on the **Execute Workflow** tab at the top of the popup window.

A new popup window will appear. Select "**Launch the Workflow Layout**" at the bottom left-hand side of the popup and click **OK**.

OnBase will automatically route you to the contract within the selected workflow queue.

2. Click on the contract and select the **Route to Contract Amendment Queue** user action from the toolbar at the top right of the screen.

Route to Contract
Amendment Queue

This action will move the contract into the Contract Amendment Queue (specific to the workflow you are working in: GD1, GD2, or GD3) where you can make changes.

3. Navigate to the **Contract Amendment Queue** and search for the contract by *Student CWID/Name* in the search bar.
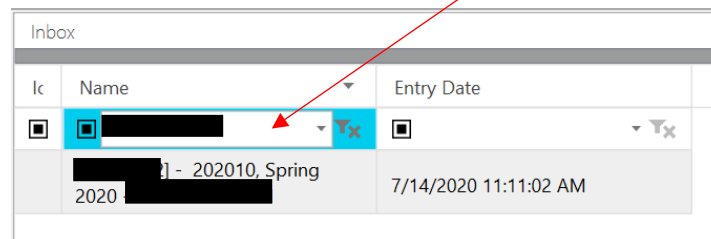
4. Select the contract to view it in the *Primary Viewer* and proceed with making any necessary changes to the contract. Log any changes made to the contract in the **Amendment Details** section on the form, including *date of change, contract type(s) and details of the change*.
   a. For cancellations: Only update the Amendment Details section with the date, contract type(s) and details of the cancellation (i.e. last pay period, etc.). *Note: Do not make changes to any contract details when cancelling a contract.*

Amendment Details:
Example: Date|Contract Type|Details of change

Note: It is important that you log any changes made to the contract as departments will depend on this information to identify new vs amended contracts and any modifications needed in Banner.

5. Click the **Save / Submit** button at the bottom of the contract to save changes.

Save / Submit

6. Select one of the user actions from the toolbar at the top right of the screen:

Re-Submit Contract   Cancel the Contract   Send Update to the Student

a. **Re-Submit Contract**: This action will remove the contract from the Contract Amendment Queue and re-route the contract to the necessary departments for review. A contract will be re-routed differently depending on the workflow you are working in:
   i. **Contracts re-submitted in the GD1: Graduate Contract workflow** will be routed to the beginning of the GD1: Graduate Contract workflow and sent to OGS, ISSS, and/or the student accordingly.
   ii. **Contracts re-submitted in either the GD2: Graduate Contract [Bursar/FA] workflow** or **the GD3: Graduate Contract [MAPS] workflow** will be routed to the end of the GD1: Graduate Contract workflow (Exit Queue) and sent to MAPS, FA, and/or the Bursar's Office accordingly.

b. **Cancel the Contract:** This action will initiate cancellation email notifications to the student and supervisor(s), as well as a separate notification to campus departments (including OGS, ISSS, MAPS, FA, and Bursar) regarding the cancellation.

   For the student/supervisor(s) notification: You will be required to enter a reason for the cancellation that will display as part of the email notification.

User Interaction

Discard and Continue   Discard and Cancel

Reason Form

Describe the changes to the contract:

Student/Supervisor(s) Cancellation Email Notification (reason circled in red)

Subject: Contract Cancelled for ███████████

Dear ██████████

The graduate contract for ████████ hi has been cancelled for the reason below. You may contact ███████████ at ███████████████ with any questions.

test

Thank you,

████████████

For the department notification: Upon selecting the "Cancel the Contract" user action, OnBase will generate a PDF Packet of the contract and send an email notification to departments (OGS, ISSS, MAPS, FA and Bursar). The notification will include the form submitter contact information as well as a link to the contract and attached PDF Packet.
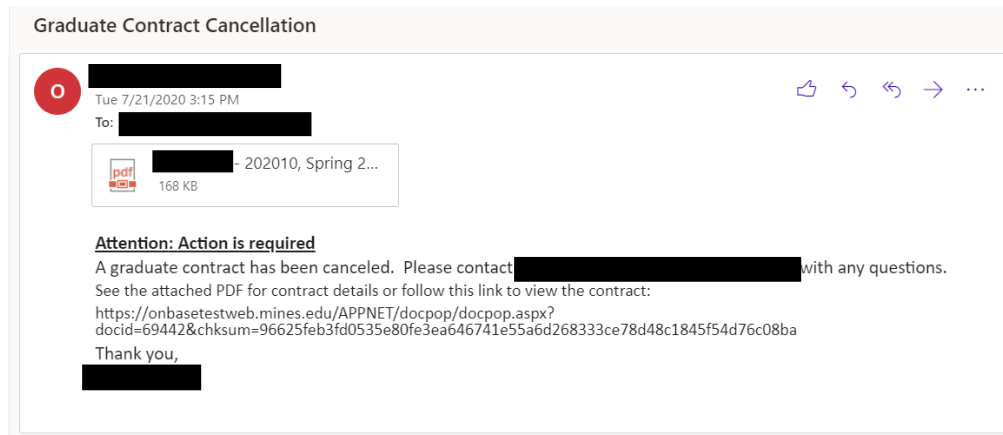
c. **Send Update to the Student**: This action gives you the option of sending the student a notification to communicate any changes that have been made to the contract after they have already authorized it. You will be required to enter a message that will display as part of the email notification.

Update Email Notification (message circled in red)

Subject: Update to your Graduate Contract

Dear █████████████

No action is required from you at this time.

A change to your graduate contract has been submitted. If any issues arise, you will be notified. Please contact ████████ ████████ at ███████████████ with any questions.

testing update notification

Follow this link to view the contract:

https://onbasetestweb.mines.edu/APPNET/docpop/docpop.aspx?
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Thank you,

Note: Selecting this action will not remove the contract from the Contract Amendment Queue and you will need to select the Re-Submit to Workflow user action to move the contract along for processing.