Agreements Overview & Online Execution Setup

Student Success
Staff Support
Site Safety
Smart Statistics

Overview

Benefits of Using S4 to store/execute agreements

- Ability to easily report on agreements by expiration date (and even notify sites)
- One location for all of your agreements

Preparing to Implement

- Have a clear process outlined (e.g. who needs to sign, what happens if changes are requested)
- Have a designated person familiar with S4 who can help work out kinks in the beginning
- Be open to changes in the process that might be different compared to old paper process

Choosing an Implementation Option

- Online execution **(recommended)**
    - **Pros**
        - Mostly automated process (“set it and forget it”) ⟶ fewer errors/faster
        - Can be executed anywhere with internet access
        - Extra security by retaining an IP address of submitter
        - Customizable email notifications at each step
        - Integrates easily with the Request to Initiate Partnership process
    - **Cons**
        - May be daunting in initial setup and process clarification
- Manually Upload PDFs
    - **Pros**
        - Can be handled by a student assistant
    - **Cons**
        - Manual, requires consistent human interaction ⟶ higher probability of error/slower
        - Time consuming process for all parties, especially if they cannot digitally sign the PDF
        - Can’t be easily integrated into the Request to Initiate Partnership process

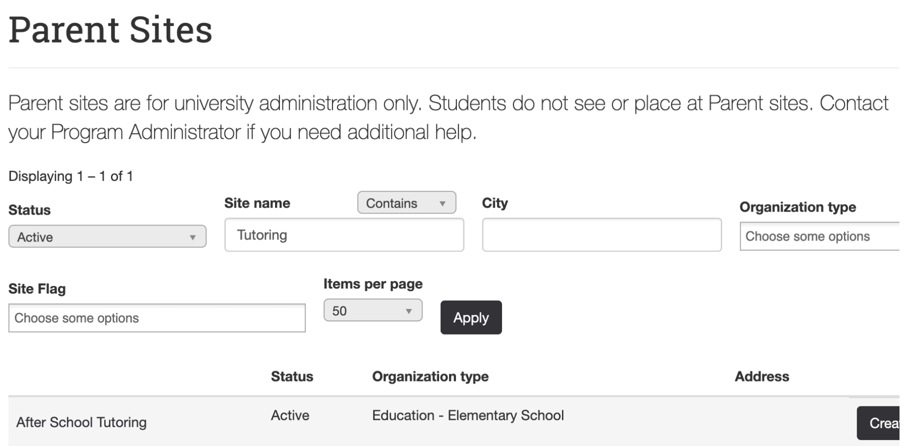
S4 Implementation Options

Manually upload PDFs (deprecated)

Note: *This is a very short process that assumes you already have a PDF file of the contract and that a Parent Site exists for the agency.*

1. From your dashboard, click the **View a list of Parent Sites** button in the upper right

2. On the list of Parent Sites find the site whose contract you want to upload using the provided filters, and click on the site name



3. On the Parent Site's main page click the **Log Entries** tab
   (Screenshot will be added shortly)
4. On this page click the **Add Log Entry** button in the upper right
5. Fill out the form with the appropriate information, including uploading your PDF in the **Upload File** field. Also make sure to provide a descriptive title and fill out the **Expiration Date**!
   ***Note**: Log Entry Category should always be marked as **Contract** so reporting works correctly*
   (Screenshot will be added shortly)

Online execution process

***Note:** This process assumes you have created a **Contract** Form and that a Parent Site exists for the entity executing the contract.*

IMPORTANT: In order for the automatic Log Entry to be created, the Contract form must have a **Site NID** field with the following settings:

- Type — Number
- Default value — [current-page:query:nid]
- Validation — Integer, checked
- Display: Thousands Separator — None
- Display — Private, checked

As part of the Request to Initiate Partnership process

1. Based on already determined process, Partner is sent an automatic email with a custom link that includes the Parent Site NID
2. Partner clicks the link in the email and completes the form

    a. Upon submission a Log Entry is automatically created on the Parent Site with a link back to the submission
3. Any other signatures that are required are captured based on the identified process (optional)

As a stand-alone process for a specific Partner

1. From your dashboard, click the **View Parent Sites list** button in the upper right
2. Select the Parent Site of the Partner you want to send the Agreement to and click on the name
3. On the Parent Site page click the **Form Link(s)** button in the upper right, a popup will appear
4. Copy the link for the appropriate form and email it to the Partner for them to complete
5. Partner clicks the link in the email and completes the form
    a. Upon submission a Log Entry is automatically created on the Parent Site with a link back to the submission
6. Any other signatures that are required are captured based on the identified process (optional)

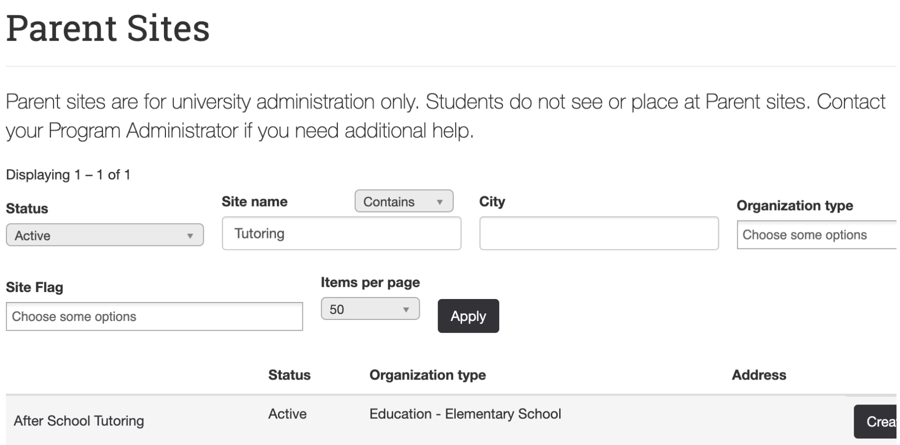
Accessing Agreements

Once your agreements are on S4 anybody with the **Program Staff** role can search and view agreements. Depending on what you're trying to achieve, and which option you're using, there are multiple ways of accessing agreements.

Within the Parent Site

If you are trying to check the status of a contract for a specific site, then your best bet is to check the Parent Site directly. You can search through a list of Parent Sites by clicking the **View a List of Parent Sites** button in the upper right of your dashboard.

1. From your dashboard, click the **View a list of Parent Site**s button in the upper right
2. On the list of Parent Sites find the site whose contract you want to upload using the provided filters, and click on the site name



4.

3. On the Parent Site’s main page click the **Log Entries** tab
   (Screenshot will be added shortly)
4. View the Site’s Log Entries
   (Screenshot will be added shortly)

Getting a Report of Expiring Agreements (and sending an email!)

Please review the following Help Doc that includes detailed instructions on running the report and sending emails to site contacts: Sending "Contract Expiring" Notification Emails

Inter-Campus Agreements

We highly encourage campuses to work together in finding common partners so that they can create inter-campus Agreements that cover multiple campuses simultaneously. Once these types of agreements begin taking place, S4 can help make it even easier to access and identify them. CO-level agreements for specific state-wide partners are being explored, but regionally, this is a much better solution.

How can I get started?

Below is the suggested method, and we encourage our advanced users to add these pieces to their RTIP. Please contact S4 Support if you need assistance in implementing these suggestions.

- **Implement a Request to Initiate Partnership form**
    - Ask the question: “Are you working with other CSU campuses?”
        - Then after reviewing, talk with those campuses
    - **Form set-up**
        - “Are you working with other CSU campuses?” (listbox yes/no)
        - If yes, then show: (conditional)
            - List of campuses (pre-built list)
            - Do you have a contract with them (listbox yes/no)
            - What kind of service are the students doing with this campus (text box)