

Creating Amendment to Agreement

- From the *Research Documentation/Extramural Agreements* screen, click **Active** and **416/417/Agreements/421** from the Menu Bar.
- On the query screen, enter the project number, accession number, or agreement number to find the project, and click **query** or press **Enter**. The project will then be displayed on the List screen.
- Mark the project and click **Action** and **Create Work Record – Amendment**. The system will ask if you really want to create a work record. Click **Yes**. Once the work record is created, exit out of the Active file and go to the Work file.
- Click **Work** and **416/417/Agreement** and the List screen will be displayed.
- Select the project to modify by placing a check in the box to the left of the project number or by moving your cursor over the project.
- Go to **Comments** field and enter the reason for the action. For example, Extending term date from 08-01-19 to 08-01-20 and adding FY19 funds of \$20,000 from incoming project 5030-21000-054-01I.
 - If extending term date, go to **Project Info** tab and change term date to new term date.
 - If adding funds go to **Budget** tab, enter Funding Project, Accession, Account Code, Amount and FY.
- Click on **Forms, Agreement Info** (AIMS).
- Enter into **Comments**: Amendment # for the purpose of extending term date to 8-1-20 and adding FY19 funds of \$20,000. Also provide the justification for the additional funds and time.
- Click on **Forms**, click on **SOW/Budget**
- If including an amount for personnel please include all required info: what job types, number of each job type, duration for each and salary and fringe (if applicable).
- For NACA type of agreements, complete all tabs. The **Reimb/Recv** and **Reimb/Recv (cont)** tabs should total the amount you are adding at this time. **Coop Contrib** and **Coop Contrib (cont)** amount should be no less than 20% of the amount ARS is providing to cooperator.

OUTGOING AGREEMENTS – Step by Step Summary

You must complete all the fields for ARS PI and Cooperator Info tabs in AIMS. Include the email address and phone number along with the address. Upload a copy of your AD700 for NACAs and CAs for your AO. I've included a step by step below to provide additional clarification.

Outgoing-AIMS

Complete the following tabs:

Agreements

Agy/ARS PI/Finance

Cooperator Info

Click on Forms, SOW/Budget

Enter Statement of Mutual Interest information

Parties Agree to - both fields Cooperator Agrees to: and ARS Agrees to:

Enter info Reimb/Recv-Reimb/Recv (cont)

Enter Coop Contrib - Coop Contrib (must be at least 20% of the amount we are giving to the cooperator)

Upload AO copy of AD700

NOTE: On any of the above where you are using the ARS Agreement format we need to be sure the Scientist is clearly spelling out the work to be performed by both parties. Without good information in this area it is hard to judge if the work has been done in the event the agreement needs to be terminated for non-performance.