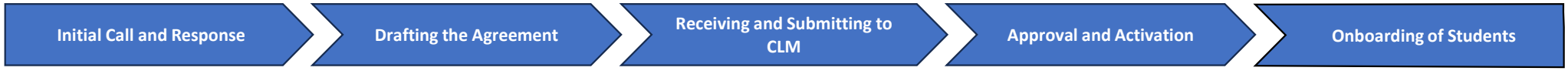
Outlining the Amendment Process for Affiliation Agreements



Initial Call and Response Requests for amendments are forwarded to the Ops Analyst. Use CLM to ensure the program is not included in the current agreement with the university/college. Once confirmed, request that a university/college representative reach out to you to begin the amendment process.	**Drafting the Agreement** Once you've spoken with the appropriate external representative, and confirmed the need for an amendment, begin preparing the amendment template to be emailed to the external party for completion and legal review. If the amendment is for an agreement that was not completed on the legal-approved 2023 template, the current affiliation must be replace with the new template. The additional program can be added to this agreement.	**Receiving Redline and Submitting** Once the external party returns the agreement, the template is assessed for any substantive changes. This will determine the CLM workflow to which the agreement is submitted. • **No revisions** = quick approval time, often within 2 weeks • **Revisions** = advised to allow 90+ days for legal review by both parties before signatures and approval Regardless of the CLM workflow used, we advise that an additional 30 days be allowed for onboarding and Epic training as needed.	**Signatured Approval and Activation** Once the agreement amendment has been signed by both parties, the agreement moves through the activation phase and a fully executed document is distributed to both parties.	**Onboarding the Students** Once the agreement is active in CLM, notify the education specialists here in Academic Affairs. They work with the student on completing the necessary forms, issuing a badge, setting up Epic Training, and more.
Which schools and school representatives would I be working with? Would I be the main contact for this project? Which programs would need to be added for each school?	Are the agreements on up-to-date affiliation agreement templates or will amendments require replacing the agreements with the 2023 version? When would we like to have these agreements approved by? When are the students from the additional programs expected to start rotating? Are there any considerations we can make that would allow for more flexible amendments in the future?	Who would be the internal reviewers for these amendment workflows in CLM? Who would be the internal and external signatories for these agreements? Are the any considerations that need to be made in the CLM workflow that is specific to Workforce Development?		Will any of the programs require Epic Training? Are there any additional questions we should ask Jordan and Jenna?

Outlining the Amendment Process for Affiliation Agreements

Initial Call and Response	Which schools and school representatives would I be working with?	
	Which programs would need to be added for each school?	
	Would I be the main contact for this project?	
Drafting the Agreement	Are the agreements on up-to-date affiliation agreement templates or will amendments require replacing the agreements with the 2023 version?	
	When would we like to have these agreements approved by?	
	When are the students from the additional programs expected to start rotating?	
	Are there any considerations we can make that would allow for more flexible amendments in the future?	

Receiving Redline and Submitting to CLM	Who would be the internal reviewers for these amendment workflows in CLM?	
	Who would be the internal and external signatories for these agreements?	
	Are the any considerations that need to be made in the CLM workflow that is specific to Workforce Development?	
Onboarding of Students	Will any of the programs require Epic Training?	
	Are there any additional questions we should ask Jordan and Jenna?	