Customer Agreement Module (CAM)
Frequently Asked Questions (FAQ)

GENERAL

Q: What is CAM?
A: The **Customer Agreement Module (CAM)** is an application within the Program Support Center (PSC) *WorkSmarter* platform developed as the enterprise solution for the U.S. Department of Health and Human Services' Service and Supply Fund (SSF) and each of the budget offices to centralize the location of all customer agreements and supporting documentation. Additional CAM impacts include:

- Standardize the approval process.
- Improve reporting and data transparency.
- Facilitate the billing process by establishing projects in PSC's Revenue Invoicing and Cost Estimation System (PRICES).
- Manage SSF activities to make sure customers are not over billed.
- Ensure data integration sending and retrieving invoices to/from PRICES for to provide the balance of each agreement.
- Receive the invoice collected amounts from the Department's financial system (UFMS) to provide the SSF activities a status on what customer invoices have, or have not, been collected.
- Allow each of the SSF budget offices to quickly assess the status of their budget authority while providing transparency and accountability into each of each activities line of business.
- Improve the customer experience.

Q: Where is CAM located?
A: CAM is an application hosted on the PSC WorkSmarter platform. The URL for this website is https://worksmarter.appiancloud.com

Q: What is the contact information for the CAM Help Desk?
A: The WorkSmarter Help Desk provides assistance for the CAM application. You can contact them by submitting a ticket via the Help Desk module within WorkSmarter, by calling 301-492-4555, or by emailing worksmarter@psc.hhs.gov.

Q: How do I receive access to CAM?
A: Contact the WorkSmarter Help Desk and let them know if you will be entering agreements/orders (as an Agreement Specialist), approving agreements (as a Budget Office Approver) or if you will be a read-only user for a servicing activity or budget office. Providing the help desk with the name of a user with a similar role will help determine how you should be provisioned.

Q: How often does CAM interface with PRICES?
A: The CAM > PRICES transmission process is a manual process at this point, performed by the WorkSmarter Operations and Maintenance (O&M) team. Feeder files to establish PRICES projects for CAM records are usually transmitted once a week, and right before the billing period closes at the end of each month.

Q: Which types of agreements and orders should be entered in CAM?
A: Any agreement/order where the SSF activity is the servicing agency/service provider and the customer agency is not able to use G-Invoicing for their Interagency Agreements (IAAs). ALL Intrafund agreements (agreements where both the service provider and the buyer are members of the SSF) must be processed via CAM.

You will <u>NOT</u> enter agreements or orders in CAM for agreements where your SSF activity is the customer/requesting agency.

Q: Does CAM capture information from the 7600As or only the 7600Bs?
A: For orders against non-intrafund agreements, most of the information captured in CAM comes from the 7600B. There are a few data fields that are pulled from the 7600A. A previously signed, fully executed 7600A is required to be uploaded on every non-Intrafund agreement for record-keeping purposes.

Q: Does CAM have the ability to track 7600Bs to a particular 7600A to make sure agreements do not exceed the 7600A?
A: Currently, the Budget Office has the responsibility to track and make sure the 7600B does not exceed 7600A.

Q: Can CAM data be exported or sent to another system?
A: The various CAM reports can all be exported to spreadsheet format. There are currently no APIs that allow other systems to connect to CAM to retrieve data.

Q: Are there CAM user guides and videos available on how to use the application?
A: Yes. The CAM User Guide and other resource documents are available within the "Supporting Documents" section of the app. On-demand training videos on how to create and approve an agreement have been posted to the PSC WorkSmarter channel in Microsoft Stream.

Q: Can customer users/signers be given access to CAM to provide data or edit PDFs?
A: This is not available at this time. The CAM team is researching ways to allow customers to provide data via CAM prior to signing in DocuSign, but this is a work in progress.

FOR AGREEMENT SPECIALISTS

Q: In the "Attachments" tab, what occurs if I select the "Yes" check box in the "Send to Customer" section?
A: Once the agreement/order record has been approved by the budget office, all documents with the "Send to Customer" box checked will be emailed to all points of contact entered on Points of Contact tab.

Q: Who is required to use DocuSign?
A: All member servicing activities of the SSF are required to use DocuSign to acquire signatures, a policy which took effect in FY22.

Q: Have the customer signers been informed of this DocuSign process?
A: The WorkSmarter O&M Team did not notify customer signers of this process. When an agreement/order is routed for signatures, an email is automatically sent from CAM to the signing POCs to inform them that they will be signing via DocuSign. It's the agreement specialist's responsibility to ensure the customer can sign in this fashion.

Q: How can I see which actions are pending signatures?
A: From the Agreements tab, use the filters to display those records that are in "Out for Signatures" and "Pending Budget Office Approval" status. Within an individual agreement/order record, you can navigate to a specific attachment to view the signing history of that attachment.

Q: In which order are signatures requested and received?
A: The documents are sent to signatories in the following order:

1. Requesting Agency Program Official
2. Requesting Agency Funding Official
3. Servicing Agency Program Official
4. Servicing Agency Funding Official

A signer will NOT receive the email from DocuSign until the previous signer has signed.

Q: What if the customer wants others to review the agreement first?
A: There is an initial email sent to all Points of Contact that includes all attachments/supporting documentation. Our recommendation is for the customer to forward those documents to whomever needs to review the document before the Requesting Agency Officials sign. Additionally, they can forward the email received from DocuSign to the reviewer with the instructions to review only and not sign the document.

Q: My customer does not want to use DocuSign, what can I do?
A: Contact the SSF Fund Manager's office.

Q: What is the DocuSign email address that sends the emails?
A: The emails are sent by dse_NA4@docusign.net – customers should add this address to their safe senders list. Email clients may display the sender either as "DocuSign via DocuSign" or "WorkSmarter via DocuSign".

Q: Where is the "How to Sign with DocuSign" guide?
A: This guide, as well as the CAM user guide and FAQs, are located on the CAM main page

Q: My customers are not receiving the DocuSign emails. Can we resend them?
A: Contact the WorkSmarter Help Desk to research and resend the emails. The Help Desk can see when DocuSign sends the emails to the recipients but cannot determine when the message was delivered by their mail system to their inbox.

Q: My customer needs to reassign a routed attachment to a different signer. How is this done?
A: When the customer receives the email from DocuSign to sign the document and clicks the link to view the document on the DocuSign website, they have the option to "Reassign". They can use this feature to enter the email address of the new signer. Once the new signer completes the signing process, the document will automatically route to the next signer in the workflow.

Q: What do I do when one of my signers is OOO and unavailable to reassign the document to a different signer? A: In this scenario, you will need to recall the agreement/order, upload a new copy of the PDF with the correct signer information on it (for non-intrafund orders only), update the POCs to an available signer, and then re-route the record for signatures. All signers that have already signed will need to sign again.

Q: Can customers make changes to the forms when they sign?
A: The customer cannot change the data that is on the form, but they do have the ability add new information, such as additional text, checkmarks in check boxes, or the current date. The functionality is very similar to the Fill and Sign tool in Adobe Acrobat/Reader.

Q: Can signers sign with their government PIV/CAC?
A: Signing with a government-issued PIV or DOD CAC (Common Access Card) is not supported at this time.

Q: Will my signers receive reminders when they need to sign?
A: DocuSign will automatically email signers every 2 days when a document is awaiting their signature. After 90 days, the document expires and must be re-routed.

Q: How do I know when my project has been established in PRICES?
A: Any record in CAM that is in "Final" status has been established as a project in PRICES. Notifications are also sent with the list of your records that have been finalized the previous day.

Q: Should I create a record in CAM for agreements/orders where my SSF activity is the customer?
A: No, only agreements and orders where the SSF activity is providing the services should be entered in CAM.

Q: My customers have already signed the order – should I resend to them via CAM and DocuSign for signature? A: Contact the WorkSmarter Help Desk to discuss. All signatures should be obtained via DocuSign; this process came into effect in FY22.

Q: How do I request a new PRICES customer to be added to CAM?
A: CAM uses the same customer list that exists in PRICES, so the customer must be established in PRICES before it can be selected in CAM. Submit the PRICES Customer Request form to the PRICES@psc.gov email box like you have done in the past. Once the customer is established in PRICES, it'll be created in CAM. A blank copy of the form can be requested from the PRICES team.

Q: I am trying to create a new agreement/order record but the cost center providing services is not listed as an option – how can I request it to be added to CAM?
A: Contact the WorkSmarter Help Desk on 301-492-4555 or submit a ticket via the Help Desk module on the WorkSmarter website with the cost center number and name and it can be quickly added to CAM.

Q: What if my POCs are not listed when I search for them in CAM?
A: Below the POC fields is a link to create a new POC in the CAM POC database. After you add your POC via this link, you'll be able to search for that POC and add it to the agreement record.

Q: How do I delete/cancel an agreement/order or modification?
A: Users can delete a record that is in Draft status by navigating to the Related Actions tab for the given record. This action is permanent and cannot be undone. To cancel a finalized agreement/order, a modification must be created and routed with the "Cancel Agreement" option chosen for the Reason for Modification field. If you want to cancel a record that has not yet been finalized, contact the WorkSmarter Help Desk.

Q: How do I know which TAS (Treasury Account Symbol) to select in CAM?
A: The TAS is a field on the 7600B form – enter it exactly in CAM as it was entered on the 7600B. Make note of the ATA and AID fields – many agencies can use the same MAIN, so be sure to select the one that corresponds with the correct ATA/AID. If the ATA or AID on the selected TAS does not match the AID for the PRICES customer, the project cannot be established in PRICES. In this case, either the TAS will need to be corrected, or a new customer will need to be created in PRICES with the corresponding AID.

Q: My customer does not provide their Obligating Document Number (ODN) until after they receive the fully executed order. What should I enter before I route for signatures?
A: ODNs are not required prior to budget office approval. Leave the ODN fields blank – you can edit the ODNs after the budget office has approved the agreement. Do NOT enter a placeholder. **NOTE**: An ODN is required on non-intrafund agreements before the project can be established in PRICES. The SSF terms and conditions stipulate that the ODN must be provided within 10 days of agreement execution or the end of the month, whichever comes first.

Q: My agreement/order has been approved by the budget office, but I need to change some data – how can I do this?
A: If your agreement/order is in Final status, then it has already been sent to PRICES as a new project. In this case, you will want to modify your agreement to make your changes. If the agreement/order is not yet in Final status, you can still click Edit Agreement to make changes that do not require Budget Office approval, including the PRICES customer, TAS, ODNs, and description. If you need to change the amounts or the dates, you will need to "Recall Agreement" to move the record back to draft status, after which you will re-route the record to acquire new signatures. **NOTE**: Recalling a document will notify all signers that the document has been recalled, and the agreement/order will need to be re-routed for signatures.

Q: How do I correct an ODN after a record has been finalized?
A: Create a modification in CAM and select "No New Funding – ODN Correction" as the "Reason for Modification." You will not be required to upload new documents or route the record for signatures.

Q: I need to modify an agreement/order from a prior year – should that be done in CAM?
A: Yes. Many agreements from prior years have already been loaded from PRICES into CAM – the agreement number in CAM matches the project number that was used in PRICES. You can modify this agreement in CAM as you would any other agreement record. If your agreement record cannot be found in CAM, or it was never established in PRICES as a project, contact the WorkSmarter Help Desk. Also refer to the "Deobligating Pre-CAM Agreements and Orders v20220613" help guide saved on the CAM Main tab.

Q: How is CAM impacted by G-Invoicing?
A: G-invoicing is a platform hosted by the Department of Treasury, which tracks and establishes all IAAs (General Terms and Conditions – GT&Cs) and orders against those IAAs/GT&Cs. The SSF began using G-Invoicing with the start of FY24 – all new non-intrafund agreements and orders should be entered, routed, and approved in the G-Invoicing system. The only records that will still be processed via CAM are:

- Intrafund agreements

- Non-intrafund agreement orders where the customer agency does not yet use G-Invoicing
- Modifications to all pre-FY24 agreements and orders, including non-intrafund records of existing, pre-FY24 agreements and orders were not imported into G-Invoicing, so all changes to those records must be made via CAM

FOR BUDGET OFFICE APPROVERS

Q: I received a notification for an agreement/order that requires approval, how do I approve the record?
A: Click the link in the approval email to log into CAM and approve. You will need to sign each document that requires your signature, and upon signing all documents, click the "Enter Decision on Agreement" button to approve the agreement/order record in CAM. This process will send the fully executed agreement/order to all POCs.

Q: For documents requiring signature approval, am I required to print, sign, and upload the approved document into CAM? Or can I download the PDF, sign it with my PIV, then re-upload it?
A: No. You must digitally sign documents within CAM. To digitally sign the document, select the "Continue" button in the top banner, select the "Start" button with the document view or scroll to the section requiring your signature, select the "Sign" button within the document in DocuSign, and your signature will automatically be inserted. Select the "Finish" button in the top banner tab to automatically pull the signed document from DocuSign back into CAM.

Q: When I attempt to sign an attachment, I am receiving a message saying that my attachment needs to be processed. What does this mean?
A: Some attachments are in a PDF format that is not supported by DocuSign. When these file types are encountered, CAM automatically converts the PDF format to one supported by DocuSign. This process usually takes between 5 and 10 minutes. You will receive an email notification when processing is complete. When you receive that notification, attempt to sign the document again and it should work. If you never receive an email, or you receive any other errors, contact the WorkSmarter Help Desk.