

QUICK REFERENCE GUIDE

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Create an Electronic Amendment of a Contract Document Created Outside of SWIFT

Agencies use SWIFT's Supplier Contract module to create a contract shell for a contract. This shell has a SWIFT ID and details about the contract. The agency created and processed the official contract document outside of SWIFT using wet signatures.

There are times when you need create a system-generated electronic amendment to a contract document created outside of SWIFT.

- Create a system-generated electronic amendment when your agency is transitioning from paper to electronic contract management.
- Use SWIFT's document configurator to create an electronic contract amendment.
- You can also route this system-generated contract amendment through collaboration, approvals and signatures through SWIFT.
- Electronic routing through SWIFT allows agencies to reduce or eliminate the need for manual routing and storing of paper contract documents.

Currently, there are 14 electronic amendment templates that agencies can use.

- All agencies can use the P/T Contract Amendment, P/T Work Order Amendment and the Office of Grant Management Amendment templates
- The Minnesota Departments of Administration and Health have approved amendment templates within SWIFT.
- If an agency wishes to add a template, contact the Office of State Procurement.

The Office of State Procurement (OSP) and the Office of Grants Management (OGM) approved these amendment templates. They may update them in SWIFT. Contact these offices if you have questions about these amendment documents.

This guide provides the steps to create a system-generated, electronic amendment to a contract document created outside of SWIFT

Steps to complete

- Step 1: Access the Document Management page
- Step 2: Download a scanned version of the executed contract document
- Step 3: Create an electronic amendment

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

Configurator ID	Configurator Type	Description
OGM_GRANT AMENDMENT	STD	OGM GRANT AMENDMENT
P/T CONTRACT AMEND	STD	MMD P/T Contract Amendment
P/T WORK ORDER AMEND	STD	MMD P/T Master Contract Work Order Amendment
RECS WO AMEND	STD	RECS WO AMEND END DT ONLY
RECS WO AMENDMENT	STD	RECS Consult Supp Agreement/Contract Amend for BSA
RECS_SA	STD	RECS SA
RECS_SA_END_DATEONLY	STD	RECS_SA_END_DATEON_Only

- Indicate whether the amendment represents minor or major version change to the original document.
 - SWIFT defaults to *Minor Version*. Follow your agency’s guidance on tracking contract document versions.
- Enter a comment explaining why the amendment is necessary.
- Press **OK** to process the amendment.

Create an Amended Version

Select amendment option, desired version and comment as to why the amendment is necessary and press OK. Document(s) will then be generated based on amendment option.

Amendment Option: Amendment Files Only

Amendment Configurator ID: MMD_ACQ_AMND_WET

Version: Minor Version (1.01) Major Version (2.00)

*Comments: Amendment Created: Amending the contract document to increase the amount, add to the deliverables and extend the date.

135 characters remaining

3. SWIFT returns you to the *Document Management* page. Update the amendment template.
 - Note that the status is now “Draft.” There is a statement that indicates an imported document.
 - SWIFT adds new buttons on the bottom of the page. You also now have a **View Original Document**, **View Amendment File**, and **Edit Amendment File** buttons.
 - Select the **Edit Amendment File** button to update the contract amendment template.

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

- The *Review and Approval* options allow you to route the contract document for electronic collaboration, approvals and electronic signatures. Approvers can choose to view the original contract document and the amended version. If authorized, they can edit the amended contract document.

Amendment 1	Created On 09/23/19 12:00AM	Document Details
Version 1.02	Amended On 09/23/19 1:32PM	
Status Draft	Last Modified On 09/23/19 1:38PM	
Includes Imported Document		
View and Edit Options:	Review and Approval:	Other Document Actions:
<input type="button" value="View Original Document"/>	<input type="button" value="Route Internally"/>	<input type="button" value="Send to Contacts"/>
<input type="button" value="View Document"/>	<input type="button" value="Route Externally"/>	<input type="button" value="Refresh Document"/>
<input type="button" value="View Amendment File"/>	<input type="button" value="Preview Approval"/>	<input type="button" value="Recreate Document"/>
<input type="button" value="Edit Amendment File"/>	<input type="button" value="Submit for Approval"/>	<input type="button" value="Import Prior Document"/>

You have successfully created a system-generated, electronic amendment of a contract document created outside of SWIFT.