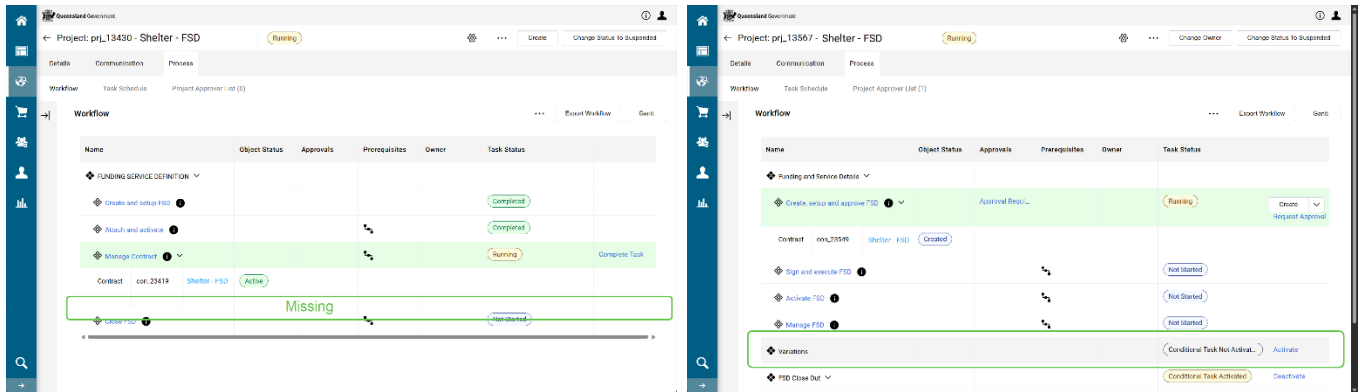


Funding and Service Details (FSD)

Decision

Does the existing FSD project have the Variation Workflows steps included in it?
 (review the example project workflows – i.e. **Process** tab > **Workflow**)



Outcome - NO

Perform:

- the following **Variation FS (Transitional)** instructional steps
- continue process from **Initial Variation (i.e. Amendment)** instructional steps

Variation FS (Transitional)

Create a new TRANSITIONAL project (use template ... prj_16394 (2026.03) Transitional Social Services Contract (FSD) Project (to vary existing contracts)

- **IMPORTANT:** Update the project attribute section (i.e. project > **Details** tab > **Settings**) with the original project number which contains the FSD contract (e.g. prj_xxxx).

In the ORIGINAL project:

Move the FSD contract (e.g. con_xxxx) to the newly created TRANSITIONAL project's workflow task:

Create, setup and approve variation 01.

Complete the workflow task: **Manage Contract.**

Complete the workflow task: **Close FSD**

➔ The project's **Status** will be **Completed.**

Outcome - YES

Perform:

- the **Promote FS contract to project's Variation workflow step** instructions
- Continue process from **Initial Variation (i.e. Amendment)** instructional steps

Promote FSD contract to project's Variation workflow step

Warning: Ensure the FSD contract is in workflow task: **Manage Contract**.

Navigate (via the contract's sidebar menu) to the project's workflow task.

Complete Task in project's workflow task: **Manage Contract**

In the **Promote To Task** dropdown, select **Create, setup and approve variation xx** option (where xx = 01 or the next variation number)

Click **Confirm**

Click **Confirm**

➔ The contract promotes to the selected workflow.

... CONTINUE WITH VARIATION STEPS

Initiate Variation (i.e. Amendment)

These steps are performed from within the ORIGINAL (or TRANSITIONAL) project's workflow task: **Create, setup and approve variation xx**

Open the contract.

EITHER:

Click the **Create Amendment** button (top right of window)

OR

Click **Amendments** tab > **Create Amendment**

- Populate the **Title** and **Description**
- Leave ALL **Amendment Content** checkboxes checked by default

Click **Create Amendment**.

FSD Variation – details to be update

From the FSD contract **Contents Management** tab > **MCD (Proposal Approved)**:

- Click **Create New Proposal**.
- Ensure **From Previous Proposals** is selected in the **Select Proposal Origin** dropdown list.
- (Optional) Click **Upload Annexes** hyperlink
 - Drag and Drop file/s into the **Attachments** box OR click **Select Files**
 - Click **Confirm**.
- Click **Create New Proposal**.

Navigate to the contract's **Contents Management** tab > **Clause Management**.

Click **Update Clause Versions** hyperlink against the **Obsolete Clauses** section (updates to formatting and layout in clauses in the MCD).

Check all the clause revisions listed.

Click **Update Clause Versions**.

Navigate to the Amendment created (on the **Amendments** tab, click the Amendment Title hyperlink)

Click Edit (i.e. Pencil icon - now available as contract in correct workflow task)

- Undertake amendments within Contract Duration, Contract Value, Additional Information sections.

Click **Save**

From the FS contract **Contents Management** tab > **MCD (To be Submitted)**:

- validate there are no unwanted tags in the contract
(e.g. `<_DATA_ELEMENT_CTR.Contract.Variation.Number/>`)
- Click **Confirm Final Approval**.

All variations are entered.

REQUEST APPROVAL (includes auto promotion to workflow task: Sign and execute validation xx)

Navigate (via the contract's sidebar menu) to the project's workflow task.

Within the task, click **Request Approval**.

Request approval from the Senior Director.

Senior Director provides approval.

→ FSD contract automatic promotes to workflow task: **Sign and execute validation xx**.

SIGN, COMPLETE AND MANAGE VARIATION

When wet signatures for the contract:

Upload attachment (Tip: FS contract **Details** tab > **Attachments**).

Navigate (via the contract's sidebar menu) to the project's workflow task.

Click **Complete Task** in project's workflow task (Sign and execute variation xx)

Click **Confirm**

Click **Confirm**

→ FS contract automatic promotes to workflow task: **Complete variation xx.**

Open the FSD contract.

Navigate to the Amendment created (on the **Amendments** tab, click the Amendment Title hyperlink)

Click **Complete**.

Click **OK**.

Click **Save**.

→ FS contract amendment is completed

Navigate (via the contract's sidebar menu) to the project's workflow task.

Click **Complete Task** in project's workflow task (Complete variation xx).

Click **Confirm**.

Click **Confirm**.

→ FSD contract is promoted to workflow task: Manage variation xx.

Review variation

Open the FSD contract and confirm the **Status** is **Active** and all changes have been applied.