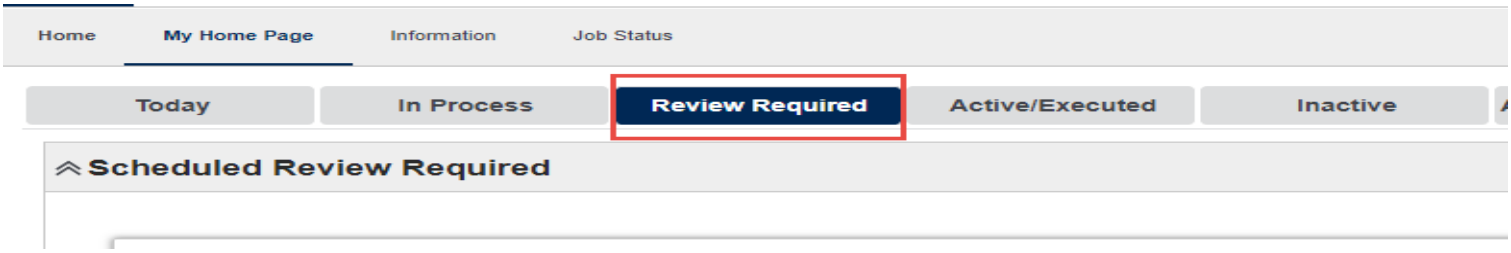
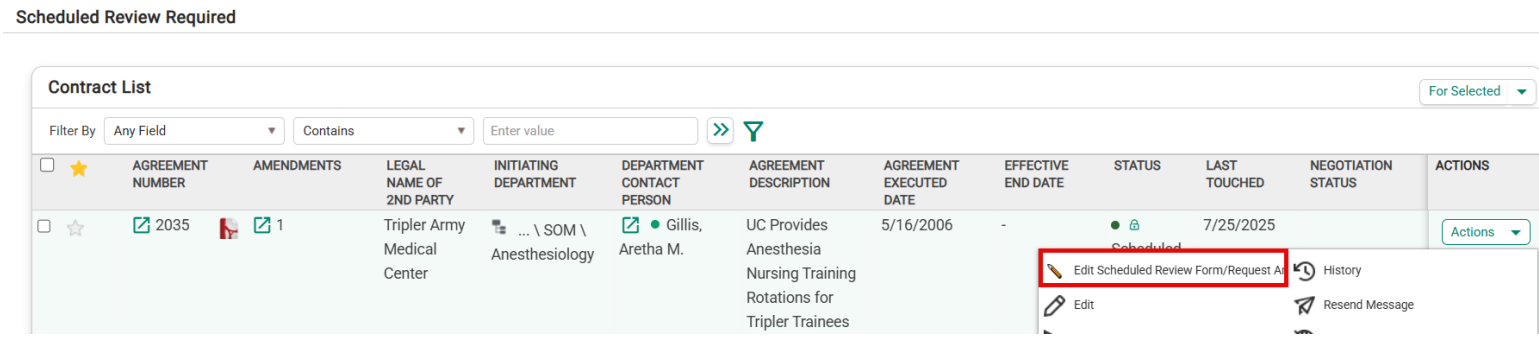
ANNUAL SCHEDULED REVIEW FORM USER GUIDE

Log in to: https://secure.compliance360.com/?Organization=UCDH

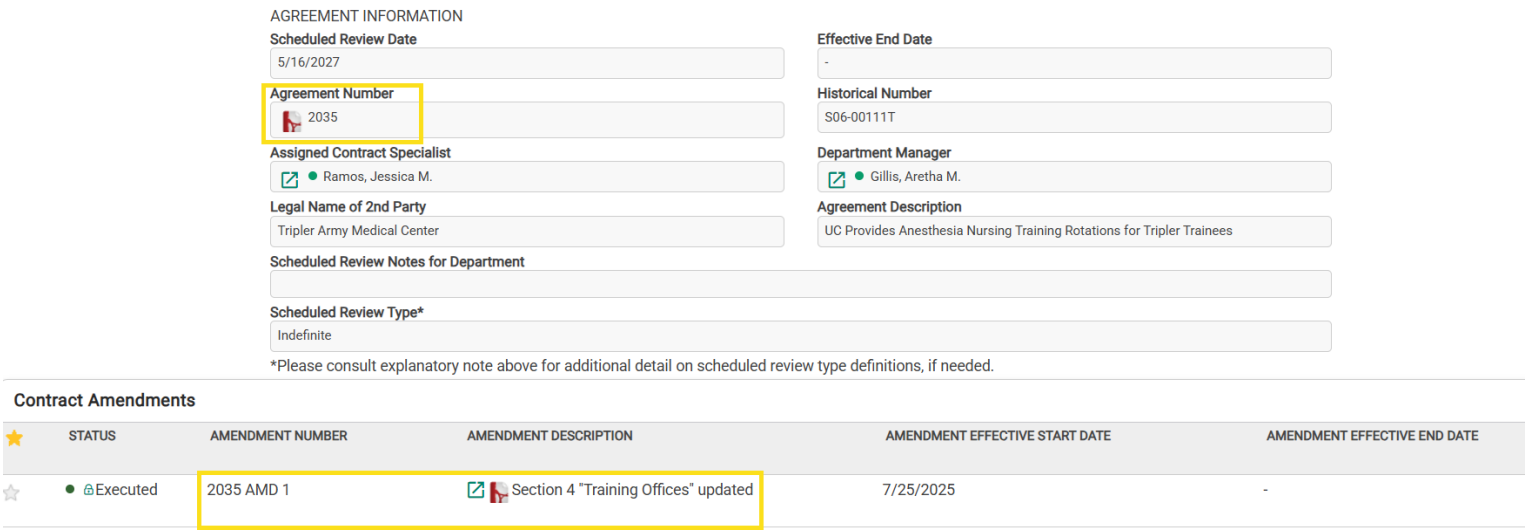
Step 1 – Select Review Required tab (all pending scheduled reviews are in this tab).



Step 2 – Go to Actions and select Edit Scheduled Review Form/Request Amendment to complete. (Do not select Review Complete before editing the Scheduled Review Form, this will send a blank form that will be returned).



Step 3 – Review the base agreement and any amendments to determine if any changes must be made.

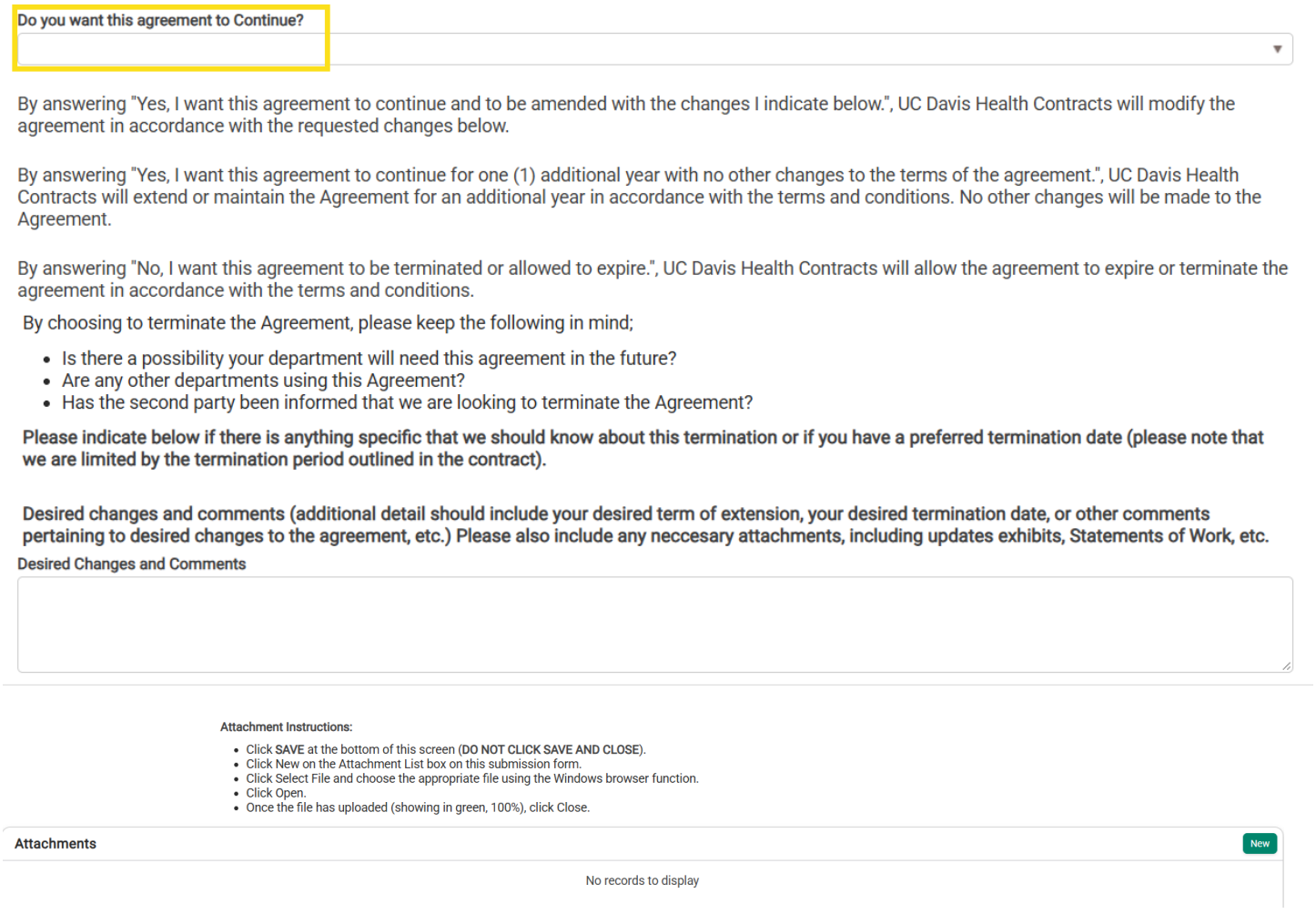


Step 4 – Respond to the Question "Do you want this agreement to continue?" by selecting one of the drop-down responses. The options are (4A), Yes, I want this agreement to continue and to be amended with the changes I indicate below. (4B), Yes, I want this agreement to continue for one (1) additional year with no other changes to the terms of the agreement, and (4C), No, I want this agreement to be terminated or allowed to expire.

4A: If there are changes, please complete the "Desired Changes and Comments" box and attach any pertinent information such as fee schedule, SOW, etc.

4B: If there are no changes, continue to step 5.

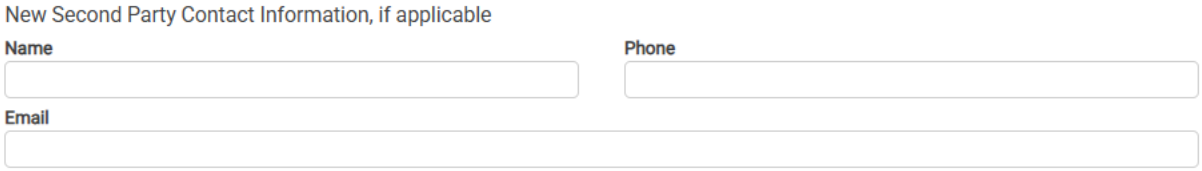
4C: If the Agreement shall be terminated or allowed to expire, please confirm and include any additional information that may be needed for the termination. The "Desired Changes and Comments" box may be used to include any pertinent information.



Step 5 – Respond YES or NO if financials need to be updated. If the Financial Type is Income or Expense and there are changes to financial for this review, include new amount in the Update Financial Amount field.



Step 6 – If necessary, update the Second Party Contact Information.

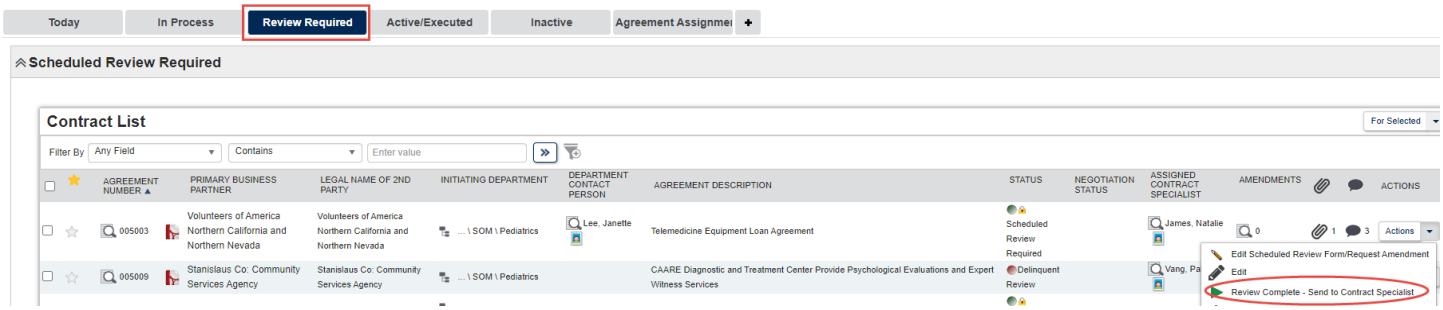


Step 7- Once the SR form is fully filled out with all pertinent information and requests, select save and return on the bottom right of the form. (You can return to this form at any time to complete it if you do not have all the information or are waiting for more information by hitting save and return and then follow through the steps starting with Step 1.)



Step 8 -To submit form, go to Actions and select REVIEW COMPLETE – Send to Contract Specialist.

(Once submitted, the agreement will drop off from the Review Required tab) (If you need to return to the form and make changes, contact the assigned contract specialist or C360 System Administrator and they will return the agreement to your queue)

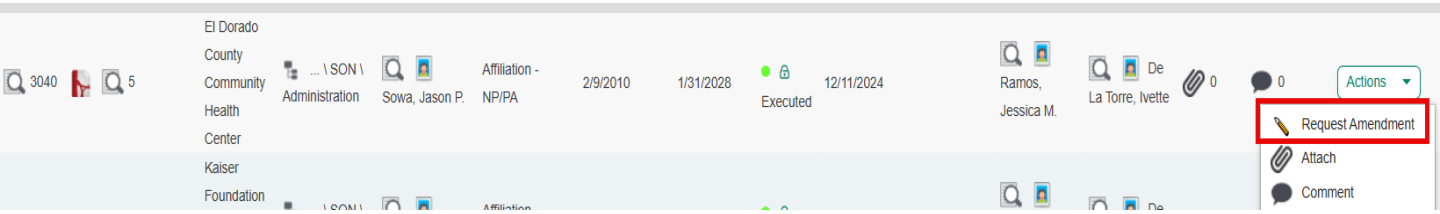


***Forms that are submitted blank or without sufficient information will be returned to the department for completion and resubmission.**

Off Cycle Amendment Request

Compliance 360 has a self-service feature for requesting amendment off cycle. This means the department does not need to wait for the system annual review notifications. The department can request changes at any time. To use the self-service amendment request feature in C360:

Go to the Active/Executed tab and find the agreement number you wish to amend, go to Actions, and select “Request Amendment.”



(Note: the workflow will change from Executed to Scheduled Review Required moving the agreement to the Review Required tab. A system notification will automatically generate and send directly to the department manager – the notification can be disregarded)

Go to the Review Required tab and follow the instructions from Step 1 through 8 above.