

MAYO CLINIC



Master Agreement Application - Quick Reference Guide

June 2018



Prepared for the Mayo Clinic Enterprise
Kahua Deployment

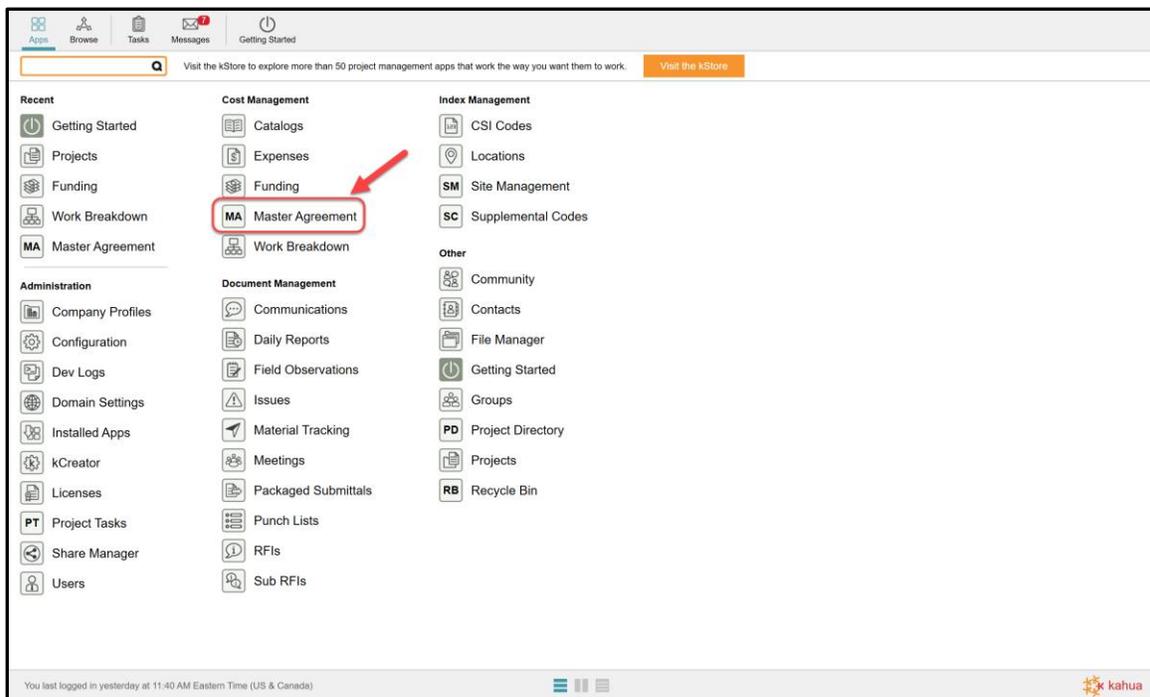
MASTER AGREEMENT APPLICATION OVERVIEW



The Master Agreement application allows users with correct permission levels (typically a site administrator) to enter relevant information around Master Terms for Agreement Between Owner and Contractor or Standard Terms for Agreement Between Owner and Design Professional that have been executed by Mayo Clinic (henceforth referred to as a Master Agreement). This ensures that when contracts are entered in the system, each contract can be tied back to the appropriate Master Agreement for reference and the system has an accurate log of all active, expired, and terminated agreements related to the projects managed in Kahua.

Note that the Mayo Enterprise solution is not intended to initiate creation or execution of the Master Agreement (MA) within Kahua, but rather store a log of the MAs for use throughout Mayo Enterprise applications. The process of the execution of MAs will remain outside of Kahua. Kahua will maintain a log of MAs that are executed and allow users to reference the MAs as appropriate when creating Construction and Design Contracts on projects. The signed MAs will be stored as a reference file in the Kahua Master Agreement application.

The Master Agreement application is in the Cost Management applications suite.



ADDING A MASTER AGREEMENT

To add a Master Agreement (MA):

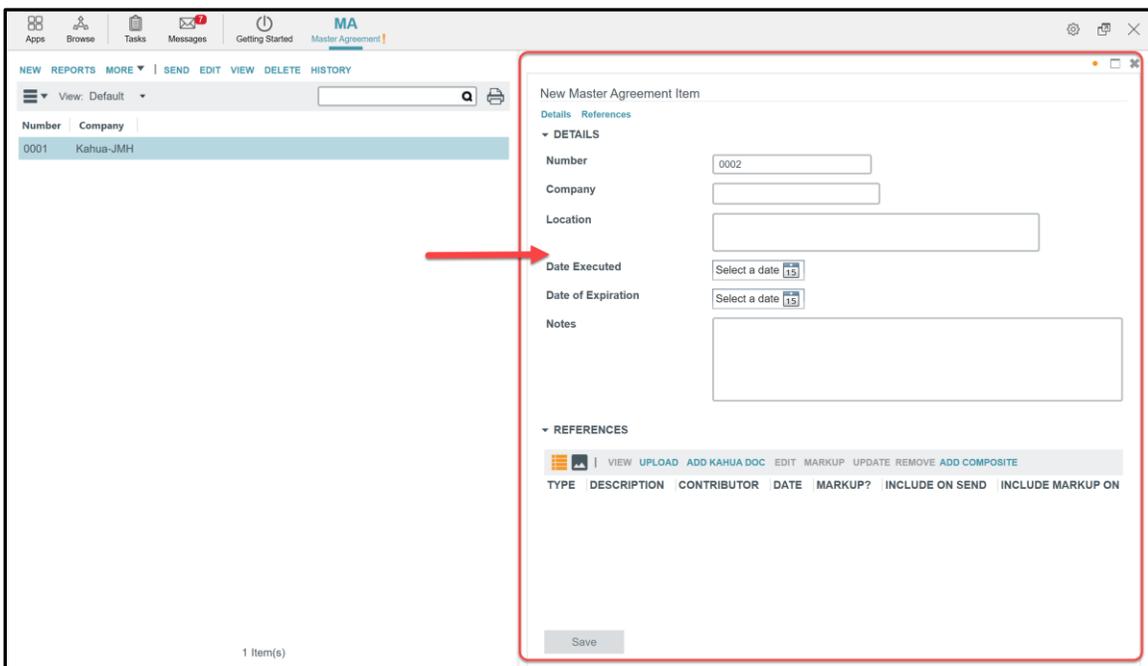
1. Select the Application Launcher



2. Select the Master Agreement application in the Cost Management section.
3. Select *New* to add an MA.



A New Master Agreement Item window appears in the Detail Pane.



4. Fill out the Details section.

▼ DETAILS

Number: 0002

Company: Newman Construction

Location: Arizona, Florida, Rochester

Date Executed: 6/19/2018

Date of Expiration: 6/19/2023

Notes: this is where I write notes

Number –auto-populated when a new Master Service Agreement is added. The number increments by 1 with each new MA.

Company - select the company to add. The company must be previously entered in the Company Contact through the Contacts application.

Location - select the location(s) from the drop-down list. The list looks to the Sites in the Site Management application. This will indicate with which region(s) the company has a Master Service Agreement. Multiple sites can be entered.

Note: Some Master Agreement are national agreements, and some will be site specific.

Location: [Dropdown Menu]

Date Executed

Date of Expiration

Notes

Note: In order for a contract to reference the Master Agreement, the following conditions must be true (reference Section 3 of this document below):

- The Site field in the Location section of the Project Properties must match a location indicated on the Master Agreement
- The Agreement Type field in the Agreement Details section of the Contract must be “Master Terms & Conditions”.

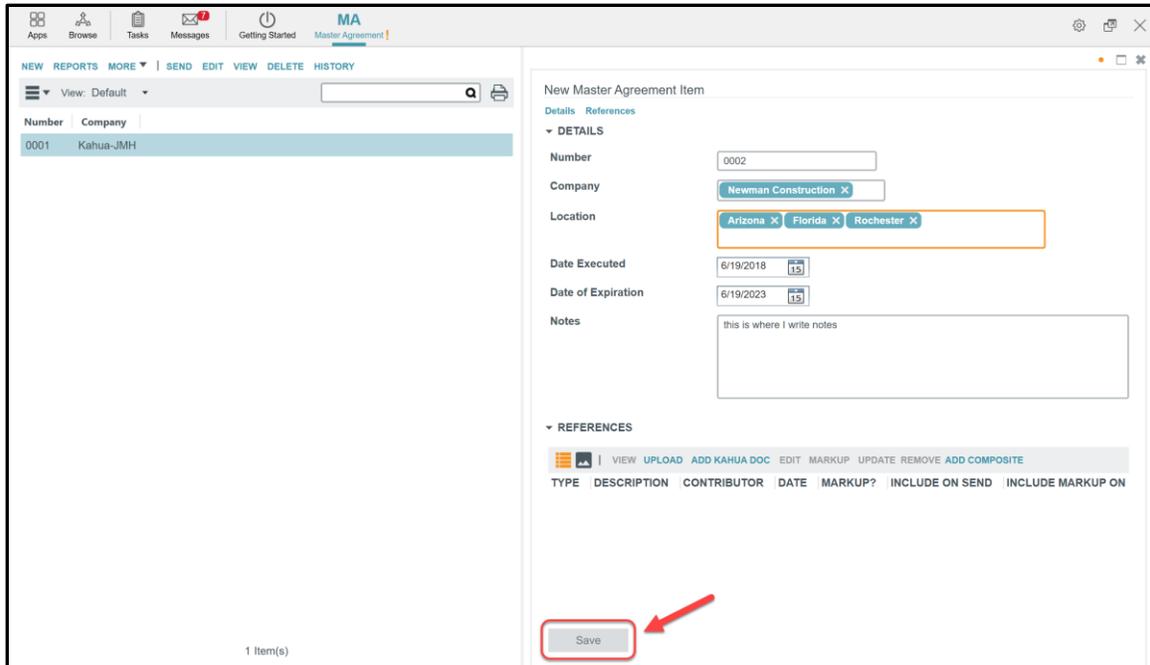
Date Executed/Date of Expiration – Enter the appropriate dates from the Master Agreement signed with the Business Partner.

Notes – Add any necessary notes.

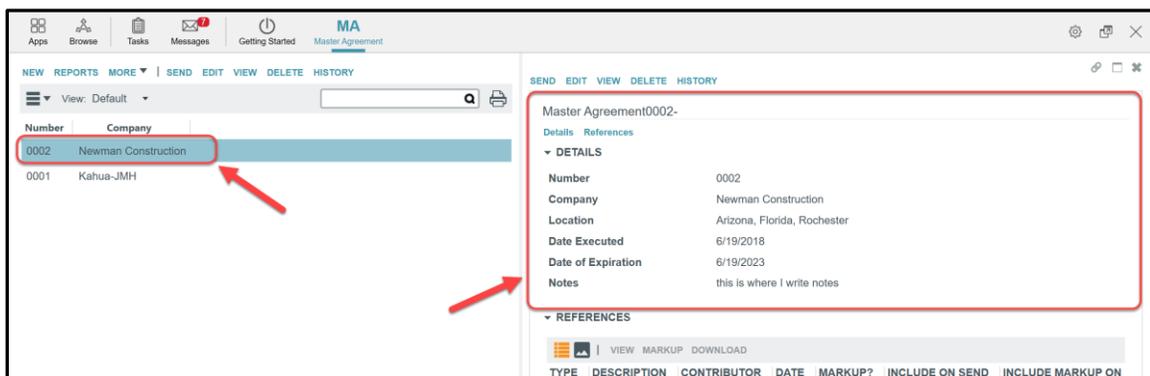
5. In the References section, add documents from your computer by selecting *Upload* or from your Kahua File Manager by selecting *Add Kahua Doc*.



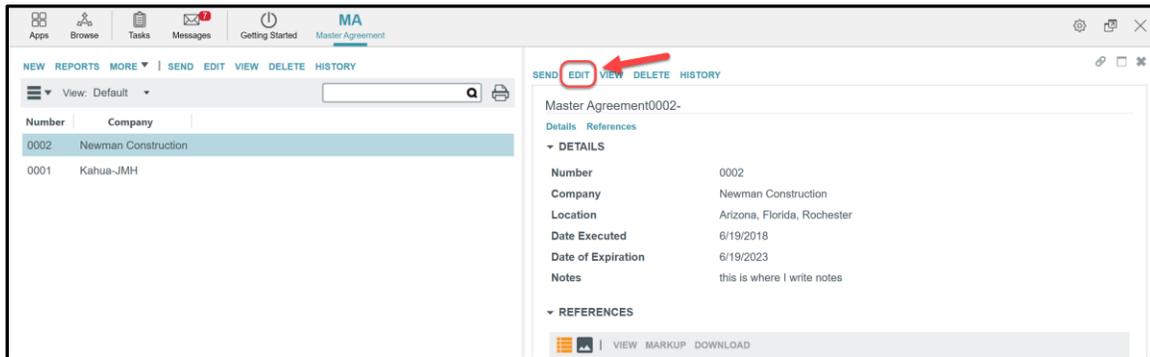
6. Select the *Save* button when done.



The new Master Agreement appears now in the log with the information about that agreement in the Detail Pane on the right.



If information needs to be changed, select **EDIT** then select **SAVE** to save the record.



THE MASTER AGREEMENT IN THE CONTRACT APPLICATION

To create a contract that references a Master Agreement, select *Master Terms & Conditions* in the Agreement Type field in the AGREEMENT DETAILS section while creating a new contract in the Expense>Contract application. This exposes the Master Terms & Conditions selector. The drop-down will list all Master Service Agreements where the **Site** field in the **Location** section of the **Project Properties** matches a **Location** on the Master Agreement. Select the appropriate Master Service Agreement.

Construction contract:

▼ AGREEMENT DETAILS

Type: Construction

Agreement Type: Master Terms & Conditions

Master Terms & Conditions: 0003 - Kearney Electric
Kahua-JMH - [Date]

Delivery Method:

Design contract:

▼ AGREEMENT DETAILS

Type: Design

Agreement Type: Master Terms & Conditions

Master Terms & Conditions: Kahua-JMH - [Date]
Newman Construction - [Date]

Compensation Type: