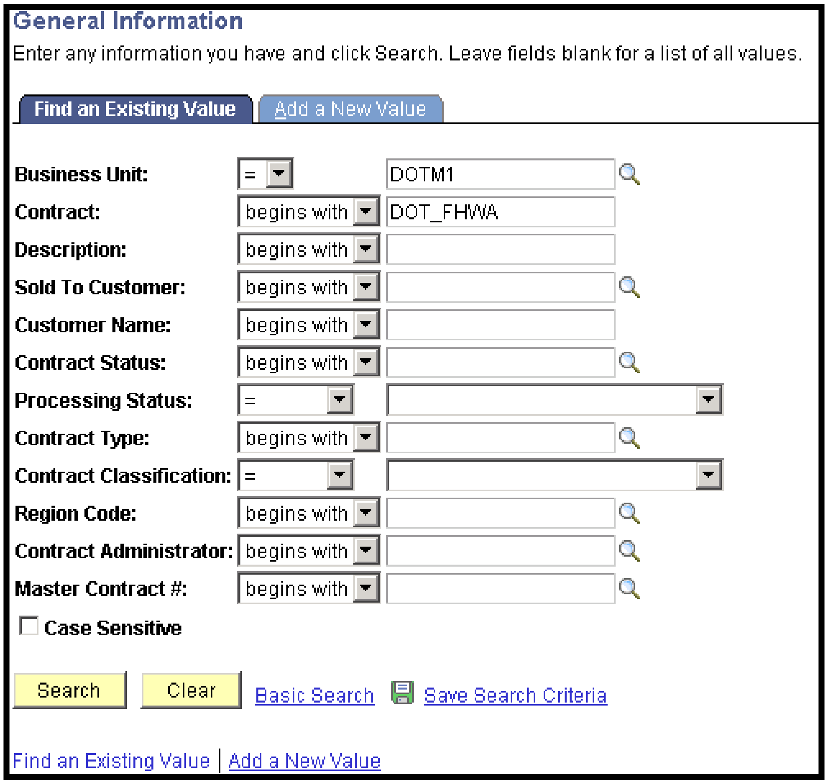
Job Aid

Amend a Contract

If you need to change information on the General tab (Header Section), use the procedure below. If you need to change information on the Lines tab, go to page 3.

1. **Navigate to *Customer Contracts > Create and Amend > General Information*.**
2. **On the Find an Existing Value tab, verify that the Business Unit is correct.**
3. **Type the contract name in the Contract field. <u>Example:</u>** ***[To be entered by Agency SME]***



General Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

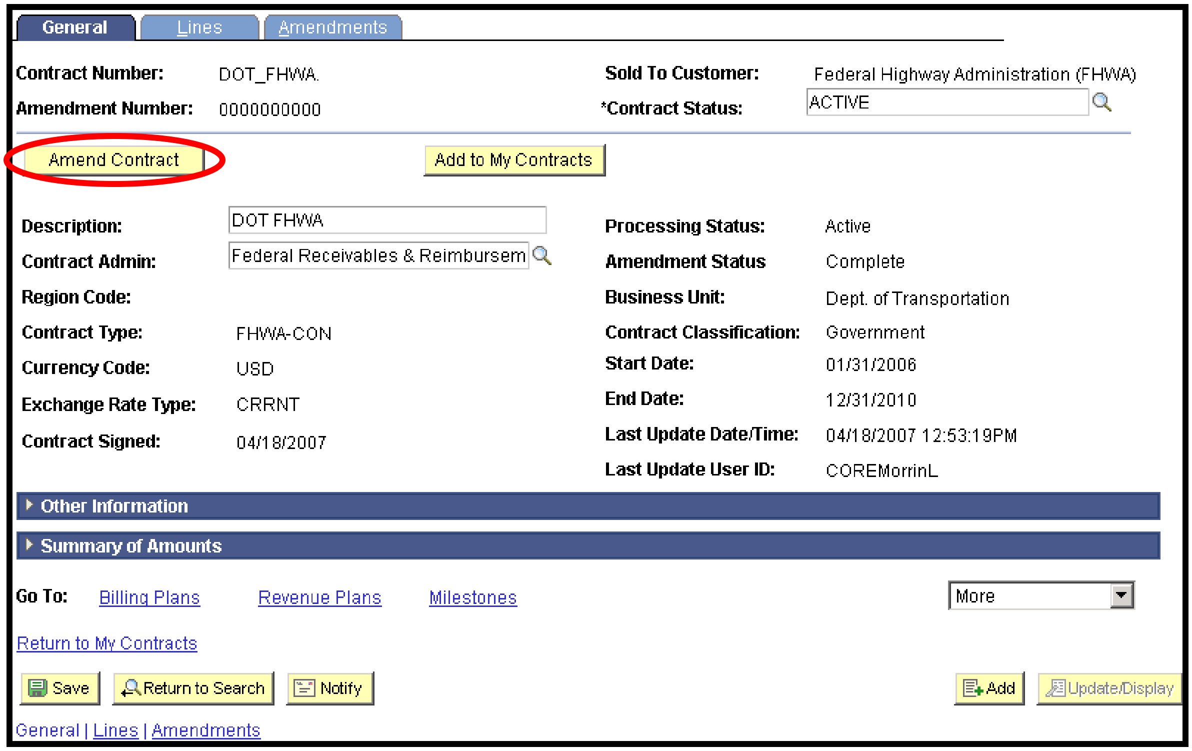
Business Unit:	=	DOTM1
Contract:	begins with	DOT_FHWA
Description:	begins with	
Sold To Customer:	begins with	
Customer Name:	begins with	
Contract Status:	begins with	
Processing Status:	=	
Contract Type:	begins with	
Contract Classification:	=	
Region Code:	begins with	
Contract Administrator:	begins with	
Master Contract #:	begins with	

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

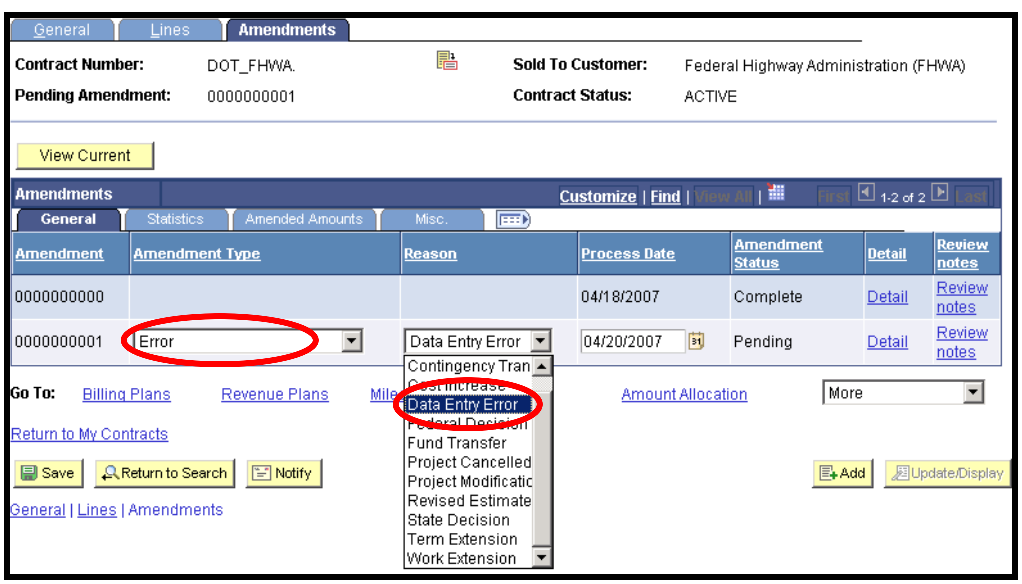
Find an Existing Value | Add a New Value

4. **Click** Search. The General page displays.



5. **Click** Amend Contract. The Amendments page displays. The Contracts Status must be Active for Amend Contract to display.

6. **Select an Amendment Type.** The Amendment Type provides a high level classification of the type of change you are making to the contract. The Amendment Type is for informational purposes only. The Amendment Type is configured differently for each agency. **Example:**
[To be entered by Agency SME]



7. **Select a Reason.** The Amendment Reason page provides a brief explanation as to why an amendment was initiated. The Amendment Reason augments the amendment type and provides additional insight as to the cause for the amendment. The Amendment Reason is for informational purposes only. The Amendment Reason is configured differently for each agency. **Example:** ***[To be entered by Agency SME]***

8. **Click** 

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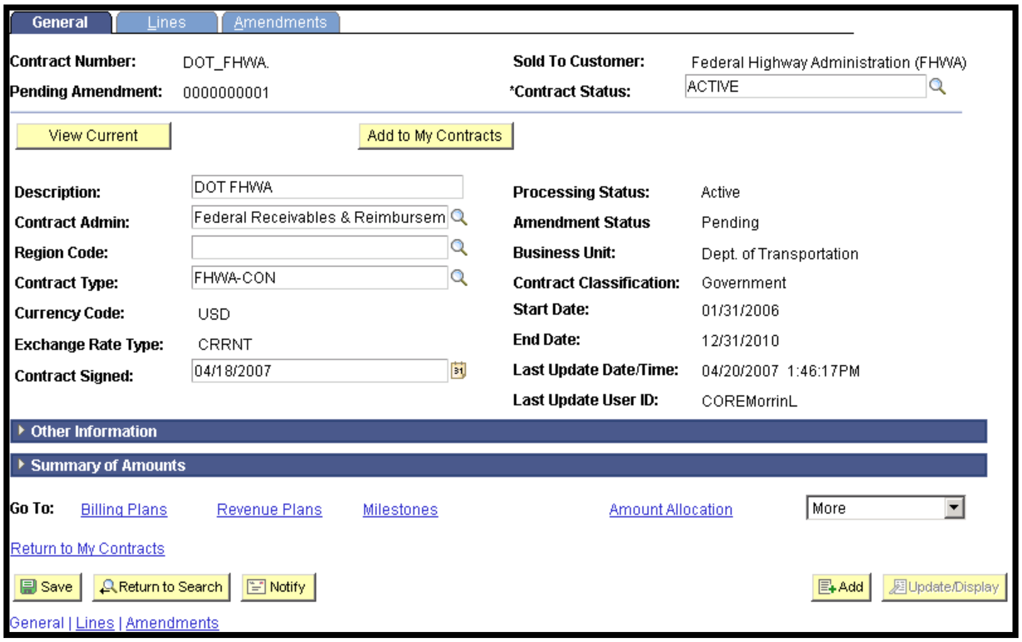
9. **Click the General tab.** The General page displays.



10. **Change the applicable fields that you need to change.**

11. **Click** 

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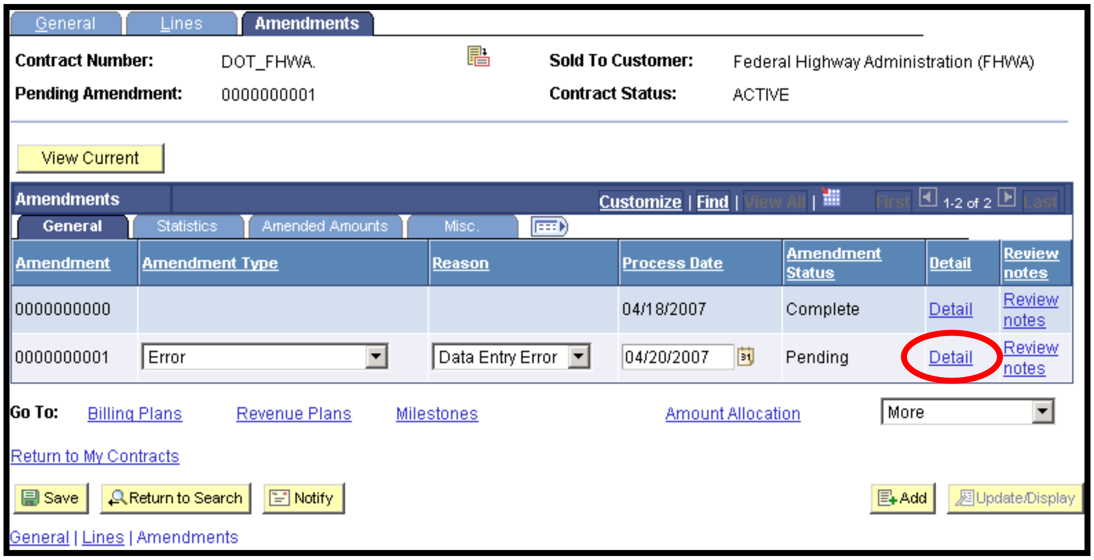
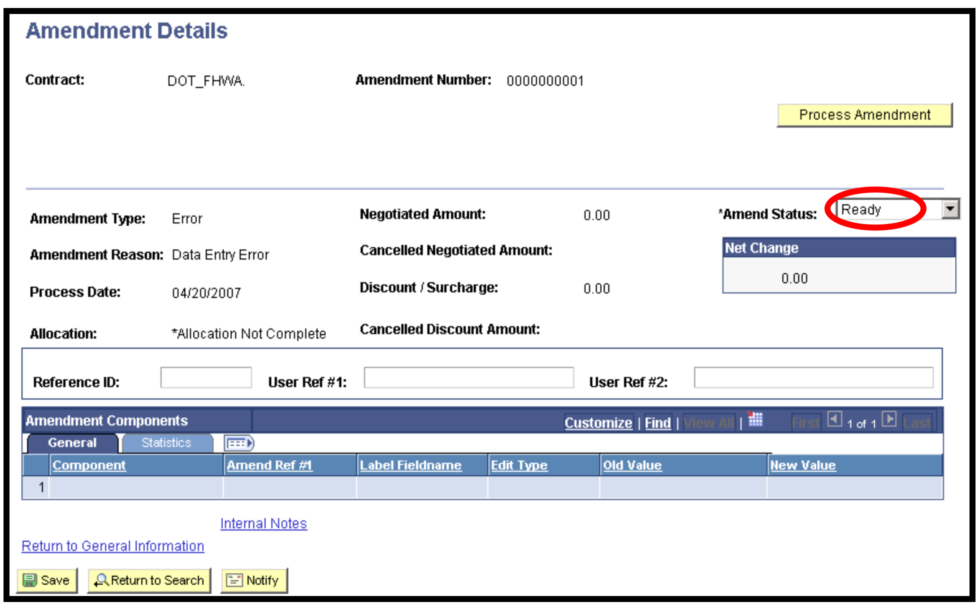
12. **Click the Amendments tab.** The Amendments page displays.

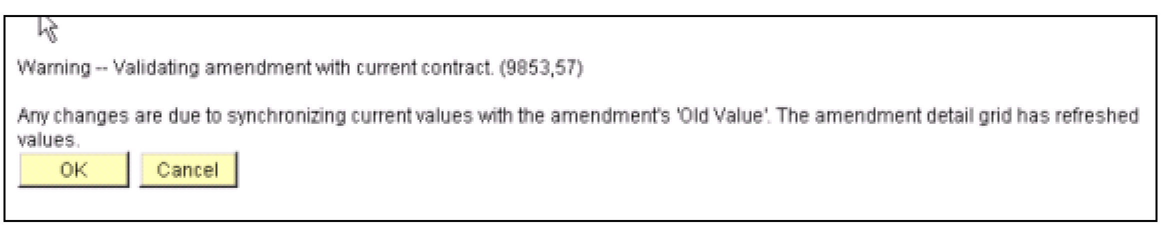


13. **Click** Detail **for the Amendment row.** This is the row with the Amendment Status of Pending. The Amendment Details page displays.



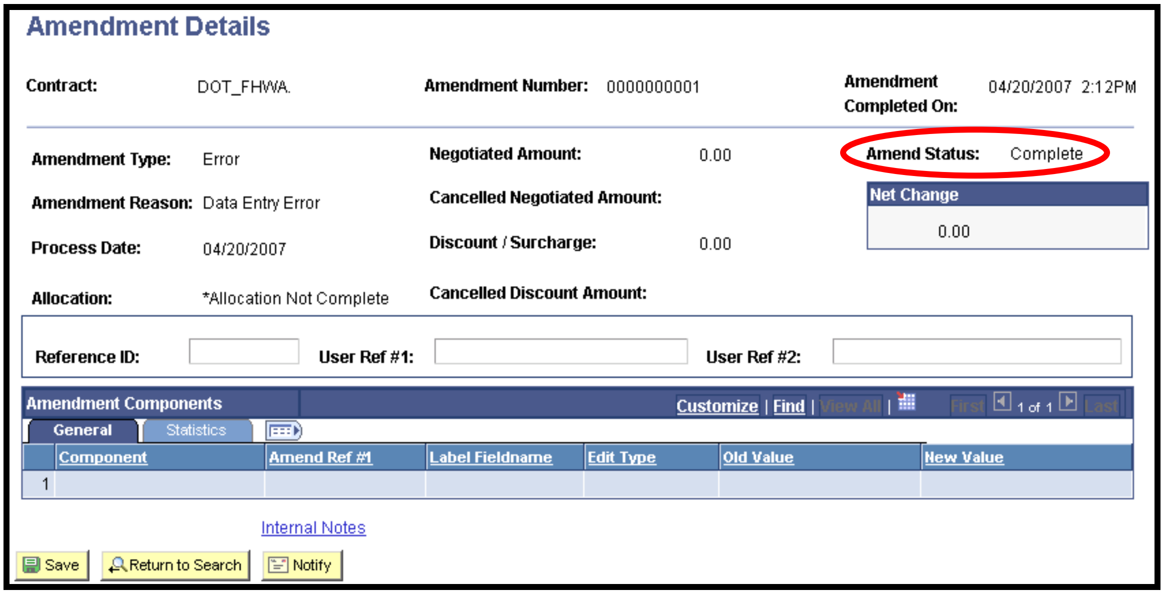
14. **Change the Amend Status to Ready.** The page refreshes with the Process Amendment button.

15. **Click** Process Amendment. The Amend Status changes to Complete.



16. You may get this message when amending the contract. Click OK.

17. The Amend Status changes from Ready to Complete.



18. The amendment to the General Tab (Header page) is now complete.

If you need to add a new contract line, use the procedure below.

1. **Navigate to *Customer Contracts > Create and Amend > General Information*.**
2. **On the Find an Existing Value tab, verify that the Business Unit is correct.**
3. **Type the contract name in the Contract field.**
4. **Click** Search. The General page displays.
5. **Click the Lines tab.** The Lines page displays.
6. **Click** Amend Contract. The Amendments page displays.
7. **Select an Amendment Type.**
8. **Select a Reason.**
9. **Click** Save.
10. **Click the Lines tab.** The Lines page displays.

11. **Click** Add Contract Lines**.** The General Information – Add Contract Lines page displays.
12. **Type your three letter agency acronym in the Product field.**
13. **Click** Search**.** The search results display.
14. **Select the checkbox for the product you want to add to the contract.**
15. **Click** Add Contract Lines**.** The General Information – Add Contract Lines page re-displays without the search results.
16. **Click** Return to Contract Lines**.** The Lines page displays with the additional contract line.
17. **Click** Save.
18. **Follow steps 1 – 25 below in the change contract terms section.** If you add a contract line, you must follow the contract terms procedure below.
19. **If this is a DOT FHWA contract, follow steps 1 – 21 in the change transaction limits section.**

If you need to change contract terms, use the procedure below.

1. **Navigate to *Customer Contracts > Create and Amend > General Information*.**
2. **On the Find an Existing Value tab, verify that the Business Unit is correct.**
3. **Type the contract name in the Contract field.**
4. **Click** Search**.** The General page displays.
5. **Click the Lines tab.** The Lines page displays.
6. **Click the Detail tab on the Lines page.** The Detail tab displays.
7. **Click Contract Terms for the Contract Line you need to change the terms for.** The Related Projects page displays.
8. **Click** Amend Contract**.** The Amendments page displays.
9. **Select an Amendment Type.**
10. **Select a Reason.**
11. **Click** Save**.**
12. **Click the Related Projects tab.** The Related Projects page displays.
13. **Select or type the PC Business Unit.**

14. **Type the Billing Limit.**
15. **Type the Effective Date.**
16. **Ensure the Status is Active.**
17. **Ensure the Rate Selection is Rate Set.**
18. **Select or type Rate Set.**
19. **Select or type a Project.**
20. **Select or type an Activity.**
21. **Click** Save**.**
22. **Click the Contract Amendments tab.** The Contract Amendments page displays.
23. **Click** Detail **for the line with the Amendment Status of Pending**. The Amendment Details page displays.
24. **Change the Amendment Status to Ready.** The page refreshes with the Process Amendment button.
25. **Click** Process Amendment **.** The Amend Status changes to Complete.

If this is a Government Contract, follow the steps below. Otherwise, go to the transaction limits on a contract section below.

1. **Click** Contract Terms**.** The Contracts Amount page displays.
2. **Click** Amend Contract **.** The Contract Amendments page displays.
3. **Select an Amendment Type.**
4. **Select a Reason.**
5. **Click** Save**.**
6. **Click the Contract Amounts tab**. The Contract Amounts page displays.
7. **Edit the Awarded Amount, if necessary.**
8. **Edit the Funded Amount, if necessary.**
9. **Edit the Start Date and End Date, if necessary.**
10. **Click** Save**.**

If you need to change the transaction limits on a contract, use the procedure below.

1. **Navigate to *Customer Contracts > Create and Amend > General Information*.**

11. **On the Find an Existing Value tab, verify that the Business Unit is correct.**

12. **Type the contract name in the Contract field.**

13. **Click Search.** The General page displays.

14. **Click the Lines tab.** The Lines page displays.

15. **Click the Detail tab on the Lines page.** The Detail tab displays.

16. **Click** Contract Terms **for the Contract Line you need to change the terms for.** The Related Projects page displays.

17. **Click** Transaction Limits**.** The Transaction Limits page displays.

9. **Click Amend Contract.** The Amendments page displays.

10. **Select an Amendment Type.**

11. **Select a Reason.**

12. **Click Save.**

13. **Click the Transaction Limits tab.** The Transaction Limits page displays.

14. **Click + in the Billing Limits section.** A new row displays.

15. **Select the Transaction Identifier.** The Description field defaults once you select a Transaction Identifier.

16. **Type the Limit Amount.**

17. **Click Save.**

18. **Click the Contract Amendments tab.** The Contracts Amendments page displays.

19. **Click** Detail **for the line with the Amendment Status of Pending.** The Amendment Details page displays.

20. **Change the Amendment Status to Ready.** The page refreshes with the Process Amendment button.

21. **Click Process Amendment.** The Amend Status changes to Complete.

22. **Follow steps 1 – 25 in the change contract terms section. If you change the transaction limits, you will have to change the contract terms.**

The procedure is complete. Please call the Help Desk if you have problems with this procedure.