

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. Example:
[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.

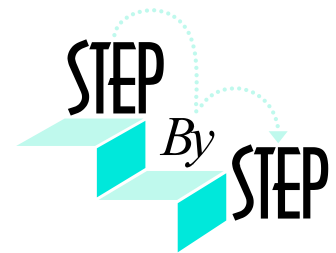
Find an Existing Value | **Add a New Value**

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.

General | **Lines** | **Amendments**

Contract Number: DOT_FHWA. **Sold To Customer:** Federal Highway Administration (FHWA)
Amendment Number: 0000000000 ***Contract Status:** ACTIVE

Amend Contract Add to My Contracts

Description: DOT FHWA **Processing Status:** Active
Contract Admin: Federal Receivables & Reimburseme **Amendment Status:** Complete
Region Code: **Business Unit:** Dept. of Transportation
Contract Type: FHWA-CON **Contract Classification:** Government
Currency Code: USD **Start Date:** 01/31/2006
Exchange Rate Type: CRRNT **End Date:** 12/31/2010
Contract Signed: 04/18/2007 **Last Update Date/Time:** 04/18/2007 12:53:19PM
Last Update User ID: COREMorriNL

▶ Other Information
 ▶ Summary of Amounts

Go To: [Billing Plans](#) [Revenue Plans](#) [Milestones](#) More

[Return to My Contracts](#)

Save Return to Search Notify Add Update/Display

[General](#) | [Lines](#) | [Amendments](#)

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]*

General | **Lines** | **Amendments**

Contract Number: DOT_FHWA. **Sold To Customer:** Federal Highway Administration (FHWA)
Pending Amendment: 0000000001 **Contract Status:** ACTIVE

View Current

Amendments Customize | Find | View All | Print | 1-2 of 2 | Close

Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Review notes
0000000000			04/18/2007	Complete	Detail	Review notes
0000000001	Error	Data Entry Error	04/20/2007	Pending	Detail	Review notes

Go To: [Billing Plans](#) [Revenue Plans](#) [Milestones](#) [Amount Allocation](#) More

[Return to My Contracts](#)

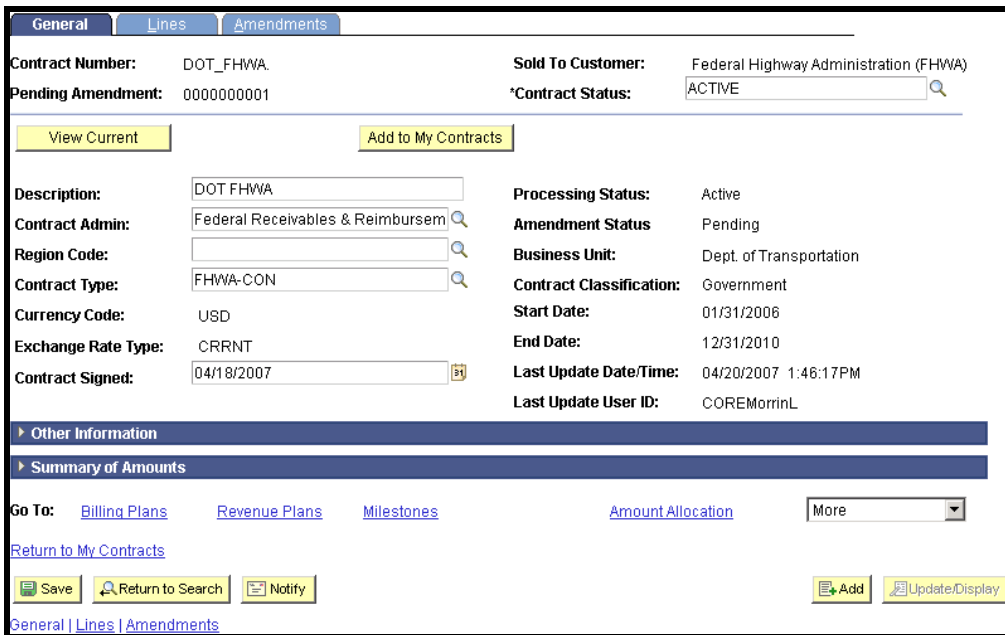
Save Return to Search Notify Add Update/Display

[General](#) | [Lines](#) | [Amendments](#)

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 .

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



The screenshot shows the 'General' tab of a contract management interface. At the top, there are tabs for 'General', 'Lines', and 'Amendments'. The 'General' tab is active. The page displays contract information for 'DOT_FHWA'. Key fields include: Contract Number (DOT_FHWA), Pending Amendment (000000001), Sold To Customer (Federal Highway Administration (FHWA)), and Contract Status (ACTIVE). Below this, there are buttons for 'View Current' and 'Add to My Contracts'. The main section contains two columns of fields: Description (DOT FHWA), Contract Admin (Federal Receivables & Reimburse), Region Code, Contract Type (FHWA-CON), Currency Code (USD), Exchange Rate Type (CRRNT), Contract Signed (04/18/2007), Processing Status (Active), Amendment Status (Pending), Business Unit (Dept. of Transportation), Contract Classification (Government), Start Date (01/31/2006), End Date (12/31/2010), Last Update Date/Time (04/20/2007 1:46:17PM), and Last Update User ID (COREMorriL). Below the fields are sections for 'Other Information' and 'Summary of Amounts'. At the bottom, there are navigation links for 'Billing Plans', 'Revenue Plans', 'Milestones', and 'Amount Allocation', along with buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'.

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

11. Click .

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

General | Lines | **Amendments**

Contract Number: DOT_FHWA **Sold To Customer:** Federal Highway Administration (FHWA)
Pending Amendment: 0000000001 **Contract Status:** ACTIVE

[View Current](#)

Amendments Customize | Find | View All | First | 1-2 of 2 | Last

General | Statistics | Amended Amounts | Misc.

Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Review notes
0000000000			04/18/2007	Complete	Detail	Review notes
0000000001	Error	Data Entry Error	04/20/2007	Pending	Detail	Review notes

Go To: [Billing Plans](#) [Revenue Plans](#) [Milestones](#) [Amount Allocation](#) More

[Return to My Contracts](#)

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)

[General](#) | [Lines](#) | [Amendments](#)

13. Click [Detail](#) for the Amendment row. This is the row with the Amendment Status of Pending. The Amendment Details page displays.

Amendment Details

Contract: DOT_FHWA **Amendment Number:** 0000000001

[Process Amendment](#)

Amendment Type: Error **Negotiated Amount:** 0.00 ***Amend Status:** Ready

Amendment Reason: Data Entry Error **Cancelled Negotiated Amount:** **Net Change:** 0.00

Process Date: 04/20/2007 **Discount / Surcharge:** 0.00

Allocation: *Allocation Not Complete **Cancelled Discount Amount:**

Reference ID: **User Ref #1:** **User Ref #2:**

Amendment Components Customize | Find | View All | First | 1 of 1 | Last

Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1					

[Internal Notes](#)

[Return to General Information](#)

[Save](#) [Return to Search](#) [Notify](#)

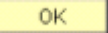
14. Change the Amend Status to Ready. The page refreshes with the Process Amendment button.

15. Click [Process Amendment](#). The Amend Status changes to Complete.

Warning -- Validating amendment with current contract. (9853,57)

Any changes are due to synchronizing current values with the amendment's 'Old Value'. The amendment detail grid has refreshed values.

[OK](#) [Cancel](#)

16. You may get this message when amending the contract. Click  .
17. The Amend Status changes from Ready to Complete.

Amendment Details

Contract: DOT_FHWA.	Amendment Number: 0000000001	Amendment Completed On: 04/20/2007 2:12PM
Amendment Type: Error	Negotiated Amount: 0.00	Amend Status: Complete
Amendment Reason: Data Entry Error	Cancelled Negotiated Amount:	Net Change 0.00
Process Date: 04/20/2007	Discount / Surcharge: 0.00	
Allocation: *Allocation Not Complete	Cancelled Discount Amount:	

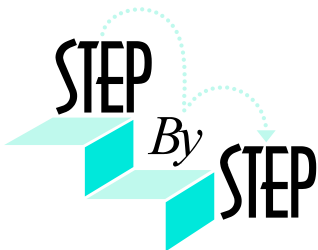
Reference ID: User Ref #1: User Ref #2:

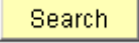
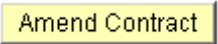

Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1					




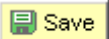
[Internal Notes](#)

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

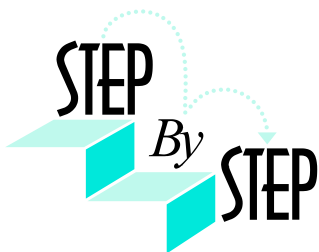
If you need to add a new contract line, use the procedure below.

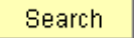
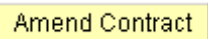





1. Navigate to *Customer Contracts > Create and Amend > General Information.*
2. On the Find an Existing Value tab, verify that the Business Unit is correct.
3. Type the contract name in the Contract field.
4. Click  . The General page displays.
5. Click the Lines tab. The Lines page displays.
6. Click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

11. Click . The General Information – Add Contract Lines page displays.
12. **Type your three letter agency acronym in the Product field.**
13. Click . The search results display.
14. **Select the checkbox for the product you want to add to the contract.**
15. Click . 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 .
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.**

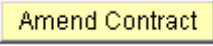

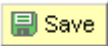
If you need to change contract terms, use the procedure below.



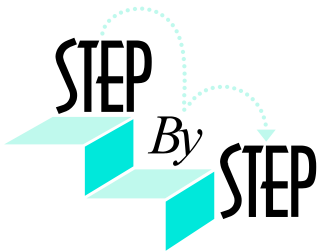
1. Navigate to *Customer Contracts > Create and Amend > General Information*.
2. On the Find an Existing Value tab, verify that the Business Unit is correct.
3. Type the contract name in the Contract field.
4. Click . The General page displays.
5. Click the Lines tab. The Lines page displays.
6. Click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



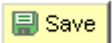

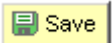
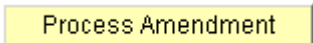
14. **Type the Billing Limit.**
15. **Type the Effective Date.**
16. **Ensure the Status is Active.**
17. **Ensure the Rate Selection is Rate Set.**
18. **Select or type Rate Set.**
19. **Select or type a Project.**
20. **Select or type an Activity.**
21. **Click .**
22. **Click the Contract Amendments 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 .** 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 .** The Contract Amendments page displays.
3. **Select an Amendment Type.**
4. **Select a Reason.**
5. **Click .**
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 .**

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 . 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 . The Amendments page displays.
10. Select an Amendment Type.
11. Select a Reason.
12. Click .
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 .
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 . 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.