

## 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]*

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Favorites | Main Menu > Customer Contracts > Create and Amend > General Information

### 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

Search Criteria

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]

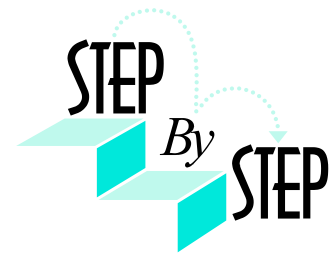
Master Contract #: [begins with]

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

No matching values were found.

Find an Existing Value | Add a New Value



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

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Favorites | Main Menu > Customer Contracts > Create and Amend > General Information New

General | Lines | Amendments

Contract Number:	CT-03-0097	Sold To Customer:	Federal Transit Administration (FTA)
Amendment Number:	0000000003	*Contract Status:	FINAL BILL SUBMITTED

**Amend Contract** Add to My Contracts

Description:	Norwich - Transportation Cente	Processing Status:	Active
Contract Admin:	Federal Receivables & Reimbursem	Amendment Status:	Complete
Region Code:		Business Unit:	Dept. of Transportation
Contract Type:	FTA	Contract Classification:	Government
Currency Code:	USD	Last Amended:	06/03/2011
Exchange Rate Type:	CRRNT	Start Date:	09/30/1997
Contract Signed:	09/30/1997	End Date:	09/30/2017
		Last Update Date/Time:	01/26/2012 11:14:36AM
		Last Update User ID:	CarpeningL

Other Information

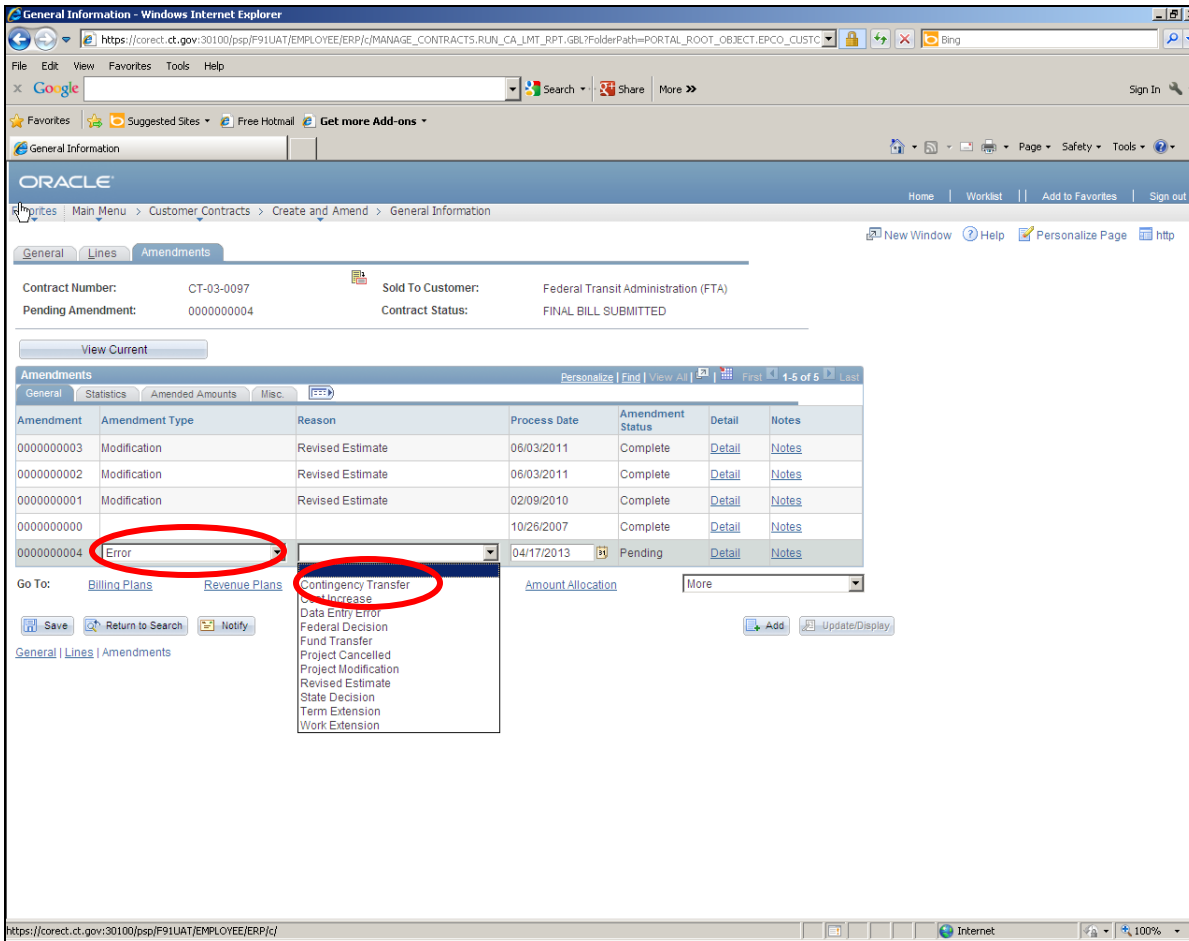
Summary of Amounts

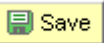
Go To: [Billing Plans](#) [Revenue Plans](#) [Milestones](#) More

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]*



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.

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Favorites | Main Menu > Customer Contracts > Create and Amend > General Information

General | Lines | Amendments

Contract Number: CT-03-0097 Sold To Customer: Federal Transit Administration (FTA)  
 Pending Amendment: 0000000004 \*Contract Status: FINAL BILL SUBMITTED

View Current Add to My Contracts

Description: Norwich - Transportation Center Processing Status: Active  
 Contract Admin: Federal Receivables & Reimbursam Amendment Status: Complete  
 Region Code: Business Unit: Dept. of Transportation  
 Contract Type: FTA Contract Classification: Government  
 Currency Code: USD Last Amended: 06/03/2011  
 Exchange Rate Type: CRRNT Start Date: 09/30/1997  
 Contract Signed: 09/30/1997 End Date: 09/30/2017  
 Last Update Date/Time: 01/26/2012 11:14:36AM  
 Last Update User ID: CarpeningL

Other Information

Summary of Amounts

Go To: Billing Plans Revenue Plans Milestones Amount Allocation More

Save Return to Search Notify Add Update/Display

General | Lines | Amendments

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

11. Click .

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

ORACLE

Favorites | Main Menu > Customer Contracts > Create and Amend > General Information

General | Lines | Amendments

Contract Number: CT-03-0097 Sold To Customer: Federal Transit Administration (FTA)  
 Pending Amendment: 0000000004 Contract Status: FINAL BILL SUBMITTED

View Current

Amendments Personalize | Find | View All | First 1-5 of 5 Last

Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes
0000000003	Modification	Revised Estimate	06/03/2011	Complete	<a href="#">Detail</a>	<a href="#">Notes</a>
0000000002	Modification	Revised Estimate	06/03/2011	Complete	<a href="#">Detail</a>	<a href="#">Notes</a>
0000000001	Modification	Revised Estimate	02/09/2010	Complete	<a href="#">Detail</a>	<a href="#">Notes</a>
0000000000			10/26/2007	Complete	<a href="#">Detail</a>	<a href="#">Notes</a>
0000000004	Error	Data Entry Error	04/17/2013	Pending	<a href="#">Detail</a>	<a href="#">Notes</a>

Go To: Billing Plans Revenue Plans Milestones Amount Allocation More

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.

Home | WORKS  
 Favorites | Main Menu > Customer Contracts > Create and Amend > General Information  
 New Window ? Hel

### Amendment Details

Contract: CT-03-0097      Amendment Number: 0000000004

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Amendment Type:       Negotiated Amount:       \*Amend Status:

Amendment Reason:       Cancelled Negotiated Amount:       Net Change:

\*Process Date:       Discount / Surcharge:

Allocation: Allocation Not Complete      Cancelled Discount Amount:

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

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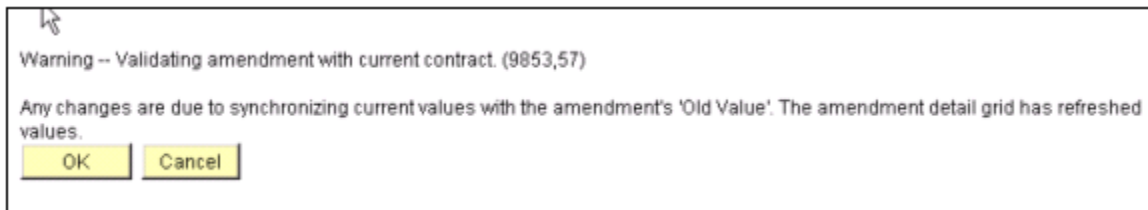
Amendment Components

Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1 Contract Header		Region	Update		01

[Amendment Amount Allocation](#)      [Internal Notes](#)  
[Return to General Information](#)

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



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

ORACLE

Favorites | Main Menu > Customer Contracts > Create and Amend > General Information

Home | Wor

New Window ?

### Amendment Details

Contract: CT-03-0097      Amendment Number: 000000004      Amendment Completed On: 04/17/2013 11:52AM

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Amendment Type: Error      Negotiated Amount: 0.00      Amend Status: Complete

Amendment Reason: Data Entry Error      Cancelled Negotiated Amount: 

Net Change
0.00

Process Date: 04/17/2013      Discount / Surcharge: 0.00

Allocation: Allocation Not Complete      Cancelled Discount Amount:

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

#### Amendment Components

Personalize | Find | View All | First 1 of 1 Last

Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1 Contract Header		Region	Update		01

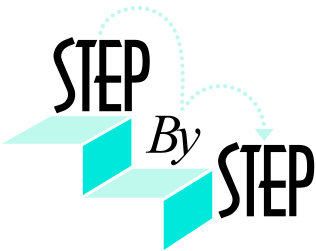
[Internal Notes](#)

[Return to General Information](#)


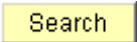
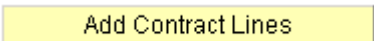
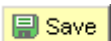
Save    Return to Search    Notify

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

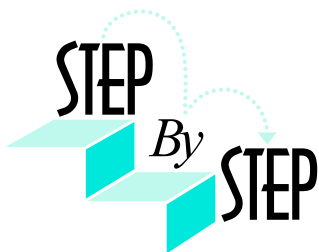
If you need to add a new contract line, use the procedure below.

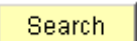
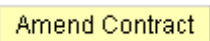
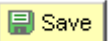




1. Navigate to *Customer Contracts > Create and Amend > General Information*.
2. On the Find an Existing Value tab, verify that the Business Unit is correct.
3. Type the contract name in the Contract field.
4. Click **Search**. The General page displays.
5. Click the **Lines** tab. The Lines page displays.
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 . 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.**

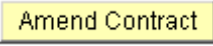

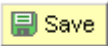
If you need to change contract terms, use the procedure below.



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.

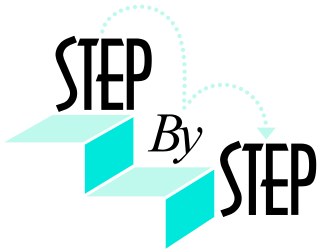
14. **Type the Billing Limit.**
15. **Type the Effective Date.**
16. **Ensure the Status is Active.**
17. **Ensure the Rate Selection is Rate Set.**
18. **Select or type Rate Set.**
19. **Select or type a Project.**
20. **Select or type an Activity.**
21. **Click .**
22. **Click the Contract Amendments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

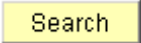

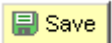

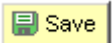
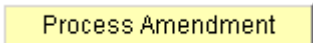
**If this is a Government Contract, follow the steps below. Otherwise, go to the transaction limits on a contract section below.**

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.