5.1 PSA – Adding Amendments

Background:

In order to enter amendments the contract must be active.

Roles:

PSA User

Navigation:

Contract Administration Overview > Contract

1. From the Contract Administration Summary select the **Contract Progress** quick link at the top of the screen
2. Select the **Change Orders** tab, and click the **Add** button.
3. In the General tab, toggle the **Change Order Type** to *PSA – Professional Services Agreement.*
4. Enter the **Assigned Change Order Number**, (Amendment Number) and **Summary of Changes(s)** (language from the amendment).
5. Click **Save**.

Increase/Decrease Items (if you are modifying the $$ for a task previously added to the contract)

6. Press **Select Items** and from the modal find and select the item you will be modifying and press **Add to Change Order**
7. In the **Quantity** field enter the change of dollar value the amendment changes the item (use a negative if you are decreasing the item)
8. Press **Save**.

Adding a Project

If there is an additional Program Code for any of the new tasks, a new Project must be added to the contract. This will be common practice with term agreements.

Contract Administration > Contract

9. From the Contract Administration Summary click the **Project** Quick Link
10. Select the **Component Actions Menu** and click the **Add** Action
11. Enter the new program number in the **Project ID** field. If you are adding a Program number that will be used on a capital project ensure to populate PSA at the end of it (i.e. Z839640000PSA).
12. Toggle the **Project Item List** to *80 – PSA* and the **Unit System** to *English*
13. Enter the Project Name in the **Project Description** field
14. If appliable populate the **Federal Project Number** and/or **State Project Number** field
15. Toggle the **Project Type** to *13 - PSA* and click **Save**
16. Select the **Categories** tab and click the **New** button
17. Enter 00BB in the **Category ID** Field
18. Enter Basic Bid in the **Category Description** field and press **Save**.

New Items (If you are adding new tasks)

19. Click the **Select New Item** button to open a modal window.

5.1 PSA – Adding Amendments

20. In the Select New Item window, press enter in the **Reference Item** autocomplete to see all available PSA items. Select the correct item based on the scope of the amendment.
21. Select the correct **Project** (program number).
22. Click the **Add to Change Order** button at the bottom of the modal window.
23. Enter the **Quantity** (use the total dollar amount), **Funding**, **Unit Price** (enter 1), **Supplemental Description** (this is required and should be task specific information i.e. Task 5 - Risk Management), and **Contractor** (optional) for the new item.

Time Adjustments

24. Click the **Select Contract Time** button to open a modal window.
25. Click **Show first 10** to display all contract times and select the **Completion Date**.
26. Click the **Add Time Adjustments to Change Order** button at the bottom of the modal window.
27. Enter the **Adjusted Completion Date** for the contract time.
28. Click **Save**.

Submitting & Approving Change Order

1. Prior to submitting for approval, ensure that the Amendment has been entered correctly, and that all tasks and dollar values are correct.
2. On the Contract Change Order Summary, click the **Component Actions Menu** in the upper right corner in the Tasks section, **select Submit For Approval**. The system will change the Status of your Change Order to Pending Approval.

3. Review the Change Order once more to ensure the information has been entered correctly.
4. On the Contract Change Order Summary, click the **Component Actions Menu** in the upper right corner in the Tasks section, click **Approve** to open a modal window, or **Change to Draft** if you need to make a correction.
5. In the Approve modal window enter the date the Amendment was physically signed as the **Signed Date**.
6. Click **Save**.

Next Steps:

To add more Amendments repeat this QRG.

To close the contract see the QRG: *5.2 PSA – Close Contract*