Contract Modification Creation

What are Contract Modifications?

ePM records contract modifications are issued against contracts whenever necessary due to a change in the contracts requirements, a scheduling conflict, a problem of materials availability, or some other factor. An ePM modification contains several date and currency information boxes that enable you to specify and gauge the impact of the modification on the contract in time and monetary terms. These information boxes are ‘smart’ in that they always reflect the impact of other modifications against the contract. The recording of a modification in ePM is the final step of an overall change management process that may involve other documents in ePM such as a Potential Change Order. Use contract modifications for logging in-progress and actual modifications. Prior to approving a modification in ePM the detailed schedule of values must be included. Attach a scanned copy of the executed contract modification to the ePM contract modification document.

Who Will Use This?

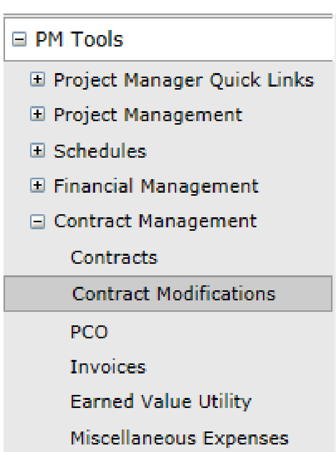
√ Construction Manager

√ Project Manager

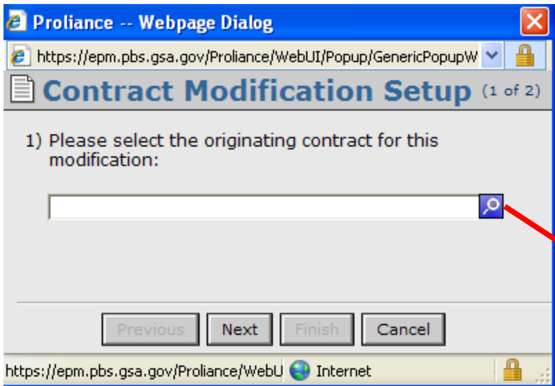
Steps to Create a Contract Modification

1. Log into ePM as a user with the Modification Creator security role, and then navigate to the appropriate project.

2. Navigate to Applications > Contract Management > Contract Modifications.



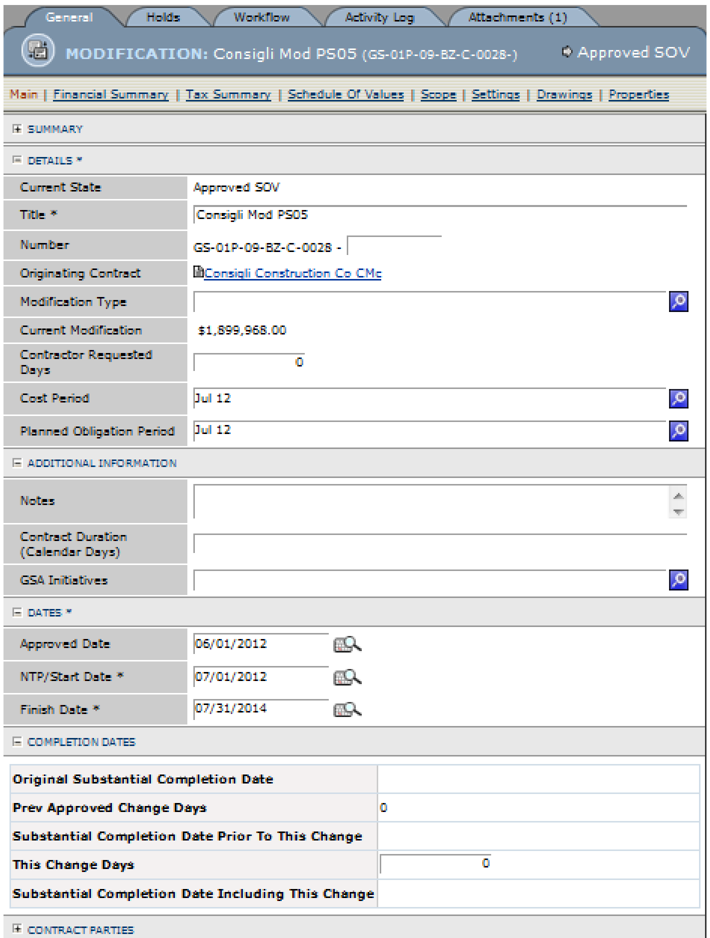
3. Click the '**New**' button. A two-step wizard launches. First, select the Contract to which this modification will relate. Then click '**Next**'.



4. Once you **Add** the correct contract, click **OK**, and then **Finish.** A blank Modification document appears.

ePM Quick Reference Guide #022

5. On the **Main** page, fill in the fields in the **Details** and **Dates** sections. Other sections can record various details of the modification.

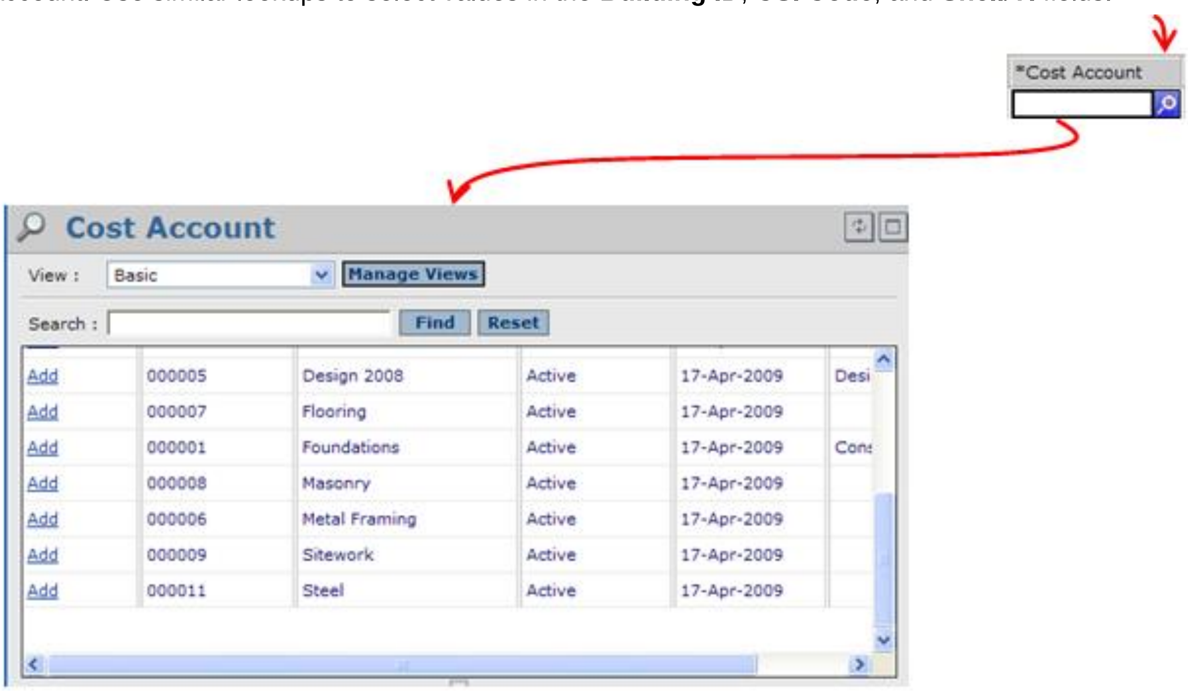


Notes:

- Enter the Title as a required field: Vendor-Contractor Type-Type of Services-Phase (James G Davis-GC-Increase Project Scope-Phase 1)
- The parent Originating Contract is auto populated with a hyphen. Enter a Modification Number. Or, leave it blank and it will auto number this field
- Enter the Cost and Planned Obligation Periods
- Enter the required Notice To Proceed (NTP/Start Date) and Finish Date (Finish Date is the project's substantial completion date unless otherwise noted in the mod.)
- Enter the "This Change Days" if foreseen the Modification will extend the Contract Finish Date
- The Modification has inherited the Contract Parties data from the parent Originating Contract

6. Click on the Schedule of Values (SOV) page.
   Each SOV line item must have a corresponding **Cost Account Allocation**

On the SOV Line, enter just a **Description** and **Scheduled Amount**. On the **Cost Account Allocation** line, enter an **Item Description**, then using the drop down icon, select a Cost Account. Use similar lookups to select values in the **Building ID**, **CSI Code**, and **Shell/TI** fields.



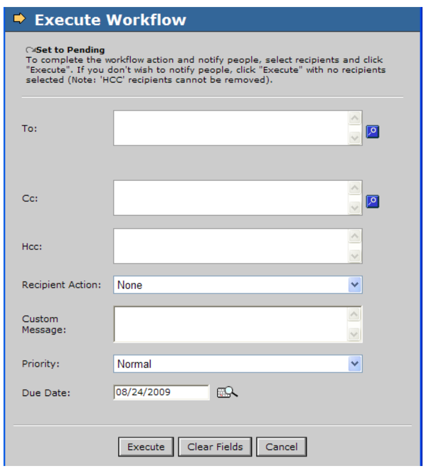
Notes:

- The **Schedule of Values** on the Modification is inherited by the invoice. Therefore, the level of detail needed for invoicing must be known prior to approval of the Modification.
- The **Schedule of Values Line Number** can be 1, 2, 3, etc. - or it can correspond to a task ID on the project schedule.

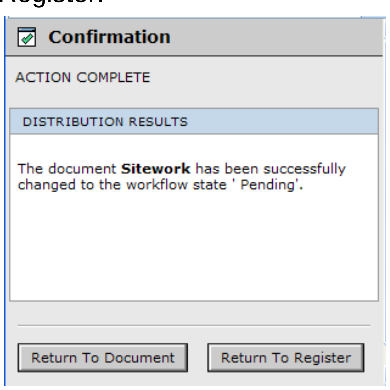
7. On the **Scope** page, enter any applicable notes in the **Notes** field.

Execute Workflow to set the Modification to Pending:

8. Click the yellow workflow button labeled '**Set to Pending'**, found at the top of the screen. An 'Execute Workflow' dialog box appears, showing who will receive a notice to approve (the '**To'** box), who will be copied (the '**Cc'** box), what action the recipient should take, the message the recipient will see when notified, the priority of this process, and the date the subsequent action is due. These fields are editable- additional users can be notified or copied, the custom message, priority and due date can be changed.

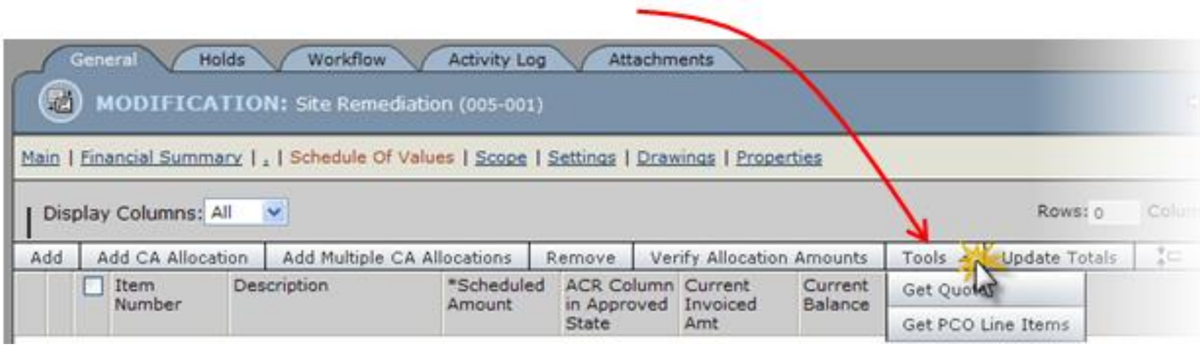


9. Click '**Execute'**. If successful, ePM displays a confirmation message showing who has received a notification. You now have the choice of returning to the Modification Document or to the Register.



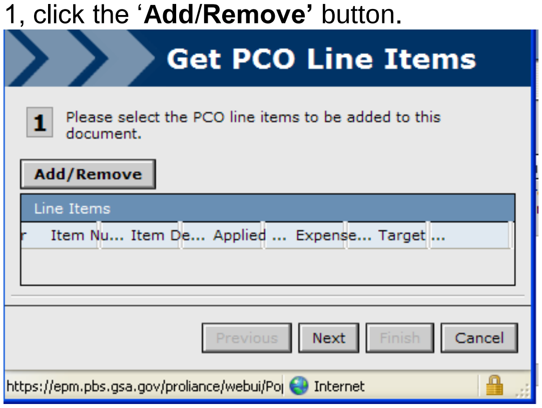
Note: Another way to add Schedule of Values line items is to pull them from existing **Potential Change Orders**. To do this, first complete steps 1 through 5 above (do not add any schedule of values line items), and then execute workflow to set the modification to '**Pending'**.

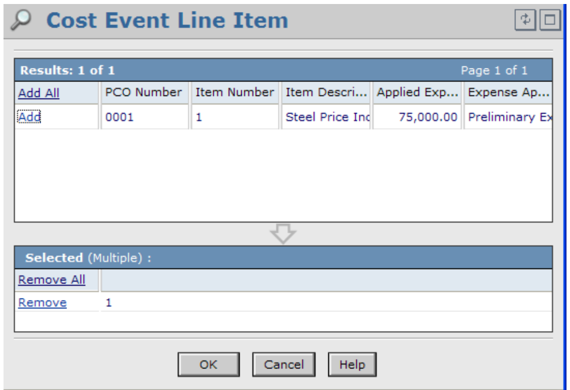
1. With the modification set to '**Pending'**, click on the **Schedule of Values** page. Then click the '**Tools'** button and select '**Get PCO Line Items'**



Click '**OK'** when prompted to save your document.

2. A wizard launches that will guide you through selection of Potential Change Order items. In step 1, click the '**Add**/**Remove'** button.

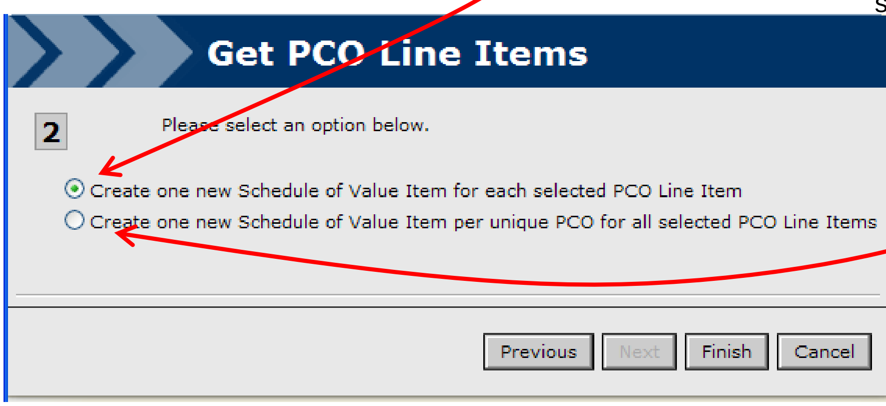




This displays a list of Potential Change Order items available for inclusion in your Contract Modification. Select one or more, and then click 'OK'.

3. ePM displays step 1 of the wizard again, this time with the PCO line items that will be included in the Mod. Click '**Next'**.

4. In Step 2 of the wizard, choose whether the Contract Modification will have separate line items for each of the PCO line items imported or combine all the PCO lines items into a single line item on the Contract Mod.



Click '**Finish'**

5. ePM auto-creates line items on the Schedule of Values page of the Contract Modification document (including Cost Account Allocation lines).

IMPORTANT: For more instructions about workflow processes, approving a Modification Document, and Adjudicating a Modification Document, please refer to the Quick Reference Guide titled "*Approving a Contract Modification Document*".

Tips

√ Required fields are marked with an asterisk.

√ Use the ‘Forward’ button if collaboration required from other users.

√ Values on the **Financial Summary and Settings** pages are read only.

√ Click on the **Activity Log** tab to view the audit trail of the document.

√ Clicking the online help button provides generic help related to contract modifications, NOT for the specific uses of GSA’s contract modification documents.

√ Click on the **Financial Summary** page throughout the workflow process to view the assignment of contract dollars to various ACR columns.

√ To expand or collapse sections in a document, click on the double headed arrow buttons:

√ Notices with yellow icons require action; blue means a document was forwarded; white means you were cc’d.

√ For additional help and support, contact your GSA Regional Point of Contact