

CONSULTANT CONTRACT AMENDMENT

The Amendment Screen provides a mechanism to amend consultant contracts by adjusting existing line items or by creating new ones. In addition, the Amendment Screen supports the association of issues to the amendment, and subsequently to the consultant contract.

KEY CONCEPTS

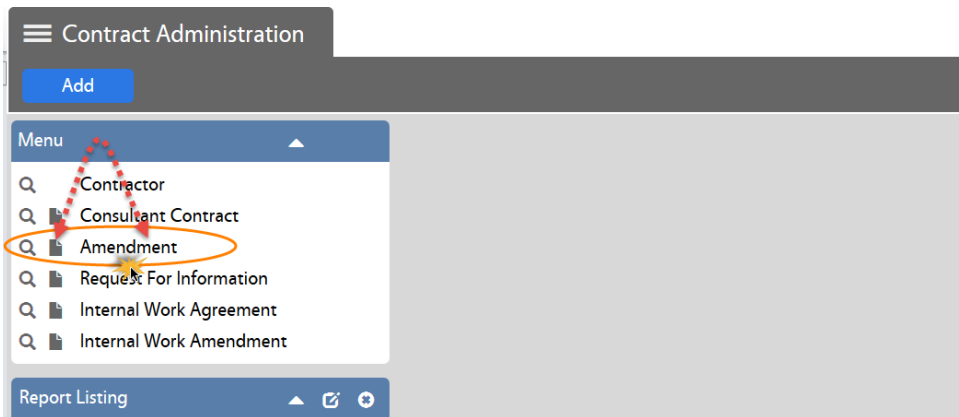
- Users can submit changes to consultant contracts by either adding a line to the contract or adjustment of an existing line item.
- Issues associated to amendments auto populate cost fields on the Amendment Screen line items.
- Saving an amendment in a REQUESTED status increases anticipated cost to the capital project. Saving the amendment in an APPROVED status increases the committed cost for that capital project and reduces the anticipated cost.
- The Amendment Screen supports searches against the Amendment Total field.


The **UPL / COORDINATOR** will initiate new agreements.

In order to create a new agreement, please follow these steps:

1. From the Contract Administration window, select the Amendment menu option.

You may click on the  icon or on "Amendment"



- ➔ Amendment → Click on **New** → Search Consultant Contract to amend
- ➔  → Search Consultant Contract to be adjusted

2. REQUESTED Status

Enter the following information:

1. Amendment Number
2. Description - field can accommodate up to 255 characters only.

Use the Description field to include the information on the amendment changes

→ If the description of the amendment changes is too long to fit in the above field, then please use the “**Notes Log**” (which provides a larger field) and select the pertinent **Note Type** (OA Amendment or CM Amendment).

Note Type	
Note Type ↓	Description
CM AMENDMENT	CM Amendment Change
OA AMENDMENT	OA Amendment Changes

BOTH Description field and Notes Log information will print on the amendment.

For reference only, you may use the Extra Description. The information in the extra description field will not print on the amendment.

3. Amendment Date
4. Contract Information – If this information is not auto-populated, type in the Contract # or search and select the contract to be adjusted.
5. User Defined Fields (UDFs) – Enter:
 - a. Contractor’s Proposal Date
 - b. Extension of Time
 - c. Category

User Defined Fields

Done Cancel

AMD001 Last Edited by JOSHUA CONRADSON On 07/30/2015 09:58 AM

AMD Test Amendment for OA Agreement # 1015

PSC Change Order *****

Contractor's Proposal Date Jul 07, 2015 01:15 PM

Extension of Time (# of Days)

PSC CO Category

Amendment

JOSHUA About Logc

Save Cancel

View

Extra Description

Workflow

Status History

Notes Log

User Defined Fields

Related Documents

1 **AMD001** Last Edited by JOSHUA CONRADSON On 07/30/2015 09:58 AM

2 AMD Test Amendment for OA Agreement # 1015

3 Status: REQUESTED

Amendment Date: Jul 30, 2015

Capital Project: 10-155 Hill Residence Halls - Building

Total Amount: \$0.00

Contractor: 902015402 Associated Mechanical

Address Code: 1

Contract: 4 1015 Testing OA Agreement for

Reference Number: PO#123

Original		Change	
Award	\$10,000.00	Award	\$10,000.00
Amendment	\$0.00	Amendment	\$0.00
Tax	\$0.00	Tax	\$0.00
Total	\$10,000.00	Total	\$10,000.00
Start		Start	
Expected End		Expected End	

Remove Add 6

Line Item

Line	Description	Contract Line	Component	Reason	Line Total
------	-------------	---------------	-----------	--------	------------

6. Line Item(s)

- a. Select if you are “adding” or “adjusting” a contract line

Amendment

Done Cancel

Please Select:

Add New Contract Line

Adjust Contract Line

Enter the following:

- b. Description
- c. Line Item (required field if you are adjusting a Contract Line), or Component Group (which is a required field if you are adding a New Contract Line.)
- d. Reason
- e. Amendment amount (enter amount without commas)
- f. Issue, if applicable

Line Item JOSHUA About Logou

Done Add Cancel AiM

View **002** Last Edited by JOSHUA CONRADSON On 07/30/2015 10:56 AM

Extra Description **B** AE BASIC FEE SUMMARY

Notes Log

Related Documents

Amendment AMD001
AMD Test Amendment for OA
Reason **D** TBD

New End Date

Capital Project 10-155 Hill Residence Halls - Building

Contract 1015 Testing OA Agreement for Project

Component Group

Line Group BASIC SVCS

Amendment **E** \$1,500.00

Tax 1

Tax 2

Tax Rebate

Line Total \$0.00

Component AE BASIC FEE SUMMARY

Line Item **C** 001

AE BASIC FEE SUMMARY

Issue **F**

Line Item

7. Click on **Done**, or **Add** if you need to enter another line item.

Amendment JOSHUA About Logou

Save Cancel AiM

Workflow

Status History

Notes Log

User Defined Fields

Related Documents

Capital Project 10-155 Hill Residence Halls - Building

Total Amount \$1,500.00

Contractor 902015402 Associated Mechanical

Address Code 1

Contract 1015 Testing OA Agreement for

Reference Number PO#123

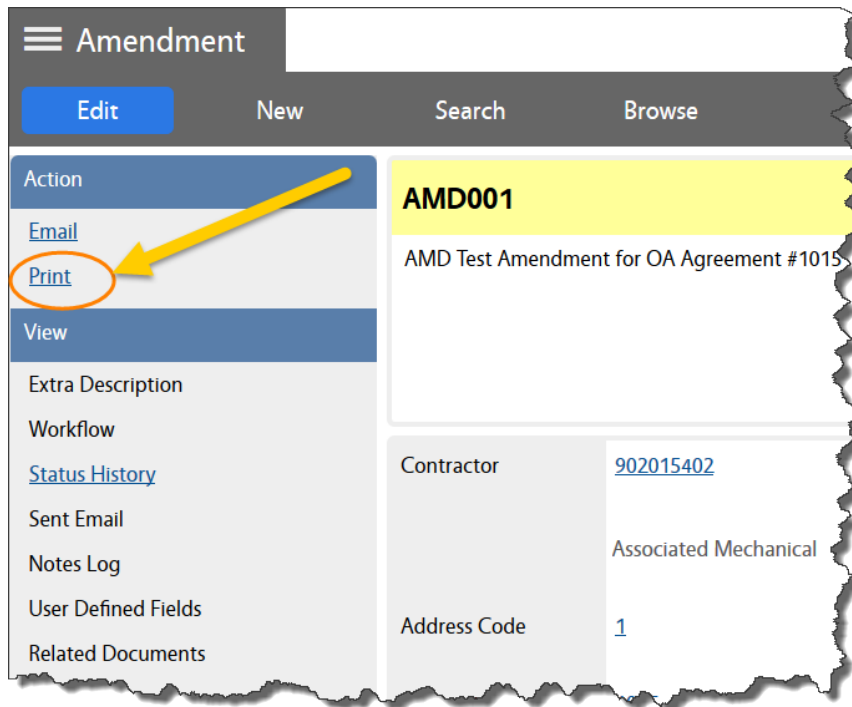
	Original	Change
Award	\$10,000.00	\$10,000.00
Amendment	\$0.00	\$1,500.00
Tax	\$0.00	\$0.00
Total	\$10,000.00	\$11,500.00
Start		
Expected End		

Remove Add

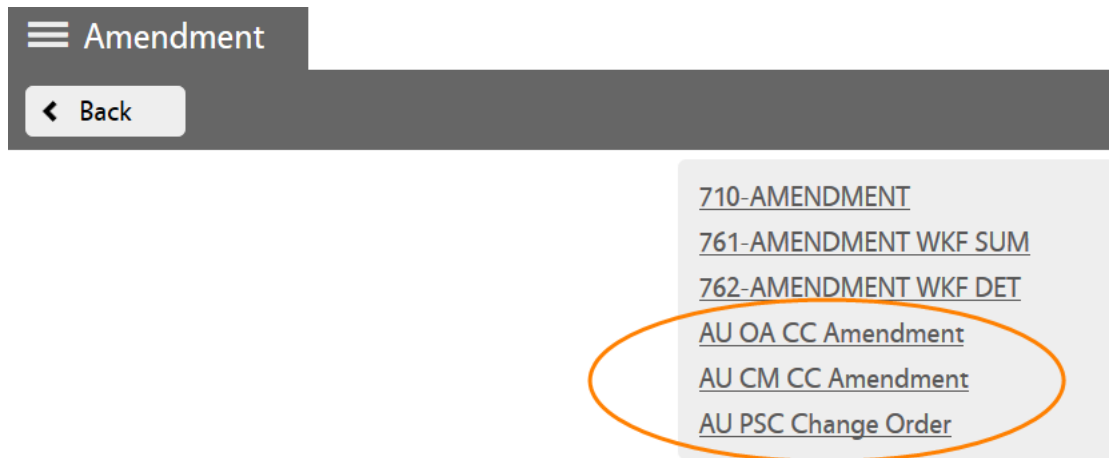
Line	Description	Contract Line	Component	Reason	Line Total
002	New Plans		AE CONSTRUCTION DOCUMENTS		\$1,500.00

8. Click on **Save**.

9. Print the AU Contract Amendment
a. Click on **Print**



b. Select the pertinent AU Amendment from the list of available reports.



The system will generate your report (normally on a new tab, depending on your web browser settings).

B.C. Project No: 10-155

ABC Form B-4
August 2001

Date: Jul 30, 2015, 12:00 AM

AMENDMENT No: AMD001

To

AGREEMENT BETWEEN OWNER AND ARCHITECT

For 10-155 AND Hill Residence Halls - Building Renovations & Upgrades, dated , by and between the State of Alabama, Auburn University, Auburn, Alabama, Owner(s) and Associated Mechanical Contractors Inc, 248 S. LEWIS
The following changes in the said agreement are made therein:

AMD Test Amendment for OA Agreement #1015

Original Group		Change Group	
Award:	\$26,350.00	Award:	\$26,350.00
Amendment:	\$0.00	Amendment:	\$2,500.00
Total:	\$26,350.00	Total:	\$28,850.00

Line Item					
Line	Description	Contract Line	Component	Reason	Line Total
001	AE BASIC FEE SUMMARY	001	AE BASIC FEE SUMMARY	CONVERT	\$1,500.00
002			CONSTRUCTION		\$1,000.00

The Owner(s) and the Architect agree to the terms of this Amendment as contained herein.

APPROVALS

CONTRACTING PARTIES

By _____

902015402 (Associated Mechanical Contractors Inc)

Architect

By _____

Signature of Officer of Firm

Name & Title _____

STATE OF ALABAMA BUILDING COMMISSION
(Not required for locally-funded SDE projects.)

Auburn University
Owner

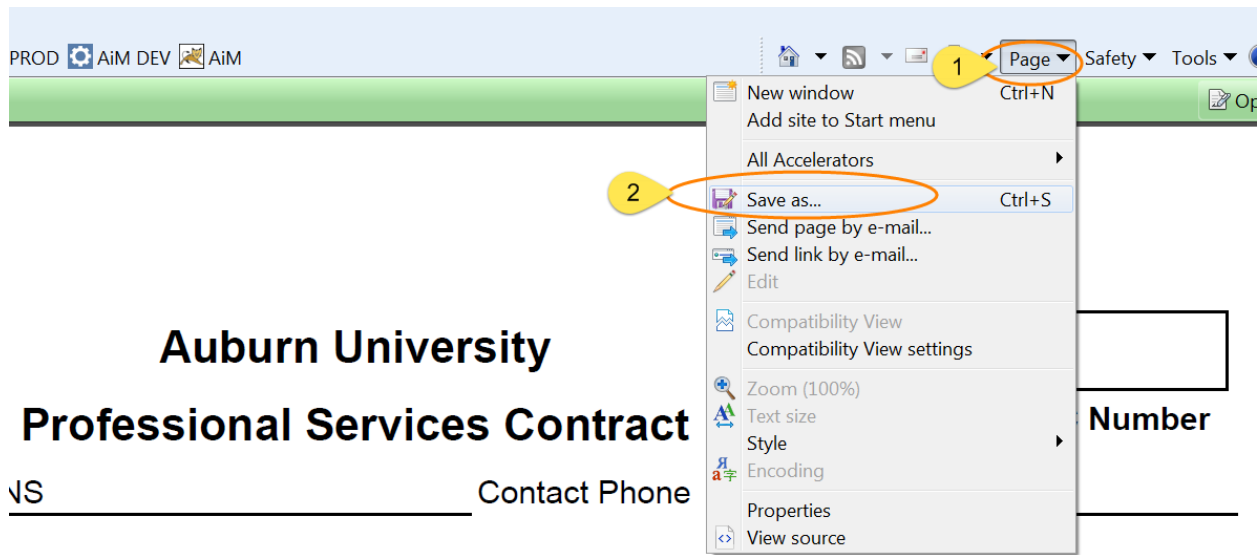
By _____
Director, Technical Staff

By _____
Name & Title Dr. G. Jay Gogue, President

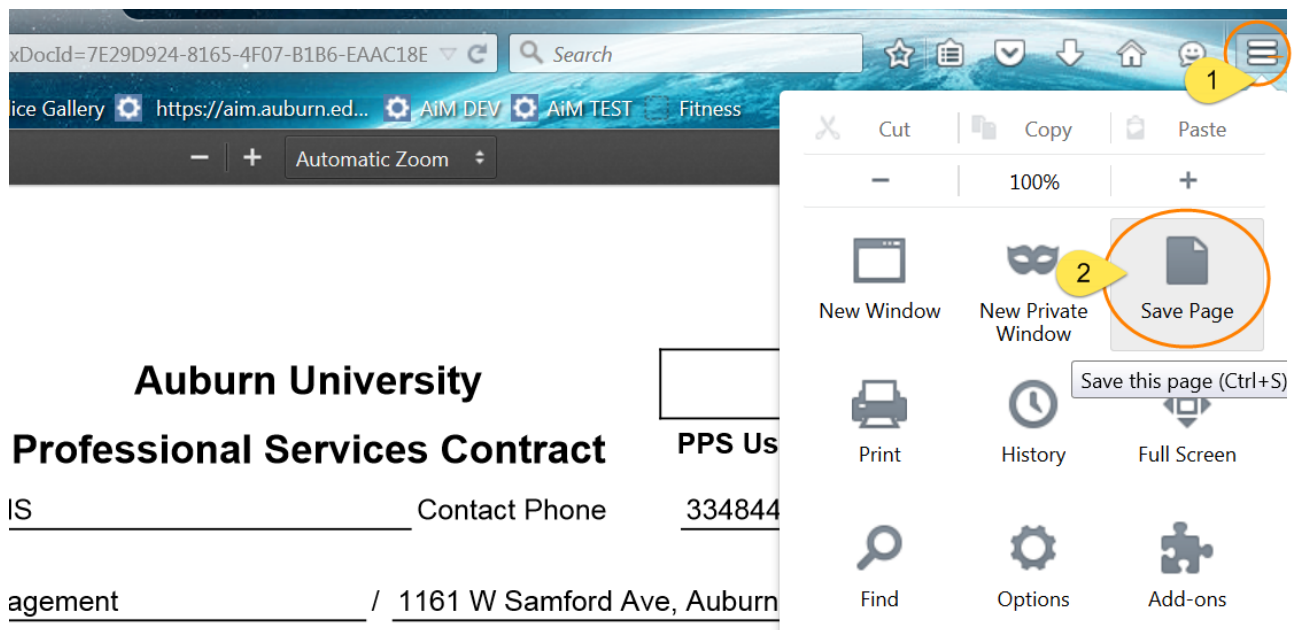
10. Save the amendment as a PDF file in the network folder with the related project documentation.

The steps to save the file may vary depending on your web browser. Here are two examples:

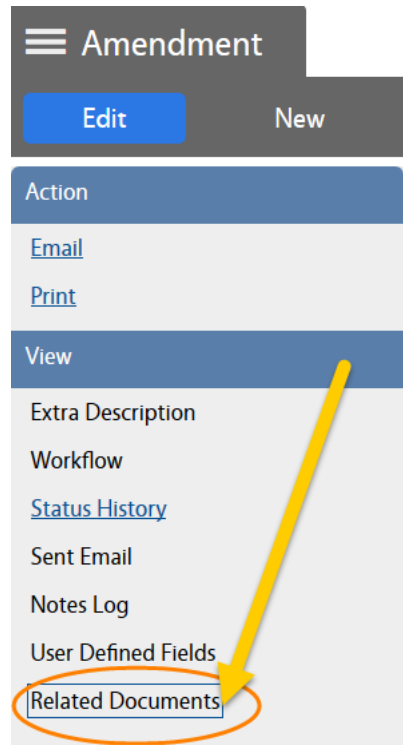
Explorer:



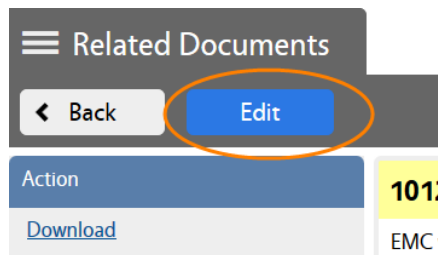
Mozilla Firefox:



11. Attach the Agreement PDF file as a "Related Document" to the AiM Amendment.
 - a. From the main Amendment screen, go to the "Related Documents" view:

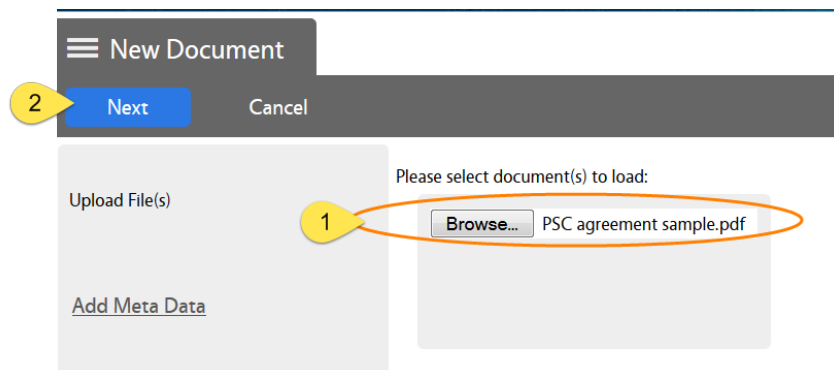


b. On the Related Documents view, click on **Edit**



c. Click on **Add**

d. Browse the amendment PDF file and click on **Next**



e. Enter the Document Type. For example "Amendment to OA":

New Document

Next Cancel

Upload File(s)

Add Meta Data

Add Attributes

Title: Amendment # 123

Type: AMENDMENT to OA

Tags:

- f. Click on **Next** three times to bypass meta data, attributes, and permissions options.
- g. Click on **Save** on the Related Documents screen.

Related Documents ROCIO About Logou

Save Cancel AIM

1015 Last Edited by ROCIO EVANS On 08/03/2015 02:26 PM

AMD Test Amendment for OA Agreement #1015

Document Listing Attach Link Remove Add

Thumbnail	Title	Current Version	Document Type	Extra Description	Related On
Click to view	Amendment # 123	1.0	AMENDMENT to OA		Aug 03, 2015

- h. Click on **Back** (or on Edit if you want to revise anything).

Related Documents

Back Edit

Action

[Download](#)

12. Click on **Edit**

2. Decide which Amendment Process to follow:
 - If PSC, change status to **PSC AMENDMENT RTE**
 - (For OUA route: use **PSC AMENDMENT**)
 - If OA, change status to **OA AMENDMENT RTE**
 - (For OUA route: use **OA AMENDMENT**)
 - If CM, change status to **CM AGREEMENT**
 - If PSPO, change status to **PSPO AMENDMENT ROUTE**

3. Click on **SAVE**.