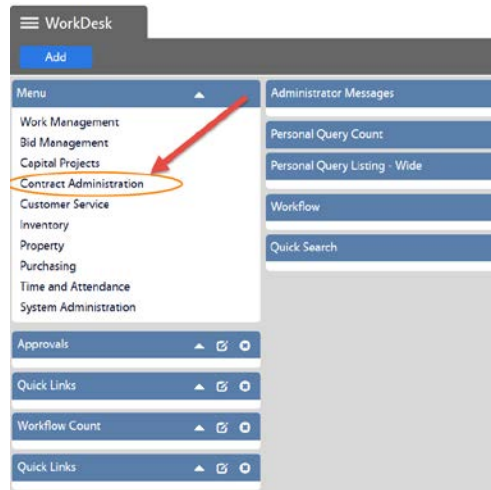


CONSULTANT CONTRACT: PSC AGREEMENT

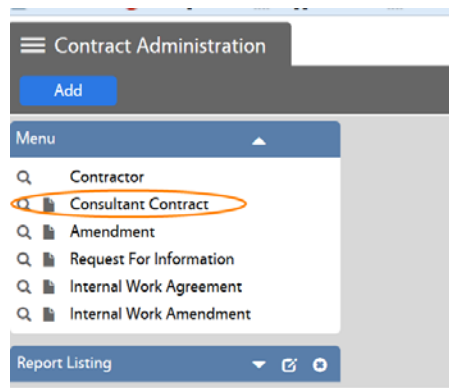
The **UPL / COORDINATOR** will initiate new agreements.

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

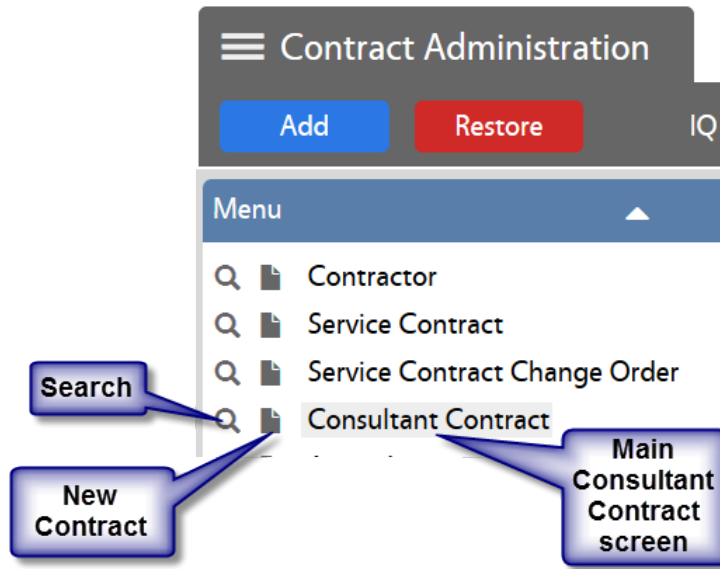
1. Log into the AiM system, and go to the **Contract Administration** screen from the main Menu.



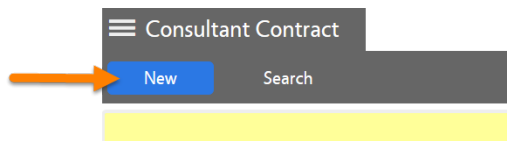
2. Select the **Consultant Contract** menu option.



NOTE: From this screen you can Search, create a New Contract, or open the Contract main screen:



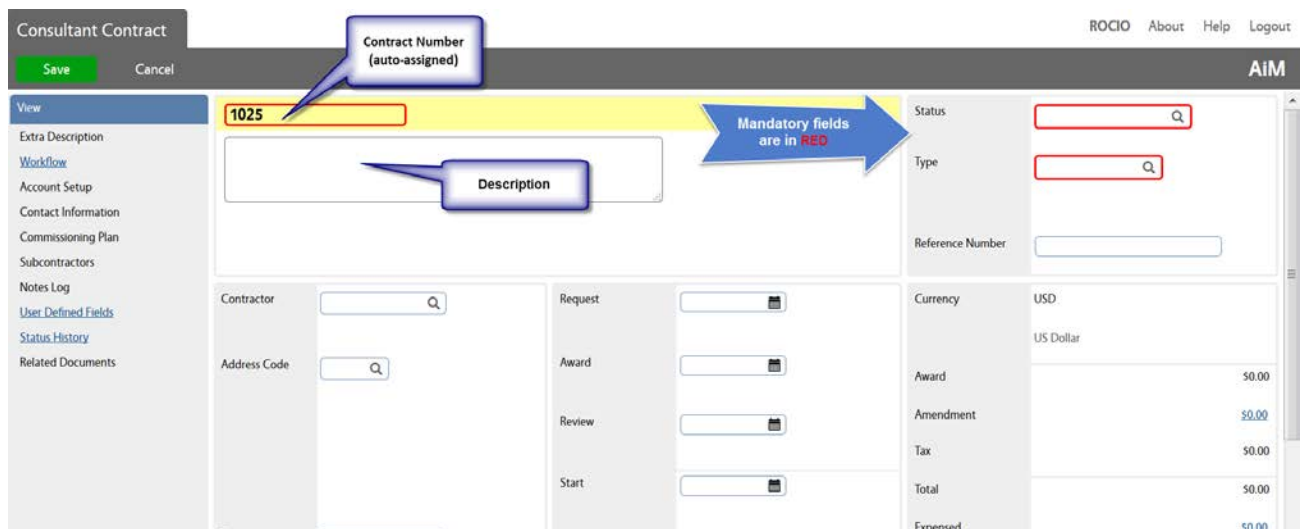
3. Click on the “New” option on the Consultant Contract screen:





REQUESTED Workflow Status

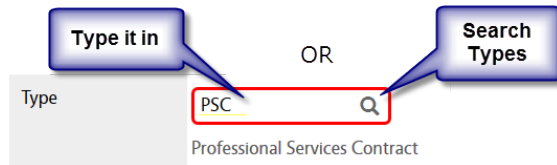
4. Enter the following information:


1. Description – Enter contract name and brief description. (This field contains 255 characters only.)
2. The scope of the project should be entered into the “Extra Description” view.





NOTE: The **Contract Number** will be auto-assigned by the system.

3. Type: PSC – Enter the contract type directly in the field and click on the  icon to validate the selection. Or click on the  icon for a list of contract types, and select PSC.

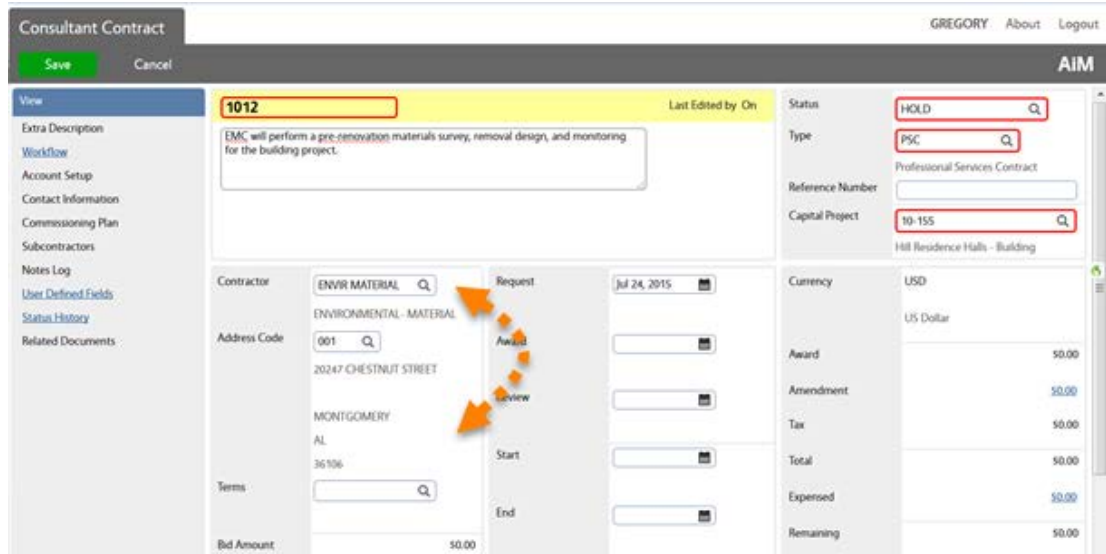


4. Capital Project – Enter the pertinent Project # or click on the  icon for a list of projects from which you can select the appropriate one by clicking on the project number in blue.

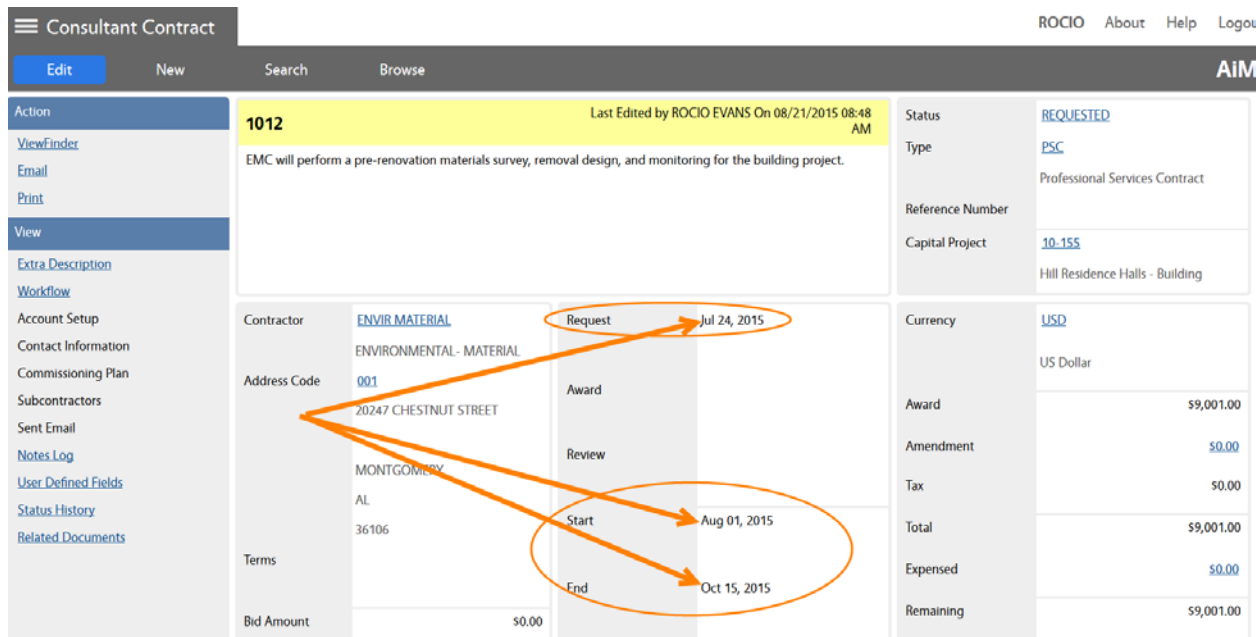
Capital Project	
Capital Project	Description
06-176	Pebble Hill - Building Renovations and New Addition
09-059	M.W. Smith Hall - Roof Replacement
09-130	Hoerlein Hall (Small Animal Clinic) - Roof Replacement
09-183	Band Rehearsal Hall Facility - Phase II, Main Building
10-042	Haley Center - Building Wide, Fire Alarm & Mass Notification System Upgrades

5. Contractor and Address Code – Type in the Contractor's # or name and click on the  icon to confirm the selection. You can also retrieve a comprehensive list of Contractors by clicking on the  icon.

If there is a single Contractor's Address, it will be automatically populated by the system, based on the selected Contractor. If the Contractor has multiple addresses, select the appropriate address code.



6. Request Date – This is the date the Contract is entered into AIM.
7. Start and End Dates – These are the dates/period during which the Contractor will provide services.




8. Notes Log – Two types of notes have to be entered with the information for Items # 2 and # 7 of the PSC Agreement:

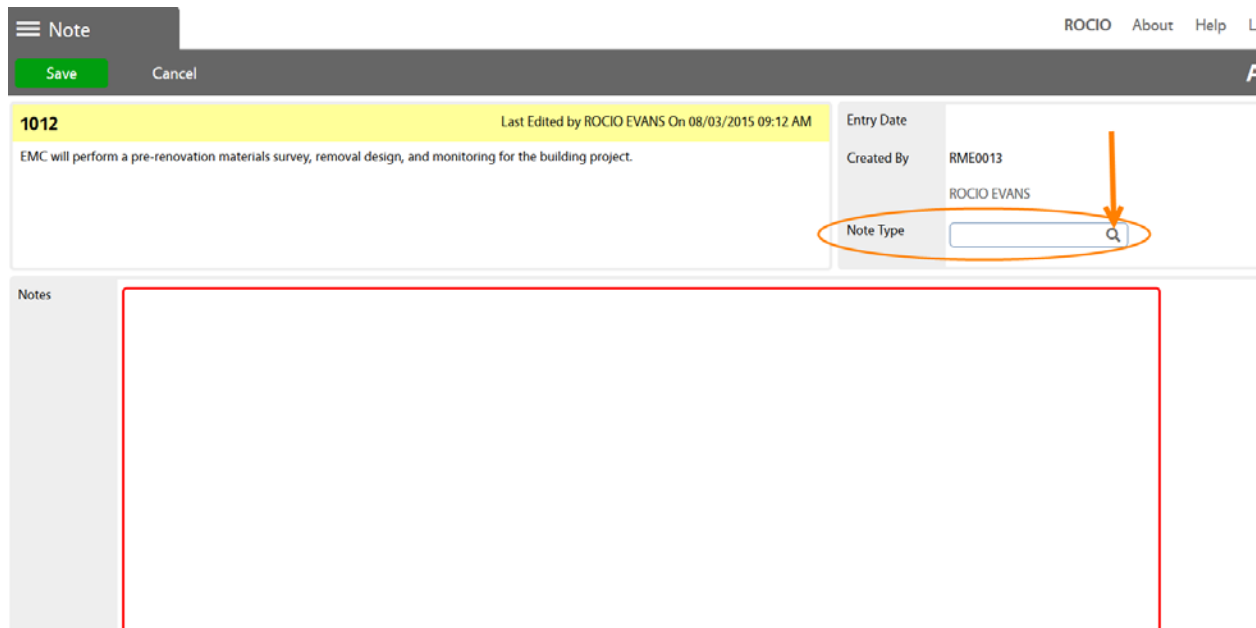
a. Go to the Notes Log view

The screenshot shows the 'Consultant Contract' interface. On the left, there is a sidebar menu with the following items: Action (ViewFinder, Email, Print), View (Extra Description, Workflow), Account Setup, Contact Information, Commissioning Plan, Subcontractors, Sent Email, **Notes Log** (circled in orange with an arrow pointing to it), User Defined Fields, Status History, and Related Documents. The main content area displays contract details for ID 1012, including the description 'EMC will perform a pre-renovation materials survey, rer...', Contractor 'ENVIR MATERIAL', Address Code '001', and location '20247 CHESTNUT STREET, MONTGOMERY, AL 36106'.

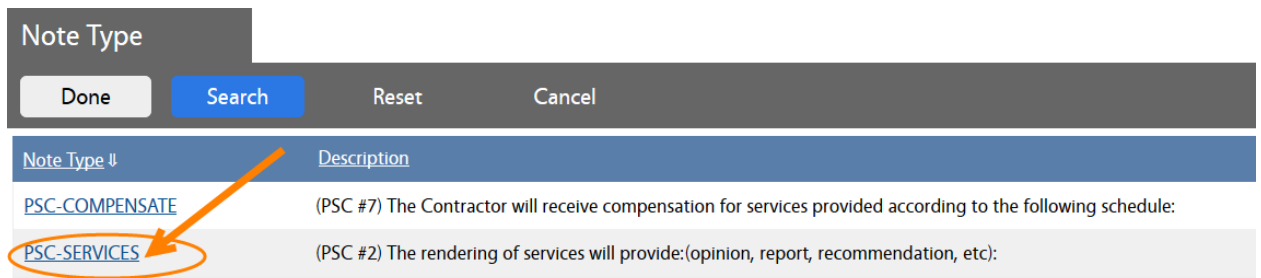
b. Click on **Add**

The screenshot shows the 'Notes Log' interface. At the top right, there are links for 'ROCIO', 'About', 'Help', and 'Logout'. Below the header, there is a 'Done' button and an 'AIM' logo. The main content area shows a note for ID 1012, last edited by Rocio Evans on 08/03/2015. To the right of the note, there are dropdown menus for 'Add to Main Workdesk' and 'Add to Module Workdesk', both set to 'No'. Below these are input fields for 'Note Type' and 'Channel Title'. At the bottom right, there are 'Reset', 'Filter', and **Add** buttons. The 'Add' button is circled in orange with an arrow pointing to it. Below the main content area, there is a search bar with 'From', 'To', and 'contains' filters, and a table header with columns: Entry Date, Created By, Name, Note Type, and Notes.

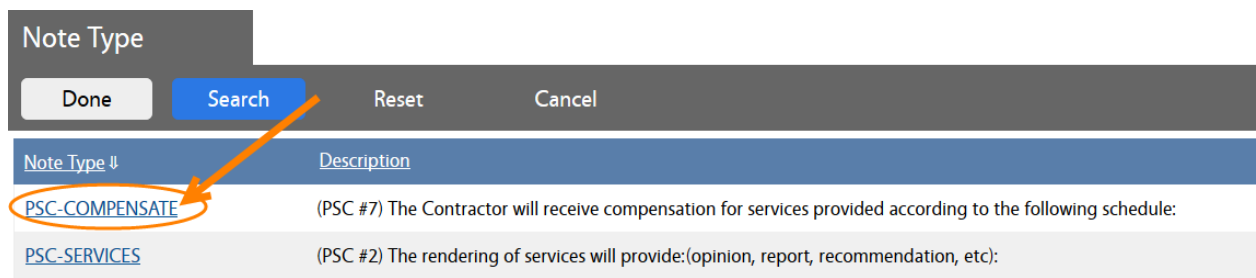
c. Click on the Note Type  icon



- d. Select the option “PSC-SERVICES” (which will populate item # 2 of the agreement)



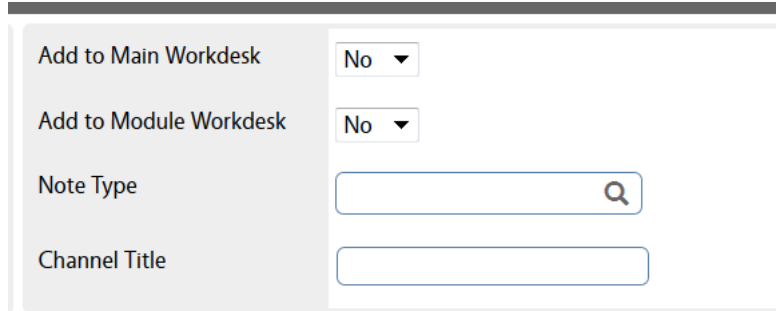
- a. Type in the rendering of services information in the Notes field (which will show under item # 2 of the agreement)
- b. Click on **SAVE**
- c. Click on **Add** again to add the second note
- e. Click on **Note Type** and select the “PSC-COMPENSATE” option (which will populate item # 7 of the agreement)



- f. Type in the Compensation Schedule information in the Notes field (which will show under item # 7 of the agreement)

NOTES:

- You don't need to enter anything on the following fields. They are optional and affect only your workdesk.



Add to Main Workdesk: No

Add to Module Workdesk: No

Note Type: [text input with search icon]

Channel Title: [text input]

- The following fields are SEARCH options on existing Notes.



Notes Log

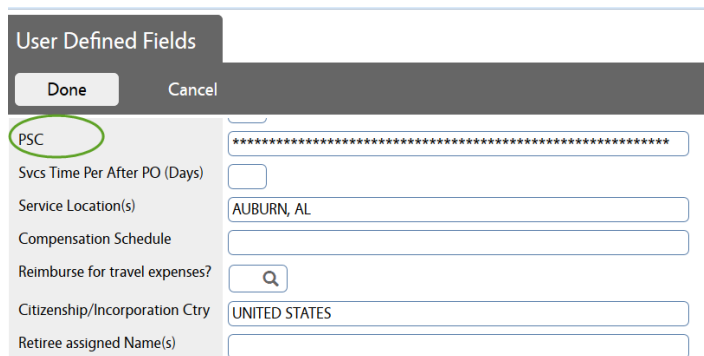
From: [calendar icon] [text input] [search icon]

To: [calendar icon] [text input] [search icon]

contains [dropdown arrow] [text input]

Reset Filter

- 5. Enter User Defined Fields (UDFs) - Scroll to the section with the PSC fields:



User Defined Fields

Done Cancel

PSC: [text input with asterisks]

Svcs Time Per After PO (Days): [checkbox]

Service Location(s): AUBURN, AL

Compensation Schedule: [text input]

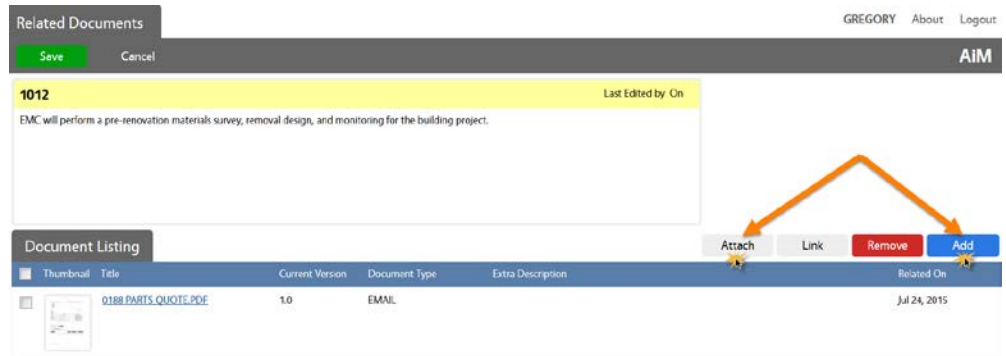
Reimburse for travel expenses?: [text input with search icon]

Citizenship/Incorporation Ctry: UNITED STATES

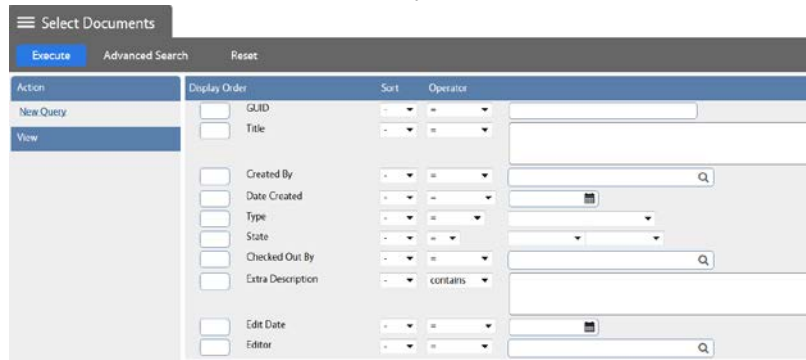
Retiree assigned Name(s): [text input]

- 6. Attach a Quote/Proposal under Related Documents

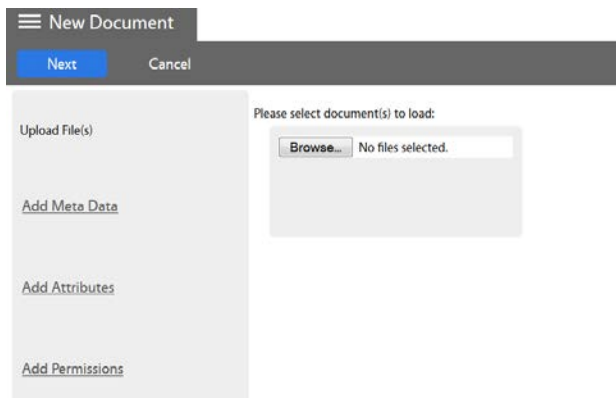
You may “attach” an existing document in AiM or “add” a new document from the network or your computer.



→ To Attach - Search the file that you want to attach:



→ To Add – Browse to the desired file and select it:



- a. Click on **Next** three times to bypass the sections for Meta Data, Attributes, and Permissions. The information for these options is not required.
- b. Click on **Save** on the Related Documents screen.

7. Enter Scope of Work into the Extra Description Field

8. Line Item(s)

Go to the Line Item section and click on “**Add**”. (There is also a “Remove” icon to delete contract line items for edit purposes). Contract line items link to project components and contain the award amount to be applied as a committed cost to the component. The award amount will also roll up to the overall contract award amount.



Enter:

- a. Component Group and Component
- b. Description – The description field can accommodate up to 255 characters. This field is automatically populated with the Component’s description. But, you may change it.
 - i. The Consultant Contract Line Item Screen has an Extra Description, Notes Log, and Related Documents views to capture additional information.
- c. Line Group - This field displays the line group code. The line group code is a reporting element for grouping contract line items.
- d. Award Amount – Enter amount without a comma.
- e. Tax and Tax Rebate if applicable.
- f. Click on **Done**, or **Add** if another line item needs to be entered.

Line Item ROCIO About Logout

Done Add Cancel AiM

003 Last Edited by ROCIO EVANS On 07/27/2015 10:42 AM

Contract 1012
EMC will perform a

Line Group ADDTL SVCS
ADDITIONAL SERVICES

View
Extra Description
Account Setup
Notes Log
Related Documents

AE ADDITIONAL SERVICES

Description

Capital Project	10-155 Hill Residence Halls - Building	Total Budget	\$0.00
Component Group	DESIGN	Remaining	\$0.00
Component	AE ADDITIONAL SERVICE	Percent Complete	

Award 5000
Amendment \$0.00
Tax 1 \$0.00
Tax 2 \$0.00
Tax Rebate \$0.00

Line Total \$0.00
Expensed \$0.00
Remaining \$0.00

Consultant Contract ROCIO About Logout

Save Cancel AiM

User Defined Fields
Status History
Related Documents

Contractor ENVIR MATERIAL
ENVIRONMENTAL- MATERIAL

Address Code 001
20247 CHESTNUT STREET
MONTGOMERY
AL
36106

Terms

Bid Amount \$0.00

Request Jul 24, 2015
Award
Review
Start
End

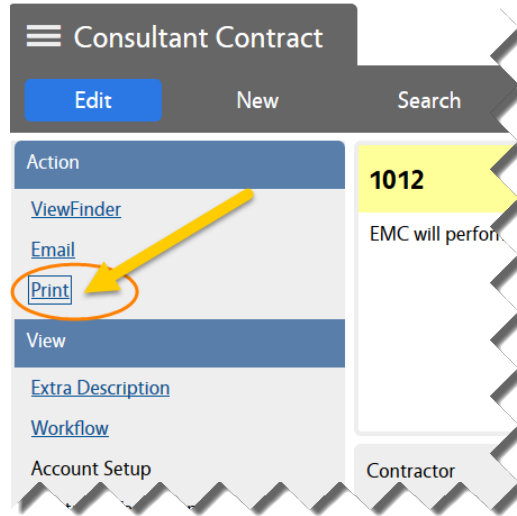
Currency USD
US Dollar

Award \$9,001.00
Amendment \$0.00
Tax \$0.00
Total \$9,001.00
Expensed \$0.00
Remaining \$9,001.00

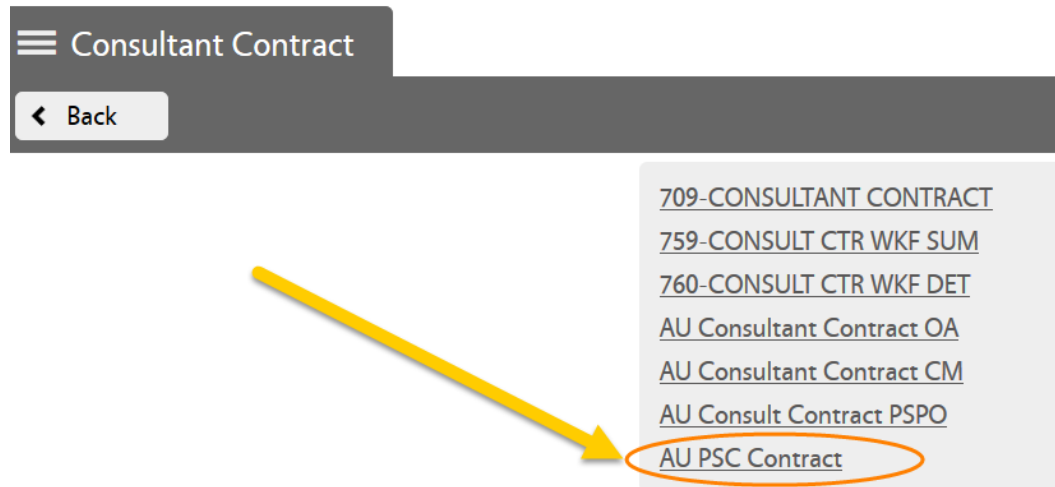
Line	Description	Line Group	Component	Total	Expensed	Remaining
001	AE DESIGN DEVELOPMENT	BASIC SVCS	AE DESIGN DEVELOPMENT	\$1,001.00	\$0.00	\$1,001.00
002	AE BASIC FEE SUMMARY	BASIC SVCS	AE BASIC FEE SUMMARY	\$3,000.00	\$0.00	\$3,000.00
003	AE ADDITIONAL SERVICES	ADDTL SVCS	AE ADDITIONAL SERVICES	\$5,000.00	\$0.00	\$5,000.00

9. Click on **Save**.
10. Print the AU PSC Contract:

- a. Click on **Print**



b. Select the "AU PSC Contract" from the list of available reports.



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

Auburn University

Professional Services Contract

PPS Use Only - PSC Number

AU Department Contact ROCIO EVANS Contact Phone 3348444000

Auburn University, Facilities Management / 1161 W Samford Ave, Auburn, AL 36849 and, ENVIRONMENTAL- MATERIAL CONSULTANTS, the Contractor, hereby agree that:

1. The Contractor, acting in support of (project/contract/grant): 10-155 Hill Residence Halls - Building Renovations & Upgrades at Auburn University will provide the following professional services (be specific):
 EMC will perform a pre-renovation materials survey, removal design and monitoring for the building project. (Use Project Extra Description for the Scope of the Project.)

Extra Description

2. The rendering of services will provide (opinion, report, recommendation, etc):

NOTES LOG

3. The Contractor will provide the above services on the following date, or time period:
 Upon receipt of Purchase Order through: One Hundred (100) days

4. The Contractor will provide the above services at the following location(s): AUBURN, AL

5. The Contractor will be compensated by Auburn University for the above services at the following rate Per proposal; a total not to exceed amount of Nine Thousand One Dollars and 0 Cents (9,001.00)

6. The University Account Number that will fund the activity: 922119102049P100

7. The Contractor will receive compensation for services provided according to the following schedule:

NOTES LOG

8. The Contractor will will not be reimbursed for travel expenses. If travel expenses are to be paid to the contractor, a signed statement of expenses including an itemization of the actual transportation, lodging, meals and miscellaneous expenses with appropriate receipts is to be submitted by the Contractor.

9. The Contractor's country of citizenship (or incorporation) is: UNITED STATES

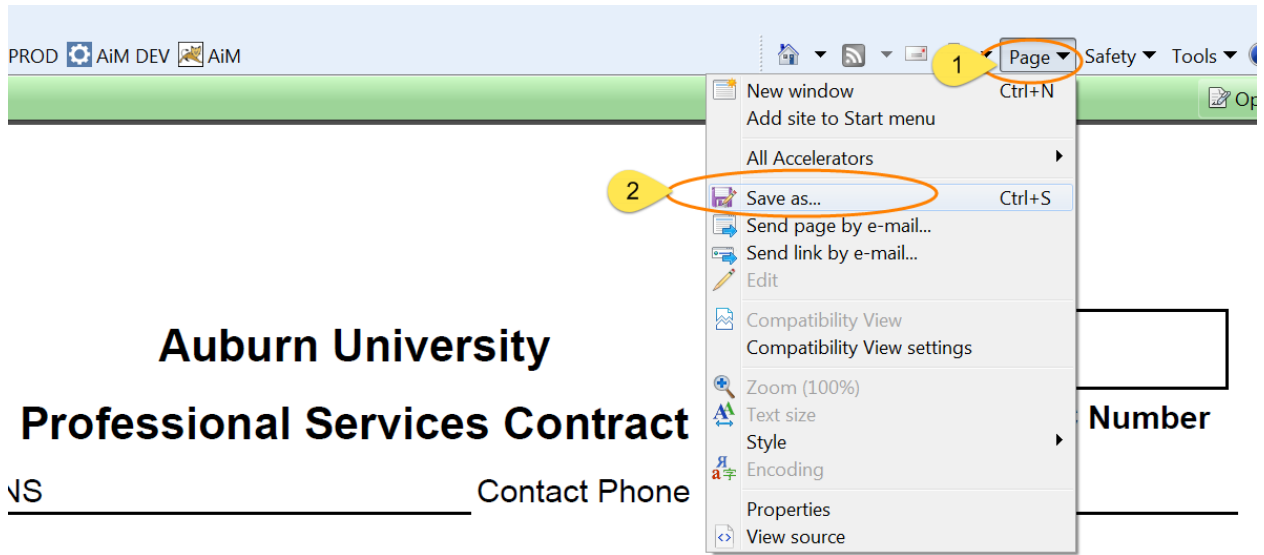
If the country of citizenship is anything other than the US, contact the Non-Resident Alien Tax Specialist at 644-4754 regarding additional paperwork requirements. Payments to the non-US citizens must be approved by the Non-Resident Alien Tax Specialist.

10. Will a retiree(s) from an Alabama Teachers/Employees Retirement Systems (TRS/FRS) affiliated entity be

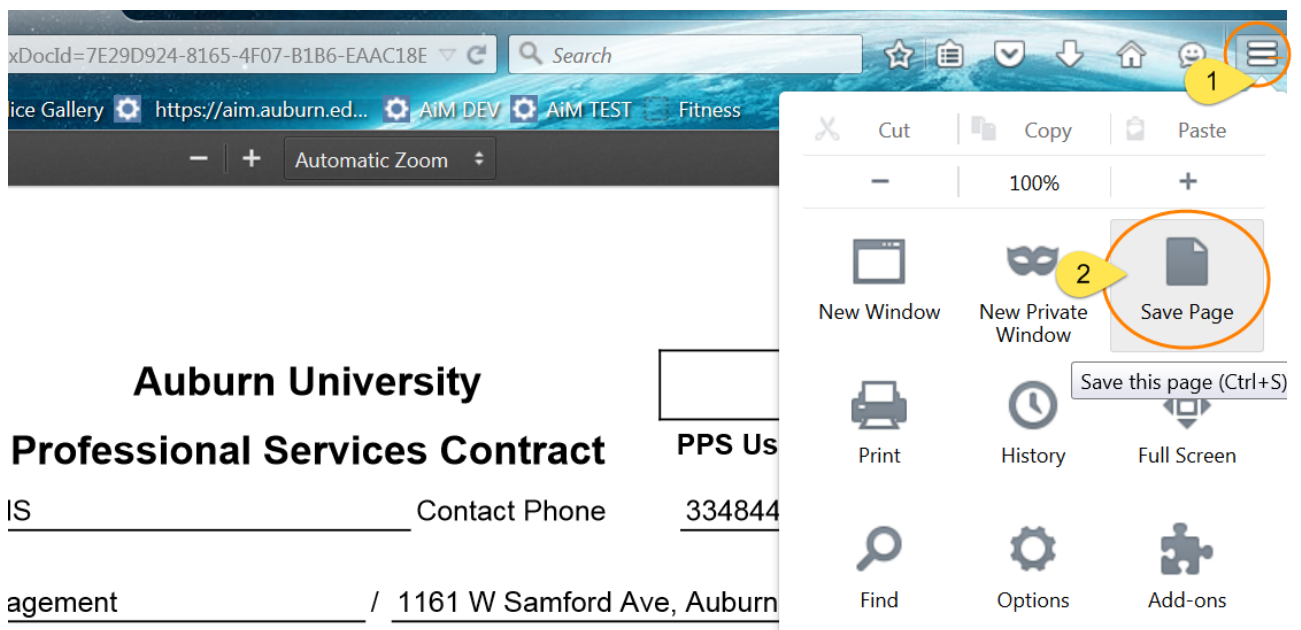
11. Save the agreement as a PDF file in the network folder with the related project documentation.

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

Explorer:

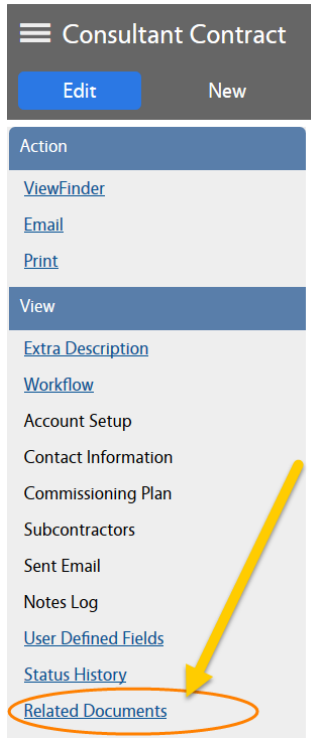


Mozilla Firefox:

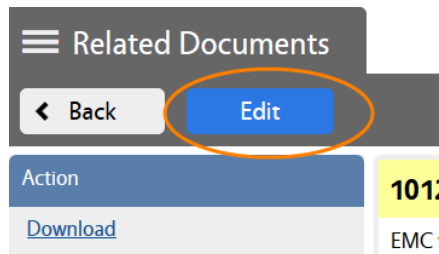


12. Attach the Agreement PDF file as a “Related Document” to the AiM Contract.

- a.** From the main Consultant Contract screen, go to the “Related Documents” view:

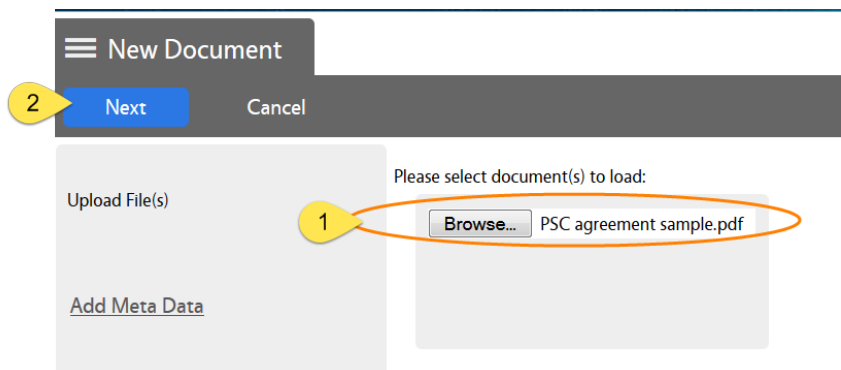


b. On the Related Documents view, click on **Edit**



c. Click on **Add**

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



e. Enter the Document Type. In this case “PSC Agreement”:

New Document

Next Cancel

Upload File(s)

Add Meta Data

Title: PSC agreement sample.pdf

Type: PSC Agreement

f. Click on **Next** three times to bypass meta data and permissions options.

g. Click on **Save** on the Related Documents screen.

Related Documents

ROCIO About Logout

Save Cancel

AIM

1012 Last Edited by ROCIO EVANS On 08/03/2015 09:12 AM

EMC will perform a pre-renovation materials survey, removal design, and monitoring for the building project.

Document Listing

Thumbnail	Title	Current Version	Document Type	Extra Description	Related On
	PSC agreement sample.pdf	1.0	PSC Agreement		Aug 03, 2015
	0189 EST.PDF	1.0	AIM:DOCUMENT		Jul 24, 2015

Attach Link Remove Add

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

Related Documents

Back Edit

Action

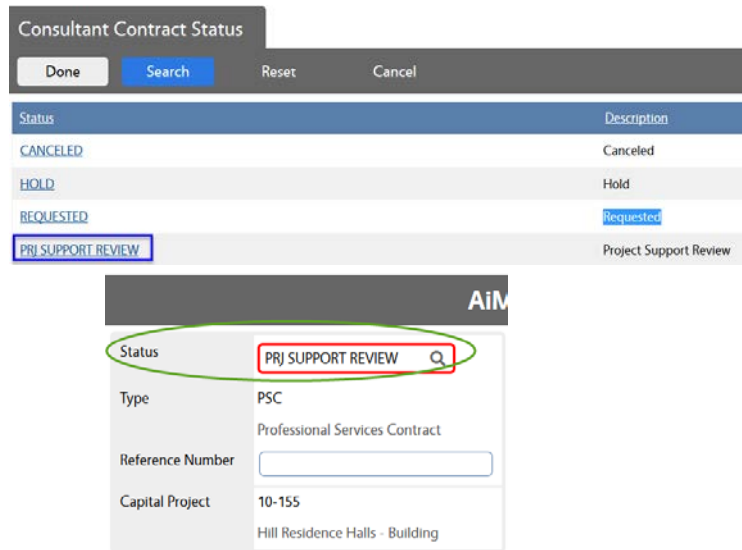
Download

13. Change the Status to “**PRJ SUPPORT REVIEW**” in order to send the agreement to the Contract Specialist for Review.

a. Click on **Edit**



b. Go to Status and select "**PRJ SUPPORT REVIEW**"



14. Click on **Save**

CONTRACT STARTS ROUTING IN THE SYSTEM