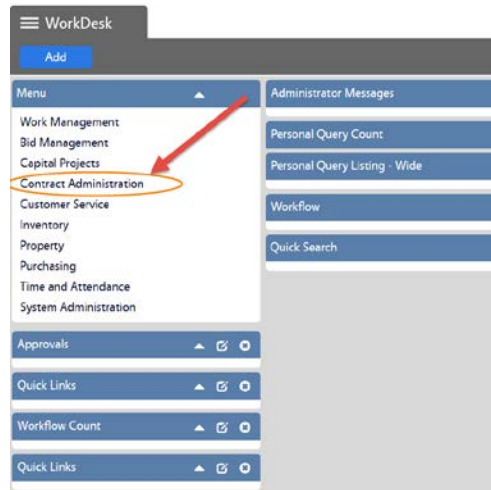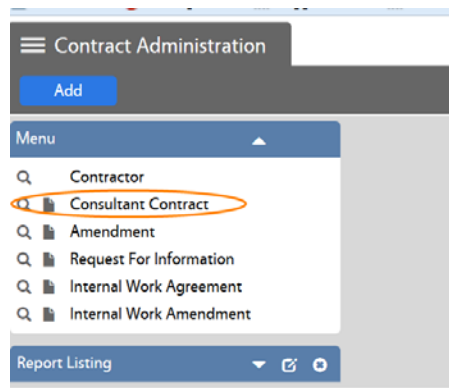## CONSULTANT CONTRACT – PSPO

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

In order to create a new agreement, please follow these steps:
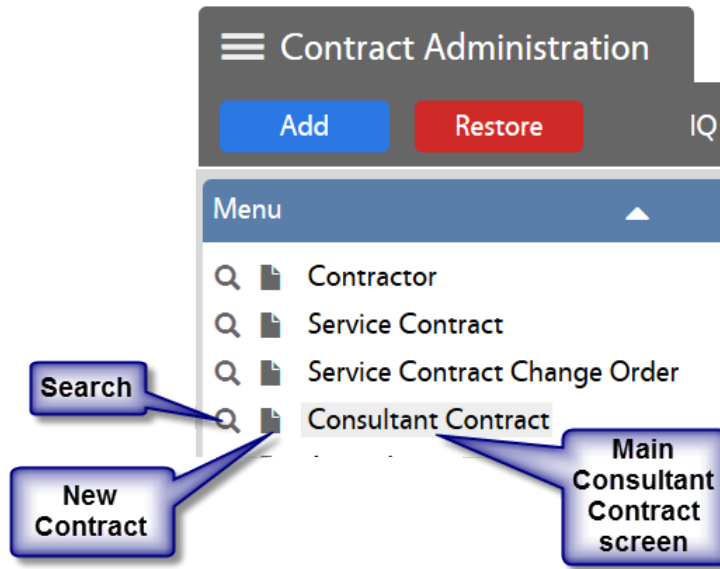
1. Log into the AiM system, and go to the **Contract Administration** screen from the main Menu.
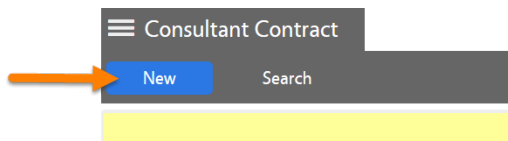

2. Select the **Consultant Contract** menu option.

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

3. Click on the **New** blue button on the Consultant Contract screen

4. Enter the following information:
   1) Description – Enter contract name and brief description. (This field contains 255 characters only.) The scope of the project should be entered into the "Extra Description" view.
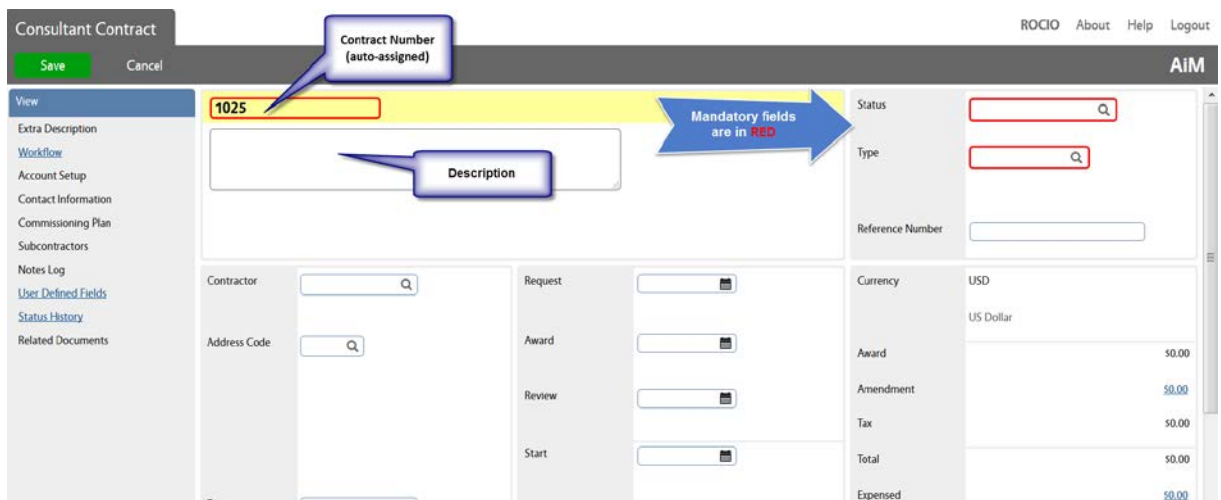
NOTE: The **Contract Number** will be auto-assigned by the system.

2) Request Date (Date Contract is entered into AiM)

3) Select the "PSPO" Contract Type - Enter the contract type directly in the field or click on the 🔍 icon for a list of contract types.

Consultant Contract Type	
Done Search Cancel	
Type ⇩	**Description**
CM AGREEMENT	CM Agreement
OA	OA
PSC	Professional Services Contract
PSPO	PSPO

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	
Done Search Reset Cancel	
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) Enter UDFs - Complete the fields under the PSPO Agreement section.
   <u>Note</u>: Fields in **RED** are required.
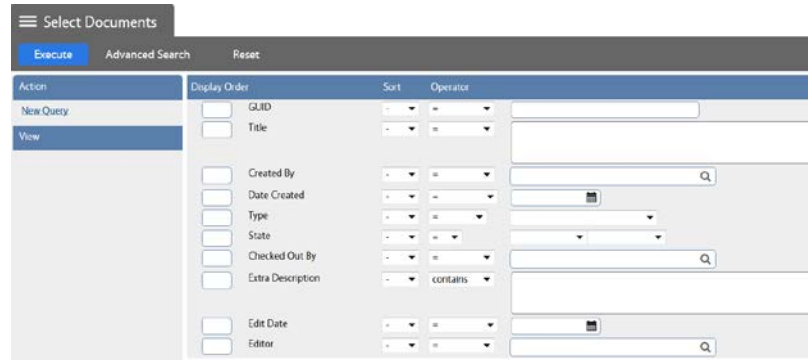
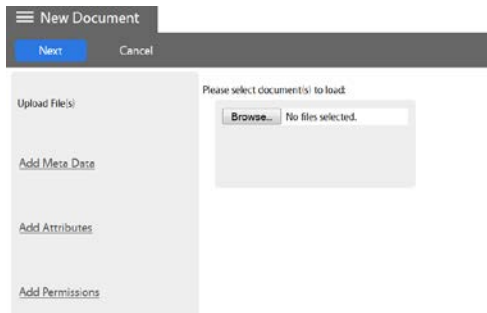

7) Attach Quote/Proposal as a related document

    You may "attach" an existing document in AiM or "add" a new document from the network or your computer.
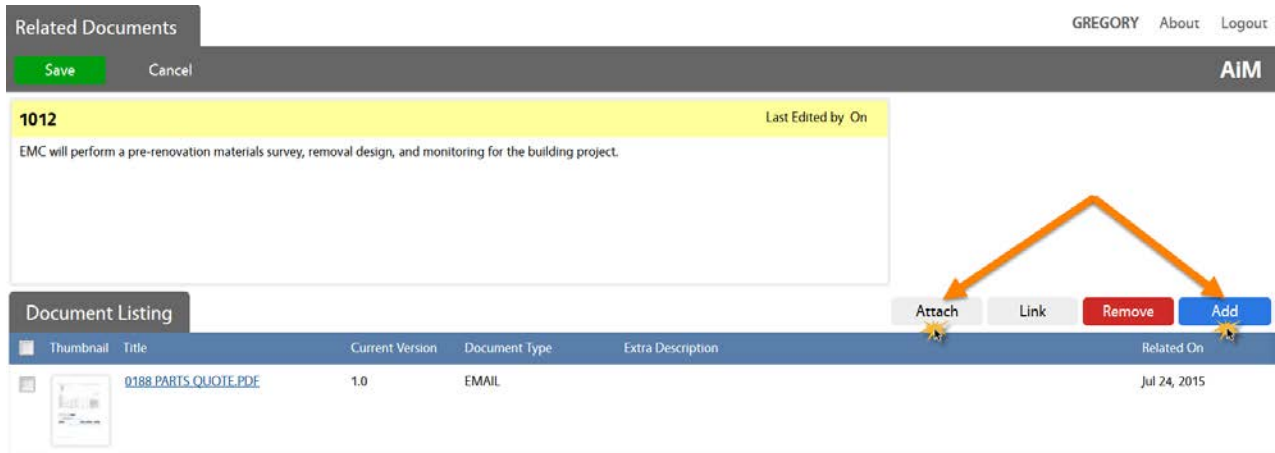
To Attach - Search the file that you want to attach:

➔ 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.

8) Enter Scope of Work into the Extra Description Field

9) 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.

   ➢ 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 <u>without</u> a comma.
e. Tax and Tax Rebate if applicable.
f. Click on **Done**, or **Add** if another line item needs to be entered.

5. Click on **Save**.

6. Print the AU PSPO Contract
   1) Click on **Print**
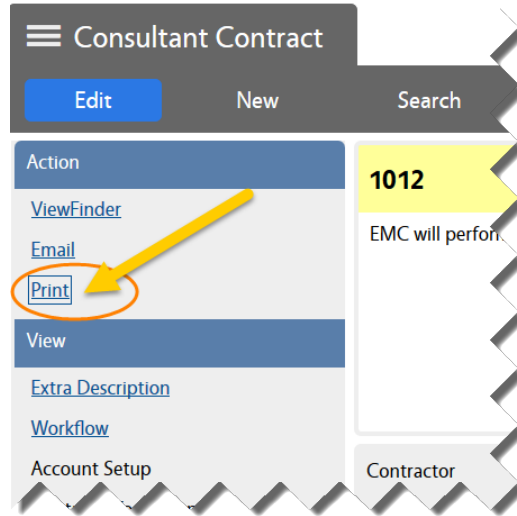
2) Select the "AU Consult Contract PSPO" from the list of available reports.

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

Required information for Professional Services Purchase Order

* <u>Three (3) conditions that MUST be met to use a PSPO in lieu of a PSC:</u>

1. The service is to be provided by (check one):
   a. ___ An individual (if checked, stop here – a PSC must be used if an individual)
   b. _X_ A company (proceed to #2)

2. Is there a project under which this service will fall (PIF and Project # already exist)?
   a. _X_ Yes (proceed to #3)
   b. ___ No (if checked, stop here – PSC must be used if no project exists)

3. Is there currently or will there be actual construction (contracted or in-house) costs associated with this exact project?
   a. _X_ Yes (all conditions have now been met, a PSPO may be used in lieu of a PSC)
   b. ___ No (if checked, stop here – PSC must be used if there will be no construction costs.)

4. If all three conditions are met and the **cost of the service will be under $2,500.00, a PO is NOT required** unless desired. The vendor can simply invoice AU listing the project name and project number on the invoice.

|		
*	Project Number:	10-155
*	Project Name:	New PSPO Agreement - Test Description here
*	What FOAP are you charging this contract to?	922119102048P100
*	Firm's Name/Address:	Bailey-Harris Construction Company Inc. 1552 Bailey Harris Drive, null, Auburn, AL 36830
*	Firm's Email Address:	Dennis Hamlet, null
*	PSPO Amount:	Work is Dollars and 0 Cents ($0.00).
*	Scope of Work:	

3) 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:
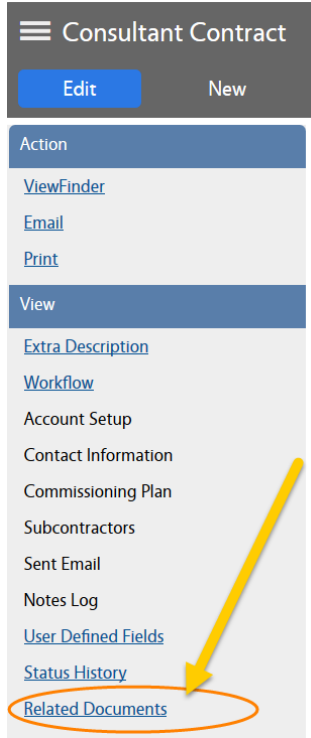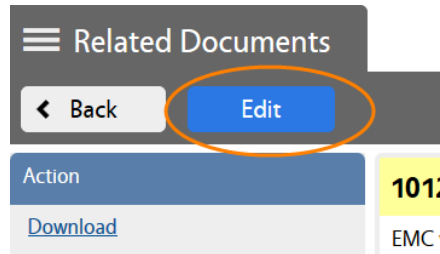
Explorer:
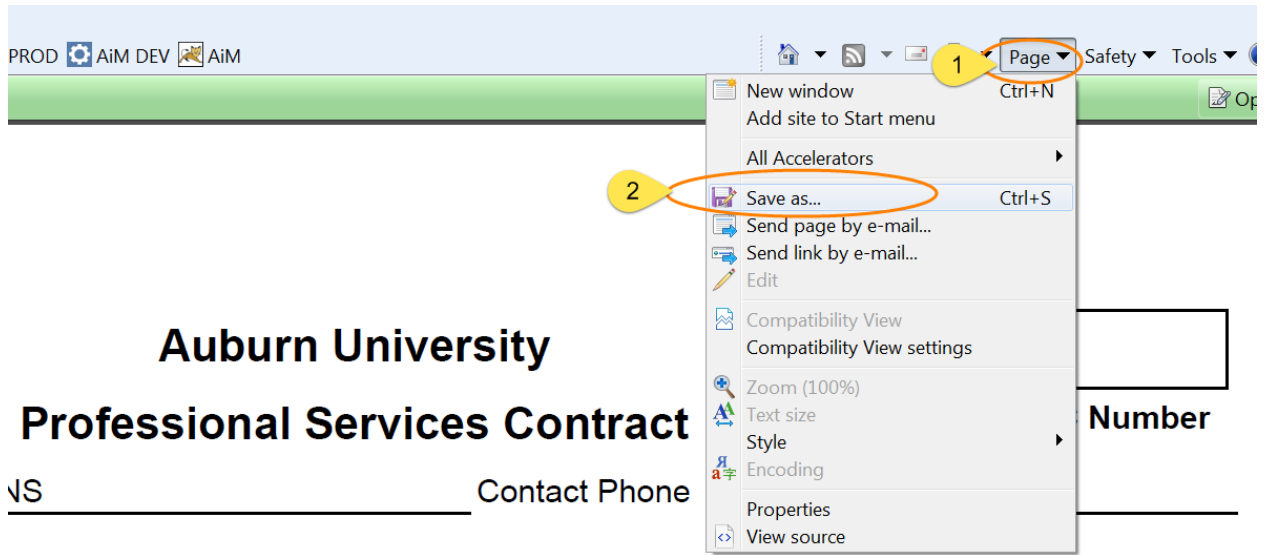
Mozilla Firefox:
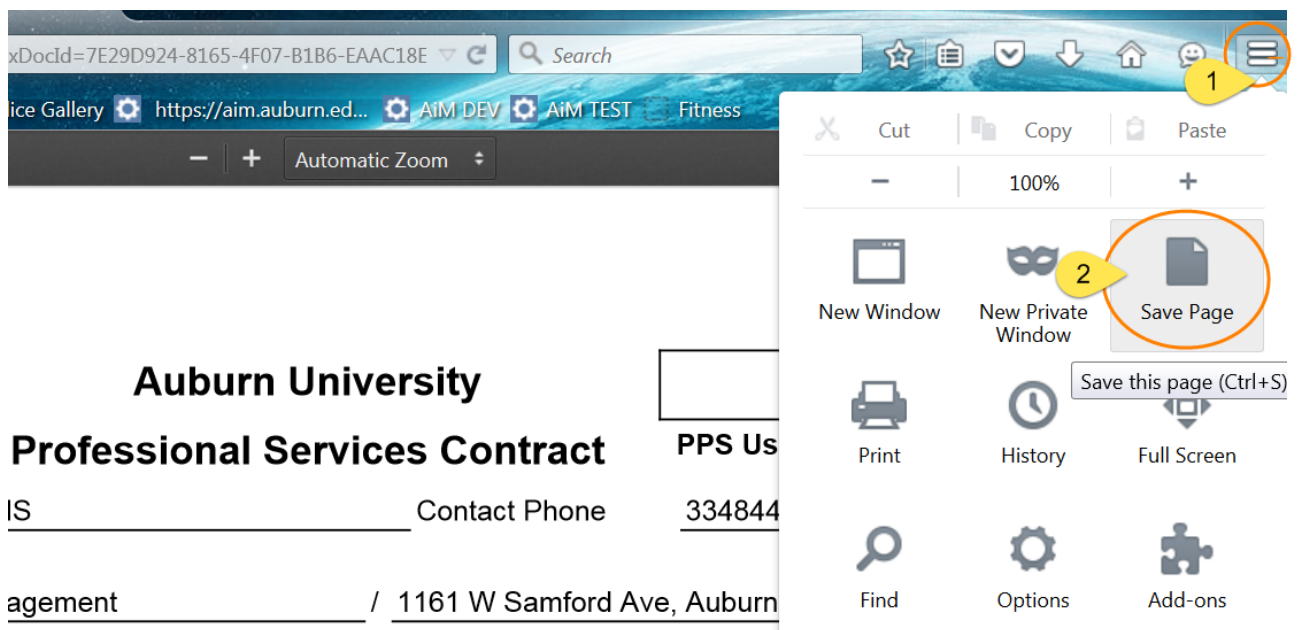
4) Attach the Agreement PDF file as a "Related Document" to the AiM Contract.

    a.   From the main Consultant Contract screen, go to the "**Related Documents**" view:
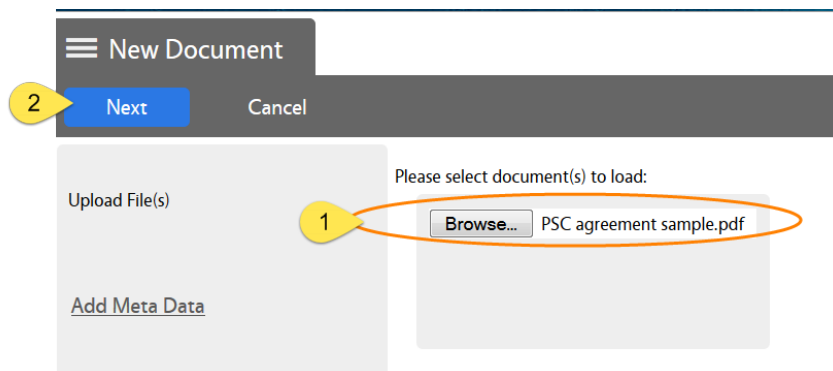
b. On the Related Documents view, click on **Edit**

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

e.   Enter the Document Type. In this case "PSPO Agreement":

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

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

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

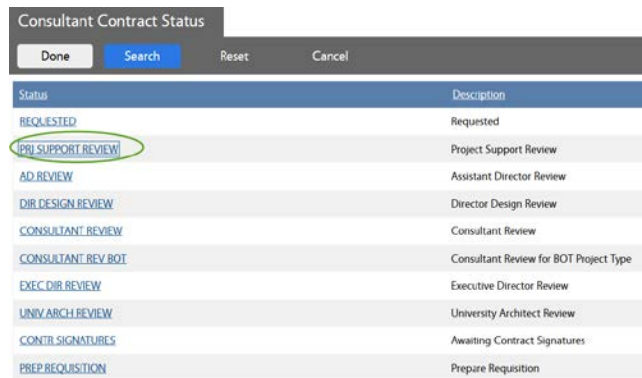**7.** Change the Status to "**PRJ SUPPORT REVIEW**" in order to send the agreement to the Contract Specialist for Review.

1) Click on **Edit**

2) Select the Status "**PRJ SUPPORT REVIEW**"

3) Click on **Save**

CONTRACT STARTS ROUTING IN THE SYSTEM: