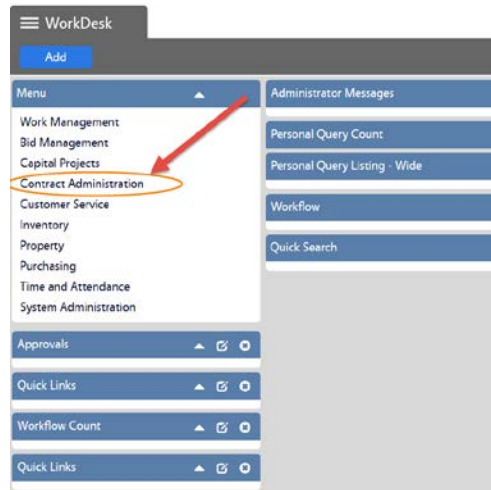


CONSULTANT CONTRACT – PSPO

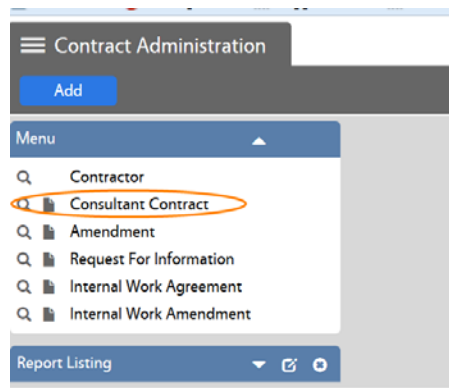
The **UPL / COORDINATOR** will initiate new agreements.

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

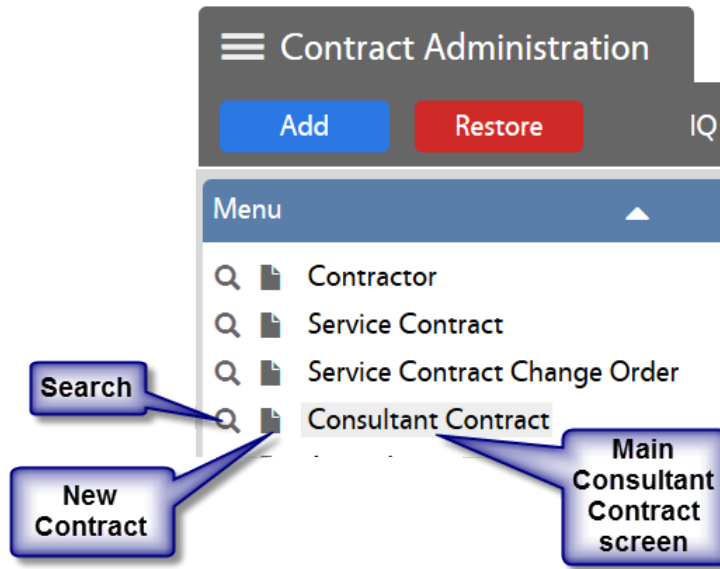
1. Log into the AiM system, and go to the **Contract Administration** screen from the main Menu.



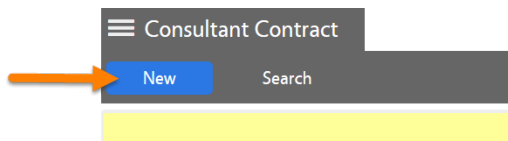
2. Select the **Consultant Contract** menu option.



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

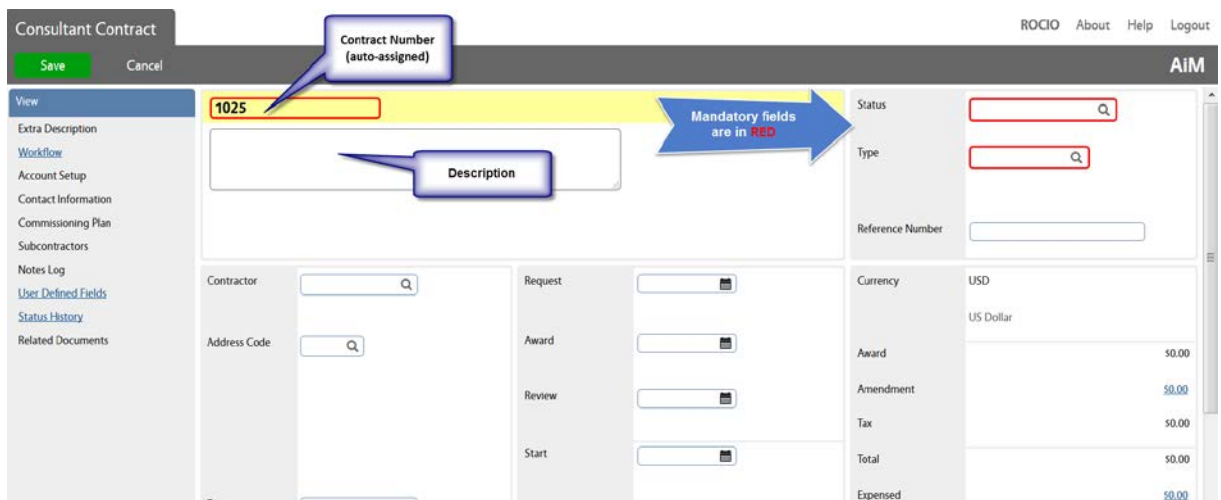


3. Click on the **New** blue button on the Consultant Contract screen




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.

- Request Date (Date Contract is entered into AiM)
- 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
QA	QA
PSC	Professional Services Contract
PSPO	PSPO

- 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

- 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.

Consultant Contract ROCIO About Logo

Save Cancel AiM

View 1023 Last Edited by On

Extra Description
[Workflow](#)
 Account Setup
 Contact Information
 Commissioning Plan
 Subcontractors
 Notes Log
[User Defined Fields](#)
[Status History](#)
 Related Documents

New PSPO Agreement - Test
 Description here

Status:

Type:

Reference Number:

Capital Project:
 Hill Residence Halls - Building

Contractor: Request:

Bailey-Harris Construction

Address Code: Award:

1552 BAILEY HARRIS DRIVE

AUBURN

AL

36830

Review:

Start:

Currency: USD

US Dollar

Award	\$0.00
Amendment	\$0.00
Tax	\$0.00
Total	\$0.00

- 6) Enter UDFs - Complete the fields under the PSPO Agreement section.
Note: Fields in **RED** are required.

User Defined Fields

Done Cancel

Service Location(s):

Compensation Schedule:

Reimburse for travel expenses?:

Citizenship/Incorporation Ctry:

Retiree assigned Name(s):

PSPO Agreement:

PSPO Condition #1: COMPANY:

PSPO Condition #2: PROJECT:

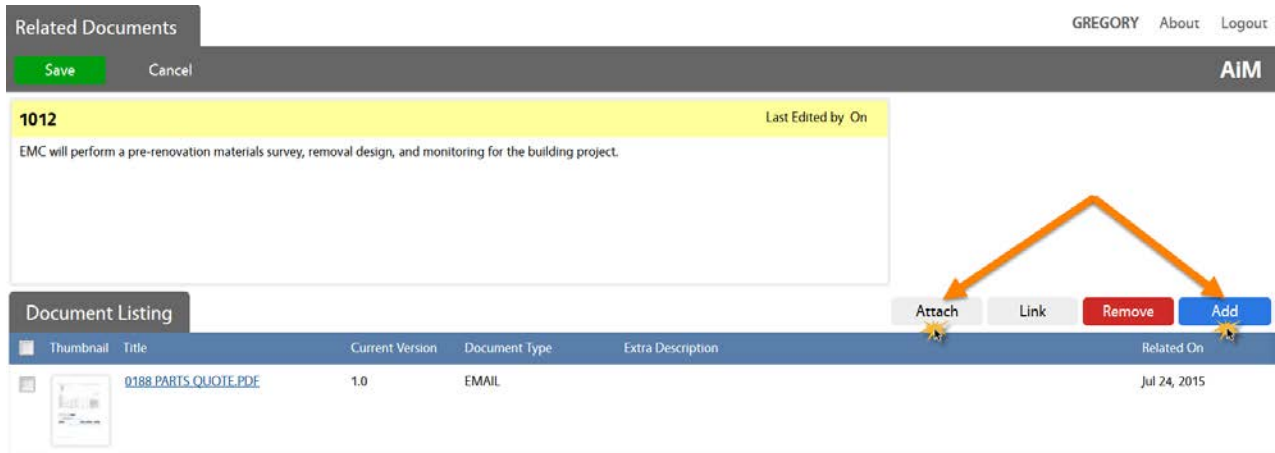
PSPO Condition #3: CONST. COST:

Cost of Service:

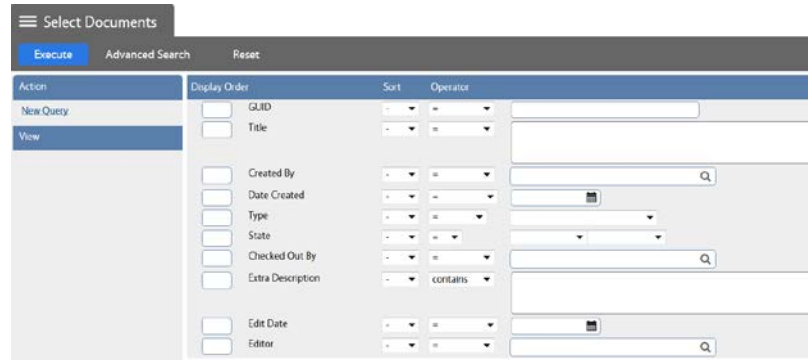
Required Documentation:

- 7) Attach Quote/Proposal as a related document

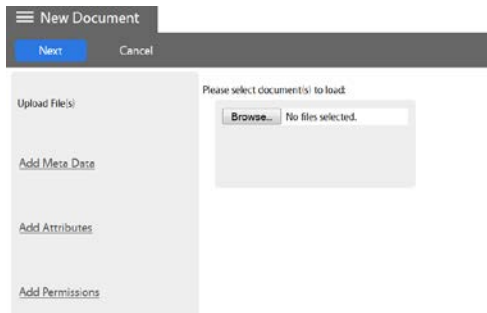
You may “attach” an existing document in AiM or “add” a new document from the network or your computer.



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 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

View

[Extra Description](#)

[Account Setup](#)

[Notes Log](#)

[Related Documents](#)

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

AE ADDITIONAL SERVICES

Description

Capital Project: 10-155
Hill Residence Halls - Building

Component Group: DESIGN

Component: AE ADDITIONAL SERVICE

Total Budget: \$0.00

Remaining: \$0.00

Percent Complete:

Contract: 1012
EMC will perform a

Line Group: ADDTL SVCS

ADDITIONAL SERVICES

Totals

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

Request: Jul 24, 2015

Currency: USD

Address Code: 001

Award: \$9,001.00

Review: \$0.00

Tax: \$0.00

Start: \$9,001.00

End: \$0.00

Remaining: \$9,001.00

ENVIRONMENTAL- MATERIAL

20247 CHESTNUT STREET

MONTGOMERY

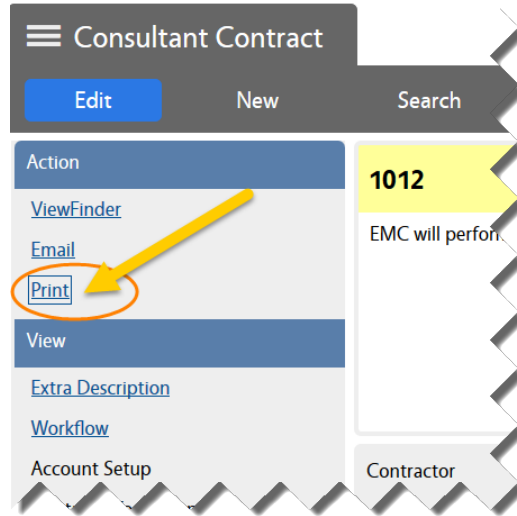
AL

36106

Bid Amount: \$0.00

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

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

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

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. A company (proceed to #2)

2. Is there a project under which this service will fall (PIF and Project # already exist)?

- a. 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. 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

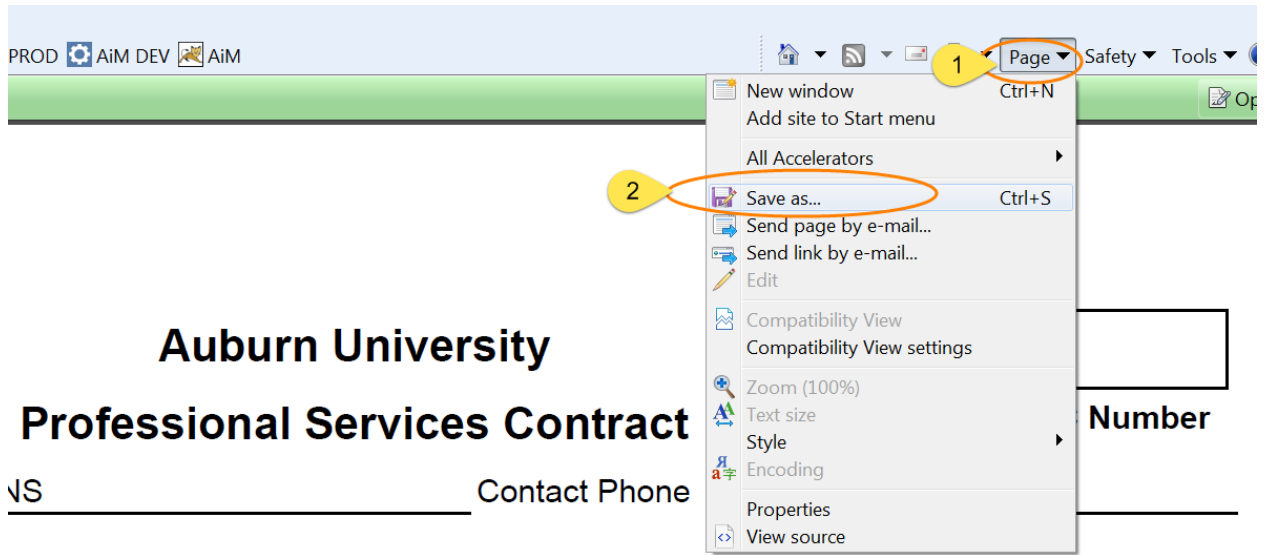
* PSPO Amount: Work is Dollars and 0 Cents (\$0.00).

* Scope of Work: _____

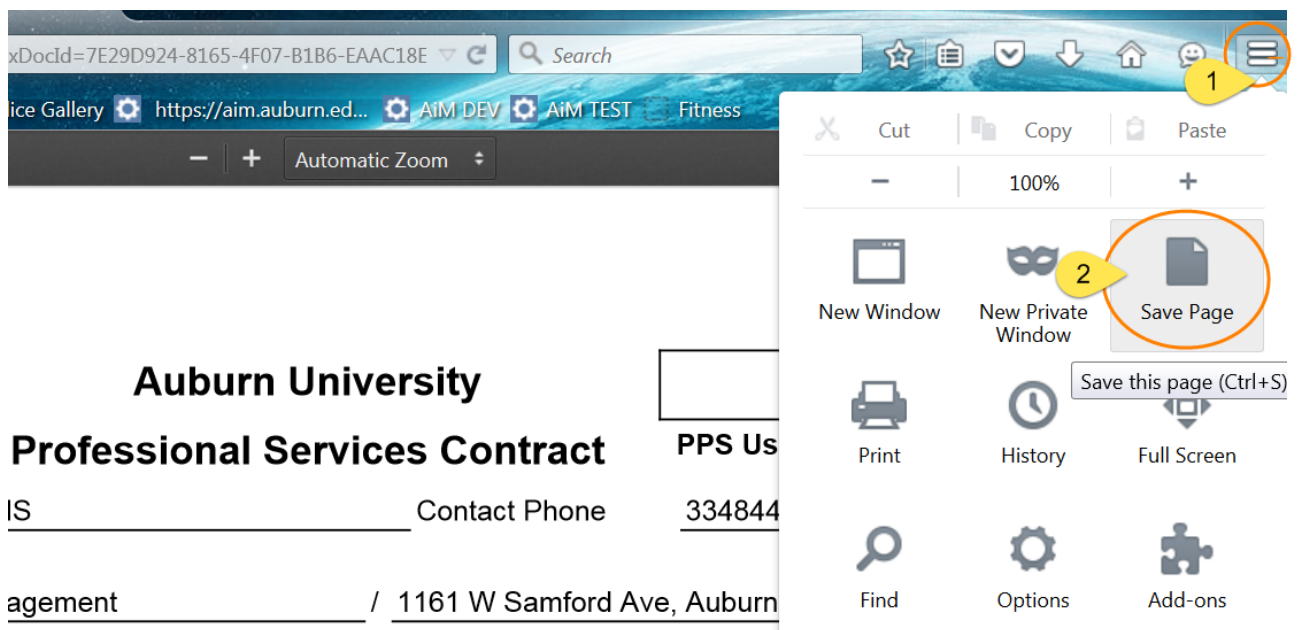
- 3) Save the agreement as a PDF file in the network folder with the related project documentation.

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

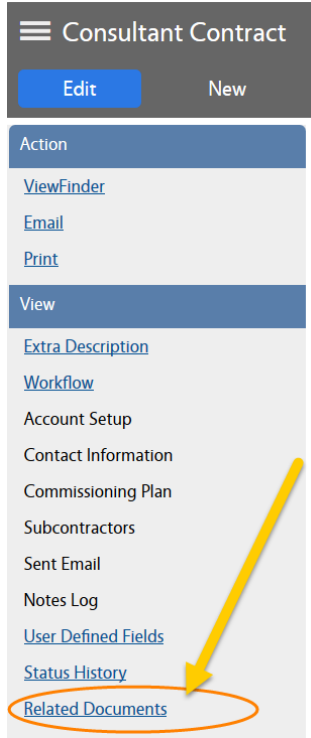
Explorer:



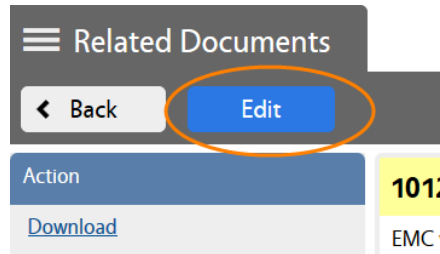
Mozilla Firefox:



- 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:

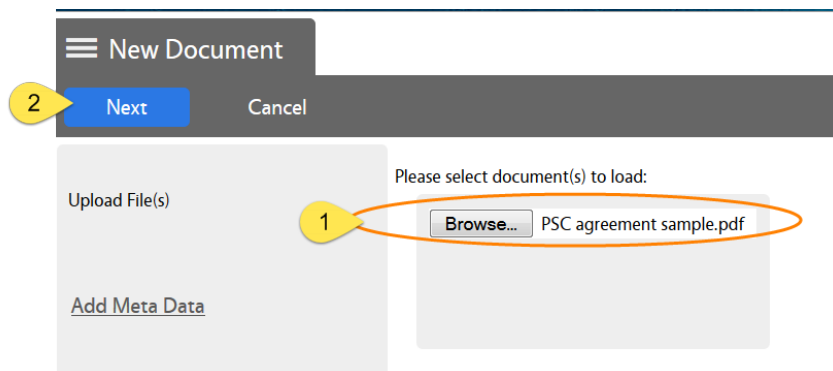


b. On the Related Documents view, click on **Edit**



c. Click on **Add**

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



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

New Document

Next Cancel

Upload File(s)

Add Meta Data

Title PSPO Contract #123_Sample.pdf

Type 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.

Related Documents

ROCIO About Logout

Save Cancel

1023 Last Edited by ROCIO EVANS On 07/29/2015 10:20 AM

New PSPO Agreement - Test
Description here

Document Listing

Attach Link Remove Add

Thumbnail	Title	Current Version	Document Type	Extra Description	Related On
	PSPO.pdf	1.0	PSPO Agreement		Aug 03, 2015

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

Related Documents

Back Edit

Action

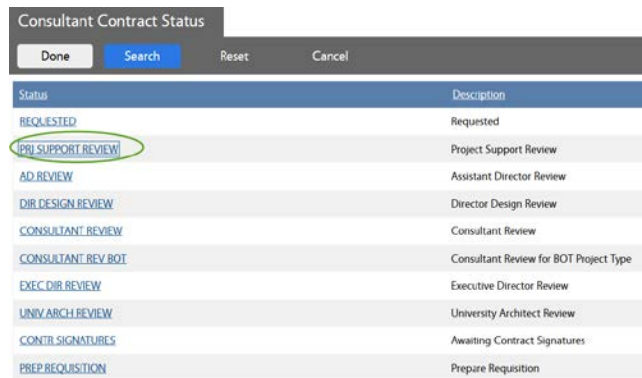
Download

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: