

Contract Amendments

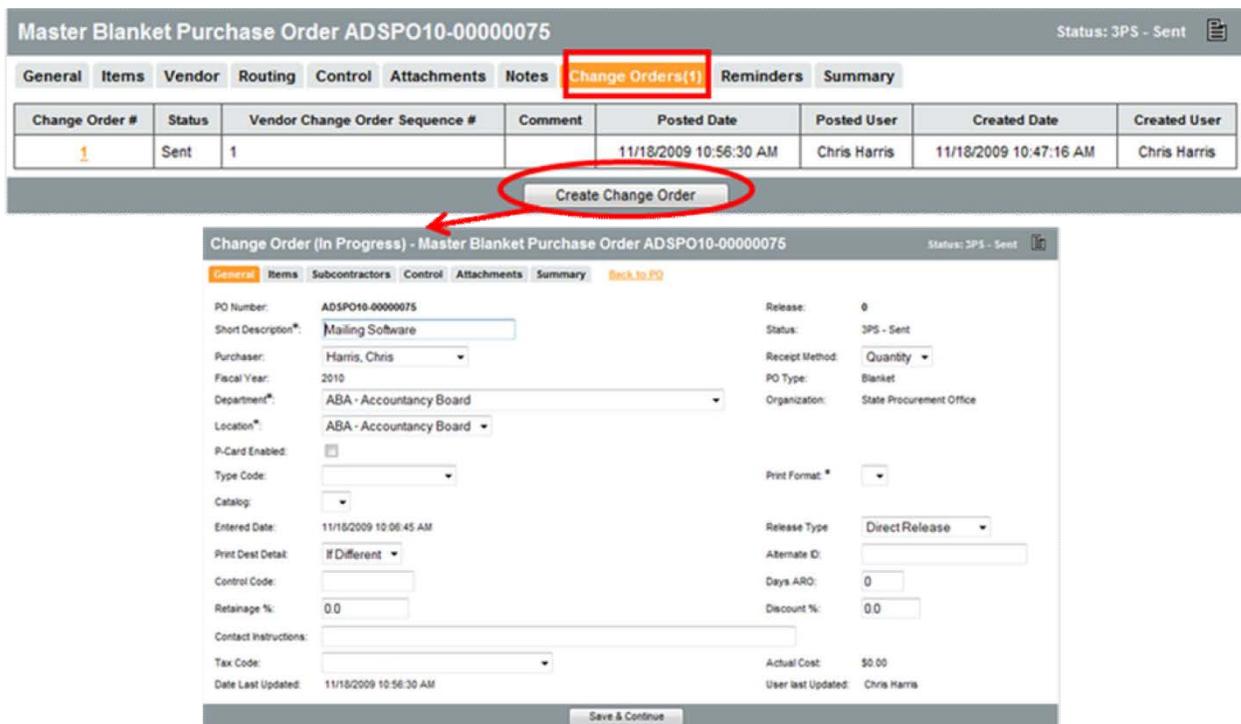
This Quick Reference Guide provides an overview of the steps required to process contract amendments in ProcureAZ. Change Order documents are the mechanism used to modify any contract (Blanket PO) that has been sent to a contractor. These changes include, but are not limited to:

- Changes to quantities
- Changes to pricing
- Changes in terms and conditions
- Contract extensions
- Adding/removing attachments

Creating Change Orders

If you determine that an amendment to a contract is necessary, find the Blanket PO and select the Change Orders tab. From here you'll be able to view any previously completed amendments. If you have the appropriate rights, you'll also see a **Create Change Order** button. Creating a new Change Order will display a copy of the Blanket PO, but with only five tabs available to be edited.

You'll initially be shown the General tab, which allows you to edit all of the fields. If any changes are made, click **Save & Exit** before proceeding through the remaining tabs.



The screenshot shows the 'Master Blanket Purchase Order ADSP010-00000075' interface. The 'Change Orders(1)' tab is selected, displaying a table with one entry:

Change Order #	Status	Vendor Change Order Sequence #	Comment	Posted Date	Posted User	Created Date	Created User
1	Sent	1		11/18/2009 10:56:30 AM	Chris Harris	11/18/2009 10:47:16 AM	Chris Harris

Below the table is a 'Create Change Order' button, which is circled in red. An arrow points from this button to the 'Change Order (In Progress)' form below.

The 'Change Order (In Progress)' form for 'Master Blanket Purchase Order ADSP010-00000075' contains the following fields:

- PO Number: ADSP010-00000075
- Short Description*: Mailing Software
- Purchaser: Harris, Chris
- Fiscal Year: 2010
- Department*: ABA - Accountancy Board
- Location*: ABA - Accountancy Board
- P-Card Enabled:
- Type Code: [Dropdown]
- Catalog: [Dropdown]
- Entered Date: 11/18/2009 10:06:45 AM
- Print Dest Detail: If Different
- Control Code: [Text]
- Retainage %: 0.0
- Contact Instructions: [Text]
- Tax Code: [Dropdown]
- Date Last Updated: 11/18/2009 10:56:30 AM
- Release: 0
- Status: 3PS - Sent
- Receipt Method: Quantity
- PO Type: Blanket
- Organization: State Procurement Office
- Print Format: [Dropdown]
- Release Type: Direct Release
- Alternate ID: [Text]
- Days ARO: 0
- Discount %: 0.0
- Actual Cost: \$0.00
- User last Updated: Chris Harris

A 'Save & Continue' button is located at the bottom of the form.

Once the Change Order document is created, you can edit any of the following tabs from the Blanket PO:

- **General Tab** – Overall data related to the contract.
- **Items** – Item-level information, including pricing, quantity, description, etc. You can also cancel individual items from this tab.
- **Subcontractor** – If subcontractors are being tracked on the contract, you can update subcontractor data in case of termination, etc.

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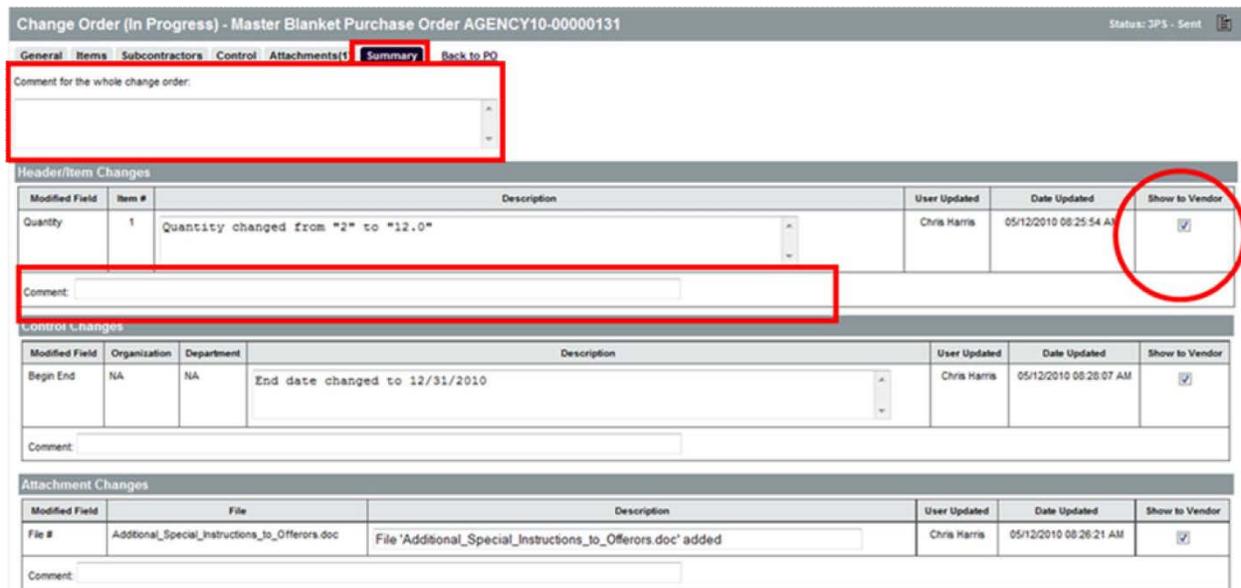
- **Attachments** – New attachments can be added to the contract, and you can choose whether to make attachments visible to the vendor.
- **Blanket/Contract Control** – The terms of the contract can be extended and the Organizations with rights to order off of the contract can be changed.

NOTE: The contractor cannot be modified through Change Orders. Rather, if you need to assign a contract/purchase order to a new vendor, you must set the existing Purchase Order to expire and create a new Purchase Order to the new vendor.

Finalizing and Submitting Change Order

Once you have made all required edits on the Change Order, the Summary tab will automatically list the changes made. If you want to provide additional description of the changes made, you can:

- Add a comment that applies to the whole Change Order – entering information here will notify the vendor automatically and your comment will be viewable;
- Add additional comments for each individual modification on the Change Order – these comments do not trigger an automated notice but are viewable if Show to Vendor is checked;
- Edit the description of the modifications made on the Change Order in the **Description** field;
- Decide whether to show vendors each modification.



Change Order (In Progress) - Master Blanket Purchase Order AGENCY10-00000131 Status: 3PS - Sent

General Items Subcontractors Control Attachments(1) **Summary** Back to PO

Comment for the whole change order:

Modified Field	Item #	Description	User Updated	Date Updated	Show to Vendor
Quantity	1	Quantity changed from "2" to "12.0"	Chris Harris	05/12/2010 08:25:54 AM	<input checked="" type="checkbox"/>

Comment:

Modified Field	Organization	Department	Description	User Updated	Date Updated	Show to Vendor
Begin End	NA	NA	End date changed to 12/31/2010	Chris Harris	05/12/2010 08:28:07 AM	<input checked="" type="checkbox"/>

Comment:

Modified Field	File	Description	User Updated	Date Updated	Show to Vendor
File #	Additional_Special_Instructions_to_Offerors.doc	File 'Additional_Special_Instructions_to_Offerors.doc' added	Chris Harris	05/12/2010 08:28:21 AM	<input checked="" type="checkbox"/>

Comment:

Bilateral Change Orders

If you want the vendor to accept or reject the Change Order before it is applied, you can use ProcureAZ's bilateral Change Order feature. This will route the Change Order to the vendor for approval following your internal approvals. To trigger this feature, check **Bilateral Change Order Enabled**. This feature is generally reserved for contract extensions and should be avoided for administrative changes such as accounting updates.



Bilateral Change Order

Bilateral Change Order Enabled (Approval by Vendor will be required)

Save & Continue Submit for Approval Delete Change Order

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Once all edits are done, click **Submit for Approval**. Any approval paths that apply to this Change Order will be triggered. In addition, for Bilateral Change Orders, you can select which Vendor user(s) to notify to request approval.

Bilateral Change Order is enabled. The vendor will be added as the final approver. The vendor users selected below will receive the approval notification email.

Vendor	Users
000000696 - Sportime LLC	<input checked="" type="checkbox"/> Sean Bevan <input checked="" type="checkbox"/> Test Vendor

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Applying Change Orders

Once all approvals have been received, the Change Order will be listed on the Procurement Officer's Homepage under the PO>Change Order tab. Open the Change Order, and click **Apply Change Order** on the Summary tab. The Blanket PO will be updated with all changes once applied.

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