



## PSC Agreement Training Document

Presented by: OnIndus



## Table of Contents

<b>Overview</b>	<b>3</b>
<b>Workflow</b>	<b>3</b>
<b>Create a Contract</b>	<b>5</b>
Contract Action Buttons	7
<b>PSC Step of PSC Agreement</b>	<b>8</b>
Adding Items	8
Adding AE Subconsultant Information	9
Adding AE Hourly Rate Schedule	10
<b>Project Manager Step of PSC Agreement</b>	<b>11</b>
<b>Financial Manager Step of PSC Agreement</b>	<b>12</b>
<b>On Approval of PSC Agreement</b>	<b>13</b>
<b>Resources</b>	<b>14</b>



## **Overview**

The Expense Contracts application allows you to create a downstream Contract against your budget.

The system will track the Schedule of Values for the contract. Cost amounts are tracked in Work Breakdown according to status.

To access the Expense Contracts application, please open the Apps repository.

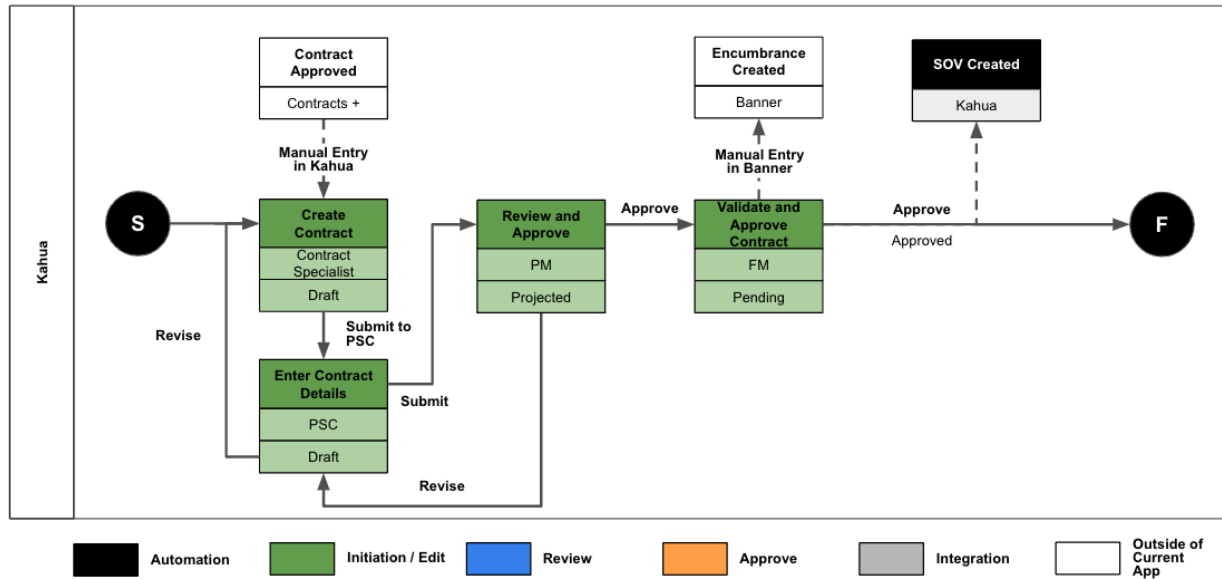
Under the Cost Management suite of applications click on Expenses.

This will launch the Expenses Applications which will include:

- **Contracts**
- Change Requests
- Change Orders
- Pay Requests
- Purchase Orders
- Purchase Order Change Orders
- Invoices



# Workflow





## Create a Contract

1. **Note:** Only Contract Specialists will be initiating a contract
2. To create a new Contract, please navigate to the appropriate project and go to the Expense Application
3. Select the **Contracts** tab, then click the **New** button to open a new Contract
4. Notice a new form on the right side of the screen
5. Leave the SOV Breakdown” and “Associate CO Lines to Contract Lines” boxes checked
6. Populate the Contract Details such as
  - Description, Type (for this guide please select PSC Agreement), IPHEC bulletin #
    - a. Use the Contract Execution date in the Date Field
    - b. Include enough Contract Name information in the title to help distinguish one contract from the other
7. Funding information will be entered by the Financial Manager later in this process
8. For the Retainer Contract add the CN# from Contracts+ for overall agreement
9. For the Retainer Wok Order add the University work order number
10. In the Parties section, please select the To Contact i.e. who the Contact should be on the Contract
  - a. After selecting the Contact, the Company Name and Office Name will populate automatically



- b. If multiple Company Offices exist, the single select drop down list will populate with the choices
11. In the Scope section please enter the Contract Amount, as it is a required field, and any other relevant information in the Scope of Work & Addenda fields
12. Internal Comments, Notes & References are also available to add more information
- a. **Note:** Internal Notes will not be shown to external vendors during the process
13. For the PSC Agreement please note the Items grid will not be editable to the Contract Specialist and can only be filled in during the process
14. Documents can be attached to the record under the References section. Upload an executed agreement from Contracts+ and any other supporting documentation. The user can either:

▼ SCOPE

\$ Contract Amount  
Field is required.

Scope of Work

Addenda

▼ REFERENCES

UPLOAD ADD KAHUA DOC EDIT MARKUP UPDATE REMOVE DOWNLOAD ADD COMPOSITE ADD APPROVAL DOC

<input type="checkbox"/>	↓ TYPE	DESCRIPTION	CONTRIBUTOR	DATE	SIZE	MARKUP?	INCLUDE ON SEND	INCLUDE MARKUP ON SEND	IS CURRENT	PREVIEW STATUS	COMMENTS
--------------------------	--------	-------------	-------------	------	------	---------	-----------------	------------------------	------------	----------------	----------

- a. Upload a document saved on their computer
- b. Add Kahua Doc to reference a document that is stored within Kahua's File Manager application
- c. Add Approval Doc which is used anytime a record is being routed for Review or Signature.
15. Once all details have been filled out, click Save/Close and then please click on **Submit to PSC**



## Contract Action Buttons

Once the fields within the record have been completed and saved, the users can select from several actions:

SEND	EDIT	DELETE	HISTORY
------	------	--------	---------

- **Send** – Use messaging to send record details to others (NOT to be confused with a workflow)
- **Edit** – Update and maintain the record
- **Delete** – Select this action button to delete a record (typically permission based, so all may not see this)
- **History** – All updates/changes are tracked

### Send

- Do not confuse **Send** with using the workflow buttons in any application
- Documents can be sent via a message within Kahua to either existing Kahua users or users outside of Kahua by entering their email address and clicking **Enter**
- The documents are treated as attachments, and the message can be copied to the **Communications** application by checking the box

### Edit

- The record can be updated as needed during the process
- If the document is out for Review or Signature, **Edit** will not be available

### History


- The **History** action button provides details regarding all activity (Creation, Updates, Saves, etc.) performed on the record
- To see specific details related to the updates made, click the View Edit button



## PSC Step of PSC Agreement

1. The To Contract in the Parties section will receive a Task & email notification where they can add the Contract/Agreement line items by:
  - a. Clicking the View Source Record
  - b. Click Edit
2. The PSC can now fill out the:
  - a. Scope of Work
  - b. Dates
  - c. Contract Items (Items Grid)
  - d. AE Subconsultant Information
  - e. AE Hourly Rate Schedule
  - f. Attach the Universities Input Worksheet
  - g. Comments & References


## **Adding Items**

1. To add Contract line items, navigate to the Items grid
  - a. To add multiple line items, determine how many lines you will need and click Insert
  - b. Select the applicable cost codes and fill out the remaining details regarding this record
2. To view the Contract Items in further detail, click the more details  icon next to the Item number
  - a. This view allows for additional detail on the item such as the Scope of Work, Notes, and additional Comments
  - b. Use the Previous and Next action buttons to sort through the Items if needed
3. Click Done once details have been added



4. **Note:** The Items total must be **EQUAL** to the Contract Amount defined in the Scope

## ***Adding AE Subconsultant Information***


1. To add Subs, navigate to the AE Subconsultant grid
  - a. To add multiple line items, determine how many lines you will need and click Insert
2. Select the Subs
  - a. **Note:** only those Subs available in the University of Illinois Companies will be available in this list
3. Select the appropriate Diversity Status or Veteran Status
  - a. The information visible is being pulled from the Classification column of the Certifications Table for the Company
4. The Approved Subcontract Total
5. Any Comments
6. The Tier of the Sub & the Responsible To
  - a. All Subs are Tier 2 as they are associated with the Primary A/E
  - b. Any Tier 3 Subs can then be associated with Responsible To Tier 2 Subs, similarly for Tier 4
7. IPHEC Approval Status cannot be edited by the PSC
8. To upload Sub specific documents please click on this  icon next to the Sub and you will see the References section for that Sub
  - a. The documents uploaded will populate the Ref Count

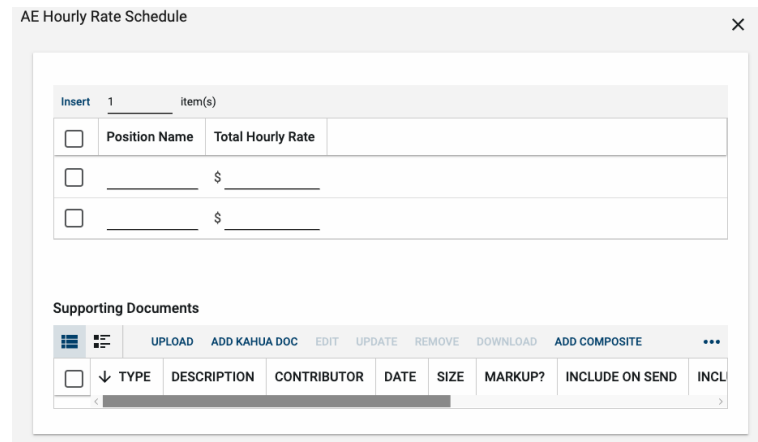


## Adding AE Hourly Rate Schedule

1. To add the Hourly Rates, navigate to the AE Hourly Rate Schedule grid
  - a. To add multiple line items, determine how many lines you will need and click

Insert

2. Select the Vendor for each line added
3. To add the Hourly Rates per Vendor,  
click on the  icon next to the Vendor and this will open a new screen
4. Enter the Position Name and the Total Hourly Rates
5. Add any Supporting Documents to the Supporting Documents Grid



AE Hourly Rate Schedule

Insert 1 item(s)

<input type="checkbox"/>	Position Name	Total Hourly Rate
<input type="checkbox"/>		\$
<input type="checkbox"/>		\$

Supporting Documents

<input type="checkbox"/>	TYPE	DESCRIPTION	CONTRIBUTOR	DATE	SIZE	MARKUP?	INCLUDE ON SEND	INCL

- a. Also attach a completed Input Worksheet
6. Once finished click Done located at the top right of the screen
  7. The information entered will populate the Position Count and Ref Count in the main table in the Record
  8. Add any additional Comments and References and once done either click Save/Close for future editing or click on **Submit to PM**

Position Count	Ref Count
2	1
3	2



## Project Manager Step of PSC Agreement

1. The Project Manager selected in the Project Details will receive a Task & email notification where they can update the IPHEC Approval Status:

- a. Clicking the View Source Record
- b. Click Edit

2. The Project Manager can now:

- a. Update Internal Notes
- b. Update the IPHEC Approval Status
- c. Add Comments
- d. Add additional References
- e. Review all Information

entered by the Contract

Specialist and the PSC in the previous steps

3. Once all information has been reviewed and the IPHEC Approval Status has been updated the Project Manager can click on the Save/Close to edit later or **Submit to FM button**

The screenshot displays the 'View Source Record' interface. At the top right, it shows 'Total \$100,000.00' and a '> SECTIONS' link. A sidebar on the right contains a menu with the following items: DETAILS (selected), PARTIES, SCOPE, INTERNAL NOTES, DATES & WORKFLOW, ITEMS, AE SUBCONSULTAN..., AE HOURLY RATE S..., COMMENTS, and REFERENCES. The main content area is titled 'DETAILS' and contains the following information:

Contract Number	0013
Date	2/19/2024
Description	Training Guide
Use SOV Breakdown	Yes
SOV	
Associate Change Order Lines to Contract Lines	Yes
Type	PSC Agreement
IPHEC bulletin #	
Assigned To	Data Migration
Workflow Status	PM Review
View Template	View Name: Contracts Template Name: Default



## Financial Manager Step of PSC Agreement

1. The Financial Manager selected in the Project Details will receive a Task & email notification where they can enter the Encumbrance Number, Charge Code & Account Code by:

- a. Clicking the View Source Record
- b. Click Edit

2. The Financial Manager can now:

- a. Add an Encumbrance Number
- b. Select a Charge Code from the ones entered in the Project details
- c. Add an Account Code
- d. Add additional References
- e. Review all Information entered by the Contract Specialist, the PSC and the Project Manager in the previous steps

The screenshot displays the 'View Source Record' interface. At the top right, it shows 'Total \$100,000.00' and a '> SECTIONS' link. A sidebar on the right contains a list of sections: DETAILS (selected), PARTIES, SCOPE, DATES & WORKFLOW, ITEMS, AE SUBCONSULTAN..., AE HOURLY RATE S..., COMMENTS, and REFERENCES. The main area is titled 'DETAILS' and contains a table of contract information.

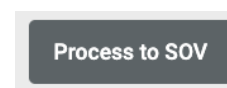
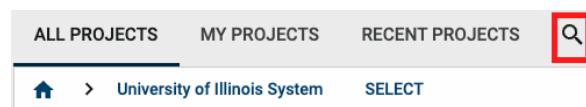
Contract Number	0013
Date	2/19/2024
Description	Training Guide
Use SOV Breakdown	Yes
SOV	
Associate Change Order Lines to Contract Lines	Yes
Type	PSC Agreement
Encumbrance Number	
Charge Code	
Account Code	
IPHEC bulletin #	
Assigned To	Data Migration
Workflow Status	FM Review
View Template	View Name: Contracts Template Name: Default

3. Once all information has been reviewed, the Financial Manager can click on the **Approve** Button which will Approve the Contract as the Financial Manager is the last step of this process



## On Approval of PSC Agreement

1. Once the PSC Agreement has been approved the PSC and Project Manager, they and the Risk Manager (selected in the Project Details), will receive an email & Kahua notification letting them know that the PSC Agreement/Contract has been Approved
  - a. The Project Manager & Financial Manager can edit the details section of the contract after approval
2. The PSC selected in the To Parties section will receive an additional notification letting them know that they can navigate to the Contract in the Contracts Application in Kahua and start the entry of the Schedule of Values
3. To do this please navigate using the Project Finder by:
  - a. Clicking on Project Finder in the left side Navigation
  - b. Selecting the Project where the Contract was created
4. You can also use the Search functionality in the Project Finder to locate you project by:
  - a. Clicking on Project Finder in the left side Navigation
  - b. Clicking on the Magnifying Glass icon next to Recent Projects, as shown in the image below
  - c. Type out the Project Name and click on the Project
5. Once in the project go to the Expense Application by click on Applications and then searching for Expenses using the Search Bar
6. Select the Contracts, then click on the Approved contract
  - a. The Contract will open on the right side of the screen
7. Please click on the Process to SOV located at the bottom of the Contract
  - a. On click it will automatically navigate the PSC to the SOV application in Kahua where the Schedule of Values can be entered and broken down
8. Please refer to the SOV Guide on how to use the SOV Application





## **Resources**

For additional help with Kahua applications please reach out to the Technical team of the University with any questions

Submit a [Support Request](#) or email at [servicedesk@uillinois.edu](mailto:servicedesk@uillinois.edu)

UIC: (312) 996-4806

UIS and UIUC: (217) 333-3102