

Processing Amendments for PCM & Real Estate - Contract Administrators

This job aid covers how to process an **Amendment** to a contract generated in Contracts+ or a contract imported from iCS.

Contract amendments are created when you need to update an approved and active contract, and the changes will affect the terms and conditions of the contract.

On contract amendments, data from the previous contract is copied into the amendment. The **Contract Number** and **Contract Type** values are locked and cannot be changed, but all other fields can be updated on the amendment.

If a **contract template** is selected when creating a contract amendment, settings from the template are copied into the contract amendment if they do not affect values from the previous contract. **Values on the previous contract have priority**. If there is a discrepancy, values from the previous contract supersede values from the contract template.

Amendments in progress can be deleted and the contract will return to the last saved version of the approved contract. Once changes to the contract are complete, the amendment can be submitted for approval.

Receiving Amendment information

PCM Contract Administrator

Amendment information will be received on a Contract Request. That request only needs to be Approved. Do not select Create Contract. In the event you accidentally select Create Contract, you have the ability to delete it as long as you have not submitted it into the workflow.

NOTE: Use two iBuy tabs, one to review the Contract Request and the other to view the contract in question. To do this, within the iBuy screen, right click on the University of Illinois System heading and logo. Use the Open link in new tab option.

Real Estate Contract Administrator

Amendment information will be received outside of the system.

Processing an Amendment

1. Navigate to **Contracts > Contracts > Search Contracts**.
2. Search for and open the contract you want to amend. It must be in **Executed: In Effect** status.
3. In the top-right corner of the contract page, click the **Contract Actions** drop-down menu and select **Amend**. The **Amend Contract** window opens.

4. Complete these fields in the **Amend Contract** window, then click **Yes**:
 - a. Use Contract Template
 - i. Select **No**. This will copy over all data from the previous contract including the visibility settings into the amendment.
 - b. Include the latest Attachment versions?
 - i. Select **Yes** if you want to copy the latest version of contract attachments from the previous contract into the contract amendment.
 - ii. **NOTE:** If a contract template is selected and this field is set to Yes, the contract amendment will have the main document from the amendment template along with any other contract attachments on that template. In addition, it will bring over the Full Contract PDF/Fully Executed PDF and any attachments from the previous version other than the main document (as this is part of the Full Contract PDF/Fully Executed PDF).
 - iii. Select **No** if you do not want to include attachments from the previous contract.
 - c. The contract header of the amendment opens, containing information copied from the previous contract and from the contract template if one is selected. The Contract Number and Contract Type fields are locked and cannot be changed. The color of the bar at the top of the page has changed color and the Actions button is now Amendment Actions.
5. Determine if eSignature is going to be used or not. If using eSignature, please refer to that documentation for additional information.
6. Make changes to the contract fields as requested within amendment details.
 - a. If amending an iCS imported **PCM Contract Type**, review and update all required contract fields. These additional fields could include but not limited to:
 - i. **Standard Second Party**
 1. If the **Second Party** is not found in the system, a **Vendor Information Form/Non-Vendor Second Party Vendor Information Form** will need to be submitted. Once notified the party is in the system, select and proceed with amendment.
 - ii. **Deliverables/Work Product**
 - iii. **Fund**
 - iv. **Will you be using the Contract for Procurement of Supplies and Services template?**
 - v. **Sharing or transfer of personal data**
 - vi. **Services Provided on site at UI Hospital and Clinics (Chicago Only)**
 - vii. **Second Party Legal Structure**

- viii. **Foreign Entity Reporting section**
 - ix. **HIPAA section**
 - x. **GASB87 section**
- b. If amending an iCS imported **Real Estate Contract** Type, review and update all required contract fields. These additional fields could include but not limited to:
- i. **Standard Second Party**
 - 1. If the **Second Party** is not found in the system, a **Vendor Information Form/Non-Vendor Second Party Vendor Information Form** will need to be submitted. Once notified the party is in the system, select and proceed with amendment.
 - ii. **CFOAP**
 - iii. **Intergovernmental Agreement**
 - iv. **Foreign Entity Reporting section**
 - v. **GASB87 section**
 - vi. **Real Estate Information section**
7. Make changes to additional contract screens as needed.
- a. If amending any iCS imported contract, on the **Users and Contracts** tab:
 - i. Add your name in the **Contract Managers** section.
 - ii. Add the name of the individual who submitted the **CRF – Amendment** request in the **Stakeholders** section.
 - b. **NOTE:** To replace the main document with one from the library, go to the **Attachments** page and click the **Actions** button next to Main Document, then choose either **Unassign as Main Document** or **Delete**, so that there is no attachment designated as the main document. This will enable the **Upload Main Document** button and you can upload a new main document or template. Choosing either of these options means that any **text that has been customized on the current contract will be lost and replaced with the uploaded version.**
8. Review **Approvals** tab to confirm that all required fields have been populated and that the workflow does not contain **Invalid Data** or **Missing Approver**.
- a. **Invalid Data** means that the **Work Group** selection is incorrect or missing. The selection must match the **College Code** for the **Org** detailed.
 - b. **Missing Approver** means that the corresponding approval queue does not have approvers assigned. Do not submit contract into workflow rather contact **System Administrators**. The **Department** will be notified of the lack of approvers and advised of corrective actions.



- c. Once changes are complete and correct, click **Submit** for **Approval** to release the contract amendment into the contract approval workflow.