NC eProcurement
Advanced Modification

STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOLS
NORTH CAROLINA ePROCUREMENT PURCHASI
ONLINE SHOPPING STATEWIDE TERM CONTRACTS
ELECTRONIC VENDOR PORTAL HUB CERTIFIED V
QUOTE PUNCHOUT CATALOG
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Once a Contract Workspace (CW) has been **'Published,'** it can only be modified when a user with **'Project Owner'** capabilities initiates the **'Amendment'** process. Please note that **'Amendment'** within NC eProcurement Contracts should be understood as any of the four types of contract modifications available within the system and differs from the way in which the State defines "Amendment," usually referring to a document changing the terms of an original contract.

When users need to modify a CW, they will do so by creating an **'Amendment'** within the system. NC eProcurement Contracts supports multiple types of **'Amendments'** and most of them temporarily change the **'Status'** of the CW to **'Draft Amendment'** until the modification is finalized and the CW is once again **'Published'** to create a new version of the CW.
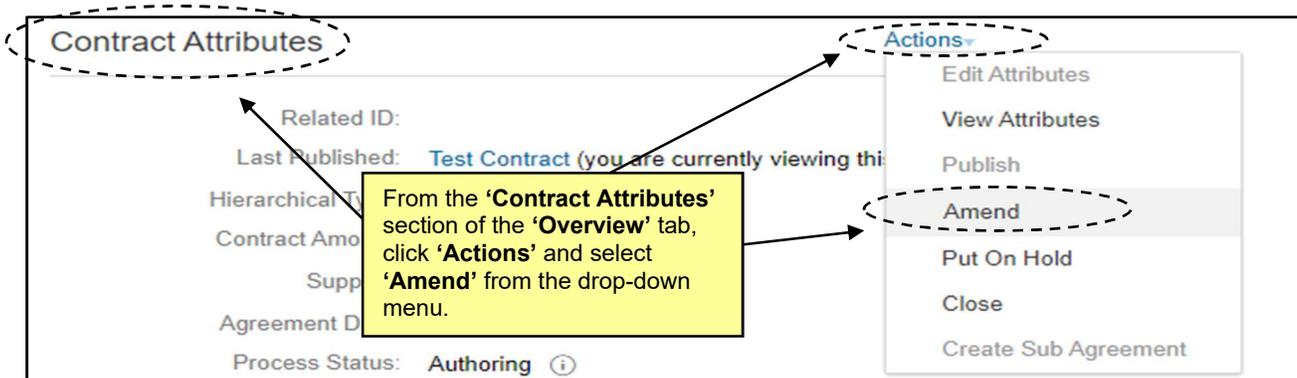
I. Types of 'Amendments'

There are four different types of **'Amendments'** available to **'Project Owners'** when they wish to modify a CW.

1. **'Administrative':** The most basic of CW modifications. This amendment allows the **'Project Owner'** to modify non-contract details such as adding a **'Team Member'** or uploading a supplemental document. No modifications are permitted to the actual contract or its terms. This **'Amendment'** type does not change the CW status to **'Draft Amendment,'** but rather it remains as **'Published.'**

2. **'Amendment':** Allows the **'Project Owner'** to modify any part of the CW such as the **'Commodity Code'** or the language of what the contract covers. Initiating this **'Amendment'** type will change the CW status to **'Draft Amendment'** and it will need to be **'Published'** again to reactivate.

3. **'Renewal':** Allows the **'Project Owner'** to modify the active dates of the contract, i.e., the '**Effective Date,'** **'Expiration Date,'** and any related reminder notifications in order to extend the life of a contract. Additional fields may also be editable in this **'Amendment.'** Initiating this **'Amendment'** type will change the CW status to **'Draft Amendment'** and it will need to be **'Published'** again to reactivate.

4. **'Termination':** Allows the **'Project Owner'** to modify the 'Expiration Date' to close a contract early due to an adverse condition or disagreement.

II. Initiating an 'Amendment'

1. On the **'Overview'** tab, scroll down to the **'Contract Attributes'** section and click **'Actions.'** From the ensuing drop-down menu, select **'Amend.'**
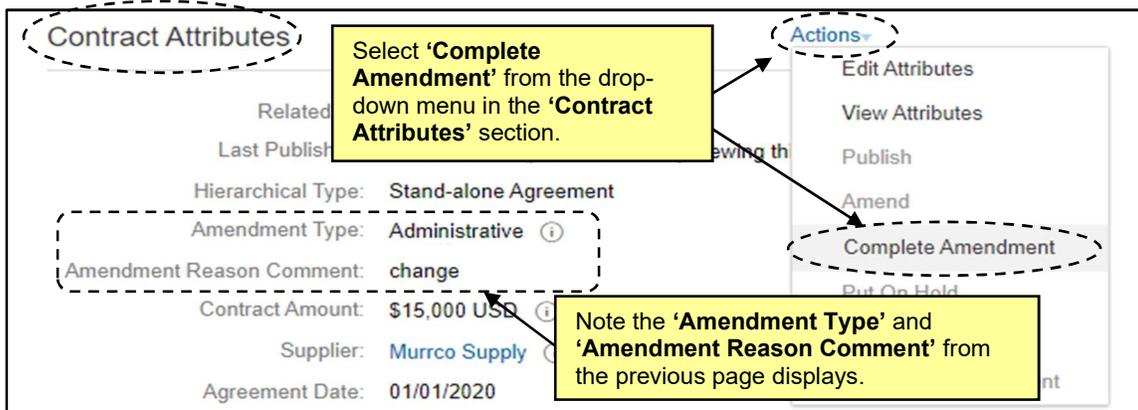
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2. On the next page, select the **'Amendment Type'** from the drop-down menu, leave the **'Upgrade Template Version'** radio-button set to **'No,'** and add a comment regarding the reason for the **'Amendment.'** Click **'OK'** and the **'Overview'** tab will display.

III. 'Administrative Amendment'

'Administrative Amendments' indicate a small administrative change and are limited in nature. The **'Contract Status'** of the Contract Workspace (CW) never changes from **'Published.'**

1. Make any necessary changes on the **'Overview'** tab, add a **'Team Member,'** or load an additional supporting document.

2. Return to the **'Overview'** tab (if the user had navigated away), scroll down to the **'Contract Attributes'** section, and click **'Actions.'** From the ensuing drop-down menu, select **'Complete Amendment.'** The CW is updated to a higher version and it remained in **'Published'** status throughout.

IV. 'Amendment Amendment'

'Amendment Amendments' allow the **'Project Owner'** to change any part of the project, including the actual terms of the contract.
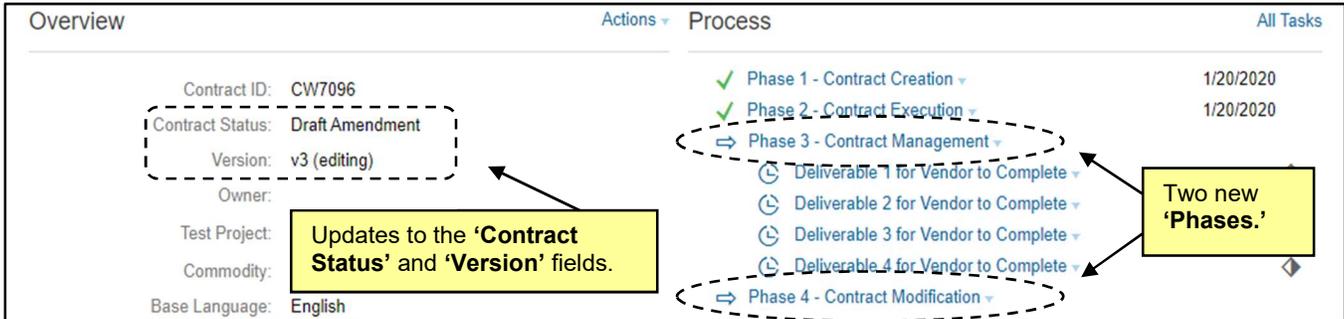
1. After selecting **'Amendment Amendment,'** the **'Overview'** tab will display. The **'Status'** field will be listed as **'Draft Amendment'** and the **'Version'** field will be listed as **'v2 (editing)'** [or v3/4/5, etc., depending on what number the previous **'Version'** was]. The user will also notice two additional

'Phases': 'Phase 3 – Contract Management,' and 'Phase 4 – Contract Modification' in the 'Process' section. 'Phase 4' will contain the new 'Tasks' for completing the modification.
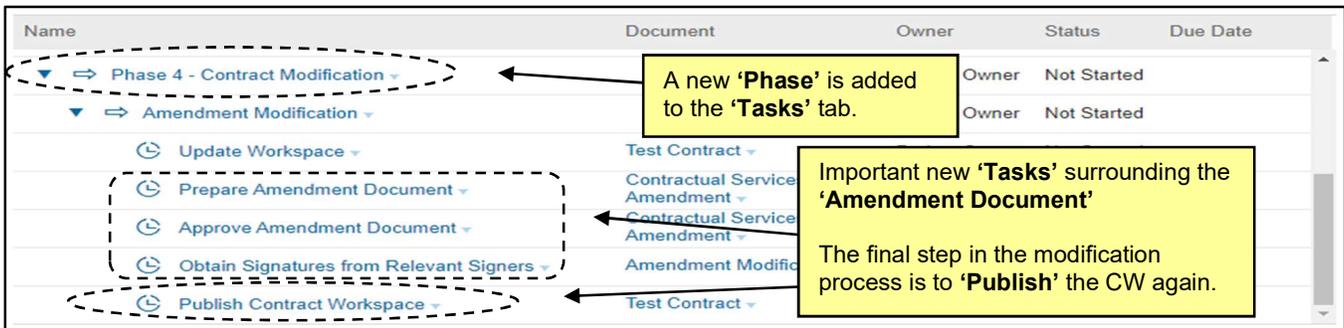
Note: While a CW is in a 'Status' of 'Draft Amendment,' all scheduled 'Expiration Notification' emails will be suspended until the modification is complete and the 'Status' goes back to 'Published.'

2. Navigate to the 'Tasks' tab and expand 'Phase 4 – Contract Modification' to display the pre-set 'Tasks' to guide the user through the modification process. All 'Tasks' are optional, but it is strongly advised that they be followed to limit the chance that any crucial steps are missed.

The most important part of the modification process will involve preparing, approving, and the signing of the 'Amendment Document,' a **MS Word** document summarizing the changes made to the contract.

The final step will be to 'Publish' the CW again to move it out of 'Draft Amendment' status.

3. Once all 'Tasks' have been completed and the 'Amendment Document' has been approved and signed, (See the 'Overview and Managing Tasks' and 'Managing Documents' sections of the 'Advanced Contract Workspace' Job Aid for more detailed guidance), return to the 'Overview' tab, click 'Actions' in the 'Contract Attributes' section, and select 'Publish' from the drop-down.

V. 'Renewal Amendment'

'**Renewal Amendments**' allow the '**Project Owner**' to change the active dates of the contract to extend it beyond its originally agreed-to '**Date of Expiration.**'

1. After selecting '**Renewal Amendment,**' the '**Overview**' tab will display. The '**Status**' field will be listed as '**Draft Amendment**' and the '**Version**' field will be listed as '**v2 (editing)**' [or v3/4/5, etc., depending on what number the previous '**Version**' was]. The user will also notice two additional '**Phases**': '**Phase 3 – Contract Management,**' and '**Phase 4 – Contract Modification**' in the '**Process**' section. '**Phase 4**' will contain the new '**Tasks**' for completing the modification.

   Note: While a CW is in a '**Status**' of '**Draft Amendment,**' all scheduled '**Expiration Notification**' emails will be suspended until the modification is complete and the '**Status**' goes back to '**Published.**'

2. Navigate to the '**Tasks**' tab and expand '**Phase 4 – Contract Modification**' to display the pre-set '**Tasks**' to guide the user through the modification process. All '**Tasks**' are optional, but it is strongly advised that they be followed to limit the chance that any crucial steps are missed.

   The '**Project Owner**' will update the CW '**Attributes**' to reflect the new dates and then receive '**Vendor Confirmation of Renewal**' from the supplier through a '**Task**' designed similarly to an '**Approval Task.**'

   The final step will be to '**Publish**' the CW again to move it out of '**Draft Amendment**' status.

3. For the '**Vendor Confirmation of Renewal Task,**' click on the '**Task**' and select '**View Task Details**' from the '**Action**' drop-down menu.

4. On the subsequent **'Approval Task'** page, click the down-arrow in the **'Select Approvers'** box and select **'Search More.'** Find the **'Supplier'** with which this contract exists, click the check box next to their entry, and add them to the **'Task'** by clicking **'Done.'**

5. Specify a **'Due Date'** and add a message for the **'Supplier'** explaining that a pre-negotiated contract renewal is being exercised. Click **'Submit'** to send an email to the **'Supplier'** requesting their confirmation.

Find the **'Supplier'** in the **'Select Approvers'** drop-down and add them to the **'Task.'** Specify a **'Due Date'** and add a message for the **'Supplier'** to inform them about the **'Renewal.'** Click **'Submit'** (not shown) to generate the email to the **'Supplier.'**

6. Once the **'Supplier'** has responded to the **'Vendor Confirmation of Renewal Task'** and all other updates and **'Tasks'** have been completed, return to the **'Overview'** tab, click **'Actions'** in the **'Contract Attributes'** section, and select **'Publish'** from the drop-down.

Select **'Actions'** from the drop-down menu in the **'Contract Attributes'** section.

VI. 'Termination Amendment'

'Termination Amendments' allow the **'Project Owner'** to close a contract before its originally agreed-to **'Date of Expiration'** in the event of an adverse condition or disagreement.

1. After selecting **'Termination Amendment,'** the **'Overview'** tab will display. The **'Status'** field will be listed as **'Draft Amendment'** and the **'Version'** field will be listed as **'v2 (editing)'** [or v3/4/5, etc., depending on what number the previous **'Version'** was]. The user will also notice two additional **'Phases':** **'Phase 3 – Contract Management,'** and **'Phase 4 – Contract Modification'** in the **'Process'** section. **'Phase 4'** will contain the new **'Tasks'** for completing the modification.

   Note: While a CW is in a **'Status'** of **'Draft Amendment,'** all scheduled **'Expiration Notification'** emails will be suspended until the modification is complete and the **'Status'** goes back to **'Published.'**
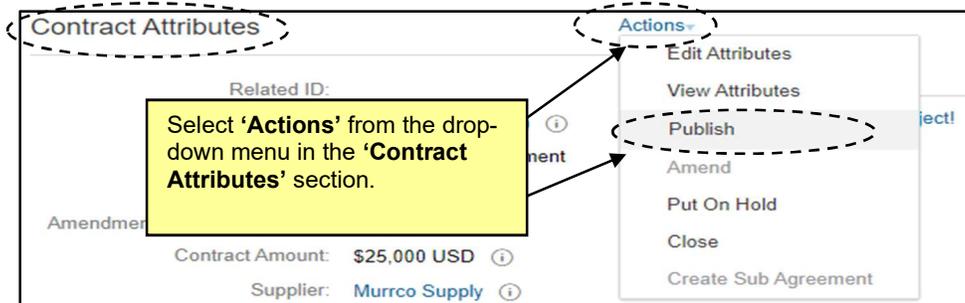

2. Navigate to the **'Tasks'** tab and expand **'Phase 4 – Contract Modification'** to display the pre-set **'Tasks'** to guide the user through the modification process. All **'Tasks'** are optional, but it is strongly advised that they be followed to limit the chance that any crucial steps are missed.

   The **'Project Owner'** will update the CW **'Attributes'** to reflect the new **'Expiration Date,'** prepare a **'Termination Letter,'** and get that letter approved. They will then notify the **'Supplier'** that the contract is being terminated early before printing and sending the **'Termination Letter'** to the **'Supplier'** via certified mail.

   Note: It is advised to scan and upload to the CW the certification of receipt for the **'Termination Letter'** or any other relevant communications with the **'Supplier'** regarding the early **'Termination'** of the contract.

   The final step will be to **'Publish'** the CW again to move it out of **'Draft Amendment'** status.

3. Once all **'Tasks'** have been completed and proof that the **'Supplier'** received the **'Termination Letter'** has been recorded, (See the **'Overview and Managing Tasks'** and **'Managing Documents'** sections of the **'Advanced Contract Workspace'** Job Aid for more detailed guidance), return to the **'Overview'** tab, click **'Actions'** in the **'Contract Attributes'** section, and select **'Publish'** from the drop-down.
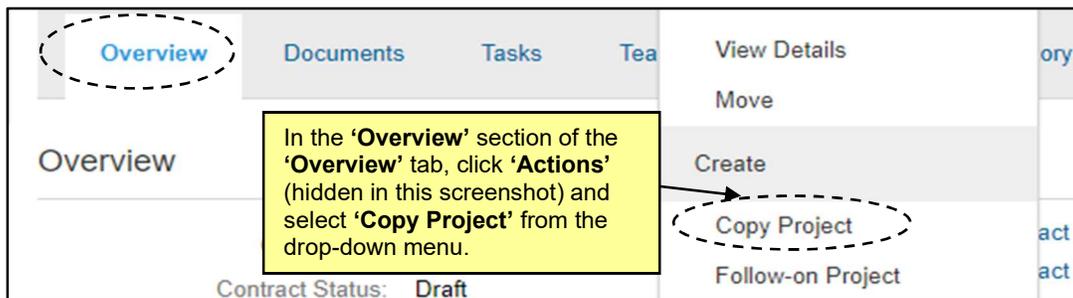

Select **'Actions'** from the drop-down menu in the **'Contract Attributes'** section.

Note: CWs will not expire immediately. The system needs to refresh on the new **'Expiration Date'** before the **'Status'** updates from **'Published'** to **'Expired.'**
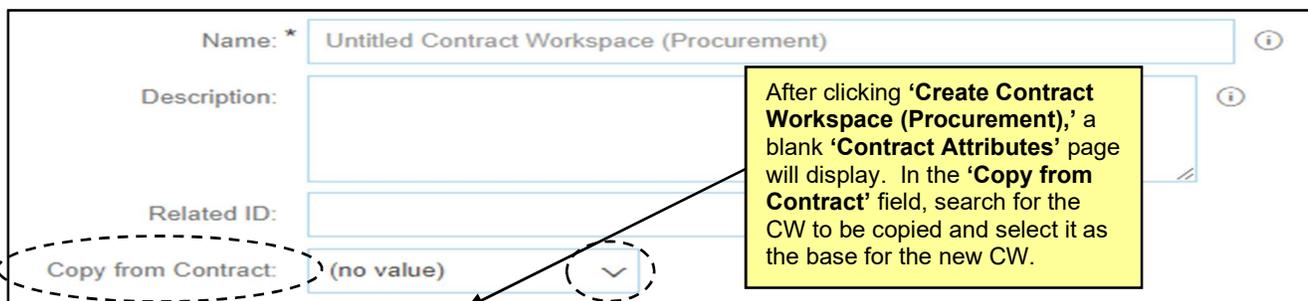
VII. Copying a Contract Workspace

When creating a new Contract Workspace (CW) that is similar to a previous CW, the **'Project Owner'** has the option to copy a previous CW.

1. There are two options to begin the process of copying a Contract Workspace:

    a. On the **'Overview'** tab of an existing CW, click **'Actions'** in the **'Overview'** section and select **'Copy Project'** on the drop-down menu.

In the **'Overview'** section of the **'Overview'** tab, click **'Actions'** (hidden in this screenshot) and select **'Copy Project'** from the drop-down menu.

    b. Click **'Create Contract Workspace (Procurement)'** and a blank **'Contract Attributes'** page will display. In the **'Copy from Contract'** field, click the down-arrow to search for the previous CW to copy and click **'Select'** to use it as basis for the new CW.

After clicking **'Create Contract Workspace (Procurement),'** a blank **'Contract Attributes'** page will display. In the **'Copy from Contract'** field, search for the CW to be copied and select it as the base for the new CW.

2. Certain **'Contract Attribute'** fields will auto-populate with information carried over from the CW that was copied, but not all fields. Notably, **'Name,' 'Description,' 'Test Project,' 'Agreement Date,'** and **'Expiration Date'** are required fields that will not auto-populate and must be manually entered before the **'Project Owner'** can click **'Create.'**

3. The **'Template'** type will auto-select based on the previous CW, but the **'Project Owner'** will have to answer the template questions again. Two additional questions will appear below the traditional template questions: **'Do you want to copy documents that were modified in the project being copied?'** and **'Do you want to copy project groups that were not in the template, from the project being copied?'** Both questions can be answered with either **'Yes'** or **'No'** from the drop-down menus. When all **'Contract Attribute'** fields are filled in and all questions are answered, click **'Create.'**

   Note: An answer of **'Yes'** to the documents question will bring any documents or folders created in the original CW over to the new CW. The status of the copied documents will be **'Draft'** regardless of their status in the previous CW.

   An answer of **'Yes'** to the project groups question will bring over any ad hoc groups or edited groups from the original CW, otherwise, only **'Template Project Groups'** as defined in the latest version of the **'Template'** will be carried over to the new **'Teams'** tab.

4. The new CW will be created and assigned a unique **'ID number,'** and the user will be taken to the **'Overview'** tab from which they can begin to manage the rest of the CW, eventually putting it into **'Published'** status.

VIII. Managing Multi-Vendor Contract Workspaces

If a **'Project Owner'** needs to create and link multiple Contract Workspaces (CW) for one contract with multiple **'Suppliers,'** it is advised they use the **'Copy'** feature.

Note: It is advised to copy a CW once the **'Solicitation Documents'** have been loaded in the original CW but before the remaining **'Tasks'** have been started. Assuming that one set of **'Solicitation Documents'** can be used for all **'Suppliers'** on the contract, these can be copied to each CW. The **'Project Owner'** will not want to bring the executed **'Contract Document'** from one **'Supplier'** over into a new CW for another **'Supplier,'** so complete each CW only once all root CWs have been copied and created for each **'Supplier.'**

1. Click **'Create Contract Workspace (Procurement)'** to create the initial CW.

2. Fill in all the **'Contract Attributes'** fields including the **'Statewide Contract ID'** field or **'Agency Contract ID'** field depending on the **'Contract Type.'**

3. Select a **'Template'** type and answer the template questions, then click **'Create.'**

4. Navigate to the **'Tasks'** tab, click on the **'Load Solicitation Documents for Reference'** Task, select **'View Task Details,'** and follow the steps to load all relevant **'Solicitation Documents.'**

5. At this point the CW is ready to be copied. Initiate the copy through one of the two options outlined above.

6. On the **'Contract Attributes'** page of the newly copied CW, populate all fields for which information did not auto-populate.

7. In the **'Supplier'** field, search for a different **'Supplier'** on this contract and replace the copied **'Supplier'** with that value.

8. Answer the template questions and select **'Yes'** to answer the question **'Do you want to copy documents that were modified in the project being copied?'** This will bring the **'Solicitation Documents'** over into the new CW. Click **'Create.'**

9. Repeat the process from this point as many times as there are unique **'Suppliers'** on the contract before executing any further **'Tasks'** on these linked CWs.