

Modifying a Contract Workspace (Non-IT)

Introduction

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 solicitation or contract.

When users need to modify a CW, they will do so by Modifying 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.



Learning Objectives

At the end of this job aid, **you will be able to:**



Understand the different types of Amendments and how to create them.



Manage Amendments within CW's created at different times with different templates.



Copy a Contract Workspace.

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Types of Amendments

- 1 There are four different types of **Amendments** available to **Project Owners** when they wish to modify a Contract Workspace (CW).
 - **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**.
 - **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. This will also be used for any **Extension** (not a renewal) of an existing contract, so the **Expiration Date** can be updated. Initiating this **Amendment** type will change the CW status to **Draft Amendment** and it will need to be **Published** again to reactivate.
 - **Renewal:** Allows the **Project Owner** to modify the **Expiration Date** based on any pre-negotiated renewal options built into the initial 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.
 - **Termination:** Allows the **Project Owner** to modify the **Expiration Date** to close a contract early due to an adverse condition or disagreement.

Initiating an Amendment

- 1 On the **Overview** tab, scroll down to the **Contract Attributes** section and click **Actions**.
 - A. From the ensuing drop-down menu, select **Amend**.

The screenshot shows the 'Contract Attributes' section of a system interface. It lists various contract details such as 'Related ID', 'Last Published', 'Hierarchical Type', 'Contract Amount', 'Supplier', 'Agreement Date', and 'Process Status'. To the right of these attributes is an 'Actions' dropdown menu. The 'Amend' option is highlighted and marked with a circled '1A', indicating the step to be taken.

- B. On the next page, select the **Amendment Type** from the drop-down menu and add a comment regarding the reason for the **Amendment**. Click **OK** and the **Overview** tab will display.

The screenshot shows the 'Amendment Type' selection screen. It features a dropdown menu with 'Amendment' selected, marked with a circled '1B'. Below the dropdown is a text input field labeled 'Amendment Reason Comment: *'. To the right of the input field is a large empty text area for providing details. The dropdown menu also shows other options: 'Renewal', 'Administrative', and 'Termination'.

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Administrative Amendment

1 An **Administrative Amendment** indicates a small administrative change and is limited in nature. The **Contract Status** of the Contract Workspace (CW) never changes from **Published**.

- A. After selecting **Administrative Amendment**, the **Overview** tab will display. The **Status** field will remain as **Published**. Make any necessary changes on the **Overview** tab, add a **Team Member**, or load an additional supporting document.
- B. Return to the **Overview** tab (if the user has 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.

Contract Attributes

Related ID: PR1234567

Last Published: Example Contract Workspace (you are currently viewing this)

Hierarchical Type: Stand-alone Agreement

Amendment Type: Administrative ⓘ

Amendment Reason Comment: Example Administrative Amendment

Contract Amount: \$50,000 USD ⓘ

Supplier: NC Test Supplier 083 ⓘ

Agreement Date: 12/01/2021

Actions 1B

- Edit Attributes
- View Attributes
- Publish
- Amend
- Complete Amendment 1B
- Put On Hold
- Close
- Create Sub Agreement

Amendment Amendment

1 An **Amendment Amendment** allows the **Project Owner** to change any part of the project, including the actual terms of the contract. This section details the **Amendment** option.

- A. 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 **v1 (editing)** [or v2/3/4, etc., depending on what number the previous **Version** was].

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**.

Overview

Contract ID: CW21496

Contract Status: Draft Amendment 1A

Last Published Date: 02/09/2022 ⓘ

Version: v2 (editing)

Owner: classroomtraining32 ⓘ

Test Project: No ⓘ

Commodity: 761115 - General building... View more

Base Language: English

Actions Process All Tasks

- Phase 1 - Contract Creation and Execution
- Phase 2 - Contract Management
 - Deliverable 1 for Vendor to Complete
 - Deliverable 2 for Vendor to Complete
 - Deliverable 3 for Vendor to Complete
 - Deliverable 4 for Vendor to Complete
- Phase 3 - Contract Modification

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- B. Navigate to the **Tasks** tab to view the newly-added phase (3) and tasks to help guide user through the amendment process. Clicking the blue arrow to the left of **Phase 3 – Contract Modification** will display a subsection titled **Amendment Modification**. Clicking the blue arrow to the left of that will reveal an **Amendment** subsection. Click the blue arrow to the left of the **Amendment** option to reveal the tasks associated with that type of modification.

Task Name	Workspace	Project Owner	Status
Phase 3 - Contract Modification		Project Owner	Not Started
Amendment Modification		Project Owner	Not Started
Amendment		Project Owner	Not Started
Update Workspace	Example Contract Workspace	Project Owner	Not Started
Prepare Amendment Document		Project Owner	Not Started
Approve Amendment Document	Amendment Modification	Project Owner	Not Started
Gain P&C Approval of Amendment Over Delegation	Amendment Modification	Project Owner	Not Started
Obtain Signatures from Relevant Signers	Amendment Modification	Project Owner	Not Started
Publish Contract Workspace	Example Contract Workspace	Project Owner	Not Started

- C. Update the CW by editing any field on the **Overview** tab needs to be changed, i.e., the **Description** or **Contract Amount**. If the contract being amended is now over the entity’s delegation, an additional **Approval Task** to **Gain P&C Approval of Amendment Over Delegation** will appear on the **Tasks** tab. If this is not the case, users can skip to **Step J**.

- D. The Project Owner must mark the **Update Workspace** task as “Complete” before initiating any other tasks in this phase. Click the **Update Workspace** task name and select **Mark Complete**.

- E. The **Gain P&C Approval of Amendment Over Delegation** task is tied to two documents on the **Documents** tab that must be downloaded, completed, and replaced before the task can be assigned to P&C for approval. Navigate to the **Documents** tab and click the blue arrow to the left of the **Modification Contract Documents** folder to reveal a sub-folder for **Amendment Modification**. Click the blue arrow to the left of the relevant option, and the documents will appear.

Document Name	Project Owner	Status
Contract Document	Project Owner	
Deliverable Documents	Project Owner	
Modification Contract Documents	Project Owner	
Amendment Modification	Project Owner	
Contract Amendment Template	Project Owner	Not Edited
Modification Request Template	Project Owner	Not Edited
Extension Modification	Project Owner	

- F. Click on each of the document templates and select **Download** from the popup menu. Update the documents accordingly and save a local copy. Click back on the templates, and this time select **Replace Document**. Add and save the updated versions of the **Contract Amendment Template** and the **Modification Request Template**.

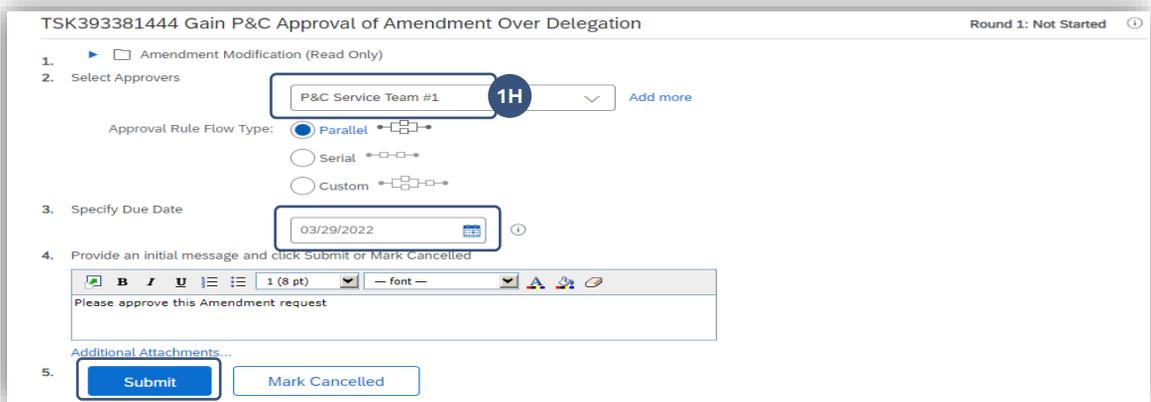
Document Name	Action	Project Owner	Status
Contract Document		Project Owner	
Deliverable Documents		Project Owner	
Modification Contract Documents		Project Owner	
Amendment Modification		Project Owner	
Contract Amendment Template	Download	Project Owner	Not Edited
Modification Request Template	Replace Document	Project Owner	Not Edited
Extension Modification		Project Owner	

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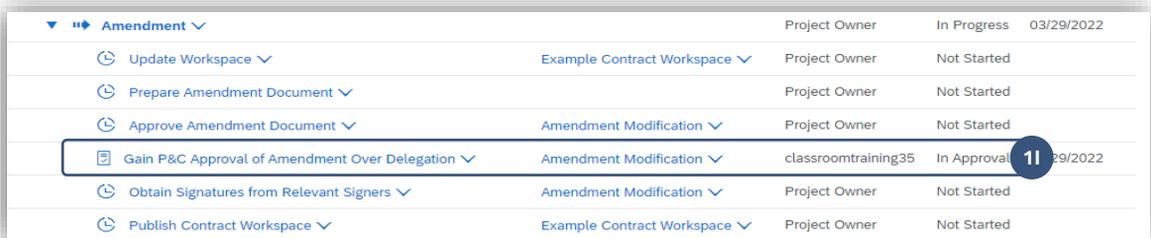
G. Navigate back to the **Tasks** tab and click on the **Gain P&C Approval of Amendment Over Delegation** task and select **View Task Details** from the drop-down.



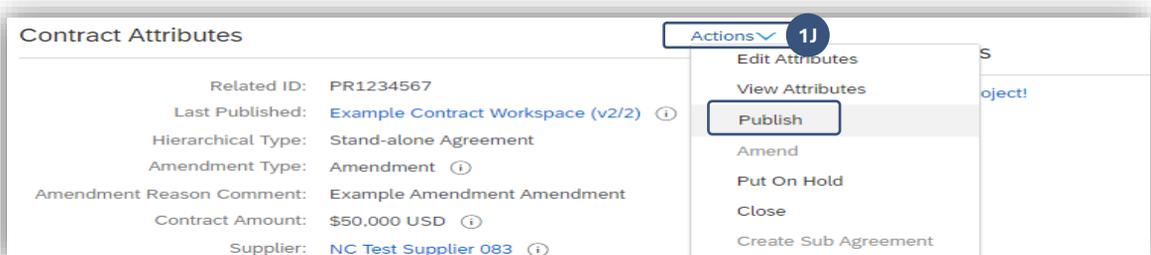
H. On the subsequent **Approval Task** page, the user should add their **P&C Service Team** to the **Select Approvers** field, set a **Due Date** with the date picker in the **Specify Due Date** field, enter a message if necessary, and click the **Submit** button to send the **Amendment** to P&C for approval.



I. After the task is submitted to P&C, the status will change to **In Approval** and the user will wait for P&C to approve the request allowing the user to proceed to the next steps, or P&C will **Deny** the task and request that the user adjust aspects of the CW and document and resubmit for approval. Once P&C provides final approval, the task **Status** will automatically update to **Approved**.



J. Once all requisite changes, approvals, and signatures have been completed, return to the **Overview** tab, click **Actions** in the **Contract Attributes** section, and select **Publish** from the drop-down. The CW will revert to **Published** status and cannot be edited until another **Amendment** is initiated



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Extension Amendment

1 If the user wishes to negotiate an **Extension** to a current contract, they will select an **Amendment** from the **Amendment Type** dropdown. This section details the **Extension** option.

A. 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 **v1 (editing)** [or v2/3/4, etc., depending on what number the previous **Version** was.

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**.

Overview

Contract ID: CW21496

Contract Status: Draft Amendment 1A

Last Published Date: 1/2/2022

Version: v2 (editing)

Owner: classroomtraining32

Test Project: No

Commodity: 761115 - General building... View more

Base Language: English

Process

- Phase 1 - Contract Creation and Execution
- Phase 2 - Contract Management
 - Deliverable 1 for Vendor to Complete
 - Deliverable 2 for Vendor to Complete
 - Deliverable 3 for Vendor to Complete
 - Deliverable 4 for Vendor to Complete
- Phase 3 - Contract Modification

B. Navigate to the **Tasks** tab to view the newly-added phase (3) and tasks to help guide user through the amendment process. Clicking the blue arrow to the left of **Phase 3 – Contract Modification** will display a subsection titled **Amendment Modification**. Clicking the blue arrow to the left of that will reveal an **Amendment** subsection. Click the blue arrow to the left of the **Amendment** option to reveal the tasks associated with that type of modification.

Phase 3 - Contract Modification

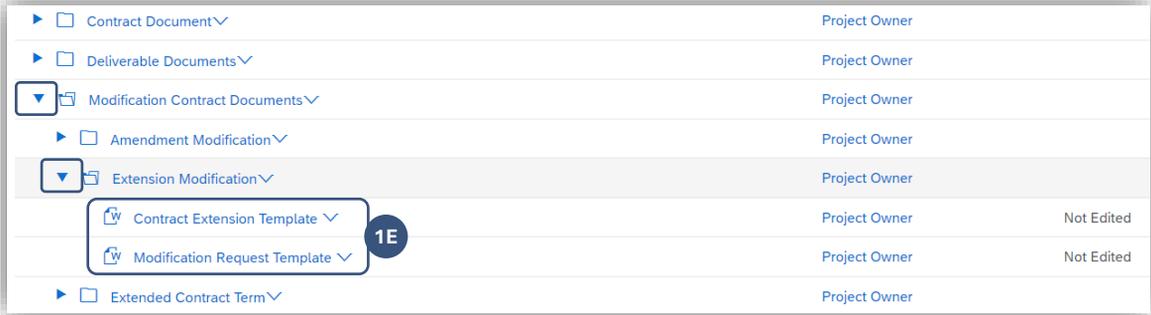
- Amendment Modification
 - Amendment
 - Update Workspace 1D
 - Prepare Amendment Document
 - Approve Amendment Document
 - Gain P&C Approval of Amendment Over Delegation
 - Obtain Signatures from Relevant Signers
 - Publish Contract Workspace

C. Update the CW by editing any field on the **Overview** tab needs to be changed, i.e., the **Description** or **Contract Amount**. If the contract being amended is now over the entity's delegation, an additional **Approval Task** to **Gain P&C Approval of Amendment Over Delegation** will appear on the **Tasks** tab. If this is not the case, users can skip to **Step J**.

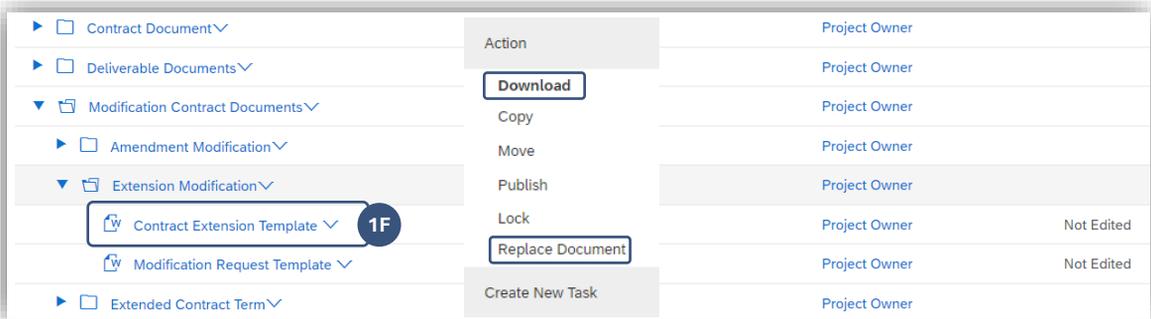
D. The Project Owner must mark the **Update Workspace** task as "Complete" before initiating any other tasks in this phase. Click the **Update Workspace** task name and select **Mark Complete**.

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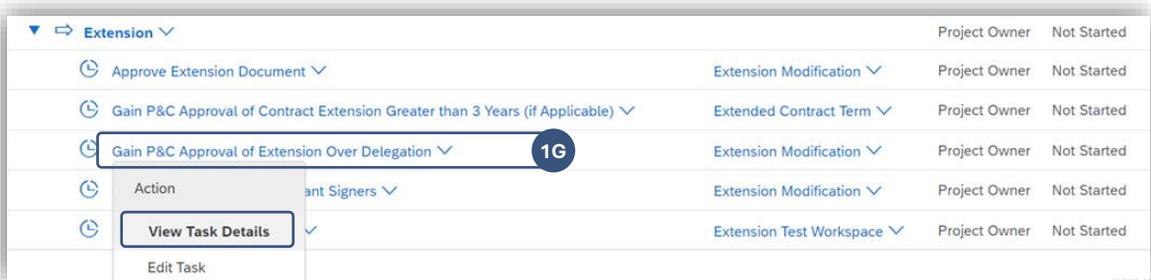
E. The **Gain P&C Approval of Extension Over Delegation** tasks are tied to two documents on the **Documents** tab that must be downloaded, completed, and replaced before the task can be assigned to P&C for approval. Navigate to the **Documents** tab and click the blue arrow to the left of the **Modification Contract Documents** folder to reveal the **Extension Modification** sub-folder. Click the blue arrow to the left of that folder and the documents will appear



F. Click on each of the document templates and select **Download** from the popup menu. Update the documents accordingly and save a local copy. Click back on the templates, and this time select **Replace Document**. Add and save the updated versions of the **Contract Extension Template** and the **Modification Request Template**.



G. Navigate back to the **Tasks** tab and click on the **Gain P&C Approval...** task and select **View Task Details** from the drop-down.



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H. On the subsequent **Approval Task** page, the user should add their **P&C Service Team** to the **Select Approvers** field, set a **Due Date** with the date picker in the **Specify Due Date** field, enter a message if necessary, and click the **Submit** button to send the **Extension** to P&C for approval.

TSK392221579 Gain P&C Approval of Extension Over Delegation Round 1: Not Started

- ▶ Extension Modification (Read Only)
- Select Approvers
 - P&C Service Team #1 1H Add more
 - Approval Rule Flow Type:
 - Parallel
 - Serial
 - Custom
- Specify Due Date
 - 03/29/2022
- Provide an initial message and click Submit or Mark Cancelled
 - B I U - size - - font -

Please approve this Extension request
 - Additional Attachments...
- Submit
Mark Cancelled

All **Extension** modifications will include a **Gain P&C Approval of Contract Extension Greater than 3 Years (if Applicable)** task tied to a document in the **Extended Contract Term** folder in the **Modification Contract Documents** folder. The task and documents can be ignored if the **Extension** is not greater than three years, but if it is, this task should be submitted to P&C for approval **BEFORE** beginning the traditional Extension Approval task outlined above.

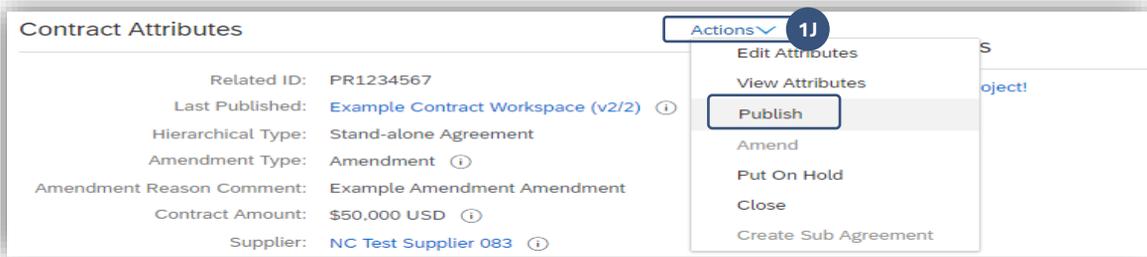
I. After the task is submitted to P&C, the status will change to **In Approval** and the user will wait for P&C to approve the request allowing the user to proceed to the next steps, or P&C will **Deny** the task and request that the user adjust aspects of the CW and document and resubmit for approval. Once P&C provides final approval, the task **Status** will automatically update to **Approved**.

▶ Amendment Modification		Project Owner	In Progress	12/22/2023
▶ Amendment		Project Owner	In Progress	
▶ Extension		Project Owner	In Progress	12/22/2023
🕒 Document Factors for Extension		Project Owner	Not Started	
🕒 Update Workspace	Extension Test Workspace	Project Owner	Not Started	
🕒 Prepare Extension Document		Project Owner	Not Started	
🕒 Approve Extension Document	Extension Modification	Project Owner	Not Started	
🕒 Gain P&C Approval of Contract Extension Greater than 3 Years (if Applicable)	Extended Contract Term	Project Owner	Not Started	
🕒 Gain P&C Approval of Extension Over Delegation	Extension Modification	classroomtraining53	In Approval	11 2/2023
🕒 Obtain Signatures from Relevant Signers	Extension Modification	Project Owner	Not Started	
🕒 Publish Contract Workspace	Extension Test Workspace	Project Owner	Not Started	

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J. Once all requisite changes – including an updated **Expiration Date** if an extension was agreed to – approvals, and signatures have been completed, and the executed **Extension** document has been uploaded to the Contract Workspace, return to the **Overview** tab, click **Actions** in the **Contract Attributes** section, and select **Publish** from the drop-down. The CW will revert to **Published** status and cannot be edited until another **Amendment** is initiated.

Contract Extensions automatically post to eVP when the CW is back in **Published** status. The automated posting process runs once per evening (as opposed to immediately for solicitations), so check back the next day to make sure it transferred as expected.



Renewal Amendment

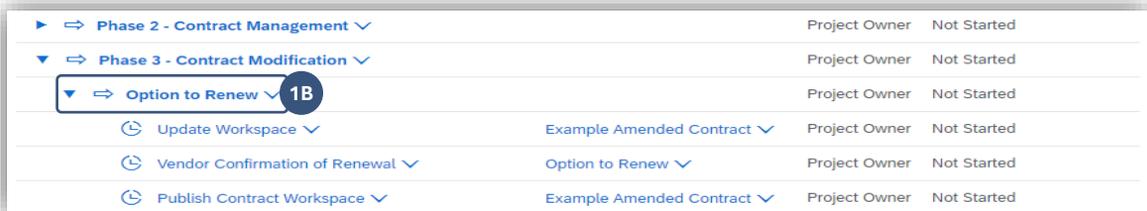
1 A **Renewal Amendment** allows the **Project Owner** to change the active dates of the contract to extend it beyond its originally agreed-to **Date of Expiration**. Renewals do not need additional P&C approval because the optional additional term was approved during the original contract negotiation process.

A. 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 **v1 (editing)** [or v2/3/4, etc., depending on what number the previous **Version** was].

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**.

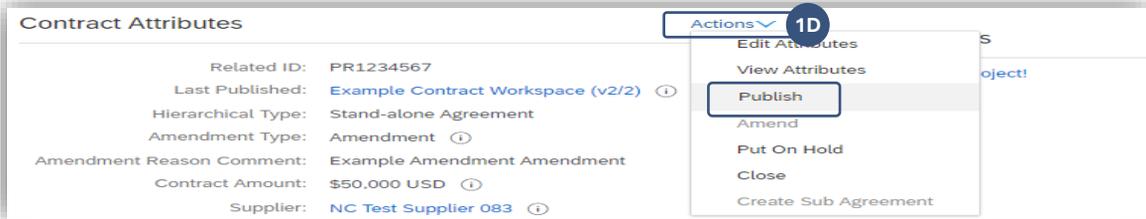


B. Navigate to the **Tasks** tab to view the newly-added phase (3) and tasks to help guide user through the renewal process. Clicking the blue arrow to the left of **Phase 3 – Contract Modification** will display a subsection titled **Option to Renew**. Clicking the blue arrow to the left of that will reveal the tasks associated with the renewal process.



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- C. As with the **Tasks** in the first two phases associated with the initial creation of the Contract Workspace, the tasks themselves are not required to be completed to finalize a modification, but rather are intended to serve as a road map for best practices. Additionally, an **Option to Renew** folder will be added to the newly-created **Modification Contract Documents** folder on the **Documents** tab in which users will find a **Contract Renewal Template** that can be used to notify the vendor that the renewal option is being exercised.
- D. Once all requisite changes have been made – such as adjusting the expiration date – and any new documents have been added, return to the **Overview** tab, click **Actions** in the **Contract Attributes** section, and select **Publish** from the drop-down. The CW will revert to **Published** status and cannot be edited again until another **Amendment** is initiated



Termination Amendment

1 A **Termination Amendment** allows the **Project Owner** to close a contract before its originally agreed-to **Date of Expiration** in the event of an adverse condition or disagreement.

- A. 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 **v1 (editing)** [or v2/3/4, etc., depending on what number the previous **Version** was].

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**.



- B. Navigate to the **Tasks** tab to view the newly-added phase (3) and tasks to help guide user through the termination process. Clicking the blue arrow to the left of **Phase 3 – Contract Modification** will display a subsection titled **Termination Modification**. Clicking the blue arrow to the left of that will reveal the tasks associated with the termination process.



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- C. Update the CW by editing any field on the **Overview** tab needs to be changed, i.e., the **Contract Amount** and the **Expiration Date**. If the contract being extended is now over the entity’s delegation, an additional **Approval Task to Gain P&C Approval of Termination Over Delegation** will appear on the **Tasks** tab. If this is not the case, users can skip to **Step J**.
- D. The Project Owner must mark the **Update Workspace** task as “Complete” before initiating any other tasks in this phase. Click the **Update Workspace** task name and select **Mark Complete**.
- E. The **Gain P&C Approval of Termination Over Delegation** task is tied to three documents on the **Documents** tab that must be downloaded, completed, and replaced before the task can be assigned to P&C for approval. Navigate to the **Documents** tab and click the blue arrow to the left of the **Modification Contract Documents** folder to reveal the **Termination Modification** folder. Click the blue arrow to the left of that folder and the documents will appear.
- F. Click on each of the templates and select **Download** from the popup menu. Update the documents accordingly and save a local copy. Click back on the templates, and this time select **Replace Document**. Add and save the updated versions to the **Termination Modification** folder.

Document Name	Action	Project Owner	Status
Contract Document	Download	Project Owner	
Deliverable Documents	Copy	Project Owner	
Modification Contract Documents	Move	Project Owner	
Termination Modification	Publish	Project Owner	
Contract Termination Request Template	Lock	Project Owner	Not Edited
Request to Cure Notice Template	Replace Document	Project Owner	Not Edited
Termination Letter Template	Create New Task	Project Owner	Not Edited

- G. Navigate back to the **Tasks** tab and click on the **Gain P&C Approval of Termination Over Delegation** task and select **View Task Details** from the drop-down.

Task Name	Task Details	Project Owner	Status
Update Workspace	Example Terminated Contract	Project Owner	Not Started
Prepare Termination Letter	Termination Letter	Project Owner	Not Started
Approve Termination Letter	Termination Modification	Project Owner	Not Started
Gain P&C Approval of Termination Over Delegation	Termination Modification	Project Owner	Not Started
Send to the Vendor	Termination Letter	Project Owner	Not Started
View Task Details	Example Terminated Contract	Project Owner	Not Started

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- H. On the subsequent **Approval Task** page, the user should add their **P&C Service Team** to the **Select Approvers** field, set a **Due Date** with the date picker in the **Specify Due Date** field, enter a message if necessary, and click the **Submit** button to send the **Termination Letter** to P&C for approval.

TSK392331481 Gain P&C Approval of Termination Over Delegation Round 1: Not Started

- Termination Modification (Read Only)
- Select Approvers
 - P&C Service Team #1 1H Add more
- Specify Due Date
 - 03/29/2022 i
- Provide an initial message and click Submit or Mark Cancelled
 - Additional Attachments...

B **I** **U** **---** 1 (8 pt) **---** font **A** **---**

Please approve the Termination documents
- Submit Mark Cancelled

- I. After the task is submitted to P&C, the status will change to **In Approval** and the user will wait for P&C to approve the request allowing the user to proceed to the next steps, or P&C will **Deny** the task and request that the user adjust aspects of the CW and document and resubmit for approval. Once P&C provides final approval, the task **Status** will automatically update to **Approved**.

Task Name	Task ID	Project Owner	Status	Due Date
Update Workspace	Example Terminated Contract	Project Owner	Not Started	
Prepare Termination Letter	Termination Letter Draft	Project Owner	Not Started	
Approve Termination Letter	Termination Modification	Project Owner	Not Started	
Gain P&C Approval of Termination Over Delegation	Termination Modification	classroomtraining32	In Approval	03/21/2022 1I
Print Termination Letter and Send to the Vendor	Termination Letter Draft	Project Owner	Not Started	
Publish Contract Workspace	Example Terminated Contract	Project Owner	Not Started	

- J. Once all requisite changes – including an updated **Expiration Date** – approvals, and signatures have been completed, return to the **Overview** tab, click **Actions** in the **Contract Attributes** section, and select **Publish** from the drop-down. The CW will revert to **Published** status and cannot be edited again unless another **Amendment** is initiated.

CWs will not expire immediately. The system needs to refresh on the new **Expiration Date** before the **Status** updates from **Published** to **Expired**.

Contract Attributes

- Related ID: PR1234567
- Last Published: [Example Contract Workspace \(v2/2\)](#) i
- Hierarchical Type: Stand-alone Agreement
- Amendment Type: Amendment i
- Amendment Reason Comment: Example Amendment Amendment
- Contract Amount: \$50,000 USD i
- Supplier: [NC Test Supplier 083](#) i

Actions 1J

- Edit Attributes
- View Attributes
- Publish
- Amend
- Put On Hold
- Close
- Create Sub Agreement

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Multiple Contract Amendments

- 1 Depending on when a Contract Workspace (CW) was created, the process for managing multiple modifications with the same amendment type will differ. If a CW was created **BEFORE May 2024**, new tasks and document templates will NOT appear for subsequent modifications as they did for the first. If a CW was created **AFTER May 2024**, new tasks will generate, but new document templates will NOT appear for subsequent modifications as they did for the first. This section will provide separate guidance for each situation.

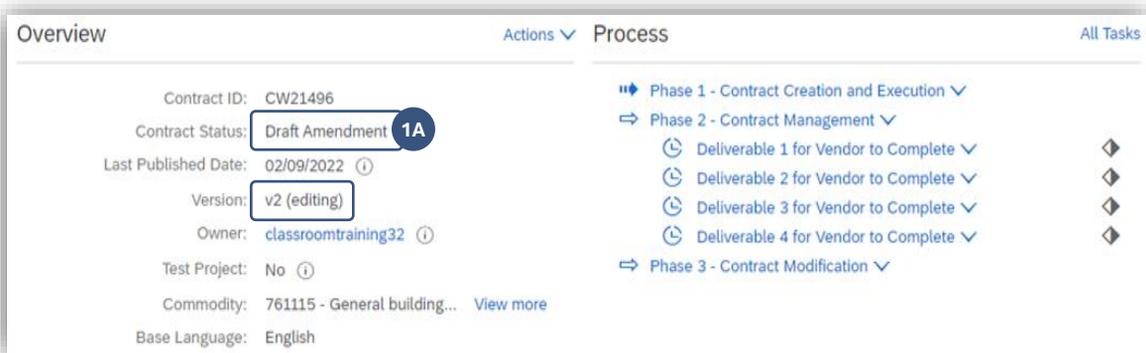
Contract Workspaces created BEFORE May 2024 – New Tasks and Documents will NOT generate:

- A. If a **Project Owner** selects an **Amendment Type** that was NOT the selection in a previous modification (i.e., the first modification was a **Renewal Amendment** and the current modification is an **Amendment Amendment**), a new set of tasks and document templates will populate in the CW and the **Project Owner** can proceed as instructed above per the **Amendment Type** selected.
- B. If a **Project Owner** selects an **Amendment Type** that IS the same selection as a previous modification (i.e., the first modification was an **Amendment Amendment** and the current modification is, too), a new set of tasks and document templates will NOT populate in the CW and the **Project Owner** will use the existing **Contract Modification** tasks and **Modification Contract Documents** folders to process their approval requests.

 Project Owners can create a **Follow-on Project** from their existing CW if they wish to request their duplicate modification approval in the newer version of the CW template. This is not necessary, but please see the [Modifying a Legacy Contract Workspace](#) job aid for further guidance on that process if preferred.

- C. After selecting an **Amendment Type** that was previously processed (for this example, we will demonstrate a second **Extension** via an **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].

 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**.



The screenshot shows the 'Overview' tab of a Contract Workspace. Key details include: Contract ID: CW21496; Contract Status: Draft Amendment (with a '1A' badge); Last Published Date: 02/09/2022; Version: v2 (editing); Owner: classroomtraining32; Test Project: No; Commodity: 761115 - General building...; Base Language: English. The 'Process' section shows a list of deliverables: Phase 1 - Contract Creation and Execution, Phase 2 - Contract Management, and Phase 3 - Contract Modification, with four deliverables listed under Phase 2.

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D. Navigate to the **Tasks** tab and note that a new version of the duplicated **Phase 3 – Contract Modification** does NOT generate. The existing task list will include a **Gain P&C Approval of XXX Over Delegation** task in **Approved** status.

▶ ▶▶ Phase 1 - Contract Creation and Execution		Project Owner	In Progress
▶ ⇄ Phase 2 - Contract Management		Project Owner	Not Started
▼ ✓ Phase 3 - Contract Modification		Project Owner	Complete 03/15/2024
▼ ✓ Amendment Modification		Project Owner	Complete 03/15/2024
▶ ▶▶ Amendment		Project Owner	In Progress
▼ ✓ Extension		Project Owner	Complete 03/15/2024
🕒 Document Factors for Extension		Project Owner	Not Started
🕒 Update Workspace	Example Contract Workspace	Project Owner	Not Started
🕒 Prepare Extension Document		Project Owner	Not Started
🕒 Approve Extension Document	Extension Modification	Project Owner	Not Started
🕒 Gain P&C Approval of Contract Extension Greater than 3 Years (if Applicable)	Extended Contract Term	Project Owner	Not Started
✓ Gain P&C Approval of Extension Over Delegation	Extension Modification	classroomtraining55	Approved 1D 5/2024
🕒 Obtain Signatures from Relevant Signers	Extension Modification	Project Owner	Not Started
🕒 Publish Contract Workspace	Example Contract Workspace	Project Owner	Not Started

E. Update the CW by editing any field on the **Overview** tab needs to be changed, i.e., the **Contract Amount** and the **Expiration Date**.

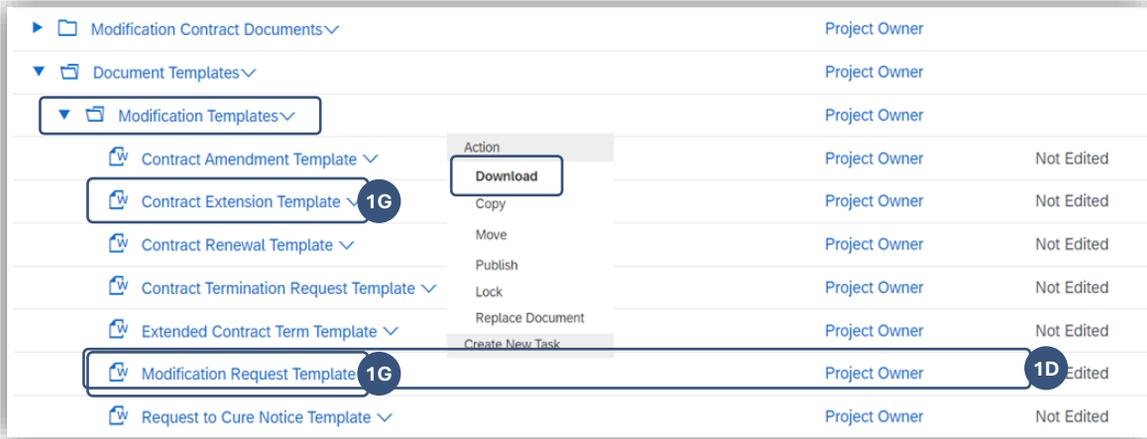
F. Navigate to the **Documents** tab and note that new versions of the duplicated modification template documents do NOT generate. The previously submitted documents will remain in the folder.

▶ 📁 Contract Document		Project Owner	
▶ 📁 Deliverable Documents		Project Owner	
▼ 📁 Modification Contract Documents		Project Owner	
▶ 📁 Amendment Modification		Project Owner	
▼ 📁 Extension Modification		Project Owner	
📄 Agency Contract Extension		Project Owner	Published
📄 Agency Modification Request		Project Owner	Published
▶ 📁 Extended Contract Term		Project Owner	
▶ 📁 Document Templates		Project Owner	

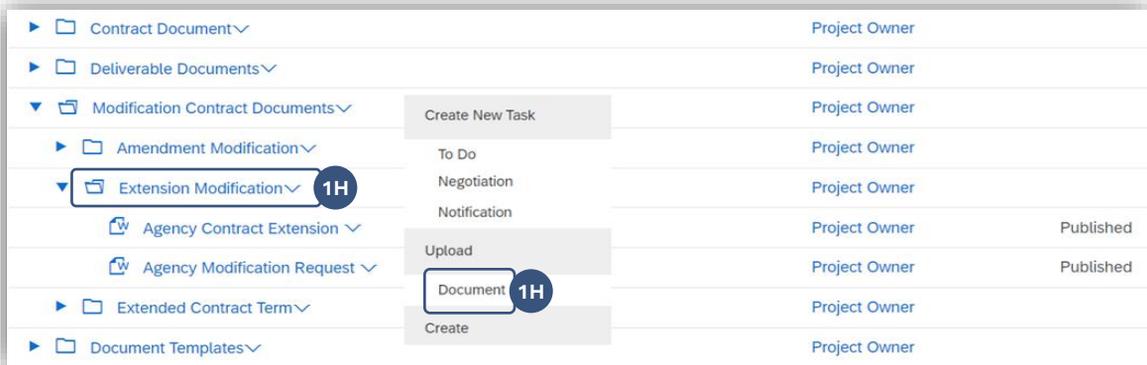
Modifying a Contract Workspace (Non-IT)

G. Click the blue triangle to the left of the **Document Templates** folder, then do the same next to the **Modification Templates** folder. Click on the **Modification Request Template** and the relevant **Contract XXX Template** documents and select **Download** from the popup menus. Update the documents accordingly and save local copies.

 Name the completed documents clearly to indicate that these are newer versions of these documents than the originals.



H. Return to the **XXX Modification** document folder for the modification being requested. DO NOT **Replace** the existing documents. Click on the **XXX Modification** folder and select **Document** beneath **Upload** in the popup menu.

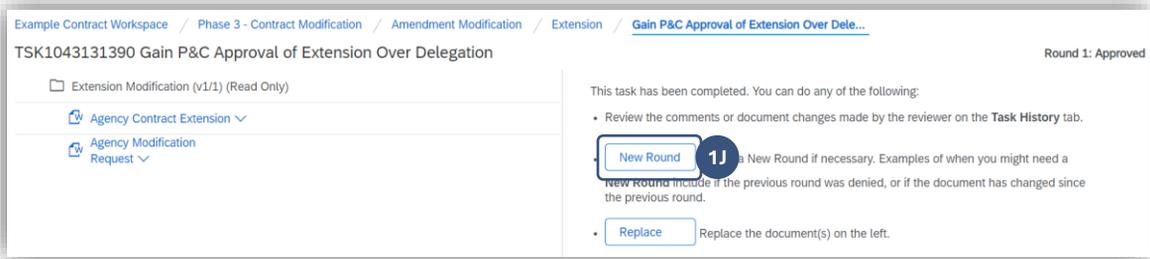


I. Upload all relevant documents for P&C review with names clearly indicating they are newer versions.

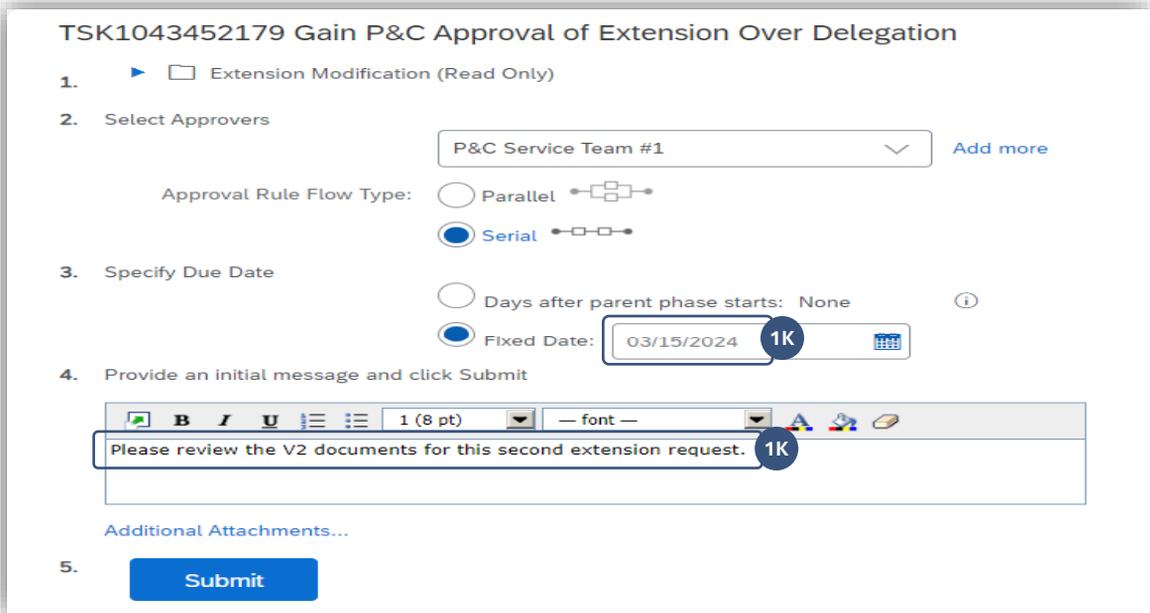


Modifying a Contract Workspace (Non-IT)

J. Navigate back to the **Tasks** tab and click on the **Gain P&C Approval...** task and select **View Task Details** from the drop-down. Click **New Round**.



K. On the subsequent **Approval Task** page, make sure the approver is correct, set a new **Fixed Date** in the **Specify Due Date** field, include a message to P&C highlighting the newer documents for review this round, and click the **Submit** button to send the modification request to P&C for approval.



L. After the task is submitted to P&C, the status will change to **In Approval** and the user will wait for P&C to approve or deny the request just as they would in a normal modification. Details of previous rounds of approvals will remain in the task on the **Task History** tab. Once P&C provides final approval, the task **Status** will automatically update to **Approved**.



M. Once all requisite changes, approvals, and signatures have been completed, and the executed Modification document has been uploaded to the Contract Workspace, return to the **Overview** tab, click **Actions** in the **Contract Attributes** section, and select **Publish** from the drop-down. The CW will revert to **Published** status and cannot be edited until another **Amendment** is initiated.

Modifying a Contract Workspace (Non-IT)

2

Multiple Contract Amendments

Contract Workspaces created AFTER May 2024 – New Tasks will generate; New Documents will NOT:

- A.** If a **Project Owner** selects an **Amendment Type** that was NOT the selection in a previous modification (i.e., the first modification was a **Renewal Amendment** and the current modification is an **Amendment Amendment**), a new set of tasks and document templates will populate in the CW and the **Project Owner** can proceed as instructed above per the **Amendment Type** selected.
- B.** If a **Project Owner** selects an **Amendment Type** that IS the same selection as a previous modification (i.e., the first modification was an **Amendment Amendment** and the current modification is, too), a new set of tasks will populate in the CW, but NOT a new set of document templates.
- C.** After selecting an **Amendment Type** that was previously processed (for this example, we will demonstrate a second **Extension** via an **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].

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**

- D.** Navigate to the **Tasks** tab and note that a new version of the duplicated **Phase 3 – Contract Modification** tasks exist. The existing task list will include **Update Workspace** and **Gain P&C Approval of XXX Over Delegation** tasks in **Not Started**.

Task Name	Task ID	Owner	Status	Due Date
Phase 1 - Contract Creation and Execution		Project Owner	In Progress	
Phase 2 - Contract Management		Project Owner	Not Started	
Phase 3 - Contract Modification		Project Owner	In Progress	05/07/2024
Amendment Modification		Project Owner	In Progress	05/07/2024
Amendment		Project Owner	In Progress	
Extension		Project Owner	In Progress	05/07/2024
Document Factors for Extension		Project Owner	Not Started	
Update Workspace	Example Contract Workspace	Project Owner	Not Started	2E
Prepare Extension Document		Project Owner	Not Started	
Approve Extension Document	Extension Modification	Project Owner	Not Started	
Gain P&C Approval of Contract Extension Greater than 3 Years (if Applicable)	Extended Contract Term	Project Owner	Not Started	
Gain P&C Approval of Extension Over Delegation	Extension Modification	classroomtraining54	Not Started	2D 2024
Obtain Signatures from Relevant Signers	Extension Modification	Project Owner	Not Started	
Publish Contract Workspace	Example Contract Workspace	Project Owner	Not Started	

Modifying a Contract Workspace (Non-IT)

- E. Update the CW by editing any field on the **Overview** tab needs to be changed, i.e., the **Contract Amount** and the **Expiration Date**
- F. The Project Owner must mark the **Update Workspace** task as “Complete” before initiating any other tasks in this phase. Click the **Update Workspace** task name and select **Mark Complete**.
- G. Navigate to the **Documents** tab and note that new versions of the duplicated modification template documents do NOT generate. The previously submitted documents will remain in the folder.

▶	Contract Document	Project Owner	
▶	Deliverable Documents	Project Owner	
▼	Modification Contract Documents	Project Owner	
▶	Amendment Modification	Project Owner	
▼	Extension Modification	Project Owner	
	Agency Contract Extension	Project Owner	Published
	Agency Modification Request	Project Owner	Published
▶	Extended Contract Term	Project Owner	
▶	Document Templates	Project Owner	

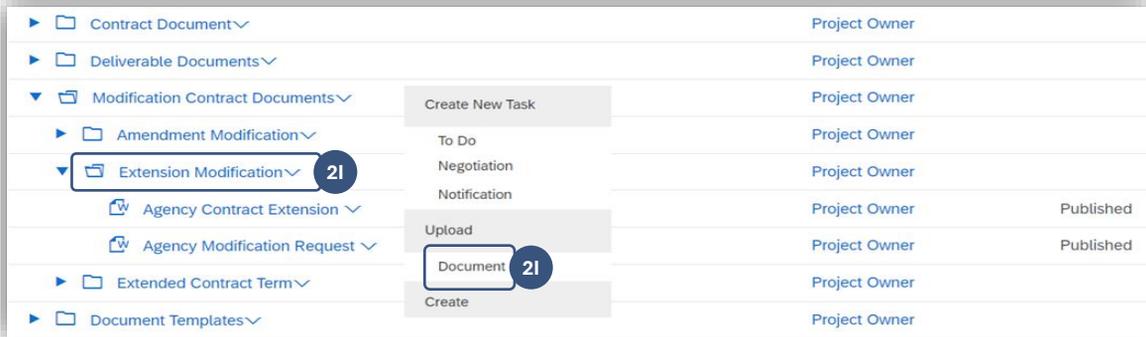
- H. Click the blue triangle to the left of the **Document Templates** folder, then do the same next to the **Modification Templates** folder. Click on the **Modification Request Template** and the relevant **Contract XXX Template** documents and select **Download** from the popup menus. Update the documents accordingly and save local copies.

 Name the completed documents clearly to indicate that these are newer versions of these documents than the originals.

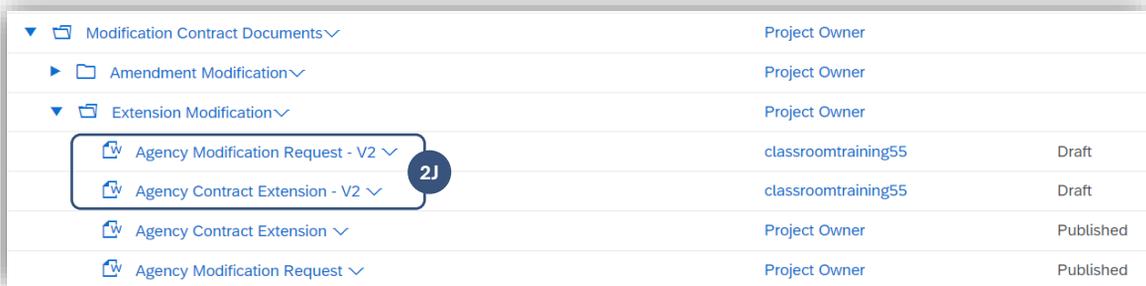
▶	Modification Contract Documents	Project Owner	
▼	Document Templates	Project Owner	
▼	Modification Templates	Project Owner	
	Contract Amendment Template	Project Owner	Not Edited
	Contract Extension Template	Project Owner	Not Edited
	Contract Renewal Template	Project Owner	Not Edited
	Contract Termination Request Template	Project Owner	Not Edited
	Extended Contract Term Template	Project Owner	Not Edited
	Modification Request Template	Project Owner	Not Edited
	Request to Cure Notice Template	Project Owner	Not Edited

Modifying a Contract Workspace (Non-IT)

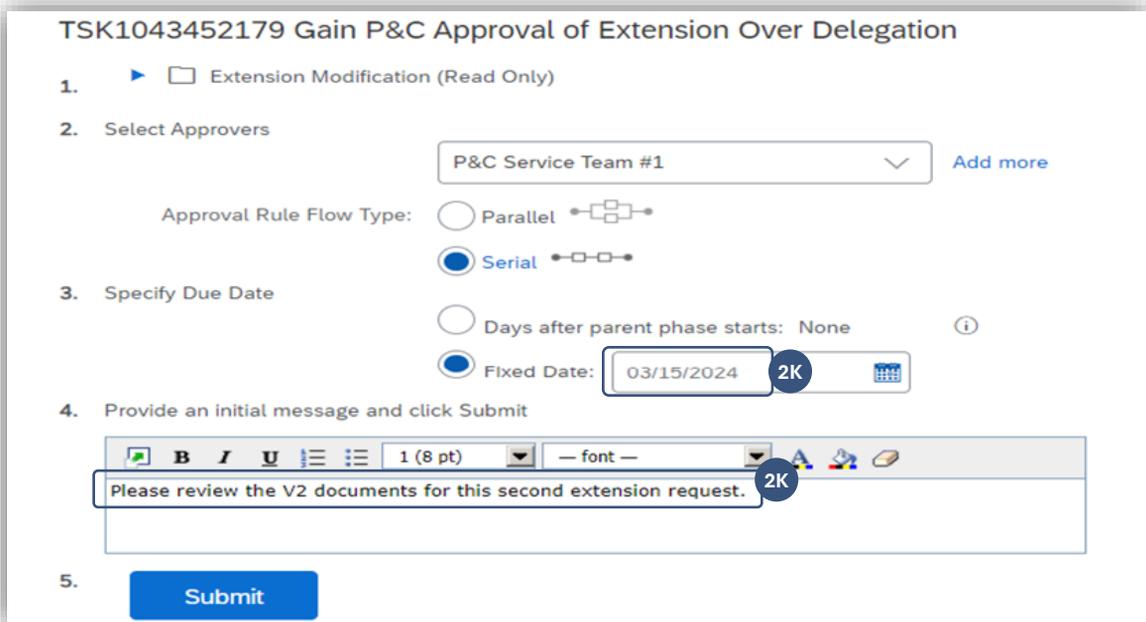
I. Return to the **XXX Modification** document folder for the modification being requested. DO NOT **Replace** the existing documents. Click on the **XXX Modification** folder and select **Document** beneath **Upload** in the popup menu.



J. Upload all relevant documents for P&C review with names clearly indicating they are newer versions.



K. Navigate back to the **Tasks** tab and click on the **Gain P&C Approval...** task and select **View Task Details** from the drop-down. On the subsequent **Approval Task** page, make sure the approver is correct, set a new **Fixed Date** in the **Specify Due Date** field, include a message to P&C highlighting the newer documents for review this round, and click the **Submit** button to send the modification request to P&C for approval.



Modifying a Contract Workspace (Non-IT)

- L. After the task is submitted to P&C, the status will change to **In Approval** and the user will wait for P&C to approve or deny the request just as they would in a first modification. Details of previous rounds of approvals will remain in the task on the **Task History** tab. Once P&C provides final approval, the task **Status** will automatically update to **Approved**.



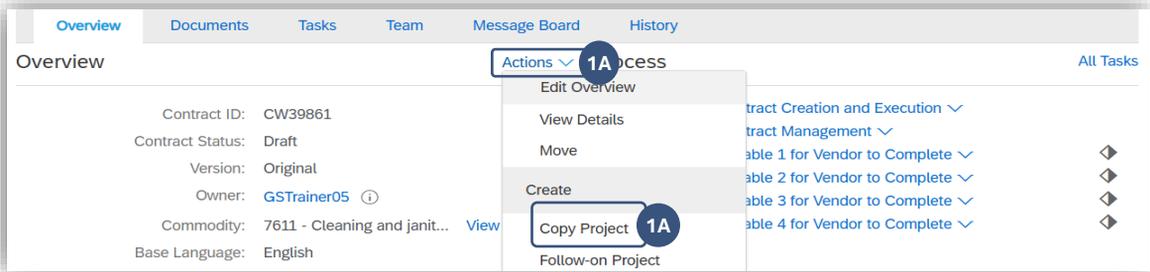
- M. Once all requisite changes, approvals, and signatures have been completed, and the executed Modification document has been uploaded to the Contract Workspace, return to the **Overview** tab, click **Actions** in the **Contract Attributes** section, and select **Publish** from the drop-down. The CW will revert to **Published** status and cannot be edited until another **Amendment** is initiated.

Copying a Contract Workspace

1

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.

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



- B. 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**.

- C. 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 and changes made to the project groups that were in the template?** Both questions can be answered with either **Yes** or **No** from the drop-down menus, although it is advised to select **No** if clean documents are needed. When all Contract Attribute fields are filled in and all questions are answered, click **Create**.



- D. 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.

Modifying a Contract Workspace (Non-IT)

Managing Multi-Vendor Contract Workspaces

1

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.

- A. Click **Create Contract Workspace (Procurement)** to create the initial CW.
- B. Fill in all the contract attribute fields including the **Statewide Contract ID** field or **Agency Contract ID** field depending on the **Contract Type**. Select the **Template** type, answer the template questions, then click **Create**.
- C. At this point the CW is ready to be copied. Initiate the copy through one of the two options outlined above.
- D. On the **Create Contract Workspace (Procurement)** page of the newly copied CW, populate all fields for which information did not auto-populate.
- E. In the **Supplier** field, search for a different **Supplier** on this contract and replace the copied **Supplier** with that value. Answer the template questions and click **Create**.
- F. 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 such as uploading the unique executed contract document for each CW and publishing the Workspace.