NC eProcurement
Modifying a Contract Workspace (Non-IT)

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 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. 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.

3. **'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.

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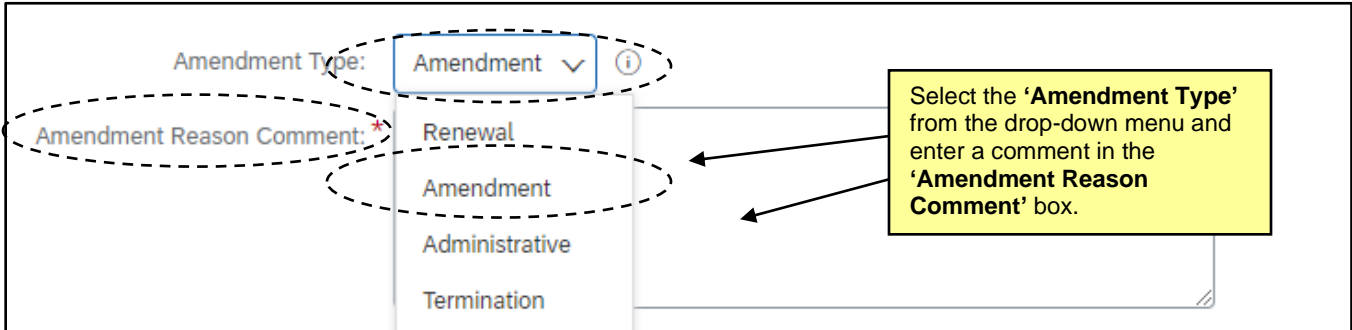
II.   Initiating an 'Amendment'

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

From the **'Contract Attributes'** section of the **'Overview'** tab, click **'Actions'** and select **'Amend'** from the drop-down menu.
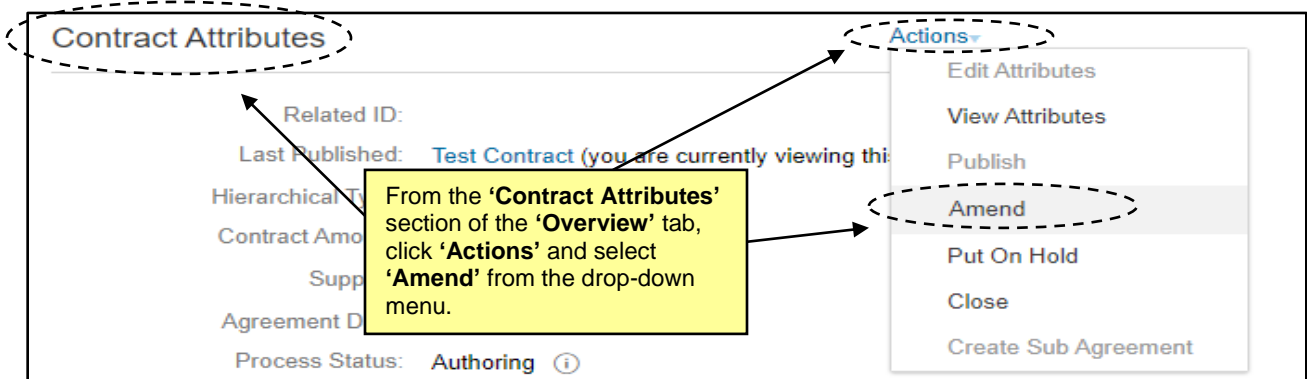
2. On the next page, select the **'Amendment Type'** from the drop-down menu and add a comment regarding the reason for the **'Amendment.'** Click **'OK'** and the **'Overview'** tab will display.

III. 'Administrative Amendment'

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.'**

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 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.
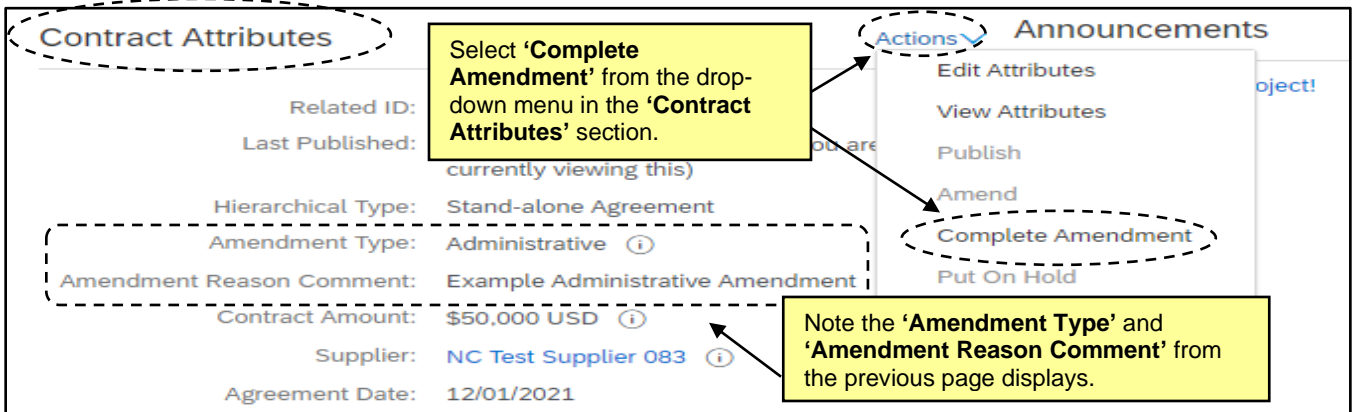
IV. 'Amendment Amendment'

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.

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

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 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.

3. 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 9**.

4. 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'**.

5. 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.
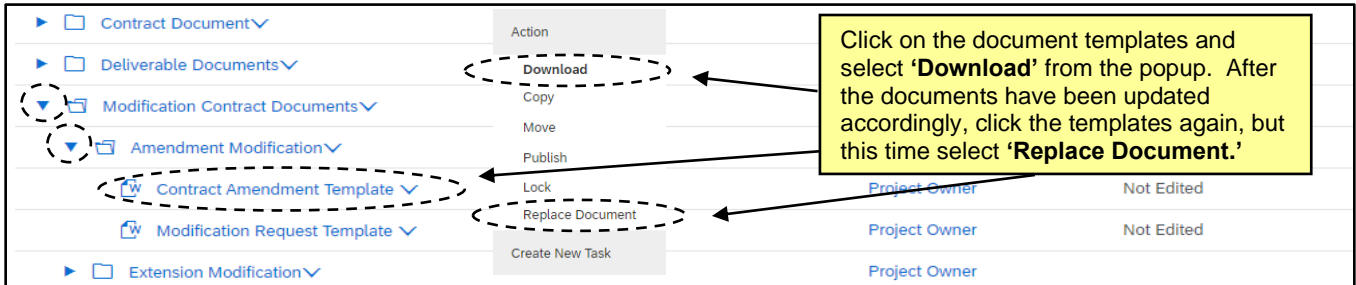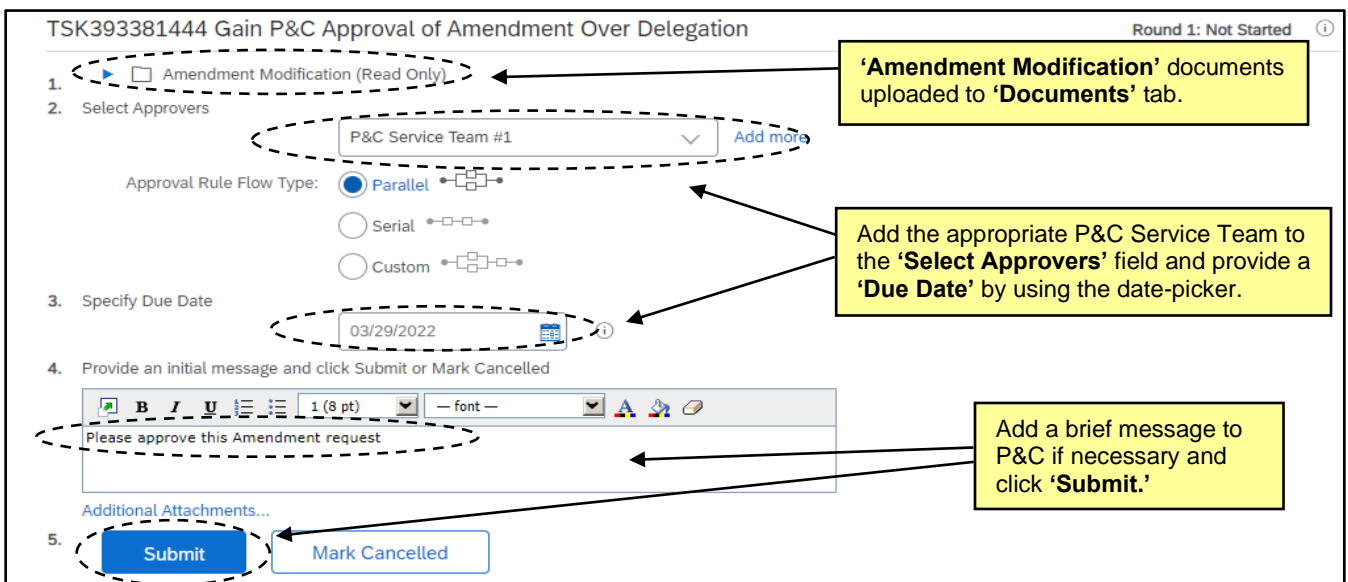
6. Click on each of the document templates and select **'Download'** from the popup menu. Update the documents accordingly and save a local copy. Click back on the templates, and this time select **'Replace Document.'** Add and save the updated versions of the **'Contract Amendment Template'** and the **'Modification Request Template.'**

Click on the document templates and select **'Download'** from the popup. After the documents have been updated accordingly, click the templates again, but this time select **'Replace Document.'**

7. 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.

Select **'View Task Details'** on the drop-down from the **'Gain P&C Approval of Amendment Over Delegation'** task.

8. 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.

'Amendment Modification' documents uploaded to **'Documents'** tab.

Add the appropriate P&C Service Team to the **'Select Approvers'** field and provide a **'Due Date'** by using the date-picker.

Add a brief message to P&C if necessary and click **'Submit.'**

9. 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 ∨		Project Owner	In Progress	03/29/2022
🕐 Update Workspace ∨	Example Contract Workspace ∨	Project Owner	Not Started	
🕐 Prepare Amendment Document ∨		Project Owner	Not Started	
🕐 Approve Amendment Document ∨	...ation ∨	Project Owner	Not Started	
📋 Gain P&C Approval of Amendment Over Delegation ∨	Amendment Modification ∨	classroomtraining35(	In Approval	03/29/2022
🕐 Obtain Signatures from Relevant Signers ∨	Amendment Modification ∨	Project Owner	Not Started	
🕐 Publish Contract Workspace ∨	Example Contract Workspace ∨	Project Owner	Not Started	

*After being submitted to P&C for approval, the task **'Status'** will update to **'In Approval.'***

10. 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.

Contract Attributes　　　　　　　　　　　　　　**Actions ∨**

Related ID: PR1234567
Last ... (v2/2) ⓘ
Hierarc...
Amend...
Amendment Reason ...ment
Contract Amount: $50,000 USD ⓘ
Supplier: NC Test Supplier 083 ⓘ

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

*Select **'Actions'** from the drop-down menu in the **'Contract Attributes'** section then click **'Publish'** to finalize the Amendment.*

V.　'Extension Amendment'

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

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

   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.'**

Overview	Actions ∨	Process	All Tasks
Contract ID: CW21496		➠ Phase 1 - Contract Creation and Execution ∨	
Contract Status: Draft Amendment		⇨ Phase 2 - Contract Management ∨	
Last Published Date: 02/09/2022 ⓘ		🕐 Deliverable 1 for Vendor to Complete ∨	◆
Version: v2 (editing)		...o Complete ∨	◆
Owner: classroomtraining32 ⓘ		...o Complete ∨	◆
Test Project: No ⓘ		...o Complete ∨	◆
Commodity: 761115 - General building... View more			
Base Language: English			

*Updates to the **'Contract Status'** and **'Version'** fields.*

2. Navigate to the **'Tasks'** tab to view the newly-added phase (3) and tasks to help guide the user through the extension 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 **'Extension'** subsection. Click the blue arrow to the left of that option to reveal the tasks associated with an **'Extension'** modification.

3. 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 Extension Over Delegation'** will appear on the **'Tasks'** tab. If this is not the case, users can skip to **Step 9**.

4. 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'**.

5. 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.

6. 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.'**

Click on the document templates and select **'Download'** from the popup. After the documents have been updated accordingly, click the templates again, but this time select **'Replace Document.'**

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

Select **'View Task Details'** on the drop-down from the **'Gain P&C Approval Extension Over Delegation'** task.

8. 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.

Extension Modification documents uploaded to **'Documents'** tab.

Add the appropriate P&C Service Team to the **'Select Approvers'** field and provide a **'Due Date'** by using the date-picker.

Add a brief message to P&C if necessary and click **'Submit.'**

Note: 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.

9. 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 ∨	…sion Modification ∨	Project Owner	Not Started
🕐 Gain P&C Approval of Contract Extens…	…ended Contract Term ∨	Project Owner	Not Started
🗹 Gain P&C Approval of Extension Over Delegation ∨	Extension Modification ∨	classroomtraining53	In Approval	12/22/2023
🕐 Obtain Signatures from Relevant Signers ∨	Extension Modification ∨	Project Owner	Not Started
🕐 Publish Contract Workspace ∨	Extension Test Workspace ∨	Project Owner	Not Started

*After being submitted to P&C for approval, the task **'Status'** will update to **'In Approval.'***

10. 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.

Note: 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.

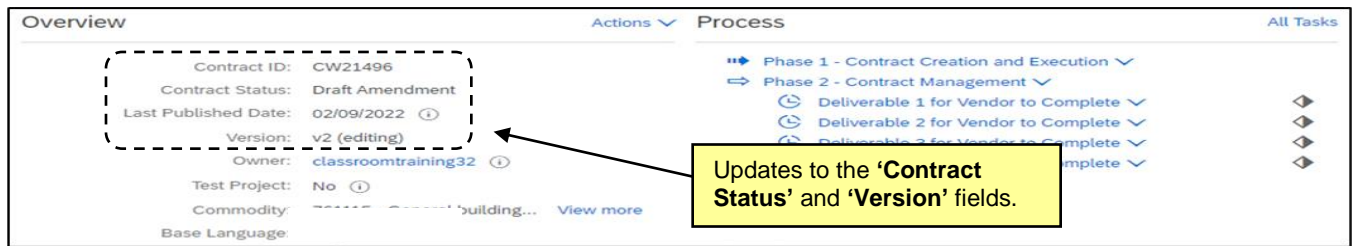| Contract Attributes		Actions ∨	s
		Edit Attributes	
Related ID: PR1234567		View Attributes	oject!
Last	(v2/2) ⓘ	Publish	
Hierarc		Amend	
Amend		Put On Hold	
Amendment Reason	ment	Close	
Contract Amount: $50,000 USD ⓘ		Create Sub Agreement	
Supplier: NC Test Supplier 083 ⓘ			

*Select **'Actions'** from the drop-down menu in the **'Contract Attributes'** section then click **'Publish'** to finalize the Amendment.*

VI.   'Renewal Amendment'

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.

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 **'v1 (editing)'** [or v2/3/4, etc., depending on what number the previous **'Version'** was].
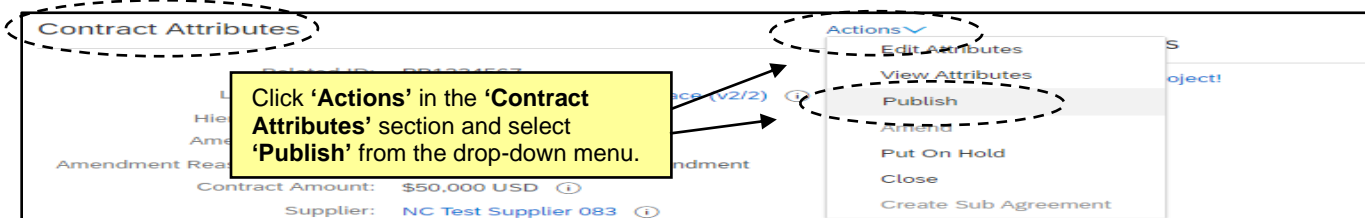
    Note: While a CW is in a **'Status'** of **'Draft Amendment,'** all scheduled **'Expiration Notification'** emails will be suspended until the modification is complete and the **'Status'** goes back to **'Published.'**

2. Navigate to the **'Tasks'** tab 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.
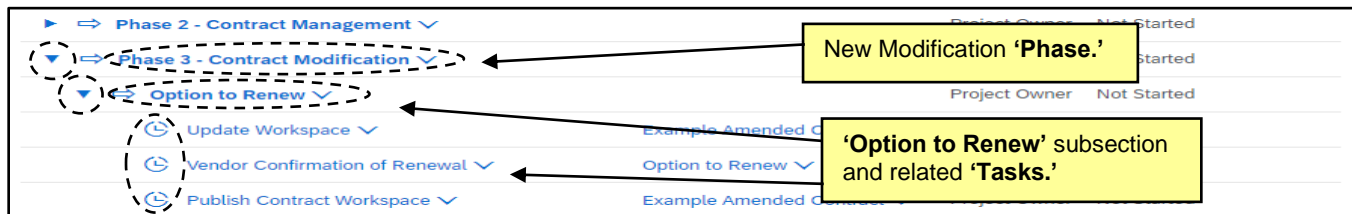
3. As with the **'Tasks'** in the first two phases associated with the initial creation of the Contract Workspace, the tasks themselves are not required to be completed to finalize a modification, but rather are intended to serve as a road map for best practices. Additionally, an **'Option to Renew'** 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.

4. 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.

VII. 'Termination Amendment'

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.

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

   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 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.

3. 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 9**.

4. 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'**.

5. 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.

6. 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.

Click on the document templates and select **'Download'** from the popup. After the documents have been updated accordingly, click the templates again, but this time select **'Replace Document.'**

7. 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.

Select **'View Task Details'** on the drop-down from the **'Gain P&C Approval of Termination Over Delegation'** task.

8. 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.

Termination documents uploaded to **'Documents'** tab.

Add the appropriate P&C Service Team to the **'Select Approvers'** field and provide a **'Due Date'** by using the date-picker.

Add a brief message if necessary and click **'Submit.'**

9. 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.'**

▼ ➡ Termination Modification ∨			Project Owner	In Progress	02/21/2022
🕐 Update Workspace ∨	Example Terminated Contract ∨		Project Owner	Not Started	
🕐 Prepare Termination Letter ∨	...er Draft ∨		Project Owner	Not Started	
🕐 Approve Termination Letter ∨	...dification ∨		Project Owner	Not Started	
📄 Gain P&C Approval of Terminatio...	...dification ∨		classroomtraining32	In Approval	02/21/2022
🕐 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	

> After being submitted to P&C for approval, the task **'Status'** will update to **'In Approval.'**

10. 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.

    Note: 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

		Actions ∨
Related ID:	PR1234567	Edit Attributes
Last Published:	Example Contract Workspace (V2/2) ⓘ	View Attributes
Hierarchica...		Publish
Amendmen...		Amend
Amendment Reason Co...	...ndment	Put On Hold
Contract A...		Close
Supplier:	NC Test Supplier 083 ⓘ	Create Sub Agreement

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

VIII. Multiple Contract Modifications

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:

1. 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.

2. 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.

Note: 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.

3. 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].

   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.'**

4. 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.

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

6. 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.

7. 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.

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

8. 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.

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

10. 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'**.

11. 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.

12. 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'.**

13. 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.

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

1. 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.

2. 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.

3. 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].

   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.'**

4. 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'** status.

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

6. 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'.**

7. 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.

8. 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.
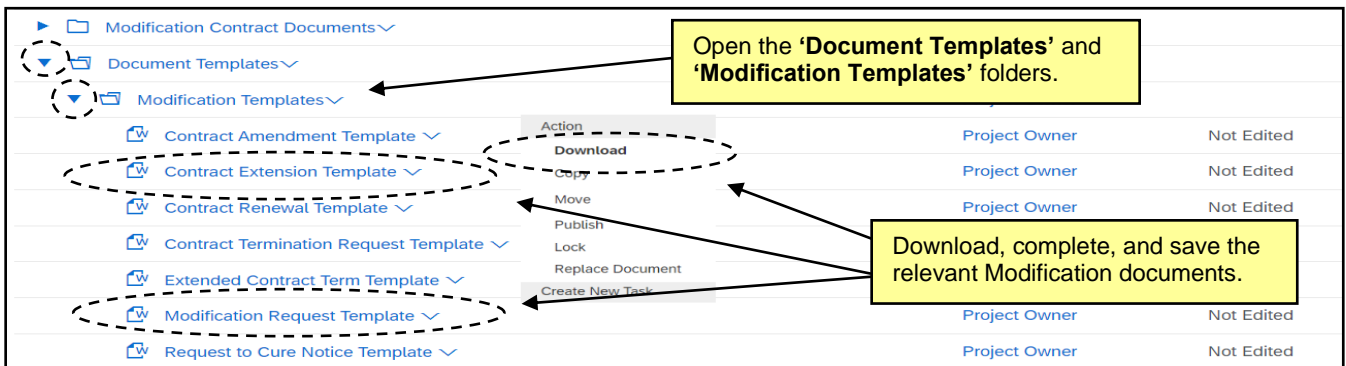
   Note: Name the completed documents clearly to indicate that these are newer versions of these documents than the originals.

9. 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.

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

▼ 🗔 Modification Contract Documents ⌄		Project Owner	
▶ 🗀 Amendment Modification ⌄		Project Owner	
▼ 🗔 Extension Modification ⌄			
🗎ᵂ Agency Modification Request - V2 ⌄			Draft
🗎ᵂ Agency Contract Extension - V2 ⌄			Draft
🗎ᵂ Agency Contract Extension ⌄		Project Owner	Published
🗎ᵂ Agency Modification Request ⌄		Project Owner	Published

> **Clearly name new documents to differentiate from original versions.**

11. 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.

TSK1043452179 Gain P&C Approval of Extension Over Delegation

1.   ▶ 🗀 Extension Modification (Read Only)

2.   Select Approvers

    P&C Service Team #1   ⌄   Add more

    Type: ◯ Parallel
            ● Serial

3.   Specify Due Date

    ◯ Days after parent phase starts: None ⓘ
    ● Fixed Date: 03/15/2024 📅

> **Set a new 'Due Date,'** add a note to P&C to alert them to the newer documents for review, and click the **'Submit'** button.

4.   Provide an initial message and click Submit

    [🖼 **B** *I* U ≔ ≔ 1 (8-pt) ⌄ font ⌄ **A** 🎨 🧽]

    Please review the V2 documents for this second extension request.

    Additional Attachments…

5.   **Submit**

12. 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'.**

The **'Task History'** tab will show the new request to P&C as well as maintain record of previous rounds of approval requests.
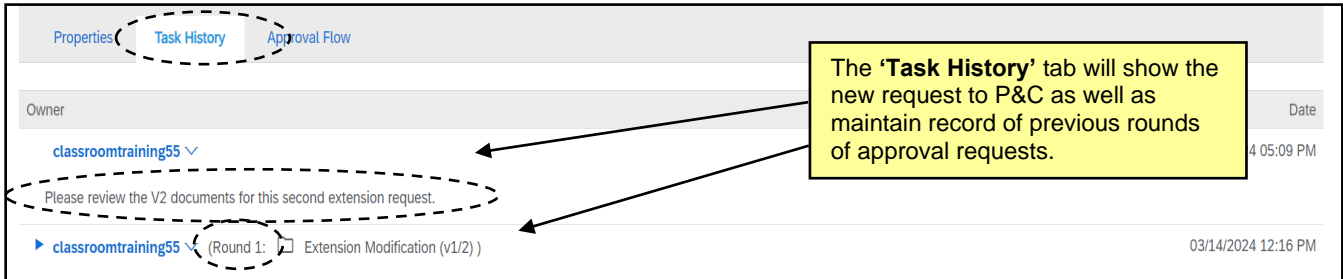
13. Once all requisite changes, approvals, and signatures have been completed, and the executed Modification document has been uploaded to the Contract Workspace, return to the **'Overview'** tab, click **'Actions'** in the **'Contract Attributes'** section, and select **'Publish'** from the drop-down. The CW will revert to **'Published'** status and cannot be edited until another **'Amendment'** is initiated.
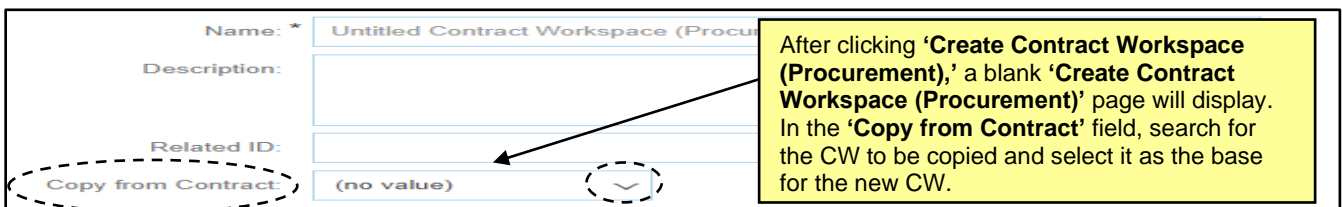
IX. Copying a Contract Workspace

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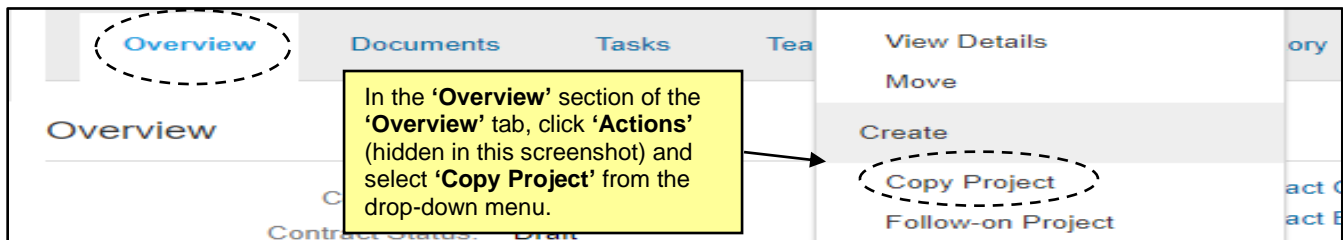
   b. Click **'Create Contract Workspace (Procurement)'** and a blank **'Create Contract Workspace (Procurement)'** page will display. In the **'Copy from Contract'** field, click the down-arrow to search for the previous CW to copy and click **'Select'** to use it as basis for the new CW.

After clicking **'Create Contract Workspace (Procurement),'** a blank **'Create Contract Workspace (Procurement)'** 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 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. When all Contract Attribute fields are filled in and all questions are answered, click **'Create.'**

Do you want to copy documents that were modified in the project being copied?	Yes ∨
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?	Yes ∨

Answer the two additional questions after the traditional template questions and click **'Create.'** → Create

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.

X.   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.

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

2. 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.'**

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

4. On the **'Create Contract Workspace (Procurement)'** page of the newly copied CW, populate all fields for which information did not auto-populate.

5. 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.'**

6. 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.