ePM contracts are created to record the terms and amounts in preparation for Earned Value. Use contracts to track planned and actual obligations as well as manage the execution of work under those obligations. Actual contracts are assembled, negotiated, and issued using other GSA tools and applications. Before approving a contract in ePM, enter the schedule of values (SOV) and attach a scanned copy of the executed contract and cost loaded schedule to the ePM record. Each line on the SOV values must be assigned to a cost account. In addition, the line can be coded to a Building ID, CSI Code, and Shell/TI space.

**WHO USES...**

- Construction Manager
- Project Manager
- Contracting Officer
- Contract Specialist

**NEEDED DOCUMENTS...**

- Contract Award and CLINs
- NTP Letter
- Cost Loaded Schedule (in native format)

**HOW TO...**

See screenshots within this document for additional information.

**CREATE A CONTRACT**

1. Log into ePM as a user with the contract creator security role. Navigate to the appropriate project.
2. Navigate to ‘PM Tools’ in the left-hand menu, expand the ‘Contract Management’ menu, and choose ‘Contracts.’
3. Click the blue arrow next to the ‘New’ button, and select ‘Contract’. A blank contract is displayed.

4. On the Main page, fill in the following fields in the Details section:
   - Title: The naming convention is "Contractor Type-Primary-Type of Services-Phase" (e.g. GC-Primary-Construction-Award).
   - Contract Number: GSA contract number from EASi
   - Contract Classification: Use the blue lookup list to select the appropriate option i.e. contract, IDIQ, Delivery/Task Order
   - Cost Period: Cost Period should match the month and year of the NTP date
   - Contractor Type: Use the blue lookup list to select A/E, Construction, D/B, etc.
   - Included in EV Measure: This box is for Capital project contracts (Construction, CMc, D/B, etc.) that are deemed to be measured by the GSA Central Office. Select this checkbox if this contract should be included in Earned Value measure reporting. For more information on earned value, reference QRG 105: Earned Value.
Additional Information Section

- Contract Duration (Calendar Days): Enter the amount of construction days listed on the Award or NTP
- Pegasys Document Number (PDN)

Contract Dates Section

- Award Date
- Notice to Proceed (NTP/Start Date)
- Finish Date: Enter an estimated date for when the contract will be substantially complete (Estimated Substantial Completion Date)

Other Dates Section

- Estimated Substantial Completion Date: This is the same as the Finish Date field from above
Contract Parties Section

- In the Contract Parties section, although not shown with an asterisk, the Contact in the Procuring Office and Vendor fields are required.

EV Mode Section

- EV Mode is a 3 level hierarchical lookup that shows the contract type: New Construction or Repair & Alteration (R&A). The selection of the lower level Courthouse, Other, and Office determines how the EV Utility will calculate and spread the Spend Plan. For more fields pertaining to Earned Value requirements and how to use the EV Utility, reference QRG 105: Earned Value.

5. Click on the Schedule of Values (SOV) page. Click Add for each CLIN that has been awarded.
On the SOV line, enter the:
- Description
- Scheduled Amount

On the Cost Account Allocation line, enter the following info:
- Item Description
- Cost Account
- Building ID
- CSI Code
- Shell/TI
- Linked Funding Line

6. Click the yellow workflow button labeled ‘Set to Pending’, found at the top of the screen. An
‘Execute Workflow’ dialog box displays, showing who will receive a notice to approve the
document (the ‘To’ box), who will be copied (the ‘Cc’ box), what action the recipient should take,
the message the recipient will see when notified, the priority of this process, and the date the
subsequent action is due. These fields are editable- additional users can be notified or copied,
the custom message, priority and due date can be changed.

7. Click ‘Execute’. If successful, ePM displays an ‘Action Complete’ message showing to whom
notification has been sent. User has the choice of returning to the Contract Document itself or to
the Register which shows all Contract documents on this project.

REFERENCES

Reference the following ePM Quick Reference Guides (QRGs) for additional information. QRGs can be
accessed through the ePM Portal.

- QRG 01 - Navigating ePM
- QRG 21 - Contract Approval
- QRG 22 - Contract Modification Creation
- QRG 23 - Contract Modification Approval
- QRG 24 - Invoice Document Creation
- QRG 25 - Invoice Approval
- QRG 26 - Potential Change Order (PCO) Creation
- QRG 31 - Funding Document Creation
- QRG 32 - Funding Document Approval
- QRG 105 - Earned Value
- QRG 137 - Cost Accounts