

ePM Quick Reference Guide #020

Contract Creation



WHAT IS . . .

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 will be assembled, negotiated and issued using other GSA tools and applications. Before approving a contract in ePM, enter the schedule of values and attach a scanned copy of the executed contract and cost loaded schedule to the ePM record. Each line on the schedule of 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

NEEDED DOCUMENTS . . .

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

HOW TO . . .

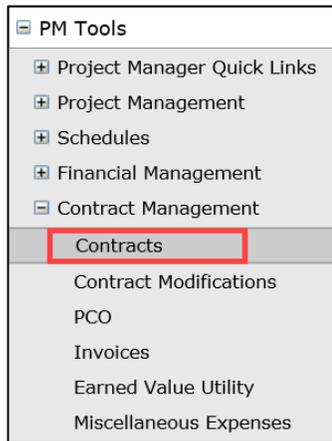
See screenshots within this document for additional information.

A. CREATE A CONTRACT

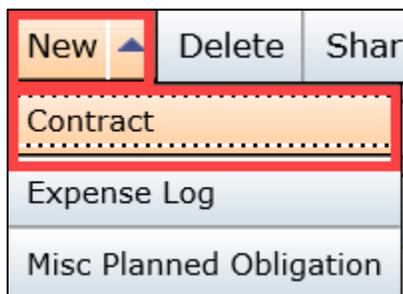
1. Log into ePM as a user with the contract creator security role. Navigate to the appropriate project.
2. Navigate to the Contracts register by clicking on PM Tools > Contract Management > Contracts. The Contracts register displays.

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3. Click the arrow next to the 'New' button, and select 'Contract'. A blank Contract displays.



4. On the Main page, fill in the following fields in the Details section:

- Title: naming convention is "Contractor Type-Primary-Type of Services-Phase" (e.g. GC-Primary-Construction-Award).
- Contract Number: is the GSA contract number from EASi.
- Contract Classification: Use the blue lookup list to select the appropriate option i.e. Contract, IDIQ, Delivery/Task Order.
- Select the 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 checkbox involve Capital project Contracts (Construction, CMc, D/B, etc.) that are deemed to be measured by the GSA Central Office with BI Reporting (Analytics). Select this checkbox if this type of Contract should be included in EV Measure reporting.

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DETAILS *	
Current State	Draft
Title *	<input type="text"/>
Contract Number	<input type="text"/> -
Contract Classification	<input type="text"/>
Description	<input type="text"/>
Cost Period	<input type="text"/>
Planned Obligation Period	<input type="text"/>
Included in EV Measure	<input type="checkbox"/>
Contractor Type	<input type="text"/>

Additional Information Section:

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

ADDITIONAL INFORMATION	
Notes	<input type="text"/>
Contract Duration (Calendar Days)	<input type="text"/>
Pegasys Document Number	<input type="text"/>

Contract Dates Section:

- Enter the Notice To Proceed (NTP/Start Date).
- Enter the Finish Date as the Substantial Completion Date.
- Enter an estimated date for when the Contract will be substantially complete (Estimated Substantial Completion Date).

CONTRACT DATES	
Date Entered	Tuesday, April 16, 2019
Award Date	<input type="text"/>
NTP/Start Date	<input type="text"/>
Finish Date	<input type="text"/>

Other Dates Section:

- Enter the Estimated Substantial Completion Date (same as the Finish Date cell from above)

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OTHER DATES	
Planned Substantial Completion Date	<input type="text"/>
Estimated Substantial Completion Date	<input type="text"/>
Actual Substantial Completion Date	<input type="text"/>

Contract Parties Section:

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

CONTRACT PARTIES		
Procuring Office	Company	Contact
	<input type="text"/>	<input type="text"/>
Vendor	Company	Contact
	<input type="text"/>	<input type="text"/>
Manager	Company	Contact
	<input type="text"/>	<input type="text"/>

EV Mode Section:

- EV Mode is a 3 level hierarchical Lookup depicting either New Construction or Repair & Alteration (R&A) type of Contract. 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**.

EV Mode	
EV Mode	<input type="text"/>

- Click on the Schedule of Values (SOV) page. Click Add for each CLIN that has been awarded.

CONTRACT: New Document					
Main		Financial Summary	Schedule Of Values	Funding	Settings Drawings Properties
Display Columns: All		Page 1 of 1		Find	Reset
Add	Add CA Allocation	Add Multiple CA Allocations	Remove	Verify Allocation Amounts	Tools Update Totals
CLIN #	Description	Pegasys Line Number	*Scheduled Amount	ACR in App State	
<input type="checkbox"/>					

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On the SOV Line

- Enter a Description
- Scheduled Amount.

On the Cost Account Allocation line

- Enter an Item Description
- Select a Cost Account.
- Select a value for the Building ID
- Select a value for the CSI Code
- Select a value for the Shell/TI
- Select the Linked Funding Line

Execute Workflow to set the Contract to Pending:

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.

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REFERENCE

Reference the following ePM Quick Reference Guides (QRGs) for additional information. QRGs can be accessed through the ePM Portal – [GSA](#)

- QRG 01 - Navigating ePM
- QRG 02 - Using the ePM Address Book
- QRG 31 - Funding Document Creation
- QRG 32 - Funding Document Approval