

ePM Quick Reference Guide #022

Contract Modification Creation

WHAT IS . . .

ePM records contract modifications are issued against contracts whenever necessary due to a change in the contracts requirements, a scheduling conflict, a problem of materials availability, or some other factor. An ePM modification contains several date and currency information boxes that enable you to specify and gauge the impact of the modification on the contract in time and monetary terms. These information boxes are 'smart' in that they always reflect the impact of other modifications against the contract. The recording of a modification in ePM is the final step of an overall change management process that may involve other documents in ePM such as a Potential Change Order. Use contract modifications for logging in-progress and actual modifications. Prior to approving a modification in ePM the detailed schedule of values must be included. Attach a scanned copy of the executed contract modification to the ePM contract modification document.

WHO USES . . .

- GSA Project Manager
- Construction Manager

NEEDED DOCUMENTS . . .

- Modifications and CLINS

HOW TO . . .

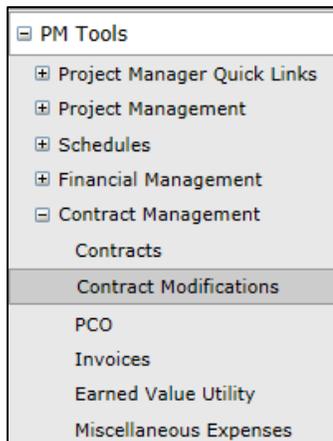
See screenshots within this document for additional information.

A. STEPS TO CREATE A CONTRACT MODIFICATION

1. Log into ePM as a user with the Modification Creator security role, and then navigate to the appropriate project.
2. Navigate to PM Tools > Contract Management > Contract Modifications.

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3. Click the **'New'** button. A two-step wizard launches. First, select the Contract to which this modification will relate. Then click **'Next'**.
4. Once you **Add** the correct contract, click **OK**, and then **Finish**. A blank Modification document appears.
5. On the **Main** page, fill in the fields in the **Details** and **Dates** sections. Other sections can record various details of the modification.

Notes:

- Enter the Title as a required field: Vendor-Contractor Type-Type of Services-Phase (James G Davis-GC-Increase Project Scope-Phase 1).
- The parent Originating Contract is auto populated with a hyphen. Enter a Modification Number "PS01".
- Enter the Cost Period. This should be the month and year as the NTP of the mod.
- Enter the required Notice To Proceed (NTP/Start Date) and Finish Date (Finish Date is the project's substantial completion date unless otherwise noted in the mod).
- Enter the "This Change Days" if foreseen the Modification will extend the Contract Finish Date.
- The Modification has inherited the Contract Parties data from the parent Originating Contract.

6. Each SOV line item must have a corresponding **Cost Account Allocation**

On the SOV Line, enter just a **Description** and **Scheduled Amount**. On the **Cost Account Allocation** line, enter an **Item Description**, then using the drop down icon, select a Cost Account. Use similar lookups to select values in the **Building ID**, **CSI Code**, and **Shell/TI** fields.

Notes:

- The **Schedule of Values** on the Modification is inherited by the invoice. Therefore, the level of detail needed for invoicing must be known prior to approval of the Modification. Recommended to match the issued CLINS from EASi.



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- The **Schedule of Values Line Number** can be 1, 2, 3, etc. - or it can correspond to the CLIN number 0002, 0003, etc..

B. EXECUTE WORKFLOW TO SET TO PENDING

1. Click the yellow workflow button labeled '**Set to Pending**', found at the top of the screen. An 'Execute Workflow' dialog box appears, showing who will receive a notice to approve (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.
2. Click '**Execute**'. If successful, ePM displays a confirmation message showing who has received a notification. You now have the choice of returning to the Modification Document or to the Register.



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REFERENCE

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

- QRG 01 - Navigating ePM
- QRG 02 - Using the ePM Address Book
- QRG 31 - Funding Document Creation
- QRG 32 - Funding Document Approval
- QRG 20 - Contract Creation
- QRG 21 –Contract Approval
- QRG 22 – Contract Modification Creation