UNIVERSITY OF SOUTH FLORIDA Bull Marketplace – Contracts+ Job Aid Tutorial: Amendment Request

Purpose:	This section outlines the steps necessary to create a Request to Amend a					
	existing contract that is in effect for review and approval.					
Navigation:	Navigate in Bull Marketplace > Contracts >Requests > Request Contract					
Notes:	Only Requestors and Approvers can submit a Contract Request. If an					
	Approver submits, another Accountable Officer needs to be identified as the					
	Contract Approver.					
When to	To use this form for a Contract AMENDMENT the following must be true:					
Use this						
Form	1. Contract you are amending must have a status of either					
	Executed:Future or Executed:In Effect					
	Amendment document references the original Contract and indicates a change.					
	3. Expired contracts may ONLY be amended if:					
	 Contract's end date was dependent on project completion or 					
	production of deliverables and actual calendar end date was					
	unclear or undefined.					
	 Contract expired less than 30 days ago. 					
	$_{\circ}$ The decision on if an Expired contract will be allowed to be					
	amended will be made by PPS.					
	Amendments may be processed for changes to scope, terms, price, length					
	and may be used to introduce renewal terms.					
	This form should NOT be used for:					
	1. Renewing Contracts that already have renewal terms. A renewal					
	defined in the original Contract should be requested with a Contract					
	Renewal Form.					
	2. Processing an extension of a service where the quote does not					
	reference the original Contract. These situations are processed					
	through a new contract request.					

Steps	ps Instructions					
1	In the flyout menu > Go to	Contracts > Requests > Request	Contract			
	👷 Contracts	Contracts	Type to Search C	ontracts Q		
	Accounts Payable Suppliers Sourcing	Contracts Approvals Reports Requests	Request Contra Search Contrac My Contract Re	ct t Requests quests		
2	Create Contrac	ct Request	×	Select Amend Contract		
	Contract Request Type * Contract Request Name * Select a Contract Request Template * Select Contract *	 Create Contract Amend Contract Renew Contract Amendment 1 Amendment Request Form × Type to filter 	Q	Give the request a name The template will default as there is only a single template. Search for the contract you want to amend by using the unique 6 digits after the contract year YYYY- <u>000000</u>		
	 ★ Required NOTE: DOUBLE CHECK THE SELECTING. INCORRECT F REQUEST. NOTE: IN MOST CASES E RESPONSIBILITY OF THE D TIMELY MANNOR. HOWI PROCUREMENT. 	Submit CONTRACT NUMBER THAT YOU REFERENCES WILL BE REJECTED XPIRED CONTRACTS WILL NOT EPARTMENT TO MANAGE CONT EVER, THESE SITUATIONS WILL	Close J WISH TO A AND YOU W BE ALLOW RACTS AND BE REVIEW	MEND IS CORRECT PRIOR TO WILL NEED TO RESTART THE YED TO AMEND. IT IS THE SUBMIT AMENDMENTS IN A ED ON A CASE BY CASE BY		

	Back to My Contract	t Requests			
	Amendment 1	Ir	nstructions	Print Request History ?	
	Form Number: 92 Request Status: Inc	0695 complete To	o use this form for a Contract AMENI	DMENT the following must be true:	
	Instructions		 Contract you are amending must Executed:In Effect 	have a status of either Executed:Future or	
	Details Attachments	0	 Amendment document references the original Agreement and indicates a change. Expired contracts may ONLY be amended if: Agreement's end date was dependent on project completion or production of deliverables and actual calendar end date was unclear or undefined. Agreement expired less than 30 days ago. Amendments may be processed to changes to scope, terms, price, length and may be 		
	Questions	×			
	Header Informa	ation V AI	Amendments may be processed to changes to scope, terms, price, length and may be used to introduce renewal terms.		
	Departmental Ir	ormation Th	 This form should NOT be used for: 1. Renewing Agreements that already have renewal terms. A renewal defined in the original Agreement should be requested with a Contract Renewal Form. 2. Processing a new year of a service where the quote does not reference the original agreement. These situations are processed through a new contract request. 		
	Supplier Contac	ct Informat			
	Funding Information	ation 🗸			
	Sourcing Inform	nation 🗸			
	Review and Comple	ete			
	Discussion				
Contract Request		Vorkflow			
	Next >			Next >	
DETAILS					
DETAILS	/ly Contract Requests				
Constants	My Contract Requests	Details		You can modify the request name if	
CETAILS	Ay Contract Requests Iment 1 Inber: 920695 status: Incomplete	Details Contract Request Na	ame * [Amendment 1	You can modify the request name if necessary.	
C Back to M Amenda Form Num Request S Instruction	Ay Contract Requests Iment 1 Inber: 920695 Status: Incomplete	Details Contract Request Na Template	ame * Amendment 1 Amendment Request Form	You can modify the request name if necessary. Right -click on the Contract Number	
C Back to M Amendi Form Num Request S Instruction Details	My Contract Requests Iment 1 Inber: 920695 Status: Incomplete	Details Contract Request Na Template Contract Type	ame * Amendment 1 Amendment Request Form	You can modify the request name if necessary. Right -click on the Contract Number Hyperlink to open the record in a new	
C Back to M Amenda Form Num Request S Instruction Details Attachme	Ay Contract Requests Iment 1 Inber: 920695 Istatus: Incomplete Inc	Details Contract Request Na Template Contract Type Description	ame * Amendment 1 Amendment Request Form - 02-18-2024	You can modify the request name if necessary. Right -click on the Contract Number Hyperlink to open the record in a new window. Double check that the contract	
C Back to M Amenda Form Num Request S Instruction Details Attachme Question	Aly Contract Requests Iment 1 Inber: 920695 Status: Incomplete ons ents	Details Contract Request Na Template Contract Type Description Contract Request Typ	ame * Amendment 1 Amendment Request Form - 02-18-2024 pe Amend Contract	You can modify the request name if necessary. Right -click on the Contract Number Hyperlink to open the record in a new window. Double check that the contract number is correct. If the number is not correct, you will need to delete the	
C Back to M Amenda Form Num Request S Instruction Details Attachme Question Heade	Aly Contract Requests Iment 1 Inber: 920695 Status: Incomplete ons ents 0 ks v er Information v	Details Contract Request Na Template Contract Type Description Contract Request Typ Contract	ame * Amendment 1 Amendment Request Form - 02-18-2024 pe Amend Contract 2020-000067-SPA-PRO	You can modify the request name if necessary. Right -click on the Contract Number Hyperlink to open the record in a new window. Double check that the contract number is correct. If the number is not correct, you will need to delete the request and restart.	
C Back to M Amenda Form Num Request S Instruction Details Attachmed Question Heade Depar	Ay Contract Requests Iment 1 Inber: 920695 Istatus: Incomplete ons ents ents is is is is is is incomplete is	Details Contract Request Na Template Contract Type Description Contract Request Typ Contract Include latest version	ame * Amendment 1 Amendment Request Form - 02-18-2024 pe Amend Contract 2020-000067-SPA-PRO n of O Yes O No	 You can modify the request name if necessary. Right -click on the Contract Number Hyperlink to open the record in a new window. Double check that the contract number is correct. If the number is not correct, you will need to delete the request and restart. 	
C Back to M Amenda Form Num Request S Instruction Details Attachme Question Heade Depar Backg	Aly Contract Requests Imment 1 Inber: 920695 status: Incomplete ons ents 0 remains 1 ons ents 0 er Information 1 ground Information 1 Information	Details Contract Request Na Template Contract Type Description Contract Request Typ Contract Include latest version attachments? *	ame * Amendment 1 Amendment Request Form - 02-18-2024 pe Amend Contract 2020-000067-SPA-PRO n of O Yes O No	You can modify the request name if necessary. Right -click on the Contract Number Hyperlink to open the record in a new window. Double check that the contract number is correct. If the number is not correct, you will need to delete the request and restart.	
C Back to M Amendi Form Num Request S Instruction Details Attachme Question Heade Depar Backg Suppl	Ay Contract Requests Iment 1 Inber: 920695 Status: Incomplete ons ents 0 remental Information 1 incomplete ons er Information 1 incomplete incomplete ons 1 incomplete incom	Details Contract Request Na Template Contract Type Description Contract Request Typ Contract Include latest versior attachments? *	ame * Amendment 1 Amendment Request Form - 02-18-2024 pe Amend Contract 2020-000067-SPA-PRO n of O Yes O No	You can modify the request name if necessary. Right -click on the Contract Number Hyperlink to open the record in a new window. Double check that the contract number is correct. If the number is not correct, you will need to delete the request and restart.	
CETAILS C Back to M Amenda Form Num Request S Instruction Details Attachme Question Heade Depar Backg Suppl Fundi Source	Ay Contract Requests Iment 1 Inber: 920695 Status: Incomplete ons ents ents ents is	Details Contract Request Na Template Contract Type Description Contract Request Typ Contract Include latest version attachments? *	ame * Amendment 1 Amendment Request Form - 02-18-2024 pe Amend Contract 2020-000067-SPA-PRO n of O Yes O No	You can modify the request name if necessary. Right -click on the Contract Number Hyperlink to open the record in a new window. Double check that the contract number is correct. If the number is not correct, you will need to delete the request and restart. It is IMPORTANT at this ste to select YES to include the	
C Back to M Amenda Form Num Request S Instruction Details Attachme Question Heade Depar Backg Suppl Fundi Source Review a	Ay Contract Requests Ay Contract Requests Iment 1 Inber: 920695 Status: Incomplete ons ents 0 ents 0 er Information 1 ing Information 1	Details Contract Request Na Template Contract Type Description Contract Request Typ Contract Include latest versior attachments? *	ame * Amendment 1 Amendment Request Form - 02-18-2024 pe Amend Contract 2020-000067-SPA-PRO n of O Yes O No	You can modify the request name if necessary. Right -click on the Contract Number Hyperlink to open the record in a new window. Double check that the contract number is correct. If the number is not correct, you will need to delete the request and restart. It is IMPORTANT at this stee to select YES to include the latest version of	
Certails Certails Commonstrains Certails Certails Attachme Question Heade Depar Backg Suppl Fundi Source Review at	Ay Contract Requests Iment 1 Inber: 920695 Istatus: Incomplete ons ents 0 Is 1 Information 1 Informa	Details Contract Request Na Template Contract Type Description Contract Request Typ Contract Include latest version attachments? *	ame * Amendment 1 Amendment Request Form - 02-18-2024 pe Amend Contract 2020-000067-SPA-PRO n of O Yes O No	 You can modify the request name if necessary. Right -click on the Contract Number Hyperlink to open the record in a new window. Double check that the contract number is correct. If the number is not correct, you will need to delete the request and restart. It is IMPORTANT at this step to select YES to include the latest version of attachments. This will 	
Carrier of the second s	Ay Contract Requests Ay Contract Requests Iment 1 Inber: 920695 Status: Incomplete ons ents 0 ents 0 ents 0 information 0 ing Information 0 ing Informatio	Details Contract Request Na Template Contract Type Description Contract Request Typ Contract Include latest versior attachments? *	ame * Amendment 1 Amendment Request Form - 02-18-2024 pe Amend Contract 2020-000067-SPA-PRO n of O Yes O No	 You can modify the request name if necessary. Right -click on the Contract Number Hyperlink to open the record in a new window. Double check that the contract number is correct. If the number is not correct, you will need to delete the request and restart. It is IMPORTANT at this step to select YES to include the latest version of attachments. This will continue to keep all prior 	
Contract	Ay Contract Requests Iment 1 hber: 920695 itatus: incomplete ons ents 0 is 0 is 0 in Information 0 ing Information 0	Details Contract Request Na Template Contract Type Description Contract Request Typ Contract Include latest version attachments? *	ame * Amendment 1 Amendment Request Form - 02-18-2024 pe Amend Contract 2020-000067-SPA-PRO n of O Yes O No	 You can modify the request name if necessary. Right -click on the Contract Number Hyperlink to open the record in a new window. Double check that the contract number is correct. If the number is not correct, you will need to delete the request and restart. It is IMPORTANT at this step to select YES to include the latest version of attachments. This will continue to keep all prior amendments and the origin 	

5	ATTACHMENTS: Attach	all relevant documents for y	our request for Procurement to	o review. Examples include:
	Quote or written desc additional informatio	cription of change, Competiti n When finished Click " Ne x	/e Quotes, Exemption Justificati + ″	ons (if applicable), and other
			• •	
		Back to My Contract Requests		
	_	Test contract	Attachments	
		Form Number: 442208 Request Status: Incomplete	Add Attachments	
		Instructions		
	_	Details		
		Attachments 0		
		Questions 🗸		
	-			
	submit your request.	Click " <i>Next"</i> . Questions		
		Overview	Progress	
		Header Information	💿 Incomple	te
		Departmental Information	💿 Incomple	te
		Background Information	Incomple	.te
		Supplier Contact Information	Incomple	.te
		Funding Information	Incomple	te
		Sourcing Information	Incomple	.te
7	HEADER INFORMATION:	The first thing you should no	ptice is that the information fro	m the contract vou selected
				· · · · · · , · · · · ,
	to Amend has been p	ulled into the request for you	I. Iance below When complete C	lick "Save Progress" and

✓ On This Page	
Header Information (5)	
Contract Summary (1)	
✓ Header Information	
Please review the information below and update the Start and Date of the Amendment and has no impact on the start date (End date. The Start Date will be the Start
should only be modified if the Amendment indicates that the	End date of the original agreeme Original Contract Number: This form will
change. End Date should align to the original agreement.	pull in the number of the contract you a
Contract Number you are requesting to Amend *	amending. This field cannot be edited.
2020-000067-SPA-PRO	
	Supplier: The Supplier will pre-populate for you. O
Supplier * O	change in the event the supplier has changed due t
	acquisition, merger, re-branding etc.
BEST BUY STORES LP X Q	
	Additional Second Parties: The second party will r
Additional Second Parties	nonulate for you. Change this section only if there
Tupe to filter	populate for you. Change this section only if there
	modification to be made to add, remove or change
	Second Party.
Start Date * 😧	
04/23/2021	
mm/dd/yyyy	Start and End Dates: This information should be fou
Update Start Date Upon Execution	in the amendment document. If no specific start date
	provided it is presumed the amendment will be in eff
End Date * 😯	upon execution so, check off the box "Update Start D
Expires On O No Expiration O Term	Lipon Execution" Only undate the dates as needed
04/23/2022	
mm/dd/yyyy	
	Renewals: This form SHOULD NOT be used to exec
Auto-Renew	renewals. Amendments however, can be processed
🔿 Yes 💿 No	add or modify the existing renewal terms of a centre
Renewal Term	Only make changes here if the Amendment docum
	specifically indicates changes to existing renewal ter
Years V	AUTO RENEW SHOULD ALWAYS BE SET TO "NO"
Renewals Remaining	
1	
	Amendment Value: Provide a Positive or Negative va
Amendment value * 9	depending on the change associated with
	amendment. If there is no change to the cost of
	original Contract enter \$0.00
✓ Contract Summary	
Specify the exact change being requested and provide a reas	on for the change. Examples include
abanges to dates, east seens of work or terms	
changes to dates, cost, scope of work, or terms.	
Summary *	ick here Contract Summary: Should clearly outline all
Summary *	add a Contract Summary : Should clearly outline all changes being requested and the reason for the chan

8	All Other questi contract reques details on each	on fields of this for t and should be re section see the N	orm will be identical to, or sin eviewed for accuracy and up 1anual for " <u>How do I Request</u>	mpler than a NEW dated as required. For t a Contract in BMP? "		
9	REVIEW AND COMPLET	E: Once all the sections	s have been completed, review each s	section for accuracy and Click		
	"Complete Request".					
	< Back to My Contract Requests					
	Contract job-aid VO Form Number: 444388	Review and Complete	Print Request History ?			
	Request Status: Incomplete	required inclus complete	Pressure			
	Instructions	Section	Progress			
	Details	Instructions				
	Attachments 1	Details	No Required fields			
	Questions 🗸	Attachments	Vo Required fields			
	Header Information 🗸	Questions	Required fields complete			
	Departmental Information	Header Information	 Required fields complete 			
	Background Information 🗸	Departmental Information	Required fields complete			
	Supplier Contact Informat ✔	Background Information	Required fields complete			
	Funding Information	Supplier Contact Information	Required fields complete			
	Sourcing Information	Funding Information	Required fields complete			
	Review and Complete	Sourcing Information	Required fields complete			
10		Confirm Are you sure are ready to	o complete your new contract request?	No		
11	NEXT STEPS:					
	 Contract (Amendment) Request will be routed to Procurement for Review Once your Contract (Amendment) Request has been approved, your Contract Request will change first to a status of <i>Approved</i> and then to <i>Complete</i>. Procurement will use the information on the request to start the amendment process on the existi Contract Record. You should receive notification of status changes to the Contract Record as it proceeds through workflow via email. 					
	For more inf	ormation visit our <u>Con</u>	utract Administration web page.			