

Amending a Contract

You can modify an executed contract using the Amend feature if you are the Contract Administrator. You will not be able to modify an executed contract's Contract Type, Parent Contract Number & Name, Legal Entity, Supplier or the Mode of the Contract.

1. Display the **Contract** you would like to amend.
An executed contract's status will be displayed as "Live" in the top blue bar.
2. Click **Actions**
3. Click **Amend**
4. The contract opens in draft form and the status changes to "**Draft Amendment.**" The **Type** field of the contract language document changes to "**Amended Copy.**"
5. Select the appropriate language document (by checking the checkbox) and then click the **Download** icon to download the document. Make changes to the contract language document offline and then upload it (along with any additional documents to be added to the amended contract).
6. When you have finished making changes to the language document, click the **+ icon** to upload it.
7. The uploaded document(s) will display as **Draft Copy** in the **Type** field.
8. Resubmit the contract for internal and supplier signature by clicking the **Action** menu. Select either **Send for Signature** or **Send for**

BASIC DETAILS

Contract Name: Collection Services
Contract Number: 40588
Document Type: Agreement
Contract Type: Services Agreement
Contract Administrator: Darryl Dearborn

CONTRACT LANGUAGE - Presigned Mode

Name	Comments	Contract Administrator	Modified By	Status	Type	Modified On	Version
Original Contract-Purchasing, Independent Contractor, Prof...		Jason Coolidge	Jason Coolidge		Draft Copy	05/21/2018	1
Original Contract-Purchasing, Independen...		Jason Coolidge	Jason Coolidge		Amended Copy	05/21/2018	1

Amend Action Menu: Terminate, Copy Contract, Export, Track Status, Close, Change Contract Administrator, Amend, Audit Trail

Buttons: KAREN QRG CONTRACT 4, DRAFT AMENDMENT

Quick Reference Guide

Supplier Signature depending on your workflow. (In the screenshot shown in this QRG, the amended contract was sent to the internal signature first.)

9. After obtaining an internal signature, click **View Amendment**.
10. Click **Send for Supplier Signature**. Refer to the *Route for Signature QRG* for additional details on routing for internal and supplier signature.
11. Once both parties have signed, the Amendment is now active and the **Contract Status** changes back to 'Executed.'
12. Once the amended contract goes into effect, the 'Revision 1' will be shown next to the Contract Number.

(See Tips and Warnings on Page 3)

The screenshots illustrate the workflow for amending a contract in the CalUSource system. The first screenshot shows the 'Actions' menu with 'Send For Supplier Signature' highlighted. The second screenshot shows the 'Amendment is in Progress' screen with 'VIEW AMENDMENT' highlighted. The third screenshot shows the 'Amendment is in Progress' screen with 'SEND FOR SUPPLIER SIGNATURE' highlighted. The fourth screenshot shows the 'Executed' screen with 'Contract Number 2017.000775(Revision 1)' highlighted.

Tips

- All historical contracts loaded from previous systems have the original contract number assigned to it.
- Currently, you can only amend a contract that you created. If you are trying to amend on behalf of someone else, please contact the Help Desk to request it be changed. This process will take approximately 24 hours to complete.

Warning

- Once the contract is executed, the contract becomes live and non-editable. If you want to continue amending the contract at a later date, save the contract. Do not forward the contract for signature until you are done making changes so that it won't be executed until complete.