



PSC Agreement
Training Document

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Overview

The Expense Contracts application allows you to create a downstream Contract against your budget.

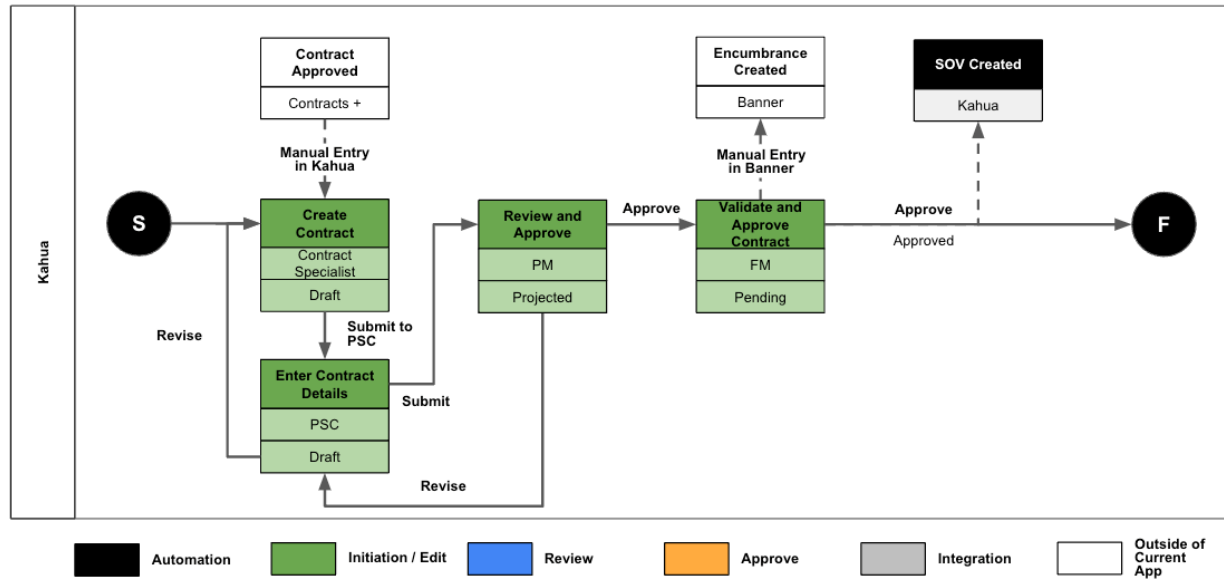
The system will track the Schedule of Values for the contract. Cost amounts are tracked in Work Breakdown according to status.

To access the Expense Contracts application, open the Apps repository. Under the Cost Management suite of applications click on Expenses.

This will launch the Expenses Applications which will include:

- **Contracts**
- Change Orders
- SOV Breakdown
- Pay Requests
- Purchase Orders
- Purchase Order Change Orders
- Invoices
- Compliance Tracking

Workflow



Create a Contract

1. Only Contract Specialists will initiate a contract.
2. To create a new Contract, navigate to the appropriate project and go to the Expense Application.
3. Select the **Contracts** tab, then click the **New** button to open a new Contract.
4. A new form will open on the right side of the screen.
5. Under Details, leave the “SOV Breakdown” and “Associate CO Lines to Contract Lines” boxes checked.
6. Populate the Contract Details such as:
 - a. Contract Number: Enter the contract number (CN) from Contracts+ or the university retainer work order number.
 - b. Description: Include enough contract name information in the title to help distinguish one contract from the other in Kahua.
 - c. Type: For this guide select PSC Agreement.
 - d. IPHEC bulletin #
7. Funding information will be entered by the Financial Manager later in this process.
8. For the Retainer Contract field add the CN# from Contracts+ for the overall retainer agreement, if applicable.
9. For the Retainer Wok Order field, add the University work order number, if applicable.
10. In the Parties section, select the From Contact for this contract, which will likely be the project manager for the project.
 - a. After selecting the Contact, the Company Name, Company Office, and Company Address will automatically populate.

Contract - 0013

Total Save To Calculate...

DETAILS

Contract Number
0013

Date
2/19/2024

Description
Training Guide

☒ Use SOV Breakdown

SOV

☒ Associate Change Order Lines to Contract Lines

Type
PSC Agreement

Encumbrance Number

Charge Code

Account Code

Save / Close

SECTIONS

- DETAILS
- PARTIES
- SCOPE
- INTERNAL NOTES
- ITEMS
- COMMENTS
- REFERENCES

- b. If multiple Company Offices exist, the single select drop down list will populate with the choices. Select the appropriate office.
11. In the Parties section, select the To Contact i.e. who the PSC Contact should be on the Contract.
 - a. After selecting the Contact, the Company Name, Company Office, and Company Address will automatically populate.
 - b. If multiple Company Offices exist, the single select drop down list will populate with the choices. Select the appropriate office.
12. In the Scope section enter the Contract Amount, as it is a required field, and any other relevant information in the Scope of Work and Addenda fields.
13. Internal Comments, Notes, and References are also available to add more information.
 - a. Note: Internal Notes will not be shown to external vendors during the process.
14. For the PSC Agreement the Items grid will not be editable to the Contract Specialist and can only be filled in by the PSC during the process.
15. Documents can be attached to the record under the References section. Upload an executed agreement from Contracts+ and any other supporting documentation. The user can either:

▼ SCOPE

\$ Contract Amount
Field is required.

Scope of Work

Addenda

▼ REFERENCES

☐ ☐
 UPLOAD ADD KAHUA DOC EDIT MARKUP UPDATE REMOVE DOWNLOAD ADD COMPOSITE ADD APPROVAL DOC

<input type="checkbox"/>	↓ TYPE	DESCRIPTION	CONTRIBUTOR	DATE	SIZE	MARKUP?	INCLUDE ON SEND	INCLUDE MARKUP ON SEND	IS CURRENT	PREVIEW STATUS	COMMENTS

- a. **Upload** a document saved on their computer.
- b. **Add Kahua Doc** to reference a document that is stored within Kahua's File Manager application.
- c. **Add Approval Doc** which is used anytime a record is being routed for Review or Signature.

Once all details have been filled out, click **Save/Close** and then click on **Submit to PSC**.

Contract Action Buttons

Once the fields within the record have been completed and saved, the users can select from several actions:

SEND	EDIT	DELETE	HISTORY
-------------	-------------	---------------	----------------

- **Send** – Use messaging to send record details to others (NOT to be confused with a workflow)
- **Edit** – Update and maintain the record
- **Delete** – Select this action button to delete a record (typically permission based, so all may not see this)
- **History** – All updates/changes are tracked

Send

- Do not confuse **Send** with using the workflow buttons in any application
- Documents can be sent via a message within Kahua to either existing Kahua users or users outside of Kahua by entering their email address and clicking **Enter**
- The documents are treated as attachments, and the message can be copied to the **Communications** application by checking the box

Edit

- The record can be updated as needed during the process
- If the document is out for Review or Signature, **Edit** will not be available

History

- The **History** action button provides details regarding all activity (Creation, Updates, Saves, etc.) performed on the record
- To see specific details related to the updates made, click the View Edit button

PSC Step of PSC Agreement

1. The To Contact in the Parties section will receive a Task & email notification when the contract is ready for their input of Contract/Agreement line items. They can edit the contract by:
 - a. Clicking on the Task.
 - b. Clicking **View Source Record** to navigate to the Contracts App.
 - c. Clicking **Edit**.
2. The PSC can review the Details section of the contract. This section is not editable.
3. The PSC can now fill out the:
 - a. Scope of Work
 - b. Dates
 - c. Contract Items (Items Grid)
4. The PSC may also add comments and attach documents, such as the University Input Worksheet, in the References section.

View Source Record >

Total

> SECTIONS

Please click on the View Source Record Link and edit to add the details.

DETAILS

Contract Number	0013
Date	2/19/2024
Description	Training Guide
Use SOV Breakdown	Yes
SOV	
Associate Change Order Lines to Contract Lines	Yes
Type	PSC Agreement
IPHEC bulletin #	
Assigned To	Data Migration
Workflow Status	PSC Update
View Template	View Name: Contracts Template Name: Default

DETAILS

PARTIES

SCOPE

DATES & WORKFLOW

ITEMS

AE SUBCONSULTAN...


AE HOURLY RATE S...

COMMENTS

REFERENCES

Adding Items

1. To add Contract line items, navigate to the Items grid.
 - a. To add multiple line items, enter the number of lines you will need and click **Insert**.
 - b. Select the applicable activity codes and fill out the remaining details regarding this record. Coordinate with the university Project Manager to determine which activity codes should be used for the contract.
 - c. Select the appropriate Phase for each line item, such as Schematic Design, Design Development, etc., as applicable, to match the Professional Services Agreement.

- d. In the Description field, add any other details, such as Fixed Fee, Hourly, or any other descriptor for that line item.
 - e. Add the dollar value per line item.
 2. To view the Contract Items in further detail, click the more details  icon next to the Item number.
 - a. In this view, the PSC may enter additional detail on the item such as the Scope of Work, Notes, and additional Comments.
 - b. Use the Previous and Next action buttons to sort through the Items if needed.
 - c. Click **Close** on the item when complete.
 3. Click **Done** once details have been added to the Items grid.
 4. Note: The Items total must be EQUAL to the Contract Amount defined in the Scope.
 5. Add any additional Comments and References and once done click **Save/Close** for future editing or click on **Submit to PM**.

Project Manager Step of PSC Agreement

1. The Project Manager selected in the Project Details will receive a Task & email notification when the contract is in their court for review. They can view the contract by:

- a. Clicking on the task,
- b. Clicking **View Source Record** to navigate to the Contract App,
- c. Clicking **Edit**.

2. The Project Manager can now:

- a. Update Internal Notes
- b. Add Comments.
- c. Add additional References.
- d. Review all information

entered by the Contract Specialist and the PSC in the previous steps.

3. Once all information has been reviewed, the Project Manager can click **Save/Close** to edit later, **Return for Revision** to return the contract to the PSC for updates, or **Submit to FM** to advance the contract to the next approver.

The screenshot displays the 'View Source Record' interface. At the top right, it shows 'Total \$100,000.00' and a '> SECTIONS' link. Below this is a 'DETAILS' section with a dropdown arrow. The details are organized into two columns. The left column lists fields: Contract Number (0013), Date (2/19/2024), Description (Training Guide), Use SOV Breakdown (Yes), SOV, Associate Change Order Lines to Contract Lines (Yes), Type (PSC Agreement), IPHEC bulletin #, Assigned To (Data Migration), Workflow Status (PM Review), and View Template. The right column shows 'View Name: Contracts' and 'Template Name: Default'. The 'PM Review' status is highlighted with a red box. On the right side, there is a vertical sidebar menu with the following items: DETAILS, PARTIES, SCOPE, INTERNAL NOTES, DATES & WORKFLOW, ITEMS, AE SUBCONSULTAN..., AE HOURLY RATE S..., COMMENTS, and REFERENCES.

View Source Record >		Total \$100,000.00	> SECTIONS
DETAILS			DETAILS
			PARTIES
			SCOPE
			INTERNAL NOTES
			DATES & WORKFLOW
			ITEMS
			AE SUBCONSULTAN...
			AE HOURLY RATE S...
			COMMENTS
			REFERENCES

DETAILS	
Contract Number	0013
Date	2/19/2024
Description	Training Guide
Use SOV Breakdown	Yes
SOV	
Associate Change Order Lines to Contract Lines	Yes
Type	PSC Agreement
IPHEC bulletin #	
Assigned To	Data Migration
Workflow Status	PM Review
View Template	View Name: Contracts Template Name: Default

Financial Manager Step of PSC Agreement

1. The Financial Manager selected in the Project Details will receive a Task & email notification when the contract is in their court. They can access the contract where they can enter the Encumbrance Number, Charge Code & Account Code by:

- a. Clicking on the task.
- b. Clicking **View Source Record** to navigate to the Contracts App.
- c. Clicking **Edit**.

2. The Financial Manager can now:

- a. Add an Encumbrance Number.
- b. Select a Charge Code from the ones entered in the Project Details.
- c. Add an Account Code.
- d. Add additional References.
- e. Review all Information entered by the Contract Specialist, the PSC, and the Project Manager in the previous steps.

3. Once all information has been reviewed, the Financial Manager can click on **Save/Close** to edit later, **Return for Revision** to return the contract for updates, or **Approve**, which will Approve the Contract as the Financial Manager is the last step of this process.

The screenshot displays the 'View Source Record' interface. At the top right, it shows 'Total \$100,000.00' and a '> SECTIONS' link. A sidebar on the right contains a menu with the following items: DETAILS (selected), PARTIES, SCOPE, DATES & WORKFLOW, ITEMS, AE SUBCONSULTAN..., AE HOURLY RATE S..., COMMENTS, and REFERENCES. The main content area is titled 'DETAILS' and contains a table of contract information:

Contract Number	0013
Date	2/19/2024
Description	Training Guide
Use SOV Breakdown	Yes
SOV	
Associate Change Order Lines to Contract Lines	Yes
Type	PSC Agreement
Encumbrance Number	
Charge Code	
Account Code	
IPHEC bulletin #	
Assigned To	
Workflow Status	Data Migration
View Template	FM Review
	View Name: Contracts
	Template Name: Default

On Approval of PSC Agreement

1. Once the PSC Agreement has been approved the PSC, Project Manager, and Risk Management (selected in the Project Details), will receive an email & Kahua notification letting them know that the PSC Agreement/Contract has been Approved.
 - a. The Project Manager & Financial Manager can edit the details section of the contract after approval.
2. The PSC selected in the To Parties section will receive an additional notification letting them know that they can navigate to the Contract in the Contracts Application in Kahua and start the entry of the Schedule of Values.
3. To do this navigate using the Project Finder by:
 - a. Clicking on Project Finder in the left side Navigation,
 - b. Selecting the Project where the Contract was created.
4. You can also use the Search functionality in the Project Finder to locate you project by:
 - a. Clicking on Project Finder in the left side Navigation,
 - b. Clicking on the Magnifying Glass icon next to Recent Projects, as shown in the image,
 - c. Type out the Project Name or number and click on the project.
5. Once in the project go to the Expense Application by clicking on Apps, then All Apps, and then searching for Expenses using the Search Bar.
6. Once in Expenses, select the Contracts tab, then click on the Approved contract. The Contract will open on the right side of the screen.
7. Click on the **Process to SOV** button located at the bottom of the Contract.
 - a. This will automatically navigate the PSC to the SOV Breakdown application in Kahua where the Schedule of Values can be entered and broken down.
8. Refer to the Schedule of Values (SOV) Training Guide on how to use the SOV Application.

