# Creating a Contract – Capital Programs

Some fields have **Help Text** (gray question mark icon) in the Contracts+ system to provide you with more information on how to accurately fill out the field. More detailed descriptions of each field can be found on the *Contract Field Descriptions – Capital Programs* job aid.

Items with asterisks are required fields that must be completed before submitting a contract.

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## Creating a Contract

1. Navigate to **Contracts** > **Contracts** > **Create New Contract…**
2. Enter the **Contract Name**.
   a. **NOTE:** See Contract Field Descriptions – Capital job aid for entering the appropriate **Contract Name**.
3. Select the **Contract Type** that applies.
   a. Capital - Capital Programs
   b. Capital – Amendment
   c. Capital – Change Order
4. For **Use Contract Template**, select **Yes** if you are creating Capital Program contract.
   a. This field does not appear for Amendments and Change Orders.
5. For **Contract Template**, select the appropriate university for generating Contracts from the list shown below. For example, the University of Illinois Chicago would select **Capital Chicago Contracts.**
   a. Capital Chicago Contracts
   b. Capital Springfield Contracts
   c. Capital System Office Contracts
   d. Capital Urbana Contracts
6. **Work Group** should be prepopulated with the appropriate work group for contracts, not for Amendments and Change Orders. You will need to select the appropriate work group.
7. Do not select any **Main Document Template**.
8. Click **Create Contract**.

# Completing the Contract Header Sections

The Contract Number for this new contract will already be assigned by the system. In addition, the Contract Name, Contract Type, and Work Group will be automatically populated from fields filled out during the previous section.

## Contract Header

1. Enter the **Parent Contract** for amendments and change orders to link them to the parent contract. This link will be shown in the **Contract Family** in the lower left corner of the Contracts+ navigation area.
    a. **NOTE:** When copying a parent contract, all of this information will be carried over for the amendment/change order but will need to be edited. For example, contract value will need to be changed from the parent contract value to the amendment/change order value. See Creating a Amendment/Change Order below to identify the steps needed to create the Amendment/Change Order.
2. For **Use eSignature for this contract?**, select **Yes** if not already prepopulated.
3. For **Show on Supplier Portal**, select **Inherit from General Contract Settings – Current Setting: No**.
    a. **NOTE:** This field is an indicator as to whether the contract is configured to be shared with Second Parties (and therefore viewable by a supplier in the Supplier Profile). **Yes** indicates that the contract can be shared. **No** indicates that it cannot be shared.
    b. **NOTE:** When performing a contract search, leave the field blank to return all contracts regardless of sharing status.
4. Enter the Contract, Change Order or Amendment **Value**.
5. Click **Edit Summary** to enter the **Summary/Description of Goods/Services**.
6. Click **Save Progress** at the lower right corner.

## Contract Parties

If your second party is not found in the drop-down listing from Banner or if information is incorrect or missing, the vendor will need to fill out and submit a Vendor Information Form (VIF). The VIF and instructions can be found on the Vendor Setup and Update website.

7. Click **Add** Party.
8. Select **Second Party** from the drop-down menu.
9. Enter the Second Party name and/or click the magnifying glass to search the second party name.
10. Choose a Contact Party.
11. Click **Select Contract Party**.

12. **Choose a Contact** from the drop-down menu.
13. Click **Next**.
14. **Choose an Address** from the drop-down menu.
15. Click **Done**.

## Dates and Renewals

16. Enter the **Start Date**.
    a. **NOTE:** Start date is the intended first date of the contract term.
17. Select **Update Start Date Upon Execution**.
18. Enter the **End Date**.
    a. **NOTE:** End Date should be the substantial completion date of the contract.
19. Enter the **Review Date, Review Term, Reviews Remaining, Renewals Remaining and Renewal Term**.
    a. **NOTE:** Leave blank if these are not applicable to your request.
20. For **Automatically Apply Price File with Renewal**, select **No**.

## General Contract Info

21. Select the appropriate **Chart**, **College Code**, and **Organization.**
    a. **NOTE:** The **Chart**, **College Code**, and **Organization Code Capital Contract Type** may be automatically populated from fields filled out during the previous section. More information can be found on the *Contract Field Descriptions – Capital Programs* job aid for the codes to be used.
22. For **Document Source**, select **Template No Changes**
23. Enter a description of the **Deliverables/Work Product**.
24. For **Contract Category**, select **Payable.**
25. For **Contract Office**, select the appropriate Capital Campus Office.
26. For **Capital Contract Type**, select the appropriate contract type.
27. For **Are you creating Capital Main Document Templates?**, select **No**.

## Foreign Entity Reporting

28. **Is the second party a Foreign Source or the Agent of a Foreign Source?** – Select **Yes** or **No**.

a. If **Yes**, answer the following additional questions that appears:

   i. **If the Second Party is the Agent of a Foreign Source, provide the name of the Foreign Source being represented by the agent. Otherwise, indicate "Not Applicable".**

   ii. **If the Second Party is the Agent of a Foreign Source, provide the complete business address of the Foreign Source being represented by the agent. Otherwise, indicate "Not Applicable".**

   iii. Select the **Status of Foreign Source**.

   iv. **Describe any contract terms regarding the employment, assignment, or termination of faculty. If none, answer "None".**

   v. **Describe any contract terms regarding the selection or admission of students. If none, answer "None".**

   vi. **Describe any contract terms establishing departments, centers, research or lecture programs, or new faculty positions. If none, answer "None".**

   vii. **Describe any terms regarding the award of grants, loans, scholarships, fellowships, or other forms of financial aid restricted to students of a specified country, religion, sex, ethnic origin, or political opinion. If none, answer "None".**

   viii. **If known, what is the GAR Account Number or unit CFOP?**

## Second Party Information

29. Enter the **Second Party DBA** if they are doing business as another name.

## Unit Info

This section is entered only for contracts, not change order or amendments.

30. Enter the **Unit Name**.
31. Enter the **Unit Contact Name** who is generating the contract.
32. Enter the **Unit Address**.
33. Enter the **Phone number** of the unit contact generating the contract.
34. Enter the **Email** of the unit contact generating the contract.

## Capital Info

35. Select the **Method of Procurement**. For contracts only.
36. Enter the **Bulletin Procurement Number**. For contracts only.

37. For **Diversity Goal**, select **Yes** or **No**.
    a. **NOTE: <u>For Capital, ONLY SELECT Yes IF</u>** this document is a Professional Service or Construction contract that is NOT being tracked in PRZM.
38. Enter the **Banner Vendor Number**. For contracts only.
39. Enter the **Encumbrance Number**. For contracts only.
40. Enter the **BOT Approval Date**. For contracts only.
41. Enter the **PPB Approval/Waiver Date**. For contracts only.
42. Enter the **Project Name (FCPWeb Name Preferred)**.
43. Enter the **Capital Project Number (FCPWeb Project # Preferred)**.
44. Enter the **Project Owner**. For contracts only
45. Enter **Site Address**.
46. For **Is this a Retainer?**, select **Yes** or **No**.
47. Select the **Agreement Location**.
48. Select the **Project Location**.
49. Enter the **Project Address.**
50. For **Is CM involved?**, select **Yes** or **No**.
51. Click **Save Progress**.
52. Click **Next**.

## Creating a Change Order or an Amendment

1. Obtain change order from Upside or amendment from PRZM.
2. Search for the Parent contract of the Amendment or Change Order.
    a. **NOTE:** Please refer to the *Searching for Contracts in Contracts+* job aid for steps on searching for a contract.
3. Once the Parent Contract is found, open the Parent Contract.
4. Click **Contract Actions** and select **Copy**.
5. Rename the **Contract Name** field to reflect which Change Order or Amendment is being generated.
6. For **Contract Type**, select either Capital – Amendment or Capital – Change Order as appropriate.
7. Click **Save Changes**.
8. Enter the appropriate **Start** and **End Dates** for the Amendment or Change Order.
9. Click **Copy**.
    a. **NOTE:** Copying the Parent Contract will allow all the Header and other information from the Parent to be reused for the Amendment or Change Order so that this metadata does not have to be reentered. But some of the data will need to be edited as shown in the following steps.
    b. **NOTE:** A new Contract Number will be generated for the Amendment or Change Order.
10. Enter the **Parent Contract** CN # for amendment or change order to link them to the Parent Contract. This link will be shown in the **Contract Family** in the lower left corner of the Contracts+ navigation area.
    a. **TIP:** Only enter the number after the prefix "CN-" for the parent contract and select the CN # for the parent contract which will appear below.
11. Edit the **Summary / Description of Goods / Services** as appropriate.
12. Replace the dollar value in the **Value** box with the Amendment or Change Order Value.
13. Click **Save Progress** at the bottom of the page.
14. Review the remaining information on the Contract Header and edit as needed and click **Save Progress** at the bottom of the page.
15. Click on **Amount** and enter the dollar value of the Amendment or Change Order and click **Save Progress** at the bottom of the page. This value will determine the Approval workflow.
16. Upload the appropriate documentation for the Amendment or Change Order as shown in the **Uploading Contract Attachments** section in this job aid.

17. Review the eSignature signer name and revise if needed as shown in the **Setting Up the eSignature Signers** section in this job aid.

18. Click **Save Progress** at the bottom of the page.

## Uploading Contract Attachments

Prior to uploading the contract, including contracts, amendments and change orders that were generated out of Upside and PRZM prior to 11/01/2021, as an attachment, find all the boilerplate Comptroller signature blocks (possibly more than one) and remove them to allow the Comptroller signature to be placed in that area. See the following boilerplate area in red that needs to be removed below:

OWNER:

~~THE BOARD OF TRUSTEES OF THE UNIVERSITY OF ILLINOIS~~

~~By:~~

~~Paul N. Ellinger, Interim Comptroller~~ DATE

1. Click **Add Attachments**.
2. For **Attachment Type**, select **Add My Own**.
3. Click **Select files...** to add the appropriate contract attachment.
4. For **Print with Full Contract**, select **Yes** or **No**.
5. For **Contract Summary Visibility**, select **Use the Summary Configuration Settings** or **Admin/Managers Only**.
6. Click **Save Changes**.
7. Click **Next**.

## Setting Up the eSignature Signers

1. Click **Add Signer**.
2. For **Contract Party**, select **THE BOARD OF TRUSTEES OF THE UNIVERSITY OF ILLINOIS**.
3. For **Choose a Contact**, select the appropriate contact per the following guidance:
    1. For Professional Services Contract,
        a. Contracts that are < $1,000,000 – Mike Wilson will sign.
        b. Contracts that are ≥ $1,000,000 – Paul Ellinger will sign.
    2. For Construction Services Contract,
        a. Contracts that are < $2,500,000 – Mike Wilson will sign.
        b. Contracts that are ≥ $2,500,000 – Paul Ellinger will sign.
    3. For Change Orders and Amendments,
        a. Mike Wilson will sign all.

## Submitting the Contract for Approval

1. Ensure all sections and required fields are complete as indicated with a green check mark.
2. Click **View Approval Steps** to reveal the approval workflow that the contract will be using for approvals and signature execution. If it is not correct, revise Header information as appropriate.
3. When ready to release the contract into the Approval Steps, click **Submit for Approval** in the lower right corner.

## Signature Block Application

Once the Signature Robot has completed, the eSignature needs to be set up for approvers.

1. Open the contract, change order, or amendment.
2. Click **Contract Actions** and select **Launch eSignature**.
3. Scroll down to the signature area.
4. Under **Signature Fields** on the right side of the page, drag and drop **Signature** below "OWNER."
5. Adjust the size of the **Signature** field as needed.
6. Under **Signer Info Fields** on the right side of the page, drag and drop **Date** above "Date."
7. Adjust the size of the **Date** field as needed.
8. Repeat steps 3 to 7 for any additional signature areas.
9. Click **Send** on the bottom right-hand corner of the page.