

## Revising a Service Contract

### Overview

After a Service Contract is entered or generated, modifications can be made to the document. For example, you can increase the quantity of an item, revise the cost of an item, or add new detail lines to the procurement document. You can also make revisions to any active (not gray) field on the order header. Once an order is revised, NIS creates a record of the revisions and tracks these revisions.

Order revisions are based on the number of instances an order is modified, not the number of fields modified. The revisions will be sequential starting with 1.

Line revisions are based on the number of instances a detail line has been modified.

Revisions may happen due to Annual or Monthly Maintenance Fees or Consumer Price Index percentage Increases or decreases as agreed upon in the RFP; thus, allowing the agency to add maintenance lines to a contract and/or contract renewals.

An example of the language may include but not be limited too:

*Contract to supply and deliver "specify software" for use in the maintenance of inventory, shipping, receiving and manufacturing functions to "Agency Name" for the period from July 11, 2006 through July 10, 2009, with the option to renew for five (5) additional one (1) year periods as mutually agreed upon by all parties.*

This work instruction shows how to [Revise a Service Contract](#).

### NIS Policies

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Administrative Services website:

<http://www.das.state.ne.us/>.

### Navigation

Dependent upon the type of document you want to revise. Choose one of the following:

- Purchasing – Agencies > Contracts – Agency > Revise Service Contract (O4)
- ✎ Once a document is at an approved status, it can only be revised by accessing it through the Revise Menu selection(s). This includes cancelling a line - if the line has been approved, it can only be canceled via the Revise menu.

- ✎ "Approved" documents will have a Next Status Code greater than or equal to 215.

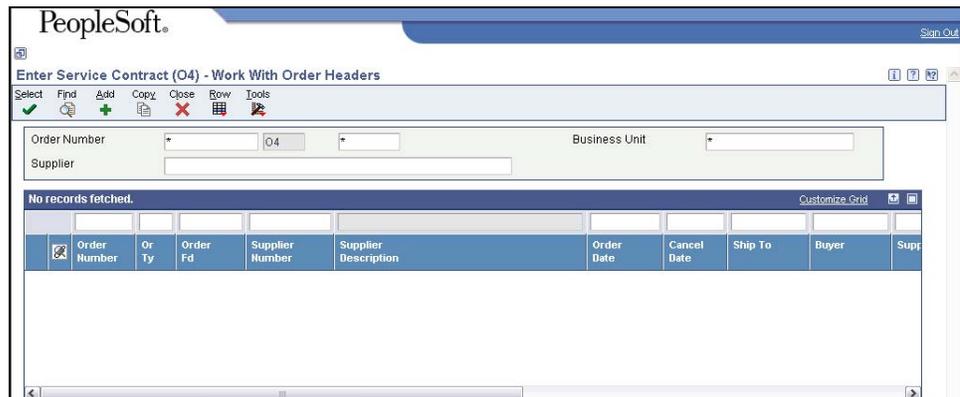
**Status can be viewed on any Order Detail Line. Changed can be made when the Next Status is equal to or greater than 213 and less than 999.**

Line Number	Ln Ty	Matrix Line Number	Dev Request	Report Code 4	Tag Number	Invoice To	Ship To Number	Buyer Number	Last Status	Next Status
1.000	J					559783	559783	576675	215	215
2.000	J					559783	559783	576675	215	215
3.000	J					559783	559783	576675	215	215

## Steps

### Revise a Procurement Document

Start this instruction from the Work with Order Header window.



1. Enter the **order number** to revise into the Order Number field.
2. Click **Find**.



3. Choose the Order Number desired.
4. Click **Select**. The Order Header window appears.

**Revise Service Contract (O4) - Order Header**

Order Number: 20222 | Business Unit: 9000

Supplier: 4211827 | JCG TECHNOLOGIES INC

Ship To: 559783 | FACILITY, MULTIPLE ADDRESSES

Buyer: 576675 | RUTH GRAY

Send Invoice To: 559783 | FACILITY, MULTIPLE ADDRESSES

Order Date: 02/16/2007

Requested: 02/16/2007

Promised Delivery: 02/16/2007

Cancel Date: 08/31/2008

Hold Code: BLANK - HOLD CODES 42/HC

Approval Code: 121889

Retainage %: [ ]

Ordered By: AVARGA2

Person/Corp. ID: C

Order Taken By: [ ]

Payment Terms: [ ]

AIA Document: Y

5. Modify Order Header information as required.
6. Click Form, Header to Detail, Populate
  - Changes to the Order Header do not automatically update on the Detail Lines. Step six must be followed to ensure data is updated.**
  - Information from the Order Header will NOT populate to Detail lines that are cancelled or closed (Status = 999).**
7. Click **OK**. The Order Detail window appears.

**Revise Service Contract (O4) - Order Detail**

Order Number: 20222 | Business Unit: 9000

Supplier: 4211827 | JCG TECHNOLOGIES INC

Ship To: 559783 | FACILITY, MULTIPLE ADDRESSES

Order Revision: 1

Order Date: 02/16/2007

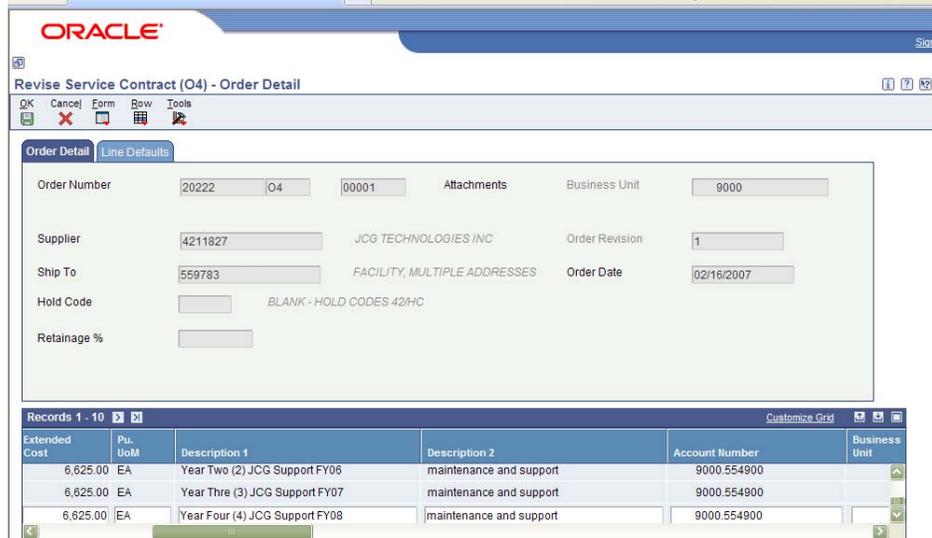
Hold Code: BLANK - HOLD CODES 42/HC

Retainage %: [ ]

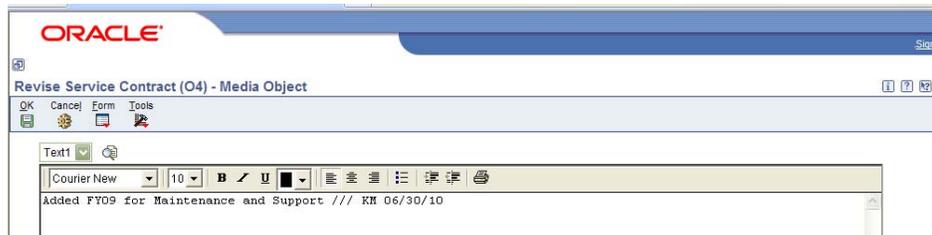
Extended Cost	Pu. UoM	Description 1	Description 2	Account Number	Business Unit
6,625.00	EA	Year Two (2) JCG Support FY06	maintenance and support	9000.554900	
6,625.00	EA	Year Thre (3) JCG Support FY07	maintenance and support	9000.554900	
6,625.00	EA	Year Four (4) JCG Support FY08	maintenance and support	9000.554900	

8. Modify or add detail line(s) as required. Any change(s) will update the revision number on the purchasing document.
  - The contract below shows examples of a service contract for maintenance and support. The RFP was written to include a 4 year contract with 3 years extension when mutually agreed upon by both parties.
  - When FY09 needs to be added, simply revise the contract by adding an additional line to include FY09.

- ✎ Do not add FY10 and FY11 until Agency knows that the vendor is complying with the specifications in the Original RFP upon Contract Renewal
- ✎ Additions to the Service Contract for IT Maintenances and Support do not need to go back through the Office of the CIO as long as the additions were part of the original RFP.
- ✎ If contract extensions were not part of the original RFP, Agencies must follow policy and procedure on how to amend a Service Contract. Procedures for the Procurement of Contractual Services can be found at: <http://www.das.state.ne.us/materiel/purchasing/rfpmanual/rfpmanual.htm>



- ✎ To cancel a line on the Service Contract, choose the line you wish to cancel and click **Row, Cancel Line**. To cancel an entire Purchase Order, all lines on the Purchase Order must be cancelled in this manner.
  - ✎ To cancel all lines on a Service Contract, click **Form, Cancel Order**
9. Click **OK**. Enter Text Attachment appears – this is tied to the Revision that you have created.
  10. Enter details on the changes that you made to the document.
- ✎ Also include the date of the change and the initials of the person who made the change. (Ex. 9/18/06 – LM)



11. Click **OK**. You will return to the Work with Order Headers window.
12. Click **Close**.