Reimbursable Contract Billing Limit Amendment

Purpose: Use this document to amend or adjust a reimbursable contract billing limit in ctcLink.

Audience: Finance/Grant Fiscal Staff.

You must have at least one of these local college managed security roles:

- ZC Contracts Processing
- ZZ Contract Maintenance
- ZZ Contract Processing

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

When changes occur to your Grant Budget, make sure to update the total Grant Contract Limit. Navigate to the Grants > Award Profile > Funding Inquiry to verify individual Grants. The Contract Limit provides the total billing limit, thus this Award 3510 would only be able to bill a total amount of \$17,400.

The following example, a funding increase was approved and Grant Budget was increased by \$5,000. The next step would be to Amend the total contract billing amount by increasing the Total Billing Limit by \$5,000. Thus bringing the **Total Billing** Limit \$22,400 to match **Total Posted Budget Amount \$22,400**.

C General				Award Pr	rofile
Award Eunding	Resources Certific	ations Terms M	lilestones Key Words Fund	ding Inquiry	
	Award ID	000000000000000035	10		
Re	ference Award Number	105-PLB-23			
Total Pr	rojected Award Amount	\$17,400.00			
Total R	eported Award Amount	\$17,400.00	Grant Budget Tota	1 =	
Total	Posted Budget Amount	\$22,400.00	Grant Contract Lin	nit	
	Total Limit Amount	\$17,400.00			
	Begin Date	07/01/2022	ſ	Recalculate the Amounte	
	End Date	07/31/2023	l l	Recalculate the Amounts	
Contract Lines				Find View All First 🕚 1 of 1 🕢 La	ist
	Contract Line	1	Total Posted Budget Am	ount \$22,400.00	
	Billing Limit Amount	\$17,400.00			
Project Detail			Personalize Find	🗇 🔣 🛛 First 🕢 1-3 of 3 🛞 Las	t
Project	Activity		Funded Amount	Posted Budget Amount	
1 0000007670	ADMIN		\$5,000.00	\$5,000.00	
2 0000007670	PRGDV		\$10,520.00	\$10,520.00	
3 0000007670	PRTNR		\$6,880.00	\$6,880.00	
Re Award Funding Re	turn to Search 💽 Noti	fy 📿 Refresh erms Milestones Key	v Words Funding Inquiry	Add Display	

Amending a Reimbursable Contract Billing Limit

Navigation: Customer Contract > Create and Amend > Define Contract General Info

- 1. The **General Information** search page displays.
- 2. Select the **Find an Existing Value** tab. Search for specific Contract ID by entering valid values such as:
 - Enter or look up the **Business Unit**.
 - Enter or look up the **Contract** to be amended.
- 3. Select the **Search** button.
- 4. The **General Information** page displays.
- 5. Select the **Amend Contract** button.
- 6. The **Amendments** tab displays.
- 7. Enter or select the **Amendment Type.**
- 8. Enter or select the **Reason**.
- 9. Select the **Save** button.
- 10. Select the **Detail** link.

General Information	٦			General In	formation	
Ge <u>n</u> eral Line	es Amendments					
Contr Pending	ract Number 000000000000000035 Amendment 0000000001	10 Sol	Id To Customer State B Contract Status ACTIVE	oard for Comm & Te	ch Colleges	
Amendments	tistics <u>Billing Amended Amounts</u>	Revenue Amended Amounts	<u>M</u> isc. Ⅱ	14	1-2 of 2 🗸	▶ ▶ View All
Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes
000000000			08/23/2022	Complete	Detail	Notes
000000001	No Cost Extention	No Cost Extention	06/01/2023	Pending	Detail	Notes
Billing Plans Return to Project Gener Save Return General Lines Ar	Revenue Plans Milest ral to Search Notify mendments	ones Renewals	Amount Allocation	Supplemental D	lata Go	To More V

- 11. The **Amendment Details** page displays.
- 12. Increase or decrease the **Total Billing Adjustment** amount as needed.
- 13. Select the **Save** button.
- 14. Select the Amendment Amount Allocation link.

Amendment Details					
Contract 0(Sold To Customer Fil	000000000000003510 100107		Amendment Numbe	r 000000001	
Amendment Type N Amendment Reason N	o Cost Extention		*Process Dat *Amendment Statu	te 06/01/2023	
Total Billing Adjustment 5, Fixed Billing Adjustment 0. Fixed Billing Allocation In Additional Amendment Details	000.00 complete	To Fix Fi	tal Revenue Adjustmer ed Revenue Adjustmer ixed Revenue Allocatio	nt 5,000.00 nt 0.00 in Incomplete	
Reference ID			User Ref #1 User Ref #2		
Amendment Components General Statistics III					4
Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1					
Amendment Amount Allocation Return to General Information		Internal Notes			
Save Return to Search N	otify				

15. The **Amendment Amount Allocation** page displays.

- 16. Enter the **New Billing Limit** to match the **Total Billing After Adjustment** amount.
- 17. Select Save.
- 18. Select the **Recalculate** button.
- 19. Lastly, you will want to perform a Limit Check by selecting the Limit Check button.

Amendment Billing Allocation Amendment gevenue Allocation Contract 000000000000000000000000000000000000
Contract: 000000000000000000000000000000000000
Business Unit VAA69 Comma Stech Colleges Amendment 20000001 Currency USD State Board for Comm & Tech Colleges Amendment Type No Cost Extention Currency USD to Cost Extention Total Billing Adjustment 5.000.00 Unallocated Billing 5.000.00 Total Billing Adjustment 22.400.00 Unallocated Billing 5.000.00 Total Billing Adjustment 0.000 Unallocated Fixed Billing 0.00 Discount / Surcharge 0.000 Inclusive Prepaids Adjustment 0.00 Net Adjustment 0.000 Allocation Incomplete Image Adjustment 0.00 Net Adjustment 0.000 Unallocated Fixed Billing 0.00 Net Adjustment 0.000 Allocation Incomplete Image Adjustment 0.00 Image Adjustment 0.000 Unallocated Fixed Billing 0.00 Net Adjustment 0.000 Allocation Incomplete Image Adjustment 0.00 Image Adjustment 0.000 Image Image Adjustment 0.00 Image Adjustment 0.000 Image Image Adjustment 0.00 Image Adjustment 0.000 Image Image Image Adjustment 0.00 Image Image
Sold To Fixed Billing Adjustment Sold To Amendment Type No Cost Extention Contract Billing ® Image: Sold To Image: Sold To Sold To Sold To Total Billing Adjustment 5.000.00 Unatiocated Billing Sold To Sold To Total Billing Adjustment 5.000.00 Unatiocated Billing Sold To Sold To Fixed Billing @ Image: Sold To Image: Sold To Sold To Sold To Fixed Billing Adjustment D.00 Unatiocated Fixed Billing 0.00 Image: Sold To Discount / Surcharge 0.00 Allocation Incomplete Image: Sold To Image: Sold To Image: Sold To mounts Detail Une Number Product Current Billing New Billing Limit Limit Check 19 Limit Check 1 ORANT_SVC 17,400.0 22,400.00 10 19 Limit Check
Current y Ugy Announts Product Current Billing Price Line Number Product Current Billing Price Line Number Product 17,400,00 22,400,00 10 10 10 10 10 10 10 10 10 10 10 10 1
Contract Billing ⑦ Total Billing Adjustment 5,000.00 Total Billing Adjustment 2,400.00 "Fixed Billing ⑦ Unatiocated Billing 0.00 Discount / Surcharge 0.00 Discount / Surcharge 0.00 Net Adjustment 0.00 Autocation Incomplete Image: Current Billing Price Linet Number Product Current Billing Image: Number Product Current Billing 1 GRANT_SVC
Total Billing Adjustment 5,000.00 Total Billing Adjustment 22,400.00 Stard Billing ® Inaliocated Billing Fixed Billing Adjustment 0.00 Discount/Surcharge 0.00 Net Adjustment 0.00 Anounts Detail Reviewe Billing Price Line Vicing 1 GRANT_SVC
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Fixed Billing @ Fixed Billing Adjustment 0.00 Discount / Surcharge 0.00 Net Adjustment 0.00 Amounts Detail Retrieve Billing Price Line Number Product Current Billing 1 GRANT_SVC
Fixed Billing Adjustment 0.00 Unallocated Fixed Billing 0.00
Fixed Billing Adjustment D.00 Unatiocated Fixed Billing 0.00
Discount / Surcharge 0.00 inclusive Prepaids Adjustment 0.00 Net Adjustment 0.00 Allocation incomplete
Net Adjustment 0.00 Allocation Incomplete Implication Incomplete Implication Implication Implication Implication Implication Implication Implication Implication Implication Implication Implication Implication Implication Implication Implication Product Current Billing Implication Implication Implication Implication Implic
Intract Line Pricing ⑦ ITT Q Amounts Detai Retrieve Billing Price Line Number Product Current Billing Limit Adjustment Billing Limit Limit Check 1 GRANT_SVC 17,400.0 22,400.00 16 19 Limit Check
Amounts Id International Internationa International International Internatione International Internati
Image: Amounts Detail Amounts Detail Retrieve Billing Price Line Number Product Current Billing Linnt New Billing Linnt Adjustment Billing Linnt Linnt Check 1 GRANT_SVC 17,400.00 22,400.00 16 19 Linnt Check
Amounts Detail Retrieve Billing Price Line Number Product Current Billing Limit New Billing Limit Adjustment Billing Limit Limit Check 1 GRANT_SVC 17,400.00 22,400.00 19 Limit Check
Retrieve Billing Price Line Number Product Current Billing Limit New Billing Limit Adjustment Billing Limit Limit Check 1 GRANT_SVC 17,400.00 22,400.00 16 19 Limit Check
1 GRANT_SVC 17,400.00 22,400.00 16 19 Limit Check
<u> </u>
Select All Clear All Recalculate
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Billing Amount 0.00 Recurring Billing 0.00
Discounts/Surcharges 0.00 Billing Limit 0.00 Total Billing 0.00
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- 20. A message indicating that the Limit Check is complete displays.
- 21. Select the **OK** button.

Notice that after you recalculate that the Allocation status will change from Incomplete to Complete.

- 22. The Amendment Billing Allocation tab displays.
- 23. Select the **Save** button.
- 24. Select the Return to the Amendment Details link.
- 25. The Amendment Details page displays.
- 26. Change the Amendment Status from Pending to Ready.
- 27. Select the **Process Amendment** button.
- 28. Select the **Save** button.

Amendment Details					
Contract 000	0000000000003510		Amendment Number	000000001	
Sold To Customer FIN	00107				
Amendment Type No	Cost Extention		Process Date	06/01/2023	
Amendment Reason No	Cost Extention		*Amendment Status	Ready 🗸	Process Amendment
Total Billing Adjustment 5,0	00.00	Total	Revenue Adjustment	5,000.00	
Fixed Billing Adjustment 0.0	0	Fixed	Revenue Adjustment	0.00	
Fixed Billing Allocation Co	mplete	Fixe	d Revenue Allocation	Complete	
Additional Amendment Details					
Reference ID			User Ref #1		
			User Ref #2		
Amendment Components					
T Q			\	N	I ≪ 1-2 of 2 ♥ ► ► I View All
General Statistics III				X X	
Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1 Amount Allocation	Line 1	Billing Limit	Update	17400	22400
2 Amount Allocation	Line 1	Revenue Limit	Update	17400	22400
Return to General Information	1	nternal Notes			
Save Return to Search No	tify				

- 29. The Amendment Status will then be Complete.
- 30. Process complete.

Optional to select the **Return to General Information** link and the Contract Lines section, select the **Billing Amount Details** tab to review the **Billing Limit** amount.

Related Projects						General Informa	ition		
General	Amendme	nts							
Contract	Number 00000 Number 00000	000000000003510 000001	B	Sold To Customer Contract Status	State Board for Comr	n & Tech Colleges			
Amend Cor	ntract]							
Contract Lines ⑦	Billing Am	ount Details	enue Amount Details	⊪				I€ € 1-1 of 1 ¥	View All
Actions	Line	Product	Description	n	Price Type	Quantity	UOM	Billing Limit	Unit Billing
▼ Actions	1	GRANT_SVC	Reimbursa	ble Grant Services	Rate	1.0000		22,400.00	22,400.00
Billing Plans	Revenue Plans	s Milestor	nes Renev	vals		Supplemental Data	Go To	More	~
Save Return to S General Lines Ame	Search Not endments	ify							Add Update/Display

OR Navigate back to the Grants > Award Profile > Funding Inquiry tab to review Total Posted Budget Amount = Total Limit Amount.

ard Eunding	Resources Certifi	cations Terms	Milestones Key V	/ords Fund	ng Inquiry	
	Award ID	000000000000000000000000000000000000000	03510			
Refe	erence Award Number	105-PLB-23				
Total Pro	jected Award Amount	\$17,400.00				
Total Re	ported Award Amount	\$17,400.00				
Total P	osted Budget Amount	\$22,400.00				
	Total Limit Amount	\$22,400.00				
	Begin Date	07/01/2022		r	Peopleulate the Amounts	
	End Date	07/31/2023			Recalculate the Amounts	
ntract Lines				F	nd View All First 🕚 1 of 1 🧕	Last
	Contract Line	1	Total Poste	d Budget Amo	unt \$22,400.00	
	Billing Limit Amount	\$22,400.00				
roject Detail			Pers	onalize Find	🔄 🔣 🛛 First 🕢 1-3 of 3 🕢	Last
Project	Activity		Funded Amount	F	Posted Budget Amount	
1 0000007670	ADMIN			\$5,000.00	\$5,000.00	
2 000007670	PRGDV			\$10,520.00	\$10,520.00	
3 0000007670	PRTNR			\$6,880.00	\$6,880.00	

Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

Video Tutorial Via Panopto

View the external link to <u>Reimbursable Contract Billing Limit Amendment</u>. This link will open in a new tab/window.