Fixed Contract Billing Limit Amendment

Purpose: Use this document to amend a Fixed Price Contract (FPC) or limit amendment in ctcLink.

Audience: Finance/Grant Fiscal Staff.

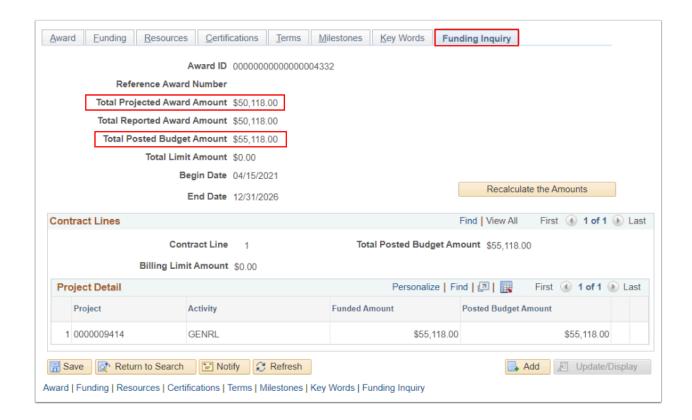
- You must have at least one of these local college managed security roles:
- ZC Contracts Processing
- ZZ Contract Maintenance
- ZZ Contract Processing

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



A If a FPC Billing was started but not completed, a Limit Amendment cannot be done. Please complete the **FPC Billing** process and once the AR Update process is run, then a limit amendment can be made.



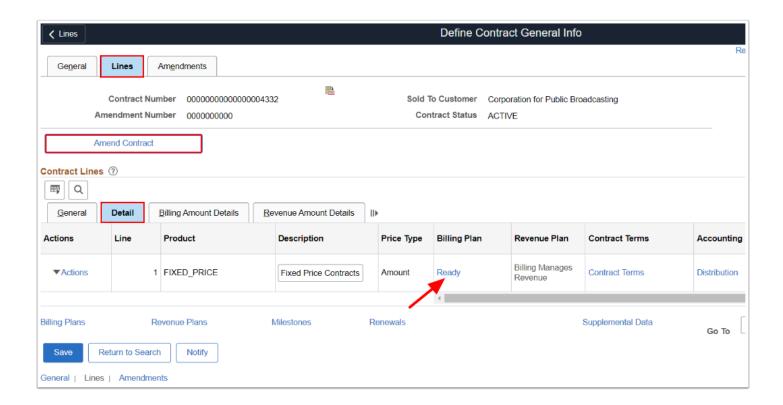


Fixed Contract Billing Limit Amendment

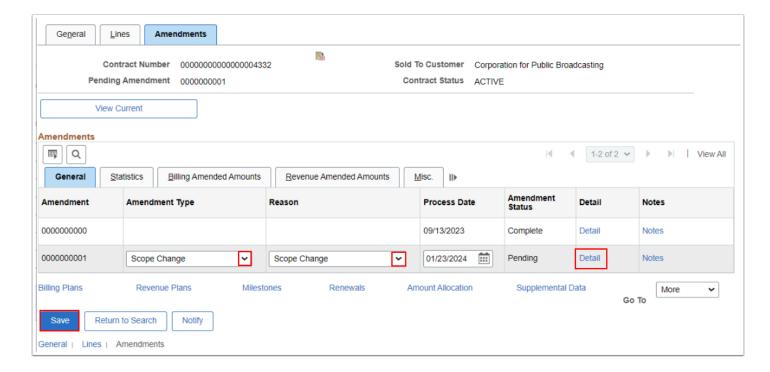
Amend the Billing Limit When the Billing Plan is 'Ready' (not invoiced yet)

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

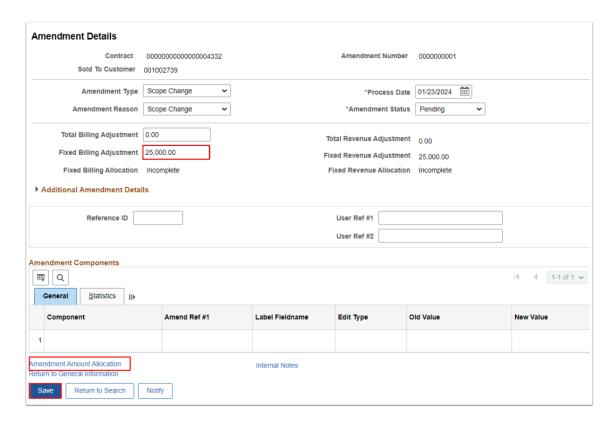
- 1. On the **General Information** search page, select the **Find an Existing Value** tab.
- 2. Enter or look up the **Business Unit.**
- 3. Enter or look up the **Contract** to be amended. Select **Search**.
- 4. The **General Information** page will display. Select the **Lines** tab.
- 5. Select the **Detail** tab to verify the **Billing Plan** status. If Billing Plan is 'Ready' then the FPC Award has not been invoiced yet.
- Select the Amend Contract button.



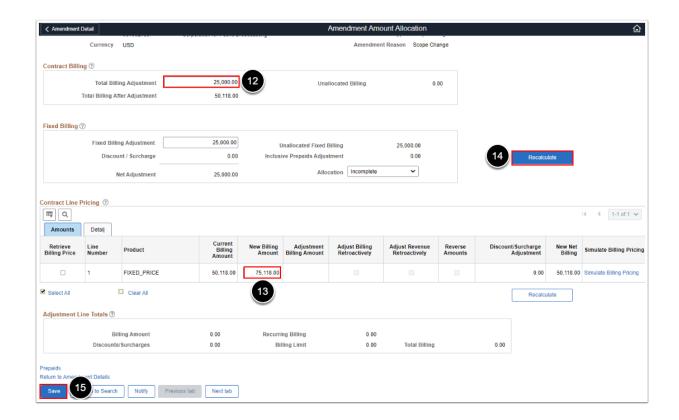
- 7. The **Amendments** tab appears. Under the **Amendments** section, select from the drop down arrows the **Amendment Type** and **Reason**.
- 8. Select the **Save** button. Notice the Amendment Status = **Pending.**
- Select the newly added amendment row **Detail** link. The **Amendment Details** page will display.



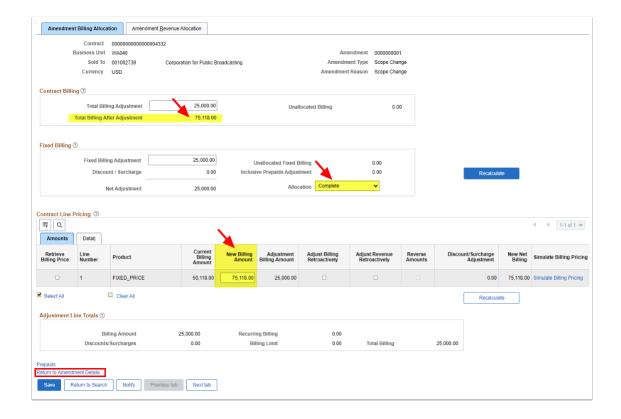
 The Amendment Details page displays. Increase or Decrease the Fixed Billing Adjustment amount as needed. 11. Select the **Save** button. Select the **Amendment Amount Allocation** hyperlink.



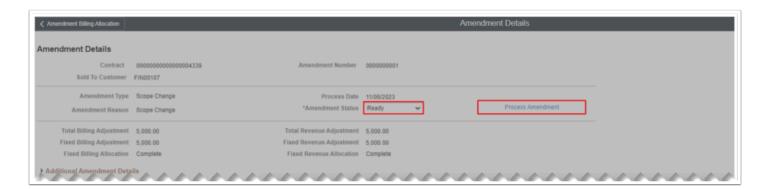
- 12. The **Amendment Billing Allocation** tab page displays. In the **Contract Billing** section, enter the **Total Billing Adjustment** amount, the amount that is going to increase/decrease, i.e. 25,000.
- 13. In **Contract Line Pricing** section, enter the updated new Total Award amount in the **New Total Amount** in the New Billing Amount field.
- 14. Select the **blue Recalculate** button. The Fixed Billing Allocation status will change from 'Incomplete' to 'Complete'. Note: the **'New Billing Amount'** should equal the '**Total Billing After Adjustment'**. (If necessary, in the Contract Line Pricing section, uncheck the **Adjust Billing Retroactively** checkbox and the **Adjust Revenue Retroactively** checkbox and select the White **Recalculate** box).
- 15. Select the **Save** button.
- 16. You may get a warning message that the Accounting Distribution does not match. Select **OK** and continue onto the next step to correct the Distribution amounts.



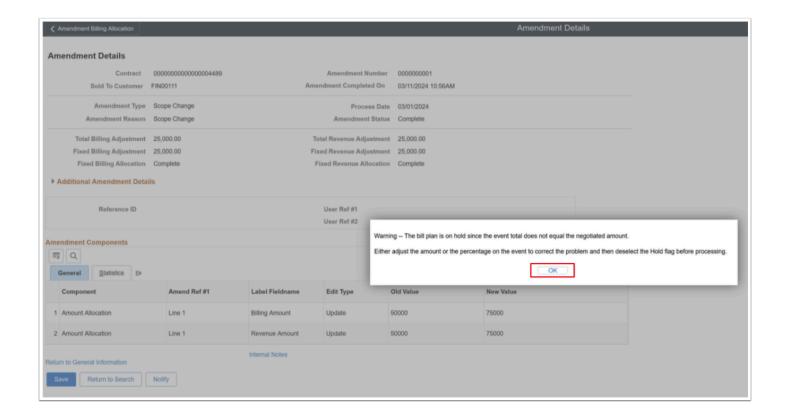
- NOTE: Notice that after you recalculate that the Fixed Billing **Allocation** status will change from 'Incomplete' to 'Complete' and the **Total Billing Adjustment** will be updated.
- 17. Select the **Return to Amendment Details** link.



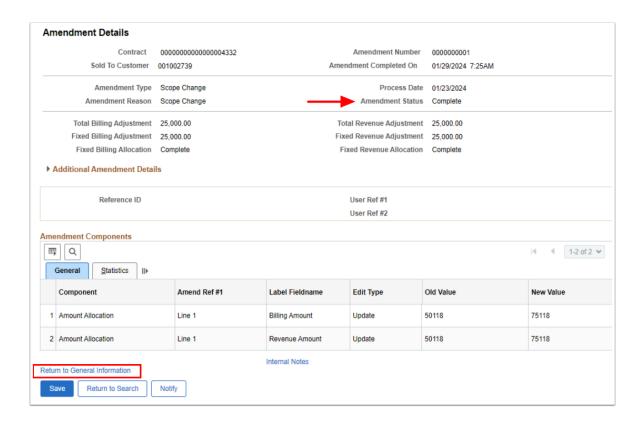
- 18. On the **Amendment Details** page, change the **Amendment Status** from 'Pending' to 'Ready'. The **Process Amendment** button will appear.
- 19. Select the **Process Amendment** button.
- 20. The Amendment Status will change from Ready to Complete.



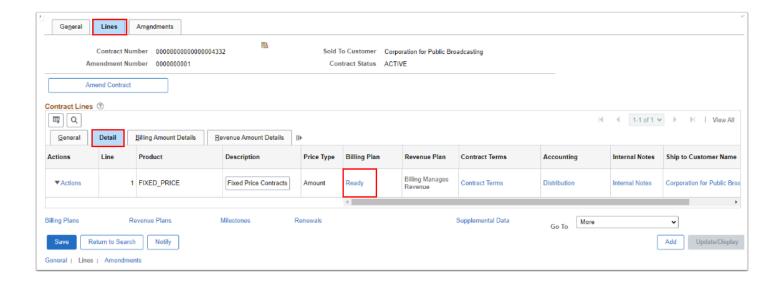
- 21. A warning box appears, reminding you to go back and update the Billing Events.
- 22. Select the **OK** button.



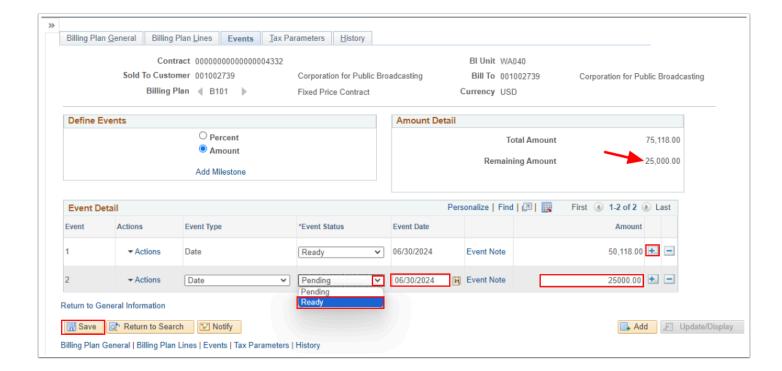
- 23. The **Amendment Status** will then be **Complete**. Select the **Save** button.
- 24. Select the Return to General Information link.



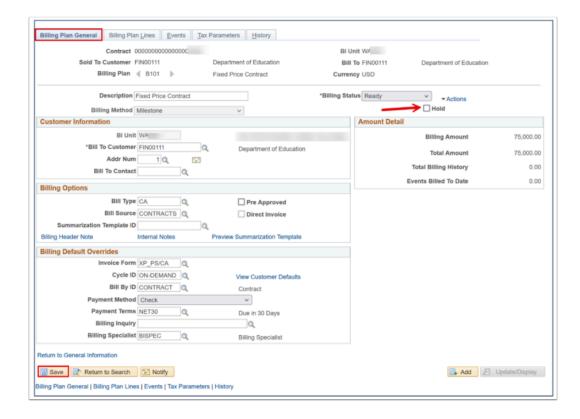
- 25. On the **General Information** page, select the **Lines** tab.
- 26. On the **Lines** tab, select the **Detail** tab.
- 27. Select the Billing Plan Ready link. The Define Billing Plan page will display.



- 28. On the **Events** tab in the Amount Detail section, note the Remaining Amount.
- 29. Select the **plus icon [+]** to add a new event. Enter the number of rows to add and select **OK.**
- 30. Enter a Select a new **Event Date** and enter the increase/decrease amount (**Remaining Amount**) to a new event.
- 31. Change the **Event Status** from 'Pending' to 'Ready'.
- 32. Select the **Save** button.



- 33. Select the **Billing Plan General** tab.
- 34. Deselect the **Hold** checkbox.
- 35. Select the **Save** button.



36. Process complete.

Video Tutorial

The video below demonstrates the process actions described in the steps listed above. This video includes audio and closed captioning. Select the play button to start the video.



VIDEO COMING SOON

Video Tutorial via Panopto

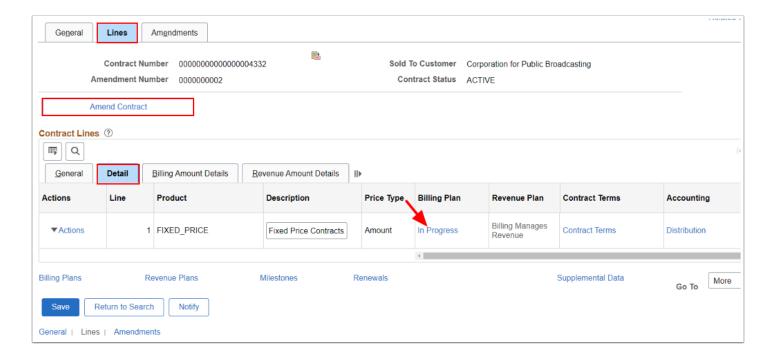
View the link to Amend FPC Billing Limit When the Billing Plan is 'Ready' (not invoiced). This link will open in a new tab/window.

* UPDATE IN PROCESS below this line * Thank you for your patience

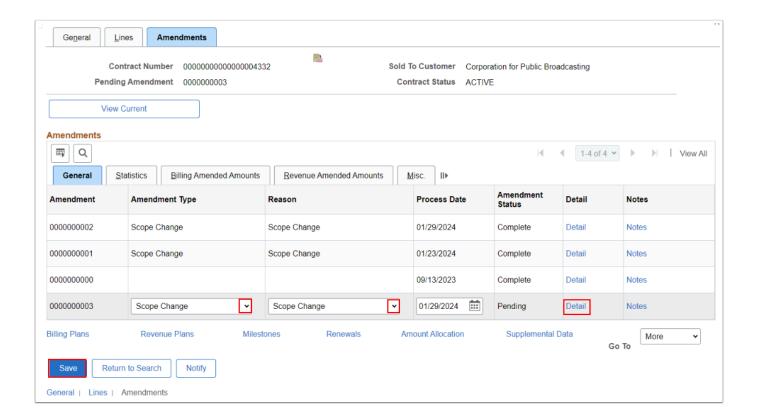
Amend the Billing Limit When the Billing Plan is 'In Progress' (already invoiced)

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

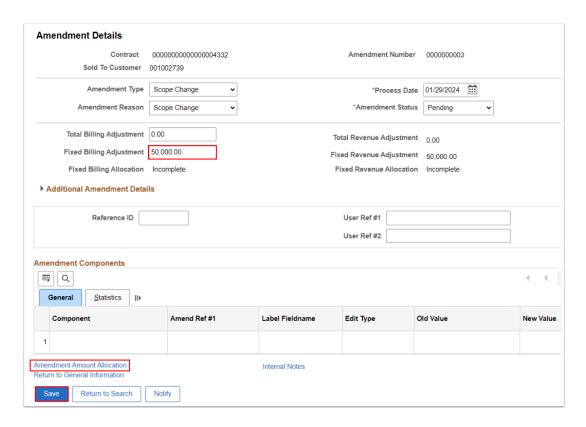
- 1. On the **General Information** search page, select the **Find an Existing Value** tab.
- 2. Enter or look up the **Business Unit.**
- 3. Enter or look up the **Contract** to be amended. Select **Search**.
- 4. The **General Information** page will display. Select the **Lines** tab.
- 5. Select the **Detail** tab to verify the **Billing Plan** status. If Billing Plan = 'In Progress' that means the FPC Award has been invoiced already.
- 6. Select the **Amend Contract** button.



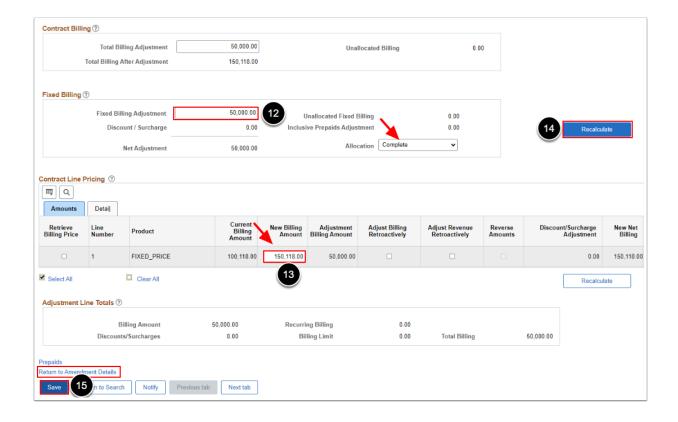
- 7. The **Amendments** tab appears. Under the **Amendments** section, select from the drop down arrows the **Amendment Type** and **Reason**.
- 8. Select the **Save** button. Notice the Amendment Status = **Pending.**
- 9. Select the newly added amendment row **Detail** link. The **Amendment Details** page will display.



- 10. The **Amendment Details** page displays. Increase or Decrease the **Fixed Billing Adjustment** amount as needed.
- 11. Select the **Save** button. Select the **Amendment Amount Allocation** hyperlink.

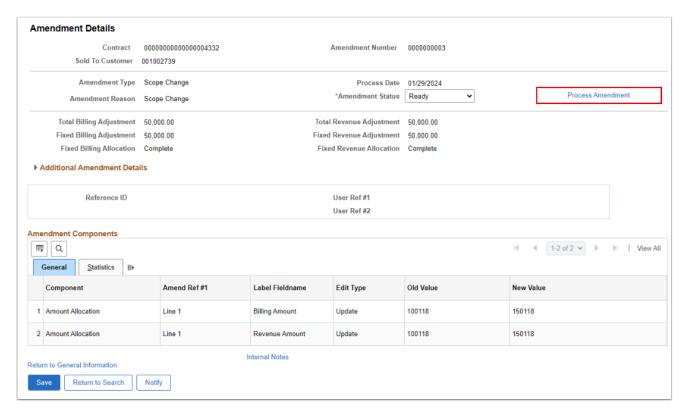


- 12. The **Amendment Billing Allocation** tab page displays. In the **Contract Billing** section, enter the **Total Billing Adjustment** amount, the amount that is going to increase/decrease, i.e. 50,000.
- 13. In **Contract Line Pricing** section, enter the updated new Total Award amount in the **New Total Amount** in the New Billing Amount field.
- 14. Select the **blue Recalculate** button. The Fixed Billing Allocation status will change from 'Incomplete' to 'Complete'. Note: the **'New Billing Amount'** should equal the '**Total Billing After Adjustment'**. (If necessary, in the Contract Line Pricing section, uncheck the **Adjust Billing Retroactively** checkbox and the **Adjust Revenue Retroactively** checkbox and select the White **Recalculate** box).
- 15. Select the **Save** button. You may get a warning message that the Accounting Distribution does not match. Select **OK** and continue onto the next step to correct the Distribution amounts.
 - NOTE: Notice that after you recalculate that the Fixed Billing Allocation status will change from 'Incomplete' to 'Complete' and the Total Billing Adjustment will be updated.
- Select the Return to Amendment Details link.



- 17. On the **Amendment Details** page, change the **Amendment Status** from 'Pending' to '**Ready'**. The **Process Amendment** button will appear.
- 18. Select the **Process Amendment** button.
- 19. The Amendment Status will change from Ready to Complete.

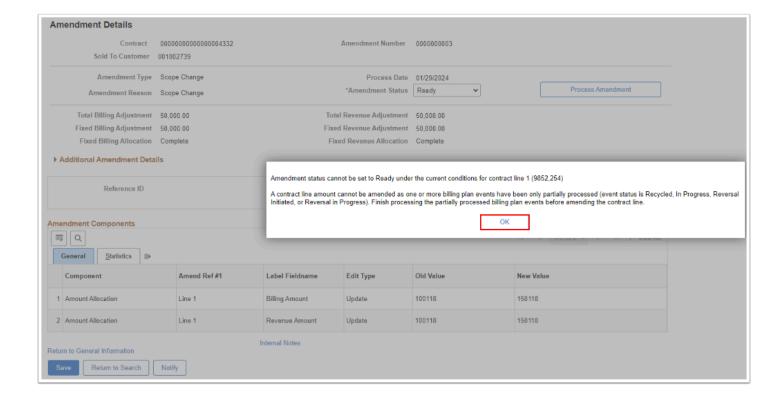






A If you receive a warning message about the bill plan being partially processed. Select the **OK** button and go back to the **Bill Plan Events**. If you need help at this point, please submit a service desk ticket.

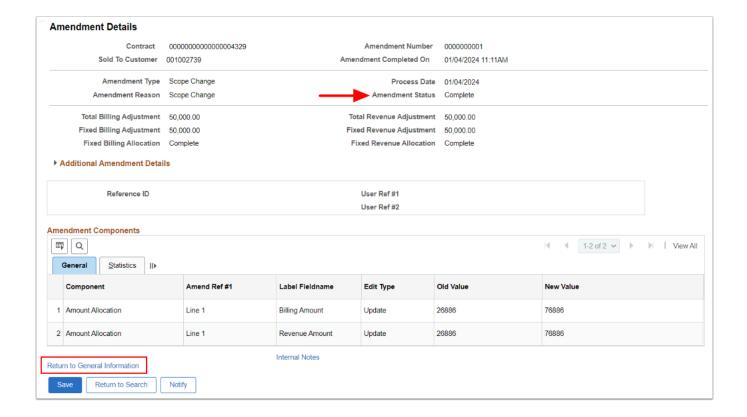
20. Select the **OK** button.



- 24. The **Amendment Status** will then be **Complete**. Select the **Save** button.
- 25. Select the **Return to General Information** link.

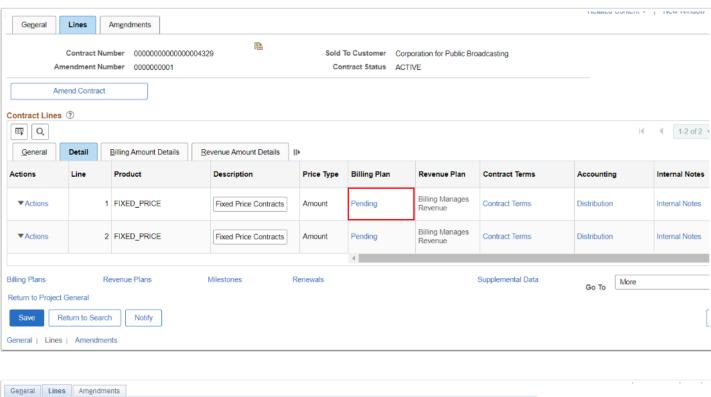


*** QRG WORK IN PROGRESS below this line *** Appreciate your patience



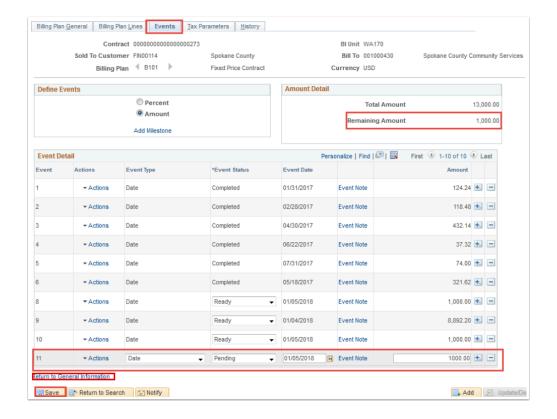
- 28. On the **General Information** page, select the **Lines** tab.
- 29. On the **Lines** tab, select the **Detail** tab.
- 30. Select the **Action Required** link in the **Billing Plan** column. The **Define Billing Plan** page will display.

*** Steps to be added - in theory, 1 billing needs to be have completed prior amendment.

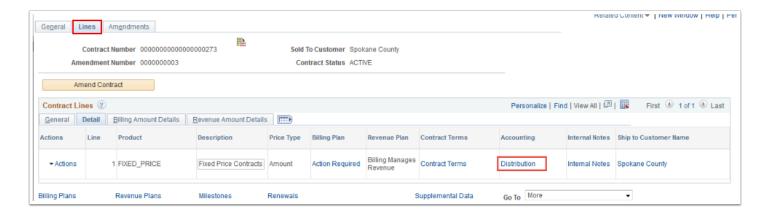




- 31. On the **Events** tab in the Amount Detail section, note the Remaining Amount.
- 32. Select a new **Event Date** and enter the increase/decrease amount (**Remaining Amount**) to a new event.
- 33. Change the **Event Status** from 'Pending' to 'Ready'.
- 34. Select Save.
- 35. Return to General Information.



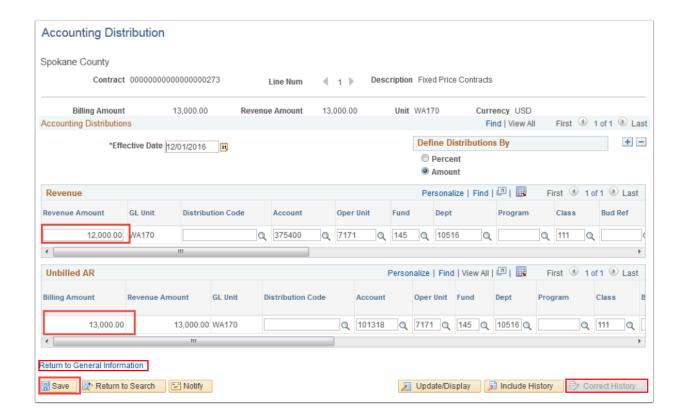
36. On the **Lines** tab, select the **Distribution** hyperlink.



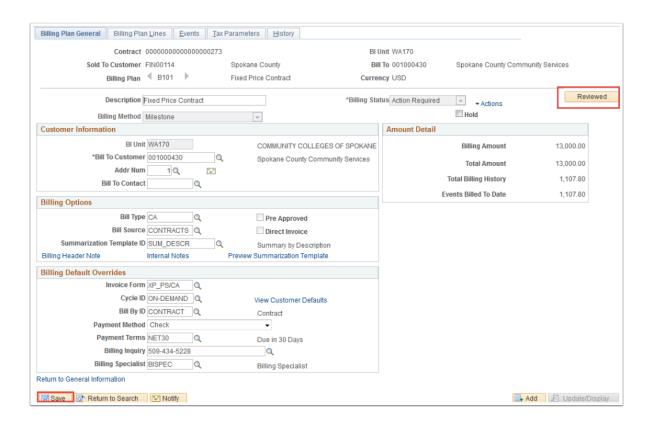
- 37. Select the **Correct History** button then adjust the **Revenue Amount** to the newly total amended amount.
- 38. Select Save.
- 39. Return to the **General Information**.



Total Revenue Amount should equal Total Billing Amount.



- 40. Return to the **Billing Plan General** tab.
- 41. Select the **Reviewed** button (you should notice that the billing status change to "In Progress".
- 42. Select Save.



43. Process complete.

Video Tutorial

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



VIDEO COMING SOON!

Video Tutorial via Panopto

View the link to Fixed Contract Billing Limit Amendment. This link will open in a new tab/ window.