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.

⚠ 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.

💡 Navigate to the Award Profile > Funding Inquiry tab to check if the **Total Budget Amoun**t (Grant-side) matches the **Total Award Amount** (Contract-side).

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.
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.

Amendment Details

Contract	00000000000000004332	Amendment Number	0000000001
Sold To Customer	001002739		

Amendment Type	Scope Change	*Process Date	01/23/2024
Amendment Reason	Scope Change	*Amendment Status	Pending

Total Billing Adjustment	0.00	Total Revenue Adjustment	0.00
Fixed Billing Adjustment	25,000.00	Fixed Revenue Adjustment	25,000.00
Fixed Billing Allocation	Incomplete	Fixed Revenue Allocation	Incomplete

▶ Additional Amendment Details

Reference ID		User Ref #1	
		User Ref #2	

Amendment Components

General Statistics

	Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1						

Amendment Amount Allocation   Internal Notes
Return to General Information

Save   Return to Search   Notify

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.

16. 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**.

	Amendment Type	Scope Change		*Process Date	01/29/2024
	Amendment Reason	Scope Change		*Amendment Status	Pending
					Cancelled
					Pending
					Ready
	Total Billing Adjustment	50,000.00		Total Revenue Adjustment	
	Fixed Billing Adjustment	50,000.00		Fixed Revenue Adjustment	50,000.00
	Fixed Billing Allocation	Complete		Fixed Revenue Allocation	Complete

Amendment Details

Contract	00000000000000004332	Amendment Number	0000000003	
Sold To Customer	001002739			
Amendment Type	Scope Change	Process Date	01/29/2024	
Amendment Reason	Scope Change	*Amendment Status	Ready	Process Amendment
Total Billing Adjustment	50,000.00	Total Revenue Adjustment	50,000.00	
Fixed Billing Adjustment	50,000.00	Fixed Revenue Adjustment	50,000.00	
Fixed Billing Allocation	Complete	Fixed Revenue Allocation	Complete	

▸ Additional Amendment Details

| Reference ID | User Ref #1 |
| | User Ref #2 |

Amendment Components

1-2 of 2 ▾ | View All

| General | Statistics | ‖▸ |

	Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1	Amount Allocation	Line 1	Billing Amount	Update	100118	150118
2	Amount Allocation	Line 1	Revenue Amount	Update	100118	150118

Internal Notes

Return to General Information

Save | Return to Search | Notify

> ⚠ 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.

Amendment Details

Contract	00000000000000004332
Sold To Customer	001002739

Amendment Type	Scope Change
Amendment Reason	Scope Change

Amendment Number	0000000003
Process Date	01/29/2024
*Amendment Status	Ready

Process Amendment

Total Billing Adjustment	50,000.00
Fixed Billing Adjustment	50,000.00
Fixed Billing Allocation	Complete

Total Revenue Adjustment	50,000.00
Fixed Revenue Adjustment	50,000.00
Fixed Revenue Allocation	Complete

▶ Additional Amendment Details

Reference ID

Amendment status cannot be set to Ready under the current conditions for contract line 1 (9852,254)

A contract line amount cannot be amended as one or more billing plan events have been only partially processed (event status is Recycled, In Progress, Reversal Initiated, or Reversal in Progress). Finish processing the partially processed billing plan events before amending the contract line.

OK

Amendment Components

Tabs: General | Statistics | ‖▶

	Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1	Amount Allocation	Line 1	Billing Amount	Update	100118	150118
2	Amount Allocation	Line 1	Revenue Amount	Update	100118	150118

Internal Notes

Return to General Information

Save | Return to Search | Notify

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

Amendment Details

Contract	00000000000000004329
Sold To Customer	001002739

Amendment Number	0000000001
Amendment Completed On	01/04/2024 11:11AM

Amendment Type	Scope Change
Amendment Reason	Scope Change

Process Date	01/04/2024
Amendment Status	Complete

Total Billing Adjustment	50,000.00
Fixed Billing Adjustment	50,000.00
Fixed Billing Allocation	Complete

Total Revenue Adjustment	50,000.00
Fixed Revenue Adjustment	50,000.00
Fixed Revenue Allocation	Complete

▶ Additional Amendment Details

Reference ID	User Ref #1
	User Ref #2

Amendment Components

Tabs: General | Statistics | ‖▶

1-2 of 2 | View All

	Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1	Amount Allocation	Line 1	Billing Amount	Update	26886	76886
2	Amount Allocation	Line 1	Revenue Amount	Update	26886	76886

Internal Notes

Return to General Information

Save | Return to Search | Notify

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

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