CONSULTANT CONTRACT: PSC AGREEMENT

The UPL / COORDINATOR will initiate new agreements.

In order to create a new agreement, please follow these steps:

1. Log into the AiM system, and go to the **Contract Administration** screen from the main Menu.

2. Select the **Consultant Contract** menu option.

**NOTE:** From this screen you can Search, create a New Contract, or open the Contract main screen:
3. Click on the “New” option on the Consultant Contract screen:

**REQUESTED Workflow Status**

4. Enter the following information:

   1. Description – Enter contract name and brief description. (This field contains 255 characters only.)
   2. The scope of the project should be entered into the “Extra Description” view.
**NOTE:** The Contract Number will be auto-assigned by the system.

3. Type: PSC – Enter the contract type directly in the field and click on the icon to validate the selection. Or click on the icon for a list of contract types, and select PSC.

4. Capital Project – Enter the pertinent Project # or click on the icon for a list of projects from which you can select the appropriate one by clicking on the project number in blue.

5. Contractor and Address Code – Type in the Contractor’s # or name and click on the icon to confirm the selection. You can also retrieve a comprehensive list of Contractors by clicking on the icon.

If there is a single Contractor’s Address, it will be automatically populated by the system, based on the selected Contractor. If the Contractor has multiple addresses, select the appropriate address code.
6. Request Date – This is the date the Contract is entered into AiM.
7. Start and End Dates – These are the dates/period during which the Contractor will provide services.

8. Notes Log – Two types of notes have to be entered with the information for Items # 2 and # 7 of the PSC Agreement:
a. Go to the Notes Log view

b. Click on **Add**

c. Click on the Note Type **search** icon
d. Select the option “PSC-SERVICES” (which will populate item # 2 of the agreement)

a. Type in the rendering of services information in the Notes field (which will show under item # 2 of the agreement)
b. Click on SAVE
c. Click on Add again to add the second note
e. Click on Note Type and select the “PSC-COMPENSATE” option (which will populate item # 7 of the agreement)
f. Type in the Compensation Schedule information in the Notes field (which will show under item # 7 of the agreement)

NOTES:
- You don’t need to enter anything on the following fields. They are optional and affect only your workdesk.
- The following fields are SEARCH options on existing Notes.

5. Enter User Defined Fields (UDFs) - Scroll to the section with the PSC fields:

6. Attach a Quote/Proposal under Related Documents

You may “attach” an existing document in AiM or “add” a new document from the network or your computer.
To Attach - Search the file that you want to attach:

To Add – Browse to the desired file and select it:

a. Click on Next three times to bypass the sections for Meta Data, Attributes, and Permissions. The information for these options is not required.

b. Click on Save on the Related Documents screen.

7. Enter Scope of Work into the Extra Description Field

8. Line Item(s)
Go to the Line Item section and click on “Add”. (There is also a “Remove” icon to delete contract line items for edit purposes). Contract line items link to project components and contain the award amount to be applied as a committed cost to the component. The award amount will also roll up to the overall contract award amount.

Enter:

a. Component Group and Component
b. Description – The description field can accommodate up to 255 characters. This field is automatically populated with the Component’s description. But, you may change it.
   
   i. The Consultant Contract Line Item Screen has an Extra Description, Notes Log, and Related Documents views to capture additional information.

c. Line Group - This field displays the line group code. The line group code is a reporting element for grouping contract line items.

d. Award Amount – Enter amount without a comma.
e. Tax and Tax Rebate if applicable.
f. Click on Done, or Add if another line item needs to be entered.
9. Click on **Save**.

10. Print the AU PSC Contract:

   a. Click on **Print**
b. Select the “AU PSC Contract” from the list of available reports.

The system will generate your report, normally on a new tab, depending on your web browser settings.
11. Save the agreement as a PDF file in the network folder with the related project documentation.

The steps to save the file may vary depending on your web browser. Here are two examples:
12. Attach the Agreement PDF file as a “Related Document” to the AiM Contract.

a. From the main Consultant Contract screen, go to the “Related Documents” view:
b. On the Related Documents view, click on **Edit**

c. Click on **Add**

d. Browse the agreement PDF file and click on **Next**
e. Enter the Document Type. In this case “PSC Agreement”:

f. Click on Next three times to bypass meta data and permissions options.

g. Click on Save on the Related Documents screen.

h. Click on Back (or on Edit if you want to revise anything).

13. Change the Status to “PRJ SUPPORT REVIEW” in order to send the agreement to the Contract Specialist for Review.
a. Click on *Edit*

b. Go to Status and select "**PRJ SUPPORT REVIEW**"

14. Click on *Save*

**CONTRACT STARTS ROUTING IN THE SYSTEM**