



QUICK REFERENCE GUIDE:

5.15 PSA – Adding Term Agreements NTPs

Background:

In order to enter NTPs for term agreement contracts the contract must be active.

Roles:

PSA User

Navigation:

If there is an additional Program Code for any of the new tasks, a new Project must be added to the contract. This will be common practice with term agreements. If no project needs to be added skip to the *Creating a Term Agreement NTP* section.

Adding a Project

Contract Administration > Contract

1. From the Contract Administration Summary click the **Project** Quick Link
2. Select the **Component Actions Menu** and click the **Add** Action
3. Enter the new program number in the **Project ID** field. If you are adding a Program number that will be used on a capital project ensure to populate PSA at the end of it (i.e. Z839640000PSA).
4. Toggle the **Project Item List** to *80 – PSA* and the **Unit System** to *English*
5. Enter the Project Name in the **Project Description** field
6. If applicable populate the **Federal Project Number** and/or **State Project Number** field
7. Toggle the **Project Type** to *13 – PSA*
8. Click **Save**.

9. Select the **Categories** tab and click the **New** button
10. Enter 00BB in the **Category ID** Field
11. Enter Basic Bid in the **Category Description** field and press **Save**.

Creating a Term Agreement NTP

Contract Administration Overview > Contract

12. From the Contract Administration Summary select the **Contract Progress** quick link at the top of the screen
13. Select the **Change Orders** tab, and click the **Add** button.
14. In the General tab, toggle the **Change Order Type** to *PSATERM – Term Agreement NTP*.
15. Enter the NTP number in the **Assigned Change Order Number** field (e.g. NTP 1) and enter a succinct summary of the NTP in the **Summary of Changes(s)** field.
16. Click **Save**.

Increase/Decrease Items (if you are modifying the \$\$ for a task previously added to the contract)

17. Press **Select Items** and from the modal find and select the item you will be modifying and press **Add to Change Order**
18. In the **Quantity** field enter the change of dollar value the NTP changes the item (use a negative if you are decreasing the item)
19. Press **Save**.

If you need further assistance please contact your Module Admin

Updated May 2024



QUICK REFERENCE GUIDE:

5.15 PSA – Adding Term Agreements NTPs

New Items (If you are adding new tasks)

20. Click the **Select New Item** button to open a modal window.
21. In the Select New Item window, press enter in the **Reference Item** autocomplete to see all available PSA items. Select the correct item based on the scope of the NTP.
22. Select the correct **Project** (program number).
23. Click the **Add to Change Order** button at the bottom of the modal window.
24. Enter the **Quantity** (use the total dollar amount), **Funding, Unit Price** (enter 1), **Supplemental Description** (this is required and should be task specific information i.e. Task 5 - Risk Management), and **Contractor** (optional) for the new item.

Time Adjustments

25. Click the **Select Contract Time** button to open a modal window.
26. Click **Show first 10** to display all contract times and select the **Completion Date**.
27. Click the **Add Time Adjustments to Change Order** button at the bottom of the modal window.
28. Enter the **Adjusted Completion Date** for the contract time.
29. Click **Save**.

Submitting & Approving NTP

1. Prior to submitting for approval, ensure that the NTP has been entered correctly, and that all tasks and dollar values are correct. After the NTP is approved no changes or corrections can be made.
2. On the Contract Change Order Summary, click the **Component Actions Menu** in the upper right corner in the Tasks section, **select Submit For Approval**. The system will change the Status of your Change Order to Pending Approval.
3. Review the Change Order once more to ensure the information has been entered correctly.
4. On the Contract Change Order Summary, click the **Component Actions Menu** in the upper right corner in the Tasks section, click **Approve** to open a modal window, or **Change to Draft** if you need to make a correction.
5. In the Approve modal window enter the date the NTP was physically signed as the **Signed Date**.
6. Click **Save**.

Next Steps:

To add more NTPs repeat this QRG.

To add Amendments see the QRG *5.1 PSA – Adding Amendments*

To close the contract see the QRG: *5.2 PSA – Close Contract*