



Creating Modifications

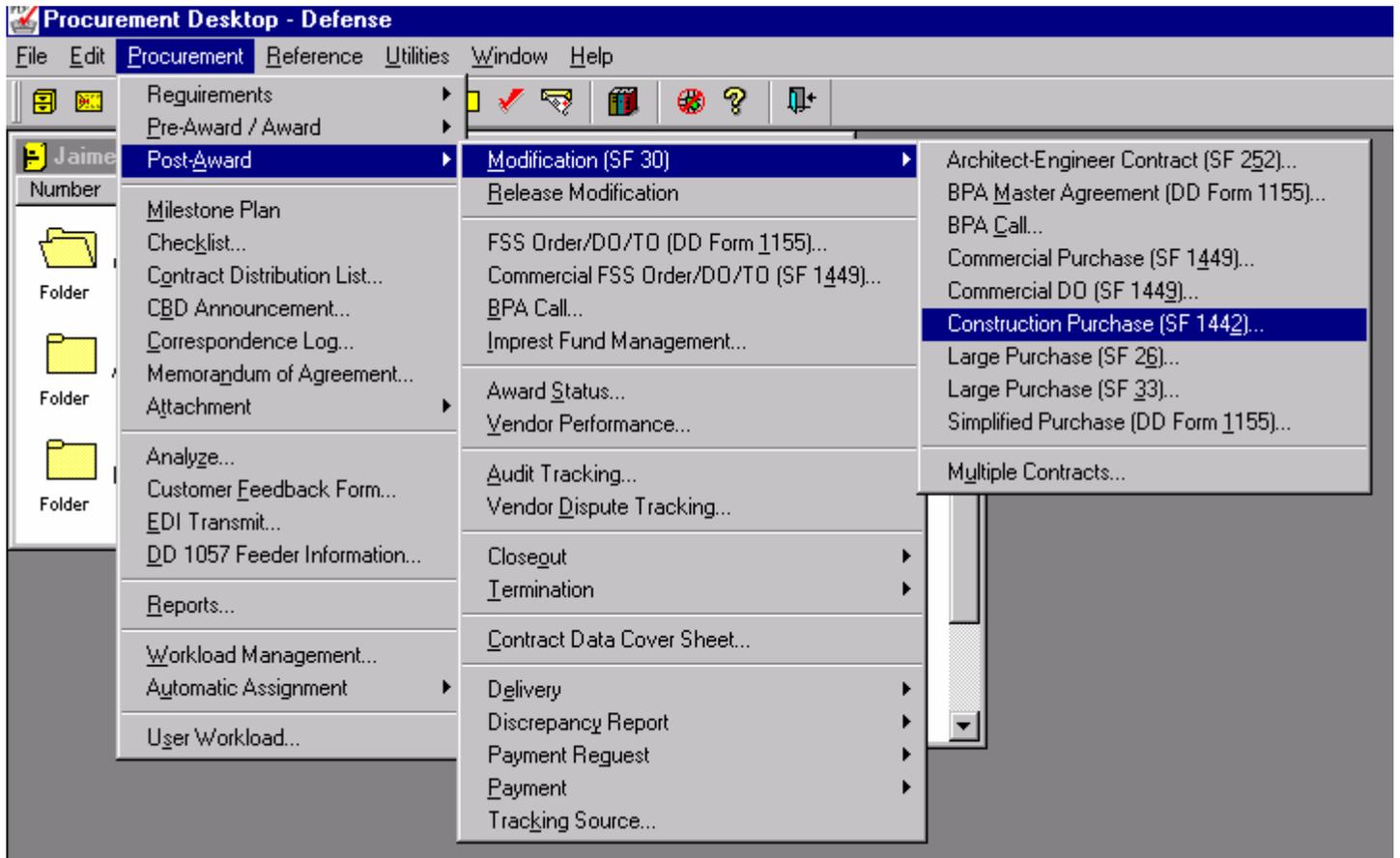
February 27, 2001

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1. CONTRACT MODIFICATIONS

To modify an existing contract, begin by highlighting the contract and select **Procurement** → **Post Award** → **Modification**. Select the basic contract type of the highlighted document, under the menu option **Modification**.



1.1 The Modification Form

When the **Create New [Contract Type] Modification** window opens the document number is automatically generated in the **Number** field. Although the **Number** field is editable, do not change the default modification number to an official modification number.

Note: When a modification is created, the letter “U” precedes the last five digits of the modification number. The “U” number, or *unofficial* modification number, is temporary until the time the modification is released. When the modification is released the user is prompted to click the **Procurement Office** radio button or the **Administering Office** radio button. This will officially change the unofficial modification number to an official modification number, which begins with an “A” or “P”.

Create New SF1442 Modification

Number: WJLW06 - 01 - C - 0001 - U 00001

Description: SF1442 Modification

Reason for Modification:

OK Cancel

Complete the **Create New [...] Modification** window. The text entered in the **Reason for Modification** window automatically populates **Block 14** on the *SF 30 11-16* tab.

Construction Award Modification - WJLW06-01-C-0001-U00001

SF30 1-10 SF30 11-16 1442 1-9 1442 10 1442 11-13 1442 14-23 1442 24-31 Clauses

DEPARTMENT OF DEFENSE AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT		1. CONTRACT ID CODE Z	PAGE OF PAGES 1
2. AMENDMENT/MODIFICATION NO. U00001	3. EFFECTIVE DATE	4. REQUISITION/PURCHASE REQ. NO. WJLW04	5. PROJECT NO. (if applicable)
6. ISSUED BY THE JUDGE ADVOCATE GENERAL'S SCHOOL, US, UNIVERSITY OF VIRGINIA ATTN: JAGS-SSL-B 600 MASSIE ROAD CHARLOTTESVILLE VA. 22903-1781	DABT61	7. ADMINISTERED BY (if other than item 6) DCMC ANKARA UNIT 9050 APO AE 09822-9050	
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code) LOGICON R&D ASSOCIATES 6053 W. CENTURY LOS ANGELES CA 90045		9A. AMENDMENT OF SOLICITATION NO. <input type="checkbox"/>	
		9B. DATED (SEE ITEM 11) <input type="checkbox"/>	
		10A. MODIFICATION OF CONTRACT/ORDER NO. WJLW06-01-C-0001 <input checked="" type="checkbox"/>	
CODE 4U915	FACILITY CODE	10B. DATED (SEE ITEM 13) 26-JAN-2001 <input checked="" type="checkbox"/>	

Delete Delete

Delete Add

Click **[OK]** to open the [...] **Modification** window.

Key components of the **SF 30** to remember when entering data in applicable fields:

- An Effective Date must be entered in Block 3.
- Check off the appropriate modification authority box in Block 13.
- Enter or update text in Block 14, as necessary.
- Go through the tabs pertaining to the original contract (all tabs which follow *SF 30 1-10* and *SF 30 11-16*) and enter changes as necessary.

Note: If an address is changed in the *SF 30 1-10* or *SF 30 11-16* tabs, the new address must be selected in the correlating address block on the basic contract tabs.

1.2 Adjusting Clauses

1.2.1 Adding or Editing Contract Clauses

To add a clause to the contract, begin by clicking on the *Clauses* tab. Then click the **[Add Clause]** button and highlight the clause to be added. Select the section to which the clause should be added from the **Section** drop-down list and click **[OK]**.

To modify a clause, highlight the clause and click the **[Edit]** button. When Microsoft Word opens, edit the text and select **File→Update** to save changes. Select **File→Exit** to close Microsoft Word and return to PD². An **Edited** stamp will display on the clause in the *Clauses* tab.

Note: Refer to *Chapter 4: Pre-Award/Award Functions* for more information **Clause selection**.

1.2.2 Adding Modification Specific Language

To add a clause to a modification select **Document Options → Modification**. Click the **[Add Text]** button to add text to the modification document or the **[Add Clause]** button to add a FAR, DFARS or Local clause to the modification document. When clauses are added through this window, the text of these items displays in the **Summary of Changes** only, not in the conformed modification document.

Note: When adding text or clauses, after selecting **Document Options→Modification**, select **Section SF 30 Block 14** from the **Section** drop-down list box.

1.3 Generating the Modification

Two modification types may be generated in PD²: the “long form” and the “short form” version. The “long form” modification contains the form page of the basic contract and the continuation sheets, which incorporate the changes made in all the contract/award tabs (which follow tabs *SF 30 I-10*, and *SF 30 II-16*). The “short form” modification is the **SF 30** form page with the Summary of Changes, detailing what changes were made exclusively in that modification.

1.3.1 Long Form Modification

Select **Document Options** → **Generate CLINs** to generate CLINs. This will update any changes made in the **Line Item Detail** window in the conformed document.

To generate the Summary of Changes select **Document Options** → **Generate Summary of Changes**. This places the Summary of Changes placeholder in the *Clauses* tab before Section B.

Select **Document Options** → **Generate Document** to generate the conformed document.

Note: To include the revision marks in the conformed document, select the **Revision Marks** checkbox in the **Generate Document** window.

When the message box displays that the document has been generated successfully, select **File**→**Save** to save the modification.

1.3.2 Short Form Modification

Select **Document Options** → **Generate Summary of Changes** to generate the Summary of Changes. This places the Summary of Changes placeholder in the *Clauses* tab before Section B.

Select **Document Options** → **Modification**. In this window, click the [**Generate Mod**] button. This button generates the **SF 30** without re-generating the entire document.

Save and close the document

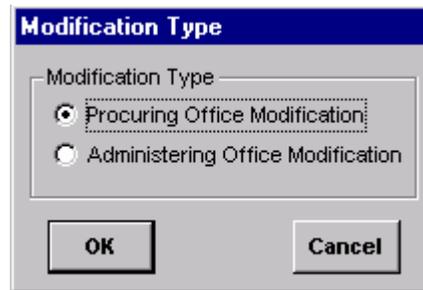
1.4 Approving and Releasing the Modification

To approve and release a modification, highlight the **SF 30** document icon, and select the **File**→**Approvals**. Choose the appropriate approval template and approve the **SF 30**.

If the modification needs to be routed for approval, route the document to the appropriate person by selecting the mail slot icon on your tool bar.

Note: Click the [Preapproval] button in the **Approval Sheet** window to run pre-approval checks, before selecting **Approved** from the **Approval Types** drop-down list box.

Once the document has the approval stamp and signature of the appropriate people, highlight the Modification and select **Procurement → Post-Award → Release Modification**. When the **Modification Type** window opens, select the **Procuring Office Modification** radio button or the **Administrative Office Modification** radio button.



Note: After selecting the modification type, the “U” in the unofficial modification number will change to an “A” or “P” based on the modification type selected, indicating that the official modification number has been assigned.

If a modification is marked for bilateral approval, the user will be prompted to select a Modification type when the document is approved. When the modification type is selected, during approval or release, the document regenerates, and the official modification number is added in the header of the continuation sheets, and the Draft watermark is removed from the form page and the headers.

Note: Only users with a sufficient warrant may release documents. See page 173 in the *Procurement Desktop-Defense User’s Guide, Version 4.1* for a list of validations that PD² runs before a document releasing a document. If all these criteria are not met, the document will not release.

2. MULTI-CONTRACT MODIFICATIONS

Multi-contract Modifications (**MCM**) are used to change contract level information that may affect multiple contracts with the same information. A contract does not have to reside on the user's desktop for the **MCM** to make the appropriate changes. At the time that the **MCM** is released, a separate modification (or, "child modification") is created as a released document for all contracts selected in the **MCM**. The **MCM** also updates any Modifications that are in progress at the time.

2.1 Getting Started with the SF 30 MCM

Begin by selecting **Procurement** → **Post-Award** → **Modifications** → **Multiple Contracts**.



When the **Create New Multiple Contract Modification** window opens, enter a document number in the **Reference Number** field. Edit the description in the **Description** field. Enter a reason for modification the **Reason for Modification** field.

Click [OK].

The **SF 30** Modification pages open. Tab through the *SF 30 1-10* and *SF30 13-16* tabs.

- Block 3 – Enter the Effective Date
- Block 14 – Update the reason for modification

Note: Block 14 displays the text that was entered in the **Reason for Modification** field in the **Create New Multi Contract Modification** window. The text that is carried forward to block 14 is editable.

2.2 The Addresses Tabs

The *Addresses 1* and *Addresses 2* tabs are designed to make administrative changes to addresses that currently exist in released contracts.

	Current	New
Administering Office	CARISLE BARRACKS ATTN: ATZE-DOC-C BUILDING 46 CARLISLE BARRACKS PA 17013-5002 <input type="button" value="Delete"/>	<input type="button" value="Add"/>
Payment Office	DFAS-CLEVELAND CENTER 1931 JEFFERSON DAVIS HIGHWAY CODE BJE, CRYSTAL ARLINGTON VA 22240-5281 <input type="button" value="Delete"/>	DFAS-INDIANAPOLIS CENTER ATTN: AKA EAST 56TH STREET INDIANAPOLIS IN 46249-1325 <input type="button" value="Delete"/>
Billing Address	<input type="button" value="Add"/>	<input type="button" value="Add"/>

The *Addresses 1* tab displays address blocks for the **Administering Office**, **Payment Office**, and **Billing Address**.

To make adjustments to an **Administering Office**, **Payment** or **Billing Address** on a released document, click the [**Add**] button in the correlating address block, under the heading **Current**. The address selected under the heading **Current** is the address that currently exists on the conformed copy of the award documents in PD². Once the current address is selected under the heading **Current**, the [**Add**] button under the heading **New** becomes enabled. Search for the address under the heading **New**, to update the correlating Address block in conformed documents, from the address selected under the heading **Current**.

Note: It is not recommended that the **MCM** be used to update more than one address type.

The *Addresses 2* tab displays the address blocks for the **Ship To** or **Vendor** addresses. Only approved vendor addresses may be selected.

2.3 The Clauses Tab

In addition to updating addresses on multiple released awards simultaneously, the **MCM** is used to add clauses to multiple released awards. The clause(s) to be added to multiple released awards is selected on the *Clauses* tab.

Note: Refer to pp. 225-226 in *Chapter 5: Post-Award Functions in the Procurement Desktop-Defense User's Guide, Version 4.1* for additional information on setting clause criteria in the *Clauses* tab of the **MCM**.

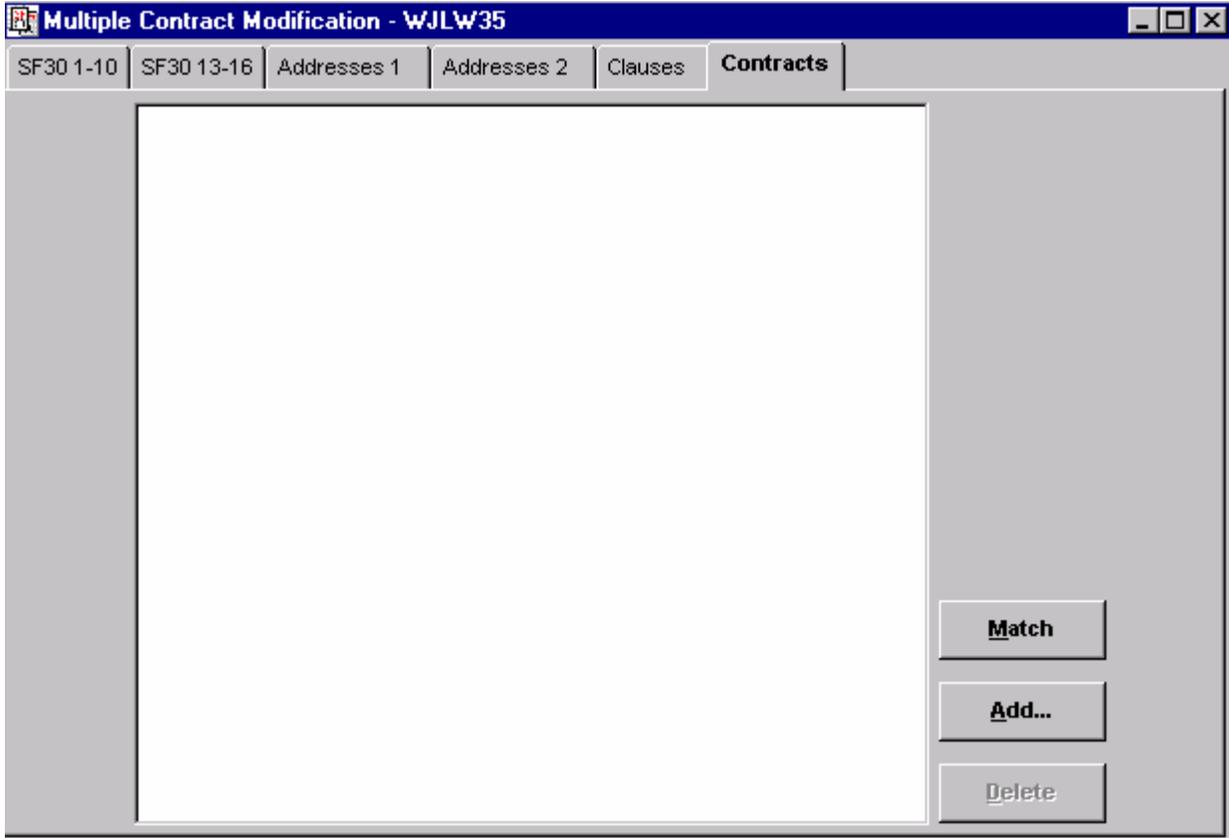
2.4 The Contracts Tab

Based on the criteria entered on the *Addresses 1*, *Addresses 2*, and *Clauses* tab, a list of conformed documents will be modified. The *Contracts* tab lists all documents in PD² that will be modified when the **MCM** is released. Initially the *Contracts* tab is blank.

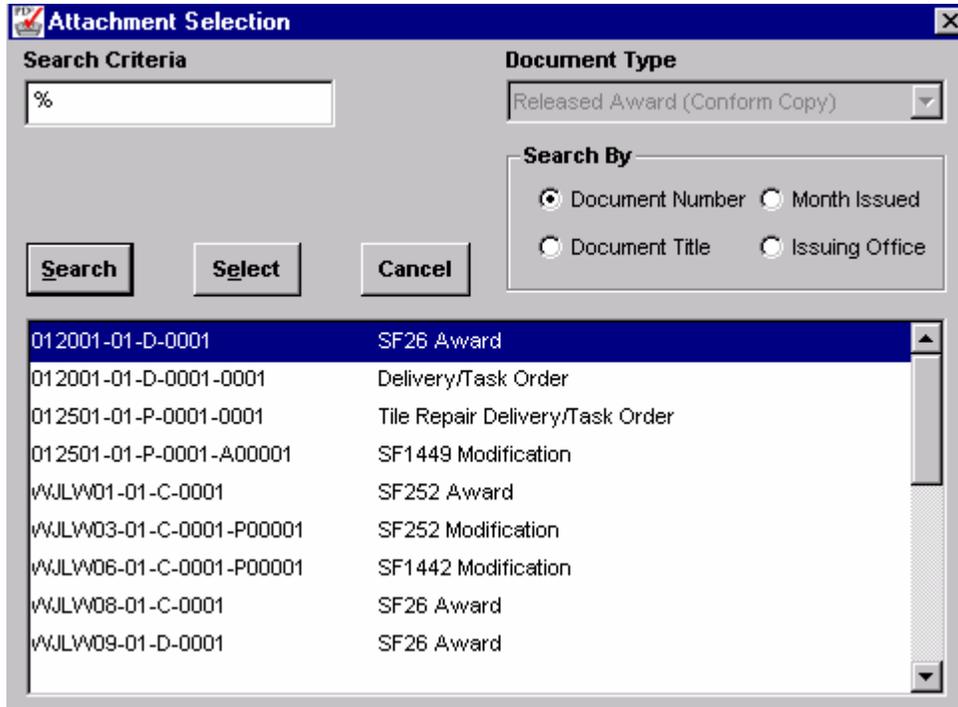
Click the [**Match**] button to retrieve a list of awards that meet the address criteria entered under the heading **Current**, in the *Addresses 1* and *Addresses 2* tab. If there are no addresses that meet the address criteria selected on the *Addresses 1* and *Addresses 2* tab, the window will remain blank. Important: Do not click the [**Add**] button to add award documents to the *Contracts* tab, when the award does not appear in the *Contracts* tab, after clicking the [**Match**] button. Although PD² will add document icons to the *Contracts* tab, "child modifications" to the awards selected will not generate when the **MCM** is released. The [**Add**] button applies to adding clauses only.

To add clauses to documents click the [**Add**] button. The documents selected, by clicking the [**Add**] button will be modified, when the **MCM** is released, to include all clauses selected on the *Clauses* tab.

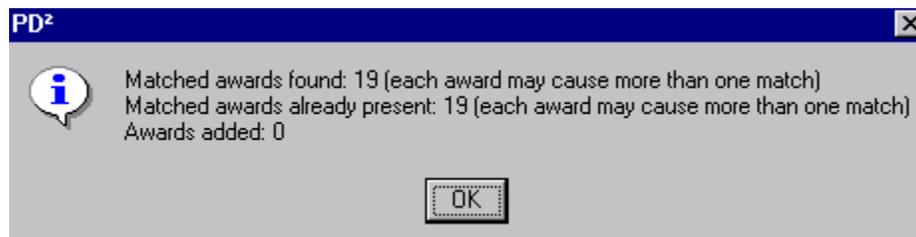
To remove document icons from the *Contracts* tab, after the [**Match**] or [**Add**] button is clicked, highlight the document icon, and click the [**Delete**] button. Only awards associated with the document icons, listed in the *Clauses* tab, will be effected when the **MCM** is released.



Note: After clicking the [Match] or [Add] button the **Attachment Selection** window opens. To select multiple contracts highlight a document icon. While holding down the <Ctrl> key, click on other document icons in the *Contracts* tab. Click the [Select] button to select the list highlighted documents in the *Contracts* tab.



When the **[Match]** button is clicked in the *Contracts* tab, PD² scans the database for any awards and Delivery Orders that contain identical addresses that correlate with the address blocks selected under the heading **Current** on the *Addresses 1* and *Addresses 2* tab. A message box informs the user of how many awards contain the same address in the correlating address block. Click **[OK]** to add the document icons to the *Contracts* tab.



Note: To remove the document icon from the *Contracts* tab, highlight the document icon, and click the **[Delete]** button.

2.5 Generation, Approval, and Release of the Modification

To generate the MCM, select **Document Options** → **Generate Document** from the menu bar.

Note: If any changes are made to the document after generation, re-generate the document. This will incorporate the changes into the final document.

Save and close the document.

Note: Click the **[Preapproval]** button in the **Approvals** window to run the pre-approval check before approving the document

Highlight the **MCM** and click the red approval checkmark on the toolbar to approve the **MCM**. Select the appropriate approval template from the list and approve the **MCM**.

Note: More than one signature may be applied to the modification. Route the **MCM** to obtain the other signatures and approval stamps. To do this, highlight the document and select the mail slot icon on the toolbar. Select the names of the applicable people on the **Routing Sheet** and click **[OK]**.

Once the **MCM** has been approved, select **Procurement** → **Post-Award** → **Release Modification** to release the **MCM**. The **Modification Type** window opens, prompting the user to select the **Administering Office Modification** or **Procuring Office Modification** radio buttons. Select the appropriate radio button and click **[OK]**.



The **MCM** will generate “child modifications” for all documents selected in the *Contracts* tab. The “child modifications”, are created upon release of the **MCM** and cannot be updated, because they are marked released when the document icon is generated. The “child modifications” generate a modification number based on the document number of the conformed document. If the last released modification of the award selected in the *Contracts* tab is “P00010”, the document number assigned to the “child modification” is “P00011”.

Note: The generation process for each contract that is associated with the **MCM** may take some time depending on the number of awards selected in the *Contracts* tab.

Once the **MCM** release process is complete a new “child modifications” will display in the same container as the conformed copy of all awards selected in the *Contracts* tab of the **MCM**.

The **MCM** cannot be printed because it is not an official procurement instrument. It is a PD² tool, used to automate the creation and release of modifications to released awards simultaneously for the purpose of changing an address or updating a clause.