

Update to Contracted Services Agreement (CSA) Amendment Process

With the transition of processing Contracted Services Agreements (CSA) in the Office of Research to the processing of Services Agreements in the Purchasing Services Department, we have made minor updates to the way CSA amendments are processed.

If a current Contracted Services Agreement needs to be amended and is less than or equal to \$10,000, then you will also need to choose the “Terms and Conditions” dropdown from “Part D. Non-Standard Terms” in the Services Agreement Specialty Form.

- The \$10,000 threshold applies to the amount entered in the “Provider’s Fees” field in “Part C. Details” of the Services Agreement Specialty Form in the PantherExpress System
- If this dropdown is not chosen for requisitions valued at less than or equal to \$10,000, then the Services Agreement Specialty Form will not route to Purchasing Services to be amended

After the procurement specialist in Purchasing Services receives the requisition and executes the amendment, the procurement specialist will not approve the submitted requisition but rather he or she will “reject” the requisition so that a new Purchase Order (PO) will not be created.

- Creation of a new PO creates problems for
 - Analyzing the total amount spent on a contract
 - Determining which PO (original or new) against which the department should submit the invoice through the “create invoice” process.
- The procurement specialist will include comments in the rejected requisition to indicate that:
 - The requisition has been properly submitted and that the amendment request has been reviewed and completed, however, the requisition is being “rejected” in order not to create another purchase order;
 - The fully executed amendment is attached;
 - You should determine the number of the purchase order in the PantherExpress System that was originally created to post and pay invoices for the CSA (thus the original PO created from the Research Sub-contract Specialty Form);
 - You should attach the fully executed amendment to the original PO, and;
 - If necessary, you should increase the value of the original PO.

For more information about the transition from CSAs issued from the Office of Research to Services Agreements issued from Purchasing Services, please review the [announcement](#).

Please contact PantherExpress Customer Service by [submitting an inquiry](#) or by phone 412-624-3578 with any questions.