

Short Form for Particulars

- Performance Based Acquittals (SFP-PBA)
- non- Performance Based Acquittals (SFP-nonPBA)
- events, products and minor assets (SFP-event)

Decision

Does the existing FS project have the Variation Workflows steps included in it?
(review the example project workflows – i.e. **Process** tab > **Workflow**)

The image displays two screenshots of a software interface for project management. The left screenshot shows a workflow configuration for 'Project: prj_13566 - Shelter - PBA'. A table lists various tasks with their status and task status. 'CONTRACT VARIATION' is highlighted in red and labeled 'NOT THIS'. 'CONTRACT CLOSE OUT' is highlighted in green and labeled 'Missing'. The right screenshot shows a workflow configuration for 'Project: prj_13454 - Shelter - PBA'. It shows a 'Particulars' section with 'Create, setup and approve contract' highlighted in green, and a 'Variations' section with 'Variations' highlighted in green.

Outcome - NO

Perform:

- the following **Variation SFP (Transitional)** instructional steps
- continue process from **Initial Variation (i.e. Amendment)** instructional steps

Variation SFP (Transitional)

Create a new TRANSITIONAL project (use template ... prj_16396 (2026.03) Transitional Social Services Contract (Particulars) Project (to vary existing contracts)

- **IMPORTANT:** Update the project attribute section (i.e. project > **Details** tab > **Settings**) with the original project number which contains the SFP contract (e.g. prj_xxxx).

In the ORIGINAL project:

Move the SFP contract (e.g. con_xxxx) to the newly created TRANSITIONAL project's workflow task: **Create, setup and approve variation 01**.

Complete the workflow task: **Manage Contract**.

Set Task As Not Applicable for the workflow task: **Close Contract (Contract Set-up)**.

Start Task for the workflow: **Prepare contract close out & send approval**.

- Send for senior director approval outlining the contract has been moved to a transitional project to enable variations.
- Gain approval.

Set Task As Not Applicable for the workflow task: **Create new contract on variation or renewal**.

Stop Task on the workflow task: **Close contract**.

Set Task As Not Applicable for the workflow task: **Close contract**.

Stop Task on the workflow task: **Close FSD**.

Set Task As Not Applicable for the workflow task: **Close FSD**.

→ The project's **Status** will be **Completed**.

Outcome - YES

Perform:

- the **Promote SFP contract to project's Variation workflow step** instructions
- Continue process from **Initial Variation (i.e. Amendment)** instructional steps

Promote SFP contract to project's Variation workflow step

Warning: Ensure the SFP contract is in workflow task: **Manage Contract**.

Navigate (via the contract's sidebar menu) to the project's workflow task.

Complete Task in project's workflow task: **Manage Contract**

In the **Promote To Task** dropdown, select **Create, setup and approve variation xx** option (where xx = 01 or the next variation number)

Click **Confirm**

Click **Confirm**

➔ The contract promotes to the selected workflow.

Initiate Variation (i.e. Amendment)

These steps are performed from within the ORIGINAL (or TRANSITIONAL) project's workflow task: **Create setup and approve variation 01**

Open the contract.

EITHER:

Click the **Create Amendment** button (top right of window)

OR

Click **Amendments** tab > **Create Amendment**

- Populate the **Title** and **Description**
- Leave ALL **Amendment Content** checkboxes checked by default

Click **Create Amendment**.

SFP – details to be update

From the SFP contract **Contents Management** tab > **MCD (Proposal Approved)**:

- Click **Create New Proposal**.
- Ensure **From Previous Proposals** is selected in the **Select Proposal Origin** dropdown list.
- (Optional) Click **Upload Annexes** hyperlink
 - Drag and Drop file/s into the **Attachments** box OR click **Select Files**
 - Click **Confirm**.
- Click **Create New Proposal**.

Navigate to the contract's **Contents Management** tab > **Clause Management**.

Click **Update Clause Versions** hyperlink against the **Obsolete Clauses** section (updates to formatting and layout in clauses in the MCD).

Check all the clause revisions listed.

Click **Update Clause Versions**.

Navigate to the Amendment created (on the **Amendments** tab, click the Amendment Title hyperlink).

Click Edit (i.e. Pencil icon - now available as contract in correct workflow task).

- Undertake amendments within Contract Duration, Contract Value, MCD, Price List, Additional Information sections.
- In Additional Information section consider:
 - adding a value in the **Contract Variation Number** field
 - a potentially deactivated value in **Service Outlet Region** field

Click **Save**.

If applicable with the amendments requested **Go to Price List**:

- click **Create Price List**
- create additional and/or modify pricing table entries including Service Type/Service User combinations
- approve the pricing table once complete.

Click **Investment Framework Lookup**

- Select Load Latest Data (wait for IRF screen to load – fetching latest data please wait)
- Select **Catchment Area** and **SA 2**
- Click **Setup Measures**
 - Modify/verify all Measures and Targets
 - Click **Preview**
 - Verify all Measures and Targets
 - Click **Save**
 - Click **Close**.
- Click **Align Targets**
 - update targets if required
 - click **Preview**
 - click **Save**
 - click **Close**
 - Click **Submit**
 - Click **Close**.
- Close the IRF screen.

From the SFP contract **Contents Management** tab > **MCD (To be Submitted)**:

- validate there are no unwanted tags in the contract (e.g. `<_DATA_ELEMENT_CTR.Contract.Variation.Number/>` or `<_DATA_ELEMENT_CTR.Service.Particulars.2/>`)
- Click **Confirm Final Approval**.

All variations are entered.

REQUEST APPROVAL (includes auto promotion to workflow task: Sign and execute validation xx)

Navigate (via the contract's sidebar menu) to the project's workflow task.

Within the task, click **Request Approval**.

Request approval from the Senior Director.

Senior Director provides approval.

→ SPF contract automatic promotes to workflow task: **Sign and execute validation xx**.

SIGN, COMPLETE AND MANAGE VARIATION

When wet signatures for the contract:

Upload attachment (Tip: SPF contract **Details** tab > **Attachments**).

Navigate (via the contract's sidebar menu) to the project's workflow task.

Click **Complete Task** in project's workflow task (Sign and execute variation xx)

Click **Confirm**

Click **Confirm**

→ SPF contract automatic promotes to workflow task: **Complete variation xx**.

Open the SPF contract.

Navigate to the Amendment created (on the **Amendments** tab, click the Amendment Title hyperlink)

Click **Complete**.

Click **OK**.

Click **Save**.

→ SPF contract amendment is completed

Navigate (via the contract's sidebar menu) to the project's workflow task.

Click **Complete Task** in project's workflow task (Complete variation xx).

Click **Confirm**.

Click **Confirm**.

→ SPF contract is promoted to workflow task: Manage variation xx.

Review variation

Open the SFP-PBA contract and confirm the **Status** is **Active** and all changes have been applied.

Login as the Contract Officer, select P2i Downstream, select Contract Management Hub, select Filter, search for the contract and then select the contract number

- Review and confirm that all changes made to the contract are as expected (i.e. funding amount, payments and reports)
- Open the Payment Allocation Tool, select the contract, review and confirm that all changes made to the contract are as expected
- Review and confirm all other changes as required