Create Mods and Options Simultaneously and Terminate Contracts in eMMA
Quick Reference Guide

Overview

This Quick Reference Guide (QRG) is intended for Procurement Officers and Buyers who need to create a *Modification (Mod)*, exercise an *Option* simultaneously for a published Contract in the eMaryland Marketplace Advantage (eMMA). It also shows you how to terminate a contract in eMMA. These instructions show how to:

- Create a *Mod* and *Option* for a Master Contract (with or without secondary competition); or
- Create a *Mod* and *Option* for Individual or Secondary-level Contract, and
- Terminate a Contract in eMMA.

This QRG assumes that the contract is already published in eMMA and the Procurement Officer/Buyer understands how to create an Amendment.

NOTE: Your Master or Individual contract must have options **already in place** to successfully complete these processes.

NOTE: For best results, use the Google Chrome browser to access eMMA.

If you need help at any time, please reach out to the eMMA helpdesk at emma.helpdesk@maryland.gov.

Step-by-Step Instructions

Create Mod and Exercise Option Simultaneously for Master Contract (with or without Secondary Competition)

This process shows how to create a Mod and Exercise Option Simultaneously for Master contracts, with or without Secondary Competition.

1. Access eMMA at https://emma.maryland.gov and click the **State SSO Login (Secure Auth)** button or the **MDOT SSO Login (MSAzure)** button, and log in with your credentials, if necessary.
2. Click the **Contracts** tab at the top of the screen and select **Browse Contracts** from the drop-down menu that opens. A list of contracts displays.
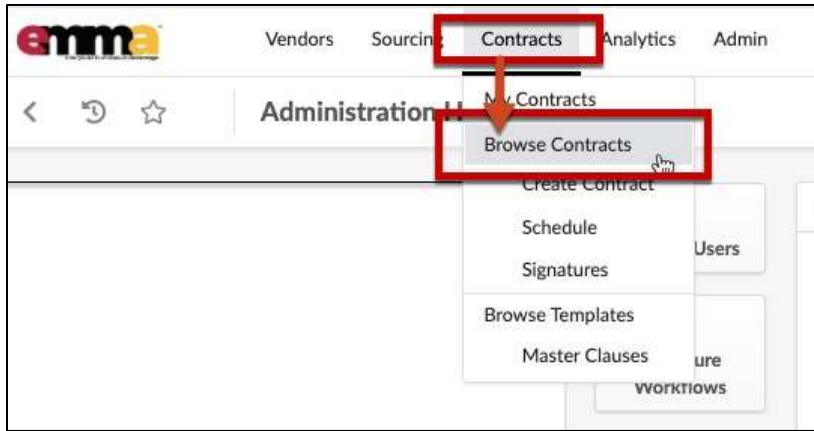
Figure 1: The Contracts tab and Browse Contracts in the drop-down menu.

3. Use the Search fields and filters to find the desired contract in the list displayed and click the Edit (pencil) icon to the left of the Control ID column header to view the contract.

    NOTE: You can also click the blue links in the Contract ID, or Contract Title columns.

Figure 2: The Edit (pencil) icon for a Contract.

4. Click the **Header** tab on the left-hand side-panel to view the contract information.
5. Click the **Other Actions** button at the top of the page and select **Create Amendment** from the drop-down menu that opens.
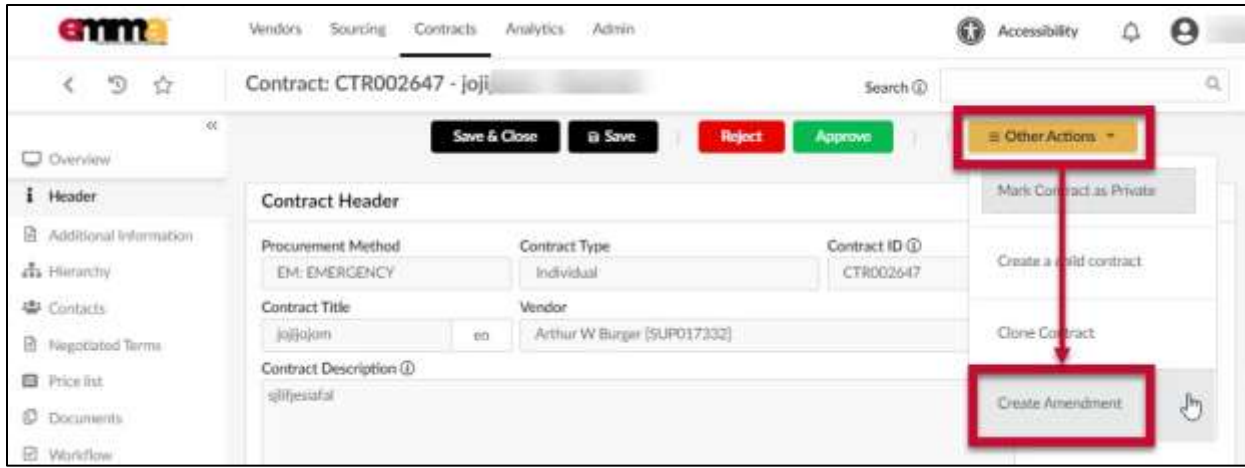
Figure 3: The Header tab in the left-hand side-panel, the Other Actions button, and Create Amendment.

6. A prompt displays. Click the **OK** button to proceed.

   NOTE: If this is the first Amendment for this contract, the amended contract number displays with "- 1" added to the original Contract ID number, and "Amendment #1" added to the original Contract Title at the top of the page. Future Amendments will increase in number accordingly.
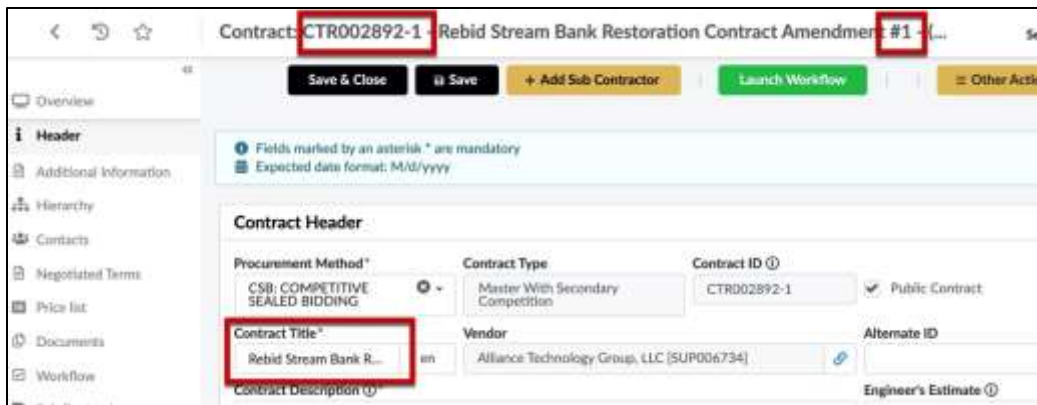

Figure 4: Amended contract with "- #" added to original Contract Number and Contract Title.

7. Click the **Amendment Type** field in the Contract Header section and select **Mods & Options Processed Simultaneously** option from the drop-down menu that opens.
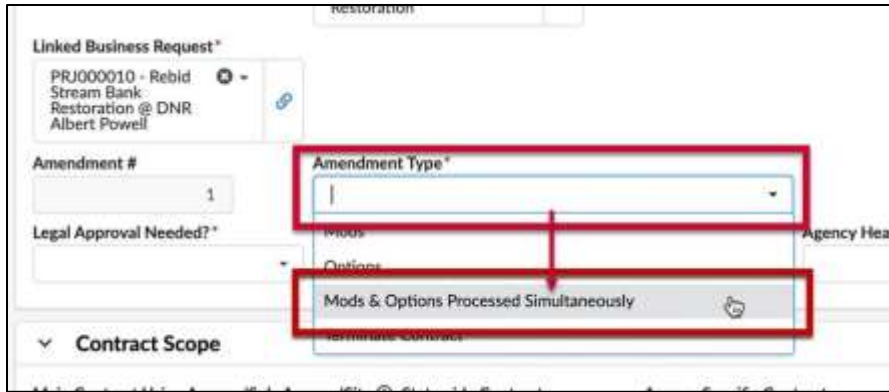
Figure 5: Amendment Type and Mods & Options Processed Simultaneously.

8. Click the **Legal Approval Needed?**, **Procurement Leadership Approval Needed?**, and/or **Agency Head Approval?** Fields and select the appropriate option from the drop-down menus.

   NOTE: These fields can be changed, as needed.

Figure 6: The Legal Approval Needed?, Procurement Leadership Approval Needed?, and Agency Head Approval? fields.

9. Scroll down to the Contract Scope section, click the **Statewide Contract** field and select the **Yes** or **No** option from the drop-down menu.
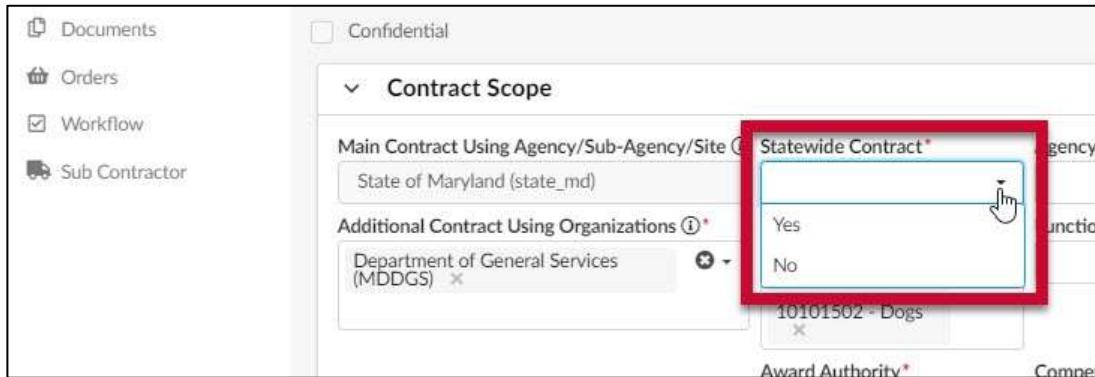
Figure 7: The Statewide Contract field and its options.

10. Click the **Save** button at the top of the page.
11. Click the Link (chain) icon next to **Linked Business Request**. A Business Request window opens.

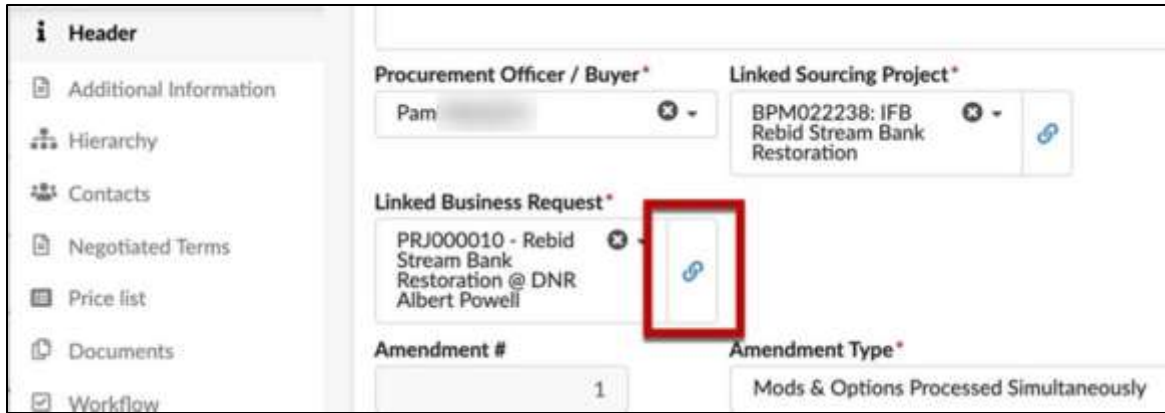   **NOTE:** A linked Business Request is required for all Master Contract types.

Figure 7: The Save button and the Link (chain) icon for Linked Business Request.

12. In the Business Request window, enter the **Revised Amount** of the program (**Original Amount + Mod Amount + Options Amount**) in the **Revised Amount** field.

    IMPORTANT!! Only the Responsible Team Member on the Business Request Team in eMMA can change the Revised Amount.

Figure 8: The Revised Amount field.

13. Click the **Save & Close** button at the top of the business request window to continue.
14. Click the **Negotiated Terms** tab on the contract window on the left-hand side-panel.

    NOTE: The **Revised Business Request Amount field** has been updated with the value entered in Step #12.

15. Enter the **Mod Amount** and **Options Amount** in their respective fields**.**
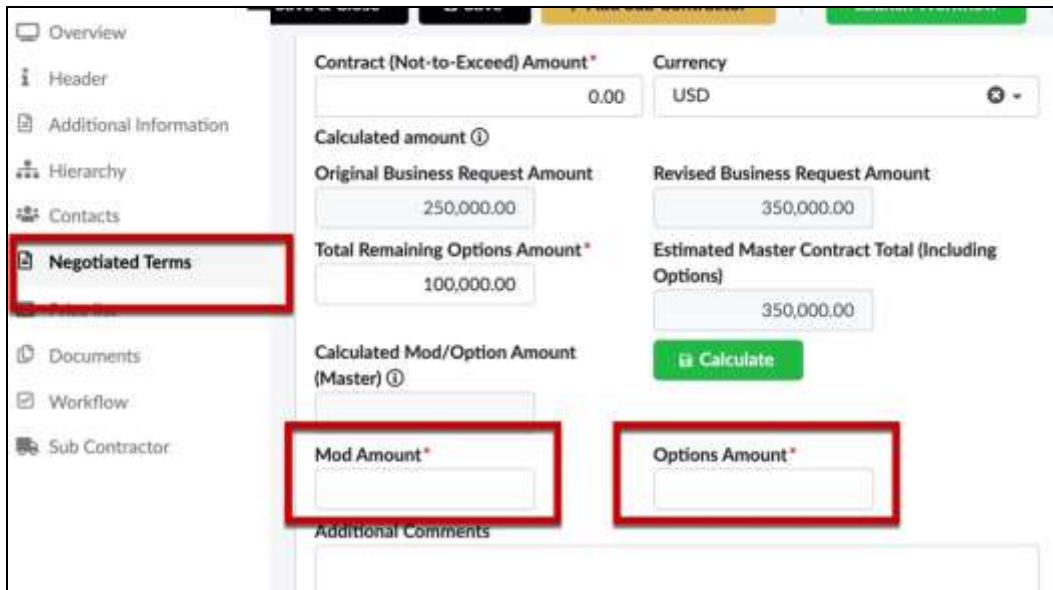
Figure 9: The Negotiated Terms tab on the left-hand side, Mod Amount, and Options Amount fields.

16. Edit the existing value in the **Total Remaining Options Amount** field. This can be done by deducting the value entered in the **Options Amount** field in Step #15.

    EXAMPLE: If the **Total Remaining Options Amount** displays as $100,000 and you exercised an **Options Amount** of $80,000 in Step #15, you would edit the **Total Options Amount** value by reducing it to $20,000.
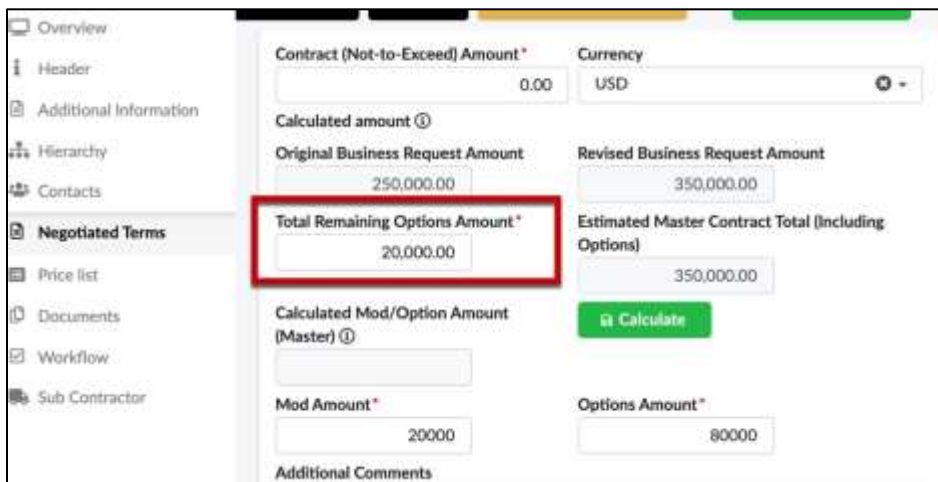

Figure 10: The Total Remaining Options Amount field.

17. Click the green **Calculate** button. This will automatically update the **Calculated Mod/Option Amount (Master)** (mod amount + options amount) and **Estimated Contract Total (Including Options)** (revised business request

amount + total remaining options amount) fields.
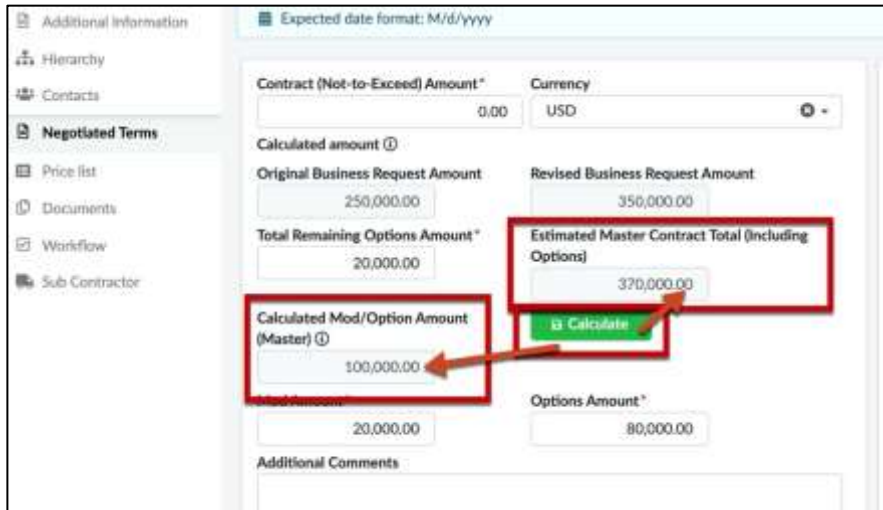
Figure 11: The Calculate button, and the Calculated Mod/Option Amount (Master) and Estimated Master Contract Total (Including Options) fields.

18. Click the **Save** button at the top of the screen.

19. (Optional) If you need to attach any required documentation, click the **Documents** tab on the left-hand side-panel and click the **+Add Document** button above the list of existing documentation.

    NOTE: You cannot upload documents larger than 300,000 KB.
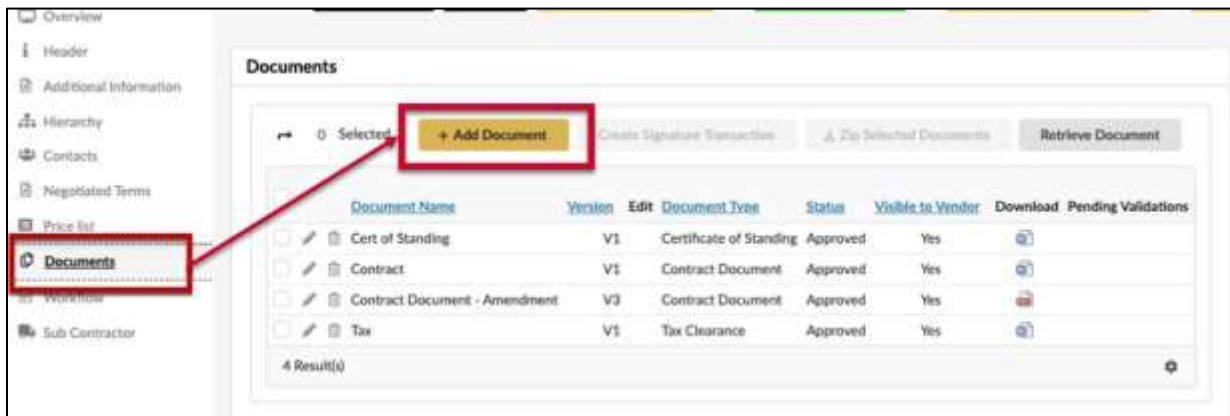
Figure 12: The Documents tab can be used to attach documentation, as needed.

a. Select the document type from the drop-down menu that opens. A Document window opens.
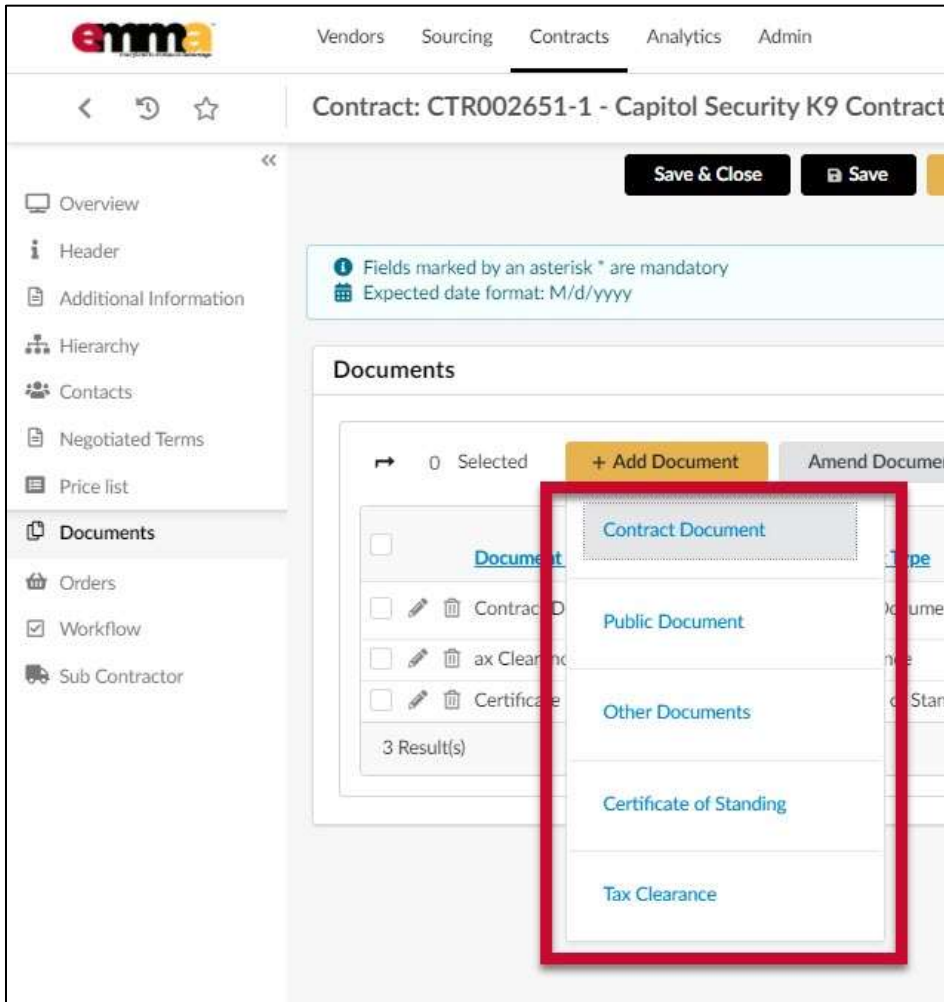
Figure 13: The +Add Documents drop-down menu.

b. In the Document window, enter the information required in the fields provided, upload the new document, and click the **Save & Close** button at the top of the Document window. Your document now

displays in the list on the Document webpage for this contract.
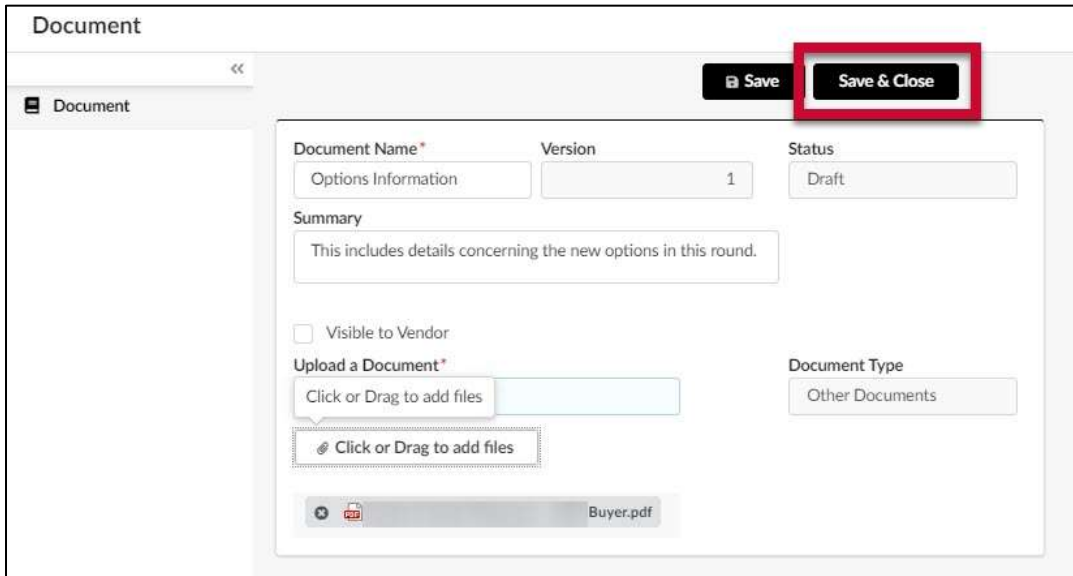

Figure 14: The Document window and the Save & Close button.

20. Click the green **Launch Workflow** button to initiate the review and approval process.

Figure 15: The Launch Workflow button.

Once the Amendment is created and the workflow is launched, eMMA will direct the contract for approvals based on the mod amount and option amount of the amendment and the established logic built into the tool.

Create Mod and Exercise Option Simultaneously for Individual or Secondary Level Contract

This process shows how to create a Mod and exercise Option simultaneously for an individual or a Secondary level contract.

1. Access eMMA at https://emma.maryland.gov and click the **State SSO Login (Secure Auth)** button or the **MDOT SSO Login (MSAzure)** button, and log in with your credentials, if necessary.

2. Click the **Contracts** tab at the top of the screen and select **Browse Contracts** from the drop-down menu that opens. A list of contracts displays.
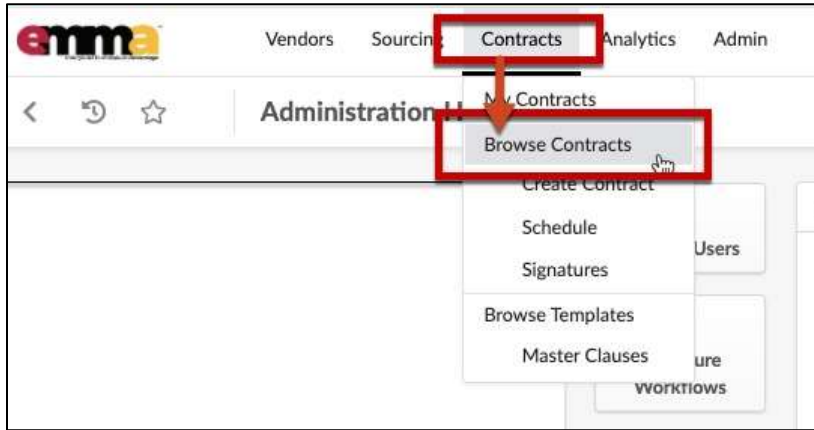
Figure 16: The Contracts tab and Browse Contracts in the drop-down menu.

3. Use the Search fields and filters to find the desired contract in the list displayed and click the Edit (pencil) icon to the left of the Contract ID to view the contract.

   NOTE: You can also click the blue links in the Contract ID, or Contract Title columns.

Figure 17: The Edit (pencil) icon for a Contract.

4. Click the **Header** tab on the left-hand side-panel to view the contract information.
5. Click **Other Actions** and select **Create Amendment** from the drop-down menu that opens.
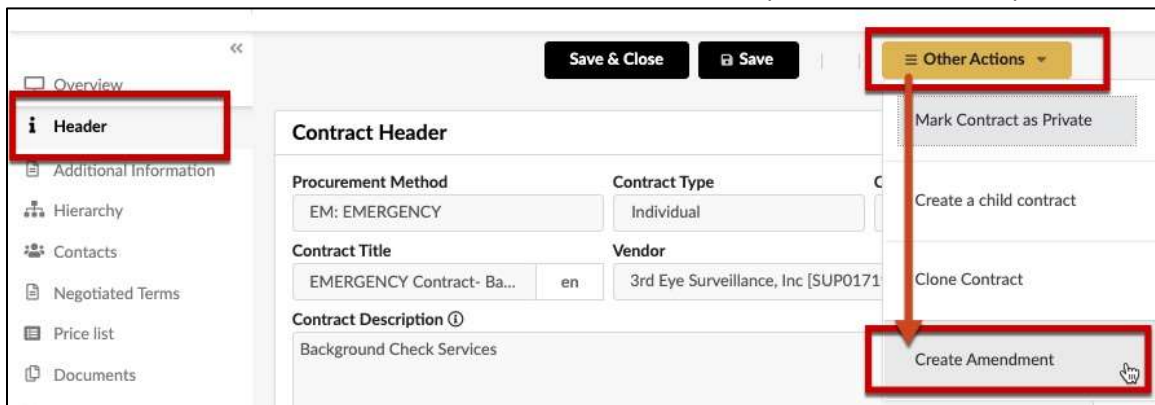
Figure 18: The Header tab in the left-hand side-panel, the Other Actions button, and Create Amendment.

6. A prompt displays. Click the **OK** button to proceed.

NOTE: If this is the first Amendment for this contract, the amended contract displays with "-1" added to the original Contract ID, and "Amendment #1" added to the original Contract Title. Future Amendments will increase in number accordingly.
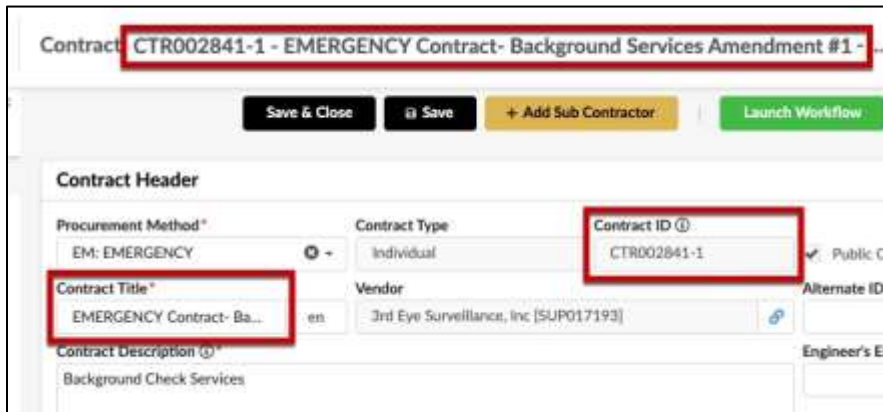
Figure 19: Amended contract with "- #" added to original Contract Number and Contract ID.

7. Click the **Amendment Type** field in the Contract Header section and select the **Mods & Options Processed Simultaneously** option from the drop-down menu that opens.
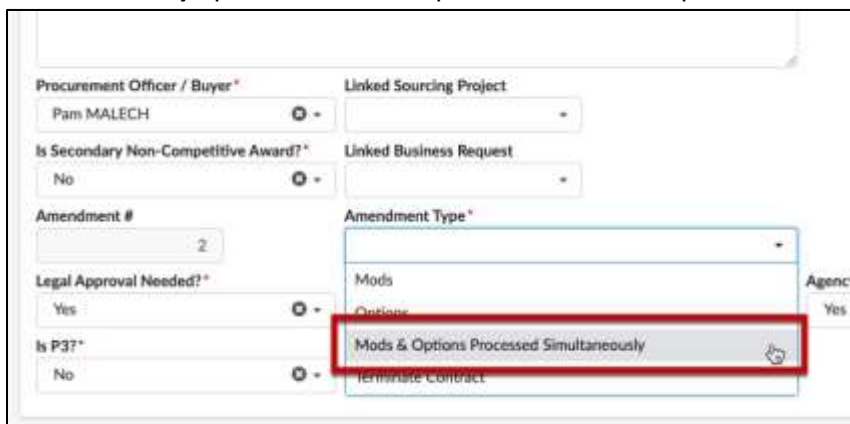
Figure 20: The Amendment Type field with Mods & Options Processed Simultaneously selected.

8. Make any changes needed to the **Legal Approval Needed?**, **Procurement Leadership Approval Needed?**, and/or **Agency Head Approval?** fields.

NOTE: These fields can be changed, as needed.
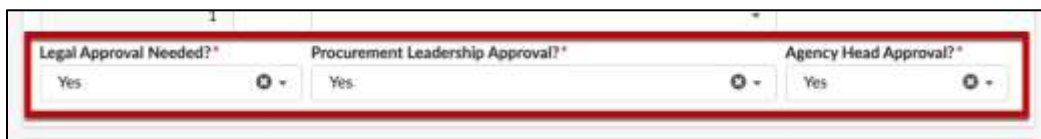
Figure 21: The Legal Approval Needed?, Procurement Leadership Approval Needed?, and Agency Head Approval? fields.

9. Scroll down to the Contract Scope section, click the **Statewide Contract** field and select the **Yes** or **No** option from the drop-down menu.

Figure 22: The Statewide Contract field and its drop-down menu.

10. Click the **Negotiated Terms** tab on the contract window on the left-hand side-panel. Enter the **Mod Amount** and the **Options Amount** in the respective fields.
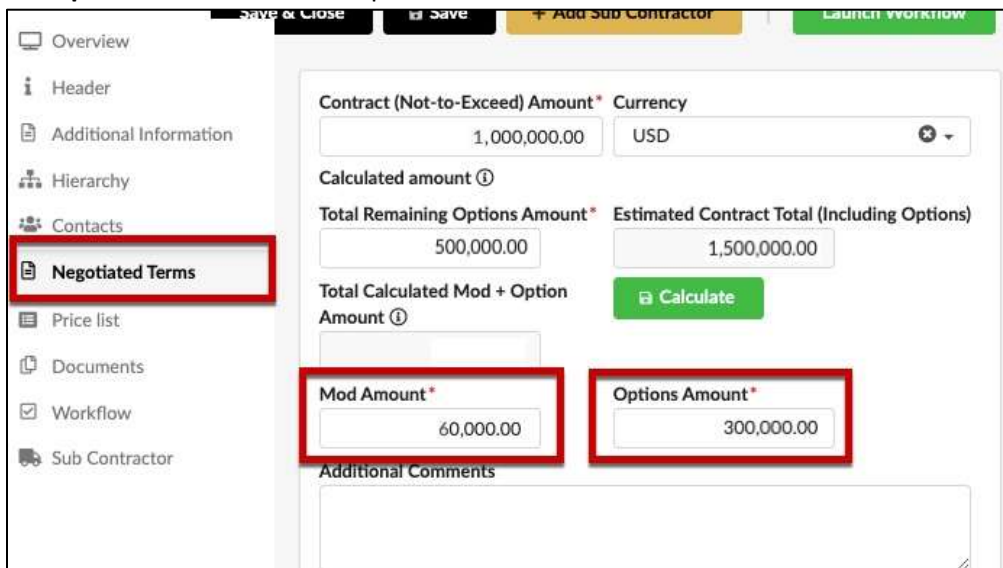

Figure 23: The Negotiated Terms tab with the Mod Amount and Options Amount fields.

11. Edit the value in the **Total Remaining Options Amount** field by deducting the value entered in the **Options Amount** field in Step #10.

EXAMPLE: If the **Total Remaining Options Amount** displays as $500,000 and you exercised an **Options Amount**

of $300,000 in Step #10, you would edit the **Total Options Amount** value by reducing it to $200,000.

Figure 24: The Total Options Amount field adjusted for the Options Amount.

12. Edit the value in the **Contract (Not-to-Exceed) Amount** field by entering the sum of the original **Contract (Not-to-Exceed) Amount**, the **Mod Amount**, and the **Options Amount**.

    EXAMPLE: If the original **Contract (Not-to-Exceed) Amount** = $1,000,000, the **Mod Amount** = $60,000, and the **Options Amount** = $300,000, you would edit the **Contract (Not-to-Exceed) Amount** field to display $1,360,000.

Figure 25: The original Contract (Not-to-Exceed) Amount, the Mod Amount, and the Options Amount are added together and entered in the Contract (Not-to-Exceed) Amount field.

13. Click the green **Calculate** button in the middle of the form. This will automatically update the **Total Calculated Mod+Option Amount** (**Mod Amount + Options Amount**) and **Estimated Contract Total (Including Options)** (**Contract Not-to-Exceed Amount + Total Remaining Options Amount**) fields.

Figure 26: The Calculate button updates the Total Calculated Mod + Option Amount and Estimated Contract Total (Including Options) fields.

14. (Optional) If you need to attach any required documentation, click the **Documents** tab on the left-hand side-panel and click the **+Add Document** button above the list of existing documentation.

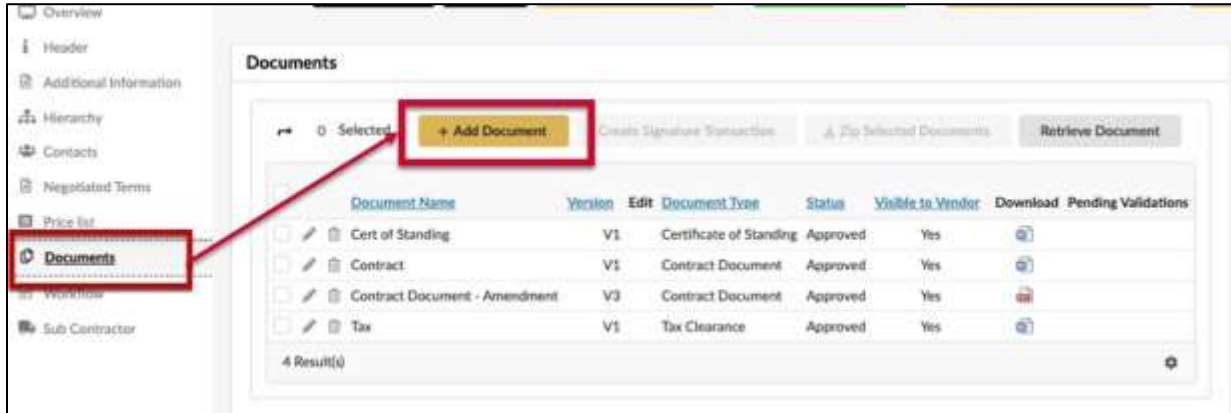   **NOTE:** You cannot upload documents larger than 300,000 KB.

Figure 27: The Documents tab can be used to attach documentation, as needed.

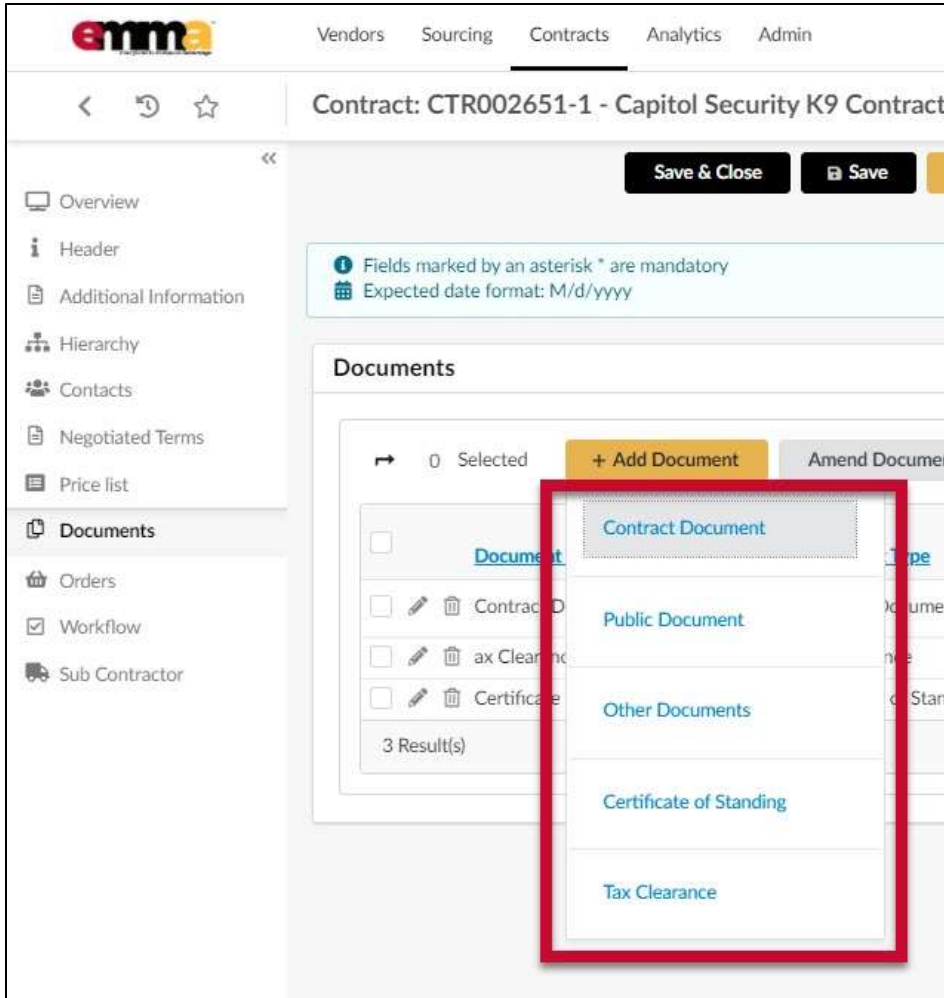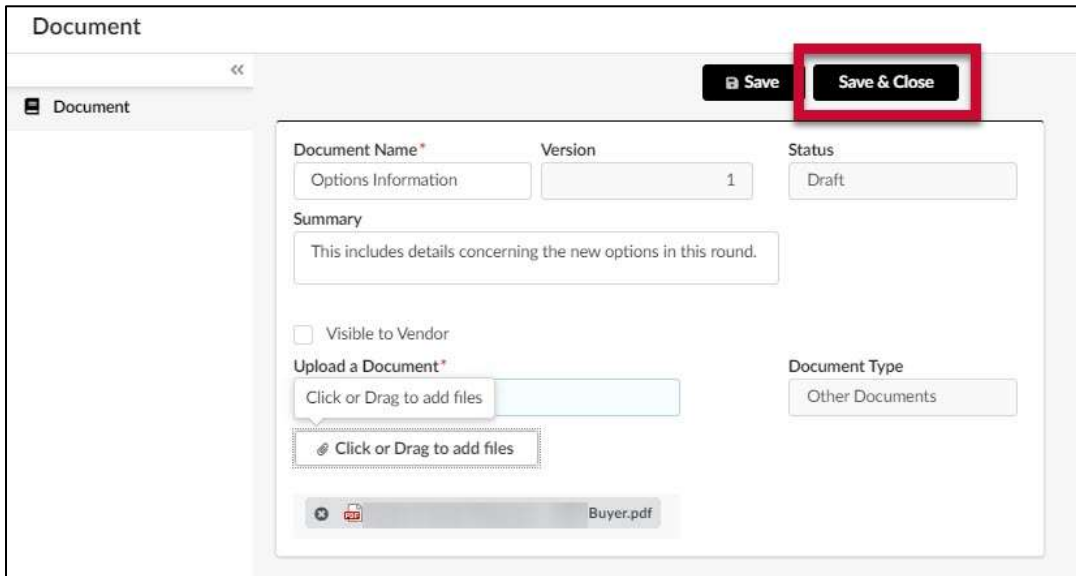   a. Select the document type from the drop-down menu that opens. A Document window opens.
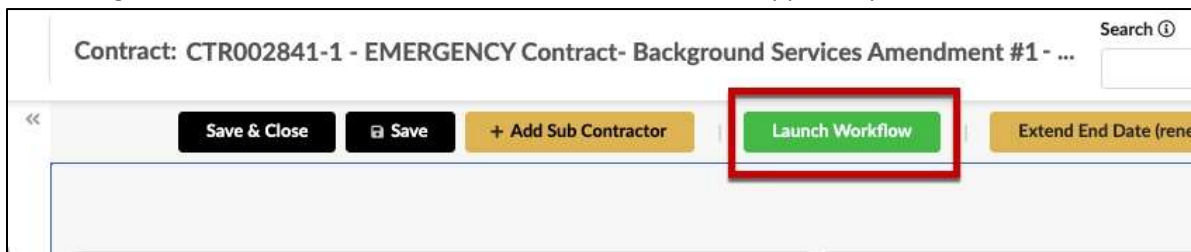

Figure 28: The +Add Documents drop-down menu.

b. In the Document window, enter the information required in the fields provided, upload the new document, and click the **Save & Close** button at the top of the Document window.

Figure 29: The Document window and the Save & Close button.

15. Click the green **Launch Workflow** button to initiate review and approval process.

Figure 30: The Launch Workflow button to initiate review and approval.

a. Click the red **DocuSign** button at the top of the Workflow page to use the DocuSign service. The Signature Type point in the process turns red after you click it. The Vendor listed will receive an email

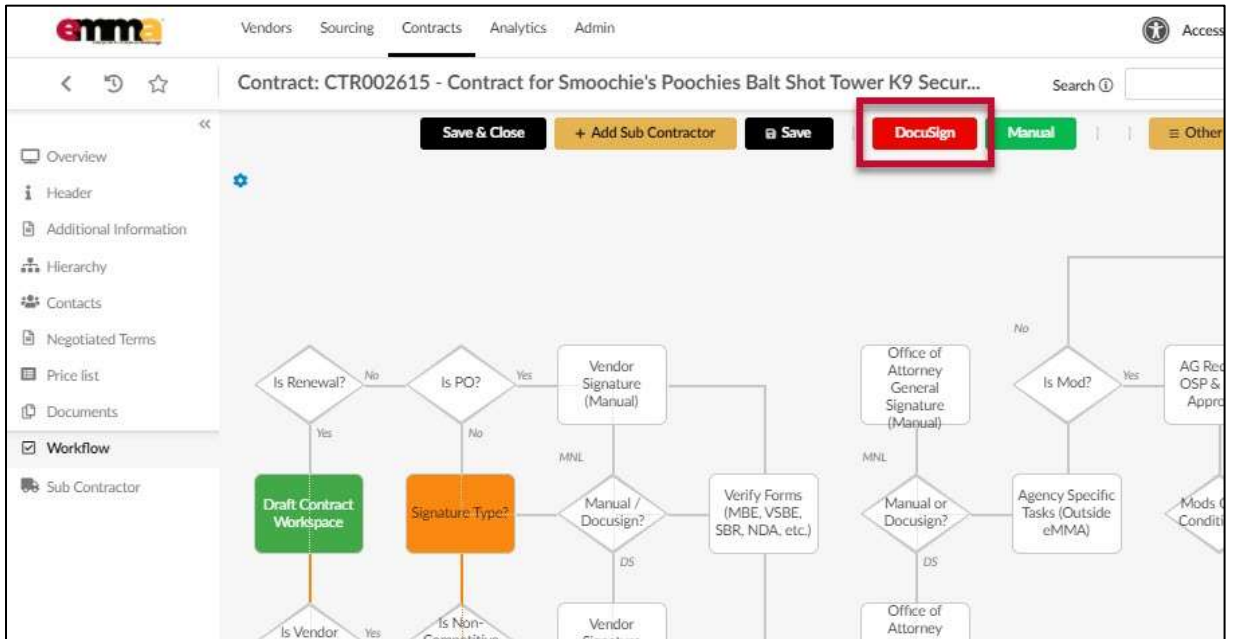from DocuSign with the contract attached and guidance as to where to sign.

Figure 31: The DocuSign button on the Workflow page for electronic signatures in eMMA.

b. Click the green **Manual** button at the top of the Workflow page to obtain a signature manually. The Signature Type point turns green after you click it.
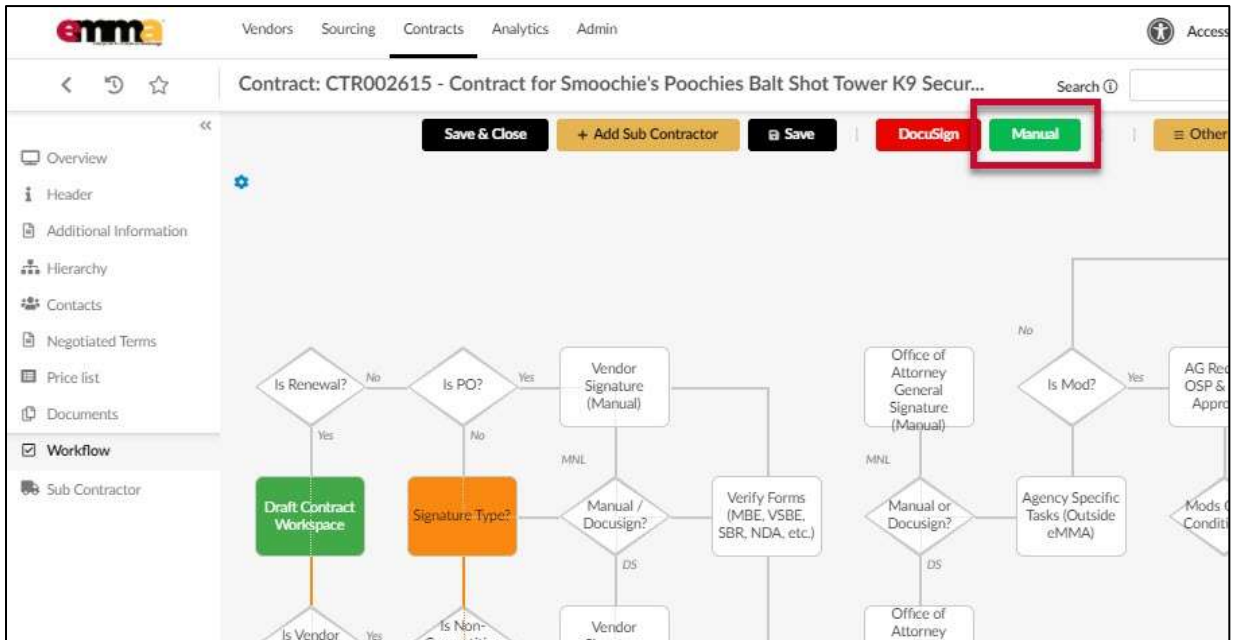

Figure 32: The Manual button on the Workflow page for manual signatures in eMMA.

16. Click **Save** at the top of the Workflow page and continue as needed through the workflow.
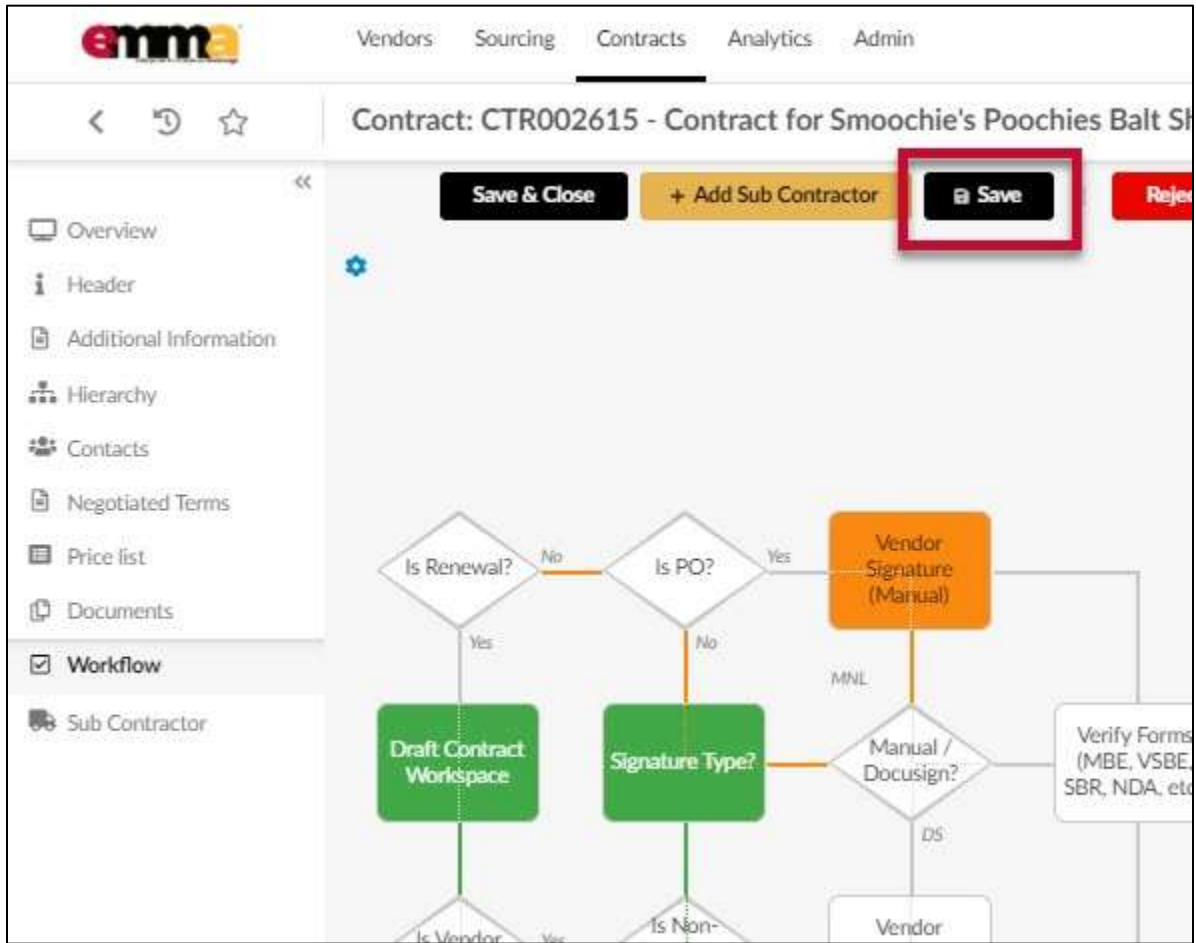

Figure 33: The Save button at the top of the Workflow page.

Once the Amendment is created and the workflow is launched, eMMA will direct the contract for approvals based on the mod amount and option amount of the amendment and the established logic built into the tool.

Terminate a Contract in eMMA

This process shows how to terminate an established contract in eMMA.

NOTE: This QRG uses diagrams with specific callouts to show required and optional fields in forms. A yellow callout with

a red border   indicates a required field, while yellow callouts with a black border   indicate optional fields. Letters within the callouts correspond to the explanations below the diagram.

NOTE: Additional fields may display depending on your selections.

1. Access eMMA at https://emma.maryland.gov and click the **State SSO Login (Secure Auth)** button or the **MDOT SSO Login (MSAzure)** button, and log in with your credentials, if necessary.
2. Click the **Contracts** tab at the top of the screen and select **Browse Contracts** from the drop-down menu that opens. A list of contracts displays.
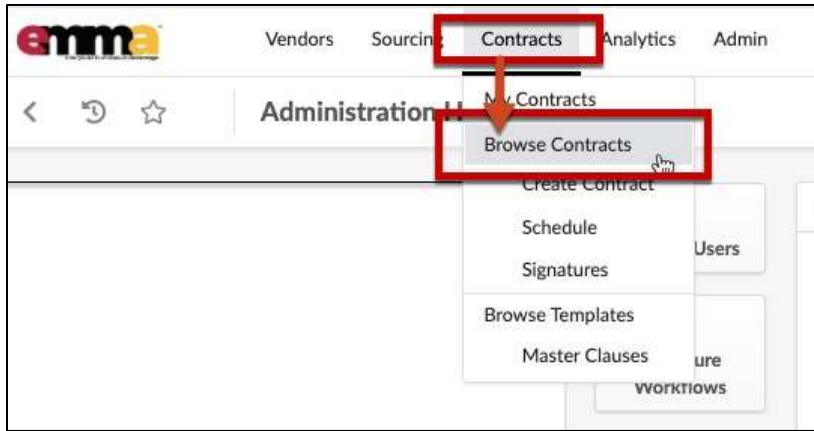
17

Figure 34: The Contracts tab and Browse Contracts in the drop-down menu.

3. Use the Search fields and filters to find the desired contract in the list displayed and click the Edit (pencil) icon to the left of the Control ID column header to view the contract.

    NOTE: You can also click the blue links in the Contract ID, or Contract Title columns.

Figure 35: The Edit (pencil) icon for a Contract.

4. Click the **Header** tab on the left-hand side-panel to view the contract information.
5. Click the **Other Actions** button at the top of the page and select **Create Amendment** from the drop-down menu that opens.
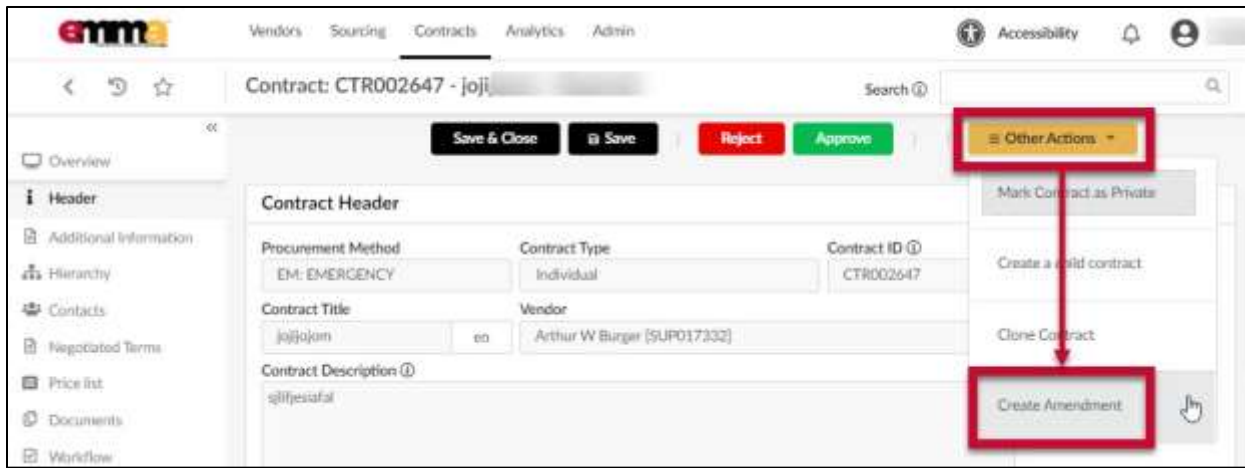
Figure 36: The Header tab in the left-hand side-panel, the Other Actions button, and Create Amendment.

6. A prompt displays. Click the **OK** button to proceed.

    NOTE: If this is the first Amendment for this contract, the amended contract number displays with "- 1" added to the original Contract ID number, and "Amendment #1" added to the original Contract Title at the top of the page.
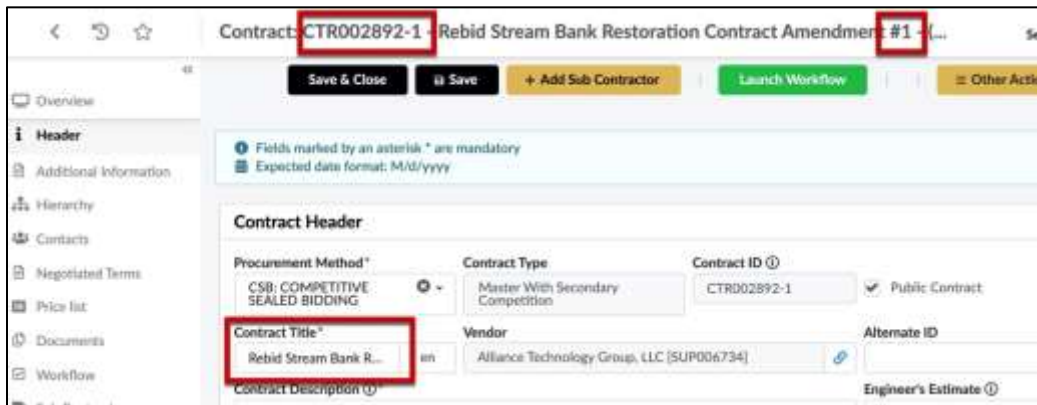

Figure 37: Amended contract with "- #" added to original Contract Number and Contract Title.

7. Click the **Amendment Type** field in the Contract Header section and select the **Terminate Contract** option from the drop-down menu that opens. A pop-up window displays. Click the **OK** button in the pop-up window. The webpage refreshes.
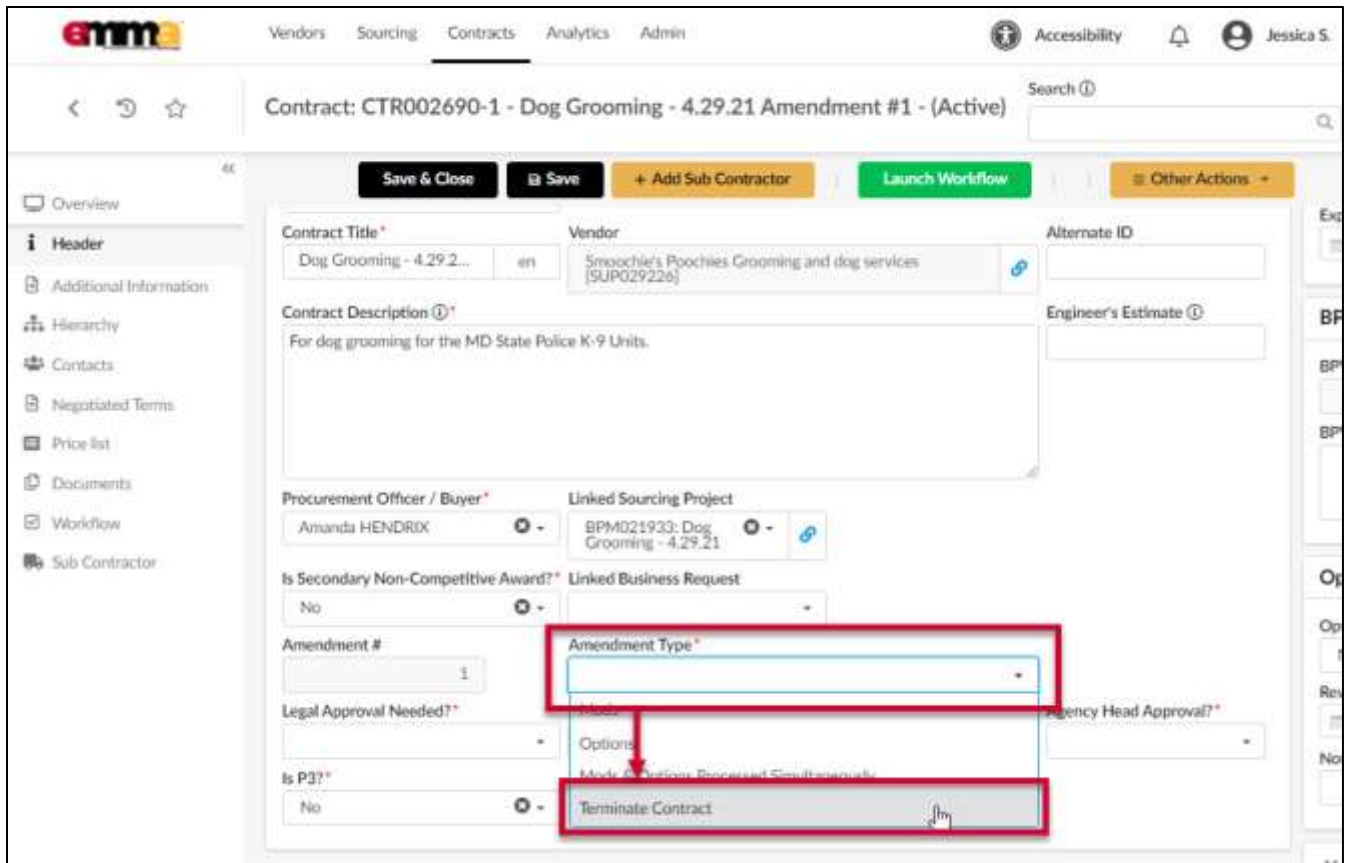
Figure 38: Amendment Type and Terminate Contract option.

8. Enter required information in the empty approval fields. A red asterisk (*) indicates a required field.

Figure 39: The Procurement Leadership Approval and Agency Head Approval fields.

a. **Procurement Leadership Approval?*:** Does this contract termination need Procurement Leadership Approval? Click the field to open the drop-down menu and select Yes or No.

b. **Agency Head Approval?*:** Does this Contract termination need Agency Head Approval? Click the field to open the drop-down menu and select Yes or No.

9. Enter required information concerning the termination in the **Termination** section on the right-hand side of the screen. You may need to scroll horizontally to see this section.
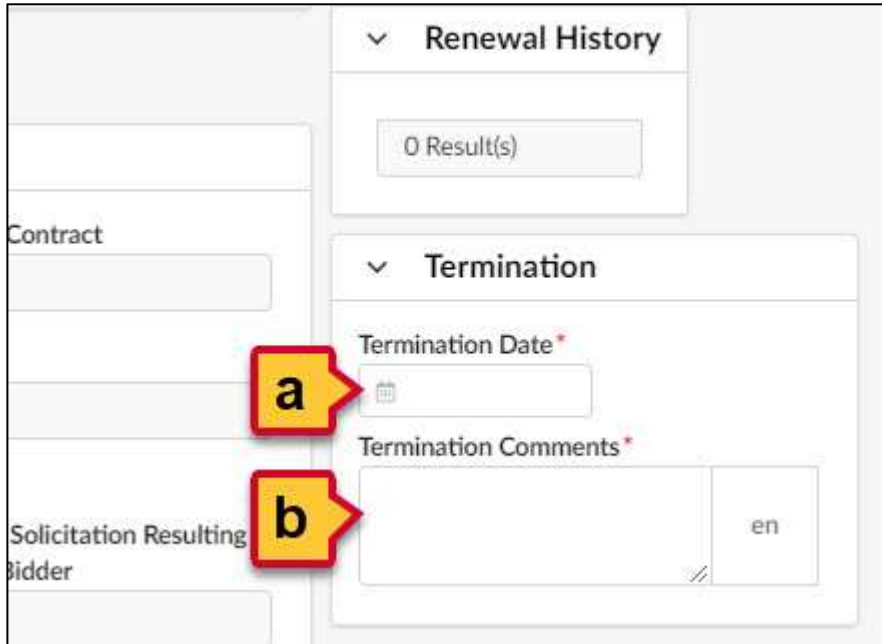

Figure 40: The Termination Date and Termination Comments field.

   a. **Termination Date*:** Click this field and select a date for the contract to terminate from the calendar that displays.

   b. **Termination Comments*:** Enter comments about the contract termination in this field.

10. Click the **Save** button at the top of the web page. The contract page will refresh and will show as **Expired**.
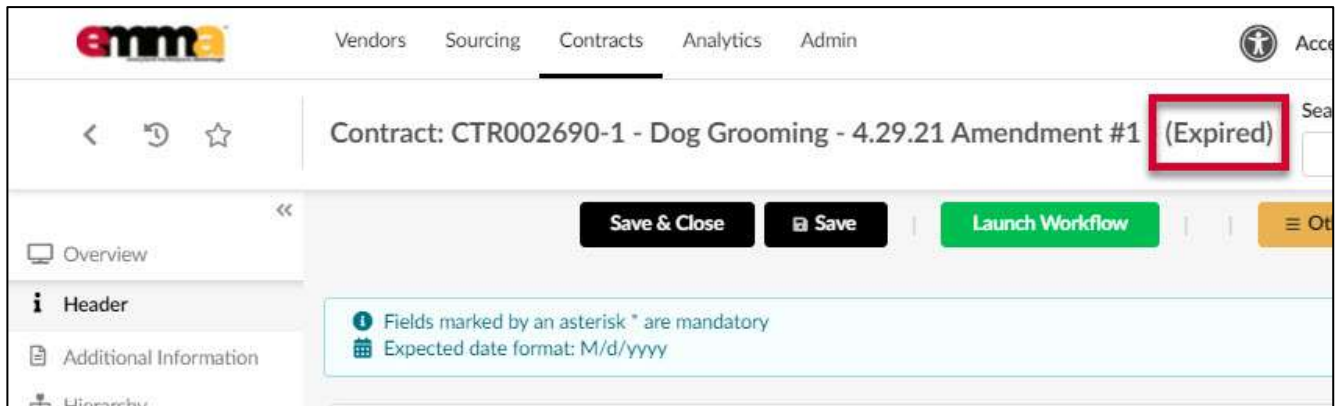

Figure 41: A terminated contract in eMMA.

Your Contract in eMMA is now terminated.