Quick Reference Guide: Creating a General Routing (GR) Document

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PURPOSE

The purpose of this quick reference guide is to illustrate the steps in the Advantage system for creating a general routing (GR) document for a paperless modification (paperless mod) request.

A paperless mod is a modification to a contract (CT) document that doesn't require a paper contract amendment form to be completed. **You would NOT create a GR for a paperless mod to a Delivery Order (DO) paperless mod.**

Paperless mods <u>can</u> be used for the following purposes:

- change the chart of accounts in a contract without changing the total dollar value;
- add project-specific coding;
- reinstate lapsed funding; and/or
- close out a CT that shows the service date has ended and final payment has been made.

Paperless mods <u>can't</u> be used to change a contract's expiration date, dollar amount, or scope of services. These changes require a paper contract amendment form.
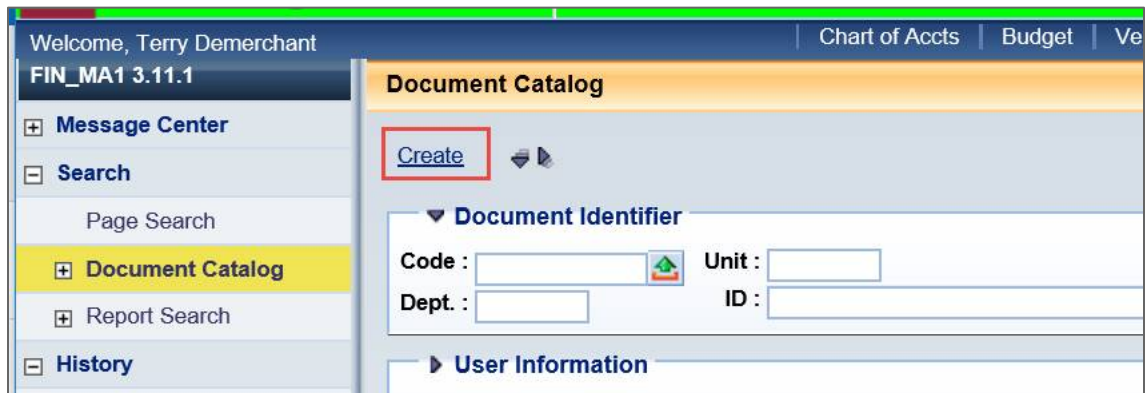
BENEFITS OF USING GR DOCUMENT FOR A PAPERLESS MOD

Submitting a GR document through Advantage <u>eliminates the need for agencies to send an email to the Purchases, DAFS email box</u> requesting a paperless mod approval.

This process also allows the Division of Procurement Services to track the number of paperless mod requests submitted monthly.

STEPS TO CREATE GR DOCUMENT FOR A PAPERLESS MOD

1. Click on Document Catalog, then click **Create.**

2. In the **Document Identifier** section, enter the following:

   a. Code – Enter **GR**.

   b. Dept – Enter your department number.

   c. ID – Enter the first 8 digits of the CT number you are modifying, followed by 2 zeros, then the last four digits of the CT number, followed by the version number at the end

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(see sample below).

NOTE: You do not need to enter a Unit number since the GR document will not be routed to your approver. You can also leave Auto Numbering unchecked.

    d. Click **Create**.

3. After the GR document appears, enter the following:

    a. Status – Keep as **Pending Review**.

    b. Category – Select **General Request** from the picklist.

    c. Sub Category – Select **Paperless Mods** from the picklist.

    d. Document Name – Enter the reason for the modification. This description will help the Division of Procurement Services determine the purpose of the paperless mod request and it will speed up the process of approving the document (as long as Procurement Services doesn't have to contact you for more information). The Document Name field is space limited, but you will have the Extended Description tab to use if you need more space.

    e. Amount – If you are putting back lapsed funds, enter the lapsed fund amount. If the modification doesn't require an amount change, enter 0.00.

    f. Requester ID – Enter your ID and click **Save** in the lower left. This will bring in the rest of

the information tied to your ID.

1. Save, validate and check for errors; then click **Submit.**

The document will be routed to the Division of Procurement Services for approval.

Questions? Contact Terry Demerchant in the Division of Procurement Services.