



## Summary

### Objective

To complete a variation to a contract and send to a supplier.

**Owner** Name withheld

**Expert** Name withheld

## Procedure

### 1.0 Update the Variation letter

Contract Administrator

- a Save the variation letter using the correct naming conventions.

**NOTE** Where is the variation letter saved and what is the naming conventions?

Documents are saved in the project folders I: \PSD\03 Health Procurement\01 Contract Mgmt and the naming conventions can be found here: - PSD\03 Health Procurement\09 Report Plan Procedure\File Path and Naming Conventions.xlsx

- b Open the variation letter and accept all changes.

- c Turn tracked changes off.

- d Add a logo on the top right side of the letter.

**NOTE** Where do you retrieve the logo from?

The logo is located here: I:\PSD\03 Health Procurement\09 Report Plan Procedure\E Signatures

- e Ensure appropriate paragraphs are in red, bold and the date and contact details are correct.

**NOTE** What paragraphs are required to be in bold?

Please ensure your delegated authority confirms formal acceptance of this variation by replying to this email on or before 23 May 2018. By accepting this variation via email, you agree and accept all the terms of this variation. Please retain this email for your records.

If you have any questions regarding this variation, please email Procurement Specialist using their acc email address.

### 2.0 Complete Mail merge using the Ribbon

Contract Administrator

- a Go to your email merge document.
- b Go to the [Mailings] tab and click on [Start Mail Merge].
- c Click on [ Select Recipients] and select use an existing list.
- d Select the [Print Area] version.
- e Click [Insert Merge Field] and add all relevant fields in the relevant places.
- f Click [Finish & Merge] and then select [Finish merge].
- g Select [Send Email messages].
- h Select the email address and in the subject line, type "Variation – Service Name and prefix" which will create all the emails directly into your outbox and if you have DHBs, you will now need to add the printable PDF.

### 3.0 Complete DHB PDF Version

Contract Administrator

- a Open the [Variation] template.
- b Add the signature required.
- c Delete and replace appropriate fields.

**NOTE** What are the fields to delete and replace?

1) Delete the following:

Please ensure your delegated authority confirms formal acceptance of this variation by replying to this email on or before 23 May 2018. By accepting this variation via email, you agree and accept all the terms of this variation. Please retain this email for your records.

2) Replace with this:

Please ensure your delegated authority confirms formal acceptance of this variation by printing and signing below. Retain this copy for your information.

- d Complete the mail merge and save each letter as a printable version.

**NOTE** Where do you save the printable version?

Documents are saved in the project folders I: \PSD\03 Health Procurement\01 Contract Mgmt.

### 4.0 Setup the CLR

Contract Administrator

- a Open the CLR.
- b Set up a new worksheet named – Var20##
- c Complete the CLR template.

### 5.0 Receive Response

Contract Administrator

- a Open the email.
- b Save the email as: ABC1234.YYYY in the correct HW numbered folder here: I:\PSD\09 Executed Docs
- c Track this in the CLR.