



QUICK REFERENCE GUIDE:

# Change Orders – Creating & Submitting

## Background:

In order to create a Change Order, the contract must be Active.

## Roles:

Construction Office Engineer, Construction Project Engineer

## Navigation:

Construction > Contract Progress > Contract > Change Orders Tab

1. To add a Change Order, click the **Add** button.
2. In the General tab, enter the **Assigned Change Order Number**, **Summary of Changes(s)**, and **Change Order Type** (DO NOT SELECT the TYPE of ADMINISTRATIVE if this is a change to the contract and the Contractor will sign this Change Order. Administrative Change Orders are ONLY for internal corrections such as an incorrect Completion date being entered in Preconstruction or changing assigned funding. Incorrectly selecting a type of Administrative will cause the Contract Closeout paperwork to render in unexpected ways).
3. Enter the **Author**, **Reason** and click **Save**.
4. Enter the **CO Backup Explanation** field (this will populate the Change Order Backup Report). Click **Save**.
5. In the General tab scroll down to enter the **Description of Change**, using the **Order** and **Explanation** fields. The Description of Change will be the narrative displayed in the Description of Change section of the Change Order Report.
6. Click **Save**.

## *Increase/Decrease Items*

7. Click the **Select Items** button to open a modal window.
8. In the Select Items window, find and select the contract project items to be increased or decreased in quantity.
9. Click the **Add to Change Order** button at the bottom of the modal window.
10. Enter the **Quantity** and **Amount to Encumber** for each item.
  - a. If deleting an item, the Quantity should be entered as a negative value, modifying the item's Curr Qty. After the item is deleted make sure to follow the *Contracts - Marking Contract Items Complete QRG*.
  - b. The **Amount to Encumber** field populates the encumbrance amounts on the Change Order Backup report. If there are multiple items modified charging to the same funding source the CO backup will only display the total of these **Amount to Encumber** fields.
11. Click **Save**.

## *New Items*

12. Click the **Select New Item** button to open a modal window.
13. In the Select New Item window, use the **Reference Item** autocomplete to find and select the new item to add to the contract. From the list of project categories, select the **Project Category** for the new item.\*
14. Click the **Add to Change Order** button at the bottom of the modal window.

If you need further assistance please contact your Module Admin

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15. Enter the **Quantity, Funding, Unit Price, Amount to Encumber, Supplemental Description,** and **Contractor** (optional) for the new item. If the new item requires new Funding on the Contract, refer to the *Change Order – Adding Funding QRG*. Click **Save**.
  - a. The Amount to Encumber populates the encumbrance amounts on the Change Order Backup report. If there are multiple items modified charging to the same funding source the CO backup will only display the total of these **Amount to Encumber** fields.
16. After adding any new item to a Change Order, follow the the *Agency Views - Adding for Contract Items QRG*.

\* If you are not able to find an item in the correct specification section with the unit of measure that you need, please reach out to your module admin, who will in turn reach out the Items Admin in your section and region. Please be prepared to provide all materials included in the item and any additional requirements associated with this item.

### *Unattached Items* (used to add IWA items via change order)

17. Click the **Select Unattached Item** button to open a modal window.
18. In the Select Unattached Item window, use the search bar and filters to find and select the unattached items to include in this change order. Unattached Items will only be available to select if added per the *Contracts - IWAs: IWA AV and Unattached Items QRG*.
19. Click the **Add to Change Order** button at the bottom of the modal window.
20. Enter the **Quantity, Funding, Unit Price, Amount to Encumber** (optional), **Supplemental Description** (optional), and **Contractor** (optional) for the unattached item. Click **Save**.

### *Time Adjustments*

21. Click the **Select Contract Time** button to open a modal window.
22. Click **Show first 10** to display all contract times.\*\*
23. Click the **Add Time Adjustments to Change Order** button at the bottom of the modal window.
24. Enter the **Adjusted Completion Date OR Adjusted Time Unit** for the contract time.
25. Click **Save**.

\*\* If no Contract Times are available, navigate to the Contract Site Times. From the Contract Administration Summary select the **Contract Times** tab, scroll to the bottom and click the **Time ID** link. Click the **Units and Dates** tab and populate the **Start Time** field (this should be the award date) and click **Save**. Click the **General** tab and populate the **Effective Date** with today's date and toggle the **Status** to *Active*. Click **Save**.

### *Contract Claims*

26. Click the **Select Contract Claim** button to open a modal window. In order to add a claim to the contract refer to the *Contracts – Claims QRG*.
27. In the Select Contract Claim window, use the search bar and filters to find and select the contract claim that this change order addresses.
28. Click the **Add to Change Order** button at the bottom of the modal window.
29. Click **Save**.

### *Approval Tracking*

30. After submitting the change order for approval, the system will display the Approval Groups necessary to approve this change order



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based on the Change Order Type, Contract Type, and Change Order Amount.

## *Submitting Change Order*

31. Prior to submitting the change order for approval, use the **Component Actions Menu** to generate the **Change Order Report** and **Change Order Backup** to ensure the information populates on the reports as expected.
32. On the Contract Change Order Summary, click the **Component Actions Menu** in the upper right corner.
33. In the Tasks section, select **Submit For Approval**. The system will change the Status of your Change Order to Pending Approval.

Notes: If you need to delete a Change Order, it must be the most recently created change order (not necessarily the highest assigned change order number). You must remove any item increases/decreases, time adjustments and new items from the change order before selecting the **Component Actions Menu** and selecting **Delete**.