



## QUICK REFERENCE GUIDE:

# Change Orders – Adding Funding

## Background:

When an item added by Change Order has a different funding source, but the Program code (Project ID) remains the same, only a new fund package needs to be added. When the new funding has a different Program code, both a new fund package and a new Project will need to be added. To select the correct funding package and project, this process must be completed before adding the new item to the change order.

## Roles:

Construction Funding User

## Navigation:

### *Adding a Fund Package*

Contract Administration > Contract > Funding Tab

1. Click the **Select Fund Package** button and use the search field to find and select the correct Fund Package. Once selected, press **Add Fund Package**.
2. Click the **Fund** link for the newly added Fund Package. Enter the Project ID at the end of the **Fund Package Description** and press **Save**.
3. Click the **Select Funds** button and use the search field to find and select all funds to be added to the Fund Package.
  - a. If there is Federal and matching funding, make sure to add the Federal Fund Package and the associated matching Fund Package (i.e. if the federal fund was 05-4R the State fund that should be used would be 05-4R-SOA), or other local match.
4. Expand the first fund, enter a **Priority** of 1\* and the **Percentage** (if there are two funds in the fund package with the same priority the Percentages must equal 100).

5. Enter the **Template**, **Object**, **Phase Code**, and **Activity Code**. Repeat steps 4 and 5 for any other funds (if it is simply Federal funding and state match, they should have the same coding). Click **Save**.
6. If the Program code/Project already exists on the Contract, you are finished.

\* If the funding being added is limited (capped at a certain dollar amount) enter that funding with a priority of 1 and the Amount Encumbered, as well as funds with a priority of 2 for any funding over that Amount Encumbered.

### *Adding a Project*

Contract Administration > Project Quick Link

1. From the Contract Project Overview, click the **Component Actions Menu** and press **Add**.
2. Populate the **Project ID** (with the Project Number), **Project Item List**, **Unit System** (English), **Project Description** (Project Name), and if applicable the **Federal Project Number** and **State Project Number** and click **Save**.
3. Select the **Categories** tab, press **New** and enter the **Category ID**, and the **Category Description** (the standard entry is 00BB and Basic Bid) and click the **Combine Like Categories** box, and click **Save**.
4. Click the **Regions** tab, enter the **Region ID**, click the **Primary** box, if applicable, and the **Maintenance District**, if known. Click **Save**.

## Next Steps:

Make sure to select the newly added Project and Fund package when adding the new item to the change order.