Change Orders - Creating and Submitting

BACKGROUND: In order to create a Change Order, the contract must have a Contract Type in the Contract Administration Summary and must be Active.

ROLES: Construction Office Engineer, Construction Project Engineer

NAVIGATION:

Construction > Contract Progress

1. From the Contract Progress Summary, select the **Change Orders** tab.
2. To add a Change Order, click the **Add** button.
3. In the General tab, enter the **Assigned Change Order Number**, **Summary of Changes(s)**, **Change Order Type**, **Author**, and **Reason**. Click **Save**.
4. Enter the Description and Reason For Change for the Change Order Backup in the **CO Backup Explanation** field. Click **Save**.
5. To enter the **Description of Change**, scroll down in the General tab and enter the **Order** and **Explanation**. The Description of Change will be the narrative displayed in the Description of Change section of the Change Order Report. Click **Save**.

Increase/Decrease Items

6. Click the **Select Items** button to open a modal window.
7. In the Select Items window, use the search bar and filters to find and select the contract project items that will have an increase or decrease to their quantity.
8. Click the **Add to Change Order** button at the bottom of the modal window.
9. Enter the **Quantity** and **Amount to Encumber** for each item.
    a. If you are deleting an item, the Quantity should be entered as the negative value of the item's Curr Qty. After the item is deleted, go to the *Contracts - Marking Contract Items Complete* QRG.
    b. The **Amount to Encumber** is used to determine the encumbrance amounts on the Change Order Backup report.
10. Click **Save**.

New Items

Note: After adding any new item to a Change Order, go to the *Agency Views - Adding for Contract Items* QRG.

New Items

11. Click the **Select New Item** button to open a modal window.
12. 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.
13. Click the **Add to Change Order** button at the bottom of the modal window.
14. Enter the **Quantity**, **Funding**, **Unit Price**, **Amount to Encumber** (optional), **Supplemental Description** (optional), and **Contractor** for the new item. If the new item requires new Funding on the Contract, refer to the *Contracts - Funding* QRG.
    a. The **Amount to Encumber** is used to determine the encumbrance amounts on the Change Order Backup report.
15. Click **Save**.

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

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

Time Adjustments

20. Click the **Select Contract Time** button to open a modal window.
21. In the Select Contract Time window, use the search bar and filters to find and select the contract time that will be adjusted.
22. Click the **Add Time Adjustments to Change Order** button at the bottom of the modal window.
23. Enter the **Adjusted Completion Date** or **Adjusted Time Unit** for the contract time. Click **Save**.

Contract Claims

24. Click the **Select Contract Claim** button to open a modal window.
25. In the Select Contract Claim window, use the search bar and filters to find and select the contract claim that this change order addresses.
26. Click the **Add to Change Order** button at the bottom of the modal window.
27. Click **Save**.

Force Accounts (If using Review Tracking, must be done prior to adding Reviewers)

28. Click the **Select Force Accounts** button to open a modal window.
29. In the Select Force Accounts window, use the search bar and filters to find and select the force account that this change order addresses.
30. Click the **Add to Change Order** button at the bottom of the modal window.
31. Click **Save**.

Review Tracking (This will allow the selected Reviewers to review your change order)

32. Click the **Select Reviewers** button to open a modal window.
33. In the Select Reviewers window, use the search bar and filters to find and select the users that will review this change order.
34. Click the **Save** button at the bottom of the modal window. The system will change the Status of your Change Order to Pending Review.

Approval Tracking

35. After submitting the change order for approval, the system will display the Approval Groups necessary to approve this change order based on the Change Order Type, Contract Type, and Change Order Amount.

Submitting Change Order

1. 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.
2. On the Contract Change Order Summary, click the **Component Actions Menu** in the upper right corner.
3. In the Tasks section, select **Submit For Approval**. The system will change the Status of your Change Order to Pending Approval.