Texas Department of Transportation

Working With Change Orders

BOOKPR, PROJMGR, AREAENRG, CONENGR

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Managing Change Orders

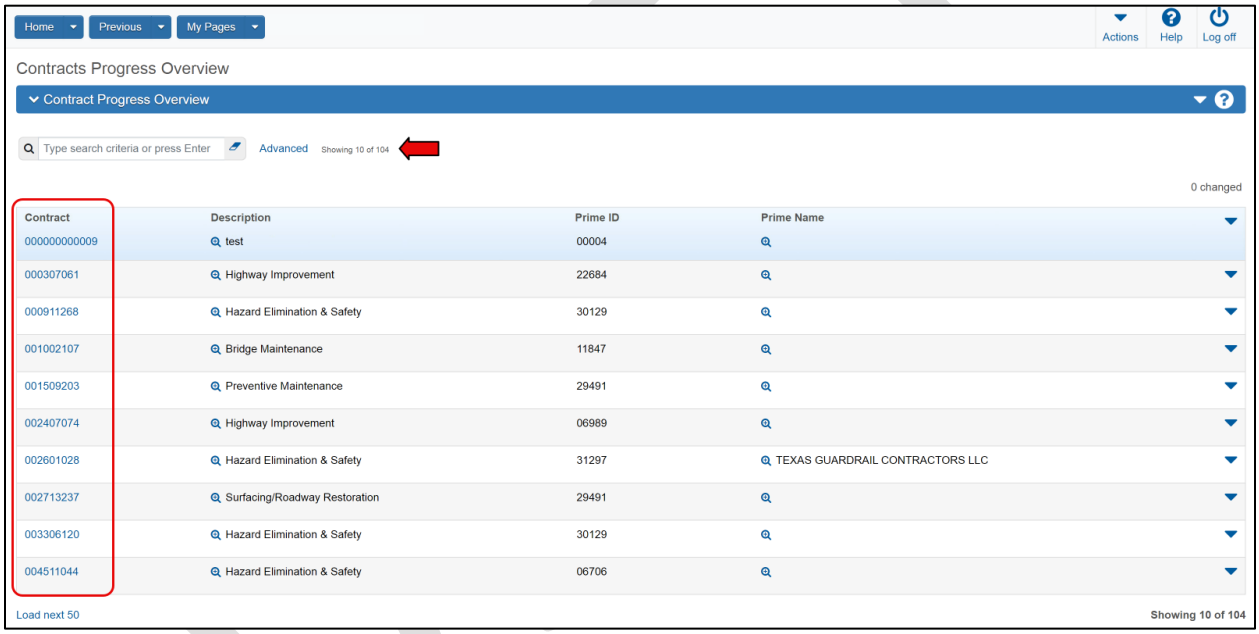
Background

A change order allows you to legally change a signed contract. The Change Orders tab on the Contract Progress Summary provides access to all the change orders that have been created for the contract.

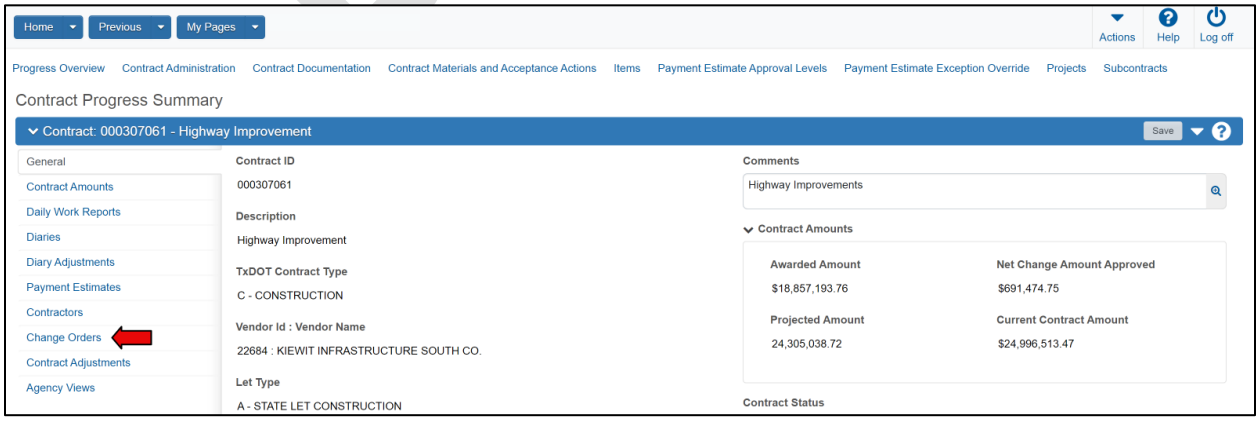
Adding a Change Order to a Contract

Navigation: Construction > Contract Progress

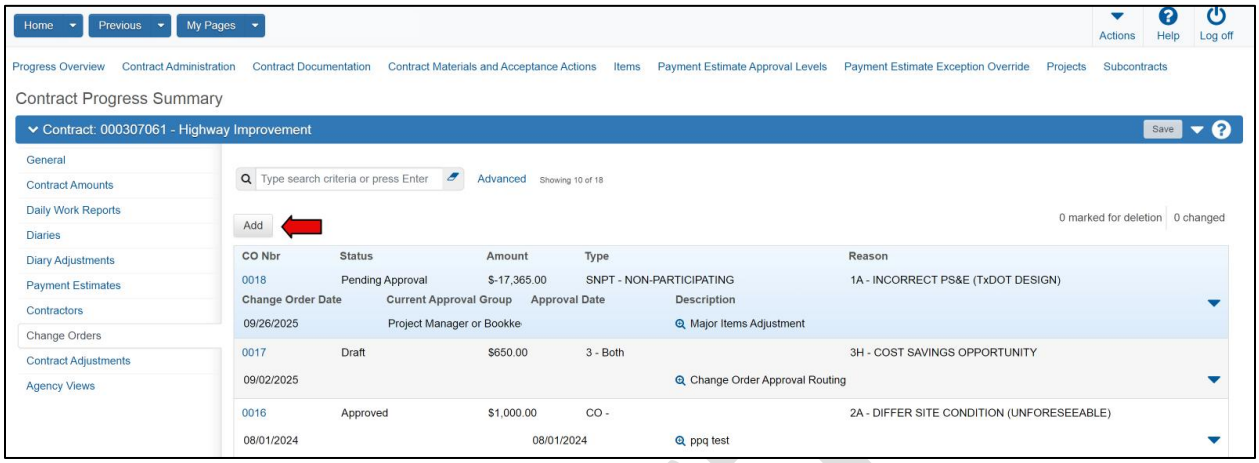
1. Select **Contract ID** via list or search.



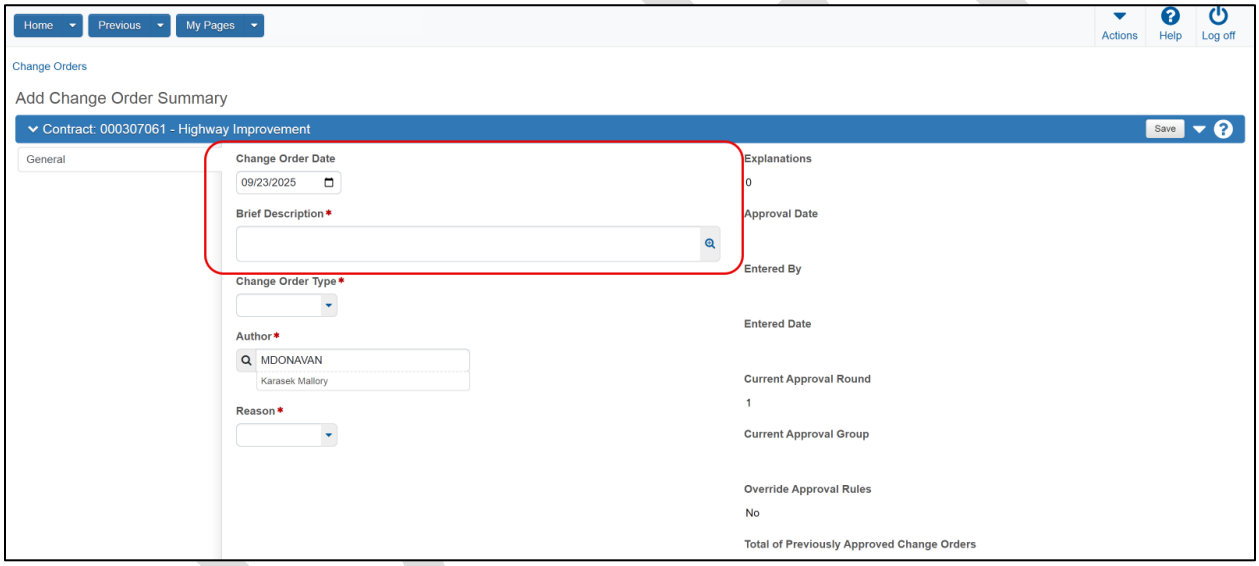
2. From the Contract Progress Summary, click the **Change Orders** tab.



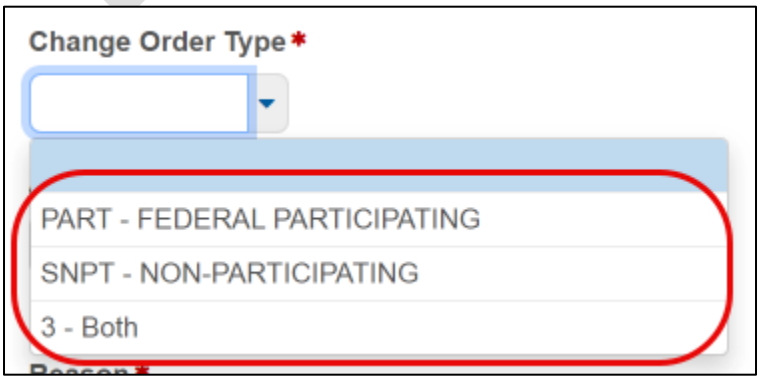
3. Click the **Add** button.



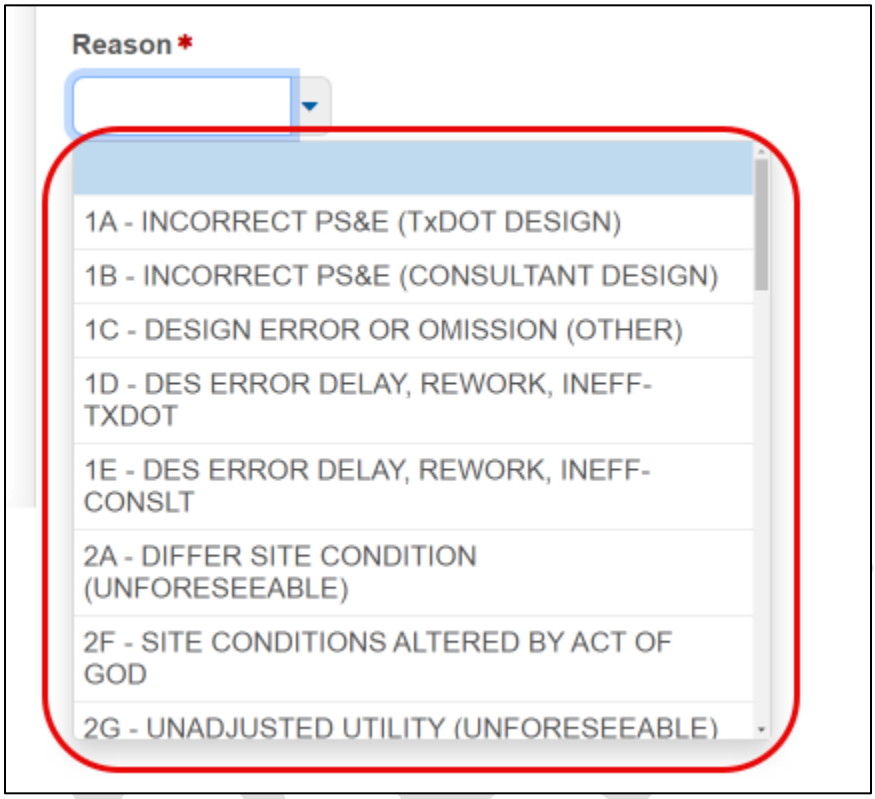
4. In the **Change Order Date** field, enter the change order date.
5. In the **Brief Description** field, enter the description up to 100 characters.



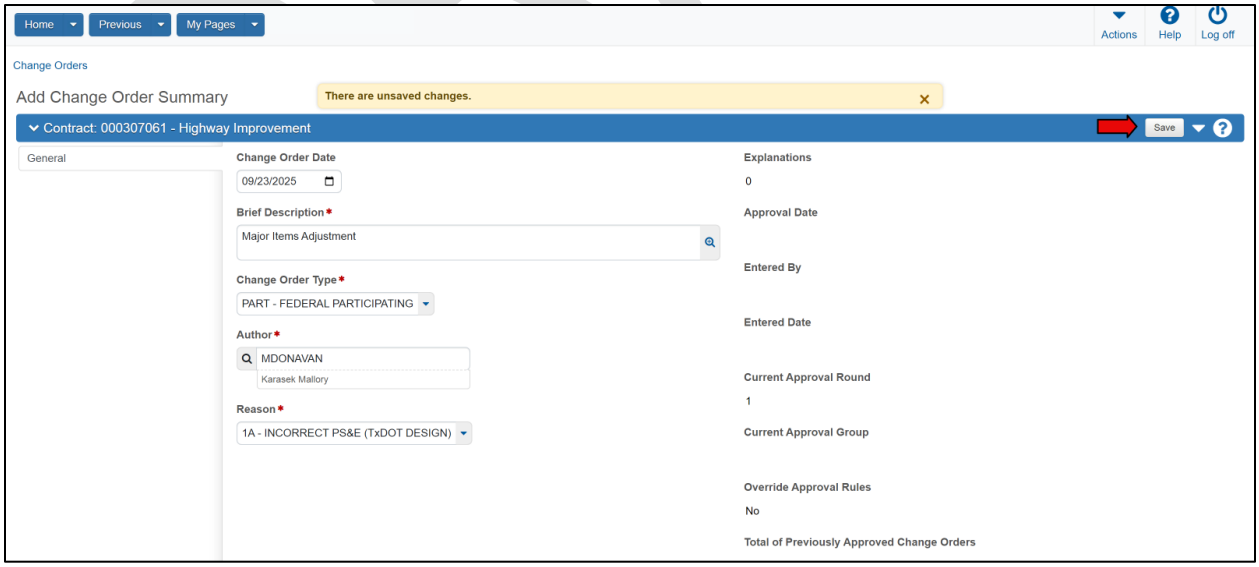
6. In the **Change Order Type** field, click the drop-down arrow and select the classification for the change order.



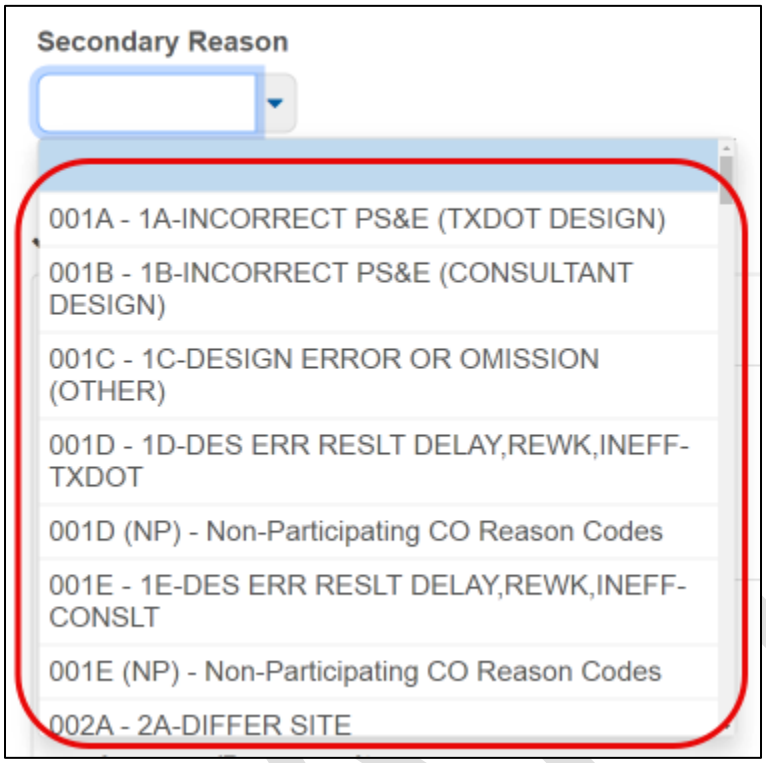
7. In the **Author** field, the user ID of the logged in user will populate automatically.
8. In the **Reason** field, click the drop-down arrow and select the value that indicates the general reason for the change order.



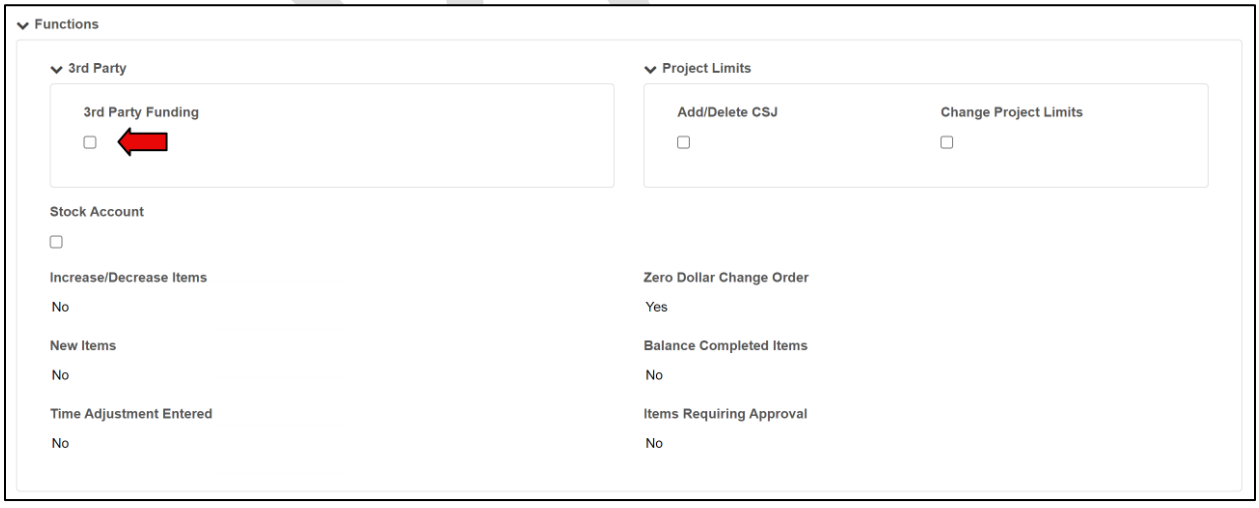
9. Click the **Save** button.



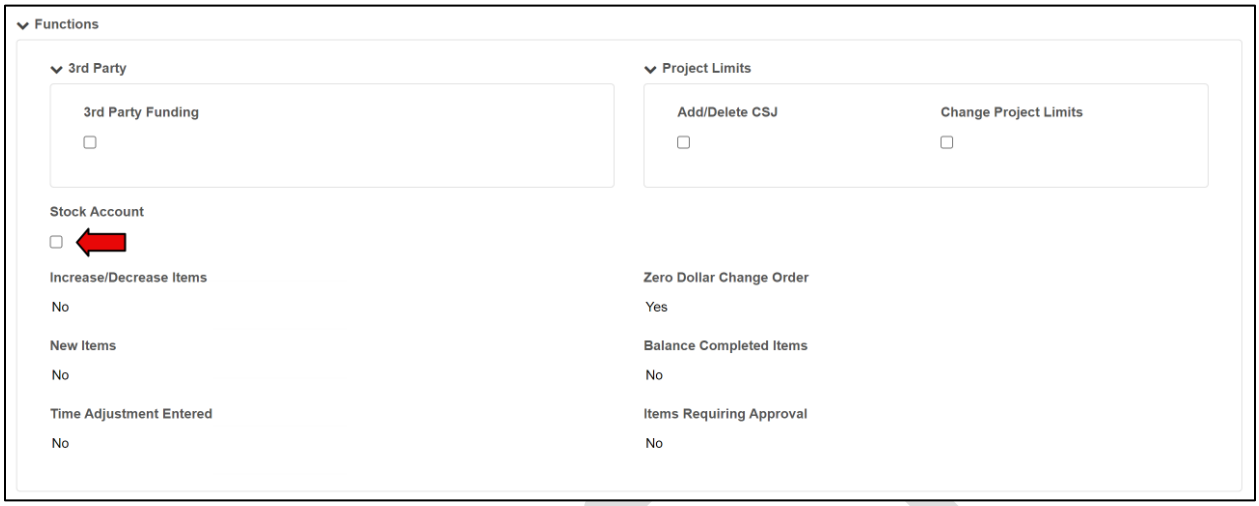
10. View the **Secondary Reasons** field.



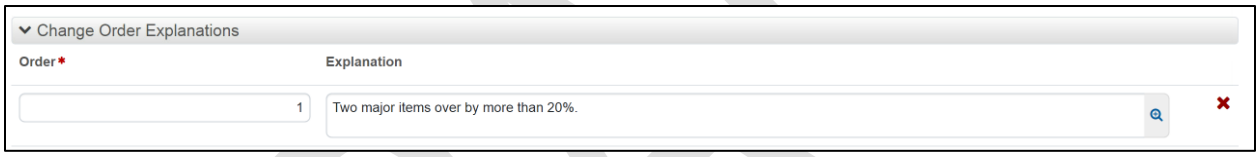
11. View the **3rd Party** check box.
    - **Note:** Only Select if Change Order has 3rd party funding.



12. View the **Stock Account** field.
    - **Note:** Only select if Change Order is for a Stock Account.



13. Under the Change Order Explanations section, click the **Order** field, enter 1.
14. In the **Explanation** field, enter the explanation information up to 32,000 characters.

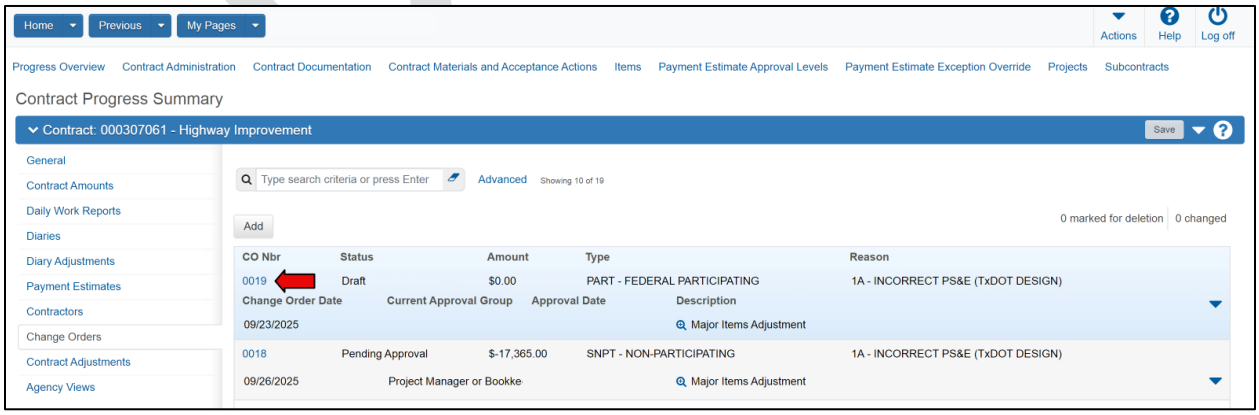


15. Click the **Save** button.

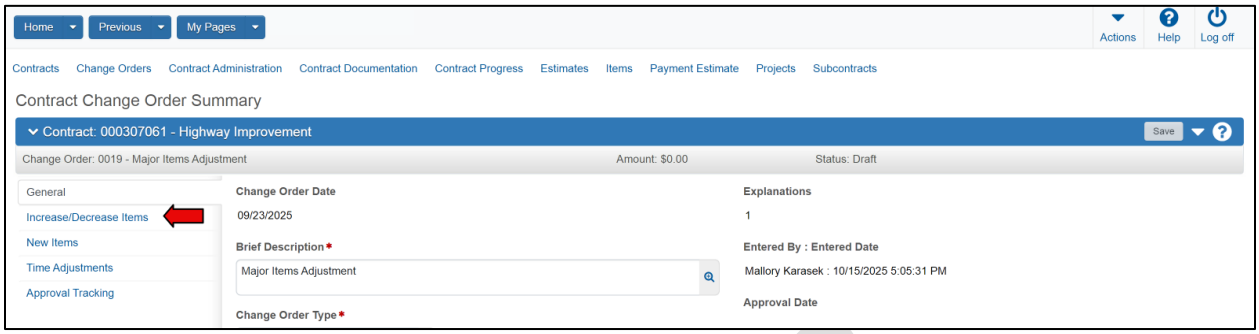
Increasing or Decreasing Items with a Change Order

Navigation: Construction > Change Order **OR** Construction > Contract Progress > Change Order tab

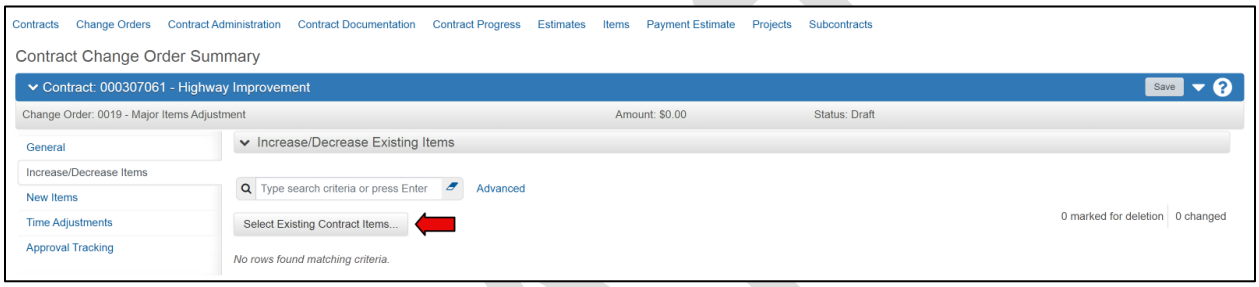
1. Click the **Change Order Number** link.



2. Click on the **Increase/Decrease Items** tab.

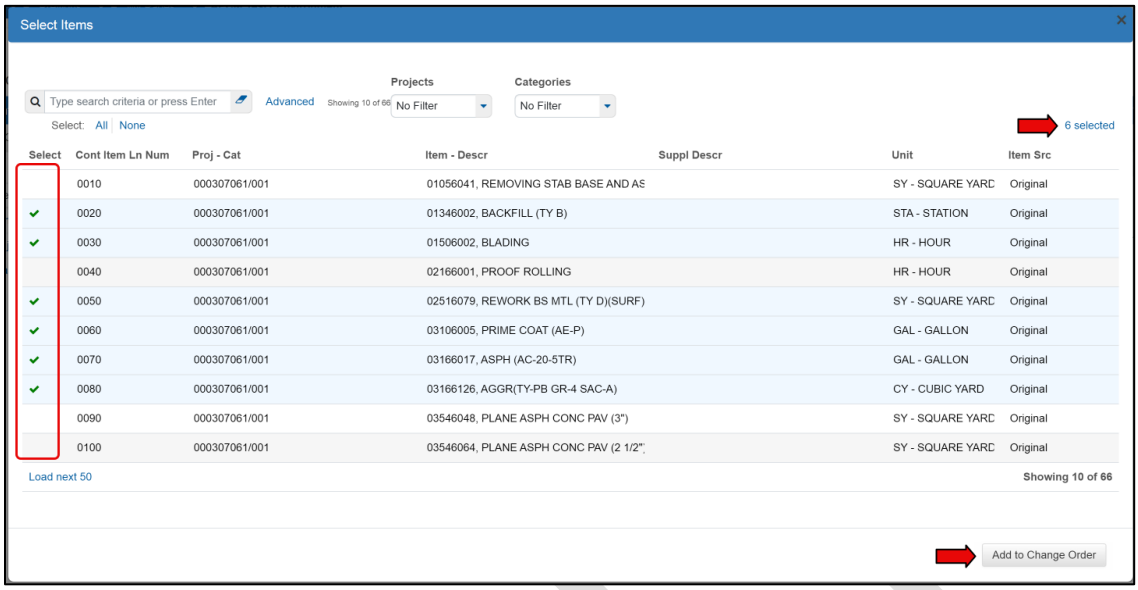


3. Click the **Select Existing Contract Items** button.

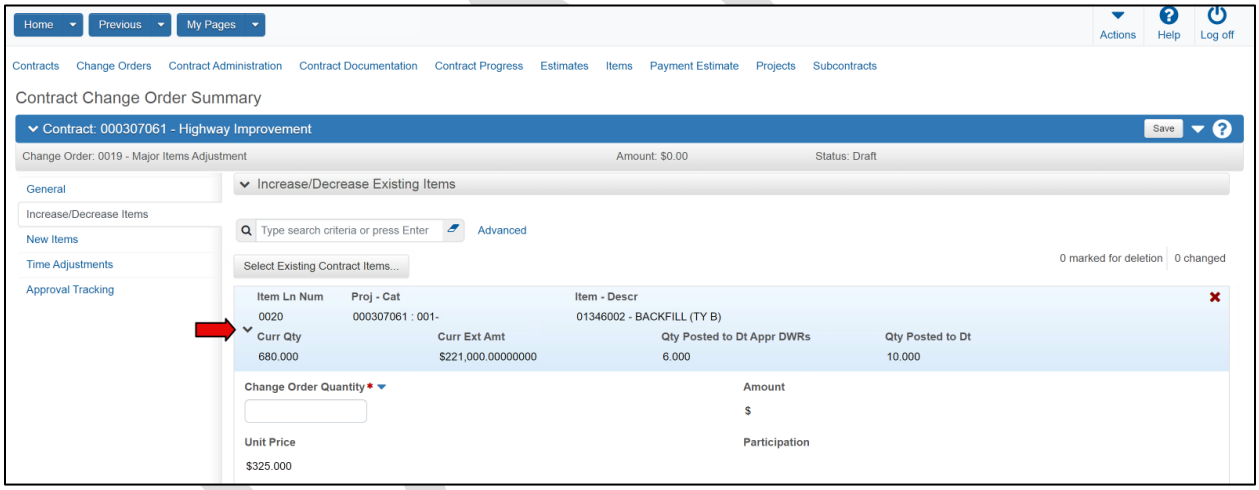


4. Search for or click on the **Show first 10** link and select the item(s) to change.

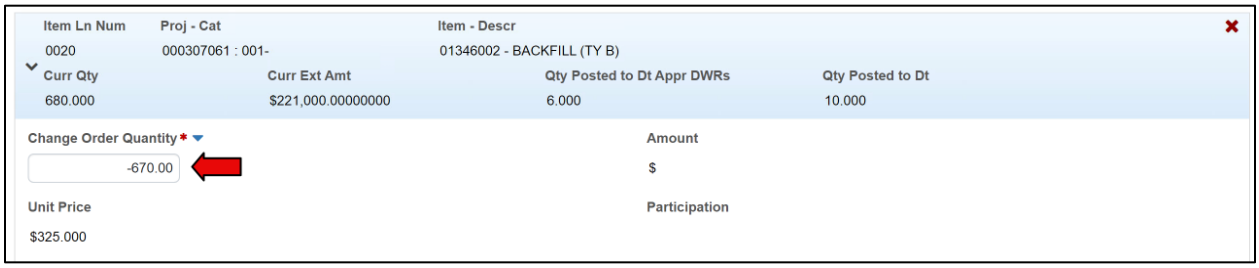
5. Click the **Add to Change Order** button.



6. Click the arrow to expand the row.



7. In the **Change Order Quantity** field, enter the change to the approved quantity for the contract project item.
    - **Note:** If decreasing the item value, ensure to put the "-" before the quantity.

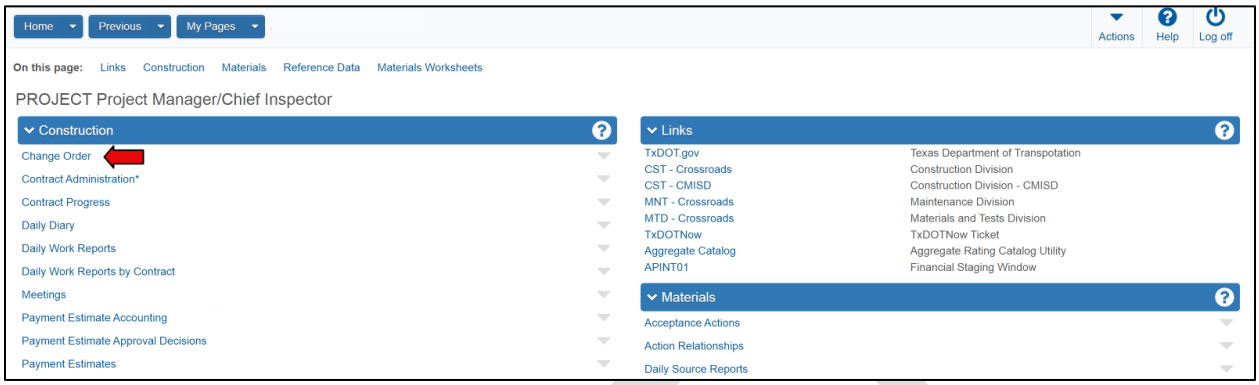


8. Click the **Save** button.

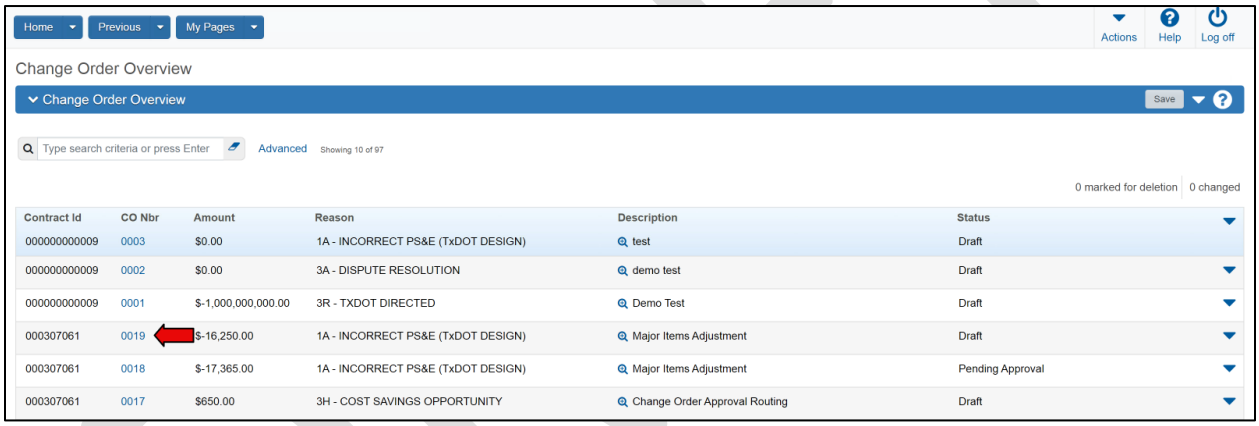
Adding New Items with a Change Order

Navigation: Construction > Change Order **OR** Construction > Contract Progress > Change Order tab

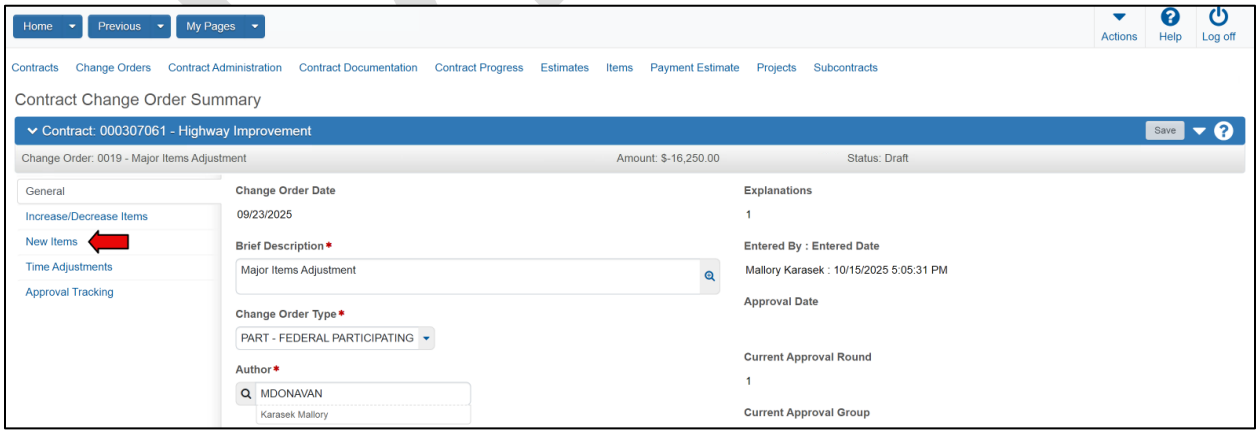
1. From the **Construction** component, select the **Change Order** link.



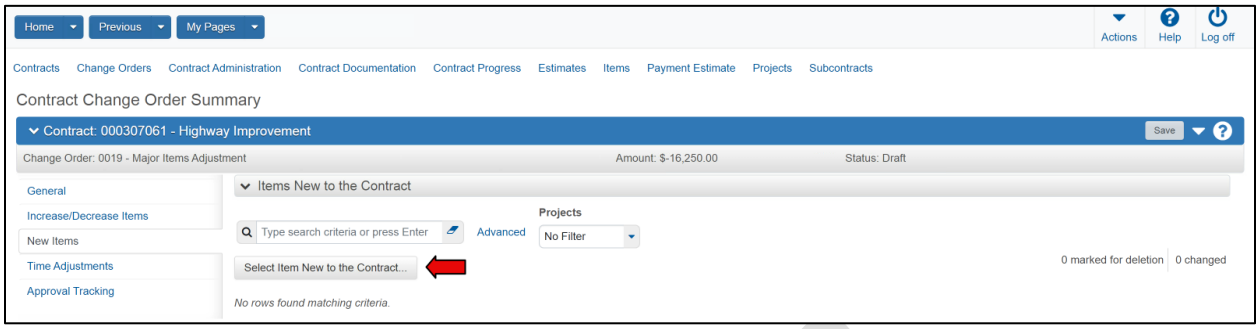
2. Click the **Change Order Number** link.



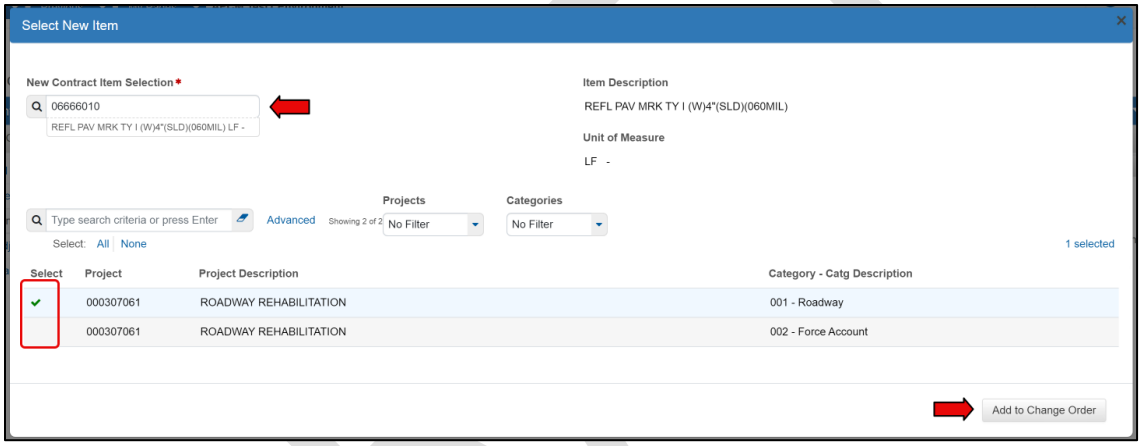
3. Click on the **New Items** tab.



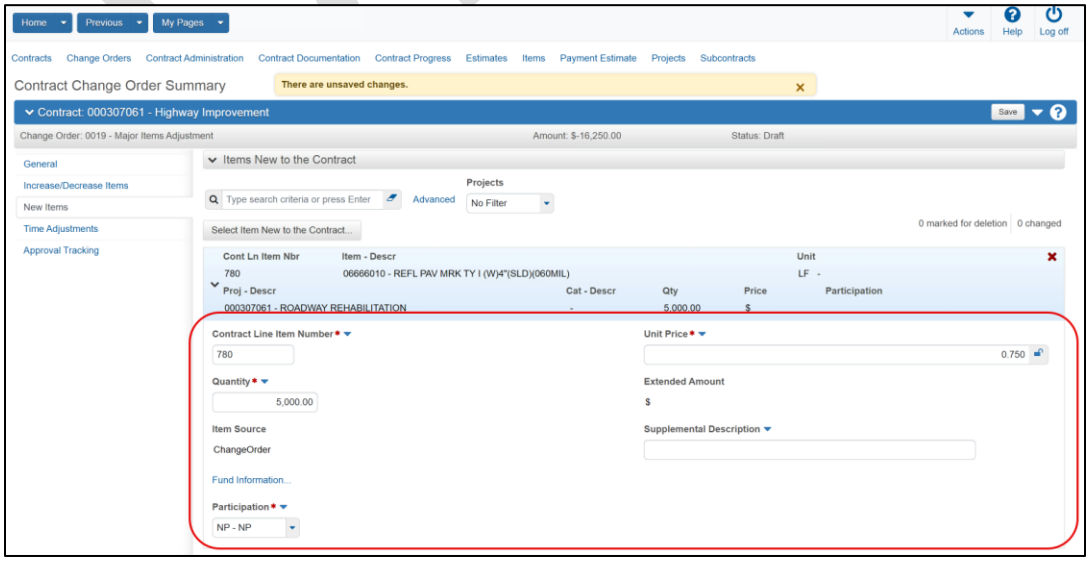
4. In the New Items section, click the **Select New Item** button.



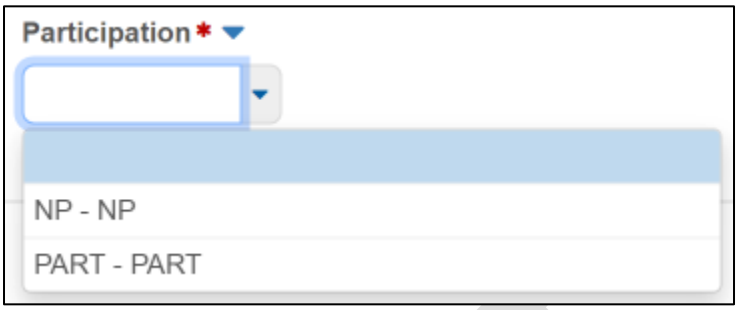
5. In the **Item** field, search for and select the item to add to the change order.
6. Click the row for the project/category to which the item will be added.
7. Click the **Add to Change Order** button.



8. In the **Contract Item Line Number** field, verify or modify the contact item line number. The system will populate this with then next incremental Contract Item Number.
9. In the **Quantity** field, enter the number of units of the item that are required.



10. Click the **Fund Information** button to view fund information associated with all Fund Packages on the contract.
11. In the **Participation** field, select whether the item is participating or not.

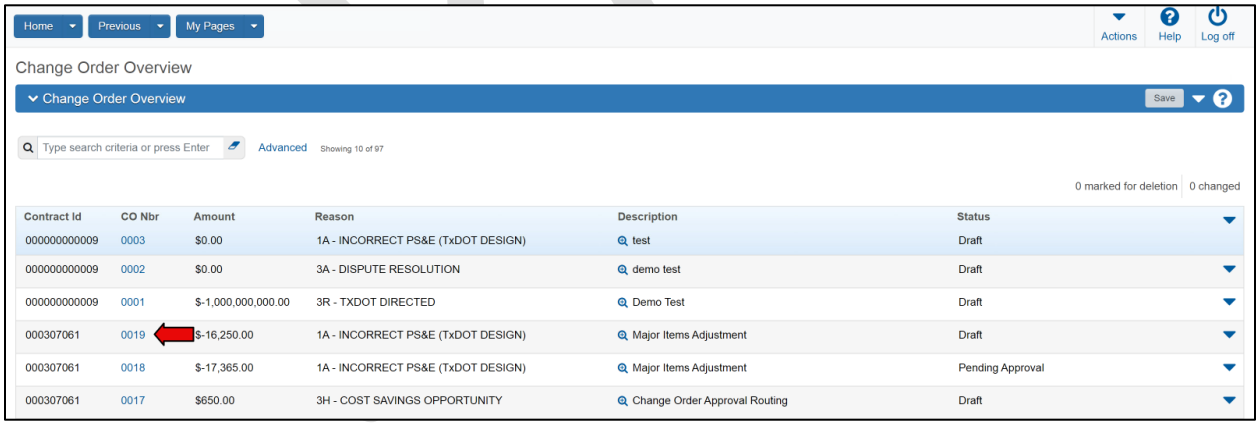


12. In the **Unit Price** field, enter the unit price for the item at the contract project level.
13. The **Extended Amount** field shows the extended amount for the new item on the change order once the New Item has been saved.
14. In the **Supp Description** field, enter the change order explanation supplemental description.
15. Click the **Save** button.

Adjusting a Contract Time with a Change Order

Navigation: Construction > Change Order **OR** Construction > Contract Progress > Change Order tab

1. Click the **Change Order Number** link.



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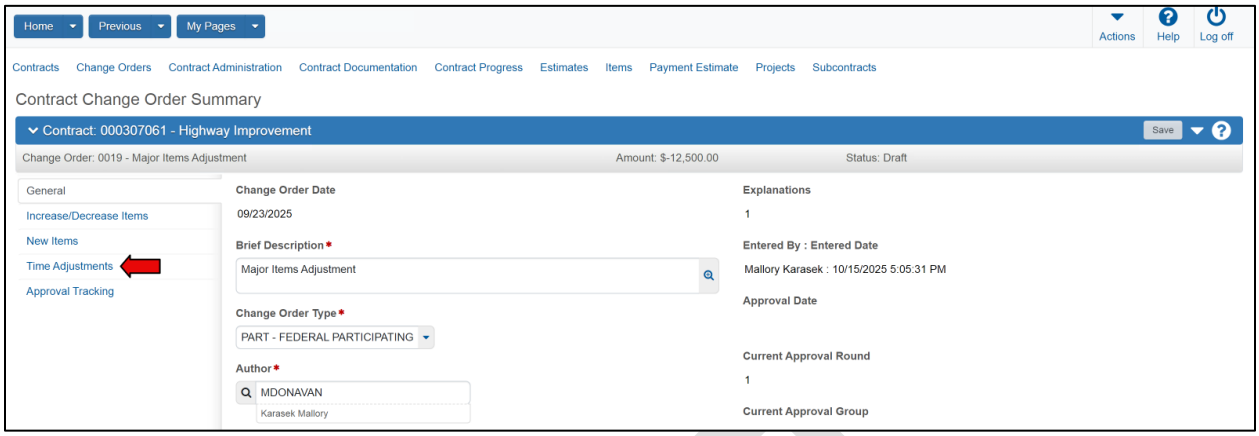
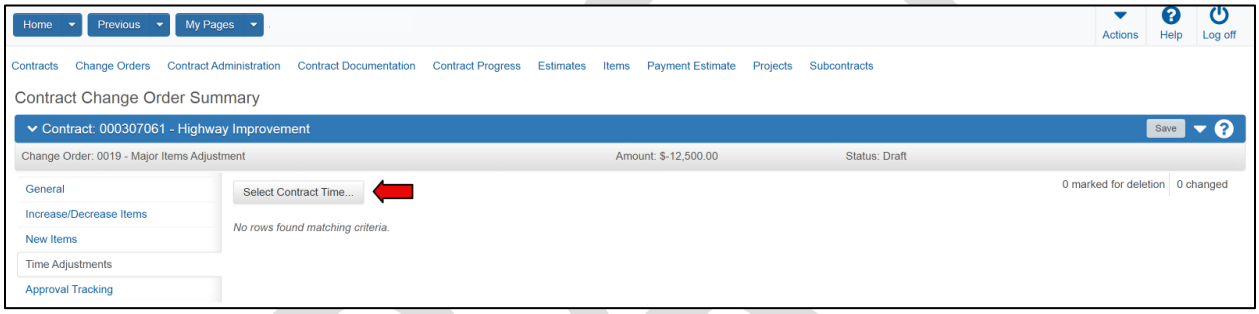
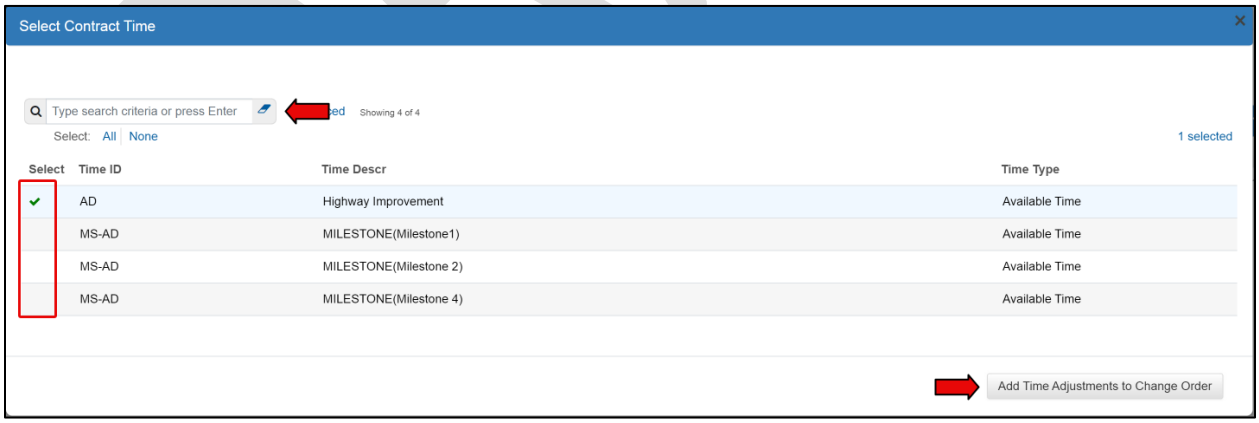
2. Click on the **Time Adjustments** tab.



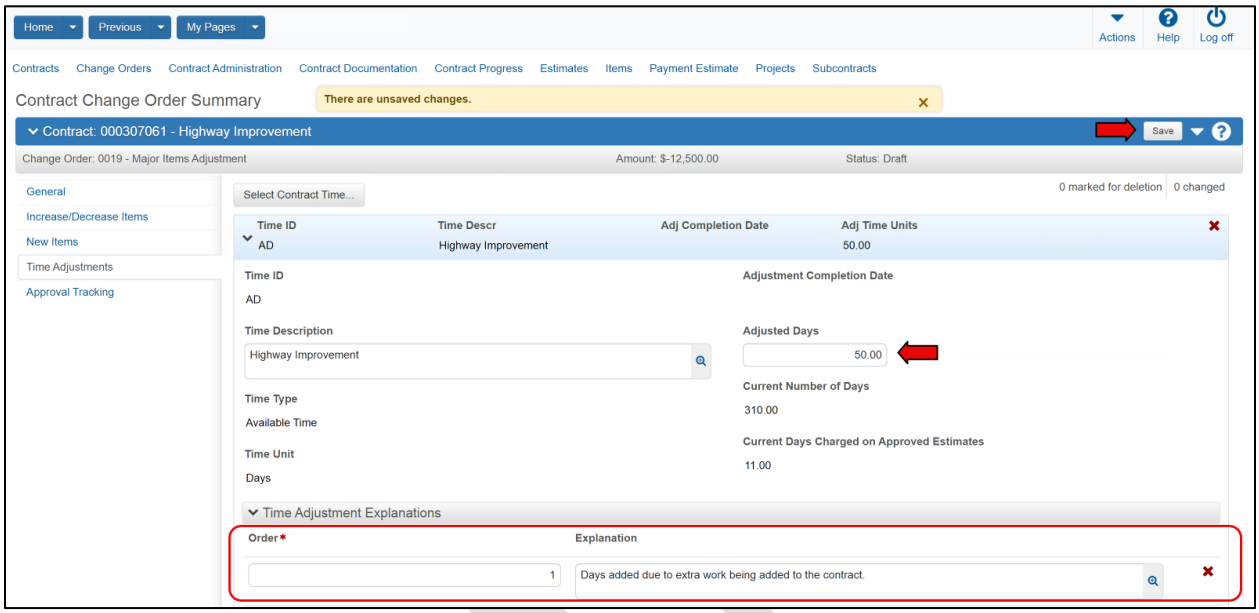
3. Click the **Select Contract Time** button.



4. Click on the desired Contract Site Times to adjust the Time Units.
5. Click the **Add Time Adjustment to the Change Order** button.



6. In the **Adjustment Days** field, enter the adjustment amount
7. In the **Order** field, enter the order number. In the **Explanation** field, enter the explanations.
8. Click the **Save** button.

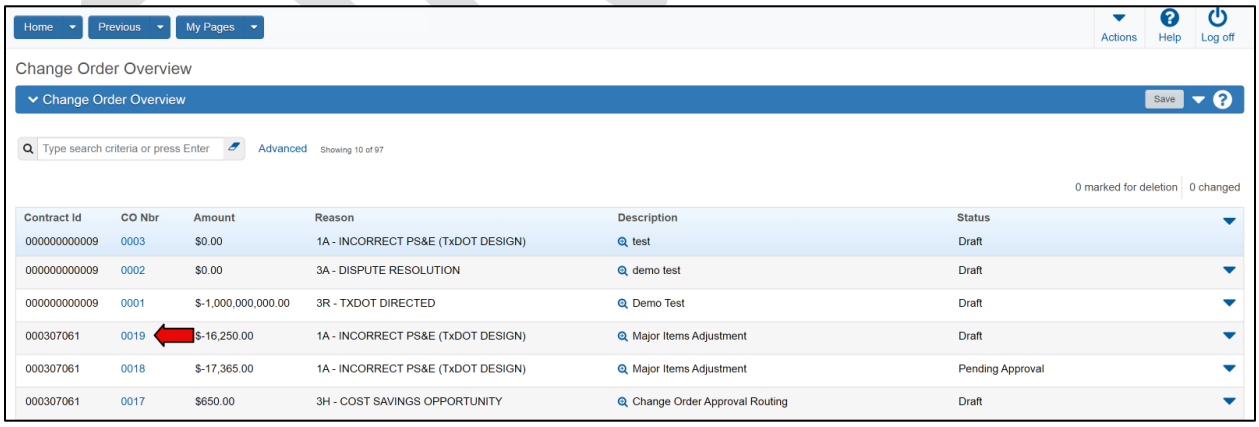


Setting Change Order Approval Levels (if applicable)

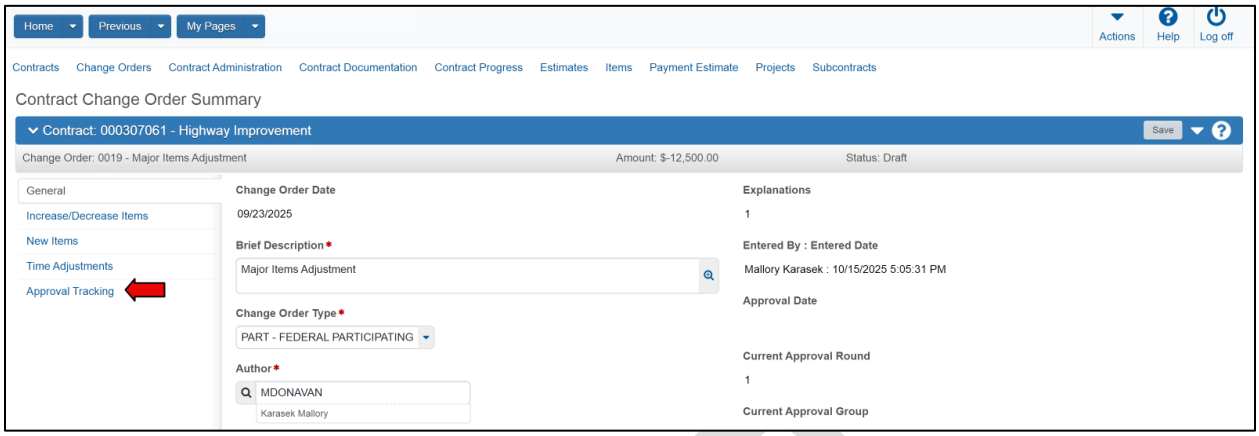
Navigation: Construction > Change Order **OR** Construction > Contract Progress > Change Order tab

Option 1: Add Approval Group Button

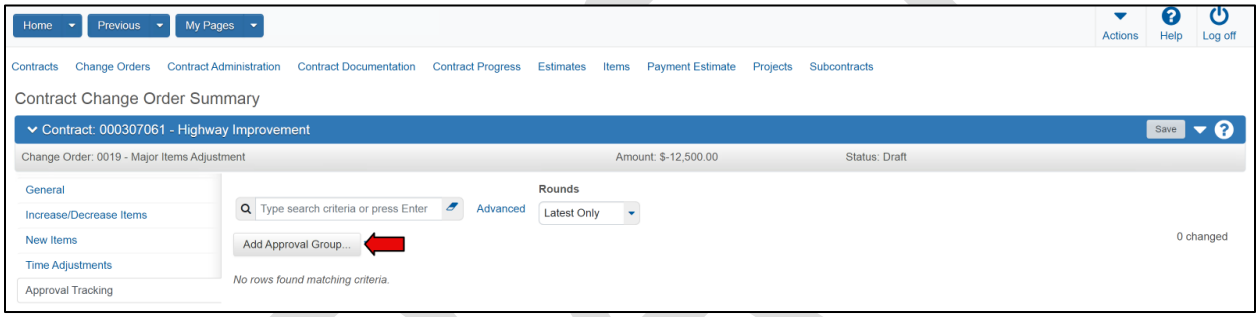
1. Click the **Change Order Number** link.



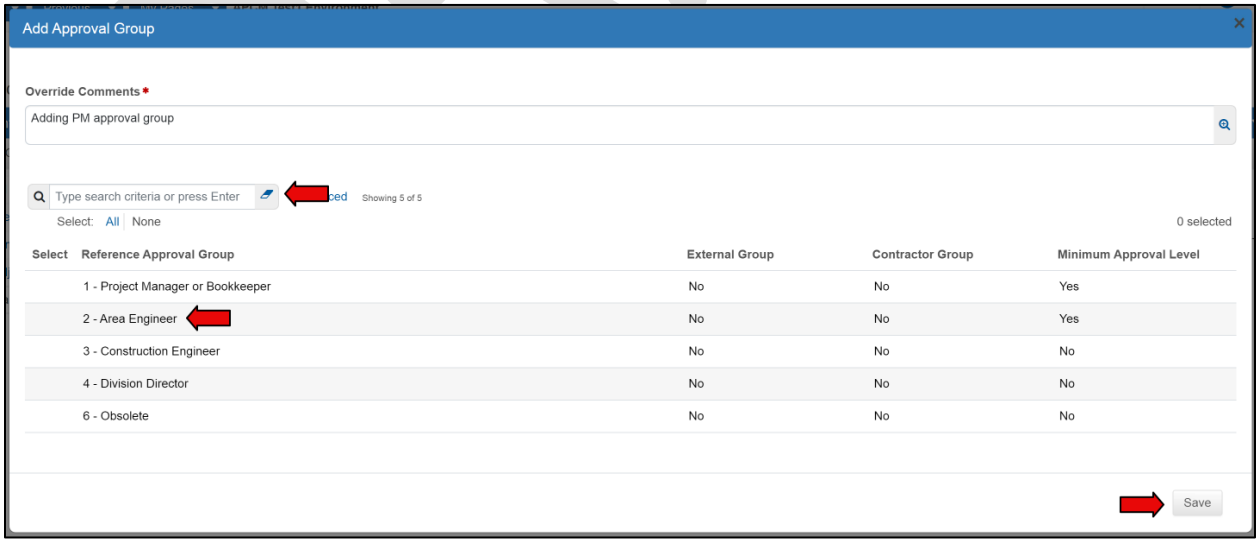
2. From the Change Order Summary page, the **Approval Tracking** tab.



3. Click the **Add Approval Group** button.

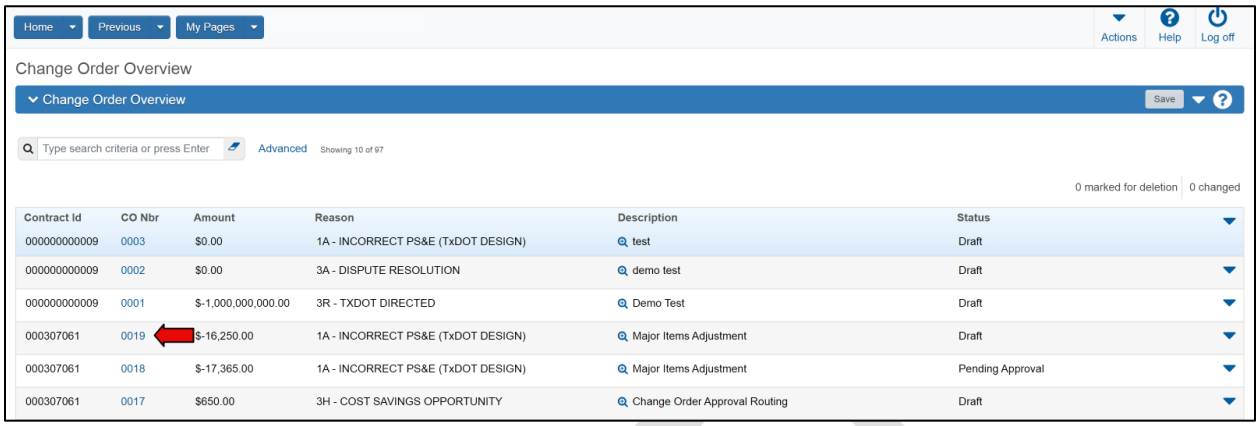


4. Search and select group for approval.
5. Click the **Save** button.

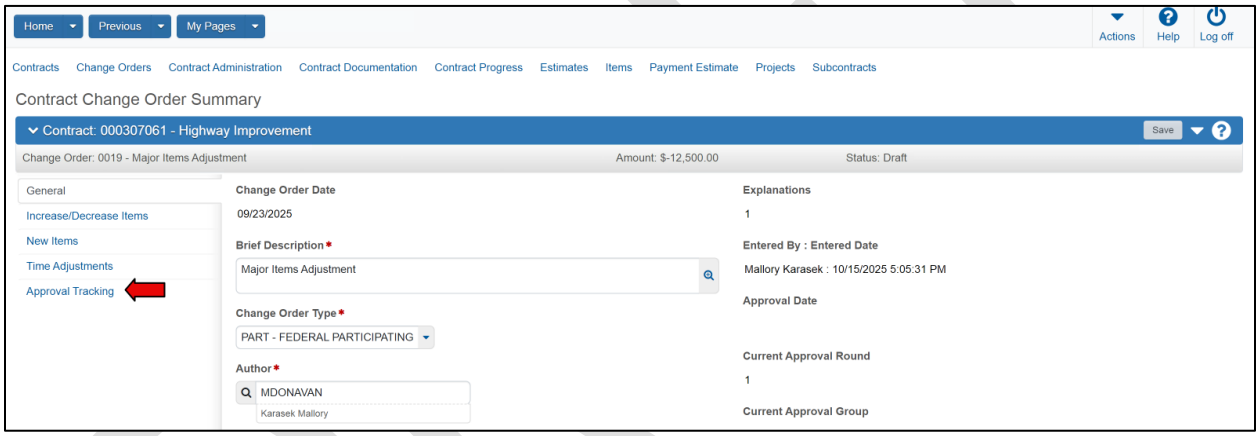


Option 2: Add Approval Group Row Actions Menu

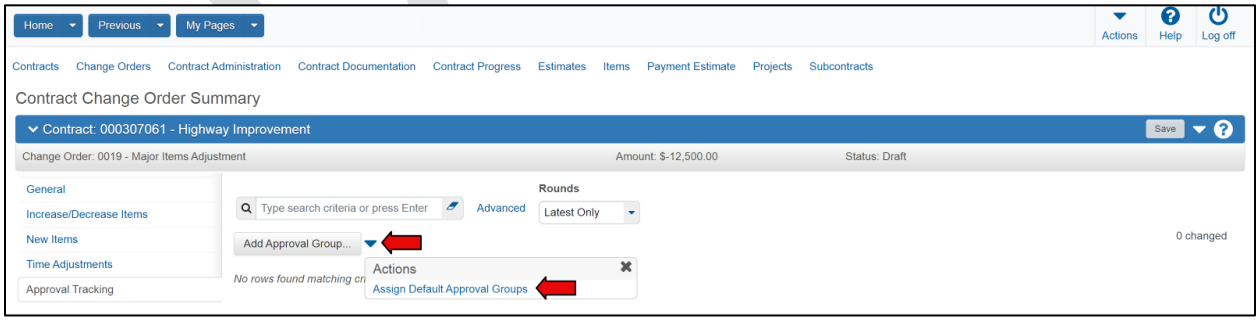
1. Click the **Change Order Number** link.



2. From the Change Order Summary page, the **Approval Tracking** tab.



3. Click the **Add Approval Group** row **Actions** menu and select **Assign Default Approval Groups**.



Approving Change Orders

Background

A change order allows you to legally change a signed contract. The Change Orders tab on the Contract Progress Summary provides access to all the change orders that have been created for the contract.

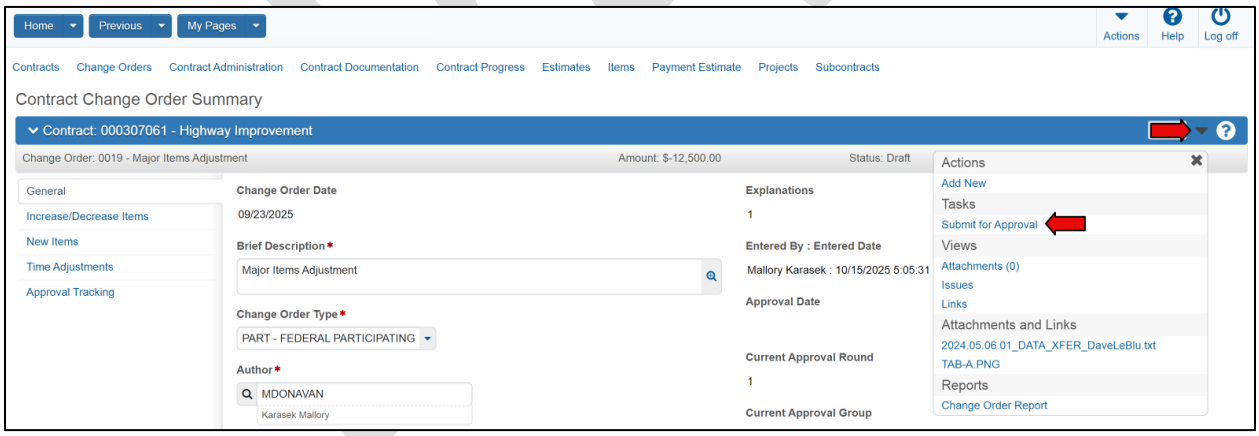
The Default Change Order Approval Levels will be determined by the Change Order creator:

- Level 1: Project Manager or Bookkeepers (Required)
- Level 2: Area Engineer (Required)
- Level 3: Construction Engineer (as applicable)
- Level 4: District Engineer (as applicable)
- Level 5: Division Director (as applicable)

Submitting a Change Order for Approval

Navigation: Construction > Change Order > Change Order Summary

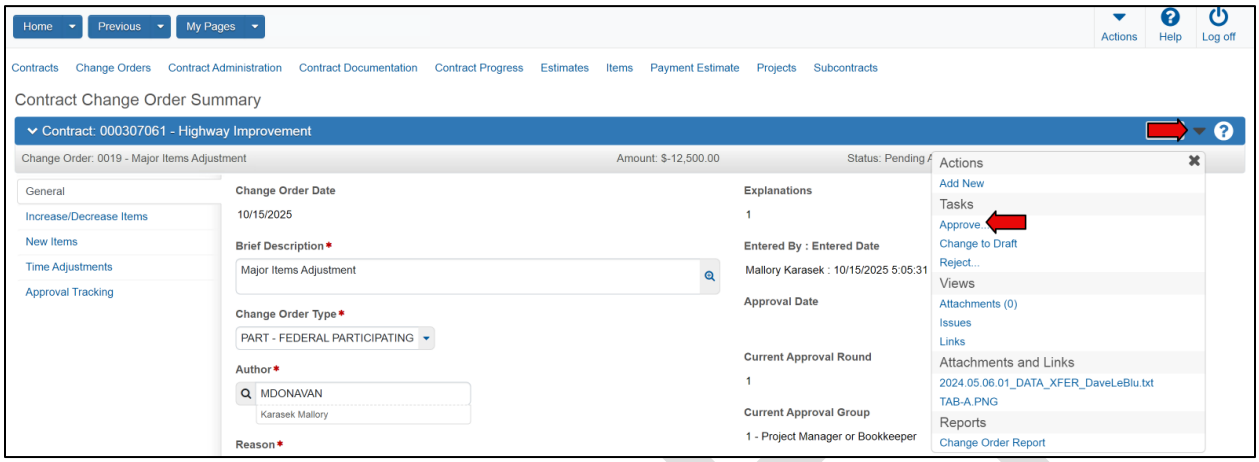
1. On the Contract Change Order Summary for the appropriate change order, click the component **Actions** menu.
2. Select the **Submit for Approval** task.



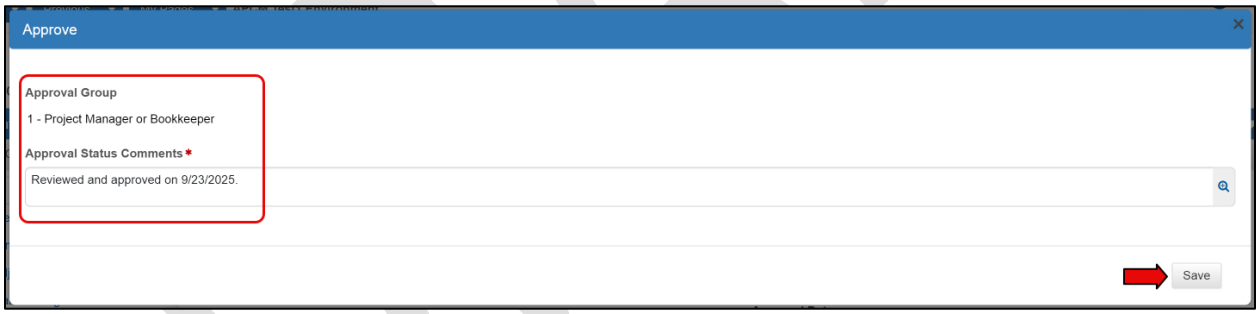
Approving a Change Order

Navigation: Construction > Change Order > Change Order Summary

1. From the Change Order Summary page, click the component **Actions** menu and select the **Approve** action.



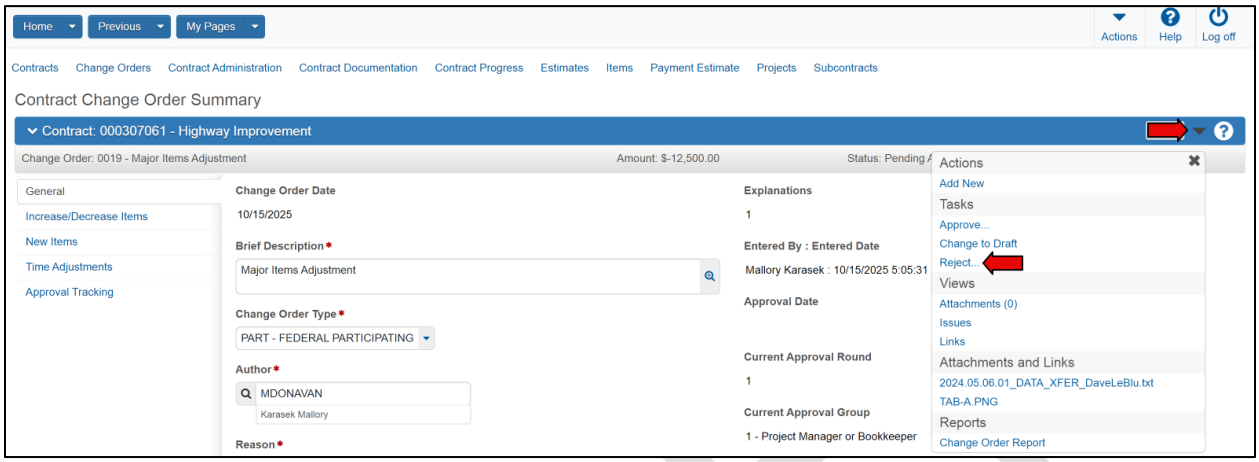
2. In the **Approval Decision Comments** field, enter a comment about the decision to approve the change order up to 250 characters.
3. Click the **Save** button.



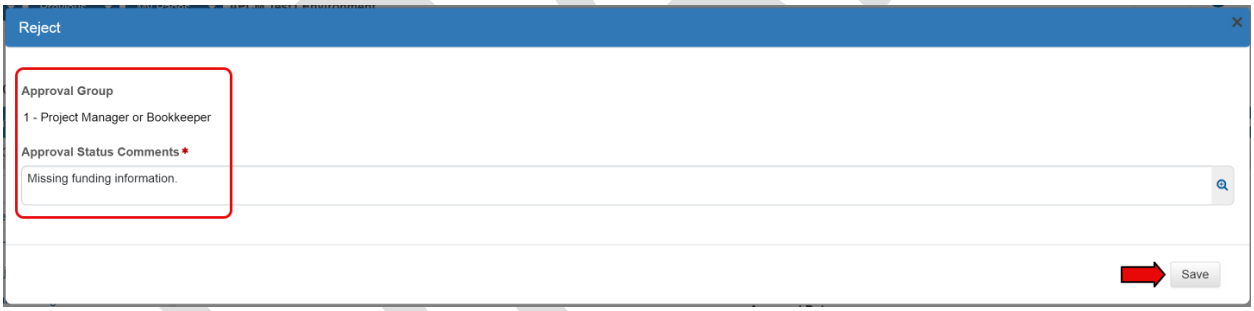
Rejecting a Change Order

Navigation: Construction > Change Order > Change Order Summary

1. From the Change Order Summary page, click the component **Actions** menu and select the **Reject** action.



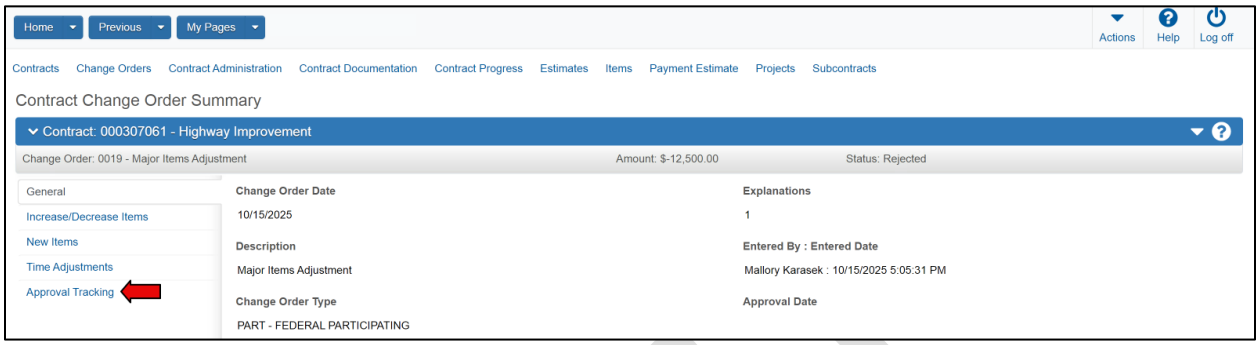
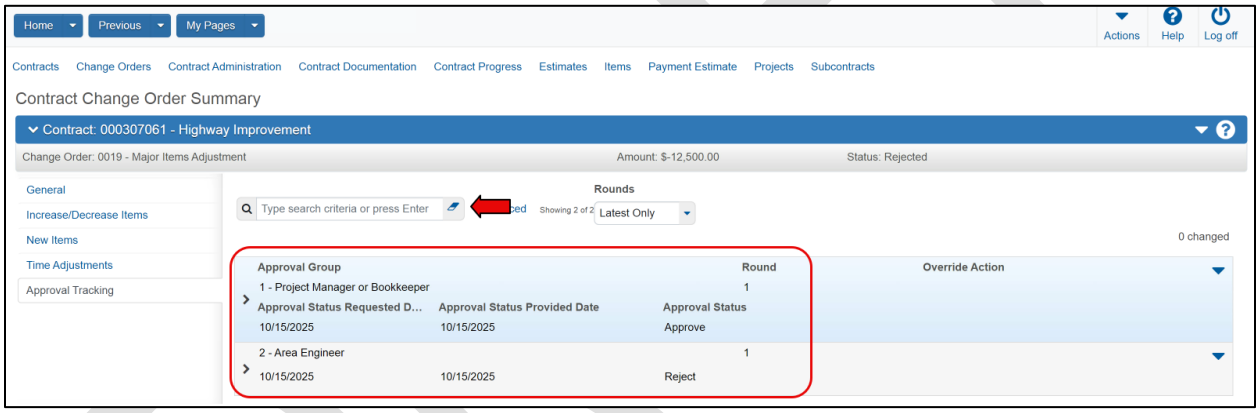
2. In the **Approval Decision Comments** field, enter a comment about the decision to reject the change order up to 250 characters.
3. Click the **Save** button.



Tracking Approvals for a Change Order

Navigation: Construction > Change Order > Change Order Summary

1. From the Change Order Summary page, click the **Approval Tracking** tab.



2. From here, you can view the current approval level and status of the change order by pressing Enter in the search bar.