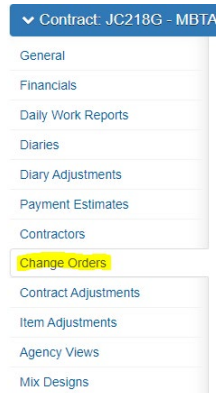




## Change Orders

*AASHTOWARE -> DASHBOARD -> CONTRACT PROGRESS -> CONTRCT NUMBER -> CHANGE ORDERS TAB*

- From the Home Dashboard, select the Contract Progress Hyperlink.
- Enter the contract number the change order will apply to in the search box.
- Select the contract hyperlink.
- When the contract Progress overview loads, select the Change Orders Tab on the right-hand side of the screen.



- Click on the gray **Add** button.
- Note: As you add change orders, they will automatically be numbered.

### ***The General Tab***

- The general tab is used for the basis of the change order. This is the first page of a Change Order Report.
- When the screen loads, you will notice the General Tab is only available. Once the required information, noted with the **\***, has been entered and **SAVED** the other tabs will open up.

General

**Change Order Date**  
01/21/2021

**Description \***

**Approval Rules \***

PoDI (FHWA)

**Author \***  
SowiejaJ  
Sowieja Jennifer

**Explanations**  
0

**Change Order Revision Number**

**Approval Date**

**Entered By**

**Entered Date**

**Current Approval Round**

- Enter a Description of the Change order.

**Description \***

Overrun of CAC material at station 10+00 to 15+00 LT.

- For the Approval Rules, you will need to designate if this an ADMIN, a regular Change order or an Oversight Contract (PoDI)

**Approval Rules \***

CO - Change Order

ADMIN - Administrative Change Order

CO - Change Order

CO-P - Change Order - PoDI

- The author will automatically be filled in with the person who is writing the change order.

**Author \***

SowiejaJ  
Sowieja Jennifer

- Add a reason of why the change order is being created.

**Reason**

AR - Accounts Receivable

AS - Administrative Settlement

CHG - Change Condition

DM - Design Modification

E&O - Errors and Omission

ENV - Environmental

EW - Extra Work

QTY - Quantity

SP - Specification Change

TA - Time Adjustment

- Once you have filled in the required information, click on the SAVE button on the component action ribbon.
- After the save, there will be more information that shows on the General Tab and the other tabs have opened up also.

General	<b>Functions</b>		
Increase/Decrease Items	Increase/Decrease Items	Contract Modification Only	
New Items	No	Yes	
Time Adjustments	New Items	Balance Completed Items	
Contract Claims	No	No	
Review Tracking	Time Adjustments	Items Requiring Approval	
Approval Tracking	No	No	
Force Accounts	<b>Change Order Explanations</b>		
Plan Discrepancies	Seq Nbr*	Standard Explanation Name	Standard Explanation Description
Change Order Item Explanations	<input type="text"/>	<input type="text" value="Begin typing to search or press Enter"/>	<input type="text"/>

- You will notice on the bottom of the screen; Change Order Explanations has opened up. You can enter your explanations here or under the Change Order Item Explanations Tab.
- You can enter more than 1 explanation depending on your needs of the change order.
- The sequence number will start with 1.
- In the Standard explanation box, you can place your cursor and hit the Enter Key. This will open a drop-down box where you can choose your explanations from the list.
- You can add extra comments to the explanations for more specific information.

Seq Nbr*	Standard Explanation Name	Standard Explanation Description	Gen/Supp Explanation
<input type="text" value="1"/>	<input type="text" value="Unsuitable Matl"/> <small>EX - Extra Work</small>	Remove and dispose of unsuitable material :	Over saturated material was found at STA 10+00 to 15+00 LT that needed to be removed. <input type="text"/>
<input type="text" value="2"/>	<input type="text" value="Time for Misc Work"/> <small>TA - Time Adjustment</small>	Contract time is added for additional work nc	Agreed with Contractor for 4 days of Time to be added. <input type="text"/>

- Once you have added your explanations, click on the SAVE button.

**Increase/Decrease Items Tab**

- This tab is used to enter an increase of a specific pay item or a decrease of a pay item with the agreement between the Contractor and EPM to use contract pricing.
- Click on the Select Items button.

- Move your cursor to the search box and hit the Enter Key. This will open the contract items to be chosen.
- Select the contract items that are to be added or decreased from the contract and select the Add to Change Order Button.
- You can add multiple line items that apply to the change order, if applicable.
- If you are decreasing a contract line item quantity, you will represent it with a negative number. If you are increasing a contract line item, it will be represented with a positive number.

0080	5157010000I - 0001	203020100 - EXCAVATION-UNCLASSIFIED	0.000		✘
>	38,591.000	167,870.85	0.000	0.000	
0160	5157010000I - 0001	301020340 - CRUSHED AGGREGATE COURSE	0.000		✘
>	12,604.000	327,704.00	0.000	0.000	
0760	5157010000I - 0001	622011084 - GEOTEXTILE STABILIZATION	0.000		✘
>	1,968.000	3,936.00	0.000	0.000	
<b>Proj Ln N...</b>	<b>Proj - Cat</b>	<b>Item - Descr</b>	<b>Pending CO Qty</b>	<b>Pend CO Ext Amt</b>	✘
>	0140	9028052000I - 0001	618030005 - TRAFFIC CONTROL DEVICES CB	0.000	
	<b>Curr Qty</b>	<b>Curr Ext Amt</b>	<b>Qty Posted to Dt Appr DWRs</b>	<b>Qty Posted to Dt</b>	<b>Unit</b>
	50,000.000	37,500.00	0.000	0.000	

- Click on the > next to the line item number to expand the row.
- Add the Quantity in each row.

Proj Ln N...	Proj - Cat	Item - Descr	Pending CO Qty	Pend CO Ext Amt
0160	5157010000I - 0001	301020340 - CRUSHED AGGREGATE COURSE	0.000	17,333.42
>	<b>Curr Qty</b>	<b>Curr Ext Amt</b>	<b>Qty Posted to Dt Appr DWRs</b>	<b>Qty Posted to Dt</b>
	12,604.000	327,704.00	0.000	0.000
				<b>Unit</b>
				CUYD

Quantity *	Pending CO Ext Amt
<input type="text" value="666.670"/>	17,333.42
999,999,999.999	
<b>Unit Price</b>	
26.00000	

Proj Ln N...	Proj - Cat	Item - Descr	Pending CO Qty	Pend CO Ext Amt
0760	5157010000I - 0001	622011084 - GEOTEXTILE STABILIZATION	0.000	1,333.34
>	<b>Curr Qty</b>	<b>Curr Ext Amt</b>	<b>Qty Posted to Dt Appr DWRs</b>	<b>Qty Posted to Dt</b>
	1,968.000	3,936.00	0.000	0.000
				<b>Unit</b>
				SQYD

Quantity *	Pending CO Ext Amt
<input type="text" value="666.670"/>	1,333.34
999,999,999.999	
<b>Unit Price</b>	
2.00000	

- Click the Save on the component action ribbon.

### New Items Tab

- The **New Items** dop menu is for items that have not been associated with the contract and items need to be added to it. (AR accounts also apply in this section).

- An **unattached item** is an item added to the contract after the contract has been executed. Unattached items are included in contract categories and can be tracked on daily work reports, but are not recognized as contract items by the system and cannot be included in a contract payment until they are added to the contract through a change order and the change order is approved.
- **Contract items** are items that are already associated with this contract, but need to be added to one or more additional projects/categories. This can include adding the contract item to a different category within the same project.
- The HELP button on the Global Action Row is a great source of information. You can search for Change orders if you need extra information.

▼ New Items

Advanced

Projects

Select New Item...

*No rows found matching criteria.*

▼ Unattached Items

Advanced

Projects

Select Unattached Item...

*No rows found matching criteria.*

▼ Contract Items

Advanced

Projects

- For the New Items menu, select the Select New Item... button
- When the new screen appears, you will notice that the top box, Reference Item, has a red asterisk. This is a required field. Put your cursor in the box and hit the Enter key.
- Select the project that this change order will be attached to.

**Reference Item \***

EXCAVATION-DIGOUTS CUYD - Cubic Yards

Item Description

EXCAVATION-DIGOUTS

Unit of Measure

CUYD - Cubic Yards

Advanced
Showing 7 of 7

Projects

Categories

Select: All | None 1 selected

Project	Project Description	Category	Category Description
✓ 5157010000I	MILK RIVER - NORTH	0001	GRADE, GRVL, PL MIX SURF, DRAINAGE
9028052000I	NASHUA - EAST & WEST	0001	OVERLAY, SEAL & COVER - NON - IR
5157010000I	MILK RIVER - NORTH	0002	277' PRESTRESSED CONC BEAM ID # 0

- Click on the Add to Change order button at the bottom of the screen.
- This will bring you back to the New Items Tab.

You will notice that it populates the project line item and the Contract Item Line Number. These will need to be changed to a 6-digit number. Change order numbering starts with 9 to show that it is a change order. 9XXYYY where XX is the change order number and YYY is the item number starting with 010 and increasing incrementally by 10's for each change order. Example CO #1 = 901010, 901020 etc., CO #2 902010, 902020 etc., CO #3 903010, 903020 etc.

- The contract line item number will also need to be changed to match the Project Line Item Number.

Unit	Proj - Descr	Cat - Descr
CUYD - Cubic Yards	-	0001 - GRADE, GRVL, PL I
Qty	Price	Ext Amt

<b>Project Item Line Number*</b> ▼	<b>Unit Price*</b> ▼
<input type="text" value="1350"/>	<input type="text"/>
<b>Contract Item Line Number*</b> ▼	<b>Extended Amount</b>
<input type="text" value="1380"/>	

<b>Project Item Line Number*</b> ▼	<b>Unit Price*</b> ▼
<input type="text" value="901010"/>	<input type="text" value="30.00000"/>
<b>Contract Item Line Number*</b> ▼	<b>Extended Amount</b>
<input type="text" value="901010"/>	18,000.00
<b>Quantity*</b> ▼	<b>Supplemental Description</b> ▼
<input type="text" value="600.000"/>	<input type="text"/>

- Fill in the Quantity amount. For this example, it is paid for as cubic yards and the quantity will need to be shown as such.
  - Fill in the unit price. This is normally the agreed price between the EPM and the Contractor.
  - The funding category is not a requirement for most items.
  - You can add a subcontractor if they are doing the work, but it will be under the assumption that the Prime will be doing the work.
- 
- Click on the Save button on the component action ribbon.
  - You can add multiple items that apply. It should be noted that AR accounts will require a funding category. This account information is set in Helena. (It is requested that the information of an AR account be documented on the General Tab also. Under the Explanations Gen/Supp Explanation is a good place to enter that information)

<input type="text" value="1"/>	<input type="text" value="Damaged Item"/> EX - Extra Work	<input type="text" value="Replace items damaged by traffic at the spe"/>	<input type="text" value="Replace luminaire pole 64 at station 1223+95 right that was damaged. AR account is 22028."/>
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<b>Funding*</b> ▼
Cat 4 - AR22028 - AR 22028 Light Pole repair
Cat 3 - 9503 - 8176-076 - Funding purposes only
Cat 1 - 9501 - 8167-076 NH-R
Cat 4 - AR22028 - AR 22028 Light Pole repair
Cat 2 - 9302 IC - 8167-076 NH-F
Select Unattached Item...

- Once the rest of the items have been added, click on the Save Button.

### Time Adjustments Tab

- This tab is for contract time that needs be added to the contract.
- Click on the gray Select Contract Time button.
- Place the cursor in the search box and hit the Enter.
- Select the Contract this will apply to.
- Note that for Calendar Day projects, you can select this milestone option if it applies.

Time ID	Time Descr	Time Type
00 AT	GRADE, GRVL, PMS AND STRUCTURE	Available Time
MLSTNCD	Milestone - Calendar Day	Available Time

- Click on the Select Time Adjustments to Change Order button once the selection has been chosen.
- Select the > by the Time ID to expand the box (if it does not automatically do it for you.)
- Add the amount of time to be added to the contract in the Adjustment Time Units box.

The screenshot shows a form for adjusting time units. It includes a table with columns for Time ID, Time Descr, Adj Time Units, and Adj Completion Date. Below the table, there are input fields for Time ID (00 AT), Time Description (GRADE, GRVL, PMS AND STRUCTURE), Adjustment Time Units (-5.00), and Adjustment Completion Date. There is also an Original Completion field.

- Click Save on the component action row once this information has been entered.

### Review Tracking Tab

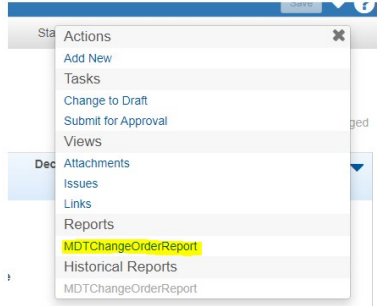
- Once the change order has the required information entered, it can be submitted for review from required personnel.
- Click on the Select Reviewers button.
- You can choose the reviewers from the generated list if you know who it needs to go to.
- You can also select the drop-down arrow from the System default box and select your district. These are preloaded with the personnel that the change order should be sent to.

The screenshot shows a search box with the text 'Type search criteria or press Enter'. Below it is a list of reviewers with columns for User Name and System Default. The System Default dropdown is open, showing options like 2-Butte CO, 1-Missoula CO, 5-Billings CO, 4-Glendive CO, 3-Great Falls CO, System Default, and Advanced.

- Select the appropriate personnel.
- This will automatically save and send notification to the personnel on the list.
- If the change order is rejected for revision, this will cancel out the current round of approvals.
- Make the requested corrections and resubmit to the reviewers.

**Approval Tracking Tab**

- Once the change order has been approved from the appropriate levels, you can click on the Generate Report under the global actions and generate the report. You can also select the down arrow on the Component action ribbon and select the MDTChangeOrderReport. This will bring up the change order for contractor to sign.



- Once the contractor has signed the change order, the EPM will go into the approval tracking tab.
- The EPM will then add the appropriate Approval groups by selecting the Add Approval Group button.
- Select the appropriate approval levels.
- Click on the Save button in the bottom right corner.

Reference Approval Group	External Group	Contractor Group	Minimum Approval Level
1 - Contractor	No	Yes	No
2 - EPM	No	No	Yes
3 - Construction Reviewer	No	No	Yes
4 - District Construction Engineer	No	No	Yes
5 - District Administrator	No	No	No
6 - Construction Administration Engineer	No	No	No
7 - FHWA	Yes	No	Yes

- If the contractor has signed the change order, the EPM will then switch to the contractor role and fill out the date and information of when the contractor has signed the change order.
- The information for the rest of the reviewers approving on the change order will also need to be entered.
- Click the save button.