

AASHTOWare Project Construction and Materials™

Quick Reference Guide for TDOT

Managing Change Orders

Role: Office Staff V3

Key to Actions Menus:



Global **Actions** menu
(At the top of the
screen)



Component **Actions**
menu (On the heading)



Row **Actions** menu
(On the row)

Background:

- Change orders allow you to legally change a signed contract, including adding new items of work to the contract, increasing/decreasing quantities of existing items, making time extensions, setting final quantities, and specification changes.

Adding a Change Order to a Contract:

By default, every new change order has a status of *Draft*.

Navigation: **Construction** > [Contract Progress](#)

- From the Contract Administration Summary, click the [Contract Progress](#) quick link.
- Search and select the appropriate contract.
- Click the **Change Orders** tab.
- Click the **Add** button.
- In the **Change Order Date** field, enter the date of the change order.
- In the **Description** field, enter a description for the change order.
- In the **Change Order Type** field, click the drop-down arrow and select the classification for the change order.
- In the **Reason** field, click the drop-down arrow and select the value that indicates the general reason for the change order.
- Click the **Save** button.

- Note:** The **Total of Previously Approved Change Orders** field indicates the total amount of all other change orders for this contract that have reached approval status.

Changing Item Quantities with a Change Order:

Contracts may need to increase or decrease the quantity of a work item that was approved in the executed contract. The **Increase/Decrease Items** tab contains a row for each item quantity being changed on this change order.

- Note:** If a unit price change order is requested and the installed material shall remain in place, do not zero out the quantity for the existing line item. Be sure to record newly installed quantities, as applicable, under the new line item with the modified unit price.

Navigation: **Construction** > [Change Order](#) > (Select contract and change order) Contract Change Order Overview > Increase/Decrease Items tab

- Click the **Increase/Decrease Items** tab.
- In the **Increase/Decrease Items** section, click the **Select Items** button.
- Search for and select the item(s) to change.
- Click the **Add to Change Order** button.
- Click the arrow to expand the row.
- In the **Quantity** field, enter the change to the approved quantity for the contract project item.
- Click the **Save** button.

Adding New Items to a Contract with a Change Order:

Contracts may require the addition of new work. This is where new reference items are added to the contract.

- Note:** New items cannot be posted to a DWR until the change order is approved.

Navigation: **Construction** > [Change Order](#) > (Select contract and change order) Contract Change Order Summary > New Items tab

- Click the **New Items** tab.

2. In the **New Items** section at the top, click the **Select New Item** button.
3. In the **Reference Item** field, search for and select the item to add to the change order by item number or item description.
4. Click the row for the project/category to which the item will be added.
5. Click the **Add to Change Order** button.
6. Click the expand arrow for the row.
7. The **Project Item Line Number** field will automatically be numbered starting at 9000 item line number at the beginning of the contract.
8. The **Contract item Line Number** field will also be maintained by the system.
9. In the **Quantity** field, enter the number of units of the item that are required.
10. In the **Unit Price** field, enter the unit price for the item at the contract project level.
11. After clicking the **Save** button, the **Extended Amount** field shows the extended amount for the new item on the change order.
12. In the **Supplemental Description** field, enter an additional description for the item, if appropriate. If required and not entered, the user will be prompted when the **Save** button is clicked.
13. Click the **Save** button.

Splitting Items by Project Number on a Change Order:

Existing contract items may need to be added to other projects on the contract. This is where the current contract items are added to different projects and/or categories.

- **Note:** New items cannot be posted to a DWR until the change order is approved.

Navigation: **Construction** > [Change Order](#) > (Select contract and change order) Contract Change Order Summary > New Items tab

1. Click the **New Items** tab.
2. In the **Contract Items** section at the bottom, click the **Select Contract Item** button.
3. In the **Contract Item** field, search for and select the contract item to split by Project Number to the change order by item number or item description.
4. Click the row for the project/category to which the item will be added.
5. Click the **Add to Change Order** button.
6. Click the expand arrow for the row.
7. In The **Project Item Line Number** field will automatically be numbered starting at 9000 item line number at the beginning of the contract.
8. The **Contract item Line Number** field will also be maintained by the system.
9. In the **Quantity** field, enter the number of units of the item that are required.

- **Note:** The total contract quantity is not being changed. It is split between project(s). The user must change the item quantity of the first contract item using the Increase/Decrease tab (but not reducing below what has been paid).
10. In the **Unit Price** field, the unit price for the original contract item is displayed.
 11. The **Extended Amount** field shows the extended amount for the new item on the change order.
 12. In the **Supplemental Description** field, the additional description for the original item is displayed, if there is one.
 13. Click the **Save** button.

Adjusting a Contract Time with a Change Order:

A common reason for creating a change order is to adjust the completion date for a contract because work has fallen behind. The **Time Adjustments** tab contains an accordion list of all the time adjustments that have been recorded in the change order.

If the **Time Type** for the adjustment is Available Time or Calendar Time, you can change the value in the **Adjustment Time Units** field. When you save the change, the system automatically recalculates the value in the **Adjustment Completion Date** field.

If the **Time Type** for the adjustment is Completion Date, you can change the value in either the **Adjustment Time Units** field or the **Adjustment Completion Date** field. Depending on the field used, the corresponding field will automatically calculate (after clicking save).

Navigation: **Construction** > [Change Order](#) > (Select contract and change order) Contract Change Order Summary > Time Adjustments tab

1. Click the **Time Adjustments** tab.
2. Click the **Select Contract Time** button.
3. Search for and select the contract time records to adjust.
4. Click the **Add Time Adjustments to Change Order** button.
5. In the **Adjustment Time Units** field, enter the number of time units to add or remove from the associated contract time on this change order.
6. Click the **Save** button. Then the corresponding field will calculate automatically.

Change Order Explanations:

In AWP, the system will automatically build the Change Order Report based on the Change Order details entered. Therefore, only the freeform project specific portion of change order will need to be added by this explanation.

Navigation: **Construction** > [Change Order](#) > (Select contract and change order) Contract Change Order Summary > Change Order Explanations section

1. In the **Change Order Explanations** section (located at the bottom of the window), in the **Order** field, type 1.
 - **Note:** The **Change Order Explanation** field is limited to 30,000 characters. If needed, add an additional change order explanation.
2. In the **Supp Explanation** field, enter any additional, non-standard explanation text required on the change order report.
3. Click the **Save** button.

Generating the TN ChangeOrderForm Report:

The TN ChangeOrderForm Report will be used during the Adobe Sign process.

Navigation: **Construction** > [Change Order](#) > (Select contract and change order) Contract Change Order Summary

1. Click the component **Actions** menu.
2. From the **Reports** section, select the **TN_ChangeOrderForm**.
3. Leave the **Output Type** set to the default option.
4. Leave the **Report Layout Source** set to the default option.
5. Click the **Execute** button.

Submitting a Change Order for Approval:

When the change order is deemed ready, it must be submitted for approval to begin the approval processes.

Navigation: **Construction** > [Change Order](#) > (Select contract and change order) Contract Change Order Summary

1. On the Contract Change Order Summary for the appropriate change order, click the component **Actions** menu and select the **Submit for Approval** task.
2. Click the **Save** button.

Denying a Change Order:

Denying a change order will not be used often, however may be necessary to close out a contract. This will be used when a change order will never be approved.

Navigation: **Construction** > [Change Order](#) > (Select contract and change order) Contract Change Order Summary

1. On the Contract Change Order Summary for the appropriate change order, click the component **Actions** menu and select the **Change to Denied** task.
2. Click the **Save** button.

Next Steps:

After managing change orders, the next step is to Manage Contract Change Notifications. Refer to TDOT Quick Reference Guides and CBTs for more information.