

Quick Reference Guide

Last Modified: 01/23/2007 04:08:40 PM
Reviewed for Version: SiteManager 3.7

Creating a Change Order

So, you are ready to create a SiteManager Change Order? Here's a quick reference on what steps to take:

Change Orders>Change Order Maintenance>Header

1. **Tentative Verbal Approval Dates:** Will be used if they apply to a contract.
2. **Status:** Leave Status as Draft until all of the items and explanations are entered correctly. After all of the other steps have been correctly entered, return to the header and save it as pending. The change order will then be forwarded to the people you choose as approval levels.
3. **Description:** A short description of the Change Order. Don't just indicate which Change Order it is. This description is on several screens including the change order reports.
4. **Reason Code:** Choose reason code from drop down list. If you are unsure, call the Construction Division for assistance.
5. **CO Type:** Choose the type of change order. Several types are shown in the list however, you will choose only one of three types. Refer to the policies and procedures.
6. **Functions:** Function must be chosen for the type of items in the Change Order. Every Function that is applicable to the change order must be checked or an error will appear when entering items. **DO NOT** use the Force Account check box. ODOT will not be using the Force Account section of SiteManager since it does not match our specifications at this time. The Zero Dollar function would be used for specification changes that do not alter item quantities or unit prices.
7. **Emergency Work:** ODOT will not use this check box.
8. **Force Account:** ODOT will not use this indicator.
9. **Reference Doc:** If this change is addressing issues on a dispute/claim, indicate the dispute/claim number
10. **Generic Fields:** If the change is adding a new item of work and the total amount for the new item exceeds \$10,000, indicate the date that you reviewed and accepted the required Cost Breakdown forms.
11. **Attachments:** Electronic documents can be attached. An example of an electronic document that may be attached is Form 1365 from the FHWA.

Change Orders>Change Order Maintenance>Change Order Items

Change Order Item Folder Tab

1. Don't forget the first step is to select New Change Order Item from the Services Menu.
2. You cannot zero out an item in a change order. Therefore, if you have an item which needs to be considered a "no cost" change, you must zero out the original item and add a new change order item, using the New Contract Item folder tab, to the contract.
3. **Change Order Item Description:** This is the description that shows up on the explanations window, if you do not enter something here the explanations window will just have the item and line numbers for each change order item with no description.

4. **This Change Order Quantity:** The quantity of the change. Enter underruns as negative amounts.
5. **ODOT will no longer process a change order which adds items but will not require additional appropriations. If you are adding items to a contract or indicating the overrun of existing items-and you do not need additional appropriations-you must show the underrun items which offset the cost.**

New Contract Item Folder Tab

1. **Line Item Nbr:** Line numbers, for new items added to the contract, will begin with 8000 and continue sequentially.
2. **Project Nbr:** The project number that the new item applies to.
3. **Item Code:** Perform a search and pick the item code. "Construction Engineering" items will not be used unless no other standard item exists to identify the work. If a "Construction Engineering" item is chosen, the construction methods, material requirements, and method of measurement must be included in the change order.
4. **Major Item, Specialty:** If the new item is a major item-as defined by our specifications-click the check box. If the new item is a specialty item, click the check box.
5. **Unit Price:** Enter the unit price for the item.
6. **Related Item:** Indicate if the new item is a Standard, Non-standard, or Failing Material Deduction pay item.
7. **Critical:** ODOT will not use this indicator.
8. **Pay Plan Qty:** Check this box if the item is to be paid on a plan quantity basis in accordance with our specifications. Make sure and identify that this item will be paid on a plan quantity basis in your specific line item descriptions. If this box is checked it will not be possible to overrun this item above this Change Order amount without processing another change order.
9. **Supplemental Descriptions:** Supplemental descriptions are required in certain cases. Refer to the policy and procedure.
10. **Category Number:** For funding purposes, select a Category Number. If the appropriate category does not exist in the system (such as a non-participating category), call the Construction Division to have the category set up with the appropriate funding.
11. **See Number 5 for the Change Order Item Folder Tab above**

Change Orders>Change Order Maintenance>Change Order Explanations

1. A general explanation will be required for all change orders. The general explanation should explain the overall intent of the change. Certain change order functions will require specific standard explanations
2. Specific line item explanation will be required for each item on the change. The specific line item explanation should indicate why the item was included on the change order. This would be the place where the construction methods, materials requirements, and method of measurement would be indicated for non-standard pay items.

Saving a Change Order

1. To save the change order and get it on its way in the approval cycle, return to the Header window and change status from draft to pending, then save. Designate the people that should approve the change. Refer to the policies and procedures for the appropriate selections.

Deleting a Change Order

1. To delete a Change Order the explanations and items must be deleted before the header information can be deleted. A Change Order which has been approved cannot be deleted.