

Entering a Change Order

Change Orders, or Modifications, are issued by the Contracting Officer to document changes to cost, time, scope, and/or clarification to contract terms to an awarded Contract on a DGS project. Additional Change Order records in ProjectTeam are also used to capture the 2nd (or 3rd, 4th, etc.) purchase order issued for a contract or Change Order when multiple purchase orders are awarded due to funding splits or phased funding availability.

Change Order and recorded in the associated project in ProjectTeam by the DGS Project Manager. It is the responsibility of the DGS Project Manager to obtain copies of each signed Change Order and to correctly enter Change Orders in ProjectTeam in a timely manner. Change Orders must be entered in ProjectTeam to maintain the project record, facilitate Payment Applications and Invoices, control project finances and for change management purposes.

Each purchase order issued on a Project needs to have its own separate record in ProjectTeam. If a Change Order awarded to a vendor includes multiple purchase orders (POs), you will need to enter each purchase order via a standalone Change Order record. Use suffixes like ‘-Part A’ and ‘-Part B’ or ‘-Part 1’ and ‘-Part 2’ as part of the Change Order record Title and Change Order/Modification Number fields to identify and group multi-PO awards.

All Change Orders must begin with a Potential Change Order (PCO) submitted by the vendor except in the case of multiple purchase orders awarded with a single Contract or Change Order. Do not create a Change Order in Project Team without a properly submitted and acknowledged PCO (see note below).

NOTE: A PCO for each PO is NOT required for additional POs awarded for a single Contract or for multi-PO Change Orders. For multi-PO Contract change orders, create the Change Order records manually without PCO For multi-PO change orders, use the PCO from the vendor to create the first Change Order for the lowest numbered PO and manually create each additional Change Order for the associated POs without PCOs. Enter the amount of the first awarded PO as the DGS Acknowledged Cost for the PCO and include a note on the split POs and total amount in the DGS Determination field.

Please reach out to DGS.ProjectTeam@dc.gov if you need clarification or have any questions.

Creating a Change Order

There are two locations where a Change Order can be created:

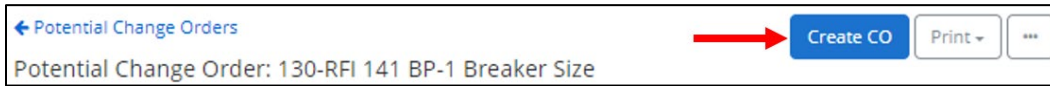
From a Potential Change Order (PCO) – required method for all Change Orders not resulting from multiple POs awarded with a Change Order or Contract

From within the Change Order Form/Log – only used when entering Change Orders for 2nd (or 3rd, 4th, etc) purchase order when multiple purchase orders are awarded for a single Contract or Change Order

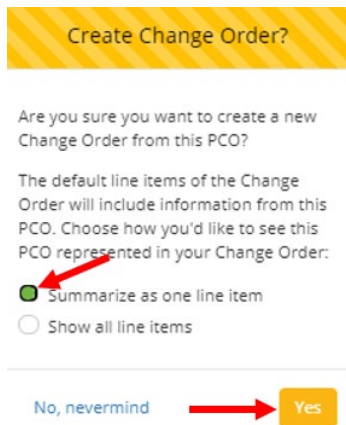
Both methods are covered below.

Creating a Change Order from a Potential Change Order (PCO)

1. Open the appropriate fully acknowledged PCO and click on the **Create CO** button at the top right corner.



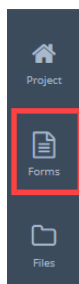
2. Select the format that the PCO line item(s) will be added to the Change Order. The options are for this PCO's Line Item(s) to be added as one consolidated Change Order Line Item, or for this PCO's Line Item(s) to be added as they are in the PCO into the Change Order Line Item(s).



3. Enter the remaining Change Order information as instructed below beginning with Step 5.

Creating a Change Order from within the Change Orders Form/Log

1. Within the project, click the **Forms** icon on the left navigation pane.



2. In the search field, begin typing **Change** and the form will appear in the forms list. Click **Change Order** to open.

- Click on the **New** button

- Select the Contract **related** to this Change Order and then click on **Choose Contract**

Type	Title	PO Number	Vendor Company	Unit Price Contract
☒ Contract	General Contractor	PO0654892	ACME Construction	☐

- In the **General Tab** enter a **Title** for the Change Order. This should be brief description of what the Change Order is for and should include the vendor's name. For example, 'XYZ Construction- Additional Time for Art Installation'

NOTE: An example of appropriate *Titles* for a multi-PO change order would be 'XYZ Construction- Additional Time for Art Installation'-Part 1-Capital Portion' and 'XYZ Construction- Additional Time for Art Installation'-Part 2-Operating Portion'.

- The **Change Order/Modification Number** will automatically populate the next sequential number based on previous Change Orders This auto-number should be manually changed if the number is not correct or additional info is required for situations like multi-PO change orders.

An example of an appropriate *Change Order/Modification Numbers* for the same records would be 'Mod 2-Part 1-Capital' and 'Mod 2-Part 2-Operating'.

Change Order/Modification Number *

0002

- Click inside the **Date Issued** field and select the date that the Contracting Officer signed the Change Order from the pop-up calendar.

Date Issued

- Enter a **Description of Change(s)**. This is the scope of what is included in the Change Order and can be copied from the signed CO/MOD.

Description of Change(s)

- The **Contract Reference** field will automatically bring over the related Contract Reference.

Contract Reference ?

- The **Change Order Type** is populated by the system and should always be **Contract**.

NOTE: Please reach out to DGS.ProjectTeam@dc.gov if the Change Order Type is anything other than "Contract"

Change Order Type

Contract

- The To Business is populated by the system will be the Company performing the Change Order work.

To Business

- The following fields are displayed information and are not edible. This information comes from the Contract, other approved Change Orders, and this Change Order. The information showing will change as the related Contract and Change Orders are approved.

Original Contract Value
Sum of Previously Approved Changes (Value)
Previous Contract Value
This Change Order (Value)
Revised Contract Value
Original Contract Completion Date
Sum of Previously Approved Changes (Days)
Previous Contract Completion Date

13. Enter the number of additional calendar days awarded in this change order in the **This Change Order (Days)** field*. Enter a negative number (i.e. '-25') if time is reduced by the change order.

NOTE: Additional days added to the contract by Change Order extend the *Contract Completion Date* (also known as the *Final Completion Date*) of the contract. If the Change Order changes milestone dates such as the *Substantial Completion Date* and/or *Administrative Term Date*, but does not change the *Contract Completion Date*, enter "0" days in this field as the change does not extend the contract period of performance.

*If entering Change Order(s) for multi-PO awards, only enter the additional days in one of the associated Change Orders records.

This Change Order (Days)

14. The **Revised Contract Completion Date** will automatically calculate the date based on the approved day changes from all approved Change Orders.

Revised Contract Completion Date ⓘ

15. Select the appropriate **Category** for the Change Order from the picklist. Reach out to your EPM or DGS.ProjectTeam@dc.gov if you are unsure of the Category.

Category

16. Enter the **Change Order PO Number** related to this Change Order.

Change Order PO Number

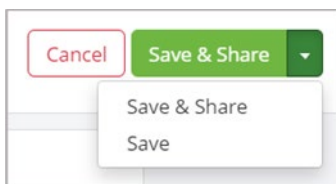
17. Select the **Revised Substantial Completion Date** if the Change Order changes the Substantial Completion Date for the Contract. Leave this field blank if no changes are made to the Substantial Completion Date by this Change Order.

Revised Substantial Completion Date

18. Select the **Revised Administrative Term Date** if the Change Order changes the Administrative Term Date for the Contract. Leave this field blank if no changes are made to the Administrative Date by this Change Order.

Revised Administrative Term Date

NOTE: If adding multiple PCOs to a single Change Order, save and share the record at this point. This will enable the “Add PCO” button to be used in the next section.



Change Details Tab

The **Change Details** tab is where the current Change Order’s Cost and Schedule impacts are populated by the related PCO(s). Each row that makes up the Change Details tab will appear as its own row on future Payment Applications.

NOTE: Every Change Detail row must be populated by a PCO. Do not manually create a new Change Detail line.

1. Review the **Change Details** populated by the related PCO.

General Change Detail					
Change Details					
Source Type	Title	DGS Use Only - Acknowledged Cost	Acknowledged Schedule Impact (Days)	Account Code	Budget Line Item
PCO	PCO GMP Submission: 003-Contract Modification #1	\$37,130,137.00	642		
		Total \$37,130,137.00			

- To add another PCO to the Change Order, click on the **Add PCO** button in the upper right corner.

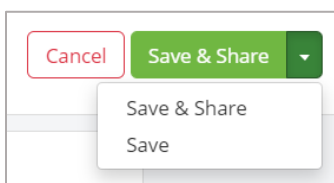


- Select the **PCO(s)** to add.
- Set the **Show All Line Items** option based on the needs of the Change Order.
- Click **Add**.
- Repeat** adding PCOs as needed

NOTE: Ensure that the **Show All Line Items** option is set to **No** for each added PCO so that the system will consolidate each PCO's Line Item(s) into **one cost line** for that PCO on the Change Order.

A screenshot of the 'Add Change Details' dialog box. It features a search bar at the top. Below it is a table with the following columns: 'Title', 'DGS Use Only - Acknowledged Cost', 'Acknowledged Schedule Impact (Days)', and 'Show All Line Items'. A single row is visible with the title 'Test PCO # 2 - A/E', a cost of '\$45,000.00', and an impact of '30'. The 'Show All Line Items' column has a dropdown menu set to 'No'. Red arrows point to the checkmark in the first column, the 'Show All Line Items' dropdown, and the 'Add' button at the bottom right. A 'Cancel' button is at the bottom left.

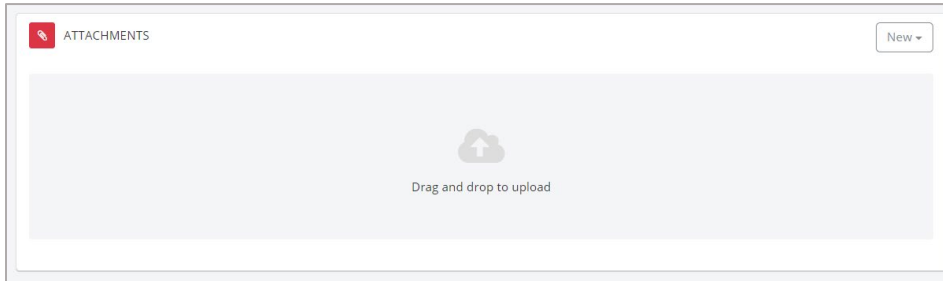
- When the Change Order is complete, click **Save** or **Save & Share**.



Attaching Supporting Documentation

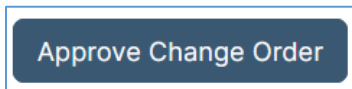
1. Drag and drop any supporting files to the **Attachments** section of the record. Copies of the **signed Change Order** and associated **Purchase Order** are required attachments to each Change Order, at minimum.

NOTE: When entering Change Orders for multiple purchase orders awarded on a single Contract or Change Order, attach copies of the signed Change Order and relevant purchase order to each Change Order record.

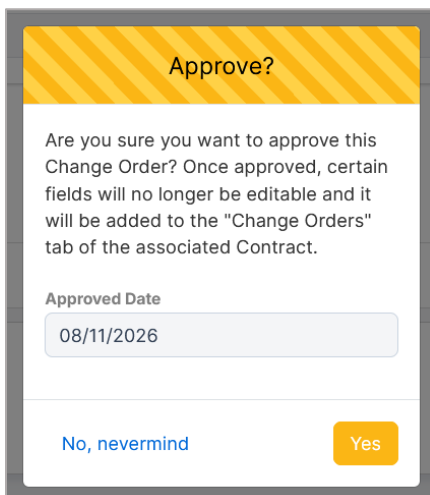


Approve the Change Order

1. Once the Change Order record is complete, saved, and the signed executed copy and PO if applicable, are attached, you will need to 'approve' the change to apply it to the contract in the system. Click the **Approve Change Order** button located in the top right corner on the record.



2. A window will open allowing you to select the Approved Date by clicking in the date field and selecting the appropriate date from the pop-up calendar. The **Approved Date** is the date that the Contracting Officer signed the Change Order and should match the **Date Issued** field from the record. Once the Approved Date date is correct, click the **Yes** button.



Note: Make sure to update the **Status** and **Status Notes** fields, record the associated PO Number in the **PO Number (PASS)** field, enter the **PO Vendor Name**, and check the **PO Issued** box on the associated Requisition Request form at this time.