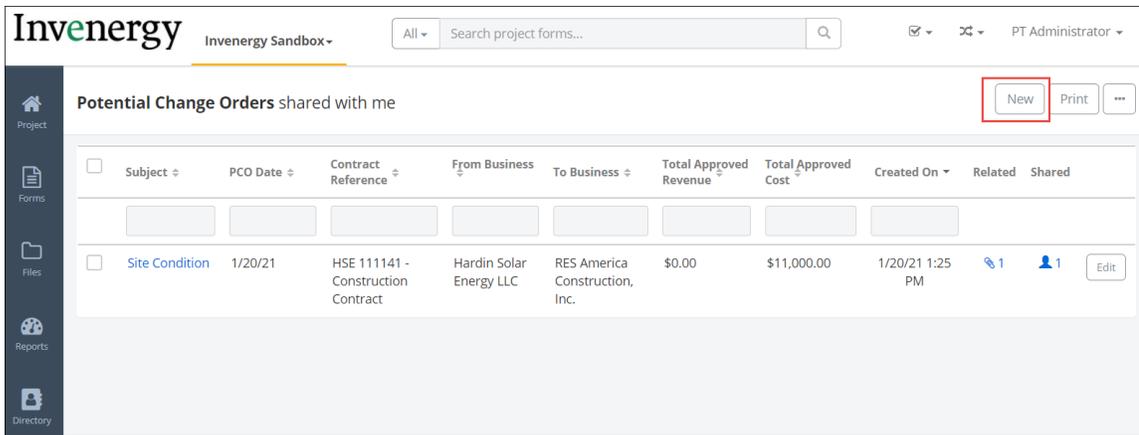


Potential Change Orders

A **Potential Change Order** is a method of tracking cost and revenue changes for revised Scopes of Work that may either add or deduct funds or time to the project. **Potential Change Orders** may be associated with **Directives**, **Request for Proposals**, **Cost Proposals** and/or **Change Orders** to properly document changes on the project.

Creating a Potential Change Order

1. Navigate to the Potential Change Order log within a project.
2. Click the New button on top of the Potential Change Order log.



The screenshot shows the 'Invenergy' interface for 'Invenergy Sandbox'. The main heading is 'Potential Change Orders shared with me'. A 'New' button is highlighted with a red box. Below the heading is a table with the following columns: Subject, PCO Date, Contract Reference, From Business, To Business, Total Approved Revenue, Total Approved Cost, Created On, Related, and Shared. One entry is visible with the subject 'Site Condition'.

Subject	PCO Date	Contract Reference	From Business	To Business	Total Approved Revenue	Total Approved Cost	Created On	Related	Shared
Site Condition	1/20/21	HSE 111141 - Construction Contract	Hardin Solar Energy LLC	RES America Construction, Inc.	\$0.00	\$11,000.00	1/20/21 1:25 PM	1	1

3. Prior to creating a Potential Change Order the User must have a contract with a **Type of Contract** as **“Contract”** created to post the change against. The **Choose Contract** modal window opens. Using the **radio** button, select the Contract that is affected by this change and click the **Choose Contract** button at the bottom.



The screenshot shows the 'Choose Contract' modal window. It has a search bar at the top. Below it is a table with columns: Subject, Contract #, and To Business. One entry is visible with the subject 'Prime Contract'. A radio button next to this entry is highlighted with a red box. At the bottom of the modal, there are 'Cancel' and 'Choose Contract' buttons, with the latter highlighted with a red box.

Subject	Contract #	To Business
Prime Contract	001	ProjectTeam, Inc.

- The New Potential Change Order window opens. Type the required field **Subject** and any remaining fields necessary to properly document the change you are tracking pricing for.

New Potential Change Order

Cancel Save & Share

General Incls, Excls, & Alts

Subject * Required
Type the Subject

PCO #
Type the PCO #

PCO Date

Directive Reference

Contract Reference
001 - Prime Contract

From Business
ProjectTeam, Inc.

From Contact
Debra Rakes (ProjectTeam, Inc.)

To Business
Owner Company

- Note:** The **Contract Reference, From Business, From Contact, To Business** and **To Contact** will automatically populate based on the contract selected if this information was completed in the contract data form.
- Scroll down to the **Cost Breakdown** collection to enter information about the costs and revenue associated with this potential change. Click **Create New** to add a new line item.

Cost Breakdown

Add Cost Proposals Create New

Row #	Description	Subcontract Reference	Responsible Business	Contact	Revenue			Cost	
					Estimated	Proposed	Approved	Estimated	Proposed
					Value	Value	Value	Value	Value
1	Additional t				\$10,000.00	\$12,000.00	\$11,000.00	\$10,000.00	\$12,000.00
					Subtotal \$10,000.00	Subtotal \$12,000.00	Subtotal \$11,000.00	Subtotal \$10,000.00	Subtotal \$12,000.00
					Total \$10,000.00	Total \$12,000.00	Total \$11,000.00	Total \$10,000.00	Total \$12,000.00

- The PCO is populated from the Prime Contractor’s perspective. Therefore, the revenue fields refer to changes between the prime and Invenergy and the cost fields refer to changes between the prime and their subcontractors. In most cases the cost fields will be left blank or will be equal to the revenue fields. For both revenue and cost the PCO can track the life cycle of the change from initial estimate, to contractor proposed value, to final approved amount. If this PCO becomes a Change Order, it is the Approved Revenue value that is handed off to the Change Order. Enter data as appropriate and click **Add**.

Add Line Item

Description
Unforeseen Condition

Subcontract Reference

Responsible Business
ProjectTeam, Inc.

Contact
Brian Rothery

	Estimated	Proposed	Approved
	Value	Value	Value
Revenue	\$10,000.00	\$12,000.00	\$11,000.00
Cost	\$10,000.00	\$12,000.00	\$11,000.00

Requested Days

Cancel Add & New Add

- Click **Save** at the top of the form to save changes made to the PCO. When the PCO is complete and ready to submit to Invenergy, **Share** the PCO with the “(WF) Project Manager” share group.

Share this document

Share To users Share To email

Search... Apply distribution lists

- (WF) Electrical Engineer Invenergy LLC
- (WF) EVP Invenergy LLC
- (WF) POI Contractor Invenergy LLC
- (WF) POI Engineer Invenergy LLC
- (WF) Project Manager Invenergy LLC
- (WF) Structural Contractor Invenergy LLC
- (WF) Structural Engineer Invenergy LLC
- (WF) SVP Invenergy LLC
- (WF) Transmission Contractor Invenergy LLC
- (WF) Transmission Engineer Invenergy LLC
- (WF) VP Invenergy LLC

Cancel Share