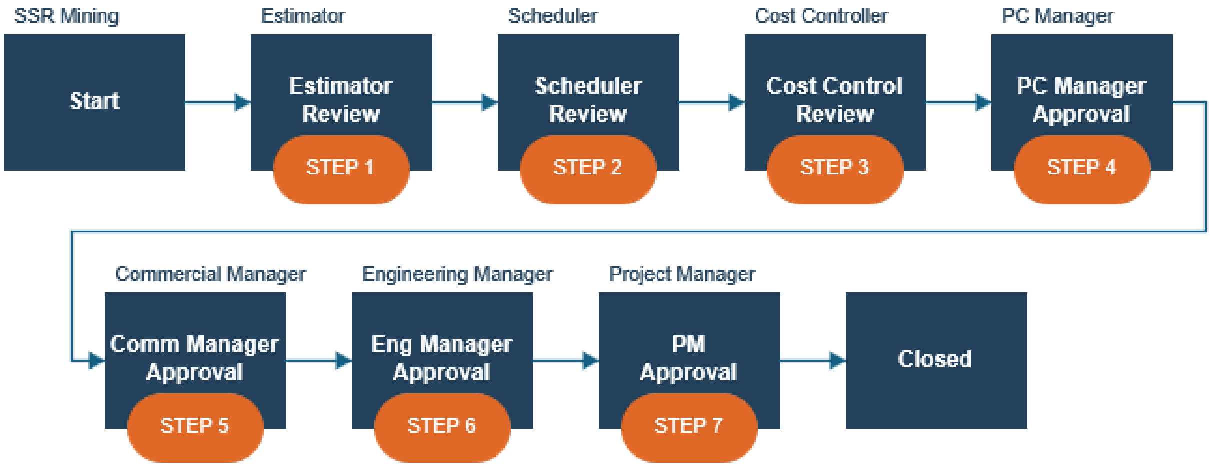
BUDGET AMENDMENTS (CHANGE NOTICES)

Project Additions, Deductions and Allocations are managed by the Change Notice Process in Budget Amendments. Project team members from SSR have access to start a Budget Amendment by filling out the Origination Section and starting the Change Notice workflow.

The workflow steps send the Change Notice to the Estimator, Scheduler, and Cost Controller for input. Each of these roles has a section to complete in the form. Once the Cost Controller passes their workflow step, the workflow continues to the approval phase. The PC Manager, Commercial Manager, Engineering Manager, and Project Manager each pass their workflow step as approval of the change.



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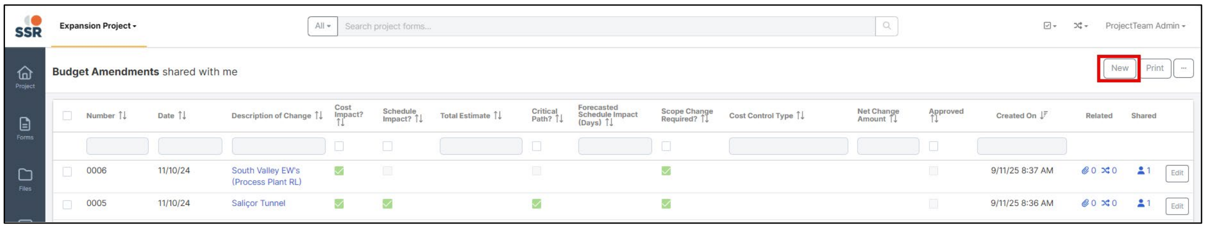
ORIGINATE A CHANGE NOTICE

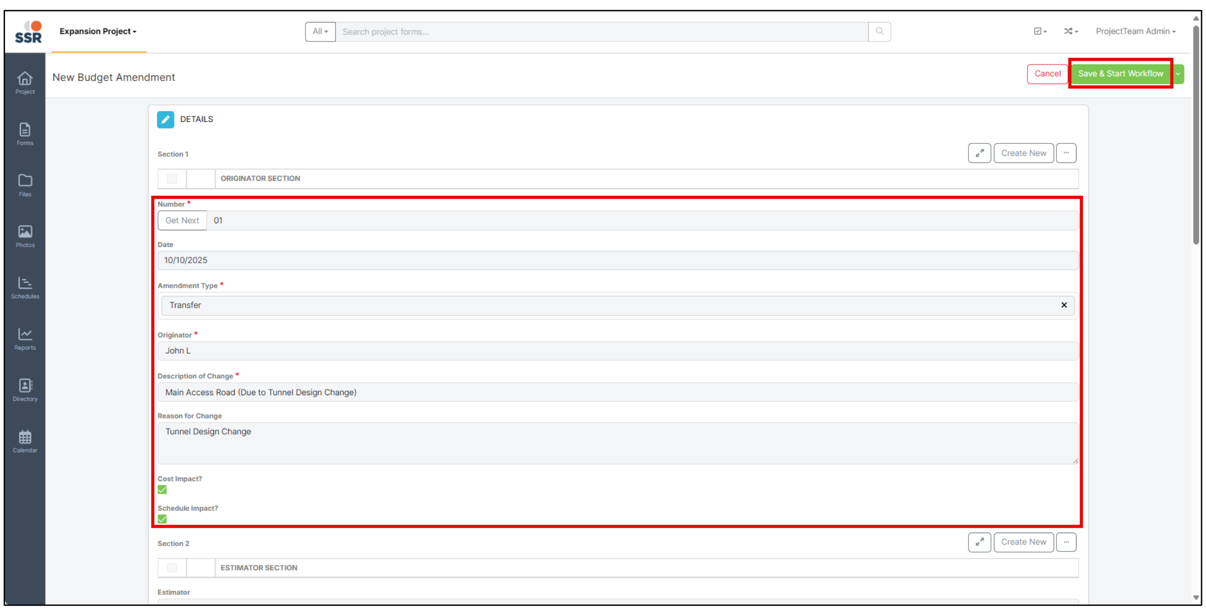
Any SSR project team member can add a Change Notice in the Budget Amendment form.

1) Click the **New** button on the Budget Amendment log view.



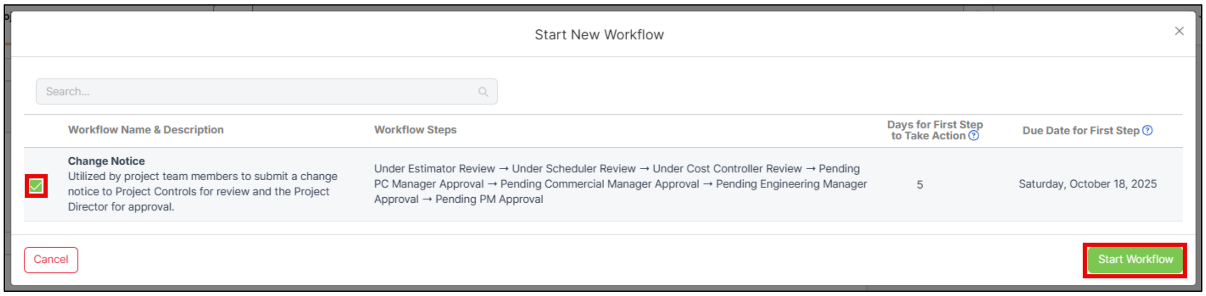
a. Complete the **Originator Section** at the top of the page.
   i. Click **Get Next** to get the next available Number.
   ii. Select the **Date**.
   iii. Select the **Amendment Type**.
   iv. Select the **Originator**.
   v. Enter a **Description of Change**.
   vi. Enter the **Reason for Change**.
   vii. Check **Cost Impact?**, if applicable.
   viii. Check **Schedule Impact?**, if applicable.

b. **Save & Start Workflow**.



c. Select the **Change Notice Workflow**.

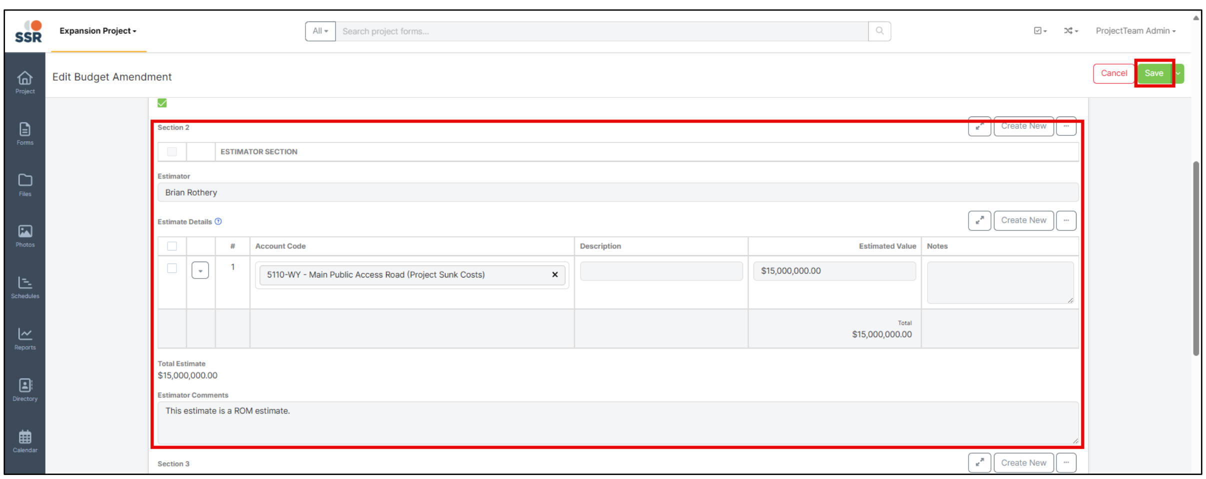
d. **Start Wokflow** to send to the Estimator for Review.



REVIEW THE CHANGE NOTICE

As the workflow moves through the review process, the users in the applicable role will receive a notification email with instructions to review the Change Notice, edit the applicable fields, and then pass the workflow step to send to the next reviewer. Failing a workflow step allows you to select which step to return it to; use Notes to document the justification of the failed step.

1) **Estimator:**
   a. **Review** the Originator Section.
   b. Click **Edit** to open the fields in the Estimator Section.
   c. **Complete** the open fields.
      i. Select the **Estimator**'s name.
      ii. Click **Create New** at the top of the **Estimate Details** collection.
      iii. Enter **Estimator Comments.**
   d. **Save** the record.



   a. Click **Take Action** from the top of the page or from the **Workflows** section of the form.

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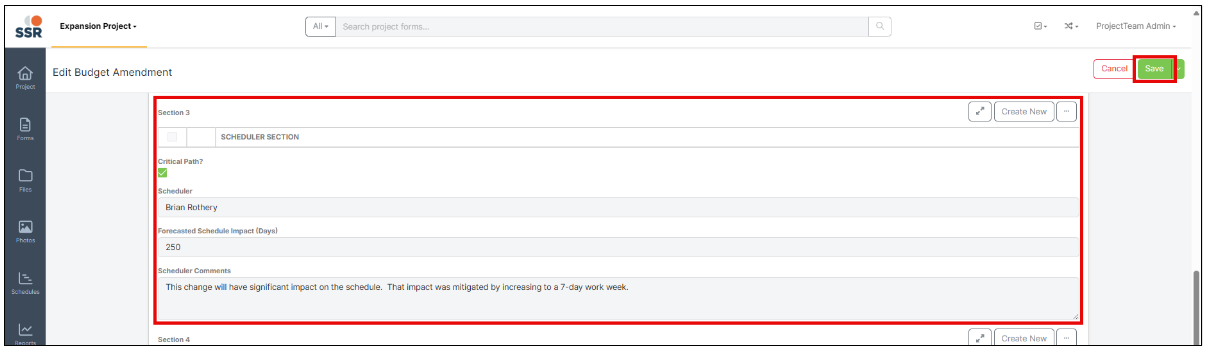
   b. **Pass** the workflow step to send to the Scheduler for review.

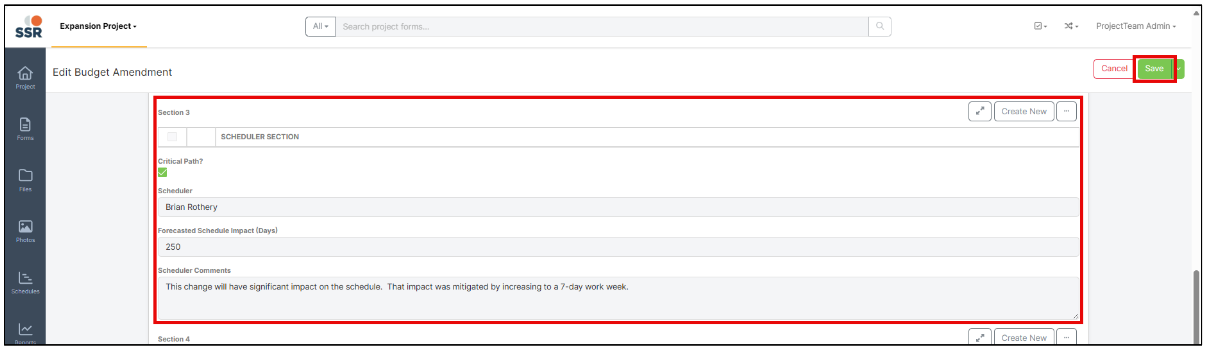
2) **Scheduler:**
   a. **Review** the Originator and Estimator Sections.
   b. Click **Edit** to open the fields in the Scheduler Section.
   c. Complete the open fields.
      i. Check **Critical Path?**, if applicable.
      ii. Enter the **Scheduler**.
      iii. Enter the **Forecasted Schedule Impact (Days)**.
      iv. Enter **Scheduler Comments**.
   d. **Save** the record.



   e. Click **Take Action** from the top of the page or from the Workflow section of the form.

   f. **Pass** the workflow step to send to the Cost Controller for review.

3) **Cost Controller:**
   a. **Review** the Originator, Estimator, and Scheduler Sections.
   b. Click **Edit** to open the fields in the Cost Control Section.
   c. **Complete** the open fields.
   d. **Save** the record.



a. Click **Take Action** from the top of the page or from the **Workflow**s section of the form.
b. **Pass** the workflow step to send to the PC Manager for approval.

APPROVE THE CHANGE NOTICE

As the workflow moves through the approval process, the users in the applicable role will receive a notification email with instructions to review the Change Notice and then pass the workflow step to approve the change. Failing a workflow step allows you to select which step to return it to; use Notes to document the justification of the failed step.

1) **Project Control Manager:**
   a. **Review** each section of the record.
   b. Click **Take Action** from the top of the page or from the **Workflow**s section of the form.

   c. **Pass** the workflow step to send to the Commercial Manager for Approval.

2) **Commercial Manager:**
   a. **Review** each section of the record.
   b. Click **Take Action** from the top of the page or from the **Workflow**s section of the form.

c. **Pass** the workflow step to send to the Engineering Manager for Approval.

3) **Engineering Manager:**

a. **Review** each section of the record.

b. Click **Take Action** from the top of the page or from the **Workflow**s section of the form.

c. **Pass** the workflow step to send to the Project Manager for final Approval.

4) **Project Manager:**

a. **Review** each section of the record.

b. Click the **Approve Budget Amendment** button at the top of the page.

i. This will **lock** the **Cost Control Allocation** collection in the Cost Controller Section.

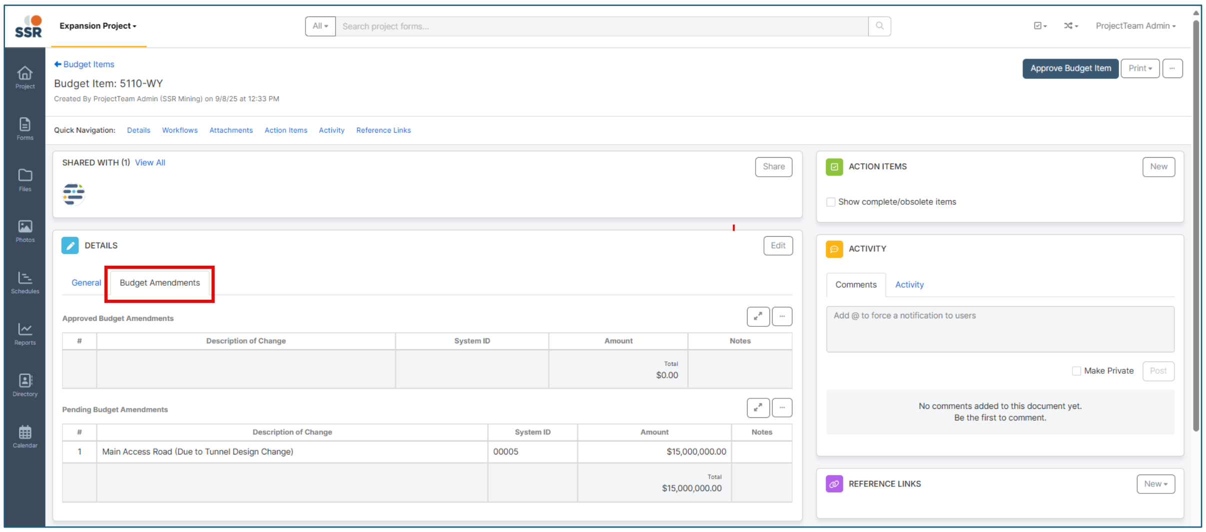
c. Click **Take Action** from the top of the page or from the **Workflow**s section of the form.

d. **Pass** the workflow step to complete the workflow.

i. Originator will be **notified** that the workflow is complete.

VIEW CHANGES TO THE BUDGET ITEM

1) Change amounts appear in the Budget Amendments tab of the **Budget Item**.
    a. Changes will start in **Pending Budget Amendments**. When the Project Manager clicks the **Approve Budget Amendment** button the change is moved to **Approved Budget Amendments**.



2) These amounts are pulled from **Cost Control Allocation** that is entered by the Cost Controller in the Budget Amendment form.

Cost Control Allocation

#	Account Code	Amount	Notes
1	5110-WY - Main Public Access Road (Project Sunk Costs)	$15,000,000.00	
2	9110-YA - Contingency CAPEX (Contingency)	($15,000,000.00)	
		Total $0.00	

RELATED RESOURCES

Related QRGs:

Budget Items

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