



Change Orders

AASHTOWare Project Construction and Materials™
rev. April 2023

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Introduction

AASHTOWare Project™ (AWP) is a web-based program consisting of several modules designed to electronically allow the SCDOT to manage the entire lifecycle of construction contracts using a standardized format while providing a collaborative environment.

AASHTOWare Project Construction and Materials™ (PrCM) is a module designed to support the complete construction and materials management process.

Change Orders

A Change Order is a modification to the original contract. They can be created for a variety of reasons: new items may need to be added to the contract, existing items may need to be increased or decreased, changes may need to be made to contract documentation, or the completion date may need to be adjusted.

Roles that can create a Change Order in AASHTOWare Project:

- PROJ ENG
- ARCE
- RCE

Creating a Change Order

1. Select Contract Progress



Figure 1 – Contract Progress

2. Select the Contract that requires a Change Order.

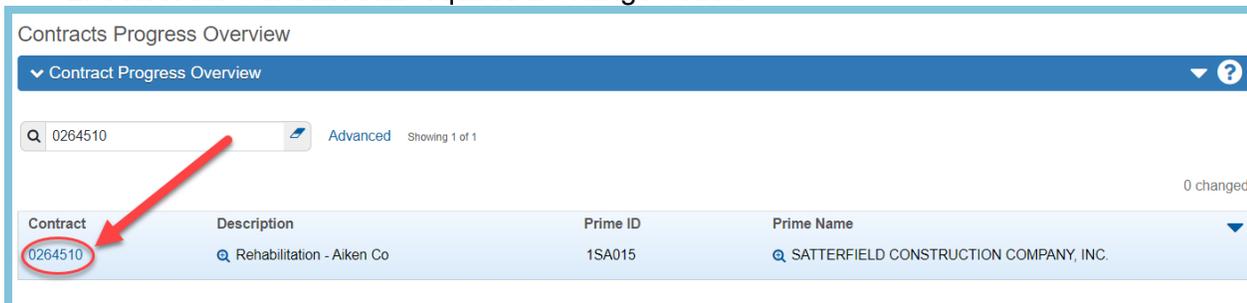


Figure 2 – Select Contract

3. Select the Change Orders tab and click the Add button.

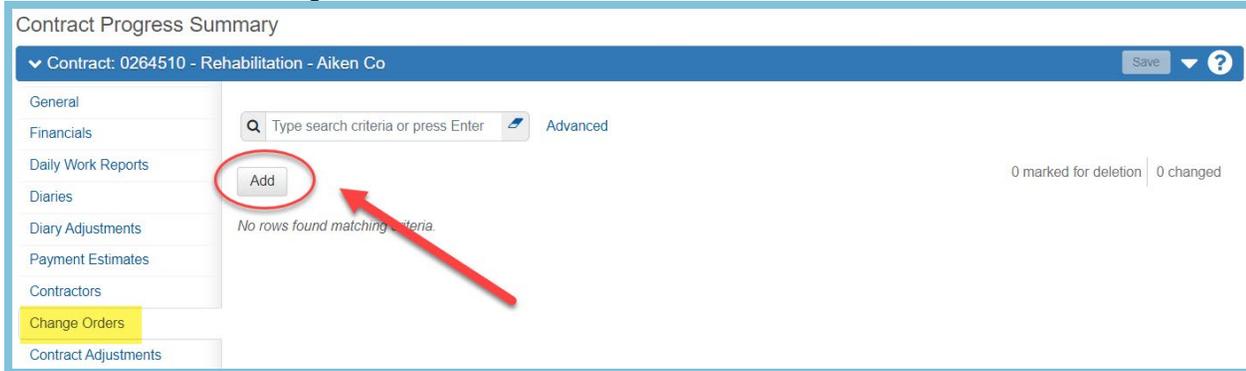


Figure 3 – Change Orders Tab

Change Order General Tab

1. Enter the Change Order Date, the Description, Change Order Type, and Reason.
2. Click **Save**.

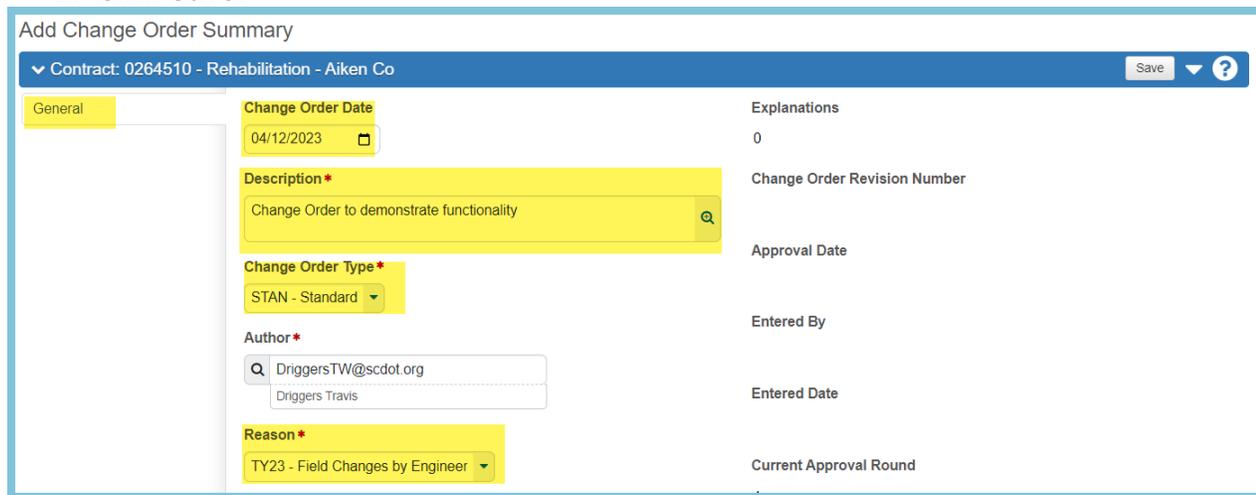


Figure 4 – Change Orders General Tab

After saving, the Change Order Explanation section will display along with many new tabs.

A Change Order explanation is required.

3. Enter an Order number.
This number determines the order in which explanations will be displayed on the Change Order Report. If applicable choose a Reference Explanation Name. This field can be left blank if necessary. In addition, you can enter a Supplemental Explanation. This explanation can be used in conjunction with the Reference Explanation, or it can be used separately.
4. Enter Change Order Explanation
5. Click **Save**.

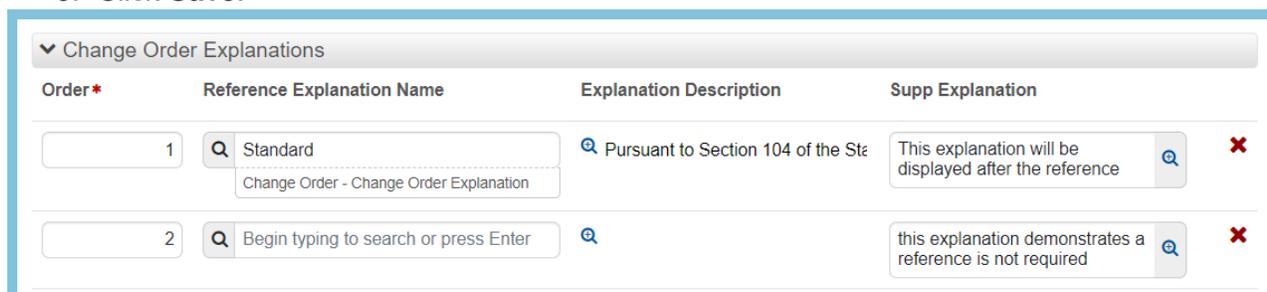


Figure 5 – Change Orders Explanations

The explanations can be expanded using the magnifier to make data entry easier.



Figure 6 – Change Orders Explanations Magnifier

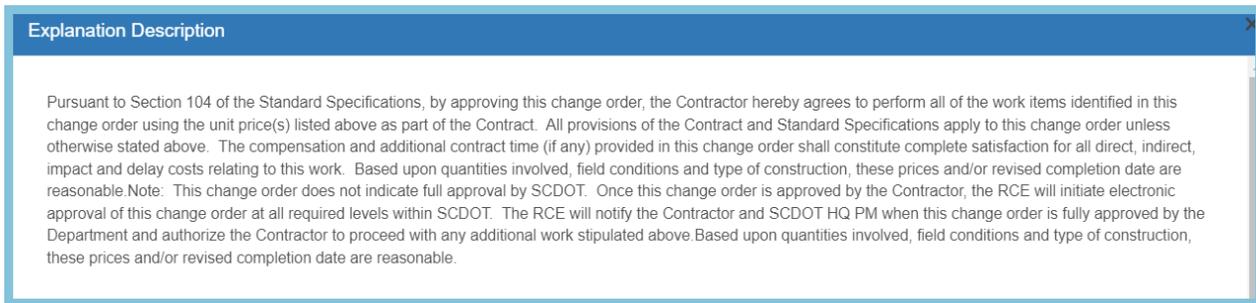


Figure 7 – Change Orders Explanation Description

Change Order Increase/Decrease Items Tab

If a Change Order calls for increase/decrease to existing contract items. This is the tab that must be used.

Increase/Decrease Existing Items

To increase/decrease existing contract items:

1. Select the Increase/Decrease Items tab and click the Select Items button

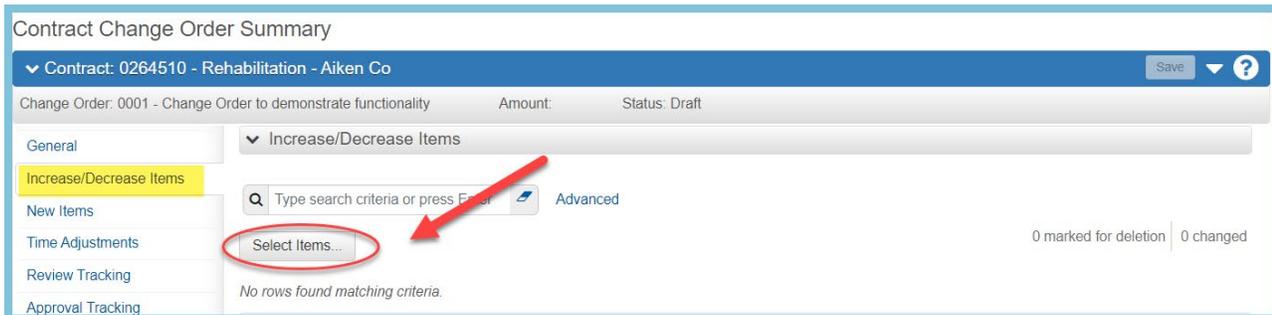


Figure 8 – Change Orders Increase/Decrease Tab

2. If necessary, select Show First 10 to display the contract items.
3. Select all contract items that need to be increased or decreased. The search box, project filter, and category filter can help you locate the items.
4. Select the Add to Change Order button.

Cont Item Ln Num	Proj Ln Num	Proj - Cat	Item - Descr	Suppl Descr	Unit	Item Src
0080	0060	P041799/1	4011004, LIQUID ASPHALT BII		TON - Ton	Original
0150	0090	P041799/1	4030350, HOT MIX ASPHALT :		TON - Ton	Original
0120	0080	P041799/1	4013990, MILLING EXISTING /		SY - Square Y	Original

Figure 9 – Add Increase/Decrease Item

5. Once added, use the expand/collapse tool to expand the first item.

Proj Ln Num	Proj - Cat	Item - Descr	Pending CO Qty
0060	P041799 - 1	4011004 - LIQUID ASPHALT BII	0.000
Curr Qty		Curr Ext Amt	Qty Posted to Dt Appr DWRs
47.343	35,033.82	0.000	0.000
0090	P041799 - 1	4030350 - HOT MIX ASPHALT :	0.000
728.340		49,090.12	0.000

Figure 10 – Expand Increase/Decrease Item

6. Enter the Quantity. In addition, an explanation can be entered for each item but is not required.

Proj Ln Num	Proj - Cat	Item - Descr	Pending CO Qty
0060	P041799 - 1	4011004 - LIQUID ASPHALT BII	0.000
▼ Curr Qty	Curr Ext Amt	Qty Posted to Dt Appr DWRs	Qty Posted to Dt
47.343	35,033.82	0.000	0.000

Quantity * Amount

Unit Price: 740.00000

▼ Change Order Increase/Decrease Items Explanations

Order *	Explanation	Synched
<input type="text"/>	<input type="text"/>	<input type="text"/>

Figure 11 – Increase/Decrease Item Data

7. When finished, use the expand collapse tool to minimize the item. Repeat the steps for each additional item.

8. Click **Save**.

The current Change Order amount will be displayed in the header.

Contract Change Order Summary

▼ Contract: 0264510 - Rehabilitation - Aiken Co Save ?

Change Order: 0001 - Change Order to demonstrate functionality Amount: 12,898.00 Status: Draft

▼ Increase/Decrease Items

Proj Ln Num	Proj - Cat	Item - Descr	Pending CO Qty
0060	P041799 - 1	4011004 - LIQUID ASPHALT BII	0.000
> 47.343	35,033.82	0.000	0.000
Proj Ln Num	Proj - Cat	Item - Descr	Pending CO Qty
0090	P041799 - 1	4030350 - HOT MIX ASPHALT :	0.000
> Curr Qty	Curr Ext Amt	Qty Posted to Dt Appr DWRs	Qty Posted to Dt
728.340	49,090.12	0.000	0.000

Figure 12 – Increase/Decrease Item Data

Balance Completed Items

Balancing completed items is a useful tool to clear item overruns and to balance all items before the final estimate.

The system automatically calculates what quantity is needed to give the item a quantity of 0 remaining.

This process requires a user to change the status of contract item to complete.

However, this status does not prohibit the item from being posted to a DWR. In addition, the item status can simply be changed back to not complete at any time.

Scenario 1: An item has an overrun of 160 tons of Surface Type C. By marking the item complete and adding it the Change Order, the system will automatically add 160 tons to the item. This balances the item. There is no longer an overrun and the item will have a quantity of 0 remaining. This will increase the Change Order amount unless additional items are balanced to help recover the amount.

Scenario 2: A contract was completed but mowing of .5 acres was not utilized. By marking the item complete, the system will deduct .5 acres from the item. This balances the item, and the item will have a quantity of 0. The additional funds can be used to recover the amount used in Scenario 1 or it can simply decrease the current contract amount.

This is extremely useful to balance multiple items automatically.

By balancing all items at the end of the contract, this will reconcile all existing items.

The Contract Items Component is located on the quick links from within the Contract Administration Component. The link is also located from within the Change Order.

1. Click the Items quick link at the top of the screen.

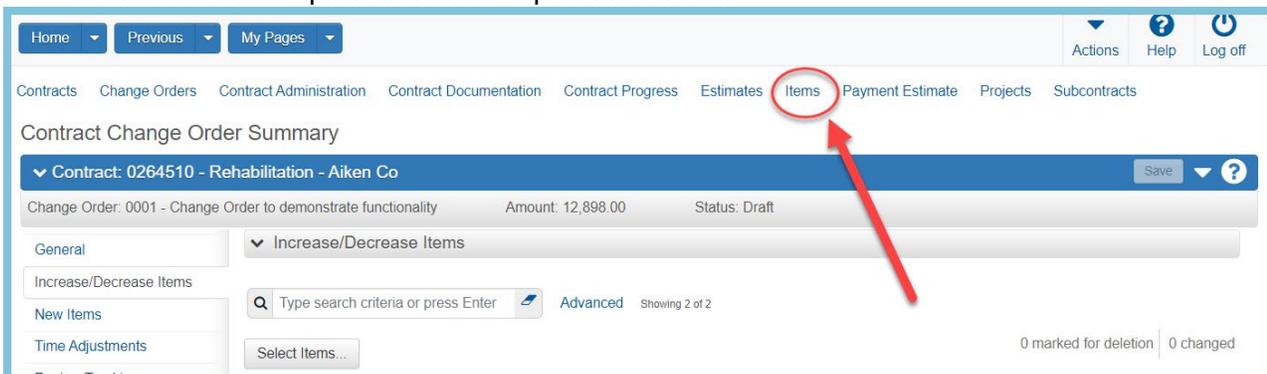


Figure 13 – Contract Items

2. On the Component Action Menu, Select Mark Items Complete.

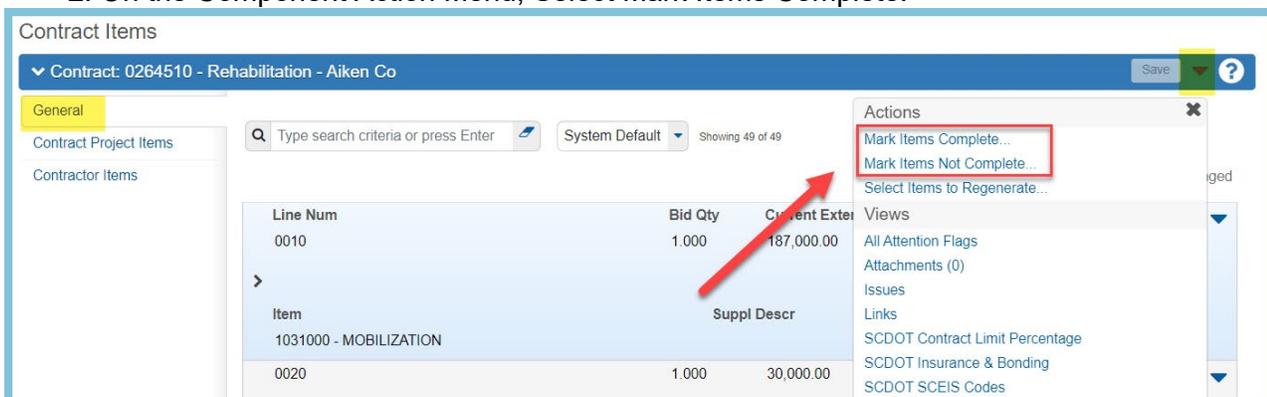


Figure 14 – Mark Items Complete

3. Select one or more items to mark as complete. The select All feature can be used to select all items. The filter can be used to help search for items.
4. Click the Mark Items Complete button. *(This same method can be used to Mark Items Not Complete)*

Select Items

Q pave Advanced Showing 6 of 6

Select: All None 2 selected

Line Num	Item	Descr	Unit
0050	2023000	REMOVAL & DISPOSAL OF EXISTING PAVEMENT	SY - Square Yard
0110	4013200	MILLING EXISTING ASPHALT PAVEMENT 2.0"	SY - Square Yard
0120	4013990	MILLING EXISTING ASPHALT PAVEMENT (VARIABLE)	SY - Square Yard
✓ 0400	6300005	PERMANENT CLEAR PAVEMENT MARKERS- MONO-DIR - 4"X4"	EA - Each
✓ 0410	6301005	PERMANENT YELLOW PAVEMENT MARKERS MONO-DIR - 4"X 4" PERM. YE	EA - Each
0420	6301100	PERMANENT YELLOW PAVEMENT MARKERS BI-DIR - 4"X4"	EA - Each

Mark Items Complete

Figure 15 – Select Items to Mark Complete

5. Using the previous selector, navigate back to the Change Order
6. Click the Increase/Decrease tab.
7. Select the Balance Completed Items button.

Contract Change Order Summary

Contract: 0264510 - Rehabilitation - Aiken Co Save ?

Change Order: 0001 - Change Order to demonstrate functionality Amount: 12,898.00 Status: Draft

General

Increase/Decrease Items

New Items

Time Adjustments

Review Tracking

Approval Tracking

Balance Completed Items

Q Type search criteria or press Enter Advanced

Balance Completed Items...

No rows found matching criteria.

0 marked for deletion | 0 changed

Figure 16 – Balance Completed Items

8. Select the completed items to add to the Change Order. (Only items previously marked complete will be available to select)
9. Click the Balance Completed Items button.

Balance Completed Items

Type search criteria or press Enter Advanced Showing 2 of 2

Select: [All](#) | [None](#) 2 selected

Contract Item Ln Num	Item - Description	Supp Descr	Unit	Item Src
0400	6300005, PERMANENT CLEAR PAVEMENT MAF		EA - Each	Original
0410	6301005, PERMANENT YELLOW PAVEMENT M/		EA - Each	Original

[Balance Completed Items](#)

Figure 17 – Select Items to Balance

10. The system automatically adds or deducts quantities to balance the items.
11. Click **Save**.

Contract: 0264510 - Rehabilitation - Aiken Co Save ?

General

Increase/Decrease Items

New Items

Time Adjustments

Review Tracking

Approval Tracking

Increase/Decrease Items

Balance Completed Items

Type search criteria or press Enter Advanced Showing 2 of 2

Balance Completed Items... 0 marked for deletion 0 changed

Proj Ln Num	Proj - Cat	Item - Descr	Pending CO Qty
0400	P041562 - 1	6300005 - PERMANENT	0.000
<input checked="" type="checkbox"/> Curr Qty	Curr Ext Amt	Qty Posted to Dt App...	Qty Paid to Dt
15.000	123.75	0.000	0.000

Change Quantity **Change Amount**

-15.000 -123.75000000

Unit Price

8.25000

Change Order Increase/Decrease Items Explanations

Order *	Explanation	Synched
0410	P041562 - 1	6301005 - PERMANENT
14.000	115.50	0.000

Figure 18 – Save Balanced Completed Items

Change Order New Items Tab

Add New Items

This allows a user to add a new items that do not exist on the current contract or add an existing reference item with a new contract item number.

1. Select the New Items tab and click the Select New Item button

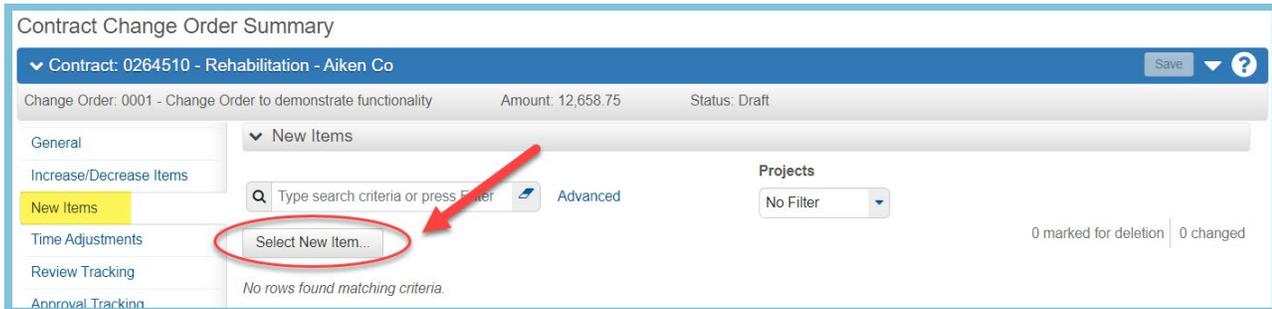


Figure 19 – New Items Tab

2. In the Reference Item field, search for the new item.
3. Once located, choose the correct Projects/Categories to add the item. You can also use the Select All button to add to all.
4. Click the Add to Change Order button.

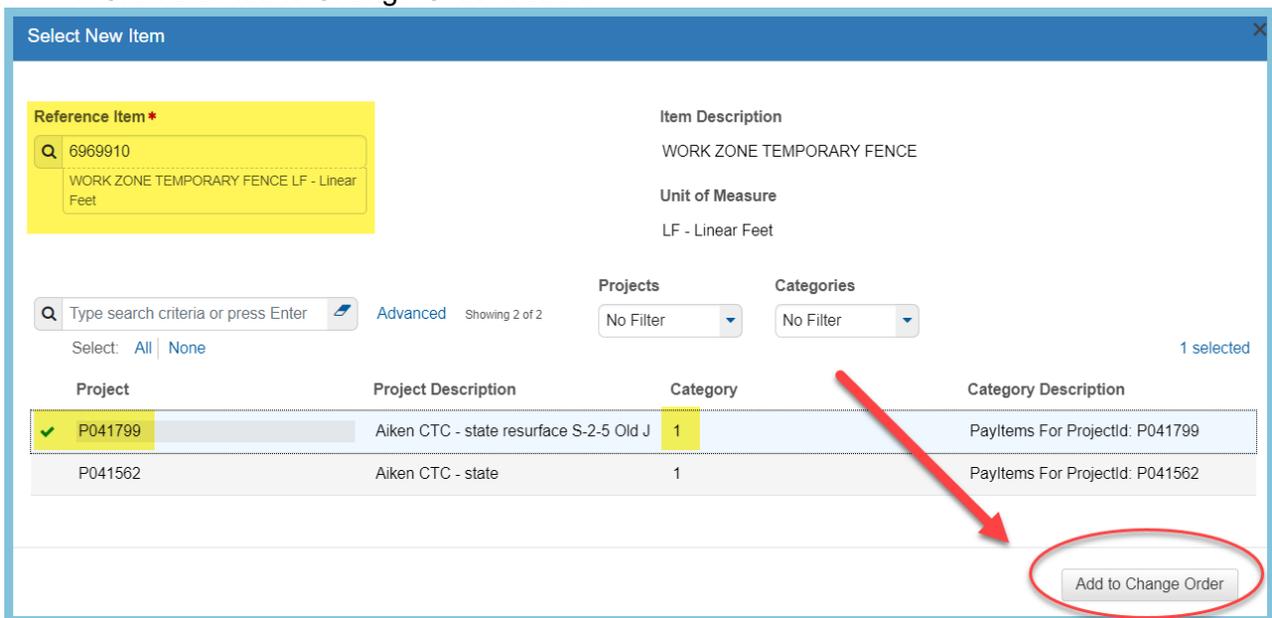


Figure 20 – Select New Items

The system will automatically assign the new item a Project and Contract Line Number. These numbers can be changed if needed.

5. Enter the Quantity, Unit Price, and Funding. A Supplemental Description is optional but should be used for generic Change Order items.
6. Click **Save**.
7. Repeat these steps as many times as needed to add additional new items.

The screenshot shows the 'New Items' form. At the top, there is a search bar and a filter dropdown set to 'No Filter'. Below this is a table with columns: Proj Item Ln Num, Cont Item Ln N..., Item - Descr, Supp Descr, and Unit. The table contains one row with the following data: Proj Item Ln Num: 500, Cont Item Ln N...: 500, Item - Descr: 6969910 - WORK ZONE, Supp Descr: (blank), Unit: LF - Linear Feet. Below the table, there are several input fields: 'Project Item Line Number' (500), 'Contract Item Line Number' (500), 'Quantity' (125.000), 'Unit Price' (20.00000), 'Extended Amount' (2,500.00), 'Supplemental Description' (empty), 'Item Source' (ChangeOrder), and 'Funding' (01 - PROJECT FUND PACKAGE). The form also indicates '0 marked for deletion' and '0 changed'.

Figure 21 – Enter New Item Data

Add New Contract Items

This allows a user to add existing contract items to other Projects/Categories. This is the preferred method to add an existing item to a new project as long as the price matches the original contract item. The instructions are the same as adding a new item except the contract line item number and price are locked to match the original contract item.

The screenshot shows the 'Select Contract Item...' form. At the top, there is a search bar and a filter dropdown set to 'No Filter'. Below this is a table with columns: Proj Item Ln Num, Cont Item Ln N..., Item - Descr, Supp Descr, and Unit. The table contains one row with the following data: Proj Item Ln Num: 510, Cont Item Ln N...: 0100, Item - Descr: 4012080 - FULL DEPTH., Supp Descr: (blank), Unit: SY - Square Yard. Below the table, there are several input fields: 'Project Item Line Number' (510), 'Contract Item Line Number' (0100), 'Quantity' (empty), 'Unit Price' (62), 'Extended Amount' (empty), 'Supplemental Description' (empty), 'Item Source' (Modified Original). The form also indicates '0 marked for deletion' and '0 changed'.

Figure 22 – New Contract Item

Change Order Time Adjustments Tab

The Time Adjustments tab allows a user to modify the current completion date of a Site Time. This includes the main contract time, interim completion dates, and milestones. The Site Time must be activated in order to select it for modification.

1. Select the Time Adjustments tab and click the Select Contract Time button.

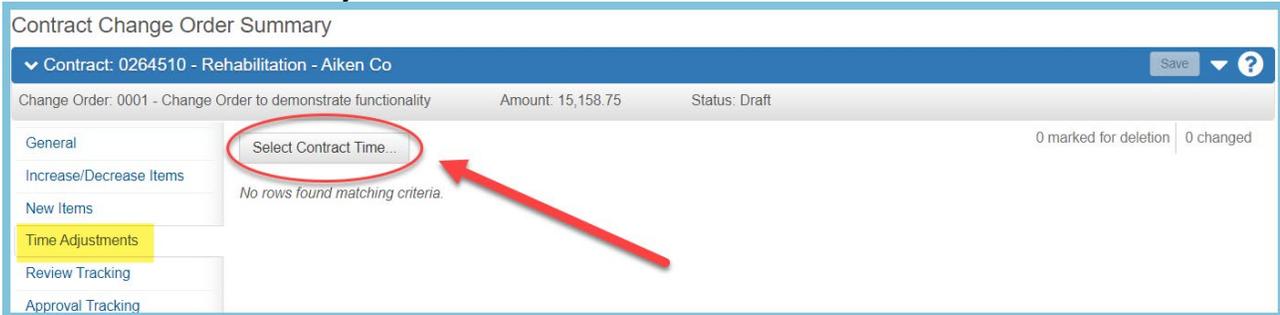


Figure 23 – Time Adjustments Tab

2. Select the Site Time and click the Add Time Adjustments to Change Order button.

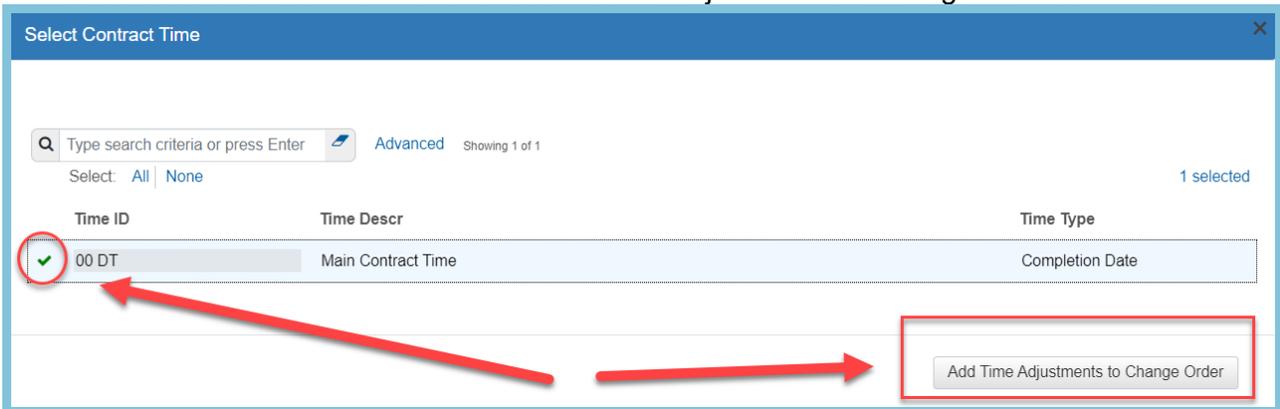


Figure 24 – Select Site Time

From within the Site Time, you have the option to enter a specific date for Adjustment Completion Date or you can enter the number of days in the Adjustment Time Units. Only one field is required. It is beneficial for the adjusted completion date to end at 11:59PM to avoid minor issues. (For example if a completion date is 4-30-23 12:01PM and a payment estimate period end date is 4-30-23 11:59PM, you will get an estimate exception stating the completion date has been exceeded)

3. Enter the Adjustment Time Units and click **Save**.

Figure 25 – Enter Adjusted Completion Date

Change Order Review Tracking Tab

The Change Order Review process is OPTIONAL.

This allows the Change Order creator the option of adding one or more reviewers before the Change Order enters the normal approval process.

These reviewers must review the Change Order.

Once each reviewer has approved the Change Order, it is automatically submitted for approval and placed in Pending Approval status.

If the Change Order is rejected, the change is automatically placed in a Rejected status. It will then need to be changed back to Draft to allow for corrections.

The Change Order Review Process can be canceled by submitting the Change Order for approval before the reviewers have made a decision.

1. Click the Select Reviewers button.

Figure 26 – Select Reviewers

2. Select one or more reviewers to review the Change Order. Users with all contract access and contract authority will be displayed.
3. Click **Save**.

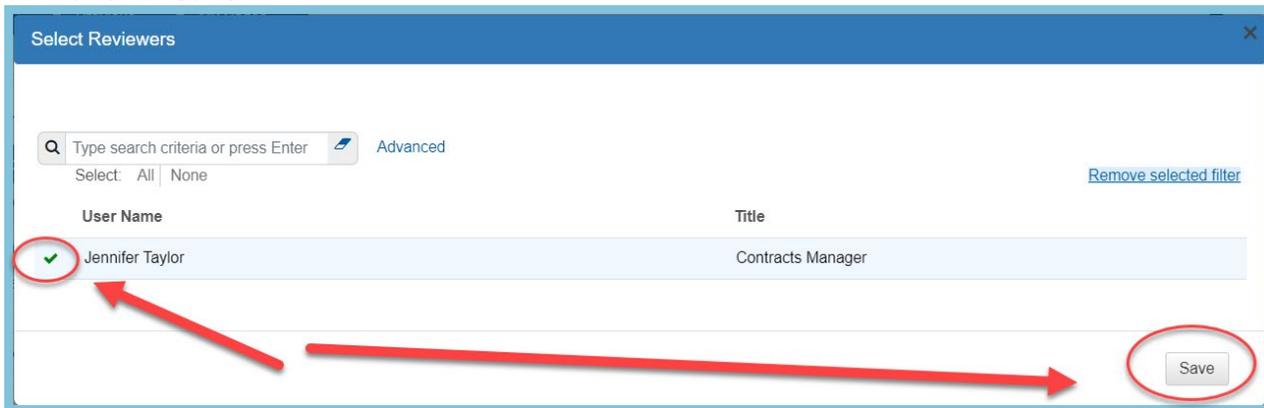


Figure 27 – Add Reviewers

The reviewers will be notified via email that a Change Order is Pending Review and their decision is requested.

4. If a reviewer needs to be canceled, click the Row Action Menu for the reviewer and select Cancel Reviewer.

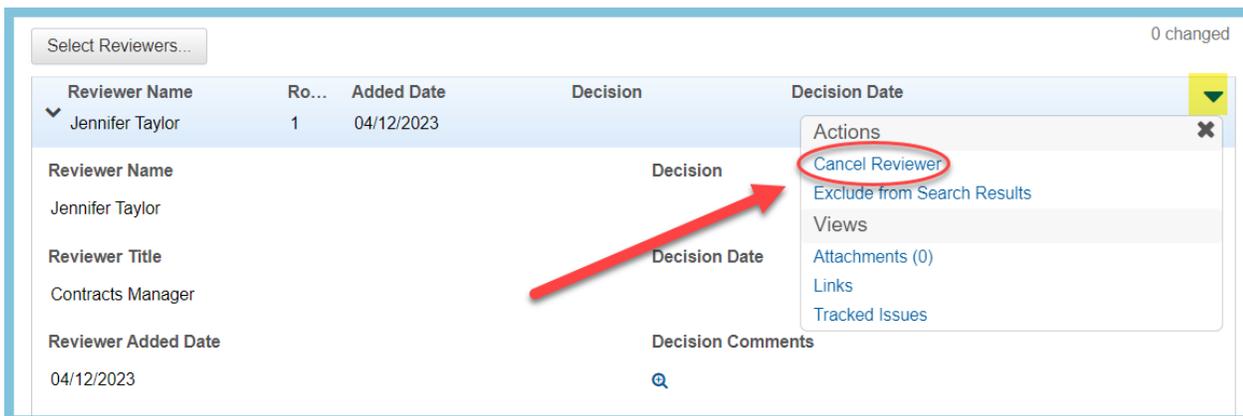


Figure 28 – Cancel Reviewers

5. As a reviewer, click the Row Action Menu to Approve or Reject the Change Order.

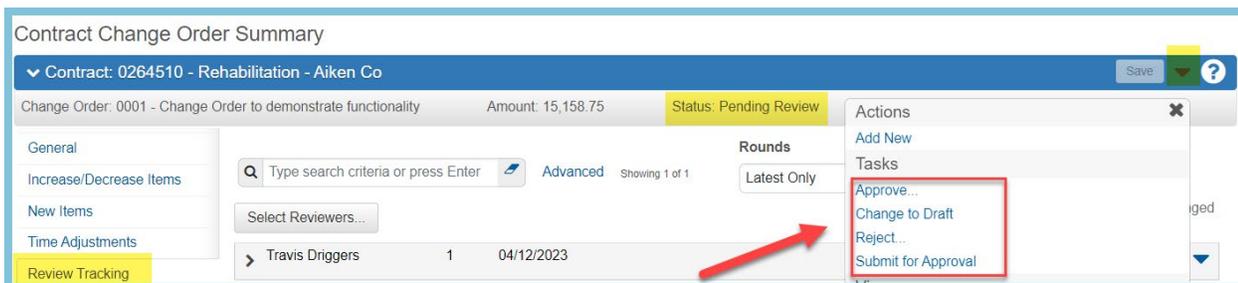


Figure 27 – Review Decision

Submitting a Change Order for Approval

If the review process is completed, the Change Order will automatically be submitted for approval.

Submitting a Change Order for approval can be done without using the review process and instead can be done manually.

1. From the Component Action Menu, select Submit for Approval

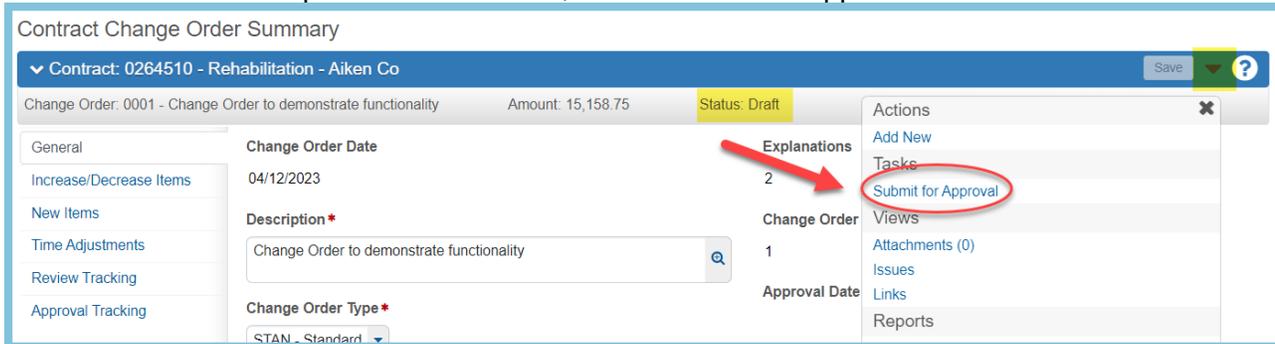


Figure 29 – Submit For Approval

Changing the Change Order Status to Draft

As long as the Change Order status is Pending Approval or Pending Review, the Change Order status can be changed back to Draft to make revisions.

1. From the Component Action Menu, select Change to Draft.

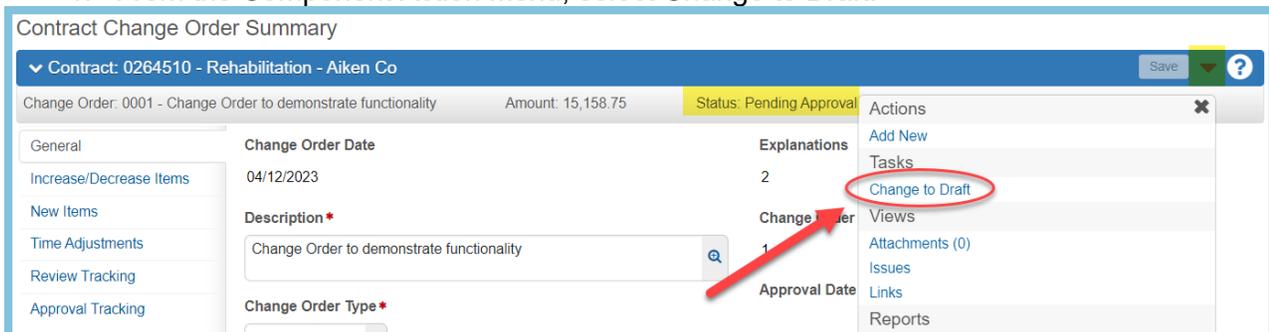


Figure 30 – Change to Draft

Approving / Rejecting a Change Order

Once a Change Order has been submitted for approval, the system will automatically assign approval groups based upon the Change Order type or Change Order amount.

Users are not selected for approval. Any user with an approval role and contract authority can approve.

The first approval group will be notified via email that their approval decision is requested.

If approved, the next approval level will receive an email that their approval decision is requested.

This occurs until the final approval level approves the Change Order. Afterwards, the Change Order will move to an Approved status.

1. From the Component Action Menu, select Approve or Reject.

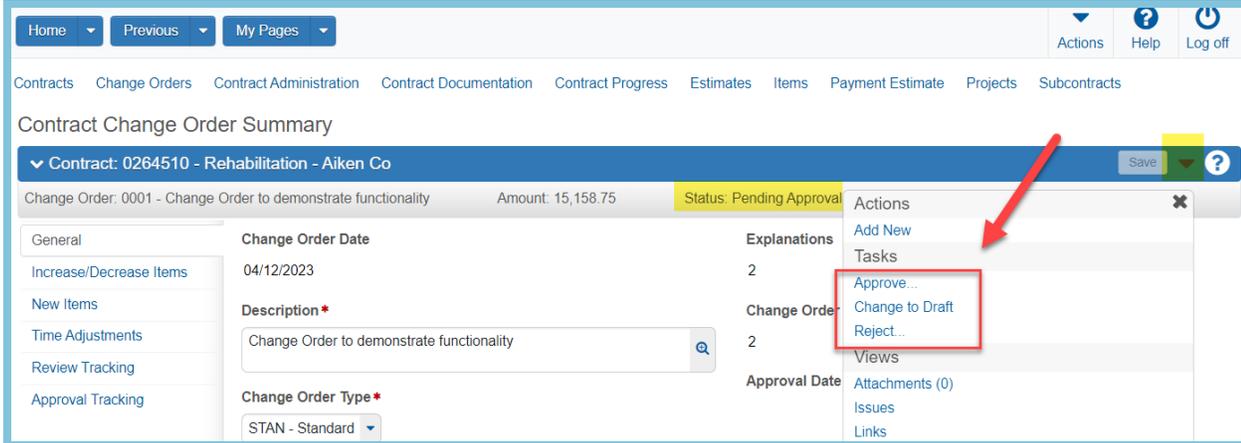


Figure 31 – Change Order Decision

***Once the Change Order status is approved, no changes can be made.**

**In AASHTOWare Project, an approval level can be skipped. If for some reason, an approval group is unable to approve a Change Order, the next approval group will need to be contacted. They can approve the Change Order and bypass the previous level.*

Change Order Approval Tracking Tab

After a Change Order is submitted for approval, a user can track the approval decisions and history from within this tab.

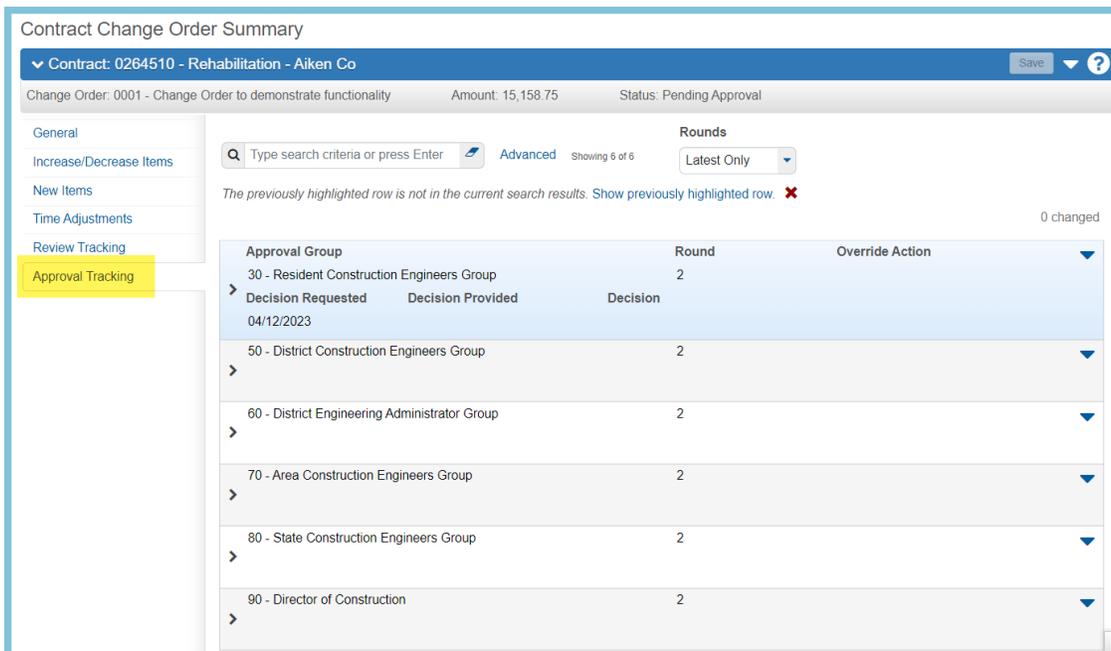


Figure 32 – Approval Tracking Tab

Overriding Approval Rules

If approval rules need to be overridden, please contact your Area Construction Engineer. The Area Construction Engineer can only setup approval rules when a Change Order is in Draft.

Contract Limit Percentage

The system will block the attempt to change the status from Draft to Pending Approval if the total net change (approved and pending) is greater than the total net change allowed. If this happens, contact the Area Construction Engineer to have the Contract Limit Percentage increased.

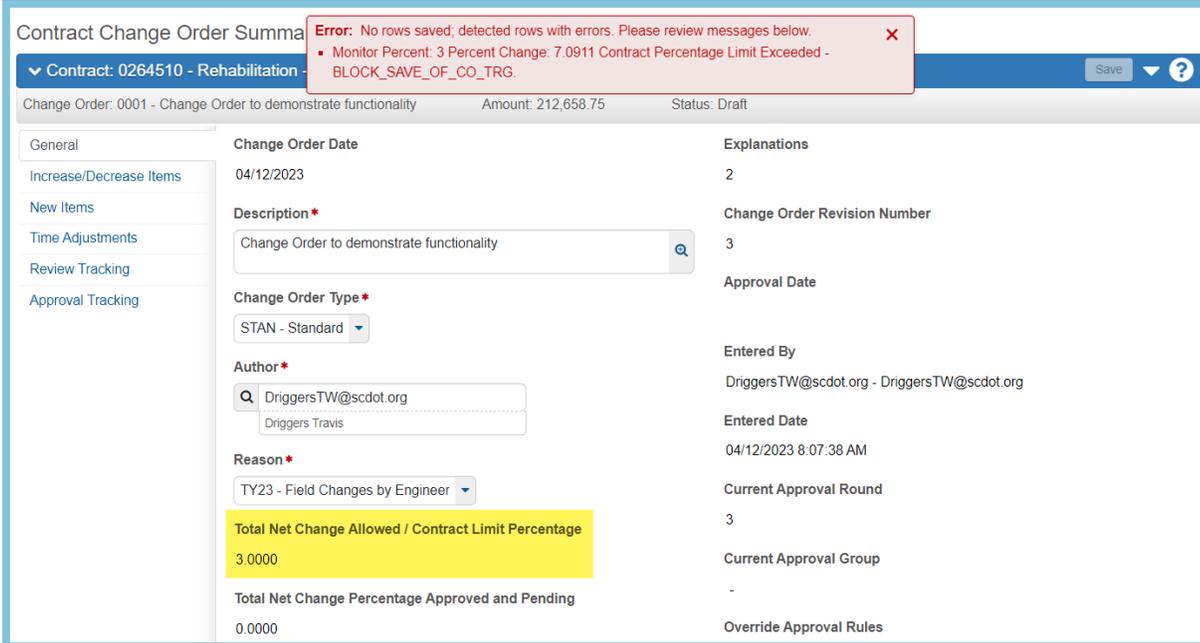


Figure 33 – Contract Limit Percentage

Change Order Report

The Change Order Report can be located in the Component Action Menu under Reports. It can be viewed anytime regardless of the Change Order status. Once approved, a Historical Report will be available.

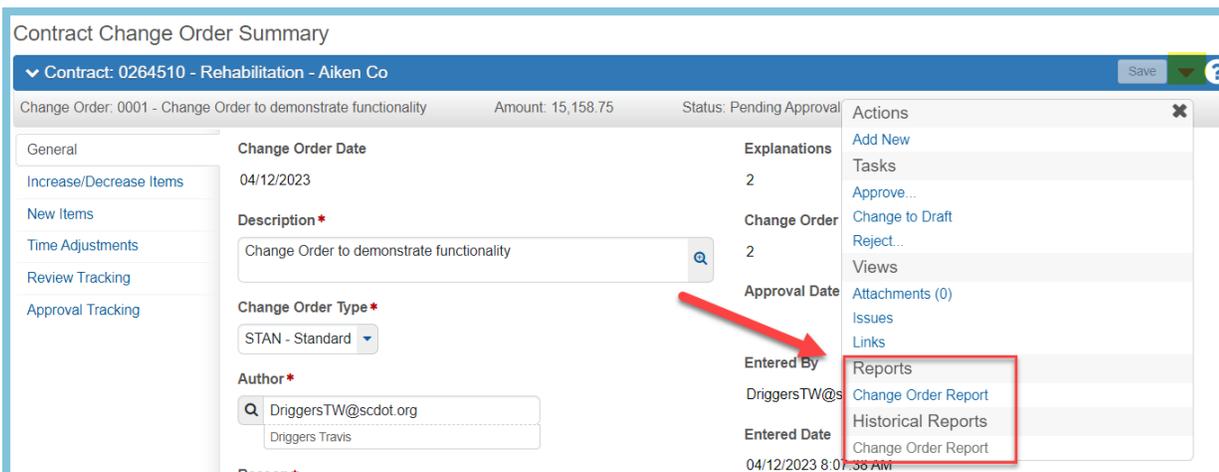


Figure 34 – Change Order Reports



Need Support?

*For all AASHTOWare Project
related support, please contact:*

Construction Support

AWPConstSupport@scdot.org

Materials Support

AWPMaterialsSupport@scdot.org

Additional Support

For training and additional resources please visit

<https://www.scdot.org/business/aashtowareproject.aspx>



South Carolina Department of Transportation