# 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 $2^{nd}$ (or $3^{rd}$, $4^{th}$, etc.) purchase order issued for a contract or Change Order when multiple purchase orders are awarded due to funding splits or phased funding availability and each purchase order issued on a Project needs to have its own appropriate record in ProjectTeam.

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, in order to maintain the project record, facilitate Payment Applications and Invoices, control project finances and for change management purposes.

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:** If a Contract or Change Order awarded to a vendor includes multiple purchase orders, you will need to enter each purchase order as a standalone Change Order to the Contract. A separate PCO for each PO is NOT required for additional POs awarded for a single Contract or Change Order. Use the PCO to create the first Change Order for the lowest numbered PO for the record and manually create each additional Change Order without a PCO.
>
> Please reach out to DGS.ProjectTeam@dc.gov if you need clarification or have any questions.
>
> 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.

## 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 $2^{nd}$ (or $3^{rd}$, 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).
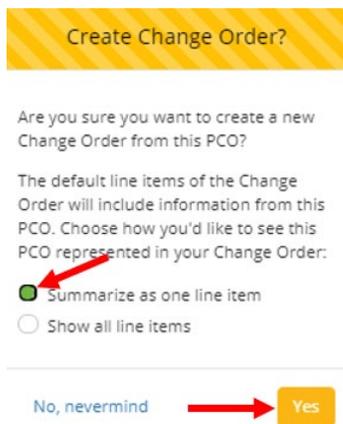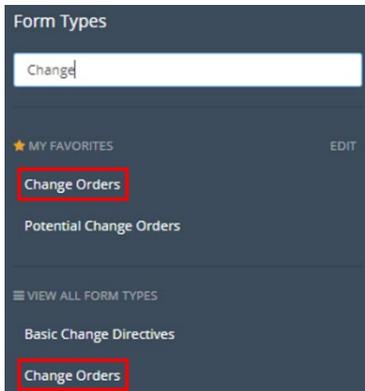


3. Enter the remaining Change Order information as instructed below beginning with Step 5.

**Creating a Change Order from within the Change Orders Form/Log**
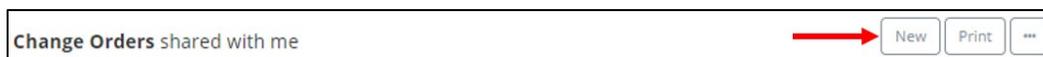
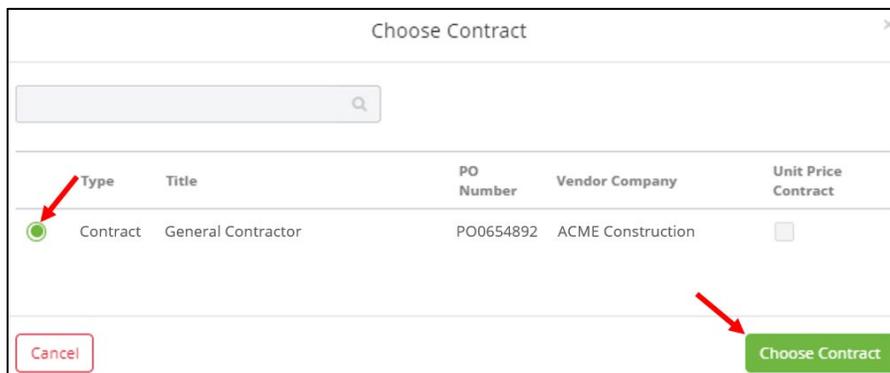1. Within the project, click the **Forms** icon on the left navigation pane.



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

3.  Click on the **New** button



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



5.  In the **General Tab** enter a **Title** for the Change Order. This should be brief but descriptive of what the Change Order is for **and should include the PO Number at the end**. For example, "*Additional Time for Art Installation – PO123456*"



6.  The **Change Order/Modification Number** will populate the next sequential number based on previous Change Orders. The CO/Mod number is listed on the signed CO/Mod awarded by the Contracting Officer. If the auto-numbering is incorrect, determine what is causing the numbering to be off in the system and correct it. You can type a number in this field if necessary.

> **Change Order/Modification Number** * Required

7. Click inside the **Date Issued** and select the date that the Contracting Officer signed the Change Order.

> **Date Issued**

8. 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)**

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

> **Contract Reference** ⑦

10. 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

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

> **To Business**

12. 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. This can be a negative number if time is reuced for the contract.

> **NOTE:** Additional days added to the contract by Change Order extend the FINAL COMPLETION DATE of the contract. If the Change Order changes the Substantial Completion Date and/or Administrative Term Date, but does not change the Final Completion Date, enter "0" days in this field to ensure that the Final Completion Date is not falsely extended.
>
> If entering Change Order(s) for multiple purchase orders that were awarded for a single Contract or Change Order, only enter additional days in the Change Order for the first new purchase order or the additional days will be added to the contract multiple times.

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 ⑦

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.

Cancel | Save & Share ▾

Save & Share
Save
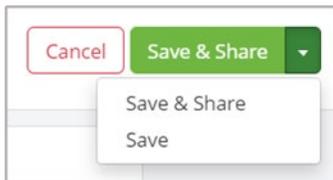
## Change Details Tab

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 it's 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.

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



3.  Select the **PCO(s)** to add.
4.  Set the **Show All Line Items** option based on the needs of the Change Order.
5.  Click **Add**.
6.  **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.
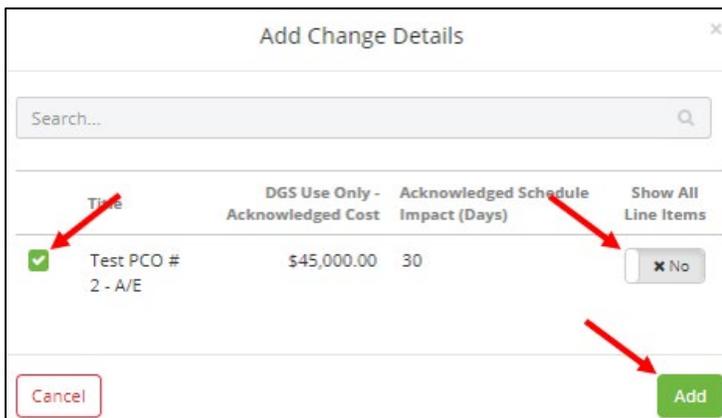


7.  When the Change Order is complete, click **Save** or **Save & Share**.
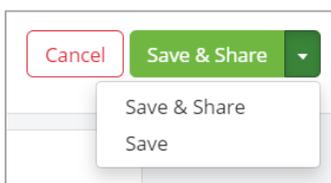
**Attaching Supporting Documentation**

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.