

TCR Training Guide (Mentor)

Date Created: 8/3/2021 Date Updated: 4/1/2022

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About

A Time Change Request (TCR) is submitted by the General Contractor to request a change to the agreed upon time expected to complete an approved job that is underway.

Notes

While the TCR process is consistent for all project types, the terms CM Firm and CM PM are specific to Requirements projects. The CM Firm acts on behalf of the General Contractor and the CM PM is in the role of the Project Officer.

Process Overview

The CM Firm creates a TCR, then processes the TCR to create an Issue. After the estimated cost is determined by the finalized PCO, the CM Firm submits the TCR to the CM PM and SPO for DocuSign approval. If the Estimated Cost is greater than \$25k or the Time Estimate (Consecutive Calendar days) is greater than 15 days, the TCR is sent to CPO for DocuSign approval. If the Estimated Cost is greater than \$100k or the Time Estimate (Consecutive Calendar days) is greater than 30 days, the TCR is sent to VP for approval. Then the TCR is sent to the Scheduling Admin to assign a Scheduler.

The Scheduler creates a recommendation memo which is sent to the CM PM for Issuance to the CM Firm, CPO, Scheduling Director for DocuSign approval. Then the TCR is sent to Scheduling Admin to package and send to COU Senior Director to complete, prompting update of the Proposal in CES.

Workflow Diagram



Time Change Request

Step-by-Step Instructions

Create TCR

Role	I	Preceding Steps		Outcome
CM Firm	\rightarrow	The General Contractor has a request to change the agreed upon time expected to complete an approved job that is underway.	\rightarrow	TCR is created. Issue is created and linked.

Steps

1. Go to 'Project Finder' > Select desired Subproject/Project

Project Finder	C000015851-MC0001 - Q262 Electrical Systems 🧪	SCA In House AEoR – 🗆 🗙
÷	ALL PROJECTS MY PROJECTS RECENT PROJECTS Q	
Project Finder	Requirements > Mentor > TDX > TDX - K&R - DELTA MNTR C15635-C15848 SELECT	
	Number Name	
Apps	→ C000015848-LS0001 K154 Windows 2 ☆ /	
Q Search	→ C000015848-LS0003 K224 Auditorium Upgrade 🌣 🧪	
	→ C000015848-LS0004 K395 Water Heater 😒 🖍	
🛱 Tasks	→ C000015848-LS0002 K678 Pre-K 🔆 🖍	
Messages	→ C000015848-LS0006 K730 New Building 🔆 🖌	
	→ C000015848-LS0005 R030 Masonry ☆ 🖉	
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2. Go to 'Apps' > Select 'TCR'

	Apps			C000015851-MC00	01 - Q262 Electrical Systems 🧳	External REQMT-CM1 SCA CM Firm 1) -		×
		\leftarrow	Q Search	Visit the kStore to explore more than 50 projec	t management apps that work the way you want them to work. Visit the kStore	2			
Ê	Project Finder		Recent	Document Management	Other				
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0			RFIs	Daily Reports	File Manager				
Q	Search		S Expenses	IF IFA	(b) Getting Started				
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3. Select 'New' > Select LLW > Enter TCR information > Click 'Save / Close'

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Q Search		COST
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Tasks	Design Number / Package Number D019286	REVIEWERS
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_	Architect SCA In House AEoR - SCA Sandbox	REFERENCES
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4. Click 'Initiate Issue'

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5. Click 'Start Processing'

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			C10005	8/18/2021	Test 2		INVERSION	SCA In House AEoR - SCA S
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6. Click 'Save / Close'

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0				CI0016		Winter weather delays.	MC00002	SCA GC 1	X097		School Event Delays 4				
				CI0015		Clarification on Drawing M-1.2 - HVAC	MC00002	SCA GC 1	X097		9/8/2021				
				CI0014		Test 4	MC00002	SCA GC 1	X097		Priority Normal				
				CI0013		Clarification on Drawing A-23 - Structural Steel / H	VAC MC00002	- SCA GC 1	X097						
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Update TCR

Role	Preceding Steps		Outcome	
CM Firm	An existing TCR that has not been submitted.	\rightarrow	The TCR is updated.	

Steps

1. Return to the TCR application > Select the desired TCR > Select 'Edit'

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e	Tasks	C10021	8/25/2021	School Event Delays 1	MC00002 - SCA GC 1	X097	P025296	LLW 107409 - TCU REMOVAL 106809 - CTF ROOM CONVERSION REVI	IEWERS
P	Messages	C10020	8/24/2021	School event caused delay	MC00002 - SCA GC 1	X097	P025296	Architect SCA In House AEoR - SCA COM Sandbox	IMENTS
TO	700	1 00019	8/24/2021	School event delay	MC00002 - SCA GC 1	X097	P025296	Contractor AJ Kuhn - AJCo MEP	ERENCES
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2. Navigate to the 'REFERENCES' Section > Select 'UPLOAD' > Upload the appropriate TCR support documentation > Click 'Save / Close'

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Submit TCR



Step

Select the TCR application > Select the desired TCR > Click 'Submit' Note: The Estimated Cost field must be filled from the CES integration before the CM Firm can submit.

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Ê	Tasks		C10021	8/25/2021	School Event Delays 1	MC00002 - SCA GC 1	X097	P025296	106899 - CTF ROOM REVIEWERS									
P	Messages		C10020	8/24/2021	School event caused delay	MC00002 - SCA GC 1	X097	P025296	Architect SCA in House AEoR - SCA COMMENTS Sandbox									
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DocuSign TCR - CM PM, SPO, CPO



Steps

1. Go to email account > Select email > Select 'REVIEW DOCUMENT'

TCR Cl0003 Appi	TCR Cl0003 Approval Task on Q262 Electrical Systems Intex ×			•	Ø
External REQMT-CM1-PM to External 🖛	12:56 PM (1 minute ago)	☆	*	:	
	DocuSign				
	External REQMT-CM1-PM sent you a document to review and s	ign.			
	External REQMT-CM1-PM nycsca.kahua.CMFirm1+PM@gmail.com				
	Please review Time Change Request and render your decision.				

2. Check the 'I agree to use electronic records and signatures' box (only if first time using DocuSign) > Click 'CONTINUE'

Please Review & Act on	These Documents	DocuSign
External REQMT-CM1-PM NYCSCA Best Practices Demo (D		
Please review Time Change Request and r	ender your decision.	
Please read the Electronic Recom	d and Signature Di 1 Ig. CONTINUE	OTHER ACTIONS -
	through 20OCT2020	
FIELDS	The SCA Scheduling Unit recommends extending contract substantial completion a total of 204 Calendar days with 204 days considered for documented general condition costs associated with	
✔ Signature	the COVID 19 Construction Pause (as detailed below). Additionally, 4 ccds attributed to Delayed Mobilization will be held as an SCA management reserve. This reserve may be used by the SCA	
eignature	to offset additional general condition costs associated with future impacts, submitted in	
DS Initial	recommendation for the assessment of liquidated damages.	

3. Click 'Sign' on the appropriate signature line > Click 'FINISH' Note. The image shows the steps for the CM PM. The steps for the SPO and CPO are the same.

Please review the documents below.		2	FINISH OTHER ACTIONS +
	Q Q 🛂 🖶 Ø		Ľ
	(Co Cal	nsecutive endar Days):	•
START	You are directed to proceed with the following work.		
	DESCRIPTION OF WORK		
	By: Signature of CM PM/ PO <u>12/27/2021</u> Date		
	By: Signature of SPO Date	_	
	By: Signature of CPO Date	_	

4. You may be presented with the following box to Adopt your signature. Select your preferences > Click 'ADOPT AND SIGN'

Adopt Your Signature	×
Confirm your name, Initiale, and algorature. * Required	
Full Name*	Initials*
SELECT STYLE DRAW UPLOAD PREVIEW	Change Style
Bortunal EXT-GC-1 EE	
By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature to the same as	signature and initials for all purposes when I (or gnature or initial.
ADOPT AND SIGN CANCEL	

Decline DocuSign TCR – CM PM, SPO, CPO

Role		Preceding Steps		Outcome
CM PM, SPO		The TCD is submitted for		The TCD is returned to the CM
CPO: when the estimated cost is over \$25K or the time estimate is over 15 days	\rightarrow	acceptance.	\rightarrow	Firm for resubmit.

Steps

1. Go to email account > Select email > Select 'REVIEW DOCUMENT'

TCR Cl0003 Appr	oval Task on Q262 Electrical Systems Index ×			•	Ø
External REQMT-CM1-PM v to External 🖛	External REQMT-CM1-PM via DocuSign <dse_demo@docusign.net> o External ▼</dse_demo@docusign.net>				:
	DocuSign				
	External REQMT-CM1-PM sent you a document to review and s	ign.			
	External REQMT-CM1-PM nycsca.kahua.CMFirm1+PM@gmail.com Please review Time Change Request and render your decision.				

Click 'Other Actions' > 'Click Decline to Sign'
 Note. The image shows the steps for the CM PM. The steps for the SPO and CPO are the same.

Please Review & Act on These Documents

External REQMT-CM1 SCA Sandbox (Development-DEVPRODUCTION-11/18/2021 9:57:02 PM)

Please review Time Change Request and render your decision.

Please review the documents below.						CONTINUE	OTHER ACTIONS +
Ĭ	TITLE: TO :	tcr test 3 External REQMT-CM1		DESIGN NO: LLW NO:	P025950 111942 - ADDITION	8 Finish Later	
					122064 - EXISTING SCHOOL RENOVATION WORK	Print & Sign	
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-						View Electronic I Disclosure	Record and Signature
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в	Sış By:	gnature of CM PM/ PO	Date				
	Sig	gnature of SPO	Date				

3. Click 'Continue'

Please Review & Act on These Documents				DocuSign
External REQMT-CM1 SCA Sandbox (Development-DEVPRODUCT	Caution		×	
Please review Time Change Request and render your	If you select CONTINUE, this document will be voided.	and contract the condex directly with your		
Please review the documents below.	request. You can exit signing and save the information you've entered	by using the FINISH LATER option in the	COI	HER ACTIONS 🔻
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TA	CANCEL		N :K)3	
	New York, NY, 12345	Time Estimate	12	

4. Provide a reason for declining > Click 'Decline to Sign'

Please Review & Act on These External REGMT-CM1 SGA Sandbox (Development-DEVPRODUCT	Decline to Sign	×	DocuSign
Please review Time Change Request and render your	Please provide a reason for declining:		
Please review the documents below.		CONTINUE	OTHER ACTIONS -
Ť	500 characters remaining	958 DN, NG DN	
ra 🕑	DECLINE TO SIGN CANCEL	RK 103	
	(Consecutive Calendar Days):		

Accept TCR – VP

Role	_	Preceding Steps	_	Outcome
VP of Construction	\rightarrow	The TCR is DocuSign approved and the estimated cost is over \$100k or the time estimate is over 30 days.	\rightarrow	The TCR is accepted.

Step

🖹 Tasks	SCA DEVQA	DA SCA PM-CM-VP - D	
←	E List V SHARE	양 DELEGATE HISTORY 양	
Project Finder	Q = View. Default * FROM SUBJECT DATE /	TCR Task View Source Record >	l ×
Apps	External REOMT-CM1-PM TCR Cl0004 Scheduler Review Task on Q262 Electrical Sv., 10/8/2	2 V PROJECT INFORMATION > SE	ECTIONS
Q Search	1 item(s)	Expense Contract MC0001 - SCA GC 1 - Q262 Electrical Systems PROJECT INFOI Design Number / Package Number D019266 LLW 115244 - ELECTRICAL SYSTEMS Architect SCA In House AEGR - SCA Sandhox Contractor External REQMT-CM1 - SCA CM Firm 1 V DETAILS C1 Number C10/8/2021 Subject Schedule delay due to traffic TCR Description	KFLOW
		COST Cost Effect Increase Estimated Cost \$5,000.00 Reason Code F-FIELD CON Field Condition DATES & WORKFLOW Assigned To SCA SPO - SCA Sandbox Assigned To 10/8/2021 Return Return	
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Decline TCR – VP

Role		Preceding Steps		Outcome
VP of Construction	\rightarrow	The TCR is DocuSign approved and the estimated cost is over \$100k or the time estimate is over 30 days.	\rightarrow	The TCR is rejected.

Step

Navigate to 'Tasks' > Select the task > Click 'Return' > Enter return reason > Click 'Continue'

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Assigr

Role		Preceding Steps		Outcome
Scheduling Admin	\rightarrow	The TCR is accepted.	\rightarrow	Scheduler is assigned.

Step

Navigate to 'Tasks' > Select the task > Scroll to 'DATES & WORKFLOW' section > Select a 'Scheduler' > Select 'Submit'

🖹 Tasks		Scenario 1.3 🥜	SCA Scheduling Add	- 8 ×
←	≅ List Active ∨ SHARE		REASSIGN HISTORY	
 Project Finder Apps Search Tasks ✓ Assages O cetting Started 	Q 〒 View: Default ► FROM SUBJECT SCA SPO TOR CID025 Scheduling Admin Assignment Task on Sc 1 litem(s)	DATE ASSIGNED DUE DATE APP - 9/8/2021 TCR	TCR View Source Record > Cost Effect Increase Estimated Cost \$6,000.00 Reason Code F-FIELD CON Field Condition < SCHEDULE Time Estimate (Consecutive Calender Days) DATES & WORKFLOW Assigned To SCA Scheduling Admin - SCA Sandbox Assigned To SCA Schedulier - SCA Sandbox Assigned To SCA Schedulier - SCA Sandbox Assigned To SCA Schedulier - SCA Sandbox Scheduler - SCA Sandbox • Final Settlement of Time Extension Request © Submit Return	Tesk SECTIONS PROJECT INFORMATION DETAILS COST SCHEOULE DATES & WORKFLOW REVIEWERS COMMENTS REFERENCES MEDIA
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Send Recommendation Memo

Role	Preceding Steps	Outcome
	A Scheduler is assigned.	Scheduler submits
		Recommendation Memo.
`ahadular	Note. The Scheduler creates a	`
scheduler	Recommendation Memo and	The CM PM issues the
	coordinates with others	Recommendation Memo for
	outside of CAMP.	approval.

Steps

 Navigate to 'Tasks' > Select the task > Scroll down to the 'REFERENCES' section > Select 'UPLOAD' > Select the file to upload > Click 'Open' > Click 'Ok'





2. Navigate to 'Tasks' > Select the task > Scroll down to the 'REFERENCES' section > Select the '...' icon > Select 'Add Approval Doc' > Enter the filename > Select approval documentation > Click 'Ok'

🖹 Tasks		SCA DEVQA	SCA Scheduler – 🗆 🗙
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Create Approval Document			×
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Recommendation Memo			
Include On Send			
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7			
Add More			
		8	_
		Cancel Ok	-

3. Navigate to 'Tasks' > Select the task > Click 'Send Recommendation'



Return TCR

Role	Preceding Steps		Outcome
Schodulor	 A Schodulor has been assigned	<u> </u>	The TCR is returned to the CM
Schedulei	 A scheddier has been assigned.		Firm to resubmit

Step

Select the assigned task > Select 'Return' > Enter in return reason > Click 'Continue'

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Cancel TCR

				0
Role	_	Preceding Steps		Outcome
Scheduler	\rightarrow	A Scheduler has been assigned.	\rightarrow	The TCR is cancelled

Step

Select the assigned task > Select 'Cancel' > Enter in return reason > Click 'Continue'

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ole					Preceding Steps			Outco	me		
М РМ				\rightarrow	Scheduler sent the		\rightarrow	DocuS	ign Approv	al Start	s with
					Recommendation Memo).		the CN	ИРМ.		

Step

Navigate to 'Tasks' > Select the task > Click 'Send'



DocuSign Approve

Role		Preceding Steps		Outcome
Approval Sequence: CM Firm > CPO > Scheduling Director	\rightarrow	The Recommendation Memo is issued.	\rightarrow	The TCR is approved.

Steps

5. Go to email account > Select email > Select 'REVIEW DOCUMENT'

TCR Cl0003 Approval Task on Q262 Electrical Systems Intervention			•	Ø
External REQMT-CM1-PM via DocuSign <dse_demo@docusign.net> to External ▼</dse_demo@docusign.net>	12:56 PM (1 minute ago)	$\stackrel{4}{\sim}$	*	:
DocuSign				
External REQMT-CM1-PM sent you a document to revi	ew and sign.			
External REQMT-CM1-PM nycsca.kahua.CMFirm1+PM@gmail.com				
Please review Time Change Request and render your decision.				

6. Check the 'I agree to use electronic records and signatures' box (only if first time using DocuSign) > Click 'CONTINUE'



 Select 'Signature' > Place on Signature line > Select Date Signed > Place on Signature line > Click 'FINISH' Note. The image shows the steps for the CM Firm. The steps for the CPO and Scheduling Director are the same.

Done! Select Finish to send the completed d	ocument.	5 FINISH	OTHER ACTIONS -
	Q Q 🖓 😐 Q		Ľ
FIELDS Signatur 1 DS Initial Stamp Date Signed 3	As part of this settlement the Contractor reserves its rights to claim delay, inefficiency/loss of productivity, demobilizations, remobilizati Work Plan Requirements. The SCA reserves its rights to reject or submitted by the Contractor, and reserves any and all defenses it in brought by the Contractor for delay, inefficiency/loss of productivity, remobilization, Safe Work Plan and Safe Work Plan Requirements. Incorporation of this recommendation shifts contract substantial cor 05JAN2023. A modified schedule with a data date of 210CT2020, the forecasted SiC and the added 4 calendar day Management Re Substantial Completion to Final Completion. Once reviewed and a become the Revised Project Baseline". All additional time impacts orders shall demonstrated on the accepted "Revised Project Baseline".	DVID-19 related costs for Safe Work Plan and Safe spromise any such claim have against claims smobilizations, letion from 15JUN2022 to flecting the 204 cost bitto rev [°] activity, iced shift to rev [°] activity, iced from pyted this schedule will luding COVID stop work "and be submitted to the	^
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Title T Text Checkbox	(Signature / Date) S DULIPETA-RAMA -SCA CPO ((Signature / Date) J TOPORNYCKY - SCA Schedul	nstruction Management J Unit	

8. You may be presented with the following box to Adopt your signature. Select your preferences > Click 'ADOPT AND SIGN'

onfirm your name, initials, and signature.	
Required	
ull Name*	Initials*
External EXT-GC-1	EE
REVIEW	Change St
Extend EXT-GL-1 EE	

DocuSign Reject

Role		Preceding Steps		Outcome
CM Firm, CPO, Scheduling Director	\rightarrow	The Recommendation Memo is issued.	\rightarrow	The TCR is returned to the Scheduler.

Steps

1. Go to email account > Select email > Select 'REVIEW DOCUMENT'

TCR CI0003 Appro	oval Task on Q262 Electrical Systems Inbox ×			•	Ø
External REQMT-CM1-PM vi to External 👻	ia DocuSign <dse_demo@docusign.net></dse_demo@docusign.net>	12:56 PM (1 minute ago)	☆	*	:
	DocuSign				
	External REQMT-CM1-PM sent you a document to review and s	ign.			
	External REQMT-CM1-PM nycsca.kahua.CMFirm1+PM@gmail.com				
	Please review Time Change Request and render your decision.				

 Click 'Other Actions' > 'Click Decline to Sign' Please Review & Act on These Documents

External REQMT-CM1 SCA Sandbox (Development-DEVPF	ODUCTION-1	1/18/2021 9:57:02 PM)					-
Please review Time Change Request and ren	der your decis	ion.					
Please review the documents below.						CONTINUE	OTHER ACTIONS -
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					122064 - EXISTING SCHOOL RENOVATION	Print & Sign	
	ATTN:	SCA CM Firm 1		ISSUE:		Assign to Someo	ne Else
		100 Fake Street New York, NY, 12345		Time Estimate	2	Decline to Sign	
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	You ar	e directed to proceed with the f	ollowing work.			View History	
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DocuSign

3. Click 'Continue'

Please Review & Act on These		DocuSian		
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Please review Time Change Request and render your	If you select CONTINUE, this document will be voided.	contact the condar directly with your		
Please review the documents below.	request. You can exit signing and save the information you've entered by using the same of	ing the FINISH LATER option in the	CONTINUE	OTHER ACTIONS •
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4. Provide a reason for declining > Click 'Decline to Sign'

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	(Consecutive			

Package TCR

Role		Preceding Steps		Outcome
Scheduling Admin	\rightarrow	The TCR is DocuSign approved.	\rightarrow	The TCR package is sent to the COU Senior Director.

Step

Navigate to 'Tasks' > Select the appropriate task > Navigate to the 'REFERENCES' section > Check boxes for documents to package (attach) to the TCR > Select 'Submit'

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Complete TCR

Role		Preceding Steps		Outcome
COU Senior Director	\rightarrow	Package is submitted.	\rightarrow	TCR is completed.

Step

Navigate to 'Tasks' > Select the appropriate task > Click 'Submit'

