



Change Orders – CM Firm Responsible - Training Guide

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About

A Change Order adds positive or negative cost items to Expense Contracts and/or extend time. Amendments process Change Orders for financial encumbrance. For Mentor Contracts, Construction Management work is also approved and encumbered. All cost lines are grouped by LLW and copied to Master Contract Authorizations.

Notes

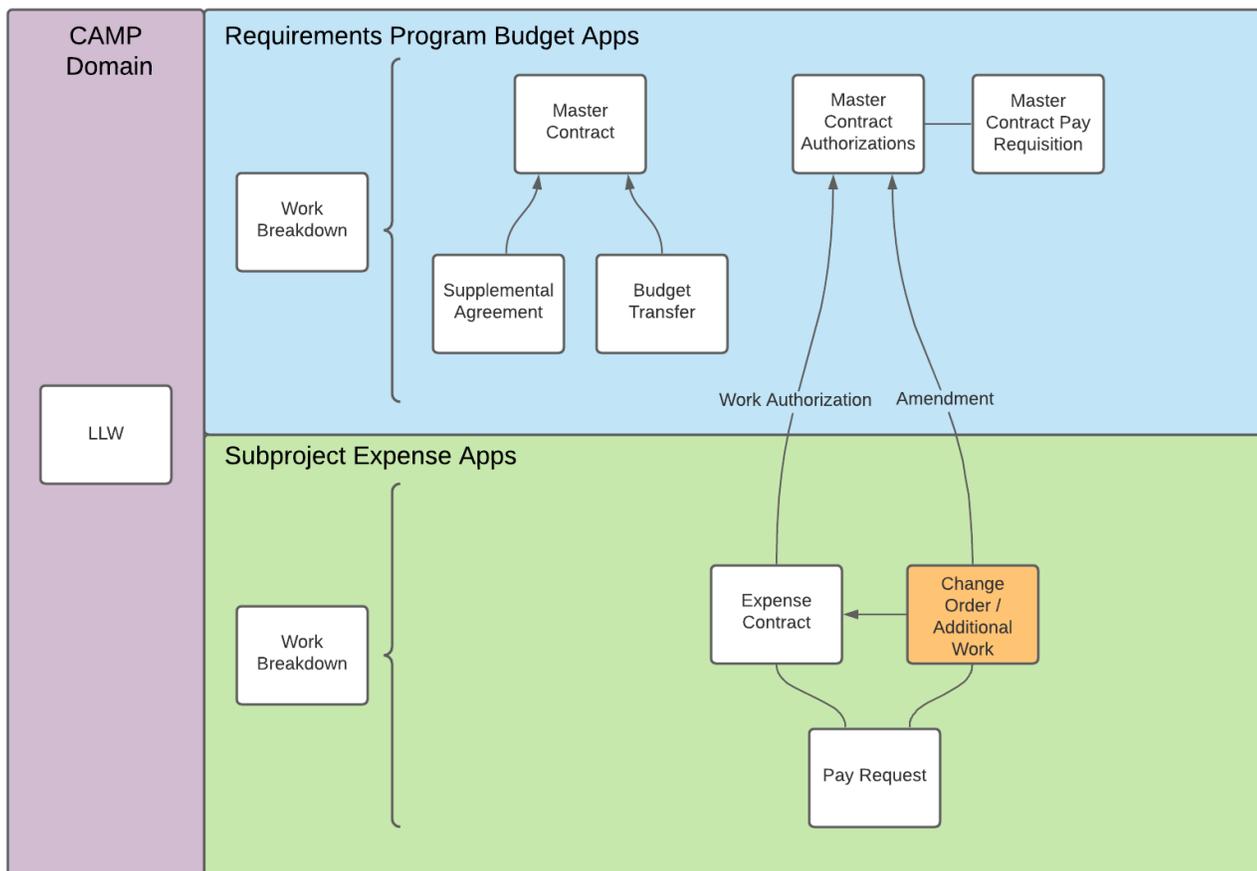
The Change Order process can be initiated by either the CM Firm (Contractor proposals under \$25K) or the COU Lead Estimator (Contractor proposals greater than \$25K). This guide provides the step-by-step instructions for when the CM Firm is responsible. Please see the separate guide for when the COU is responsible.

Process Overview

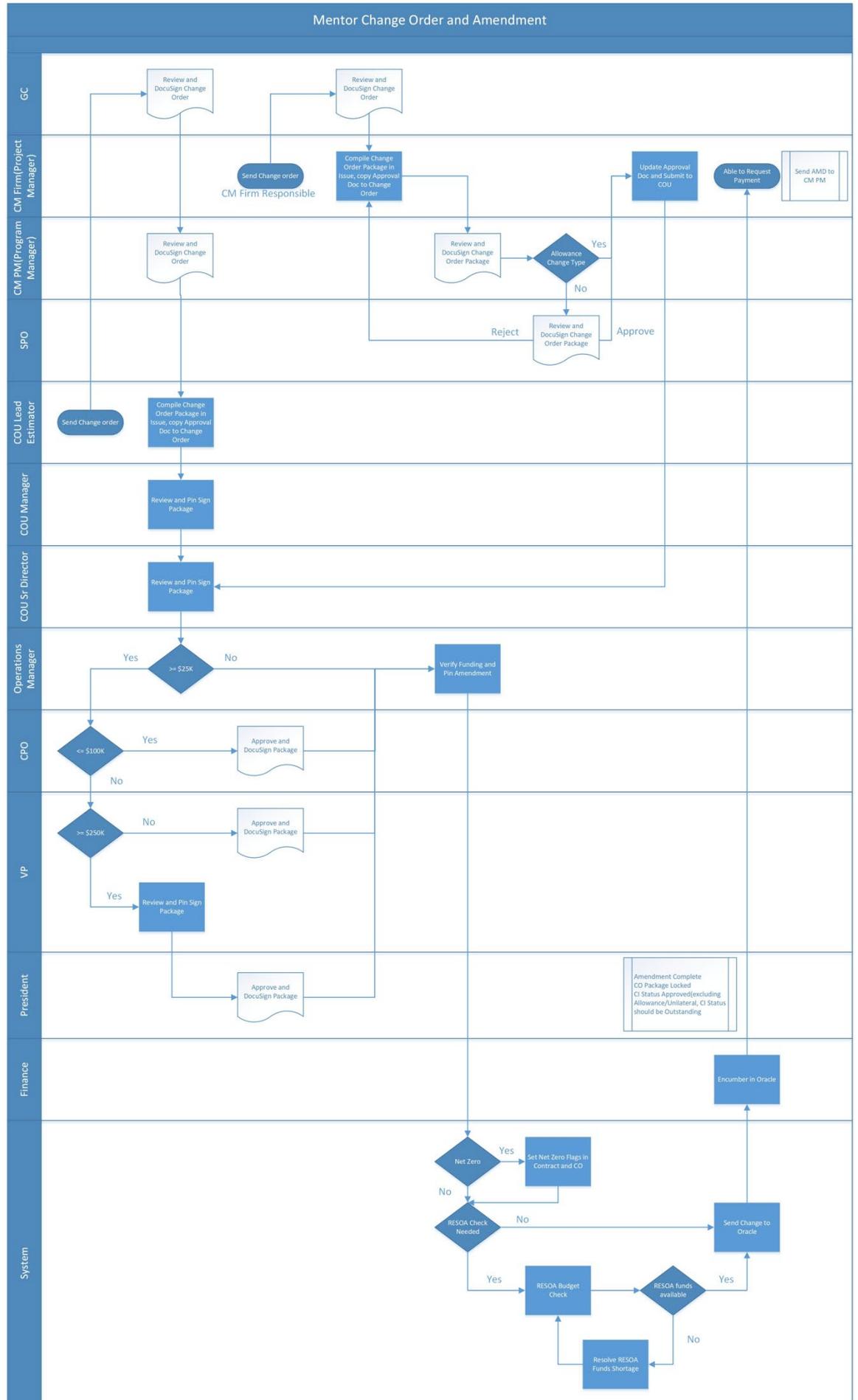
First, the CM Firm creates and submits the Change Order, which is DocuSign approved by the GC, CM PM, and SPO. Next, the CM Firm compiles the package for COU Director review followed by an approval process based on the dollar amount. Upon approval, the Operations Manager reviews and PIN signs the Amendment, which is sent to Finance for encumbrance. Once the Amendment is encumbered, the Change Order is approved for Pay Requests.

Workflow Diagram

Summary Workflow



Change Order Workflow



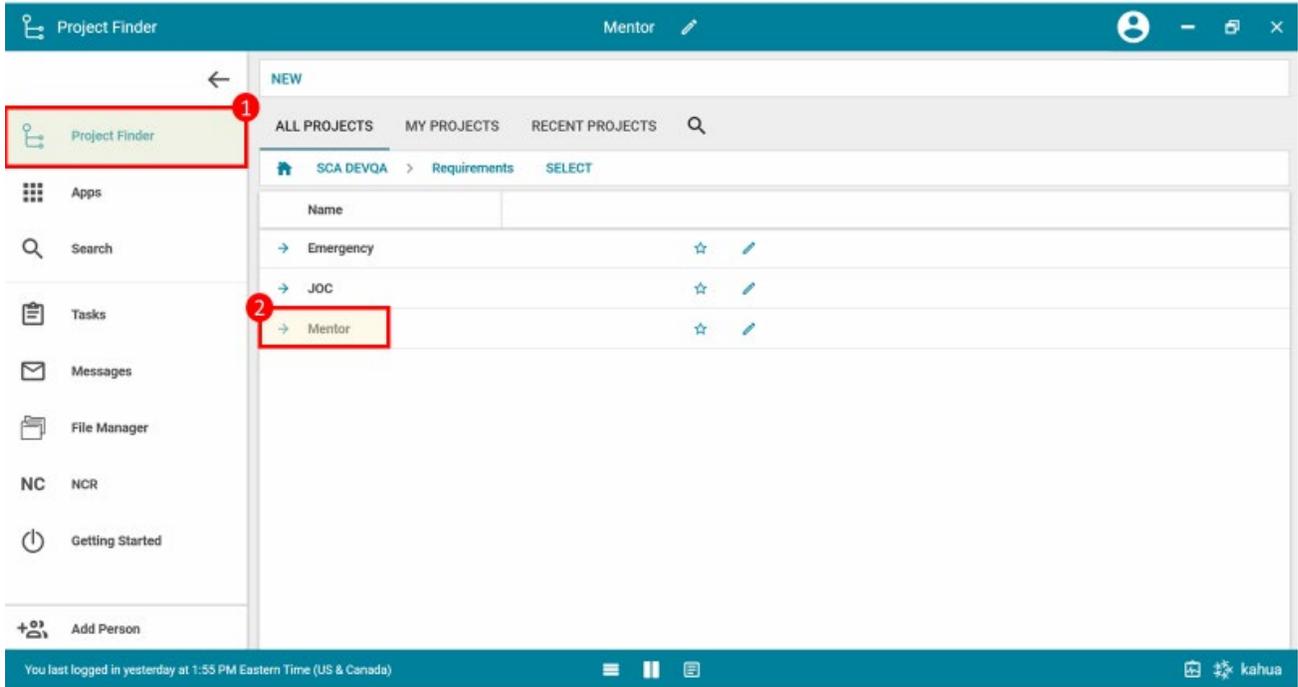
Step-by-Step Instructions

Create Change Order

Role	Preceding Steps	Outcome
CM Firm	Change Issue process is complete.	A Change Order is created.

Steps

1. Go to 'Project Finder' > Select Mentor Partition



2. Select Project

The screenshot shows the 'Project Finder' application window. The title bar includes 'Project Finder', 'C000015851-MC0001 - Q262 Electrical Systems', and the user 'Danny Zhou'. The main content area displays a list of projects under the 'ALL PROJECTS' tab. The project 'C000015851-MC0001 Q262 Electrical Systems' is highlighted with a red box and a red circle containing the number 1. The breadcrumb navigation shows the path: SCA DEVQA > Requirements > Mentor > AECOM > AECOM - Q - DELTA MNTR C15636-C15851. The status bar at the bottom indicates the user is logged in on Monday, February 27, 2023, at 5:32 PM Eastern Time (US & Canada).

Number	Name	
C000015851-MC1009	Do Not Use	☆ ✎
C000015851-MC1002	Negative Amendment Test Subproject	☆ ✎
C000015851-MC1004	Net Zero Test 2 LLW	☆ ✎
C000015851-MC1003	Net Zero Test Subproject	☆ ✎
C000015851-MC0001	Q262 Electrical Systems	☆ ✎
C000015851-MC1006	test	☆ ✎
C000015851-MC1005	Test for WA Dupe	☆ ✎

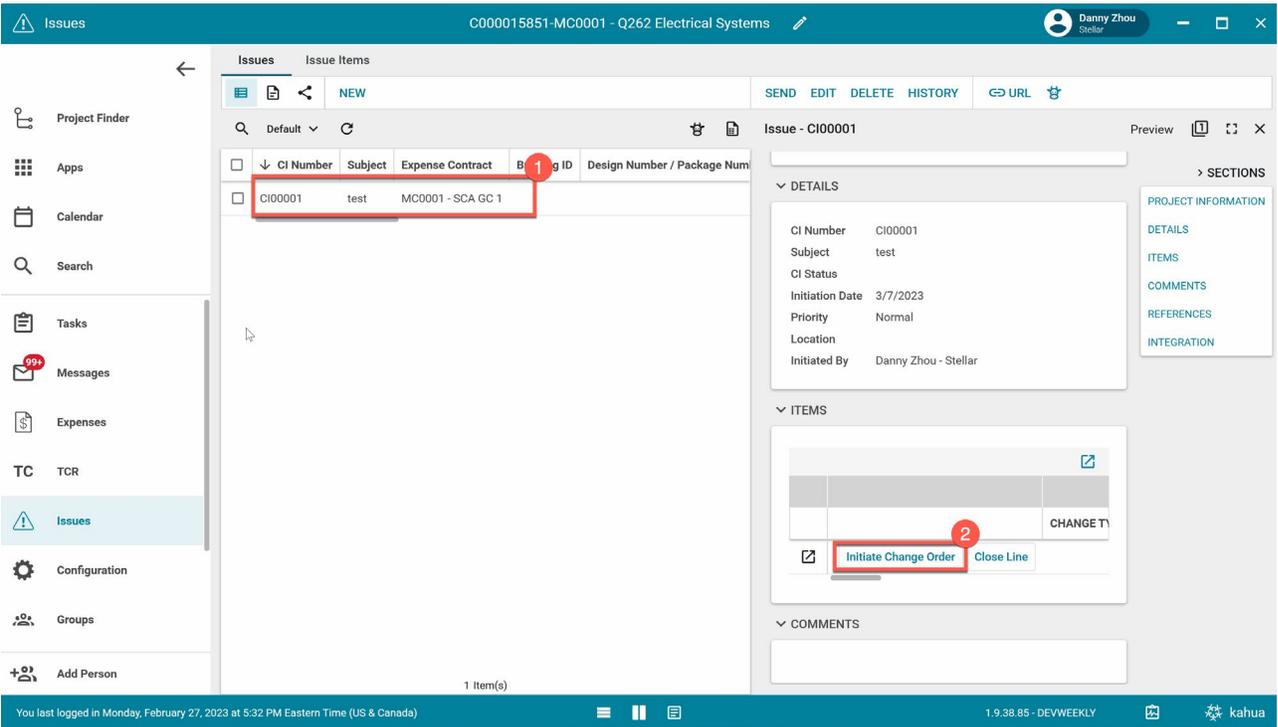
3. Go to 'Apps' > Select 'Issues' App

The screenshot shows the 'Apps' application window. The title bar includes 'Apps', 'C000015851-MC0001 - Q262 Electrical Systems', and the user 'Danny Zhou'. The main content area displays a list of applications under the 'All Apps' tab. The 'Issues' app is highlighted with a red box and a red circle containing the number 2. The breadcrumb navigation shows the path: Project Finder > Apps. The status bar at the bottom indicates the user is logged in on Monday, February 27, 2023, at 5:32 PM Eastern Time (US & Canada).

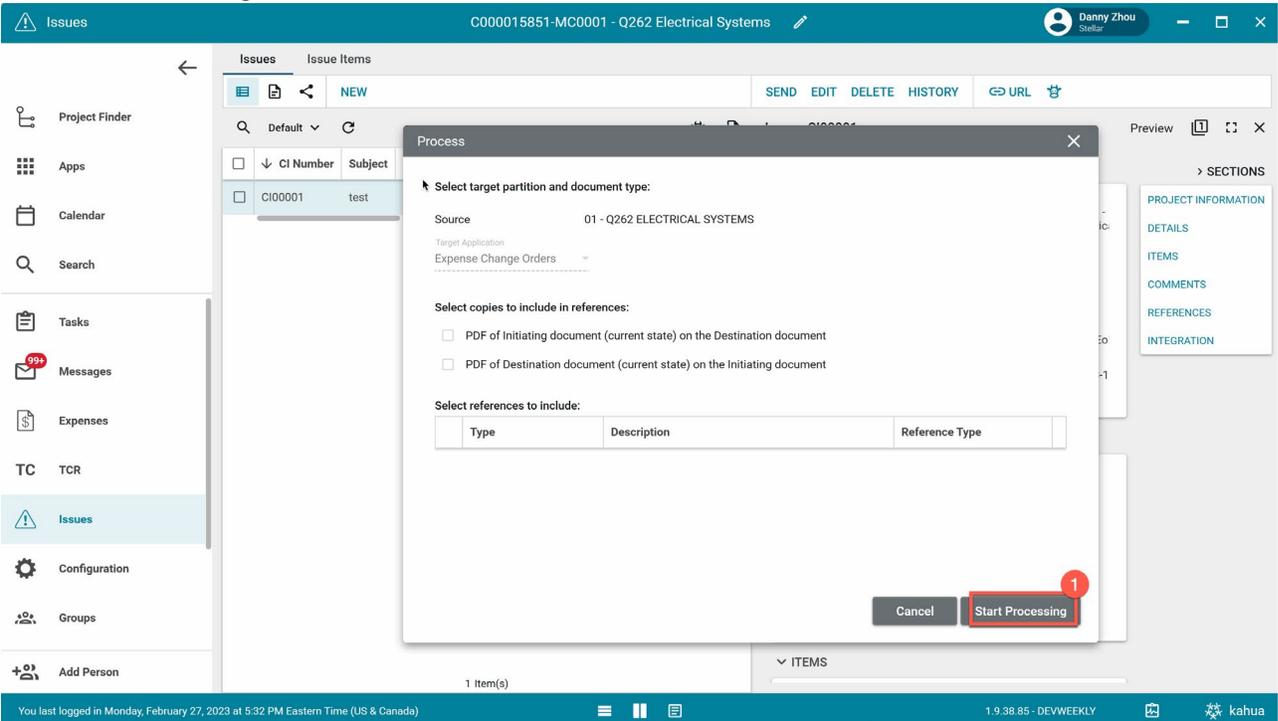
Recent	All Apps
All Apps	Administration
Administration	Cost Management
Cost Management	Document Management
Document Management	Index Management
Index Management	

All Apps
Domain Settings
Expenses
File Manager
Getting Started
Groups
IF IFA
Installed Apps
Issues
Licenses
LL LLW
Locations
Materials Catalog
Media Manager

4. Select the issue and Click Initiate Change Order button



5. Click Start Processing button



6. Fill out Scope of Work and any other required fields, then Click Save/Close

- Project Finder
- Apps
- Calendar
- Search
- Tasks
- Messages 99+
- Expenses**
- TCR
- Issues
- Configuration
- Groups
- Add Person

Change Order

Title
test

Total Change Order Amount
\$ 1,000.00

Justification for Change

Date Complete

Responsible Party Daisy External REQMT-CM1 - SCA CM Firm 1

Linked Issue test

SCOPE

Time Estimate (Consecutive Calendar Days)

Scope of Work 1

Field is required.

DATES & WORK 2

Save / Close ▾

- DETAILS
- SCOPE
- DATES & WO
- ITEMS
- MARKUPS
- SIGNATURES
- COMMENTS
- REFERENCES
- INTEGRATIO

Update Change Order

Role	Preceding Steps	Outcome
CM Firm	Existing Change Order has been created.	The Change Order is updated.

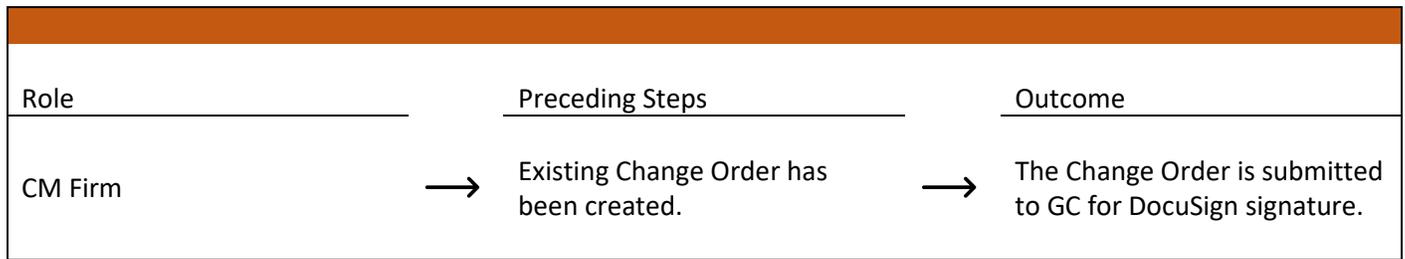
Steps

1. Select 'Change Orders' tab > Select Change Order requiring update > Click 'Edit'

The screenshot shows a software interface for managing change orders. The top navigation bar includes 'Contracts', 'Change Orders' (highlighted with a red box and a '1'), 'Additional Work', and 'Pay Requests'. Below this is a table of change orders with columns for 'Contract', 'Number', and 'Title'. The second row is highlighted with a red box and a '2', showing 'MC00450 - AJCo - SS TEST' with number '00002'. To the right of the table, there are buttons for 'SEND', 'EDIT' (highlighted with a red box and a '3'), 'VIEW', 'DELETE', and 'HISTORY'. The right side of the screen displays a preview of the selected change order, including details like 'Contract Number', 'Date', 'Title', and 'Description'. The bottom status bar shows the user is logged in at 10:58 PM Eastern Time (US & Canada) and the version is 1.9.24.97 - DEVWEEKLY.

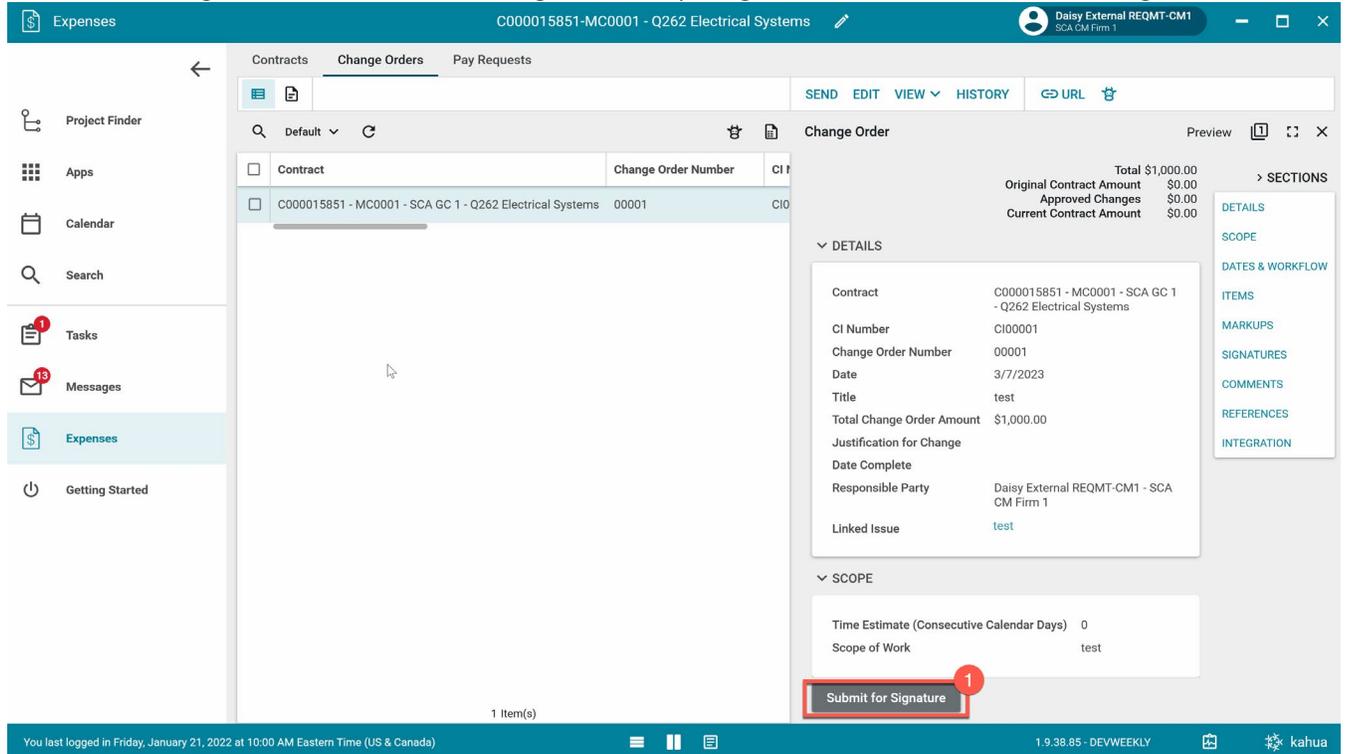
2. Update Required Fields > Click 'Save/Close'

Submit Change Order for Signature

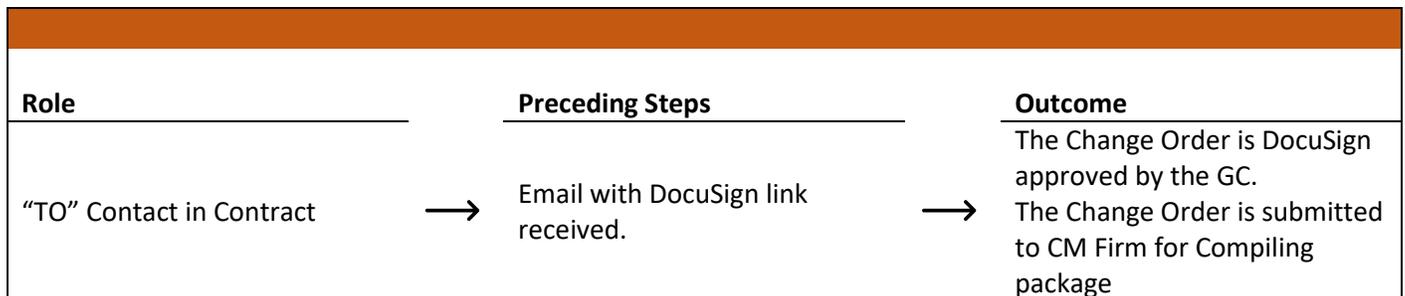


Steps

1. Select 'Change Orders' tab > Select Change Order requiring submission > Click 'Submit for Signature'

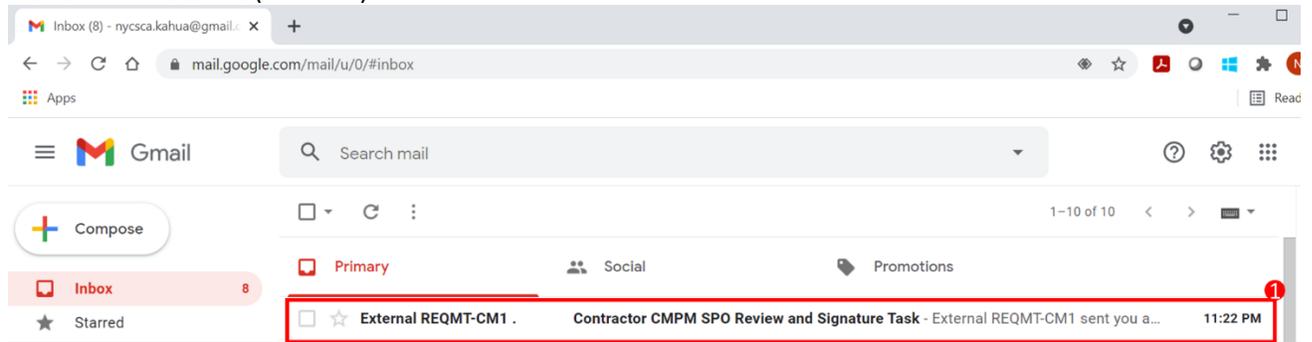


Review and DocuSign Change Order – “TO” Contact in the Contract

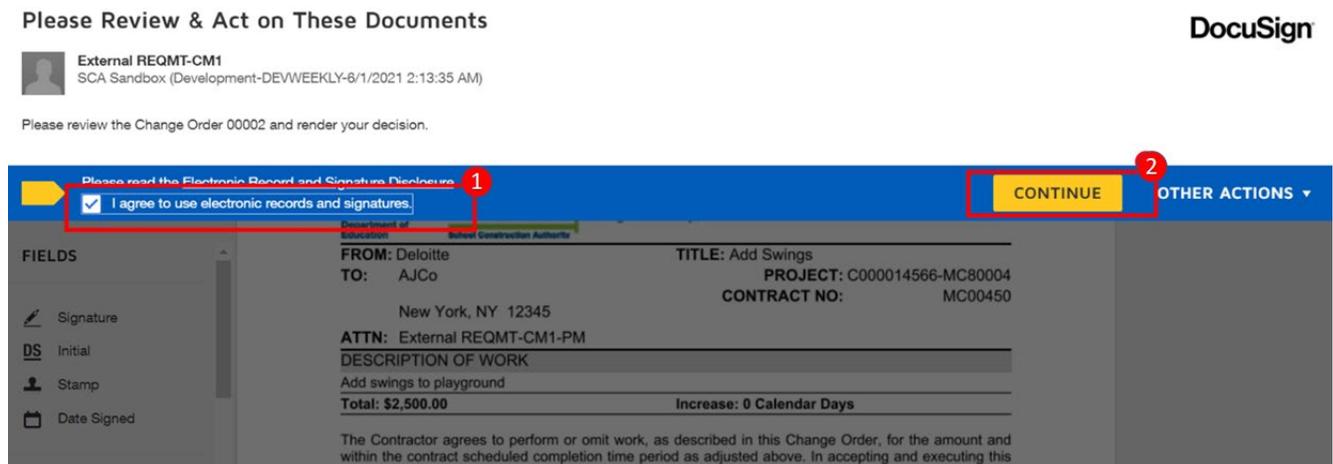


Steps

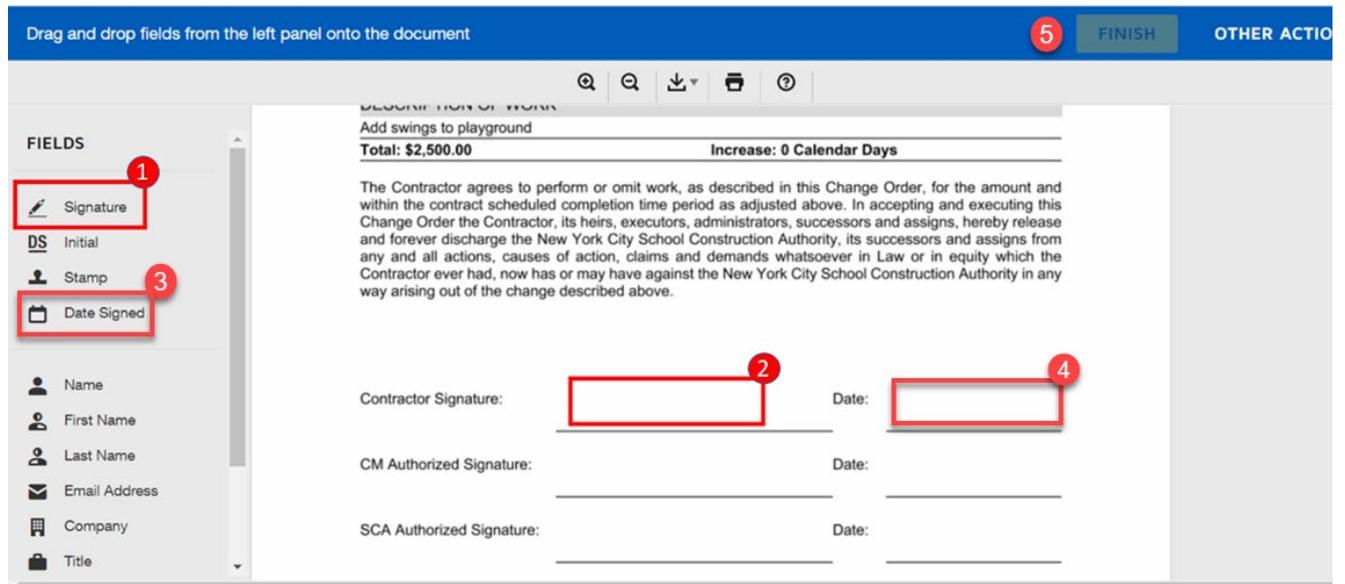
1. Go to email account (external) > Select email



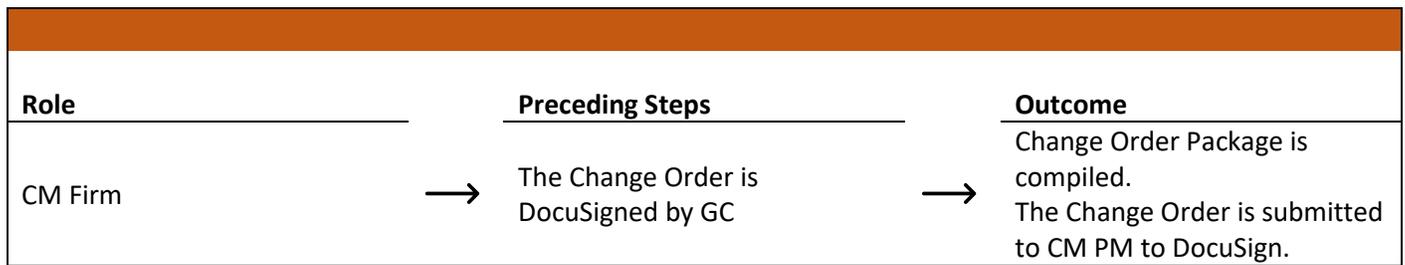
2. Click 'Review Document' button in email > Check 'I agree to use electronic records and signatures' box (only if first time using DocuSign) > Click 'Continue' button



3. Click 'Signature' button > Drag Signature in 'Contractor Signature' box > Click 'Date Signed' button > Drag Date in 'Date:' box > Click Finish



Compile Package – CM Firm



Steps

1. Go to Linked Issue

The screenshot displays a software interface for managing Change Orders. The top navigation bar shows the user is logged in as 'Daisy External REQMT-CM1' from 'SCA CM Firm 1'. The main content area is titled 'Change Order' and shows a table with one item selected. The details for this item are as follows:

Contract	Change Order Number	CI Number
C000015851 - MC0001 - SCA GC 1 - Q262 Electrical Systems	00001	CI00001

The 'DETAILS' section for the selected Change Order includes the following information:

- Contract: C000015851 - MC0001 - SCA GC 1 - Q262 Electrical Systems
- CI Number: CI00001
- Change Order Number: 00001
- Date: 3/7/2023
- Title: test
- Total Change Order Amount: \$1,000.00
- Justification for Change: (empty)
- Date Complete: (empty)
- Responsible Party: Daisy External REQMT-CM1 - SCA CM Firm
- Linked Issue: test (highlighted with a red box and a red circle with '1')

The 'SCOPE' section shows:

- Time Estimate (Consecutive Calendar Days): 0
- Scope of Work: test

The 'DATES & WORKFLOW' section is currently empty. A 'Submit for Signature' button is visible at the bottom of the details panel.

2. Click Edit button and go to References section, click add approval doc

Issues C000015851-MC0001 - Q262 Electrical Systems Daisy External REQMT-CM1 SCA CM Firm 1

Issues

SEND EDIT HISTORY URL

Issue - CI00001 Preview

PROJECT INFORMATION

Expense Contract C000015851 - MC0001 - SCA GC 1 - Q262 Electrical Systems
 Building ID Q262
 Design Number / Package Number D019286
 LLW 115244 - ELECTRICAL SYSTEMS
 Architect Adam SCA In House AEOR - SCA Sandbox
 Contractor Indigo External EXT-GC-1 - SCA GC 1

DETAILS

CI Number CI00001
 Subject test
 CI Status
 Initiation Date 3/7/2023
 Priority Normal
 Location
 Initiated By Danny Zhou - Stellar

ITEMS

Copy Approval Doc to Linked CO

SECTIONS: PROJECT INFORMATION, DETAILS, ITEMS, COMMENTS, REFERENCES, INTEGRATION

Issues C000015851-MC0001 - Q262 Electrical Systems Daisy External REQMT-CM1 SCA CM Firm 1

Issues

URL

Issue - CI00001 Edit

COMMENTS

New comment

REFERENCES

UPLOAD ADD KAHUA DOC EDIT MARKUP UPDATE REMOVE DOWNLOAD ADD COMPOSITE ADD APPROVAL DOC

TYPE	DESCRIPTION	CONTRIBUTOR	DATE	SIZE	M
Supporting Document	ChangeOrderSignatureReport.00001.en.en.eSigned.pdf	Daisy External REQMT-CM1	3/7/2023 3:54 PM	243 KB	
Supporting Document	documents.pdf	Daisy External REQMT-CM1	3/7/2023 3:59 PM	165 KB	

INTEGRATION

CES Bulletin ID

Save / Close

SECTIONS: PROJECT INFORMATION, DETAILS, ITEMS, COMMENTS, REFERENCES, INTEGRATION

3. Select the documents to be included in the Change Orde Package, use the arrow button on the right to move the order of documents and make sure the change order docusigned by GC is on the first page. Enter the Filename and then click OK. Click Save/Close.

Issue - CI00001

COMMENTS

Create Approval Document

Filename 6

Include On Send

Include	Type	Description	Page Count	Size	Is Current	
<input checked="" type="checkbox"/> 3	Supporting Document	ChangeOrderSignatureReport.00001.en.en.eSignec	2	243 KB	Yes	5
<input checked="" type="checkbox"/> 4	Supporting Document	documents.pdf	4	165 KB	Yes	

Cancel Ok 7

Issue - CI00001

COMMENTS

REFERENCES

TYPE	DESCRIPTION	CONTRIBUTOR	DATE	SIZE	M
Approval Document	Change Order Package.pdf		3/7/2023 4:05 PM		
Supporting Document	ChangeOrderSignatureReport.00001.en.en.eSigned.pdf	Daisy External REQMT-CM1	3/7/2023 3:54 PM	243 KB	
Supporting Document	documents.pdf	Daisy External REQMT-CM1	3/7/2023 3:59 PM	165 KB	

Save / Close 8

4. Click Copy Approval Doc to Linked CO

Issues C000015851-MC0001 - Q262 Electrical Systems Daisy External REQMT-CM1 SCA CM Firm 1

Issues

SEND EDIT HISTORY URL

Issue - CI00001

PROJECT INFORMATION

Expense Contract	C000015851 - MC0001 - SCA GC 1 - Q262 Electrical Systems
Building ID	Q262
Design Number / Package Number	D019286
LLW	115244 - ELECTRICAL SYSTEMS
Architect	Adam SCA In House AEoR - SCA Sandbox
Contractor	Indigo External EXT-GC-1 - SCA GC 1

DETAILS

CI Number	CI00001
Subject	test
CI Status	
Initiation Date	3/7/2023
Priority	Normal
Location	
Initiated By	Danny Zhou - Stellar

ITEMS

Copy Approval Doc to Linked CO

SECTION: PROJECT INFORMATION

- DETAILS
- ITEMS
- COMMENTS
- REFERENCES
- INTEGRATION

You last logged in Friday, January 21, 2022 at 10:00 AM Eastern Time (US & Canada) 1.9.38.85 - DEVWEEKLY kahua

5. Go back to the change order app. Select the Change order and Click Submit for Signature button

Expenses C000015851-MC0001 - Q262 Electrical Systems Daisy External REQMT-CM1 SCA CM Firm 1

Contracts Change Orders Pay Requests

SEND EDIT VIEW HISTORY URL

Change Order

Contract	Change Order Number	CI Num	Total
C000015851 - MC0001 - SCA GC 1 - Q262 Electrical Systems	00001	CI00001	\$1,000.00
			Original Contract Amount \$0.00
			Approved Changes \$0.00
			Current Contract Amount \$0.00

DETAILS

Contract	C000015851 - MC0001 - SCA GC 1 - Q262 Electrical Systems
CI Number	CI00001
Change Order Number	00001
Date	3/7/2023
Title	test
Total Change Order Amount	\$1,000.00
Justification for Change	
Date Complete	
Responsible Party	Daisy External REQMT-CM1 - SCA CM Firm 1
Linked Issue	test

SCOPE

Time Estimate (Consecutive Calendar Days)	0
Scope of Work	test

DATES & WORKFLOW

Submit for Signature

1 Item(s)

SECTION: DETAILS

- SCOPE
- DATES & WORKFLOW
- ITEMS
- MARKUPS
- SIGNATURES
- COMMENTS
- REFERENCES
- INTEGRATION

You last logged in Friday, January 21, 2022 at 10:00 AM Eastern Time (US & Canada) 1.9.38.85 - DEVWEEKLY kahua

Review and DocuSign Change Order – CM PM

Role	Preceding Steps	Outcome
CM PM	→ Email with DocuSign link received.	→ The Change Order is DocuSign approved by CM PM. The Change Order is submitted to SPO to DocuSign approve.

***See screenshots from “Review and DocuSign Change Order > General Contractor for the four steps below”**

Steps

1. Go to email account (external) > Select email
2. Click 'Review Document' button in email
3. Click 'Continue' button
4. Click 'Start' button > Click 'Sign' button > Click 'Finish' button

Review and DocuSign Change Order – SPO

Role	Preceding Steps	Outcome
SPO	→ Email with DocuSign link received, and Existing Change Order has been created. Change Order type is not ending with W.	→ The Change Order is DocuSign approved by SPO. Ready for CM Firm to Update Change Order package.

***See screenshots from “Review and DocuSign Change Order > General Contractor”**

Steps

1. Go to email account (external) > Select email
2. Click 'Review Document' button in email
3. Click 'Continue' button
4. Click 'Start' button > Click 'Sign' button > Click 'Finish' button

Update Change Order Package

Role	Preceding Steps	Outcome
CM Firm	Change Order DocuSign approved by GC, CM PM and SPO. →	Change Order Package is submitted for COU Manager review and PIN code signature. →

Steps

1. Go to linked issue, click the Edit button, scroll down to References Section following the steps in compile package step
2. Select the approval document, click the three dots and click Edit button

The screenshot shows the 'Issues' page in Kahua. The main content area displays a table of references for issue CI00001. The table has columns for 'TYPE', 'DESCRIPTION', and 'EDIT'. The first row is an 'Approval Document' with a description of 'Change Order'. A context menu is open over this row, showing options like 'EDIT', 'REMOVE', and 'DOWNLOAD'. Red annotations highlight the 'Approval Document' row (1) and the 'EDIT' button in the context menu (2).

TYPE	DESCRIPTION	EDIT
Approval Document	Change Order	EDIT
Supporting Document	ChangeOrderSignatureRef	
Supporting Document	documents.pdf	
Supporting Document	Change Order Package.eS	

3. Unselect the old DocuSigned document with GC signature and the other documents. Select the new DocuSigned document with all parties signature using left side checkboxes. Then click ok. Click Save/Close.

Edit Approval Document

Filename: Change Order Package.pdf

Include On Send

Include	Type	Description	Page Count	Size	Is Current
<input type="checkbox"/>	Supporting Document	ChangeOrderSignatureReport.00001.en.en.eSignec	2	243 KB	Yes
<input type="checkbox"/>	Supporting Document	documents.pdf	4	165 KB	Yes
<input checked="" type="checkbox"/>	Supporting Document	Change Order Package eSigned.pdf	6	488 KB	Yes

[Add More](#)

2 Item(s)

Save / Close

4. Click Copy Approval Doc to Linked CO

Issue - CI00001

SEND EDIT HISTORY

PROJECT INFORMATION

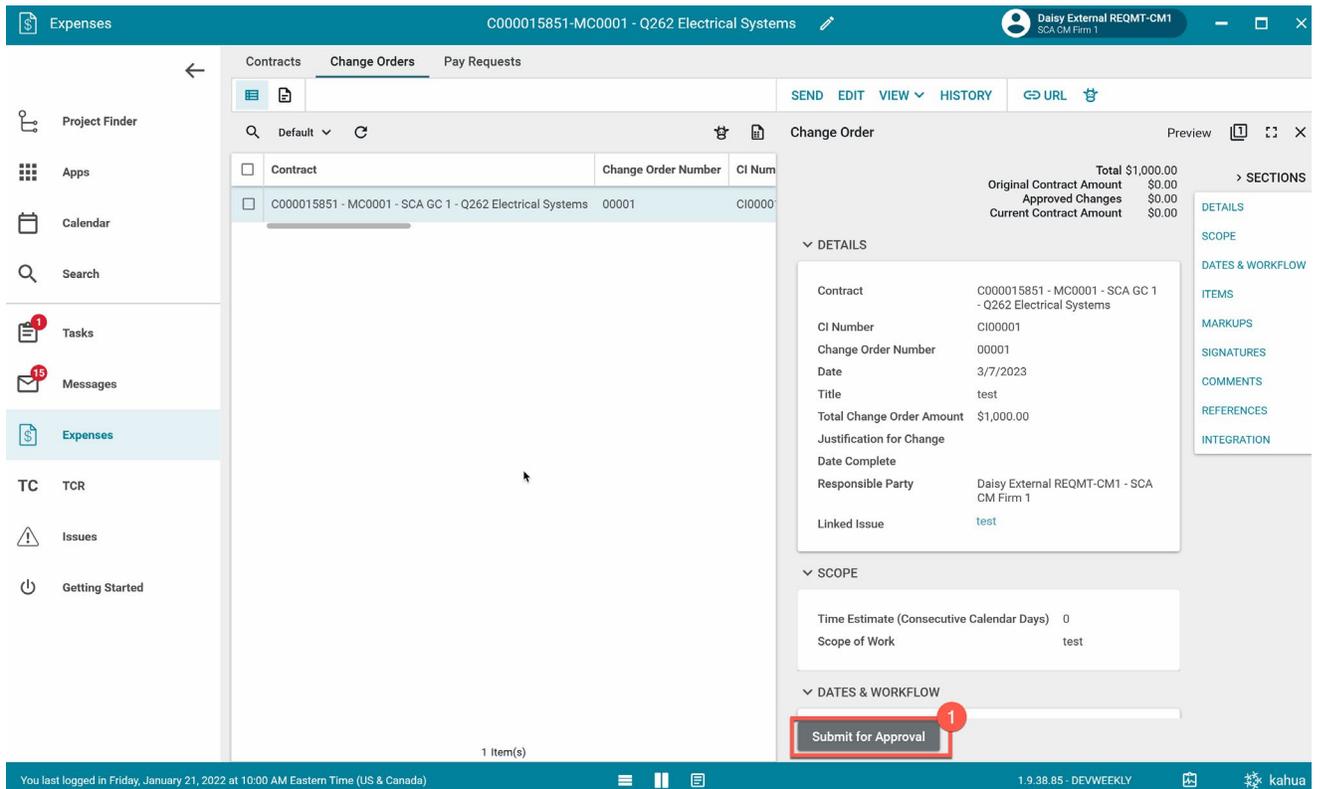
Expense Contract: C000015851 - MC0001 - SCA GC 1 - Q262 Electrical Systems
 Building ID: Q262
 Design Number / Package Number: D019286
 LLW: 115244 - ELECTRICAL SYSTEMS
 Architect: Adam SCA In House AEoR - SCA Sandbox
 Contractor: Indigo External EXT-GC-1 - SCA GC 1

DETAILS

CI Number: CI00001
 Subject: test
 CI Status:
 Initiation Date: 3/7/2023
 Priority: Normal
 Location:
 Initiated By: Danny Zhou - Stellar

ITEMS

5. Go to change order and Click 'Submit for Approval'



COU Senior Director Review and Pin Code Sign

Role	Preceding Steps	Outcome
COU Senior Director	→ Change Order Approval Doc is updated by CM Firm. →	<p>COU Senior Director review and PIN sign is completed. Change Order is routed to next user in workflow based on dollar amount:</p> <ul style="list-style-type: none"> • Less than absolute value of \$25K - Operations Manager. • Greater than absolute value of \$25K and less than or equal to absolute value of \$100K - CPO. • Greater than absolute value of \$100K – VP.

Steps

1. Go to 'Tasks' > Select task > Click 'Approve' > Enter PIN > Click 'Continue'

Operations Manager Review AMD and Pin Code Sign

Role	Preceding Steps	Outcome
Operations Manager	<p>The Change Order Package has been reviewed by the COU Senior Director and the Change Order is less than absolute value of \$25K.</p> <p>OR</p> <p>The Change Order has been reviewed by the COU Senior Director and the Change Order has been DocuSign by the Approver based on dollar amount</p>	<p>Change Order Amendment is reviewed by Operations Manager.</p> <p>Change Order is sent for encumbrance in Oracle. Once encumbered, the Change Order is complete, and the Contractor can request payment.</p>

***See screenshots in “Review and Pin Code Sign Change Order Package – COU Senior Director”**

Steps

1. Go to 'Tasks' and
2. Select the Task
3. Click 'Approve' button
4. Enter PIN and click 'Continue'

Approve and DocuSign Package – CPO

Role	Preceding Steps	Outcome
CPO	<p>The Change Order has been reviewed by the COU Senior Director</p> <p>The Change Order is > absolute value of \$25k and <= absolute value of \$100k.</p>	<p>Change Order is approved by CPO.</p> <p>Change Order is sent to Operations Manager</p>

***See screenshots in “Review and DocuSign Change Order > General Contractor”**

Steps

1. Go to email account (external) > Select email
2. Click 'Review Document' button in email
3. Click 'Continue' button
4. Click 'Start' button > Click 'Sign' button > Click 'Finish' button

Approve and DocuSign Package – Vice President

Role	Preceding Steps	Outcome
Vice President	<p>The Change Order has been reviewed by the COU Senior Director.</p> <p>The Change Order is > absolute value of \$100K and <= absolute value of \$250K.</p>	<p>Change Order is approved by VP.</p> <p>Change Order is sent to Operations Manager.</p>

***See screenshots in “Review and DocuSign Change Order > General Contractor”**

Steps

1. Go to email account (external) > Select email
2. Click 'Review Document' button in email
3. Click 'Continue' button
4. Click 'Start' button > Click 'Sign' button > Click 'Finish' button

Vice President Review and Pin Code Sign

Role	Preceding Steps	Outcome
Vice President	<p>The Change Order has been reviewed by the COU Senior Director.</p> <p>The Change Order is greater than absolute value of \$250K.</p>	<p>VP reviewed by PIN code signing the approval.</p> <p>Change Order is sent to President for DocuSign approval.</p>

***See screenshots in “Review and Pin Code Sign Change Order Package – COU Senior Director”**

Steps

1. Go to 'Tasks' and
2. Select the Task
3. Click 'Approve' button
4. Enter PIN and click 'Continue'

Approve and DocuSign Package – President

Role	Preceding Steps	Outcome
President	<p>The Change Order is greater than absolute value of \$250K.</p>	<p>President review and sign off is completed.</p> <p>Change Order is sent for Operations Manager.</p>

***See screenshots in “Review and DocuSign Change Order > General Contractor”**

Steps

1. Go to email account (external) > Select email
2. Click 'Review Document' button in email
3. Click 'Continue' button
4. Click 'Start' button > Click 'Sign' button > Click 'Finish' button

