

OKLAHOMA DEPARTMENT OF TRANSPORTATION  
CONSTRUCTION DIVISION - TRNS\*PORT BRANCH

# Sitemanager Procedure Manual

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## CHANGE ORDERS



### Contains :

- Creating Change Orders
- Approval Methods
- Attachments

# CHANGE ORDERS

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# CHANGE ORDERS



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**CHANGE ORDERS**

# CHANGE ORDERS

## CREATING A CHANGE ORDER

### OVERVIEW

This series of procedure details the necessary parts of a Change order. A unilateral Change order can be applied to any one of this circumstance. The Only difference is that the Contractor will not be signing the Document.



### USER(S) FOR THIS PROCEDURE

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)		
RESPRMAN	Residency Project Manager (R)		
CONPRMAN	Consulant Residency Project Manager (R)		



### REFERENCES

Reference	Number
SiteManager Policy	0801.0, 0801.1, 0801.2, 0801.3, 0801.4
Control Directive	20090729, 20020212, 20000225, 19971107, 19961121, 19920904

# CHANGE ORDERS



## CREATING A CHANGE ORDER

A

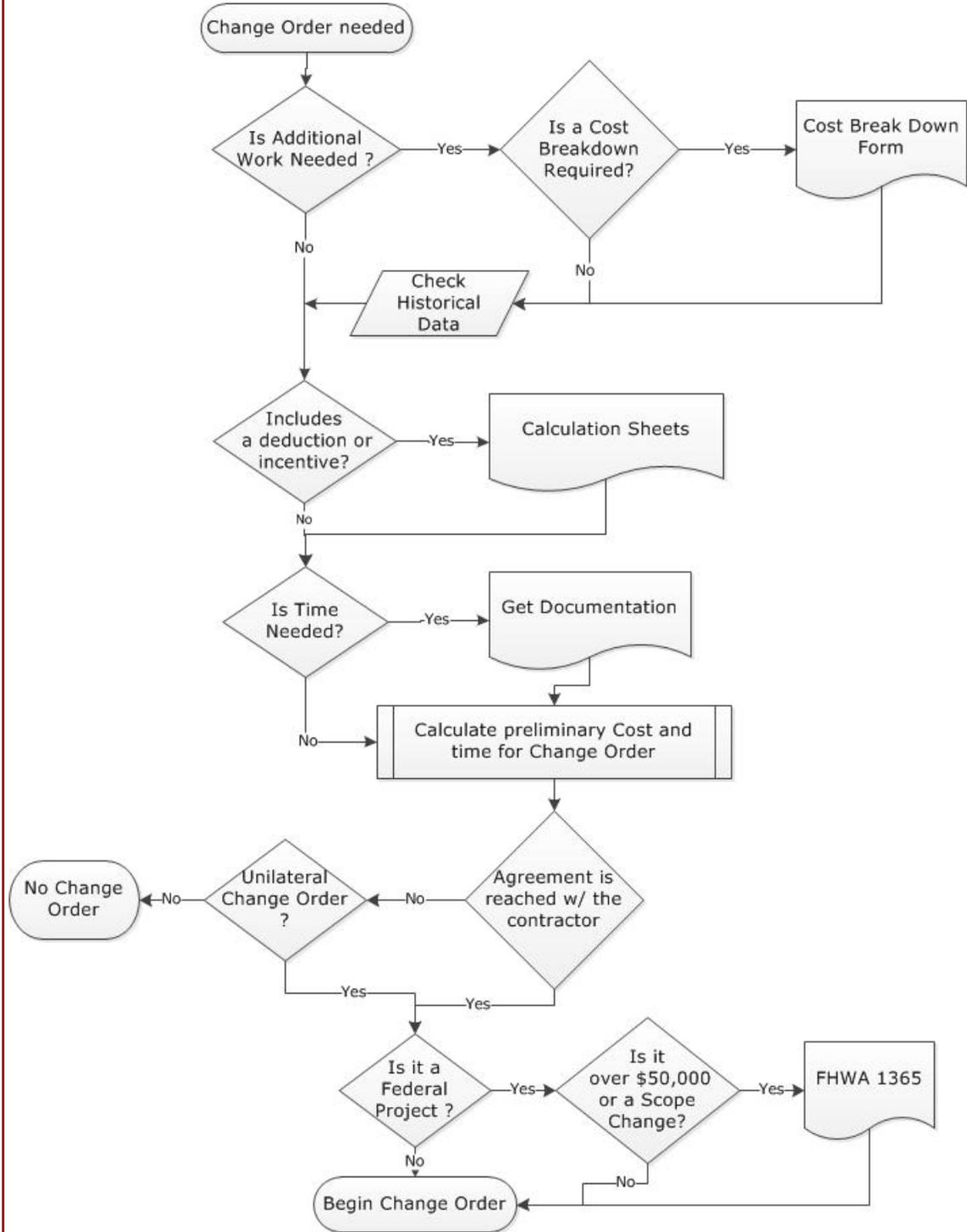
### REPORTS



Report	Location
Change order to Contractor	

### NOTES



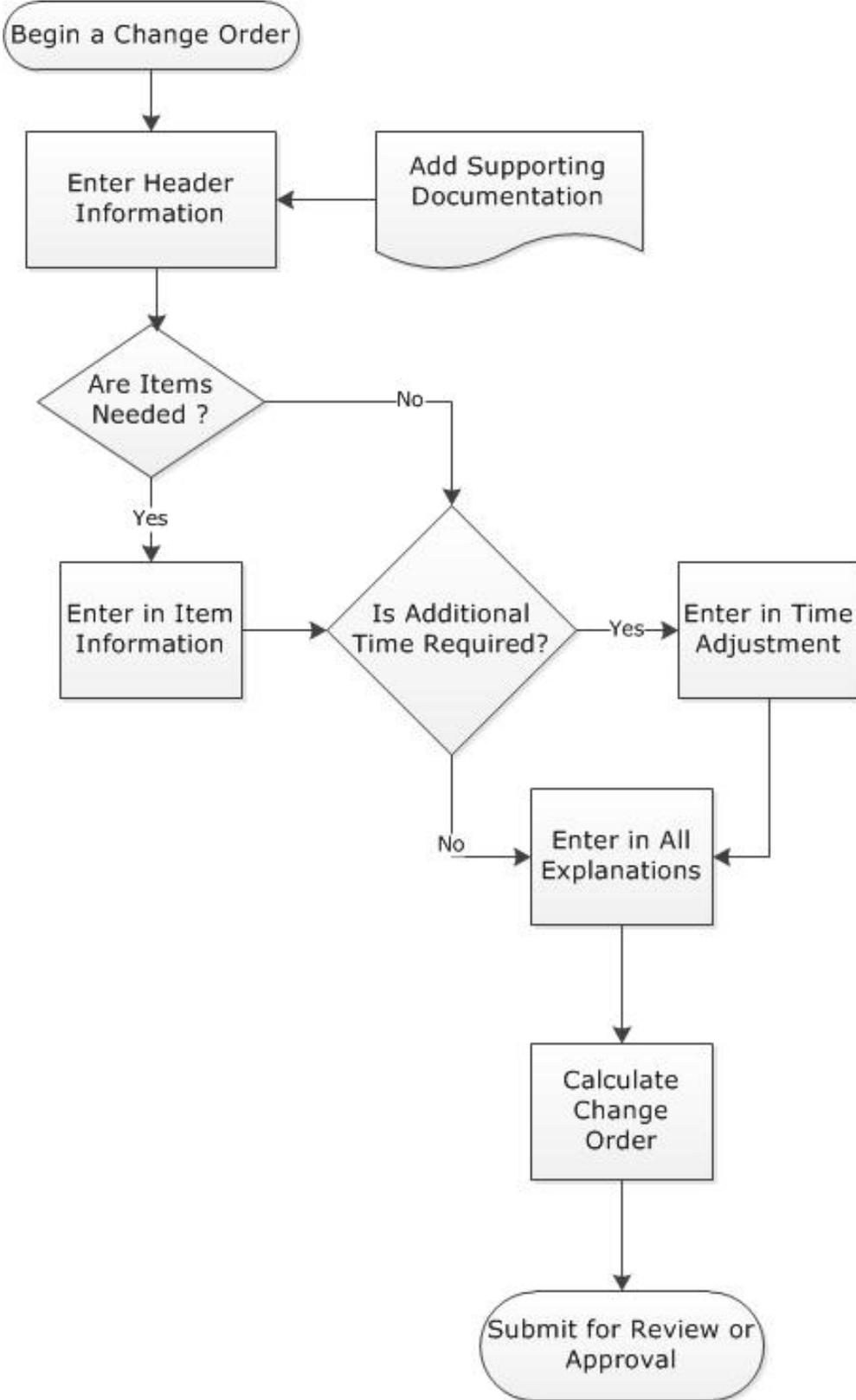


# CHANGE ORDERS



## CREATING A CHANGE ORDER

A



# CHANGE ORDERS

**A.1****MATERIAL DEDUCTION CHANGE ORDER****PROCESS**

Creating a Material Deduction Change Order

**STEPS**

- ◆ 1. ENTERING IN THE HEADER
- ◆ 2. ENTERING IN NEW ITEM INFORMATION
- ◆ 3. ENTERING IN CHANGE ORDER ITEM INFORMATION
- ◆ 4. ENTERING IN GENERAL AND ITEM EXPLANATION
- ◆ 5. RECALCULATING CHANGE ORDER

# CHANGE ORDERS



## MATERIAL DEDUCTION CHANGE ORDER

A.1

### STEP

1

Entering in Header Information.

### USER



GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		

### SCREENSHOT



Go to Main Panel / Change Order/ Change Order Maintenance / Header

The screenshot shows a software interface for Change Order Header information. It includes fields for Contract ID (040436), CD Number (018), and Tentative Verbal Approval Dates (Federal: 00/00/00, Local: 00/00/00). Other fields include CD Created by (Wilson, Antonella C.), Date (12/11/09), Status (Draft), and Approval Level. There are dropdown menus for Reason Code and CD Type. Checkboxes are present for Override Approval Rules, Emergency Work, and various Functions (Overrun/Underrun, Force Account, Extra Work, Zero Dollar, Time Adjustment, Final Quantity). Contract amounts are displayed: Bid Contract Amt: \$24,831,744.31, Current Contract Amt: \$24,817,310.01, and CD Amount: \$0.00. Reference fields for Dispute and Force Account are also visible.

# CHANGE ORDERS

A.1(1)

## MATERIAL DEDUCTION CHANGE ORDER

### ENTERED INFORMATION



FIELD	
FEDERAL	For those contracts which require Federal Oversight, enter the date that the change was granted verbal approval by the FHWA.
LOCAL	For those contracts which are Local Government projects, enter the date that the Local Government entity was notified of the pending change order.
DESCRIPTION	<b>"MATL DEDUCT FOR _____"</b>
REASON CODE	<b>SITE REQUIREMENT</b>
CO TYPE	<b>CHANGE ORDER</b>
OVERRIDE	ODOT will not use this indicator. This checkbox will never be selected
APPROVAL RULES	
EMERGENCY WORK	ODOT will not use this indicator. This checkbox will never be selected
Overrun/ Underrun	Leave Unchecked
Extra Work	<b>CHECK</b>
Time Adjustment	Leave Unchecked
Force Account	WILL NOT BE USED
Zero Dollar	Leave Unchecked
Final Quantity	Leave Unchecked
Dispute	Please fill in with the appropriate Dispute Tracking number. If no Dispute has been created please leave blank.
Force Account	ODOT will not use this indicator. This checkbox will never be selected

# CHANGE ORDERS



MATERIAL DEDUCTION CHANGE ORDER

A.1

ATTACHMENTS



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CHANGE ORDERS / CHANGE ORDER MAINTENANCE

PAGE 8

# CHANGE ORDERS

A.1(2)

## MATERIAL DEDUCTION CHANGE ORDER

### STEP

2

Entering in Item Information



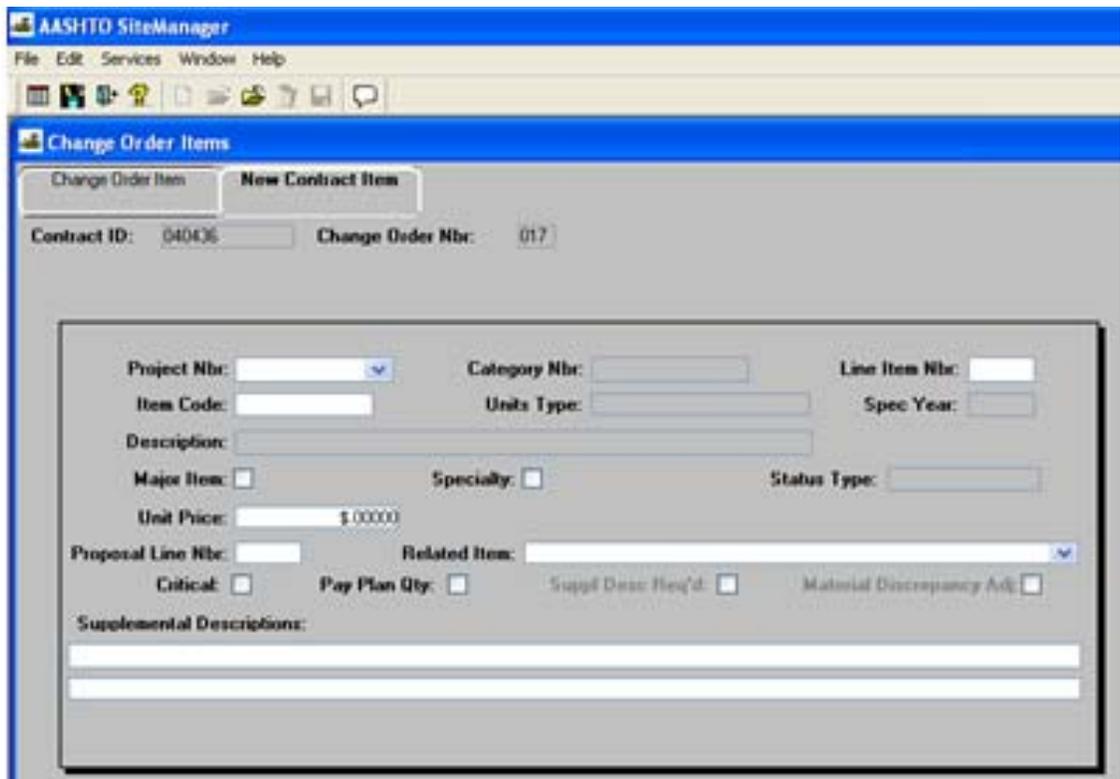
### USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



### SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance / Items / New Contract Item Tab



# CHANGE ORDERS

II

## MATERIAL DEDUCTION CHANGE ORDER

A.1(2)

### ENTERED INFORMATION



FIELD	Change Order Item—New Contract Item Tab
<b>Project Number</b>	The correct project number which applies to the new contract item shall be selected from the drop down box.
<b>Category Number</b>	Will be the category of the Failing Material. i.e. Failing Concrete for Bridge Deck will be under the Bridge Category.
<b>Line Number</b>	The first New Contract Item added to a contract shall be given a line number of 8000. The second new contract item added to a contract shall be given a line number of 8001, and so on
<b>Item Code</b>	<b>105 XXXX</b>
<b>Major Item</b>	Unchecked
<b>Specialty Item</b>	Unchecked
<b>Unit Price</b>	<b>ENTER THE UNIT PRICE AS SHOWN IN THE MATERIAL DEDUCTION CALCULATION SHEET ATTACHED TO THE HEADER.</b>
<b>Proposal Line Number</b>	Will be the Same as the Line Number
<b>Related Item</b>	<b>FAILING MATERIAL DEDUCTION</b>
<b>Critical</b>	This checkbox will not be used. Do not check this box.
<b>Play Plan Quantity</b>	If the new contract item is to be paid on a plan quantity basis, check this box.
<b>Material Adjustment Discrepancy</b>	Always check this box.
<b>Supplemental Description</b>	Failing material deduction pay items are those pay items that have been given the description "Deduction For Failing Material". Refer to Section 702.4, Line Item Adjustments for information concerning the appropriate use of this pay item type. A supplemental pay item description shall be included to properly identify the deduction. Example: You have sampled Asphalt Concrete, Type A material produced by the contractor and have found that the gradation for that material did not meet specification requirements. You intend to impose a deduction to the contract, through a change order, for this deficiency. You create a change order and select the "Deduction For Failing Material" pay item with ton units. To distinguish this "Deduction For Failing Material" pay item from all other "Deduction For Failing Material" items that may be on a contract, you indicate in the supplemental pay item description line - "Asphalt Concrete, Type A Gradation"

# CHANGE ORDERS

A.1(3)

## MATERIAL DEDUCTION CHANGE ORDER

### STEP

3

Entering in Item Information concerning this change order



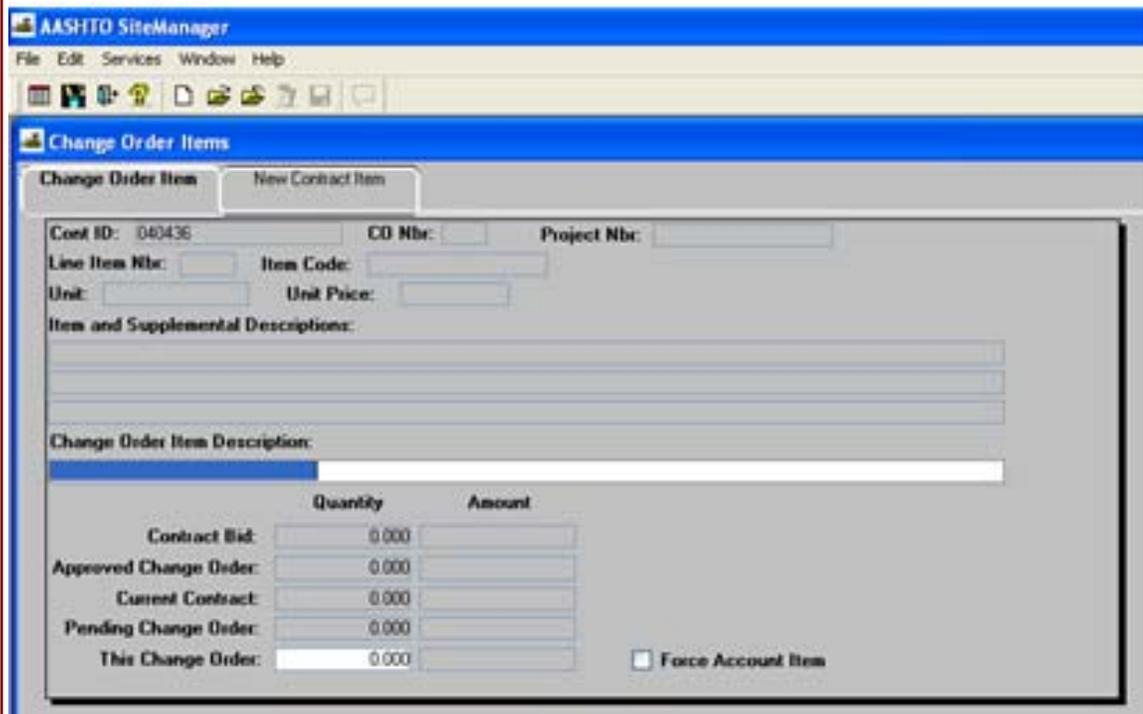
### USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



### SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance / Items / Change Order Item Tab



# CHANGE ORDERS



## MATERIAL DEDUCTION CHANGE ORDER

A.1(3)

### ENTERED INFORMATION



FIELD	Change Order Item—Change Order Item Tab
Change Order Description	Added Detail concerning Material Deduction i.e. for Drill Shaft.
This Change Order	Will be the Quantity
Force Account Item	Will be Unchecked

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CHANGE ORDERS / CHANGE ORDER MAINTENANCE

**STEP****4**

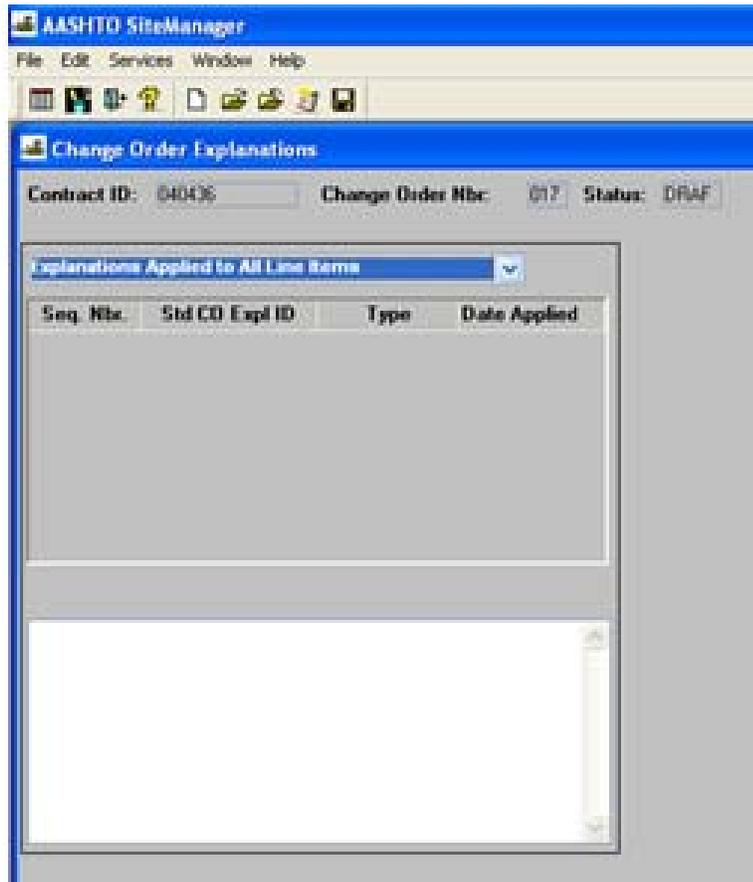
Entering in Item Explanations

**USER**

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		

**SCREENSHOT**

Go to Main Panel / Change Order/ Change Order Maintenance /  
Change Order Explanations



# CHANGE ORDERS

II

## MATERIAL DEDUCTION CHANGE ORDER

A.1(4)

### ENTERED INFORMATION



FIELD	Change Order Item—Change Order Item Tab
General Explanations	A general explanation shall be created to establish the overall intent of the change. The author of the change order may create their own general explanation or utilize the standard change order explanations available in the system. Refer to Section 803.3, Standard Explanations for a complete listing of the standard explanation available and for the instances where the use of a standard explanation is mandatory.
Specific Line Item Explanations	Specific line item explanations shall be created for each change order item. The author of the change order may create their own specific line item explanations or utilize the standard change order explanations available in the system.  Refer to Section 803.3, Standard Explanations for a complete listing of the standard explanation available and for the instances where the use of a standard explanation is mandatory.

# CHANGE ORDERS

A.1 (5)

## MATERIAL DEDUCTION CHANGE ORDER

### STEP

5

Recalculate Change Order



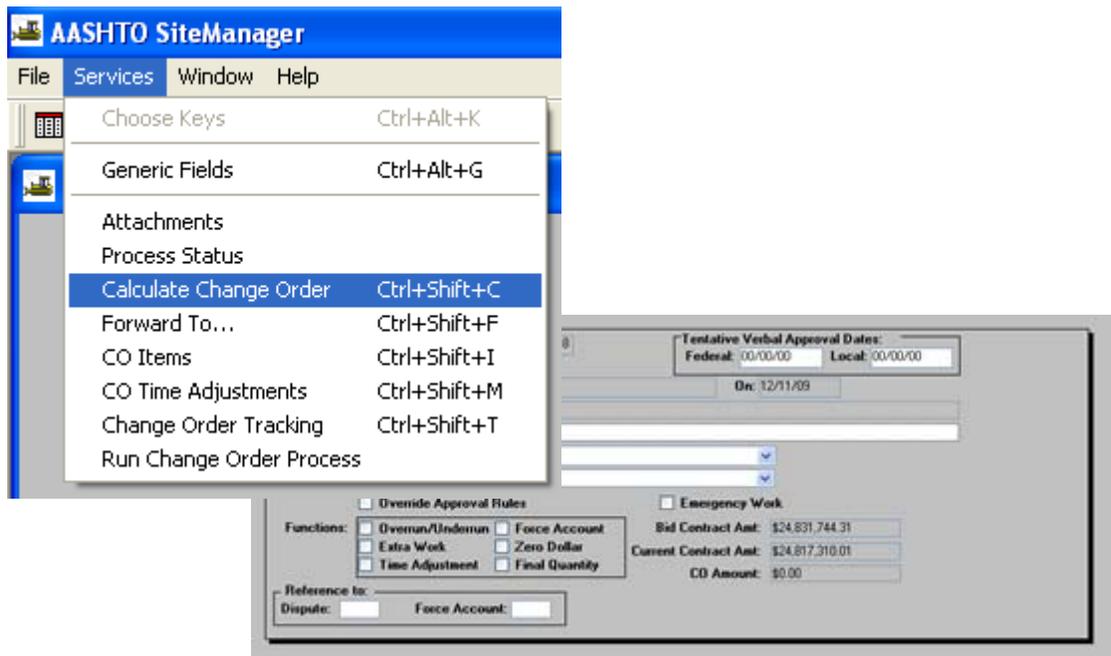
### USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



### SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance / Header



From the Top Menu Select Services then Calculate Change Order.

Your Change order is ready for the Review or Approval Process Which is covered in Section B of this Manual.

# CHANGE ORDERS



MATERIAL DEDUCTION CHANGE ORDER

A.1

NOTES



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CHANGE ORDERS / CHANGE ORDER MAINTENANCE

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# CHANGE ORDERS

**PROCESS**

Creating a Incentive Pay Change Order

**STEPS**

- ◆ 1. ENTERING IN THE HEADER
- ◆ 2. ENTERING IN NEW ITEM INFORMATION
- ◆ 3. ENTERING IN CHANGE ORDER ITEM INFORMATION
- ◆ 4. ENTERING IN GENERAL AND ITEM EXPLANATION
- ◆ 5. RECALCULATING CHANGE ORDER

# CHANGE ORDERS



## ADDING FUNDING FOR INCENTIVE PAY

A.2 (1)

### STEP

1

Entering in Header Information.

### USER



GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		

### SCREENSHOT



Go to Main Panel / Change Order/ Change Order Maintenance / Header

The screenshot shows a software interface for entering change order header information. It includes fields for Contract ID (040436), CD Number (018), and Tentative Verbal Approval Dates (Federal: 00/00/00, Local: 00/00/00). The CD was created by Wilson, Antonella C. on 12/11/09. The status is Draft and the approval level is set. The description field is highlighted in blue. There are dropdown menus for Reason Code and CD Type. Checkboxes are provided for Override Approval Rules, Emergency Work, and various functions like Overrun/Underman, Force Account, Extra Work, Zero Dollar, Time Adjustment, and Final Quantity. Contract amounts are displayed: Bid Contract Amt: \$24,831,744.31, Current Contract Amt: \$24,817,310.01, and CD Amount: \$0.00. Reference fields for Dispute and Force Account are also present.

# CHANGE ORDERS

A.2(1)

## ADDING FUNDING FOR INCENTIVE PAY

### ENTERED INFORMATION

FIELD	
FEDERAL	For those contracts which require Federal Oversight, enter the date that the change was granted verbal approval by the FHWA.
LOCAL	For those contracts which are Local Government projects, enter the date that the Local Government entity was notified of the pending change order.
DESCRIPTION	<b>"INCENTIVE PAY FOR _____"</b>
REASON CODE	<b>SITE REQUIREMENT</b>
CO TYPE	<b>CHANGE ORDER</b>
OVERRIDE	ODOT will not use this indicator. This checkbox will never be selected
APPROVAL RULES	
EMERGENCY WORK	ODOT will not use this indicator. This checkbox will never be selected
Overrun/ Underrun	Leave Unchecked
Extra Work	<b>CHECK</b>
Time Adjustment	Leave Unchecked
Force Account	WILL NOT BE USED
Zero Dollar	Leave Unchecked
Final Quantity	Leave Unchecked
Dispute	Please fill in with the appropriate Dispute Tracking number. If no Dispute has been created please leave blank.
Force Account	ODOT will not use this indicator. This checkbox will never be selected

# CHANGE ORDERS



ADDING FUNDING FOR INCENTIVE PAY

A.2(1)

ATTACHMENTS



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CHANGE ORDERS / CHANGE ORDER MAINTENANCE

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# CHANGE ORDERS

A.2(2)

ADDING FUNDING FOR INCENTIVE PAY

## STEP

2

Entering in Item Information



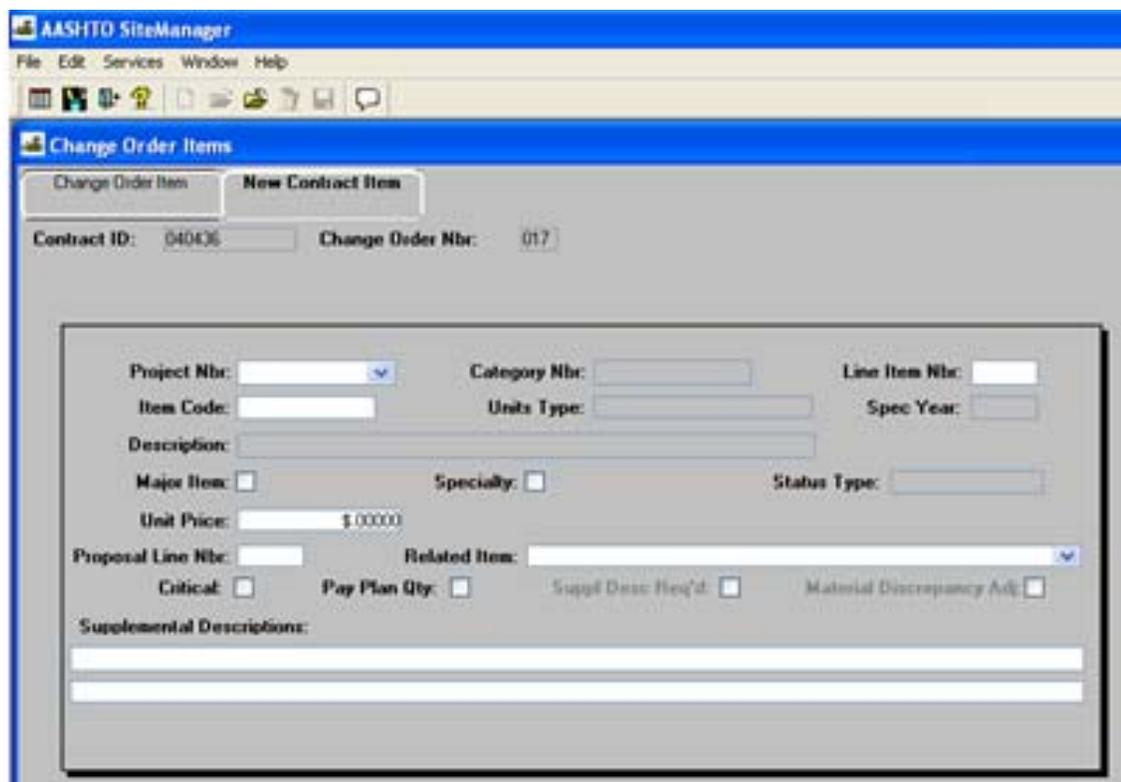
## USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



## SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance / Items / New Contract Item Tab



# CHANGE ORDERS

II

## ADDING FUNDING FOR INCENTIVE PAY

A.2 (2)

### ENTERED INFORMATION



FIELD	Change Order Item—New Contract Item Tab
Project Number	The correct project number which applies to the new contract item shall be selected from the drop down box.
Category Number	Will be the category that relates to the incentive i.e. Roadway or Bridge
Line Number	The first New Contract Item added to a contract shall be given a line number of 8000. The second new contract item added to a contract shall be given a line number of 8001, and so on
Item Code	<b>644 XXXX</b>
Major Item	Unchecked
Specialty Item	unchecked
Unit Price	<b>ENTER THE UNIT PRICE AS SHOWN IN THE SPECIAL PROVISIONS AND ON SHEET ATTACHED TO THE HEADER.</b>
Proposal Line Number	Will be the Same as the Line Number
Related Item	<b>STANDARD PAY ITEM</b>
Critical	This checkbox will not be used. Do not check this box.
Play Plan Quantity	If the new contract item is to be paid on a plan quantity basis, check this box.
Material	Always check this box.
Adjustment Discrepancy	
Supplemental Description	

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CHANGE ORDERS / CHANGE ORDER MAINTENANCE

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# CHANGE ORDERS

A.2 (3)

ADDING FUNDING FOR INCENTIVE PAY

## STEP

3

Entering in Item Information concerning this change order



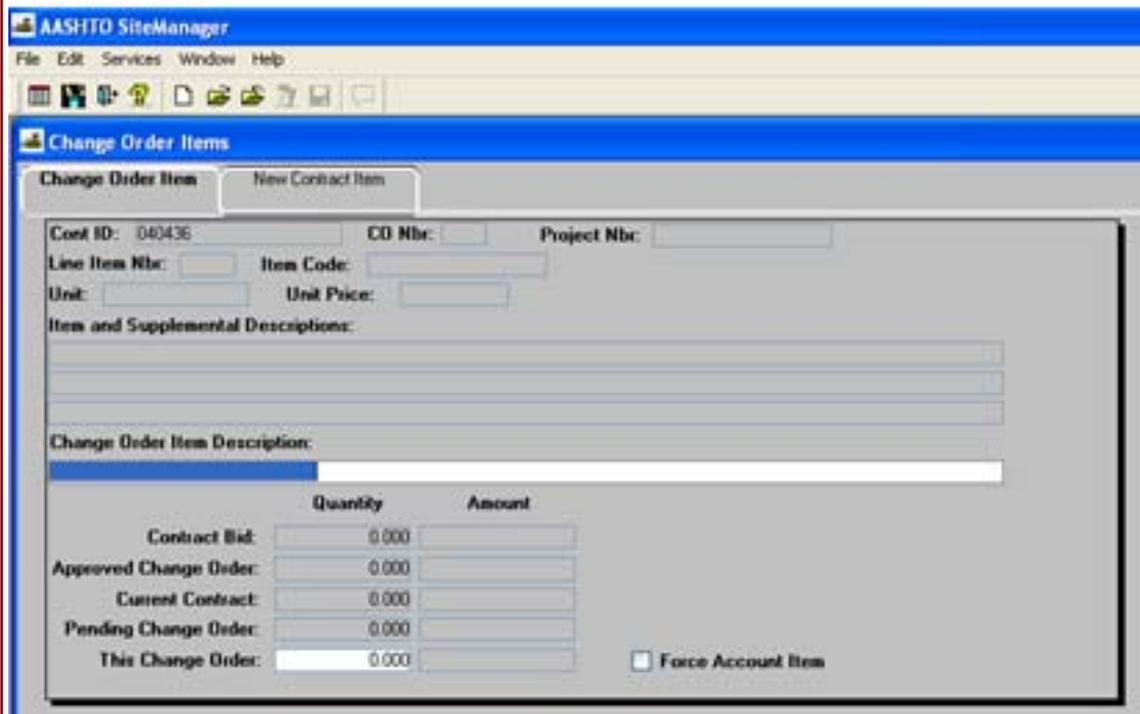
## USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



## SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance / Items / Change Order Item Tab



# CHANGE ORDERS



## ADDING FUNDING FOR INCENTIVE PAY

A.2 (3)



### ENTERED INFORMATION

FIELD	Change Order Item—Change Order Item Tab
<b>Change Order Description</b>	Added Detail concerning Material Deduction i.e. for Drill Shaft.
<b>This Change Order</b>	Will be the Quantity
<b>Force Account Item</b>	Will be Unchecked

# CHANGE ORDERS

A.2 (4)

ADDING FUNDING FOR INCENTIVE PAY

## STEP

4

Entering in Item Explanations



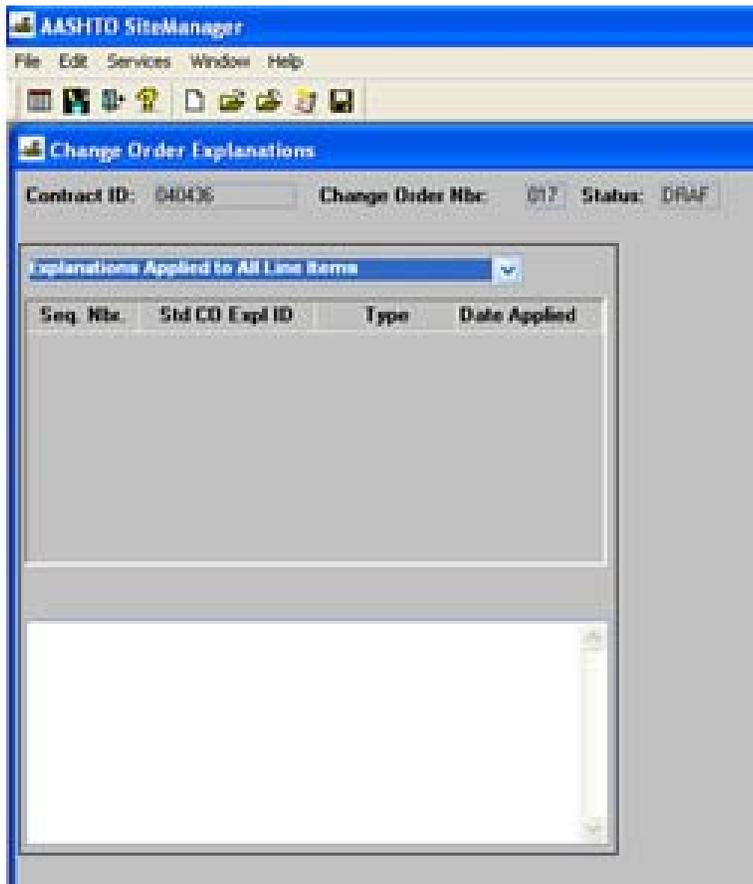
## USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



## SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance /  
Change Order Explanations



# CHANGE ORDERS



## ADDING FUNDING FOR INCENTIVE PAY

A.2 (4)

### ENTERED INFORMATION



FIELD	Change Order Item—Change Order Item Tab
<b>General Explanations</b>	A general explanation shall be created to establish the overall intent of the change. The author of the change order may create their own general explanation or utilize the standard change order explanations available in the system. Refer to Section 803.3, Standard Explanations for a complete listing of the standard explanation available and for the instances where the use of a standard explanation is mandatory.
<b>Specific Line Item Explanations</b>	Specific line item explanations shall be created for each change order item. The author of the change order may create their own specific line item explanations or utilize the standard change order explanations available in the system.  Refer to Section 803.3, Standard Explanations for a complete listing of the standard explanation available and for the instances where the use of a standard explanation is mandatory.

# CHANGE ORDERS

A.2 (5)

ADDING FUNDING FOR INCENTIVE PAY

## STEP

5

Recalculate Change Order

## USER

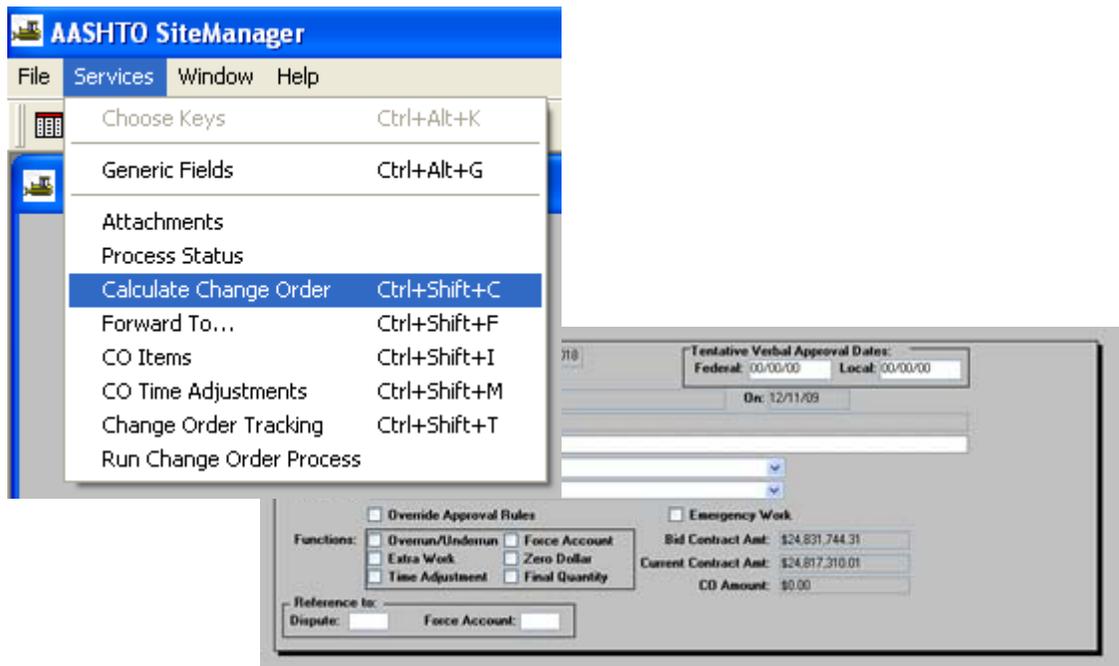


GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



## SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance / Header



From the Top Menu Select Services then Calculate Change Order.

Your Change order is ready for the Review or Approval Process Which is covered in Section B of this Manual.

# CHANGE ORDERS



ADDING FUNDING FOR INCENTIVE PAY

A.2

NOTES



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CHANGE ORDERS / CHANGE ORDER MAINTENANCE

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**PROCESS**

Creating a Zero Dollar Change Order without Items Change Order

**STEPS**

- ◆ 1. ENTERING IN THE HEADER
- ◆ 2. ENTERING IN GENERAL EXPLANATION
- ◆ 5. RECALCULATING CHANGE ORDER

# CHANGE ORDERS



## ZERO DOLLAR CHANGE ORDER WITHOUT ITEMS

A.3 (1)

### STEP

1

Entering in Header Information.

### USER



GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		

### SCREENSHOT



Go to Main Panel / Change Order/ Change Order Maintenance / Header

The screenshot shows a software interface for entering change order header information. It includes fields for Contract ID (040436), CD Number (018), and Tentative Verbal Approval Dates (Federal: 00/00/00, Local: 00/00/00). Other fields include CD Created by (Wilson, Antonetta C.), Date (12/11/09), Status (Draft), and Approval Level. There are dropdown menus for Description, Reason Code, and CD Type. Checkboxes are present for Override Approval Rules, Emergency Work, and various Functions (Overrun/Underrun, Force Account, Extra Work, Zero Dollar, Time Adjustment, Final Quantity). Financial fields show Bid Contract Amt (\$24,831,744.31), Current Contract Amt (\$24,817,310.01), and CD Amount (\$0.00). Reference fields for Dispute and Force Account are also visible.

# CHANGE ORDERS

A.3 (1)

ZERO DOLLAR CHANGE ORDER WITHOUT ITEMS

## ENTERED INFORMATION

FIELD	
FEDERAL	For those contracts which require Federal Oversight, enter the date that the change was granted verbal approval by the FHWA.
LOCAL	For those contracts which are Local Government projects, enter the date that the Local Government entity was notified of the pending change order.
DESCRIPTION	<b>"ADDING SPECIAL PROVISION" OR CHANGING ITEM TO PAY PLAN QUANTITY</b>
REASON CODE	<b>SITE REQUIREMENT, SCOPE, OR ENGINEERING ERROR /OMMISSION</b>
CO TYPE	<b>CHANGE ORDER</b>
OVERRIDE	ODOT will not use this indicator. This checkbox will never be selected
APPROVAL RULES	
EMERGENCY WORK	ODOT will not use this indicator. This checkbox will never be selected
Overrun/ Underrun	Leave Unchecked
Extra Work	Leave Unchecked
Time Adjustment	Leave Unchecked
Force Account	WILL NOT BE USED
Zero Dollar	<b>CHECKED</b>
Final Quantity	Leave Unchecked
Dispute	Please fill in with the appropriate Dispute Tracking number. If no Dispute has been created please leave blank.
Force Account	ODOT will not use this indicator. This checkbox will never be selected

# CHANGE ORDERS



ZERO DOLLAR CHANGE ORDER WITHOUT ITEMS

A.3 (1)

ATTACHMENTS



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CHANGE ORDERS / CHANGE ORDER MAINTENANCE

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# CHANGE ORDERS

A.3 (2)

ZERO DOLLAR CHANGE ORDER WITHOUT ITEMS

## STEP

2

Entering in Item Explanations



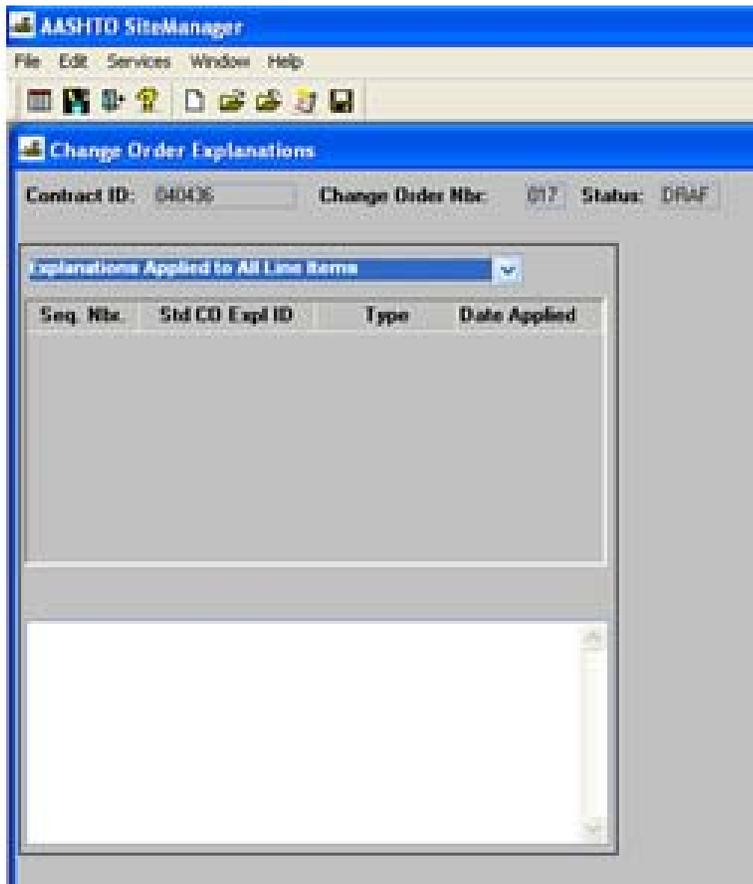
## USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



## SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance /  
Change Order Explanations



# CHANGE ORDERS

II

## ZERO DOLLAR CHANGE ORDER WITHOUT ITEMS

A.3 (2)

### ENTERED INFORMATION



FIELD	Change Order Item—Change Order Item Tab
General Explanations	A general explanation shall be created to establish the overall intent of the change. The author of the change order may create their own general explanation or utilize the standard change order explanations available in the system. Refer to Section 803.3, Standard Explanations for a complete listing of the standard explanation available and for the instances where the use of a standard explanation is mandatory.
Specific Line Item Explanations	NONE

# CHANGE ORDERS

A.3 (3)

## ZERO DOLLAR CHANGE ORDER WITHOUT ITEMS

### STEP

3

Recalculate Change Order



### USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



### SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance / Header

The screenshot displays the AASHTO SiteManager application window. The 'Services' menu is open, highlighting 'Calculate Change Order' (Ctrl+Shift+C). Other menu items include 'Choose Keys', 'Generic Fields', 'Attachments', 'Process Status', 'Forward To...', 'CO Items', 'CO Time Adjustments', 'Change Order Tracking', and 'Run Change Order Process'. The background shows a form with the following fields:

- Tentative Verbal Approval Dates: Federal: 00/00/00, Local: 00/00/00
- On: 12/31/09
- Functions:
  - Override Approval Rules
  - Overrun/Underman
  - Force Account
  - Extra Work
  - Zero Dollar
  - Time Adjustment
  - Final Quantity
- Emergency Work:
- Bid Contract Amt: \$24,831,744.31
- Current Contract Amt: \$24,817,310.01
- CO Amount: \$0.00
- Reference to: Dispute:  Force Account:

From the Top Menu Select Services then Calculate Change Order.

Your Change order is ready for the Review or Approval Process Which is covered in Section B of this Manual.

# CHANGE ORDERS



ZERO DOLLAR CHANGE ORDER WITHOUT ITEMS

A.3

NOTES



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CHANGE ORDERS / CHANGE ORDER MAINTENANCE

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**PROCESS**

Creating a Zero Dollar Change Order with Items Change Order

**STEPS**

- ◆ 1. ENTERING IN THE HEADER
- ◆ 2. ENTERING IN NEW ITEM INFORMATION
- ◆ 3. ENTERING IN NEW CHANGE ORDER ITEM INFORMATION
- ◆ 4. ENTERING IN EXISTING ITEM FROM CONTRACT
- ◆ 5. ENTERING IN GENERAL AND ITEM EXPLANATION
- ◆ 6. RECALCULATING CHANGE ORDER

# CHANGE ORDERS



## ZERO DOLLAR CHANGE ORDER WITH ITEMS

A.4 (1)

### STEP

1

Entering in Header Information.

### USER



GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		

### SCREENSHOT



Go to Main Panel / Change Order/ Change Order Maintenance / Header

The screenshot shows a software interface for entering change order header information. It includes fields for Contract ID (040436), CD Number (018), and Tentative Verbal Approval Dates (Federal: 00/00/00, Local: 00/00/00). The user is identified as Wilson, Antonella C., and the date is 12/11/09. The status is 'Draft' and the approval level is set. The description field is highlighted in blue. There are dropdown menus for Reason Code and CD Type. Checkboxes are present for 'Override Approval Rules', 'Emergency Work', and 'Functions' (Overman/Underman, Extra Work, Time Adjustment, Force Account, Zero Dollar, Final Quantity). Contract amounts are displayed: Bid Contract Amt: \$24,831,744.31, Current Contract Amt: \$24,817,310.01, and CD Amount: \$0.00. Reference fields for Dispute and Force Account are also visible.

# CHANGE ORDERS

A.4

ZERO DOLLAR CHANGE ORDER WITH ITEMS

1

## ENTERED INFORMATION

FIELD	
FEDERAL	For those contracts which require Federal Oversight, enter the date that the change was granted verbal approval by the FHWA.
LOCAL	For those contracts which are Local Government projects, enter the date that the Local Government entity was notified of the pending change order.
DESCRIPTION	<b>BRIEF DESCRIPTION INCLUDING SCOPE OF WORK</b>
REASON CODE	<b>SITE REQUIREMENT, SCOPE, OR ENGINEERING ERROR /OMMISSION</b>
CO TYPE	<b>CHANGE ORDER OR SUPPLEMENTAL AGREEMENT</b>
OVERRIDE APPROVAL RULES	ODOT will not use this indicator. This checkbox will never be selected
EMERGENCY WORK	ODOT will not use this indicator. This checkbox will never be selected
Overrun/ Underrun	<b>CHECK</b>
Extra Work	<b>CHECK</b>
Time Adjustment	Leave Unchecked
Force Account	WILL NOT BE USED
Zero Dollar	Leave Unchecked
Final Quantity	Leave Unchecked
Dispute	Please fill in with the appropriate Dispute Tracking number. If no Dispute has been created please leave blank.
Force Account	ODOT will not use this indicator. This checkbox will never be selected

# CHANGE ORDERS



ZERO DOLLAR CHANGE ORDER WITH ITEMS

A.4

ATTACHMENTS



AUTHORIZED BY CONSTRUCTION DIVISION ON 1 AUGUST 2010

CHANGE ORDERS / CHANGE ORDER MAINTENANCE

PAGE 40

# CHANGE ORDERS

A.4 (2)

ZERO DOLLAR CHANGE ORDER WITH ITEMS

## STEP

2

Entering in new Item Information



## USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



## SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance / Items / New Contract Item Tab

# CHANGE ORDERS



## ZERO DOLLAR CHANGE ORDER WITH ITEMS

A.4 (2)

### ENTERED INFORMATION



FIELD	Change Order Item—New Contract Item Tab
<b>Project Number</b>	The correct project number which applies to the new contract item shall be selected from the drop down box.
<b>Category Number</b>	Will be the category that relates to the item i.e. Roadway or Bridge. If new items are non-participation, the category will be added by Construction Division.
<b>Line Number</b>	The first New Contract Item added to a contract shall be given a line number of 8000. The second new contract item added to a contract shall be given a line number of 8001, and so on
<b>Item Code</b>	When adding new items select the appropriate item code and specification year.
<b>Major Item</b>	Unchecked
<b>Specialty Item</b>	unchecked
<b>Unit Price</b>	
<b>Proposal Line Number</b>	Will be the Same as the Line Number
<b>Related Item</b>	<b>STANDARD ITEM</b>
<b>Critical</b>	This checkbox will not be used. Do not check this box.
<b>Play Plan Quantity</b>	If the new contract item is to be paid on a plan quantity basis, check this box.
<b>Material Adjustment Discrepancy</b>	Always check this box.
<b>Supplemental Description</b>	If using construction miscellaneous, please add a description.

# CHANGE ORDERS

A.4 (3)

ZERO DOLLAR CHANGE ORDER WITH ITEMS

## STEP

3

Entering in new Item Information concerning this change order



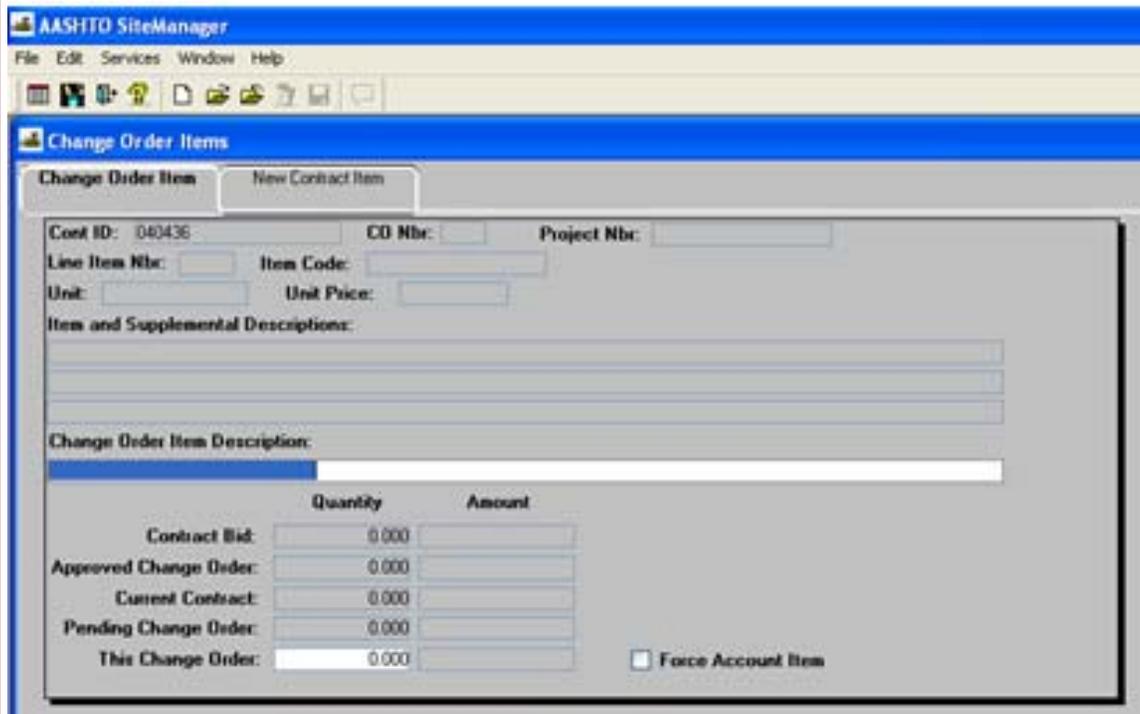
## USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



## SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance / Items / Change Order Item Tab



# CHANGE ORDERS



## ZERO DOLLAR CHANGE ORDER WITH ITEMS

A.4 (3)



### ENTERED INFORMATION

FIELD	Change Order Item—Change Order Item Tab
<b>Change Order Description</b>	If using construction miscellaneous, include sufficient detail to describe work being performed. If applying a unit price adjustment indicate it here.
<b>This Change Order</b>	Will be the Quantity
<b>Force Account Item</b>	Will be Unchecked

# CHANGE ORDERS

A.4(4)

## ZERO DOLLAR CHANGE ORDER WITH ITEMS

### STEP

4

Entering in existing Item Information concerning this change order



### USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



### SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance / Items / Change Order Item Tab

Add Item from a list of existing pay items– be sure to select appropriate item and specification year.

The screenshot shows the AASHTO SiteManager application window. The 'Services' menu is open, and the 'CO Items' option is highlighted. The menu items and their keyboard shortcuts are as follows:

- Choose Keys: Ctrl+Alt+K
- Generic Fields: Ctrl+Alt+G
- Attachments
- Process Status
- Calculate Change Order: Ctrl+Shift+C
- Forward To...: Ctrl+Shift+F
- CO Items: Ctrl+Shift+I**
- CO Time Adjustments: Ctrl+Shift+M
- Change Order Tracking: Ctrl+Shift+T
- Run Change Order Process

In the background, a form titled 'Item and Supplemental Descriptions' is visible, featuring a table for 'Change Order Item Description' with columns for 'Quantity' and 'Amount'. The table contains the following data:

	Quantity	Amount
Contract Bid:	0.000	
Approved Change Order:	0.000	
Current Contract:	0.000	
Pending Change Order:	0.000	
This Change Order:	0.000	

There is also a checkbox labeled 'Force Account Item' at the bottom right of the form.

# CHANGE ORDERS



## ZERO DOLLAR CHANGE ORDER WITH ITEMS

A.4 (4)



### NOTES

FIELD	Change Order Item—Change Order Item Tab
<b>Change Order Description</b>	If using construction miscellaneous, include sufficient detail to describe work being performed. If applying a unit price adjustment indicate it here.
<b>This Change Order</b>	Will be the Quantity
<b>Force Account Item</b>	Will be Unchecked

# CHANGE ORDERS

A.4 (5)

ZERO DOLLAR CHANGE ORDER WITH ITEMS

## STEP

5

Entering in Item Explanations



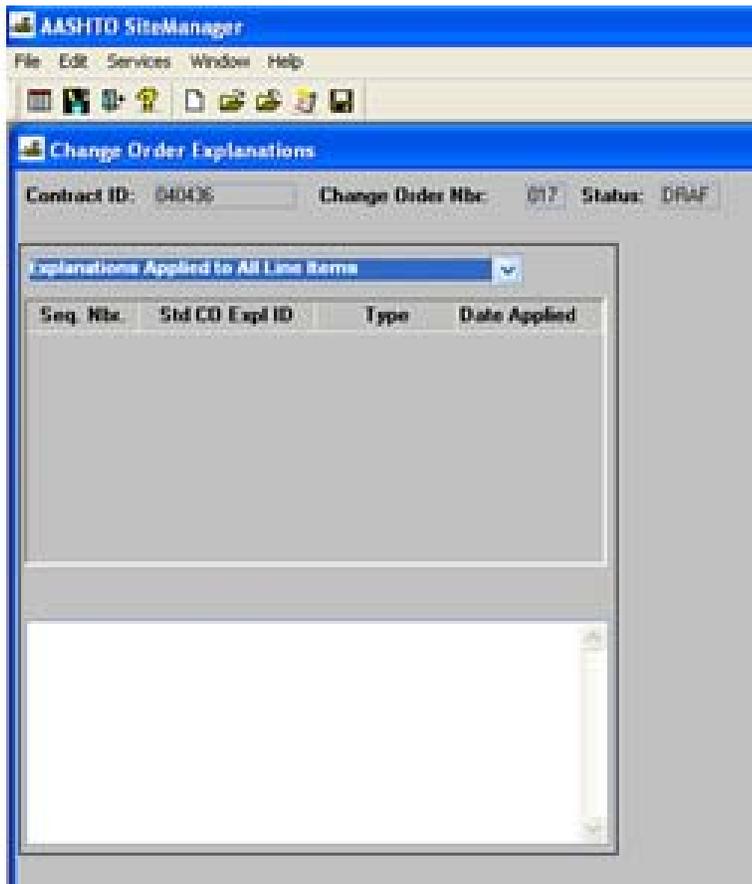
## USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



## SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance /  
Change Order Explanations



# CHANGE ORDERS



## ZERO DOLLAR CHANGE ORDER WITH ITEMS

A.4 (5)



### ENTERED INFORMATION

FIELD	Change Order Item—Change Order Item Tab
General Explanations	<p>A general explanation shall be created to establish the overall intent of the change. The author of the change order may create their own general explanation or utilize the standard change order explanations available in the system. Refer to Section 803.3, Standard Explanations for a complete listing of the standard explanation available and for the instances where the use of a standard explanation is mandatory.</p>
Specific Line Item Explanations	<p>Specific line item explanations shall be created for each change order item. The author of the change order may create their own specific line item explanations or utilize the standard change order explanations available in the system.</p> <p>Refer to Section 803.3, Standard Explanations for a complete listing of the standard explanation available and for the instances where the use of a standard explanation is mandatory.</p>

# CHANGE ORDERS

A.4 (6)

## ZERO DOLLAR CHANGE ORDER WITH ITEMS

### STEP

6

Recalculate Change Order



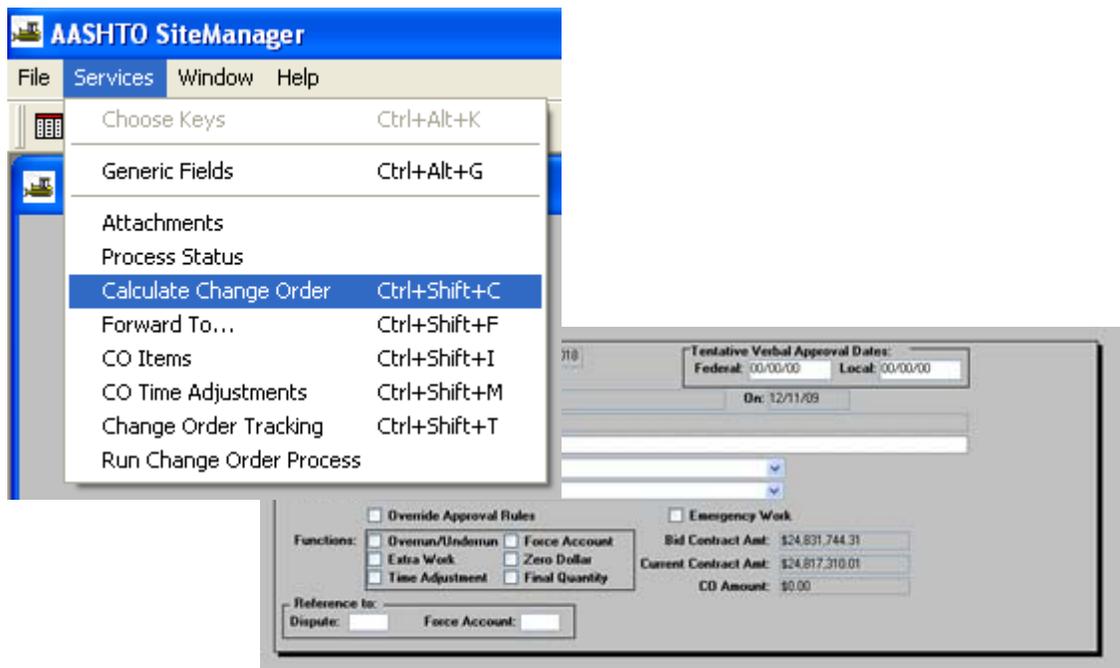
### USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



### SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance / Header



From the Top Menu Select Services then Calculate Change Order. CO Amount should be Zero.

Your Change order is ready for the Review or Approval Process Which is covered in Section B of this Manual.

# CHANGE ORDERS



ZERO DOLLAR CHANGE ORDER WITH ITEMS

A.4

NOTES



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CHANGE ORDERS / CHANGE ORDER MAINTENANCE

PAGE 50

**PROCESS**

Creating a Overrun / Underrun Change Order

**STEPS**

- ◆ 1. ENTERING IN THE HEADER
- ◆ 2. ENTERING IN EXISTING ITEM FROM CONTRACT
- ◆ 3. ENTERING IN GENERAL AND ITEM EXPLANATION
- ◆ 4. RECALCULATING CHANGE ORDER

# CHANGE ORDERS



OVERRUN / UNDERRUN

A.5 (1)

## STEP

1

Entering in Header Information.

## USER



GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		

## SCREENSHOT



Go to Main Panel / Change Order/ Change Order Maintenance / Header

The screenshot shows a software interface for entering change order header information. It includes fields for Contract ID (040436), CD Number (018), and Tentative Verbal Approval Dates (Federal: 00/00/00, Local: 00/00/00). The CD was created by Wilson, Antonella C. on 12/11/09. The status is Draft and the approval level is set. The description field is highlighted in blue. There are dropdown menus for Reason Code and CD Type. Checkboxes are provided for Override Approval Rules, Emergency Work, and various functions like Overrun/Underrun, Force Account, Extra Work, Zero Dollar, Time Adjustment, and Final Quantity. Contract amounts are displayed: Bid Contract Amt: \$24,831,744.31, Current Contract Amt: \$24,817,310.01, and CD Amount: \$0.00. Reference fields for Dispute and Force Account are also present.

# CHANGE ORDERS

A.5 (1)

OVERRUN / UNDERRUN

## ENTERED INFORMATION

FIELD	
FEDERAL	For those contracts which require Federal Oversight, enter the date that the change was granted verbal approval by the FHWA.
LOCAL	For those contracts which are Local Government projects, enter the date that the Local Government entity was notified of the pending change order.
DESCRIPTION	<b>BRIEF DESCRIPTION INCLUDING SCOPE OF WORK</b>
REASON CODE	<b>SITE REQUIREMENT, SCOPE, OR ENGINEERING ERROR /OMMISSION</b>
CO TYPE	<b>CHANGE ORDER, SUPPLEMENTAL AGREEMENT, OR UNILATERAL CHANGE ORDER</b>
OVERRIDE APPROVAL RULES	ODOT will not use this indicator. This checkbox will never be selected
EMERGENCY WORK	ODOT will not use this indicator. This checkbox will never be selected
Overrun/ Underrun	<b>CHECK</b>
Extra Work	Leave Unchecked
Time Adjustment	Leave Unchecked
Force Account	WILL NOT BE USED
Zero Dollar	Leave Unchecked
Final Quantity	Leave Unchecked
Dispute	Please fill in with the appropriate Dispute Tracking number. If no Dispute has been created please leave blank.
Force Account	ODOT will not use this indicator. This checkbox will never be selected

# CHANGE ORDERS



OVERRUN / UNDERRUN

A.5 (1)

ATTACHMENTS



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CHANGE ORDERS / CHANGE ORDER MAINTENANCE

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# CHANGE ORDERS

A.5 (2)

OVERRUN / UNDERRUN

## STEP

2

Entering in existing Item Information for this change order



## USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



## SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance / Items / Change order Item Tab

Add Item from a list of existing pay items

The screenshot shows the AASHTO SiteManager application. The 'Services' menu is open, with 'CO Items' highlighted. The background window displays a table for change order amounts:

	Quantity	Amount
Contract Bid:	0.000	
Approved Change Order:	0.000	
Current Contract:	0.000	
Pending Change Order:	0.000	
This Change Order:	0.000	

There is also a checkbox labeled 'Force Account Item' at the bottom right of the background window.

# CHANGE ORDERS

II

OVERRUN / UNDERRUN

A.5 (2)

## ENTERED INFORMATION



FIELD	Change Order Item—Change Order Item Tab
<b>Change Order Description</b>	If using construction miscellaneous, include sufficient detail to describe work being performed. If applying a unit price adjustment indicate it here.
<b>This Change Order</b>	Will be the Quantity
<b>Force Account Item</b>	Will be Unchecked

# CHANGE ORDERS

A.5 (3)

OVERRUN / UNDERRUN

## STEP

3

Entering in Item Explanations



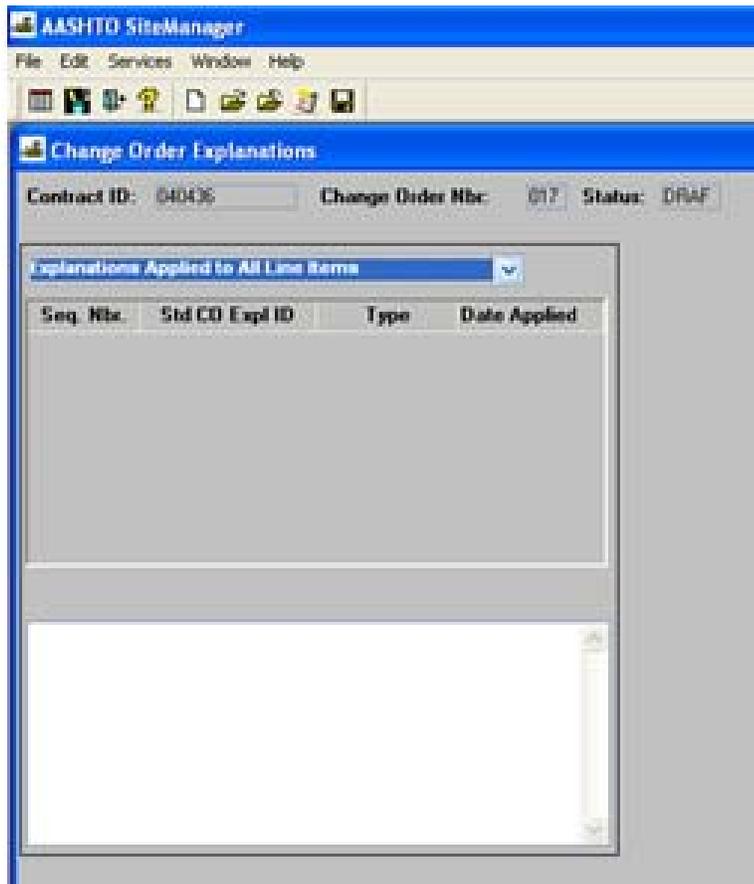
## USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



## SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance / Change Order Explanations



# CHANGE ORDERS



OVERRUN / UNDERRUN

A.5 (3)



## ENTERED INFORMATION

FIELD	Change Order Item—Change Order Item Tab
<b>General Explanations</b>	<p>A general explanation shall be created to establish the overall intent of the change. The author of the change order may create their own general explanation or utilize the standard change order explanations available in the system. Refer to Section 803.3, Standard Explanations for a complete listing of the standard explanation available and for the instances where the use of a standard explanation is mandatory.</p>
<b>Specific Line Item Explanations</b>	<p>Specific line item explanations shall be created for each change order item. The author of the change order may create their own specific line item explanations or utilize the standard change order explanations available in the system.</p> <p>Refer to Section 803.3, Standard Explanations for a complete listing of the standard explanation available and for the instances where the use of a standard explanation is mandatory.</p>

# CHANGE ORDERS

A.5 (4)

OVERRUN / UNDERRUN

## STEP

4

Recalculate Change Order

## USER



GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		

## SCREENSHOT



Go to Main Panel / Change Order/ Change Order Maintenance / Header

The screenshot shows the AASHTO SiteManager application window. The 'Services' menu is open, and 'Calculate Change Order' is highlighted. The menu items and their shortcuts are:

- Choose Keys (Ctrl+Alt+K)
- Generic Fields (Ctrl+Alt+G)
- Attachments
- Process Status
- Calculate Change Order (Ctrl+Shift+C)**
- Forward To... (Ctrl+Shift+F)
- CO Items (Ctrl+Shift+I)
- CO Time Adjustments (Ctrl+Shift+M)
- Change Order Tracking (Ctrl+Shift+T)
- Run Change Order Process

In the background, a form is visible with fields for 'Tentative Verbal Approval Dates' (Federal: 00/00/00, Local: 00/00/00), 'On: 12/11/09', and contract amounts: Bid Contract Amt: \$24,831,744.31, Current Contract Amt: \$24,817,310.01, and CD Amount: \$0.00. There are also checkboxes for 'Override Approval Rules', 'Emergency Work', 'Force Account', 'Zero Dollar', and 'Final Quantity'.

From the Top Menu Select Services then Calculate Change Order

Your Change order is ready for the Review or Approval Process Which is covered in Section B of this Manual.

# CHANGE ORDERS



OVERRUN / UNDERRUN

A.5

NOTES



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CHANGE ORDERS / CHANGE ORDER MAINTENANCE

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**PROCESS**

Creating a Change Order with new Items

**STEPS**

- ◆ 1. ENTERING IN THE HEADER
- ◆ 2. ENTERING IN NEW ITEM INFORMATION
- ◆ 3. ENTERING IN CHANGE ORDER ITEM INFORMATION
- ◆ 4. ENTERING IN GENERAL AND ITEM EXPLANATION
- ◆ 5. RECALCULATING CHANGE ORDER

# CHANGE ORDERS



## ADDING NEW ITEMS

A.6 (1)

### STEP

1

Entering in Header Information.

### USER



GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		

### SCREENSHOT



Go to Main Panel / Change Order/ Change Order Maintenance / Header

The screenshot shows a web-based form for entering change order header information. The form includes the following fields and options:

- Contract ID: 040436
- CD Number: 018
- Tentative Verbal Approval Dates: Federal: 00/00/00, Local: 00/00/00
- CD Created by: Wilson, Antonella C.
- On: 12/11/09
- Status: Draft
- Approval Level: [dropdown]
- Description: [text field]
- Reason Code: [dropdown]
- CD Type: [dropdown]
- Override Approval Rules:
- Emergency Work:
- Functions:  Overman/Underman,  Force Account,  Extra Work,  Zero Dollar,  Time Adjustment,  Final Quantity
- Bid Contract Amt: \$24,831,744.31
- Current Contract Amt: \$24,817,310.01
- CD Amount: \$0.00
- Reference to: Dispute: [text field], Force Account: [text field]

# CHANGE ORDERS

A.6 (1)

ADDING NEW ITEMS

## ENTERED INFORMATION



FIELD	
FEDERAL	For those contracts which require Federal Oversight, enter the date that the change was granted verbal approval by the FHWA.
LOCAL	For those contracts which are Local Government projects, enter the date that the Local Government entity was notified of the pending change order.
DESCRIPTION	<b>BRIEF DESCRIPTION INCLUDING SCOPE OF WORK</b>
REASON CODE	<b>SITE REQUIREMENT, SCOPE, OR ENGINEERING ERROR /OMMISSION</b>
CO TYPE	<b>CHANGE ORDER OR SUPPLEMENTAL AGREEMENT</b>
OVERRIDE APPROVAL RULES	ODOT will not use this indicator. This checkbox will never be selected
EMERGENCY WORK	ODOT will not use this indicator. This checkbox will never be selected
Overrun/ Underrun	Leave Unchecked
Extra Work	<b>CHECK</b>
Time Adjustment	Leave Unchecked
Force Account	WILL NOT BE USED
Zero Dollar	Leave Unchecked
Final Quantity	Leave Unchecked
Dispute	Please fill in with the appropriate Dispute Tracking number. If no Dispute has been created please leave blank.
Force Account	ODOT will not use this indicator. This checkbox will never be selected

# CHANGE ORDERS



ADDING NEW ITEMS

A.6 (1)

ATTACHMENTS



AUTHORIZED BY CONSTRUCTION DIVISION ON 1 AUGUST 2010

CHANGE ORDERS / CHANGE ORDER MAINTENANCE

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# CHANGE ORDERS

A.6 (2)

ADDING NEW ITEMS

## STEP

2

Entering in Item Information



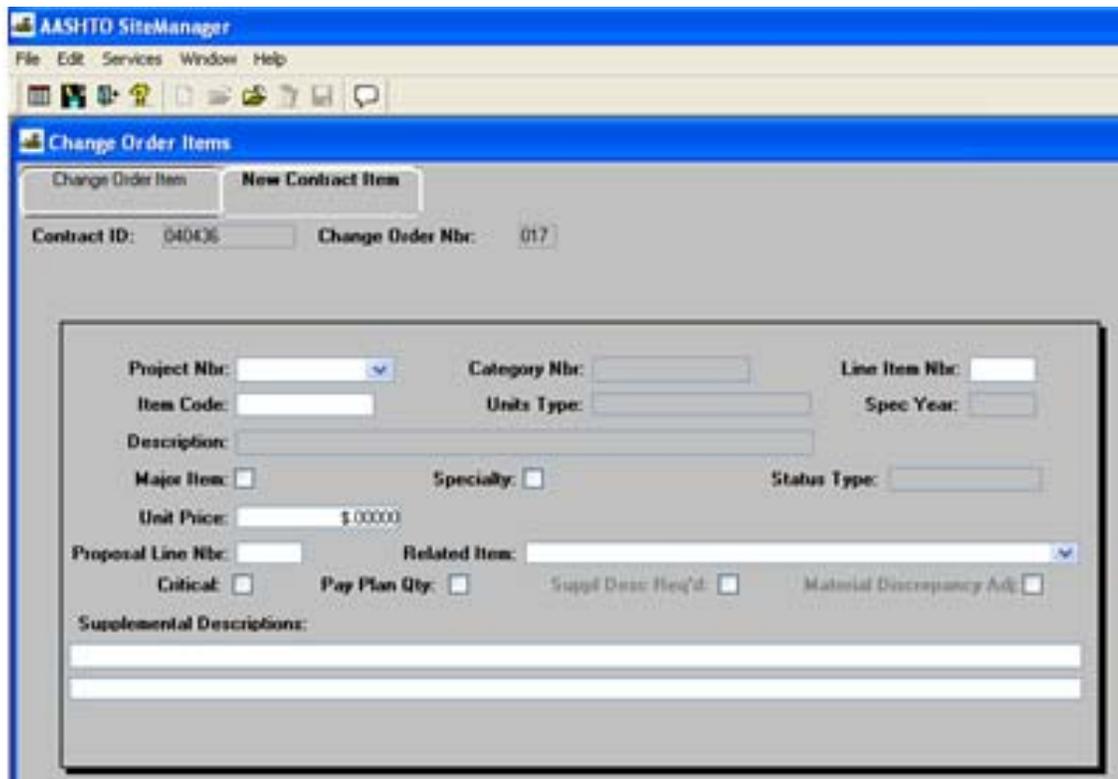
## USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



## SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance / Items / New Contract Item Tab



# CHANGE ORDERS



## ADDING NEW ITEMS

A.6 (2)

### ENTERED INFORMATION



FIELD	Change Order Item—New Contract Item Tab
<b>Project Number</b>	The correct project number which applies to the new contract item shall be selected from the drop down box.
<b>Category Number</b>	Select Category as it relates to work being performed (0100—Roadway, 0200—Bridge, etc. ) If new items are non-participation, the category will be added by Constriction Division.
<b>Line Number</b>	The first New Contract Item added to a contract shall be given a line number of 8000. The second new contract item added to a contract shall be given a line number of 8001, and so on
<b>Item Code</b>	Select the most appropriate pay item from the master list. Please check Ensih/
<b>Major Item</b>	Unchecked
<b>Specialty Item</b>	Unchecked
<b>Unit Price</b>	<b>ESTABLISHED BY NEGOTIATION OR COST BREAK-DOWN</b>
<b>Proposal Line Number</b>	Will be the Same as the Line Number
<b>Related Item</b>	<b>STANDARD ITEM</b>
<b>Critical</b>	This checkbox will not be used. Do not check this box.
<b>Play Plan Quantity</b>	If the new contract item is to be paid on a plan quantity basis, check this box.
<b>Material Adjustment Discrepancy</b>	Always check this box.
<b>Supplemental Description</b>	If using construction miscellaneous, include sufficient detail to describe work being performed. If applying a unit price adjustment indicate it here.

# CHANGE ORDERS

A.6 (3)

## ADDING NEW ITEMS

### STEP

3

Entering in Item Information concerning this change order



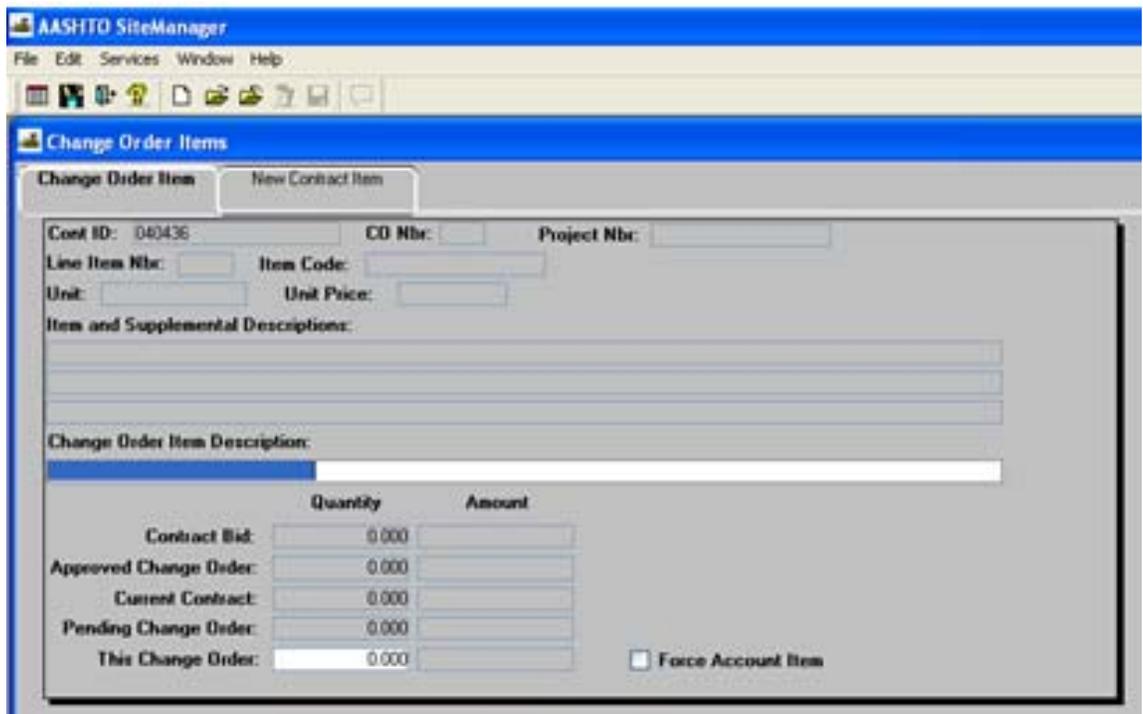
### USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



### SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance / Items / Change Order Item Tab



# CHANGE ORDERS



## ADDING NEW ITEMS

A.6 (3)



### ENTERED INFORMATION

FIELD	Change Order Item—Change Order Item Tab
<b>Change Order Description</b>	If using construction miscellaneous, include sufficient detail to describe work being performed. If applying a unit price adjustment indicate it here.
<b>This Change Order</b>	Will be the Quantity
<b>Force Account Item</b>	Will be Unchecked

# CHANGE ORDERS

A.6 (4)

ADDING NEW ITEMS

**STEP**

**4**

Entering in Item Explanations



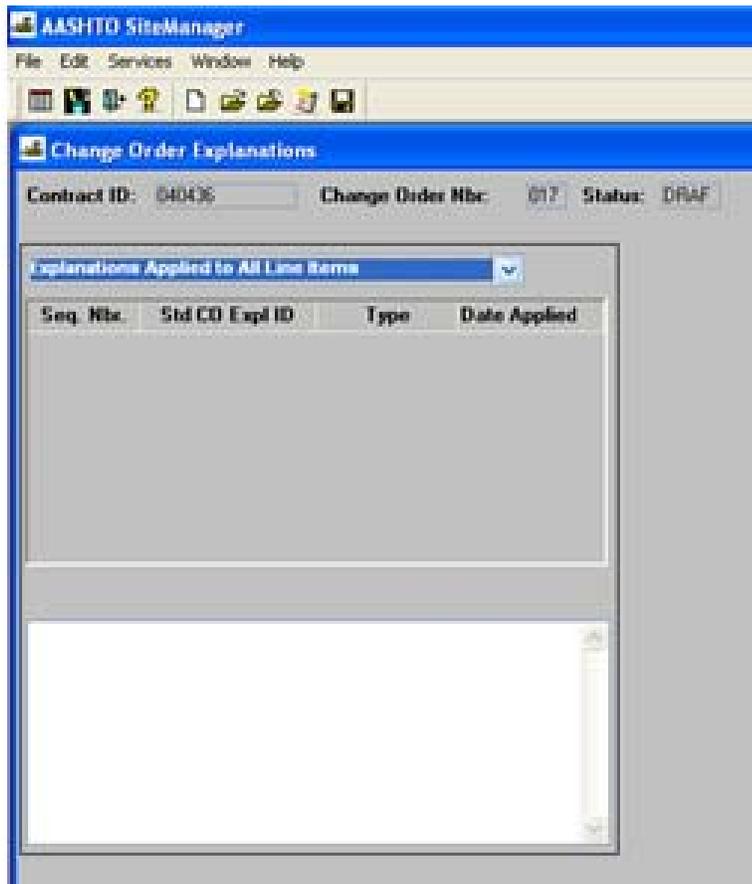
**USER**

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



**SCREENSHOT**

Go to Main Panel / Change Order/ Change Order Maintenance / Change Order Explanations



# CHANGE ORDERS



## ADDING NEW ITEMS

A.6 (4)

### ENTERED INFORMATION



FIELD	Change Order Item—Change Order Item Tab
<b>General Explanations</b>	<p>A general explanation shall be created to establish the overall intent of the change. The author of the change order may create their own general explanation or utilize the standard change order explanations available in the system. Refer to Section 803.3, Standard Explanations for a complete listing of the standard explanation available and for the instances where the use of a standard explanation is mandatory.</p>
<b>Specific Line Item Explanations</b>	<p>Specific line item explanations shall be created for each change order item. The author of the change order may create their own specific line item explanations or utilize the standard change order explanations available in the system.</p> <p>Refer to Section 803.3, Standard Explanations for a complete listing of the standard explanation available and for the instances where the use of a standard explanation is mandatory.</p>

# CHANGE ORDERS

A.6 (5)

## ADDING NEW ITEMS

### STEP

5

Recalculate Change Order



### USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



### SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance / Header

The screenshot shows the AASHTO SiteManager application window. The 'Services' menu is open, and 'Calculate Change Order' is highlighted. The menu items and their shortcuts are:

- Choose Keys (Ctrl+Alt+K)
- Generic Fields (Ctrl+Alt+G)
- Attachments
- Process Status
- Calculate Change Order (Ctrl+Shift+C)**
- Forward To... (Ctrl+Shift+F)
- CO Items (Ctrl+Shift+I)
- CO Time Adjustments (Ctrl+Shift+M)
- Change Order Tracking (Ctrl+Shift+T)
- Run Change Order Process

In the background, a dialog box is visible with the following fields:

- Tentative Verbal Approval Dates: Federal: 00/00/00, Local: 00/00/00
- On: 12/11/09
- Functions:
  - Override Approval Rules
  - Overrun/Underrun
  - Force Account
  - Extra Work
  - Zero Dollar
  - Time Adjustment
  - Final Quantity
- Emergency Work:
- Bid Contract Amt: \$24,831,744.31
- Current Contract Amt: \$24,817,310.01
- CO Amount: \$0.00
- Reference to: Dispute:  Force Account:

From the Top Menu Select Services then Calculate Change Order.

Your Change order is ready for the Review or Approval Process Which is covered in Section B of this Manual.

# CHANGE ORDERS



ADDING NEW ITEMS

A.6

NOTES



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CHANGE ORDERS / CHANGE ORDER MAINTENANCE

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**PROCESS**

Creating a Over run / Under run Change Order

**NOTE : No new Items or Time is allowed on a Final Quantity Change Order**

**STEPS**

- ◆ 1. ENTERING IN THE HEADER
- ◆ 2. ENTERING IN EXISTING ITEM FROM CONTRACT
- ◆ 3. ENTERING IN GENERAL AND ITEM EXPLANATION
- ◆ 4. RECALCULATING CHANGE ORDER

# CHANGE ORDERS



## NOTES

A.7 (1)

### STEP

1

Entering in Header Information.

### USER



GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		

### SCREENSHOT



Go to Main Panel / Change Order/ Change Order Maintenance / Header

The screenshot shows a software interface for Change Order (CO) header information. It includes fields for Contract ID (040436), CO Number (018), and Tentative Verbal Approval Dates (Federal: 00/00/00, Local: 00/00/00). The CO was created by Wilson, Antonella C. on 12/11/09. The status is Draft and the approval level is set. The description field is highlighted in blue. There are dropdown menus for Reason Code and CO Type. Checkboxes are present for Override Approval Rules, Emergency Work, and various Functions (Overrun/Underrun, Force Account, Extra Work, Zero Dollar, Time Adjustment, Final Quantity). Contract amounts are displayed: Bid Contract Amt: \$24,831,744.31, Current Contract Amt: \$24,817,310.01, and CD Amount: \$0.00. Reference to Dispute and Force Account fields are also visible.

# CHANGE ORDERS

A.7 (1)

FINAL QUANTITY CHANGE ORDER

## ENTERED INFORMATION

FIELD	
FEDERAL	For those contracts which require Federal Oversight, enter the date that the change was granted verbal approval by the FHWA.
LOCAL	For those contracts which are Local Government projects, enter the date that the Local Government entity was notified of the pending change order.
DESCRIPTION	<b>FQCO</b>
REASON CODE	<b>SITE REQUIREMENT</b>
CO TYPE	<b>CHANGE ORDER</b>
OVERRIDE	ODOT will not use this indicator. This checkbox will never be selected
APPROVAL RULES	
EMERGENCY WORK	ODOT will not use this indicator. This checkbox will never be selected
Overrun/ Underrun	Leave Unchecked
Extra Work	Leave Unchecked
Time Adjustment	Leave Unchecked
Force Account	WILL NOT BE USED
Zero Dollar	Leave Unchecked
Final Quantity	<b>CHECK</b>
Dispute	Please fill in with the appropriate Dispute Tracking number. If no Dispute has been created please leave blank.
Force Account	ODOT will not use this indicator. This checkbox will never be selected

# CHANGE ORDERS

||

FINAL QUANTITY CHANGE ORDER

A.7 (1)

ATTACHMENTS



AUTHORIZED BY CONSTRUCTION DIVISION ON 1 AUGUST 2010

CHANGE ORDERS / CHANGE ORDER MAINTENANCE

PAGE 76

# CHANGE ORDERS

A.7 (2)

## FINAL QUANTITY CHANGE ORDER

### STEP

2

If necessary, enter in existing Item Information for this change order Otherwise skip to Step 3



### USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



### SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance / Items / Change order Item Tab

Add Item from a list of existing pay items

The screenshot shows the AASHTO SiteManager application window. The 'Services' menu is open, and 'CO Items' is highlighted. Below the menu, a 'Change Order Item Description' form is visible, containing a table with columns for 'Quantity' and 'Amount'. The table lists various contract and change order types with their respective values.

	Quantity	Amount
Contract Bid:	0.000	
Approved Change Order:	0.000	
Current Contract:	0.000	
Pending Change Order:	0.000	
This Change Order:	0.000	

There is also a checkbox labeled 'Force Account Item' at the bottom right of the form.

# CHANGE ORDERS



## FINAL QUANTITY CHANGE ORDER

A.7 (2)

### ENTERED INFORMATION



FIELD	Change Order Item—Change Order Item Tab
Change Order Description	None
This Change Order	Will be the Quantity
Force Account Item	Will be Unchecked

# CHANGE ORDERS

A.7 (3)

FINAL QUANTITY CHANGE ORDER

## STEP

3

Entering in General and Item Explanations



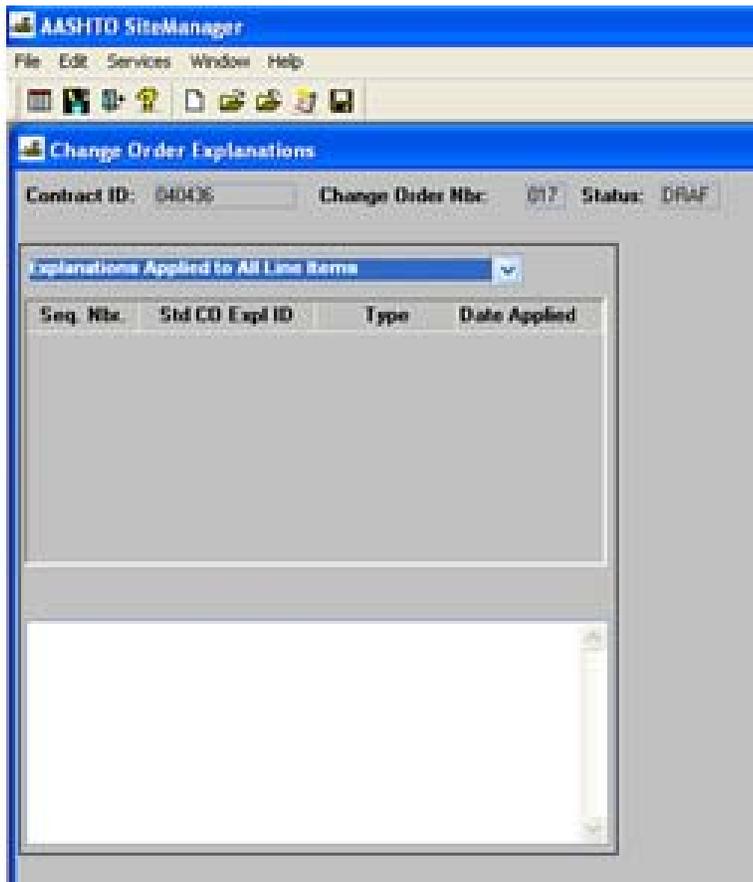
## USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



## SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance / Change Order Explanations



# CHANGE ORDERS



## FINAL QUANTITY CHANGE ORDER

A.7 (3)

### ENTERED INFORMATION



FIELD	Change Order Item—Change Order Item Tab
<b>General Explanations</b>	<p>A general explanation shall be created to establish the overall intent of the change. The author of the change order may create their own general explanation or utilize the standard change order explanations available in the system. Refer to Section 803.3, Standard Explanations for a complete listing of the standard explanation available and for the instances where the use of a standard explanation is mandatory.</p>
<b>Specific Line Item Explanations</b>	<p>Specific line item explanations shall be created for each change order item. The author of the change order may create their own specific line item explanations or utilize the standard change order explanations available in the system.</p> <p><b>PROVIDE SUFFICIENT INFORMATION TO EXPLAIN OVERRUN OR UNDERRUN</b></p> <p>Refer to Section 803.3, Standard Explanations for a complete listing of the standard explanation available and for the instances where the use of a standard explanation is mandatory.</p>

# CHANGE ORDERS

A.7 (4)

## FINAL QUANTITY CHANGE ORDER

### STEP

4

Recalculate Change Order



### USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



### SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance /

Header

The screenshot displays the AASHTO SiteManager application window. The 'Services' menu is open, showing options such as 'Choose Keys', 'Generic Fields', 'Attachments', 'Process Status', 'Calculate Change Order' (highlighted), 'Forward To...', 'CO Items', 'CO Time Adjustments', 'Change Order Tracking', and 'Run Change Order Process'. The background shows a form with the following fields:

- Tentative Verbal Approval Dates: Federal: 00/00/00, Local: 00/00/00
- On: 12/11/09
- Functions:
  - Override Approval Rules
  - Overrun/Underrun
  - Force Account
  - Extra Work
  - Zero Dollar
  - Time Adjustment
  - Final Quantity
- Emergency Work:
- Bid Contract Amt: \$24,831,744.31
- Current Contract Amt: \$24,817,310.01
- CD Amount: \$0.00
- Reference In: Dispute:  Force Account:

From the Top Menu Select Services then Calculate Change Order

Your Change order is ready for the Review or Approval Process Which is covered in Section B of this Manual.

# CHANGE ORDERS

||

FINAL QUANTITY CHANGE ORDER

A.7

NOTES



AUTHORIZED BY CONSTRUCTION DIVISION ON 1 AUGUST 2010

CHANGE ORDERS / CHANGE ORDER MAINTENANCE

PAGE 82

**PROCESS**

Creating Time adjustment Change Order

**STEPS**

- ◆ 1. ENTERING IN THE HEADER
- ◆ 2. ENTERING IN TIME ADJUSTMENT
- ◆ 3. ENTERING IN GENERAL EXPLANATION

# CHANGE ORDERS



## TIME ADJUSTMENTS

A.8 (1)

### STEP

1

Entering in Header Information.

### USER



GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		

### SCREENSHOT



Go to Main Panel / Change Order/ Change Order Maintenance / Header

The screenshot shows a software interface for entering change order header information. The form includes the following fields and options:

- Contract ID: 040436
- CO Number: 018
- Tentative Verbal Approval Dates: Federal: 00/00/00, Local: 00/00/00
- CD Created by: Wilson, Antonella C.
- On: 12/11/09
- Status: Draft
- Approval Level: [dropdown]
- Description: [text field]
- Reason Code: [dropdown]
- CD Type: [dropdown]
- Override Approval Rules
- Emergency Work
- Functions:  Overtime/Underman,  Force Account,  Extra Work,  Zero Dollar,  Time Adjustment,  Final Quantity
- Bid Contract Amt: \$24,831,744.31
- Current Contract Amt: \$24,817,310.01
- CD Amount: \$0.00
- Reference to: Dispute: [checkbox], Force Account: [checkbox]

# CHANGE ORDERS

A.8 (1)

TIME ADJUSTMENTS

## ENTERED INFORMATION

FIELD	
FEDERAL	For those contracts which require Federal Oversight, enter the date that the change was granted verbal approval by the FHWA.
LOCAL	For those contracts which are Local Government projects, enter the date that the Local Government entity was notified of the pending change order.
DESCRIPTION	<b>ADDING TIME FOR ____</b>
REASON CODE	<b>SITE REQUIREMENT</b>
CO TYPE	<b>CHANGE ORDER OR SUPPLEMENTAL AGREEMENT</b>
OVERRIDE	ODOT will not use this indicator. This checkbox will never be selected
APPROVAL RULES	
EMERGENCY WORK	ODOT will not use this indicator. This checkbox will never be selected
Overrun/ Underrun	Leave Unchecked
Extra Work	Leave Unchecked
Time Adjustment	<b>CHECK</b>
Force Account	WILL NOT BE USED
Zero Dollar	Leave Unchecked
Final Quantity	Leave Unchecked
Dispute	Please fill in with the appropriate Dispute Tracking number. If no Dispute has been created please leave blank.
Force Account	ODOT will not use this indicator. This checkbox will never be selected

# CHANGE ORDERS



TIME ADJUSTMENTS

A.8 (1)

ATTACHMENTS



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CHANGE ORDERS / CHANGE ORDER MAINTENANCE

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# CHANGE ORDERS

A.8 (2)

TIME ADJUSTMENTS

## STEP

2

Entering in Time Adjustment



## USER

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



## SCREENSHOT

Go to Main Panel / Change Order/ Change Order Maintenance / Change order Time adjustments

Contract ID: 040436    Change Order Nbr: 017

Adjusted Contract or Milestone	Adjustment Days	Adjustment Date	Explanation
Contract		00/00/00	

For Milestone:     or Contract Completion  
 Time Adjustment Days: 0    Adjusted Completion Date: 00/00/00  
 Explanation:

# CHANGE ORDERS



## TIME ADJUSTMENTS

A.8 (2)



### ENTERED INFORMATION

FIELD	
For Milestone	Select if modifying milestone ( " Time, etc.)
Contract Completion	Select if modifying Contract Time
Time Adjusted Days	If calendar day contract, add the number of days to be adjusted.
Adjusted Completion Date	If a fixed Completion date contract, enter in the new "Completion Date"
Explanation	<b>DETAIL REASON FOR TIME ADJUSTMENT</b>

**STEP**

**3**

Entering in General Explanations



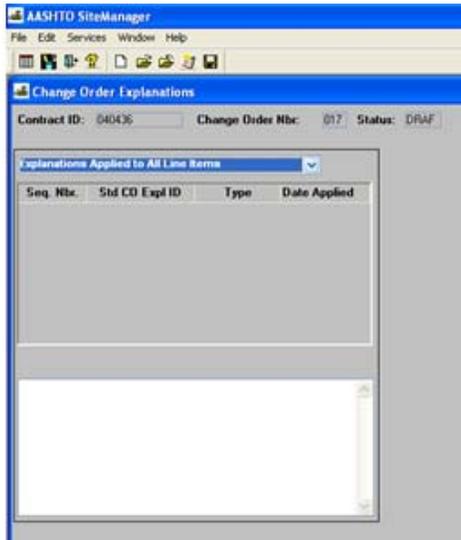
**USER**

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	CONPRMAN	Consultant Project Manager (R)
RESPRMAN	Residency Project Manager (R)		



**SCREENSHOT**

Go to Main Panel / Change Order/ Change Order Maintenance /  
Change Order Explanations



A general explanation shall be created to establish the overall intent of the change. The author of the change order may create their own general explanation or utilize the standard change order explanations available in the system. Refer to Section 803.3, Standard Explanations for a complete listing of the standard explanation available and for the instances where the use of a standard explanation is mandatory.

Your Change order is ready for the Review or Approval Process Which is covered in Section B of this Manual.

# CHANGE ORDERS



TIME ADJUSTMENTS

A.8

NOTES



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CHANGE ORDERS / CHANGE ORDER MAINTENANCE

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# CHANGE ORDERS

## REVIEW PROCESS

### OVERVIEW

This series of procedure details the review process of a Change order. Review process is optional. Some Division may choose to do this process externally or include more individuals in the review process.



### USER(S) FOR THIS PROCEDURE

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	COUNTPRT	Contractor Counterpart (R)
DIVADMIN	Division Administration (R)	FHWA	Federal Highway Administration (R)
CONADMIN	Construction Administration (R)		
CENADMIN	Central Office Administration (R)		



### REFERENCES

Reference	Number
SiteManager Policy	0801.7, 0804.0
Control Directive	20090729, 20020212, 20000225, 19971107, 19961121, 19920904

# CHANGE ORDERS



## REVIEW PROCESS

B

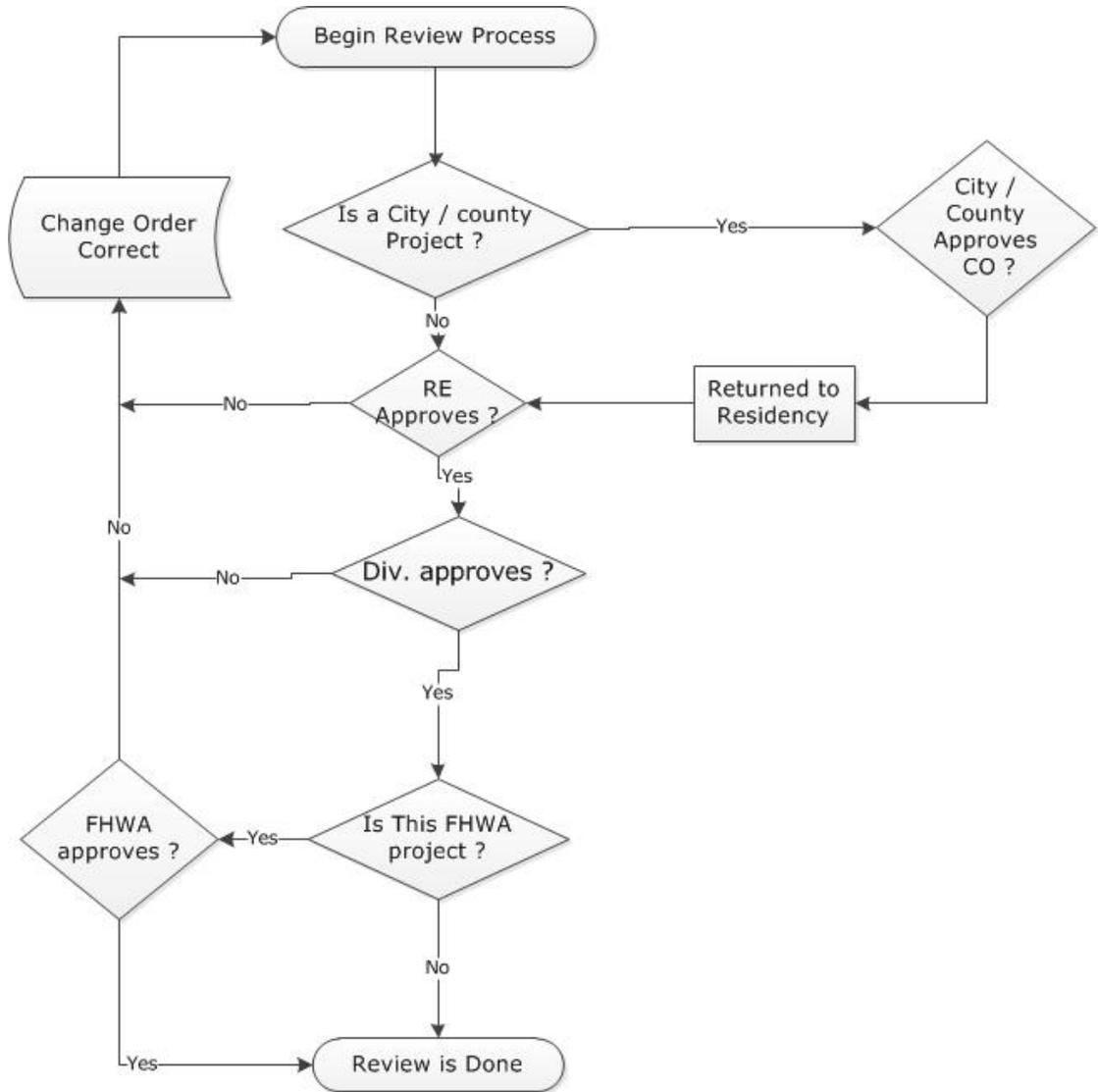
### REPORTS



Report	Location
Change order to Contractor	

### NOTES





# CHANGE ORDERS



REVIEW PROCESS

B.1

NOTES



AUTHORIZED BY CONSTRUCTION DIVISION ON 1 AUGUST 2010

CHANGE ORDERS

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# CHANGE ORDERS

## APPROVAL PROCESS

### OVERVIEW

This series of procedure details the approval process of a Change order. A unilateral Change order can be applied to any one of this circumstance. The Only difference is that the Contractor will not be signing the Document.



### USER(S) FOR THIS PROCEDURE

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	COUNTPRT	Contractor Counterpart (R)
DIVADMIN	Division Administration (R)	FHWA	Federal Highway Administration (R)
CONADMIN	Construction Administration (R)		
CENADMIN	Central Office Administration (R)		



### REFERENCES

Reference	Number
SiteManager Policy	0801.7, 0801.8, 0804.0
Control Directive	20090729, 20020212, 20000225, 19971107, 19961121, 19920904

# CHANGE ORDERS



## APPROVAL PROCESS

C

### REPORTS



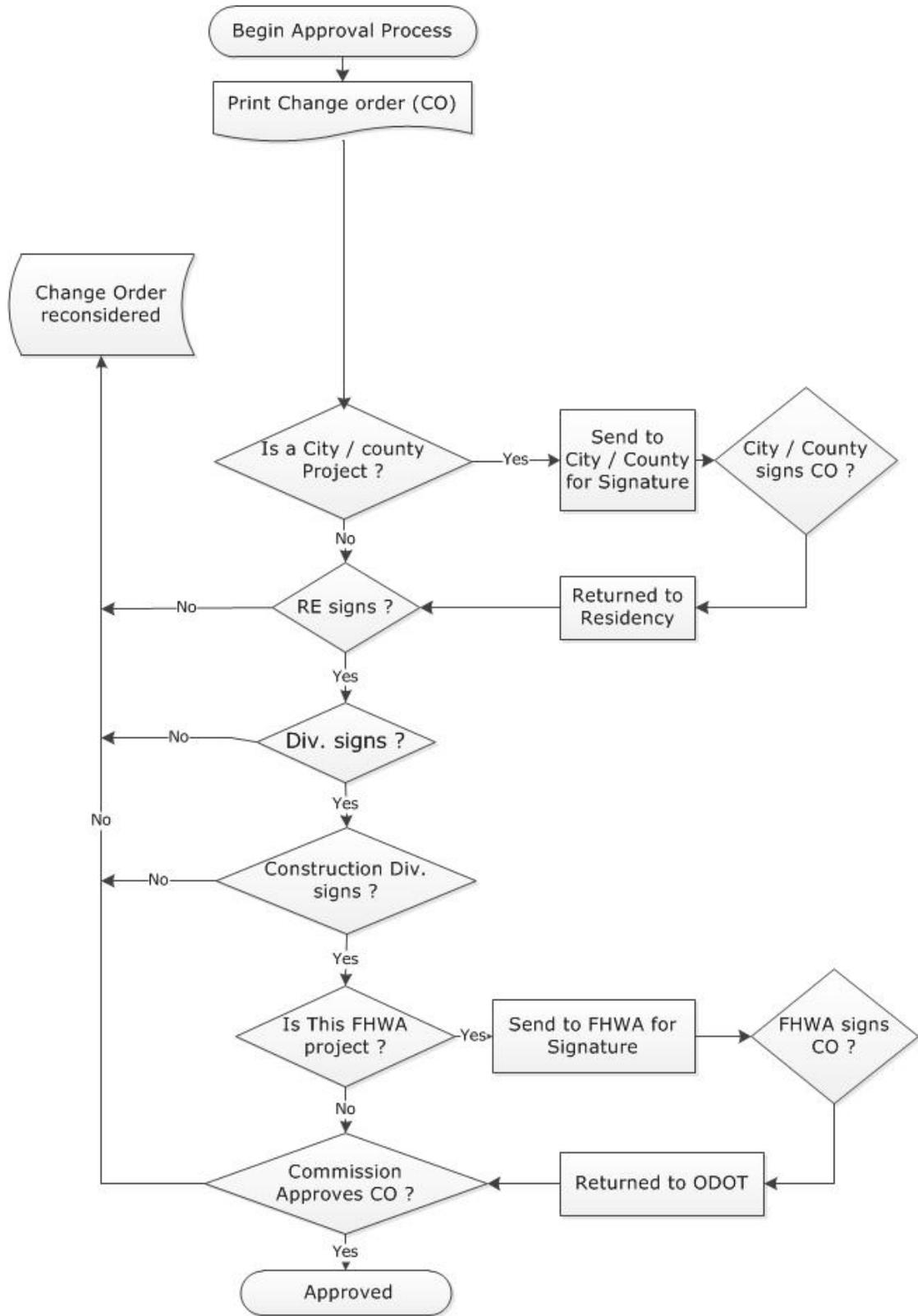
Report	Location
Change order to Contractor	

### NOTES



# CHANGE ORDERS

## PROCESS DIAGRAM



# CHANGE ORDERS

II

## APPROVAL PROCESS

C.1

### PROCESS

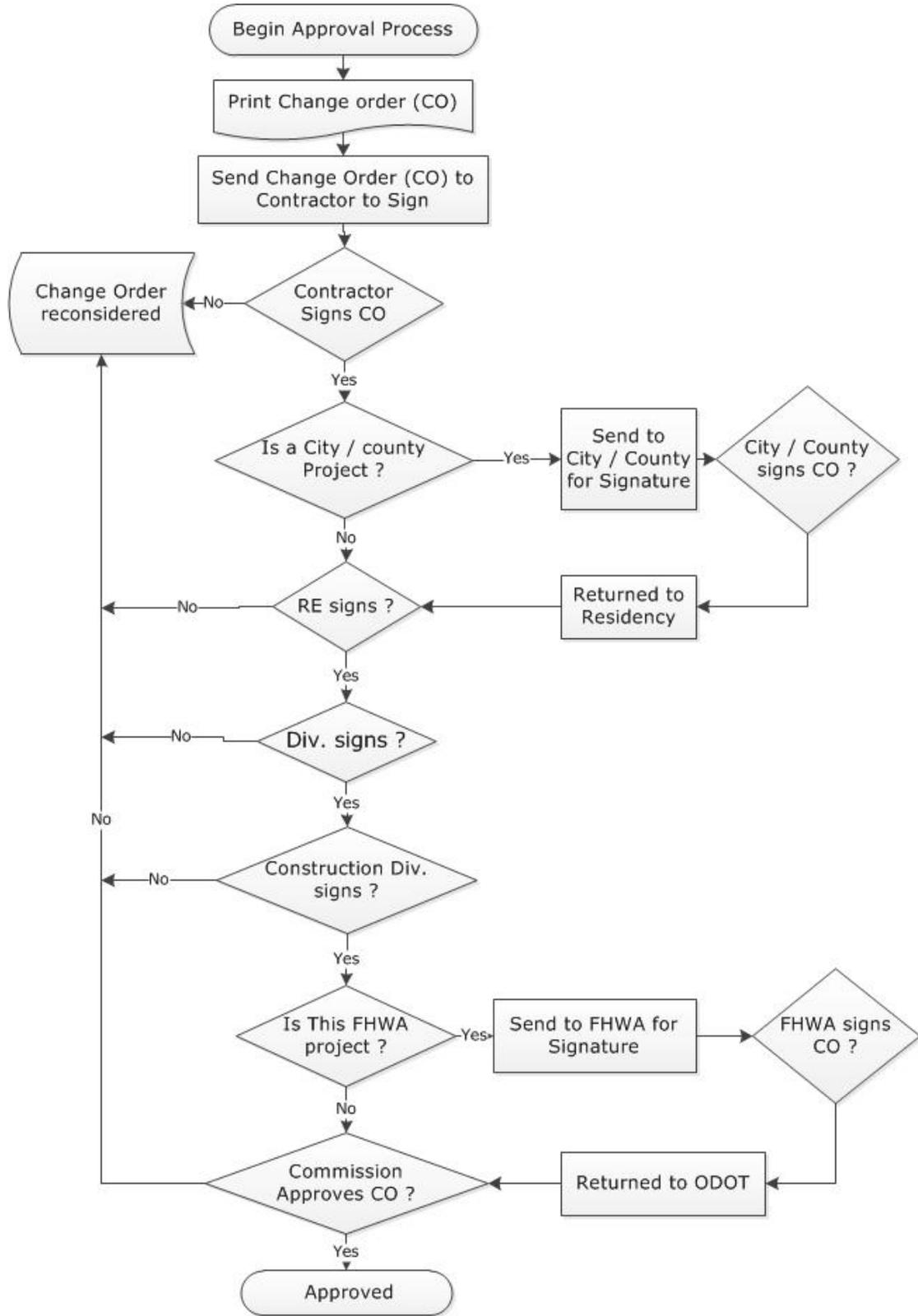
Unilateral Change Order

### STEPS

Same as Change order or Supplemental (II.C.2) except the Contractor will not be signing a Document

# CHANGE ORDERS

## PROCESS DIAGRAM



# CHANGE ORDERS

II

## APPROVAL PROCESS

C.2

### PROCESS

Change Order or Supplemental Agreement

### STEPS

See Following Approval Types

# CHANGE ORDERS

C.2A

## APPROVAL PROCESS

### DEFAULT DATA

Federal Oversight Projects

### Prior Authorization

If over \$50,000 or a Change In Scope The FHWA has to issue a 1365 Form

Level	Group ID	Group Names	Personnel
	FHWA	Federal Highway Administration	

### Change Order Approval Groups

Approval Level	Group ID	Group Names	Personnel
1	COUNTPRT	Contractor Counterpart	
2	RESADMIN	Residency Administration	
3	DIVADMIN	Field Division Administration	
4	CONADMIN	Construction Administration	
5	FHWA	Federal Highway Administration	
6	CENADMIN	Central Office Administration	

# CHANGE ORDERS

II

## APPROVAL PROCESS

C.2B

### DEFAULT DATA

Municipal / County Funded Projects

Prior Authorization

Level	Group ID	Group Names	Personnel

Change Order Approval Groups

Approval Level	Group ID	Group Names	Personnel
1	COUNTPRT	Contractor Counterpart	
2	RESADMIN	Residency Administration	
3	DIVADMIN	Field Division Administration	
4	CONADMIN	Construction Administration	
5	CENADMIN	Central Office Administration	

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CHANGE ORDERS / CHANGE ORDER MAINTENANCE

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# CHANGE ORDERS

C.2c

## APPROVAL PROCESS

### DEFAULT DATA

Stimulus Projects

Prior Authorization

Level	Group ID	Group Names	Personnel
		Stimulus Coordinator	
	FHWA	Federal Highway Administration	

Change Order Approval Groups

Approval Level	Group ID	Group Names	Personnel
1	COUNTPRT	Contractor Counterpart	
2	RESADMIN	Residency Administration	
3	DIVADMIN	Field Division Administration	
4	CONADMIN	Construction Administration	
5	FHWA	Federal Highway Administration	
6	CENADMIN	Central Office Administration	

# CHANGE ORDERS

II

## APPROVAL PROCESS

C.2D

### DEFAULT DATA

State Funded Projects

Prior Authorization

Level	Group ID	Group Names	Personnel

Change Order Approval Groups

Approval Level	Group ID	Group Names	Personnel
1	COUNTPRT	Contractor Counterpart	
2	RESADMIN	Residency Administration	
3	DIVADMIN	Field Division Administration	
4	CONADMIN	Construction Administration	
5	CENADMIN	Central Office Administration	

AUTHORIZED BY CONSTRUCTION DIVISION ON 1 AUGUST 2010

CHANGE ORDERS / CHANGE ORDER MAINTENANCE

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# CHANGE ORDERS

## OVERVIEW

Usually on the first Monday of the month, the Commission meeting is held. Construction Division reviews all changes orders and creates a report to present to the Commission for approval.



## USER(S) FOR THIS PROCEDURE

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
CENADMIN	Central Office Administration		



## REFERENCES

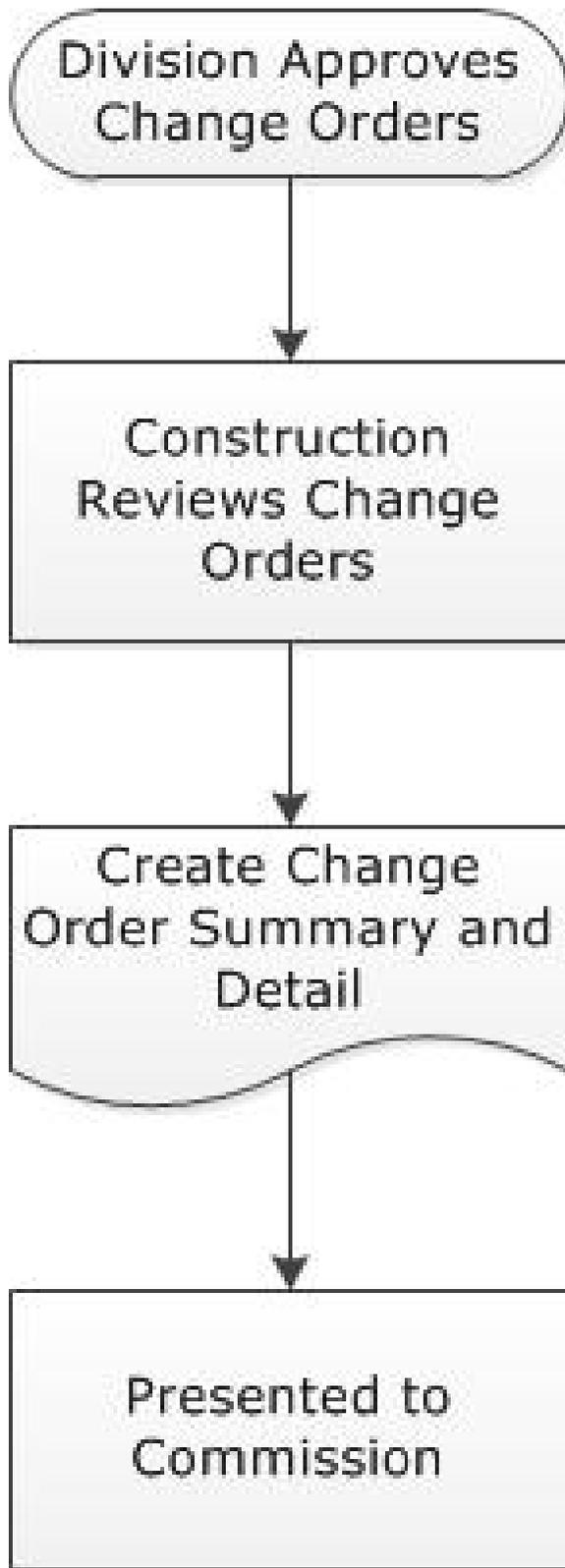
Reference	Number
SiteManager Policy	0800.0, 0801.1, 0801.2, 0801.3, 0801.4, 0801.5, 0801.6, 0801.7, 0801.8, 0804.0
Control Directive	20090729, 20020212, 20000225, 19971107, 19961121, 19920904

# CHANGE ORDERS

II

## PROCESS DIAGRAM

D



AUTHORIZED BY CONSTRUCTION DIVISION ON 1 AUGUST 2010

CHANGE ORDERS

# CHANGE ORDERS

**PROCESS**

Prepare Change Order for Approval

**STEPS**

- ◆ 1. REVIEW CHANGE ORDER
- ◆ 2. CREATE DETAIL FOR CHANGE ORDER
- ◆ 3. ADD TO SUMMARY OF CHANGE ORDERS
- ◆ 4. PRESENTED BEFORE COMMISSION

# CHANGE ORDERS

||

COMISSION MEETING

D

AUTHORIZED BY CONSTRUCTION DIVISION ON 1 AUGUST 2010

CHANGE ORDERS

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# CHANGE ORDERS

E

## ATTACHMENTS

### OVERVIEW

Attached are a Copy of the Available attachments



### USER(S) FOR THIS PROCEDURE

GROUP ID	GROUP NAME	GROUP ID	GROUP NAME
RESADMIN	Residency Administration (R)	DIVADMIN	Division Administration
RESPRMAN	Residency Project Manager (R)	CONADMIN	Construction Administration
CONPRMAN	Consultant Project Manager (R)	CENADMIN	Central Office Administration



### REFERENCES

Reference	Number
SiteManager Policy	0800.0, 0801.1, 0801.2, 0801.3, 0801.4, 0801.5, 0801.6, 0801.7, 0801.8, 0804.0
Control Directive	20090729, 20020212, 20000225, 19971107, 19961121, 19920904

# CHANGE ORDERS

||

NOTES

AUTHORIZED BY CONSTRUCTION DIVISION ON 1 AUGUST 2010

**CHANGE ORDERS**



Contract ID \_\_\_\_\_

## Oklahoma Department of Transportation

Cost Breakdown For Differing Site Conditions, Changes & Extra Work

Project No. \_\_\_\_\_ Date \_\_\_\_\_

County \_\_\_\_\_ Contractor \_\_\_\_\_

Description of Work \_\_\_\_\_

1. <b>Labor Total</b> (Refer to Attachment A)		
a) Labor Overhead & Profit	%	
2. <b>Material Total</b> (Refer to Attachment B)		
a) Material Overhead & Profit	%	
3. <b>Equipment Total</b> (Refer to Attachment C)		
a) Equipment Additional Administrative Costs & Profit	%	
4. a) <b>Bonds</b>	%	
b) <b>Property Damage &amp; Liability Insurance</b>	%	
c) <b>Workers Compensation</b> Rate/\$100 of Payroll		
d) <b>Unemployment Insurance Contribution</b>	%	
e) <b>Social Security Taxes</b>	%	
f) <b>Employee Fringe Benefits</b>	%	
5. <b>Subcontracted Work Total</b>		
a) Prime Contractor Overhead on Subcontracted Work	%	
6. <b>Work of a Non-Highway Construction Nature</b>		
a) Prime Contractor Overhead on Subcontracted Work	%	
7. <b>Total Cost of Work</b>		
a) Unit Price                      Quantity                      Units		









# RECORD OF AUTHORIZATION TO PROCEED WITH MAJOR CONTRACT REVISION

U.S. Department of  
Transportation  
Federal Highway  
Administration

PROJECT NO.	COUNTY	STATE Oklahoma
TYPE REVISION		
CHANGE ORDER	SUPPLEMENTAL AGREEMENT	TIME EXTENSION
WORK ORDER	OTHER:	SPECIFICATION CHANGE
REQUESTED BY:		DATE:
NATURE AND REASON FOR PROPOSED REVISION <i>(if additional space is required, use reverse side)</i>		
ESTIMATED INC. DEC. IN COST: \$	METHOD OF PAYMENT:	
INC. DEC. IN TIME: days		
	FORCE ACCOUNT	NEGOTIATED PRICE LUMP SUM
	UNIT BID PRICES	OTHER:
THE WORK COVERED BY THE PROPOSED REVISION AS DESCRIBED ABOVE IS HEREBY AUTHORIZED SUBJECT TO THE CONDITIONS MARKED BELOW:		
EVALUATION OF COST DATA	AUTHORIZED WITHOUT FEDERAL PARTICIPATION	
LIMITATIONS EXTENT OF FEDERAL PARTICIPATION	OTHER:	
DETERMINATION OF SATISFACTORY ADJUSTMENT IN TIME		
ADEQUATE SUBMITTAL OF WRITTEN SUPPORTING DATA	NONE	
RECOMMENDED BY AREA ENGINEER	DIVISION OFFICE APPROVAL	
SIGNATURE	DATE	SIGNATURE DATE



## Oklahoma Department of Transportation

200 NE 21st Street  
Oklahoma City, OK 73105  
Phone: 405-522-8808  
Phone: 405-522-3748  
E-mail: [sitemanager@odot.org](mailto:sitemanager@odot.org)