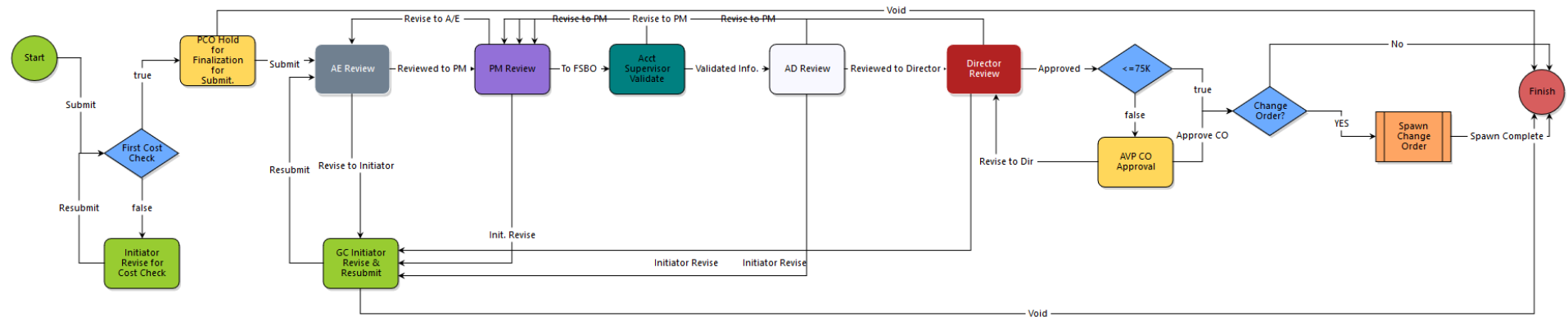




A Guide On Potential Change Order (PCO)

*Prepared by UCF / e-Builder
14 February 2022*



Process Description:

The purpose of the Potential Change Order (PCO) process is for receiving potential change orders (Addendum & Add Services). This process will be used in conjunction with the Change Order (CO) process for bundling multiple PCOs into a single CO. This process is initiated by the GC (Primary, Secondary, Tertiary).

Process Participants:

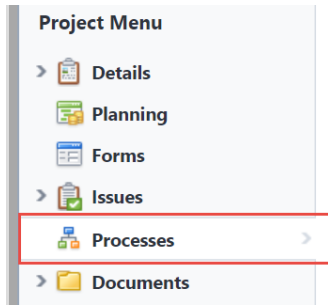
1. GC Primary
2. GC Secondary
3. GC Tertiary
4. Architect/Engineer (AE)
5. Project Manager (PM)
6. Accounting Supervisor
7. Assistant/Associate Director (AD)
8. Director
9. AVP

Process Details:

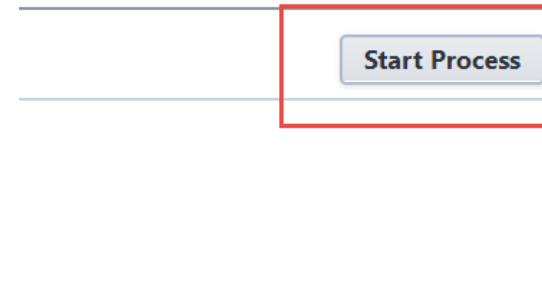
1. After the submission of the potential change order the process will route to the AE for review.
2. The AE reviews the process and can revise with comment back to the initiator. The AE can also take the "Reviewed" action and move the process forward.
3. The PM receives the process and can revise with comment to the AE or initiator. The PM can also forward to accounting for validation.
4. The Accounting Supervisor reviews the process and validates the information and can either send it back to the PM for revisions with comment or move it forward to the AD for review.
5. The AD can revise with comment back to the PM. The AD can take the reviewed action and move the process forward.
6. The Director can revise with comment back to the PM. The Director can approve the process forward.
7. For PCOs with a value greater than \$75,000, the AVP must review the process. The AVP can either approve the PCO or send it back to the Director for revisions with comment.
8. Spawn change order step moves the process to the initiator's court to execute the Change Approval process.

Initiation of Process:

1. Click process name to open **Potential Change Order (PCO)**.
2. Select **Processes** from the Project Menu.



3. Select **Start Process** in the process Module.



4. Click **Potential Change Order Process (PCO)** button.

06 - Potential Change Order (PCO)	This process is for receiving potential change orders (Addendum & Add Services). This process will be used in conjunction with the Change Order (CO) process for bundling multiple PCOs into a single CO.
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GC Input:

1. Click process name to open **Potential Change Order (PCO)**..

Processes		Reports (0)	
Process	Subject	Step	
<input type="checkbox"/> PCO - 6	Test	Start	

2. Scroll and complete the necessary details. Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed.

Required attachments:

1. Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers.
2. Updated Budget Reconciliation.
3. CCD, RFI, ASI, SK, plans and/or specifications, as applicable.
4. Updated project schedule, as applicable.

- * Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers:
 - Updated Budget Reconciliation:
 - CCD, RFI, ASI, SK, plans and/or specifications, as applicable:
 - Updated project schedule, as applicable:

<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/>	<input type="button" value="Browse Computer"/>
<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/>	<input type="button" value="Browse Computer"/>
<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/>	<input type="button" value="Browse Computer"/>
<input type="text" value="Drag and drop file here"/>	or	<input type="button" value="Browse e-Builder"/>	<input type="button" value="Browse Computer"/>

Justification

Project ID Number: left intentionally blank

Schedule Impact (Days):

Is this E&O (errors & omissions)?: Yes No

* Reason for Change Order: -- Please select an option --

Other Reason for Change Order: Fill in this box if "Other" is chosen above for Reason for Change Order.

serif 16px B I U abc

DESCRIPTION - provide a concise description of the change order request:

CONTRACT - Explain why this Change Order Request is not part of the original Contract:

JUSTIFICATION - Explain why this Change Order Request is necessary:

EFFECT ON PROJECT - Provide the effect(s) on operations, maintenance, cost, and schedule:

PAYMENT - Explain the source of the funds: -- Please select an option --

GC Input:

Instructions:

Changing existing commitment items


1. In the [Commitment Change Details] section, select commitment (contract) from the Commitment drop down menu
2. Select the Reason Code that applies to the change
3. Click the "Add All Existing Items" button
4. Adjust the value of an existing commitment item

Adding new scope

1. In the Commitment Change Details section, select commitment (contract) from the Commitment drop down menu
2. Select the Reason Code that applies to the change
3. Click the "Add All Existing Items" button to display all existing commitment items
4. In the [Add Additional Scope Commitment Item] section, click the "Please Select a Line Item" link and select the appropriate Budget Line Item code
5. Optional: update the Commitment Item and Description. (the default to cost code/description will display)
6. Set the retainage percent
7. Enter the Change Amount
8. Click the ADD button
9. Repeat steps 4 through 8 for each additional scope item.

When complete, review the information for accuracy, then click the SUBMIT button to route for review.

Commitment Change Details

* Commitment:	<input type="text"/>	Company:	<input type="text"/>
Status:	Draft	* Reason Code:	Select One..
* Date Of Change:	02.14.2022 		

Commitment Change Custom Fields

There are no commitment change custom fields.

Commitment Change Items

There are no Commitment Change Items





Construction Contract Change Order

A/E Job No.:	<input type="text"/>
Federal Project No.:	<input type="text"/>
Proposal Date:	<input type="text"/>

Change Order backup should clearly delineate First Costs from Non-first Costs. If the entire Change Order is a first cost, the backup should clearly state this with a justification for this conclusion. First Cost and Non-first Cost fields must add up to the total cost submitted.

- First Cost – cost of change order scope if it was included in the original project (materials and labor at the same rates as the original project)
- Non-first Cost – costs above First Cost, such as re-work, expedited delivery, additional labor, etc. when related to an error or omission by the Architect. If the change order is not related to an error or omission by the Architect, then all costs are Firsts cost.

When submitted, the First Cost and Non-first Cost fields must add up to the total in New (Add) (Deduct) or else the process will be returned to the initiator to correct. If the process immediately returns to your court after submitting, this means you must revise the numbers to total properly. You will not see a specific error denoting this.

* Notice to Proceed Date:	<input type="text"/> 	Original Contract Sum:	<input type="text"/>
* Present Contract (Days):	<input type="text"/>	* Present Contract Completion Date:	<input type="text"/> 
* This Change (Days):	<input type="text"/>	* This Change Completion Date:	<input type="text"/> 
* New Contract Time (Days):	<input type="text"/>	* New Contract Time Completion Date:	<input type="text"/> 
Present Contract Sum:	<input type="text"/>	* First Cost:	<input type="text"/>
New (Add) (Deduct):	<input type="text"/>	* Non-first Cost:	<input type="text"/>
New Contract Sum:	<input type="text"/>		

* CONTRACTOR CERTIFICATION: Contractor hereby certifies that the cost and schedule impacts to this project have been completely appraised, that the justifications herewith are accurate and complete (including all direct costs, indirect costs, and consequential items), and that all changes have been coordinated with the contract documents (plans, specs, scope of work). Contractor also certifies that submission of this Change Order warrants that the project is free and clear of any and all claims or disputes in favor of the Contractor, subcontractors, material suppliers, or other persons or entities concerning this Change order and does hereby release the Owner from such claims and disputes. On bonded work, Contractor also certifies that the Surety consents to this Change Order and agrees that its bond(s) shall apply and extend to the Contract as modified or amended herewith.
 Yes

3. Select an action and click **Submit** button to move process along; possible actions are:

- Submit** – Select this action if all information is entered and process is ready to move forward.

Start Process

AE Review:

1. Click process name to open **Potential Change Order (PCO)**.

Processes		Reports (0)	
<input type="checkbox"/>	Process	Subject	Step
<input type="checkbox"/>	PCO - 6	Test	Start

2. Scroll to review and complete the necessary details. Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed.

Attachments, as required:

1. Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers.
2. Updated Budget Reconciliation.
3. CCD, RFI, ASI, SK, plans and/or specifications, as applicable.
4. Updated project schedule, as applicable.

Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers.:	<input type="text"/>
Updated Budget Reconciliation:	<input type="text"/>
CCD, RFI, ASI, SK, plans and/or specifications, as applicable.?	<input type="text"/>
Updated project schedule, as applicable.:	<input type="text"/>

3. Select an action and click **Take Action** button to move process along; possible actions are:
 - a. **Reviewed to PM**– Select this action if all information is correct and process is ready to move forward.
 - b. **Revise to Initiator/AE** – Select this action if after reviewing the information entered, the process needs to get sent back to the Initiator to make updates. Comments will be required upon taking this action
 - c. **Forward to Accounting**-Select this action if after reviewing the information entered.

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Initiator Revise:

1. Click process name to open **Potential Change Order (PCO)**.

Processes		Reports (0)	
Process	Subject	Step	
PCO - 6	Test	Start	

2. Review comments by selecting the **Comments** tab.

[Details](#)
[Comments \(1\)](#)
[Attached Documents \(0\)](#)
[Attached Processes \(0\)](#)
[Attached Forms \(0\)](#)
[Attached To \(0\)](#)

Request Comment Comment

Private Comment

Make Private These are the comments

Request Comment Comment

Required attachments:

1. Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers.
2. Updated Budget Reconciliation.
3. CCD, RFI, ASI, SK, plans and/or specifications, as applicable.
4. Updated project schedule, as applicable.

* Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers:

Updated Budget Reconciliation:

CCD, RFI, ASI, SK, plans and/or specifications, as applicable:

Updated project schedule, as applicable:

or

or

or

or

3. Scroll and complete the necessary details. Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed.

Justification

Project ID Number: left intentionally blank

Schedule Impact (Days):

Is this EBO (errors & omissions)? Yes No

* Reason for Change Order:

Other Reason for Change Order:

Fill in this box if "Other" is chosen above for Reason for Change Order.

DESCRIPTION - provide a concise description of the change order request:

CONTRACT - Explain why this Change Order Request is not part of the original Contract:

JUSTIFICATION - Explain why this Change Order Request is necessary:

EFFECT ON PROJECT - Provide the effect(s) on operations, maintenance, cost, and schedule:

PAYMENT - Explain the source of the funds:

06 - Potential Change Order (PCO) - 6

4. Select an action and click **Take Action** button to move process along; possible actions to take are:

- Resubmit** – Take this action once all comments have been addressed and all information in the process has been updated accordingly.
- Void** – Process is no longer needed and routes to finish in a Void status.

PM Review:

1. Click process name to open **Potential Change Order (PCO)**.

Processes		Reports (0)	
Process	Subject	Step	
PCO - 6	Test	Start	

2. Review the following information:

Attachments, as required:

1. Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers.
2. Updated Budget Reconciliation.
3. CCD, RFI, ASI, SK, plans and/or specifications, as applicable.
4. Updated project schedule, as applicable.

Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers:

Updated Budget Reconciliation:

CCD, RFI, ASI, SK, plans and/or specifications, as applicable:

Updated project schedule, as applicable:

3. Select an action and click **Take Action** button to move process along; possible actions are:
 - a. **Reviewed to AD** – Select this action if all information is entered and process is ready to move forward.
 - b. **Forward to Accounting**-Select this action if all information is entered but additional info is needed before the process can move forward.
 - c. **Revise to A/E or Initiator**-Select this action if after reviewing the information entered, the process needs to get sent back to the Initiator to make updates. Comments will be required upon taking this action

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Accounting Supervisor Validate:



1. Click process name to open **Potential Change Order (PCO)**.

Processes		Reports (0)	
Process	Subject	Step	
<input type="checkbox"/> PCO - 6	Test	Start	

2. Review the following information:

Accounting, please validate that there is sufficient funds for this Change Order Request (*Potential Change Order*).

Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers:	<input type="text"/>
Updated Budget Reconciliation:	<input type="text"/>
CCD, RFI, ASI, SK, plans and/or specifications, as applicable: 	<input type="text"/>
Updated project schedule, as applicable:	<input type="text"/>

Notice to Proceed Date:	Original Contract Sum:
Present Contract (Days):	Present Contract Completion Date:
This Change (Days):	This Change Completion Date:
New Contract Time (Days):	New Contract Time Completion Date:
Present Contract Sum:	First Cost: 
New (Add) (Deduct):	Non-first Cost: 
New Contract Sum:	

3. Select an action and click **Take Action** button to move process along; possible actions are:
 - a. **Reviewed to AD** – Select this action if all information is entered and process is ready to move forward.
 - b. **Forward to Accounting**-Select this action if all information is entered but additional info is needed before the process can move forward.
 - c. **Revis to A/E or Initiator**-Select this action if after reviewing the information entered, the process needs to get sent back to the Initiator to make updates. Comments will be required upon taking this action

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AD Review:

1. Click process name to open **Potential Change Order (PCO)**.

Processes		Reports (0)	
Process	Subject	Step	
<input type="checkbox"/> PCO - 6	Test	Start	


2. Review the information, Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed.

Attachments, as required:

1. Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers.
2. Updated Budget Reconciliation.
3. CCD, RFI, ASI, SK, plans and/or specifications, as applicable.
4. Updated project schedule, as applicable.

Material and labor cost proposal breakdown from contractor, sub-contractor, and suppliers:

Updated Budget Reconciliation:

CCD, RFI, ASI, SK, plans and/or specifications, as applicable: 

Updated project schedule, as applicable:

3. Select an action and click **Take Action** button to move process along; possible actions are:

- Reviewed to Director** – Select this action if all information is entered and process is ready to move forward.
- Revise to PM or Initiator**-Select this action if after reviewing the information entered, the process needs to get sent back to the Initiator to make updates. Comments will be required upon taking this action

06 - Potential Change Order (PCO) - 6

Delete Instance

Workflow Override

All Fields View

Instructions

-- Please select an action --

Take Action

Check Spelling

Print

Copy

Delegate

Save

Cancel

Director Review:

1. Click process name to open **Potential Change Order (PCO)**.

Processes		Reports (0)	
Process	Subject	Step	
<input type="checkbox"/> PCO - 6	Test	Start	

2. Review the information, Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed.

Redline Instructions:

1. If using the Redline tool on the attachments, click the Redline link beneath the file name.
2. Once the new window appears with the file content on the screen, click the Annotate button to start marking up the file.
3. When complete, click the Annotate drop down menu and select Save
4. Give the annotation layer a name and click OK.
5. Close the window.

Reviewing Redline Markups (marked up documents will be denoted with a number next to the word "Redline" - For example, Redline (1) to denote there is only 1 layer of markups.

1. Click on "Redline 01"
2. Click on the Annotate drop down menu and select OPEN
3. Click on the checkbox next to the markup file you wish to view from the list

If you wish to mark up the existing file, you can do so.

- If you wish to save the markup onto the existing file, click SAVE.
- If you wish to save the markup onto another layer, click SAVE AS, name the new layer, then click OK.

Subconsultant Billing:

Reimbursables:

Contractor - Is This a Final Completion?:

PM - Is This a Final Completion?:

Commitment Invoice Details

Status:

* Commitment:

* Invoice Number:

* Date Received:

This is a retainage release:

Company/Contact:

Date Due:

3. Select an action and click **Take Action** button to move process along; possible actions are:
 - a. **Approved**– Select this action if all information is entered and process is ready to move forward.
 - b. **Revise to PM or Initiator**-Select this action if after reviewing the information entered, the process needs to get sent back to the Initiator to make updates. Comments will be required upon taking this action

06 - Potential Change Order (PCO) - 6

AVP Review:

1. Click process name to open **Potential Change Order (PCO)**.

Processes		Reports (0)	
Process	Subject	Step	
<input type="checkbox"/> PCO - 6	Test	Start	

2. Review the information, Required fields will have a red asterisk (*) and the process cannot be submitted until all required fields have been completed.

Confirm recommendation of a Change Order. You may override this selection.

*** Is CO Needed:** CO Examples: Cost changes, Time Changes, DOP (ODP), Added Scope, or Owner Contingency Use
 Yes No

PM: Funding
 Comments/Notes:

Project ID Number:

Schedule Impact (Days):

Is this E&O (errors & omissions)?

Reason for Change Order:

Other Reason for Change Order:

Type:

Funding Source:

DESCRIPTION - provide a concise description of the change order request:

*** JUSTIFICATION - Explain why this Change Order Request is necessary:**

CONTRACT - Explain why this Change Order Request is not part of the original Contract:

EFFECT ON PROJECT - Provide the effect(s) on operations, maintenance, cost, and schedule:

PAYMENT - Explain the source of the funds:

3. Select an action and click **Take Action** button to move process along; possible actions are:
 - a. **Approved**– Select this action if all information is entered and process is ready to move forward.
 - b. **Revise to PM or Initiator**-Select this action if after reviewing the information entered, the process needs to get sent back to the Initiator to make updates. Comments will be required upon taking this action

06 - Potential Change Order (PCO) - 6

[Delete Instance](#)
[Workflow Override](#)
[All Fields View](#)
[Instructions](#)

[Take Action](#)
[Check Spelling](#)
[Print](#)
[Copy](#)
[Delegate](#)
[Save](#)
[Cancel](#)

Accept
-- Please select an action -- ▾
Take Action
Check Spelling
Print
Delegate
Save
Cancel

Project: 1 ! Training Project ***** Process Document: 2 CO - 1 Show History Current Actors Current Workflow Step: 3 Procurement Review C Show Workflow Diagram Subject: 4 CO Initiated on 9/22/2016 6:57:35 PM Status: 5 Submitted	Project Number: 6 1111111111 Overall Due Date: 7 Step Due Date: 8
--	--

Process Description:

Each time you open a process to perform your function within a project, you will see the Process Header. The process header contains information that can help you identify where you are within a process, within a project.

1. **Project:** Project Name
2. **Process Document:** The process instance
 - [Show History](#): Will display a historical list of actions taken within this process instance
 - [Current Actors](#): Will display a list of actors responsible for the process in its current step
3. **Current Workflow Step:** The name of the current step
 - [Show Workflow Diagram](#): Will display the workflow diagram, highlighting the current step where this instance is with a blue frame
4. **Subject:** Displays the specific process instance subject
5. **Status:** Displays the process' current status
6. **Project Number:** Displays the project number
7. **Overall Due Date:** Date the process needs to be completed by *(If applicable)*
8. **Step Due Date:** Date this step in the process needs to be completed by *(If applicable)*

Support:

Training Resources

Please visit the FP&C website for a variety of e-Builder training resources both in print and video.

<http://fp.ucf.edu/resources/ebuilder/>

Need e-Builder Help?

Please call (888) 288-5717 or email support@e-builder.net. Thank you!

For UCF Project Support

e-Builder System Admins can be reached at eBuilderadmin@ucf.edu

Notes and Comments: