QUICK REFERENCE GUIDE CREATING

ZERO DOLLAR CHANGE ORDER

In order to track and record a Design Build

A. In SiteManager for:
   1. the work performed by the contractor in the field by Quality Control inspection
   2. Certifications of all permanent work
   3. Testing result by the Quality Control Services or Quality Control Inspection
      a. Concrete tests (air/slump/cylinders)
      b. Earthwork tests (compaction and gradation)
      c. Asphalt (cores and tack coat)
   4. Sampling requirements – i.e. bolts, geotech fabric, fence etc

B. In Sitemanager and EBO for Subcontractors:
   1. for specific work items in addition to the pay items (LS) via EBO (CONR 89)
   2. in SiteManager actual work performed

A. Zero Dollar change order is to be created utilizing standard specification items of work representative of the work on the D-B contract. A standard Change Order for Extra Work is to be created in SiteManager as any other change order for new work (extra work) except:
   1. The Change Order will select only new items from the existing approved list of specifications in the State system – suggested to utilize only standard specification items so that a certifications in the MID (material inspection detail) window will be available
   2. The new items will only have zero dollar ($0.00) as their price
   3. The quantity for the items will be estimated (if you believe there will be 1900 LF of an item select 1900 or 2000 LF for the quantity do not just select 1 as the quantity – this will result in emails when running an estimate based on quantity recorded by the inspection. – select on the high end for quantities – at the end of the project a zero change order to resolve quantities is to be created.
   4. The explanation for these items will be
      a. ‘general’ explanation:
         “The ‘Zero Dollar’ change order is created as per the Conformed RFP Part 2 Section DB 112-7.1 in order that Site Manager may use full functionality to track the material acceptances, tests and quantities for the Contract.
         In addition, Civil Rights (EBO) will be populated by the items so as to track work performed by Sub Contractors (DBE’s as well as other Subs) and the Prime’s work for the Contract.”

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b. ‘overrun’ needing additional quantity (if underestimated):
“The initial change order for these items was estimated prior to established “release for construction” plans and require additional quantities in order to represent actual field conditions. The final build will establish final quantities at a later date.”

c. ‘final out’
“The final build for the project has been established, this change order is to reduce or increase quantities to final quantities in order to close out contract.”

Create the Change Order – follow steps of “creating Change Order new Items” QRG 20 attached with notes
See header shot below for labelling change order
Quick Reference Guide
Change Order – New Item

1. Log on to Site Manager
2. Double-click “Change Orders”
3. Double-click “Change Order Maintenance (+)"
4. Double-click “Header"
5. On ‘Services’ menu select “Choose Keys”
   (choose contract you want the CO in by choosing “Contract ID’ and selecting the D#<double-click>)
6. In ‘Description’ field type “Assignment of Specification Item”
7. In the ‘Reason Code’ dropdown list choose the appropriate reason for the CO
8. In the ‘CO Type’ dropdown list select “Change Order”.
9. In the ‘Functions’ area select the “Extra Work” check box
10. Select “Save” on the tool bar
11. Click on the “Items Tab” – the CO Items window will now be displayed
12. Click on the Toolbar “New”
13. In the ‘Project Nbr’ dropdown list select your PIN
14. In the ‘Category Nbr’ dropdown list select the category (if more than one fiscal share - choose only the majority fiscal share -one with most funding)
15. In the ‘Line Item Nbr’ field type in the last item (sequence number) in the contract plus two
   (numbers in sequence – eg. if 0990 is last number, next is 0992) – you can check the “Get Next Line Number Report” in Business Intelligence – Change Orders
16. In the ‘Item Code’ field type the item number you are using then right click “Filter Search” to find your
   exact Item - begin with generic - if drainage 603 or 604 , if structural concrete 555, if steel 557 etc
17. In the ‘Unit Price’ field type $0.00
18. In the ‘Proposal Line Nbr’ field, if the Field is blank, type the ‘Line Item Nbr’ you established
   (should be the same) otherwise leave the default value
19. There is no supplemental description required.
20. In the ‘Item Code’ field, “right click” – SM displays pop-up window from which you can copy
the item code (using copy and paste) in the “Change Order Item Description” field.

21. On the ‘Item and Supplemental Description’ field, “right click” – SM display pop-up where you
  can then copy.

22. In ‘Change Order Item Description’ field “paste” the item description.

23. In ‘This Change Order’ field, type the quantity you are adding; select “Save” on the tool bar (remember to
  estimate up).

24. Select “Save” on the tool bar – repeat for all new items.

25. Click the Explanations Tab” – to begin writing/selecting explanation.

26. Select type of Explanations – “General Change Order Explanations” – see explanations on page
  1 and 2 of this QRG.

27. Click on All Items that Explanation applies to in the Change Order Line Items Pane - SM should
display a check mark to the left of the column.

28. Select ”Save” on the tool bar.

29. Click ”Header Tab”.

30. Go to ”Services” menu and select ”Calculate Change Order”.

31. The Change Order should calculate to zero dollar $0.00 - if not go back to item tab and re-check
  all items have zero dollar for unit price.

32. Will override Change Order before processing follow steps from ’override’ QRG.
NOTE: ON DESIGN BUILD CONTRACT ALL CHANGE ORDERS NEED TO BE OVERRIDE BY PM (CONSULTANT RE) IN ORDER TO INCLUDE THE QAE ROLE AND FED OVERSIGHT

ONLY the PM can “Override” a Change Order – once an Asst PM creates it they do NOT change to “pending” – the PM must then go into SM and perform the override:

1. On the Header window select the ‘Override Approval Rules’ check box.
2. Then change the Change Order to “Pending” status (draft to pending)
3. Select “Save” on the tool bar – SM should display a message confirming the change in status
4. Click “Yes” in the message that is prompted
5. Click “New” button to the right to prompt the levels to be filled in

Do NOT click “OK” UNTIL both levels required are chosen by clicking “New” for each level In the ‘Groups for Approval’ area you must select a person from each level

Upon selecting the PM ,the DBCONQAE and RCO click the "OK" button on message that informs you that mail has been sent - SM will now display the Header window in inquiry -only mode with a "Pending" status. Click 'close' on the tool bar,
Once the CO is approved the items will be in SM and automate into EBO.