



UNIVERSITY OF ILLINOIS SYSTEM

Construction Change Order

Training Document

Table of Contents

Overview	3
Change Order Created from Issue	4
Create a Construction Change Order	7
Change Order Action Buttons	9
Workflow	10
Send a Construction Change Order for Approval	11

Overview

Construction Change Orders will mostly be processed and auto created from the Issues Application. But the Change Order Application can also be used to create Construction Change Orders for an existing Contract against your available budget.

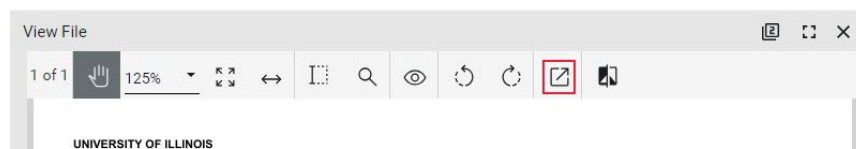
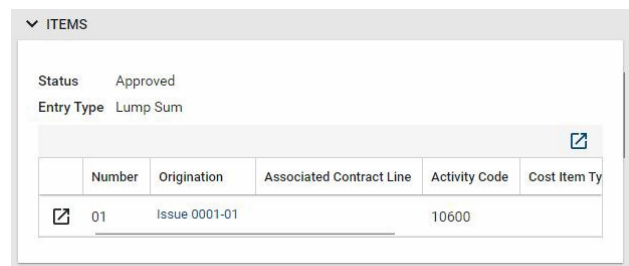
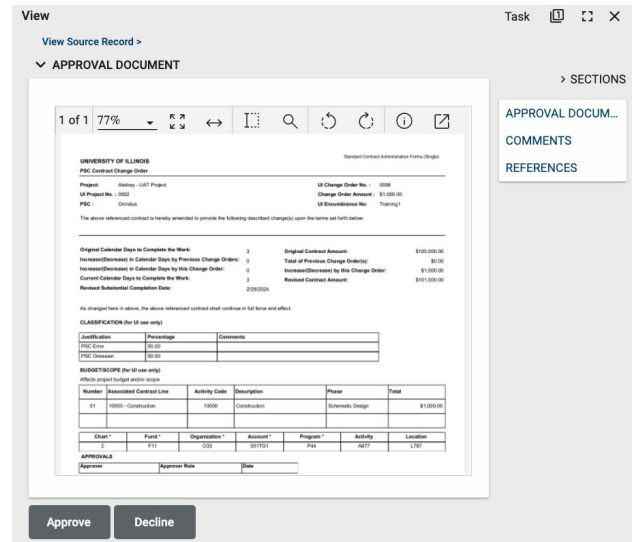
The system will track the Schedule of Values for the Change Order. Cost amounts are tracked in Work Breakdown according to status.

To access the Expense Change Order application, open the Apps repository. Under the Cost Management suite of applications click on Expenses. This will launch the Expenses Applications which will include:

- Contracts
- **Change Orders**
- SOV Breakdown
- Pay Requests
- Purchase Orders
- Purchase Order Change Orders
- Invoices

Change Order Created from Issue

1. When a Change Order Type Issue is approved and it has a Cost or Schedule Impact, a Change Order for each contract will be created.
2. The number of Change Orders per Issue will depend on the delivery method and number of Impacted Contracts.
3. Once the Issue has been processed into Change Order(s) a Task and an Email will be sent for each change order to the Project Manager (PM) for review and approval.
4. When the PM opens the Task, they will see a screen similar to the image on the right. The Approval Document will summarize the change order information for that contract. Review all change orders associated with the previously approved Issue.
5. To obtain vendor signatures after review is complete, use the portable view from the related Issue for the change order(s).
6. To download the Issue portable view, open the change order task, then click **View Source Record** at the top.
7. Once in the change order record, go to the Items grid, then click the Issue number link in the Origination column. This will take you to the associated Issue in the Issues App. (You may also go directly to the Issues App if you already have the number.)
8. Once in the Issue record, click **View** at the top. This will open the portable view.
9. Download the portable view to pdf by clicking the Open PDF button as shown in the screenshot.



10. Add the associated change order number(s) that resulted from the Issue at the top of the PDF, then change the “UI Change Order No” to “UI Issue No” and change “RFP Amount” to “Total Change Order Amount” in the header.

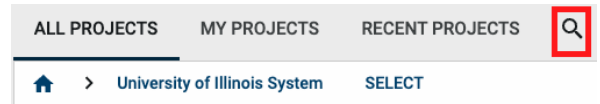
UNIVERSITY OF ILLINOIS		Change Orders 0007, 0008, 0009 resulted from Issue 003	
CONTRACT RFP			
Project: Sample Project Name		UI Change Order No.: 0003	
UI Project No.: A26001		RFP Amount:	\$4,000.00
The above referenced contract is hereby amended to provide the following described change(s) upon the terms set forth below:			
Reason for Urgency:			
Sample Issue Scope of Work Statement.			

11. Send the revised PDF to vendors for signatures.
12. Once the change order form is signed by all applicable vendors and campus approver, the PM will open the Task for change order approval and attach the signed change order form in the References section before clicking **Approve**.
 - a. For multi-prime projects, the signed change order only needs to be attached in the Contractor with Assigned (CWA) change order task.
 - b. For multi-prime projects, the PM will also need to click **Approve** on ALL related assigned contractor change order tasks.
13. After the PM approves, the Contract Specialist will receive a Task and an Email. When the Contract Specialist clicks on the task, the Change Order Approval Document will open on the right. Scroll down to the References section and download the signed document. Upload the signed change order into Contracts+ and follow the typical procedures for Contracts+ to execute the change order. If multi-prime, the Contract Specialist will download the change order form from the CWA record.
 - a. In the subject line of Contracts+, enter narrative similar to following “[Project Number] Kahua Change Orders 000X, 000X, and 000X [CWA/Single Prime/Contractor no Assignment Company Name]”.
14. After the change order is executed in Contracts+, the Contract Specialist will upload the fully executed change order document into the References section of the appropriate CWA/SP/CNA change order task. Include the suffix “Executed” in the

- file name. Then click **Approve**. For multi-prime projects, the Contract Specialist will need to click **Approve** on all related assigned contractor change orders as well.
15. After the Contract Specialist clicks **Approve**, the Financial Manager will receive a Task and an Email that the change order(s) is/are ready for their review and approval.
 16. When the Financial Manager opens the Task they will see a screen similar to what the PM and Contract Specialist saw outlining the details for the impacted contract.
 17. The Financial Manager can scroll down to the References section to see the final executed change order document. If the Financial Manager had not already updated Banner, they would do so now before they hit **Approve**.
 18. When the Financial Manager clicks **Approve** on each change order, the Change Order(s) will be Approved in Kahua.
 19. If the Financial Manager clicks Approve and receives a message saying there is not enough Budget to support the Change Order, click **Decline** and note that there is not enough budget to support the Change Order in the comment box.
 20. This will send a Message and a Notification to the Project Manager selected in the Project Details.
 21. The Project Manager can then create a Budget Adjustment or Budget Change to ensure the Budget supports the Change Order. Refer to the Budget Adjustment or Budget Change Training guide on these processes.
 22. Once the Budget Supports the Change Order, the Project Manager can navigate to the Change Order that was declined and then resend it to the Financial Manager for approval by clicking on the **Send for Approval** button.
 23. Once the Change Order(s) are approved, the affected contractors will receive a notification. They can then navigate to the Expense SOV Breakdown Application in the Project to update their Schedule of Values. Refer to the Schedule of Values (SOV) Training Guide for how to update the Schedule of Values.

Create a Construction Change Order

1. This process is for University Staff Only. All Capital Construction Change Orders should start from an Issue (see pages 4-6).
2. To create a new Construction Change Order, navigate to the appropriate project and go to the Expense Application.
3. To do this navigate using the Project Finder by:
 - a. Clicking on Project Finder in the left side Navigation,
 - b. Selecting the Project where the Contract was created.
4. You can also use the Search functionality in the Project Finder to locate you project by:



- a. Clicking on Project Finder in the left side Navigation,
 - b. Clicking on the Magnifying Glass icon next to Recent Projects, as shown in the image below,
 - c. Typing out the Project Name and clicking on the Project.
5. Once in the project go to the Expense Application by clicking on Applications and then searching for Expenses using the Search Bar.
 6. Select the **Change Orders** tab, then click the **New** button to open a new Change Order.
 7. A new form will open on the right side of the screen.
 8. Select the Contract that the Construction Change Order needs to be created against.
 9. Populate the Details such as Date, Description and Category.
 10. In the Scope section enter the Extension Days and any other relevant information in the Scope of Work & Notes fields.

Total Save To Calculate...

▼ DETAILS

Contract

Field is required.
Number
0006


Date

Author Data Migration - Onindus

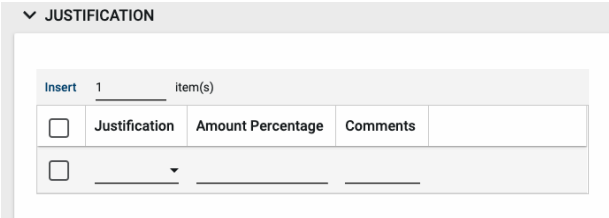
Description

Category

View Template View Name: Change Order
Template Name: Default

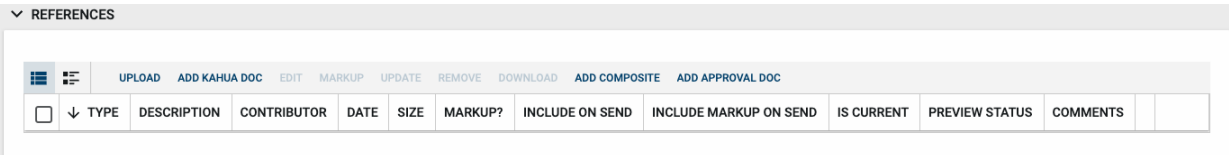
11. In the Dates Section enter the Revised Substantial Completion Date.
12. To add Change Order line items, navigate to the Items grid.
 - a. To add multiple line items, enter how many lines you will need and click **Insert**.
 - b. Select the Associated Contract Line and fill out the remaining details regarding this record.
13. To view the Change Order Items in further detail, click the more details  icon next to the Item number.
 - a. This view allows for additional detail on the item such as the Scope of Work, Notes, and additional Comments.
 - b. Use the Previous and Next action buttons to sort through the Items if needed.
14. Click **Done** once details have been added.

15. In the next section you can add the Justification or multiple Justifications for the Change Order along with the Amount Percentage and Comments.



Note: The Justification Amount Percentage must total to 100 across the lines added.

16. Documents can be attached to the record under the References section. The user can either:



- a. **Upload** a document saved on their computer.
 - b. **Add Kahua Doc** to reference a document that is stored within Kahua's File Manager Application.
 - c. **Add Approval Doc** which is used anytime a record is being routed for Review or Signature.
17. Once all details have been filled out, click **Save/Close** and then click on **Submit for Signature**.

Change Order Action Buttons

Once the fields within the record have been completed and saved, the users can select from several actions:

SEND **EDIT** **VIEW**  **DELETE** **HISTORY** **IMPORT ISSUE ITEMS**

- **Send** – Use messaging to send record details to others (NOT to be confused with a workflow)
- **Edit** – Update and maintain the record
- **Delete** – Select this action button to delete a record (typically permission based, so all may not see this)
- **History** – All updates/changes are tracked
- **Import Issue Items** – It will import existing Issue Items from the Issues Application


Send

- Do not confuse **Send** with using the workflow buttons in any application
- Documents can be sent via a message within Kahua to either existing Kahua users or users outside of Kahua by entering their email address and clicking **Enter**
- The documents are treated as attachments, and the message can be copied to the **Communications** application by checking the box

Edit

- The record can be updated as needed during the process
- If the document is out for Review or Signature, **Edit** will not be available

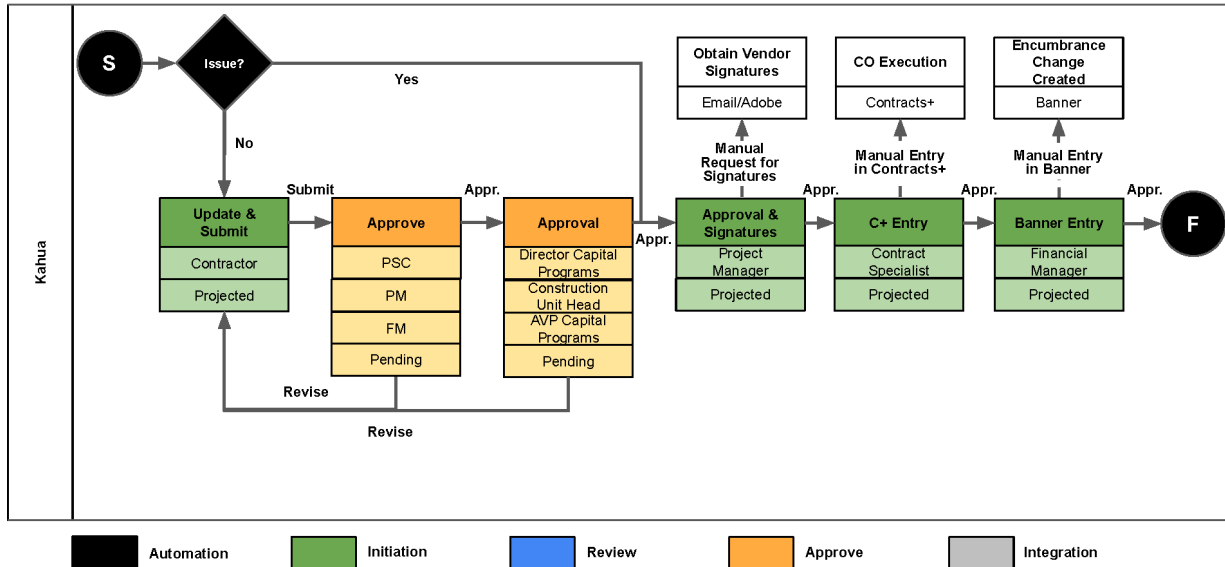
View

- Records can be viewed as a Portable View in which a PDF version of the data is generated and can be printed out. Select the **PDF Icon**  to generate a printable PDF version of the document

History

- The **History** action button provides details regarding all activity (Creation, Updates, Saves, etc.) performed on the record
- To see specific details related to the updates made, click the View Edit button

Workflow



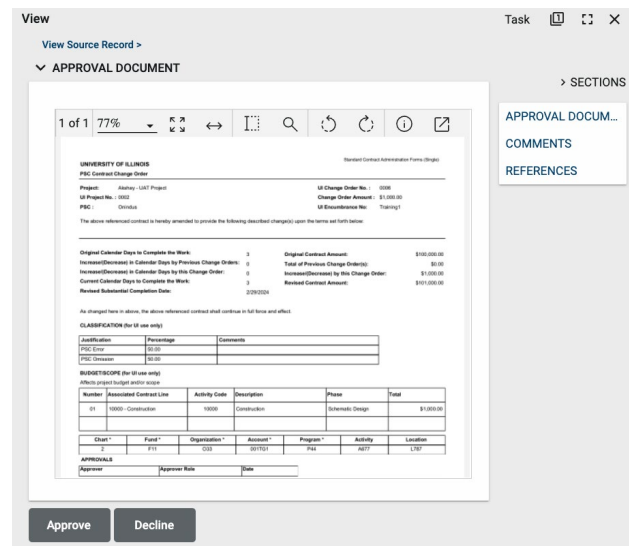
Order	Role Type (Name or Actor)	Approval Threshold	Approval Limit
1	Change Order Author	None	None
2	PSC	None	None
3	Project Manager	None	None
4	Financial Manager	None	None
5	University Director Capital Programs	> \$25,000	None
6	University Construction Unit Head	> \$75,000	None
7	Associate Vice President of Capital Programs & Utility Services	≥ \$100,000	None
8	Financial Manager	None	Unlimited

Send a Construction Change Order for Approval

1. Once the Author/Creator of the Construction Change Order clicks on the **Submit for Signature** button the approval process is initiated.
2. The Construction Change Order will first be sent to the Author/Creator for their Approval for the Audit Trail.
3. The Author/Creator will receive an email in their inbox as well as a Task & Notification in Kahua.
 - a. The Task can be accessed by clicking on the Task icon located at the Top Right corner of Kahua.

4. Once the Task is opened the Author/Creator will see a screen similar to the Image on the right.

- a. The Author/Creator can select **Approve** or **Decline**.
- b. From the 2nd Approver onwards, they will see another option to **Revert to the Prior Approver**. This option can be used to clarify any doubts that could be answered by the previous Approver.



5. When the Author/Creator clicks on **Approve**, the change order will be sent to the PSC for Approval.
6. The Construction Change Order process will follow a Threshold Based Approval as outlined on Page 10 in the Approval Workflow Table.

When the Construction Change Order is approved the Author/Creator will be notified and they will need to navigate to the Expense SOV Breakdown Application in the Project to update the Schedule of Values. Refer to the Schedule of Values (SOV) Training Guide for how to update the Schedule of Values.