



PSC Amendment Training Document

Presented by: OnIndus



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Overview

The Expense Change Order application allows you to create a Change Order 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, please 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 Requests
- **Change Orders**
- Pay Requests
- Purchase Orders
- Purchase Order Change Orders
- Invoices



Create a Change Order

1. To create a new PSC Amendment, please navigate to the appropriate project and go to the Expense Application
2. To do this please navigate using the Project Finder by:
 - a. Clicking on Project Finder in the left side Navigation
 - b. Selecting the the Project where the Contract was created
3. 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. Type out the Project Name or Project Number and click on the Project
4. Once in the project go to the Expense Application by click on Applications and then searching for Expenses using the Search Bar
 5. Select the **Change Orders** tab, then click the **New** button to open a new Change Order
 6. Notice a new form on the right side of the screen
 7. Select the Contract that the Change Order/PSC Amendment needs to be created against
 8. Populate the Details such as Date, Description and Category
 - a. Select PSC Amendment under Category
 9. In the Scope section please enter the Extension Days and any other relevant information in the Scope of Work & Notes fields

ALL PROJECTS MY PROJECTS RECENT PROJECTS

Home > University of Illinois System SELECT

Total Save To Calculate...

▼ DETAILS

Contract ▼
Field is required.
Number
0006

Date 📅


Author Data Migration - Onindus

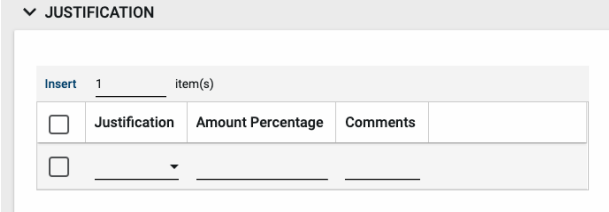
Description

Category ▼

View Template View Name: Change Order
Template Name: Default ▼

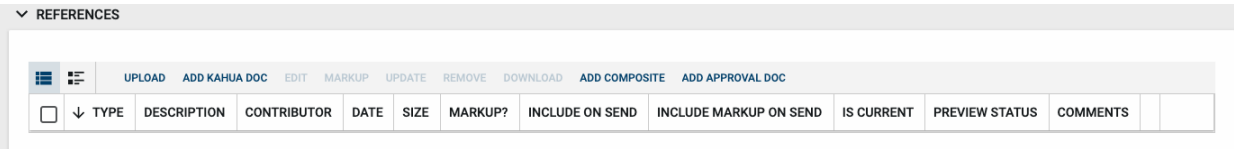


10. In the Dates Section please enter Revised Substantial Completion Date
11. To add Change Order line items, navigate to the Items grid
 - a. To add multiple line items, determine how many lines you will need and click Insert
 - i. More lines can be added using this same process
 - ii. Lines can be deleted by clicking the box next to each row and click Delete
 - b. Select the Associated Contract Line and fill out the remaining details regarding this record.
12. 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
13. Click Done once details have been added
14. In the next section you can add the Justification for the Change Order along with the Amount Percentage and Comments
 - a. **Note:** The Justification Amount Percentage has to Total to 100 across the lines added
15. Documents can be attached to the record under the References section. Attach the PSC Amendment Proposal, Updated Input Worksheet, and any other applicable documentation. The user can either:



▼ JUSTIFICATION

Insert	1	item(s)	
<input type="checkbox"/>	Justification	Amount Percentage	Comments
<input type="checkbox"/>	▼		



▼ REFERENCES

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

<input type="checkbox"/>	↓ TYPE	DESCRIPTION	CONTRIBUTOR	DATE	SIZE	MARKUP?	INCLUDE ON SEND	INCLUDE MARKUP ON SEND	IS CURRENT	PREVIEW STATUS	COMMENTS
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- 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.
16. Once all details have been filled out, click Save/Close and then please click on **Submit for Review**



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

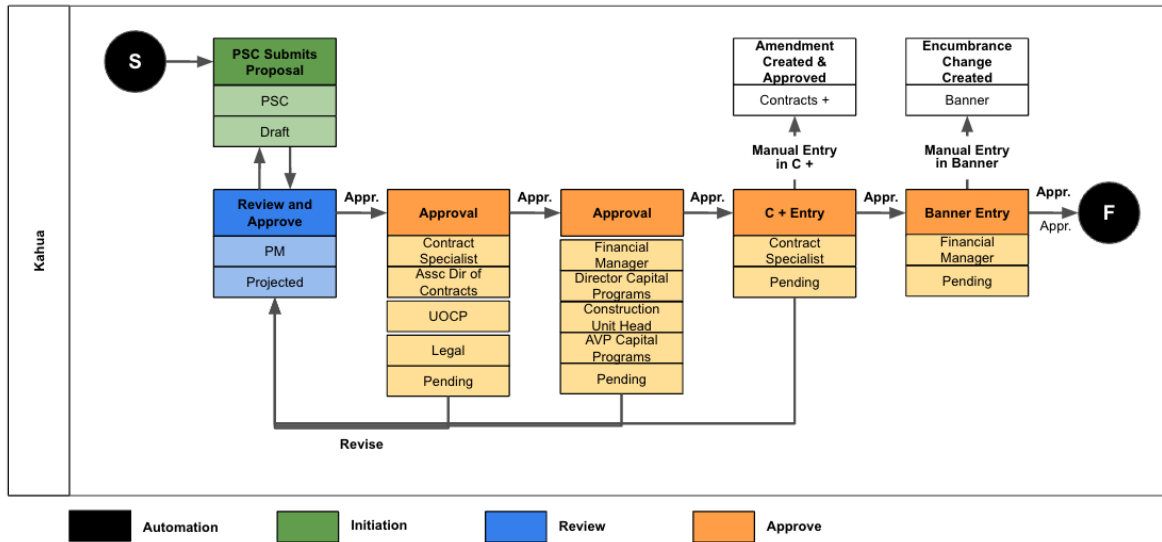
- Records can be viewed as a Portable View in which a PDF version of the data is generated and can be printed out. Select the **PDF Icon**  to generate a printable PDF version of the document

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)	Review Threshold	Review Limit
1	Project Manager Reviews	None	None

Order	Role Type (Name or Actor)	Approval Threshold	Approval Limit
1	Project Manager	None	None
2	Contract Specialist	None	None
3	Associate Director of Contracts	None	None
4	UOCP	None	None
5	Legal	None	None
6	Financial Manager	None	None
7	University Director Capital Programs	None	None
8	University Construction Unit Head	> \$75,000	None
9	Assistant Vice President of Capital Programs & Utility Services	≥ \$100,000	None
10	Contract Specialist	None	None



11	Financial Manager	None	Unlimited
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Send a PSC Amendment for Review

1. The Review process begins with the Submit for Review Button has been clicked
2. Once the Author/Creator of the PSC Amendment/Change Order clicks on the Submit for Review button the review process is initiated

3. The PSC Amendment/Change Order will be sent to the Project Manager for Review where the Project Manager 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 Project Manager will see a screen similar to the Image on the right
5. When the Project Manager clicks on the Reviewed Button and a Message pops up similar to the image on the right, this indicates that the Budget Cost Code cannot support this PSC Amendment
6. To correct this, the Project Manager should go to the Budget/Budget Change application and create a new transaction so that the Cost Code can support the Amendment.
7. Once done, the Project Manager can come in and click on the Reviewed Button
8. This will send the transaction to start the Approval Process

View Source Record >

APPROVAL DOCUMENT

1 of 1 95%

UNIVERSITY OF ILLINOIS
PSC Contract Change Order

Project: Onidius Production Testing
UI Project No.: 0006
PSC: Onidius

UI Change Order No.: 0001
Change Order Amount: \$10,000.00
UI Encumbrance No.: T123456

The above referenced contract is hereby amended to provide the following described change(s) upon the terms set forth below:
Extension of Training Work

Original Calendar Days to Complete the Work:	0	Original Contract Amount:	\$800,000.00
Increase/Decrease in Calendar Days by Previous Change Order(s):	0	Total of Previous Change Order(s):	\$0.00
Increase/Decrease in Calendar Days by this Change Order:	2	Increase/Decrease by this Change Order:	\$10,000.00
Current Calendar Days to Complete the Work:	2	Revised Contract Amount:	\$810,000.00
Revised Substantial Completion Date:			

As changed here in above, the above referenced contract shall continue in full force and effect.

CLASSIFICATION (for UI use only)

Justification	Percentage	Comments
Client Requests	100.00	Adjustments to be made

BUDGETSCOPE (for UI use only)
Affects project budget and/or scope

Number	Associated Contract Line	Activity Code	Description	Phase	Total
01	20000 - FF&E Total	20000	Construction	Construction Documents	\$10,000.00

COMMENTS

Reviewed Return for Revision

Validation Messages:

Cost guard triggered for Item 01. Activity Code 20000's budget guard is \$100,000.00. Total guarded expenses would be \$110,000.00, meaning a shortfall of \$(10,000.00). Additional funding, or less expense is required.

OK



Send a PSC Amendment for Approval

1. The Approval process begins when the Project Manager Review is complete
2. Once the Project Manager clicks on the Reviewed button the approval process is initiated
3. The PSC Amendment/Change Order will first be sent to the Project Manager for Approval where the Project Manager 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 Project Manager will see a screen similar to the Image on the right
 - a. From the 2nd Approver onwards they will see another option to Revert to the Prior Approver
 - b. This option can be used to clarify any doubts that could be answered by the previous Approver
5. When the Project Manager clicks on Approve it will be sent to the next approver following a

Threshold Based Approval as outlined on Page-8 in the Approval Workflow Table

When the PSC Amendment/Change Order is approved the Author/Creator will be notified and they will need to navigate to the Expense SOV application in Project to update the Schedule of Values.

Please Refer to the SOV Guide on the process to update the Schedule of Values

The screenshot shows a web application interface for reviewing a PSC Amendment/Change Order. The document is titled "UNIVERSITY OF ILLINOIS PSC Contract Change Order". It includes fields for Project Name, PSC Number, and Change Order Number. The document is divided into sections for "CLASSIFICATION (for SI use only)" and "BUDGETSCOPE (for SI use only)". The "CLASSIFICATION" section contains a table with columns for Classification, Percentage, and Comments. The "BUDGETSCOPE" section contains a table with columns for Activity Code, Description, Phase, and Total. The document also includes a table for "APPROVALS" with columns for Approver, Approval Date, and Status. The interface includes a "View Source Record" button, a "Task" icon, and a "Sections" sidebar with links to "APPROVAL DOCUMENT", "COMMENTS", and "REFERENCES". At the bottom, there are "Approve" and "Decline" buttons.

Classification	Percentage	Comments
PSC Item	0.00	
PSC Item	0.00	

Activity Code	Description	Phase	Total
10000	Construction	Construction	\$1,000.00

Approver	Approval Date	Status