

FacilityMax **Change Order Procedures – Project Managers**



Possible statuses that PMs will receive:

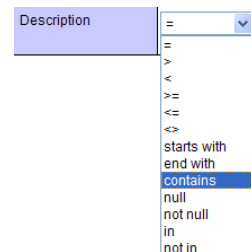
Who sets it to this status?	Who receives this status?	Status	Description
PM	PM	CM-PM REQUEST	CM or PM is requesting a change order. If CM, the request needs to go to PM for approval.
PM	PM	PM APPROVE REQUEST	PM needs to approve the change order request by CM.
CN	PM	INCOMPLETE -CN TO PM	Contracts is missing information. PM should go to notes section to see what is needed and reply
AC	PM	INCOMPLETE -AC TO PM	Accounting is missing information. PM should go to notes section to see what is needed and reply.
AC	PM	SR AC APRVD – TO PM	Senior Management has approved and is forwarding to David Hobbs for approval

FIND A CHANGE ORDER

- Go to Module/Contract Administration, then Contract Administration/Project Contract



- Click on Search icon in toolbar
- From the drop down menu next to Description, click on Contains and type a part of the contractor's name
- Click  to execute search
- A list of all the contracts for that contractor will come up. Choose the contract you want to find the change order proposal for
- Use any other fields on this page to narrow your search including Status
- If you are looking for a particular status, select that status
- Click  to execute search






- A change order can also be found by first pulling up the contract. Then under View/Select, click on Change Order History to see all change orders for that contract and what status they are in. Each change order number is a link to open that change order

CREATE CHANGE ORDER PROPOSALS

**THIS PROCESS WILL *NOT* START A CHANGE ORDER WITH THE CONTRACTS DEPARTMENT
– IT IS FOR YOUR TRACKING USE ONLY FOR POTENTIAL CHANGE ORDERS**

CM or PM wants to enter a change order proposal for tracking

- Go to Module/Contract Administration/
Project Contract Change Order Proposal
- Start new CO Proposal  
- Change **Amendment Number** to a number that you will recognize
- Enter **Description**. Include Contractor name, Building, Project Name. If the CO is for a date change only, also enter in the description: DATE CHANGE ONLY – EXTEND TO XX/XX/XXXX. Do not put a date in the “New End Date” field. If you are extending the contract and adding a dollar amount, your comments would read “EXTEND TO XX/XX/XXXX AND ADD \$X.
- Choose **Contract**. If you see more than one line choice come up, it means that the contract has multiple Work Request numbers. You will need to be familiar with the line items to know which line to add your change order request to. Call Accounting if you don’t know which line to use.
- **Save** 
- You can create as many CO Proposals for tracking purposes as you want. They will not affect the contract until you create a CO and attach the proposal.



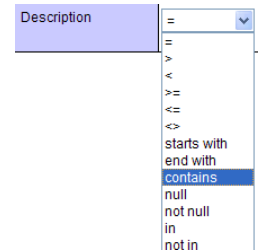
REQUEST A NEW CHANGE ORDER



- **Create a new Change Order**
- Go to Module/Contract Administration/Project Contract Change Order
- Start new Change Order
- Change **Change Order** to the correct # (This is the only thing that cannot be changed once you save).
 - o **For Change Order #, call Amendments A001, A002, etc. and Change Orders C001, C002, etc.**
 - o Use the Contracts Log or call Contracts to find out which number to use next.
 - o ****Not all Change Order numbers for existing contracts show in FMax.**

- Enter **Description**. Includes Contractor Name, Building, Project Name, Contract Number, Date Extension (if needed), and Dollar Amount.
 - o Ex: for a date change only: "IRS – UCB REROOF – PSU-09-C-110-60 – ADD \$800.00 – EXTEND TO 9/30/09." *Do not put a date in the "New End Date" field.*

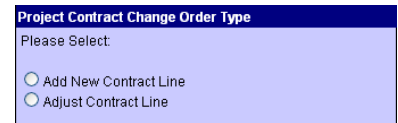
- Enter **Contract** Number or click on search icon next to Contract . It will come up with all contracts.
 - o Click on the search icon again . From the drop down menu next to Description, click on Contains and type a part of the contractor's name
 - o Click execute search
 - o A list of all the contracts for that contractor will come up. Choose the contract you entered the change order proposal for



- **With Change Order Proposals**
 - o If you have Change Order Proposals that you want to populate in this CO, toward the bottom of the screen on the right, click on **Load Proposals**
 - A list of all proposals you have entered for this contract will be shown. Click on the box to the left all off the proposals you want to load into this Change Order
 - Click green flag






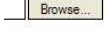





- **Without Change Order Proposals**
 - o If you are not loading any Change Order Proposals, click on the green plus sign next to Load Proposals

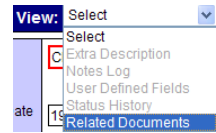
- The system will ask you if you want to add a new **Contract Line Item** or adjust an existing one. This relates to the Work Request Number – do you want to put the change order on a new WR#, or add it to one that is currently tied to this contract?
- In most cases, you will click next to Adjust Contract Line and click on the green flag
- The next page will allow you to pick the WR# you want to add this CO to. Click on the search icon .
- All WR#'s associated with this contract will be listed (in most cases there is only one.) Click on the number of the line you want the dollar change to be attached to.
- *If you have any questions about WR#'s, please call Accounting*
- Enter dollar amount of change order on the right side of the screen under **Change Amount**




- You can **Save** at this point if you don't want to lose your work
- After saving, click on Edit to make the required additional changes on the next page

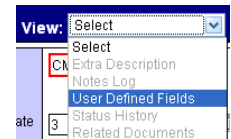
Attach quote (under View/Select/Related Documents)

- o Go to View/Select/Related Documents
- o Click on yellow post it note    (not paper clip) to add a document
- o Click on icon next to Flag and select General  
- o Click on Browse  
- o Find your document and double click on it
- o Click on attach 
- o Enter Title for document – something like Quote or Estimate Sheet
- o Click Save , green flag , green flag 



- **Fill out User Defined Fields** (under View/Select/User Defined Fields)

- o Go to View/Select/User Defined Fields
- o Fill out all four fields: Project Manager, Construction Manager, Billing Type and Stimulus
- o Enter Title for document – something like Quote or Estimate Sheet
- o Click the green flag 





- **Change Status** to PM APPROVE REQUEST if you are a CM

- Change Status to PM APRVD -TO CNTR if you are a PM

- **Save** 








RESPOND TO PM APPROVE REQUEST STATUS

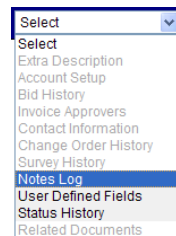
Construction Manager has requested a change order that needs PM approval before being sent to Contracts

- If the project is not in your Personal Query Count on your FacilityMax desktop, use the instructions to Find a Change Order
- Click on Edit 
- Review **Description** – It should include Contractor Name, Building, Project Name, Date Extension (if needed), and Dollar Amount.
 - o Ex: for a date change only: “IRS – UCB REROOF – PSU-09-C-110-60 - DATE CHANGE ONLY – EXTEND TO 9/30/09.”
 - o Ex: for date change and dollar amount: “IRS – UCB REROOF – PSU-09-C-110-60 - EXTEND TO 9/30/09 AND ADD \$500.00.”
 - o *Make sure the “New End Date” field is empty.*
- Confirm that a quote has been attached (under View/Select/Related Documents)
- Confirm that the User Defined Fields have been filled out correctly
- Review quote for accuracy
- Change Status to PM APRVD -TO CNTR
- Save 

RESPOND TO INCOMPLETE – CN TO PM STATUS








Contracts has changed the status to INCOMPLETE –CN TO PM and sent the change order back to you with a question.

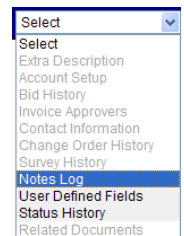
- If the project is not in your Personal Query Count on your FacilityMax desktop, use the instructions to Find a Change Order
- Go to Notes Log (View/Select/Notes Log) to find out what information is still needed
- Review note with request from Contracts
- Reply to the note by adding a new note
 - o Click on green plus sign    to add a new note
 - o Type in red outlined notes field
 - o Click Save , green flag 
- Click on Edit 
- Change the status to PM RETURNING TO CNTR
- Save 



RESPOND TO INCOMPLETE – AC TO PM STATUS



Accounting has changed the status to INCOMPLETE –AC TO PM and sent the change order back to you with a question.

- If the project is not in your Personal Query Count on your FacilityMax desktop, use the instructions to Find a Change Order
- Go to Notes Log (View/Select/Notes Log) to find out what information is still needed
- Review note with request from Accounting
- Reply to the note by adding a new note
 - o Click on green plus sign    to add a new note
 - o Type in red outlined notes field
 - o Click Save , green flag 
- Click on Edit 
- Change the status to PM RETURNING TO ACCT
- Save 



RESPOND TO ACCT APRVD - TO PM STATUS

Contracts has written the requested change order, gotten internal approval and has attached it for your review

- If the project is not in your Personal Query Count on your FacilityMax desktop, use the instructions to Find a Change Order
- Review PDF of Change Order under View/Select/Related Documents
- If there are questions or concerns, call Contracts directly to resolve
- Keep any notes in the Notes Log (View/Select/Notes Log)
- Once approved, click on Edit 
- Change the status to PM APRVD –TO AST DIR
- Save 

Change Order Statuses in Facility Max

Who sets it to this status?	Who receives this status?	Status	Description
PM	PM	CM-PM REQUEST	CM or PM is requesting a change order. If CM, the request needs to go to PM for approval.
PM	PM	PM APPROVE REQUEST	PM needs to approve the change order request by CM.
PM	CN	PM APRVD -TO CNTR	PM has approved the CO and is sending it to Contracts to write
CN	CN	PREPARE CHANGE ORDER	Contracts is preparing change order
CN	PM	INCOMPLETE -CN TO PM	Contracts is missing information. PM should go to notes section to see what is needed and reply
PM	CN	PM RETURNING TO CNTR	PM is providing the requested missing information and is returning the change order request to Contracts
CN	BOB	NEED MGR APPROVAL	Change order is written and awaiting approval from Bob Voica
BOB	AC	MGR APPROVED -TO ACTG	Bob Voica has approved change order and is sending it to Accounting for approval
AC	PM	INCOMPLETE -AC TO PM	Accounting is missing information. PM should go to notes section to see what is needed and reply.
PM	AC	PM RETURNING TO ACCT	PM has entered notes providing the requested missing information and is returning the change order request to Accounting
AC	AC	ACCT APRVD - TO SR AC	Accounting has allocated funds for the Change Order and is forwarding the Senior Management for approval
AC	PM	SR AC APRVD – TO PM	Senior Management has approved and is forwarding to David Hobbs for approval
PM	DAVID	PM APRVD -TO AST DIR	PM has reviewed and approved the change order and is sending it to David Hobbs
DAVID	CN	AST DIR APRVD -TO CN	David Hobbs has reviewed and approved change order and is sending it to Contracts to send out for Contractor signature
CN	CN	SENT TO CONTRACTOR	Change Order has been sent to Contractor for signature
CN	CN	CONTRACTOR SIGNED	Received signed change order from Contractor
CN	AC	CHANGE ORD EXECUTED	Change order has been executed
AC	AC	ENCUMBERED	Accounting encumbered change order value
		HOLD	Hold
		ERROR	Error
		CANCEL	Change order canceled