Change Orders

AASHTOWare Project Construction & Materials™ Quick Reference Guide

Additional Quick Reference Guides and Computer Based Training files are available from ODOT.

Key to Action Buttons

- Actions: Global Actions menu (top of the screen)
- Component Actions menu (on headings)
- Row Actions menu (on rows)

Roles:

CM-RE, CM-CAU, CM-CAS, CM-ARE, CM-CAE, CM-Inspector

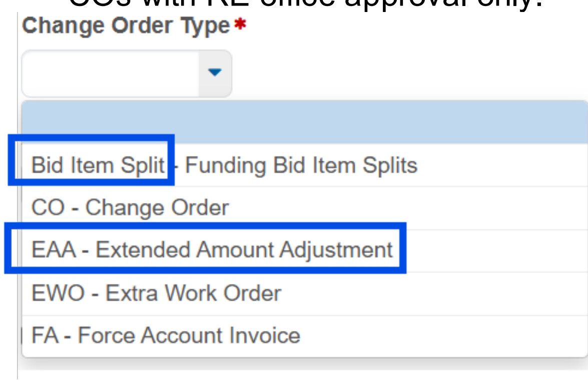
Background:

- The change order process allows your agency to make legal changes to a signed contract. The change order process includes creating, approving, and tracking contract changes.

Adding a Change Order:

1. From the **Construction** component, click the **Contract Progress** link.
2. Search for and find the desired contract.
3. Click the **Contract ID** link.
4. Click the **Change Orders** tab.
5. Click the **Add** button.
6. In the **Change Order Date** field, enter the estimated start date.
7. Enter the required fields for a new Change Order record: **Description**, **Change Order Type** and **Author.** (The system pre-populates this field with the logged in user.)
    - Change Order Type: Bid Item Split and EAA are CO's that require only RE office approval.

COs with RE office approval only.



Rev 09-09-2025

8. Click the **Save** button.
   - **Note:** The gray bar at the top of the screen displays the **Change Order Number** and the current **Status**.
   - **Note:** A change order can be updated while in Draft Status. When moved to Pending Approval Status, edits can no longer be made. To make an edit change the CO back into Draft status.

9. If there is an Explanation that is at the Change Order level, click on the **General** tab. In the **Change Order Explanations** section, type 1,2,3,4, etc. in the **Order field** (sequential number) field.
   - The **Order** field contains a number that represents the relative position of the change order reference and supplemental explanations on components and the change order report.
   - If there is a Reference Explanation associated with the Change Order, click in the **Reference Explanation Name** field and press Enter. From the list of **Explanations**, select the appropriate option for the Change Order.

10. If an additional Change Order level explanation is needed, enter that text in the **Supp Explanation** field.

11. Click the **Save** button.

Adding a Change Order Attachment:

1. From the **Construction** component, click on the **Contract Progress** link.
2. Search for and find the desired contract.
3. Click the **Contract ID** link.
4. Click the **Change Orders** tab.
5. Click the desired **CO Num** link.

6. From the component **Actions** menu, select the **Attachments** link.
7. Click the **Select File** button and attach your document.
   - **Note:** It is important to follow CO guidelines when formatting the PDF and labelling your attachment documents.
   - **Note**: Combine supporting documentation into one attachment, name the file: **CO000#Attachment##.** Use the comment box available to describe the nature of the attachment.
8. Click the **Save** button.

Adding Supporting Data Attachment:

1. From the **Construction** component, click on the **Contract Progress** link.
2. Search for and find the desired contract.
3. Click the **Contract ID** link.
4. Click the **Contract Documentation** quick link.
5. Click the **Document Submission** tab.
6. Click the **New** button.
7. In the **Description** field, enter and follow the Change Order naming conventions for the new document submission (**CO ## Supporting Documents**); then, click **Save**.
   - **Note**: FHWA Approval Date can be selected. If it applies**,** the RE Office logs the FHWA date and can leave a comment with the name of FHWA contact.
8. From your newly added row, click the row **Actions** menu and select the **Attachments** link.
9. Click the **Select File** button and attach your document.
   - **Note:** Be sure to follow the attachment order and naming conventions for Change Order supporting data (see next note).
   - **Note**: Combine supporting documentation into one attachment, name the file: **CO000#SupportingDataAttachment##.** Use the comment box available to describe the nature of the attachment.
10. Click the **Save** button.

Adding Increase/Decrease Items:

1. From the **Construction** component, click on the **Contract Progress** link.
2. Search for and find the desired contract.
3. Click the **Contract ID** link.
4. Click the **Change Orders** tab.
5. Click the **Show first 10** link or press Enter in the **Quick Find** search box.
6. Click the desired **CO Num** link.
7. Click the **Increase/Decrease Items** tab.
8. Click the **Select Items** button if the Change Order involves a quantity increase/decrease of an existing pay item.
9. In the search box, enter a partial description of the pay item that needs a quantity increase/decrease or press **Enter**.
10. Select the pay items that need a quantity increase/decrease.
11. Click the **Add to Change Order** button.
12. Click in the **Quantity** field and enter the quantity increase/decrease needed for the pay item. This can either be a positive or negative value.
13. In the **Change Order Increase/Decrease Items Explanations** section, click in the **Order** field if an Explanation is needed for the pay item being increased or decreased. Then, type a value, starting with 1, and follow order of operation (1,2,3, or 4).
14. Click in the **Reference Explanation Name** field and press Enter. If there is already a Standard Reference Explanation for this type of quantity increase/decrease, select the appropriate option from the results list. Follow current reason codes for options. To see the full list, from Home Page in AWP go to **Construction Reference Data, Change Order Explanations**.
    - **Note:** Multiple explanations can be used by choosing the payments codes from the drop-down menu in this section. At minimum, a **reason code**, **type of adjustment**, and CCO **work type** must be entered from the drop-down menu.
15. Click in the **Supp Explanation** field and enter a description if additional explanation is required for this quantity increase/decrease.
16. Click the **Save** button.

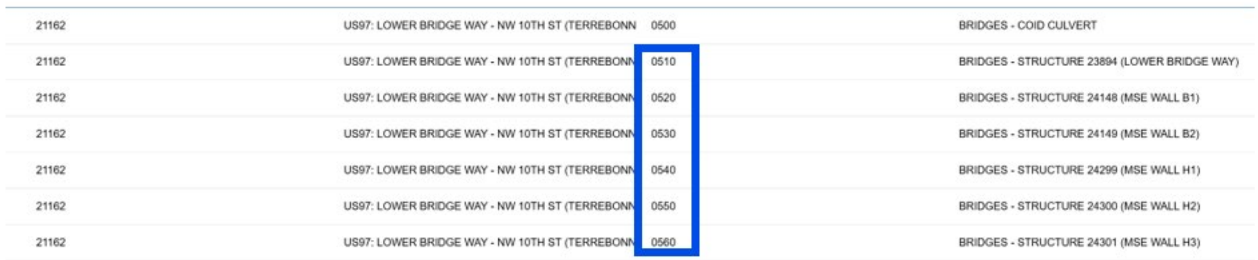
Adding Balance Completed Items:

1. From the **Construction** component, click on the **Contract Progress** link.
2. Search for and find the desired contract.
3. Click the **Contract ID** link.
4. Click the **Change Orders** tab.
5. Click the **Show first 10** link or press Enter in the **Quick Find** search box.
6. Click the desired **CO Num** link.
7. Click the **Increase/Decrease** tab.
8. Click the **Balance Completed Items** button.
9. Click the **Show first 10** link or press Enter.
   - **Note:** Only items indicated as complete will be listed.
10. Select the items that require balancing.
11. Click the **Balance Completed Items** button.
12. Click the **Save** button.

Adding New Items:

1. From the **Construction** component, click the **Contract Progress** link.
2. Search for and find the desired contract.
3. Click the **Contract ID** link.
4. Click the **Change Orders** tab.
5. Click the **Show first 10** link or press Enter in the **Quick Find** search box.
6. Click the desired **CO Num** link.
7. Click the **New Items** tab.
8. Click the **Select New Item** button.

9. In the **Reference Item** field, enter a partial description of the pay item that needs to be added to the Change Order or press Enter.
    - **Note:** Only 1 new reference item can be added to the Change Order at a time.
    - **Note:** There are only two reasons to select Misc. in this area (999 section).
        - Item does not exist on the schedule of bids.
        - Unit measurement for the item needs to be modified.
10. From the list of Projects, select the Project for the new reference item.
11. Select a Project Category that the item relates to.
    - **Note:** This is where we distinguish the spec section vs. special header categories for structures on the project. AWP adds special header categories as an option if an item is related to that structure. This affects financial tracking throughout the project.



21162	US97: LOWER BRIDGE WAY - NW 10TH ST (TERREBONN	0500	BRIDGES - COID CULVERT
21162	US97: LOWER BRIDGE WAY - NW 10TH ST (TERREBONN	0510	BRIDGES - STRUCTURE 23894 (LOWER BRIDGE WAY)
21162	US97: LOWER BRIDGE WAY - NW 10TH ST (TERREBONN	0520	BRIDGES - STRUCTURE 24148 (MSE WALL B1)
21162	US97: LOWER BRIDGE WAY - NW 10TH ST (TERREBONN	0530	BRIDGES - STRUCTURE 24149 (MSE WALL B2)
21162	US97: LOWER BRIDGE WAY - NW 10TH ST (TERREBONN	0540	BRIDGES - STRUCTURE 24299 (MSE WALL H1)
21162	US97: LOWER BRIDGE WAY - NW 10TH ST (TERREBONN	0550	BRIDGES - STRUCTURE 24300 (MSE WALL H2)
21162	US97: LOWER BRIDGE WAY - NW 10TH ST (TERREBONN	0560	BRIDGES - STRUCTURE 24301 (MSE WALL H3)

12. Click the **Add to Change Order** button.
13. Enter the **Quantity** and **Unit Price** for the new item added to the Change Order.
14. If additional fields need to be populated (e.g., **Funding**, **Supplemental Description**, etc.), enter those values at this point.
    - **Note**: Supplemental description needs to be the full pay item name.
15. In the **Change Order New Item Explanations** section, click in the **Order** field and type 1 (or the next sequential number).
16. Click in the **Reference Explanation Name** field and press Enter. If there is already a Standard Reference Explanation for adding a new item to a Change Order, select the appropriate option from the results list.
    - **Note:** Multiple explanations can be used by choosing the payments codes from the drop-down menu in this section. At minimum, a **reason code**, **type of adjustment**, and CO **work type** must be entered from the drop-down menu.
17. Click in the **Supp Explanation** field and enter a description if additional explanation is required for this new item.
18. Click the **Save** button.

Adding New Items – Spec Change/Plan Sheet Revisions:

1. From the **Construction** component, click the **Contract Progress** link.
2. Search for and find the desired contract.
3. Click the **Contract ID** link.
4. Click the **Change Orders** tab.
5. Click the **Show first 10** link or press Enter in the **Quick Find** search box.
6. Click the desired **CO Num** link.
7. Click the **New Items** tab.
8. Click the **Select New Item** button.
9. In the **Reference Item** field, enter a partial description of the pay item that needs a Spec Change/plan sheet revisions or enter from the 999 miscellaneous section.
    - **Note:** Only 1 new reference item can be added to the Change Order at a time.
10. From the list of Projects, select the Project for the new reference item.
11. Select a Project Category that the item relates to.
    - **Note:** This is where we distinguish the spec section vs. special header categories for structures on the project. AWP adds special header categories as an option if an item is related to that structure. This affects financial tracking throughout the project.

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12. Click the **Add to Change Order** button.
13. Enter the **Quantity** and **Unit Price** for the Spec Change item added to the Change Order.
    - **Note:** For a Spec Change item, enter **Quantity** = 1 and **Unit Price** = 0.001.
14. In the **Change Order New Item Explanations** section, click in the **Order** field and type 1 (or the next sequential number).
15. Click in the **Reference Explanation Name** field and press Enter. If there is already a Standard Reference Explanation for adding a Spec Change item to a Change Order, select the appropriate option from the results list.

- **Note:** Multiple explanations can be used by choosing the payments codes from the drop-down menu in this section. At minimum, a **reason code**, **type of adjustment**, and CO **work type** must be entered from the drop-down menu.

16. Click in the **Supp Explanation** field and enter a description if additional explanation is required for this new item.
17. Click the **Save** button.

Adding New Items – Unattached Items:

- An unattached item is an item added to the contract after the contract has been executed. Unattached items are included in contract categories and can be tracked on daily work reports but are not recognized as contract items by the system and cannot be included in a contract payment until they are added to the contract through a change order and the change order is approved. This is where Spec Change/additions/deletions/no cost changes will be entered.

1. From the **Construction** component, click the **Contract Progress** link.
2. Search for and find the desired contract.
3. Click the **Contract ID** link.
4. Click the **Change Orders** tab.
5. Click the **Show first 10** link or press Enter in the **Quick Find** search box.
6. Click the desired **CO Num** link.
7. Click the **New Items** tab.
8. In the **Unattached Items** section, click the **Select Unattached Item** button.
9. In the search box, enter a partial description or press Enter.
10. Select the unattached pay item(s) to be added to the Change Order.
    - **Note:** 12.5 Miscellaneous items in the 999 series will be used for Spec Changes.
11. Click the **Add to Change Order** button.
12. Click the **Expand/Collapse** arrow for each unattached item added to the Change Order and enter the **Quantity** and **Unit Price**.
13. If additional fields need to be populated (e.g., **Funding**, **Supplemental Description**, etc.), enter those values at this point.

14. In the **Change Order New Item Explanations** section, click in the **Order** field under and type 1 (or the next sequential number).
15. Click in the **Reference Explanation Name** field and press Enter. If there is already a Standard Reference Explanation for adding an Unattached item to a Change Order, select the appropriate option from the results list.
    - **Note:** Multiple explanations can be used by choosing the payments codes from the drop-down menu in this section. At minimum, a **reason code**, **type of adjustment**, and CO **work type** must be entered from the drop-down menu.
16. Click in the **Supp Explanation** field and enter a description if additional explanation is required for this new item.
17. Click the **Save** button.

Adding Time Adjustments:

1. From the **Construction** component, click the **Contract Progress** link.
2. Search for and find the desired contract.
3. Click the **Contract ID** link.
4. Click the **Change Orders** tab.
5. Click the **Show first 10** link or press Enter in the **Quick Find** search box.
6. Click the desired **CO Num** link.
7. Click the **Time Adjustments** tab.
8. Click the **Select Contract Time** button.
9. Click the **Show first 10** link or press Enter in the **Quick Find** search box.
10. Select the Contract Time record that requires Time Adjustment.
11. Click the **Add Time Adjustments to Change Order** button.
12. If the Contract is an Available Time or Calendar Time contract, enter a value in the **Adjustment Time Units** field. If the Contract is a Completion Date contract, enter a value in the **Adjustment Completion Date** field.
13. In the **Time Adjustment Explanations** section, click in the **Order** field and type 1 (or the next sequential number).
14. Click in the **Reference Explanation Name** field and press Enter. If there is already a Standard Reference Explanation for adding a Time Adjustment to a Change Order, select the appropriate option from the results list.

- **Note:** Multiple explanations can be used by choosing the payments codes from the drop-down menu in this section. At minimum, a **reason code**, **type of adjustment**, and CO **work type** must be entered from the drop-down menu.

15. Click in the **Supp Explanation** field and enter a description if additional explanation is required for this Time Adjustment.
16. Click the **Save** button.

Adding Contract Claims:

1. From the **Construction** component, click the **Contract Progress** link.
2. Search for and find the desired contract.
3. Click the **Contract ID** link.
4. Click the **Change Orders** tab.
5. Click the **Show first 10** link or press Enter in the **Quick Find** search box.
6. Click the desired **CO Num** link.
7. Click the **Contract Claims** tab.
8. Click the **Select Contract Claim** button.
9. Click the **Show first 10** link or press Enter in the **Quick Find** search box.
10. Select the Contract Claim record that will be associated to the Change Order.
11. Click the **Add to Change Order** button.
12. Click the **Save** button.

Viewing or Modifying Change Orders (Change Status to Draft if CO Status is NOT Approved):

1. From the **Construction** component, click the **Contract Progress** link.
2. Search for and find the desired contract.
3. Click the **Contract ID** link.
4. Click the **Change Orders** tab.

5. Click the **Show first 10** link or press Enter in the **Quick Find** search box.
6. Click the desired **CO Num** link.
7. Click the component **Actions** menu and select the **Change to Draft** task.

Assigning Force Accounts to a Change Order:

1. From the **Construction** component, click the **Contract Progress** link.
2. Search for and find the desired contract.
3. Click the **Contract ID** link.
4. Click on the **Change Orders** tab.
5. Click the **Show first 10** links, if displayed.
6. Click the desired **CO Num** link.
7. Click the **Force Accounts** tab.
8. Click the **Select Force Accounts** button.
9. Click the **Show first 10** links, if displayed.
10. Click the Force Account record that will be associated with the Change Order.
11. Click the **Add to Change Order** button.
12. Click the **Save** button.

Viewing Change Orders:

1. From the **Construction** component, click on the **Contract Progress** link.
2. Search for and find the desired contract.
3. Click the **Contract ID** link.
4. Click the **Change Orders** tab.

5. Click the **Show first 10** link or press Enter in the **Quick Find** search box.
6. Click the desired **CO Num** link.
7. Click the desired tab(s) to view or modify the Change Order data.
    - **Note:** Viewing the CO Report is recommended, as it gives a full overview of the change order all at once.

Next Steps: Go to QRG Change Order Reviews