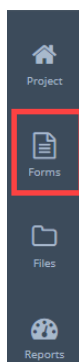


Potential Change Order – Create and Submit

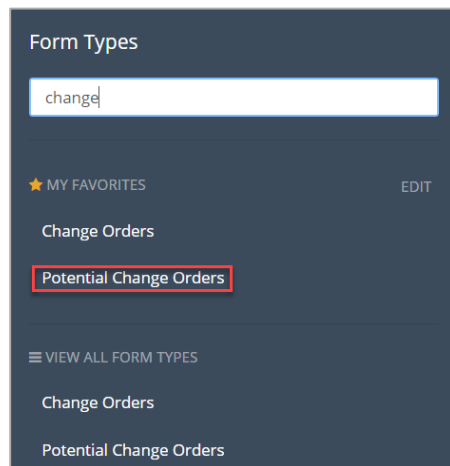
A Potential Change Order may only be created against an executed Contract. DGS will only initiate a change order if a potential change order has been entered in to ProjectTeam. Potential change orders should be created any time there is a potential for a change to time, cost or scope on a contract. This document is created by the vendor and submitted the DGS Project Manager for review and acceptance.

Creating a Potential Change Order

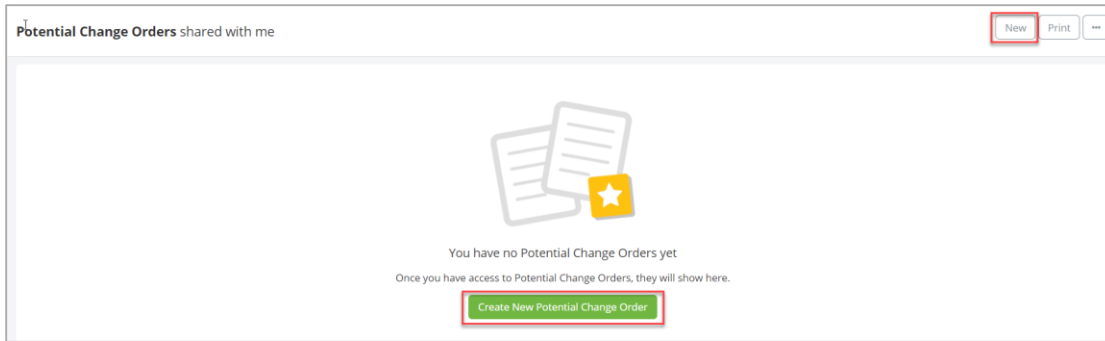
1. Navigate to the **Potential Change Order** within a project.



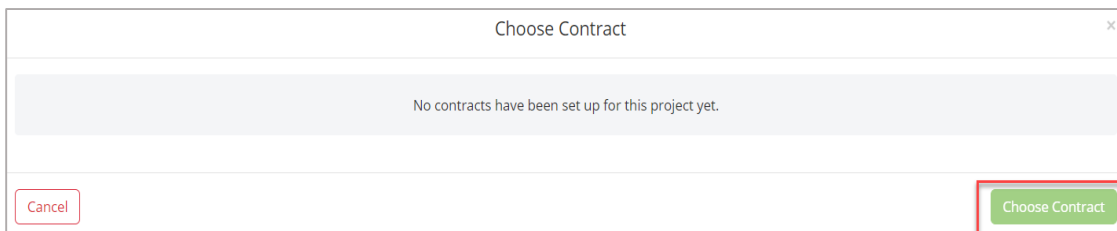
2. In the search field, begin typing **Change** and the form will appear in the forms list. Click the **Potential Change Order** to open.



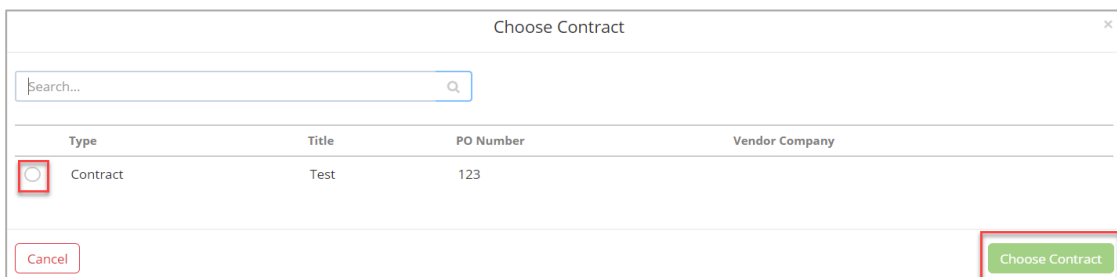
3. If this is the first potential change order for a project, click the **New Potential Change Order** button located in the middle of the log or click the **New** button in the upper right corner.



4. If you receive the following screen and you cannot select the **Choose Contract** button there is not an approved contract entered in the project to assign the PCO to. Please contact the DGS Project Manager for assistance.

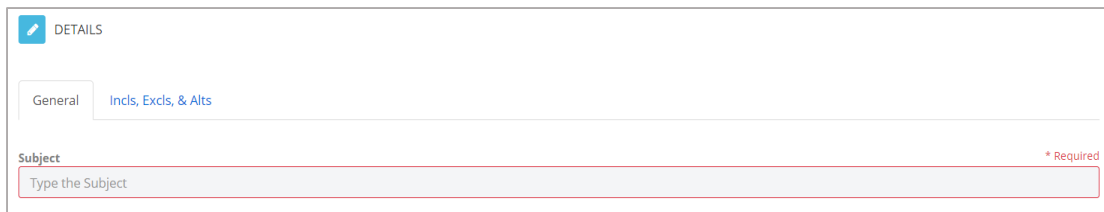


5. If there is an approved contract entered in the project, click the **checkbox beside the appropriate contract name** and click the **Choose Contract** button in the bottom right corner.



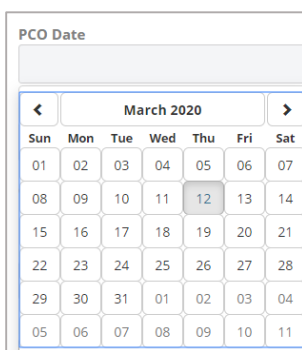
6. The **New Potential Change Order (PCO)** details window will open with a **General** Tab and the **Incls, Excls, & Alts** Tab.
7. Enter a **PCO #**. The proper numbering nomenclature should be the name of the company submitting the PCO and the next consecutive number for the PCO. For example – **DGS – 001**.

8. Enter a title for the PCO in the **Title** field. The title must include a short description of the potential change. Example: "Additional time for dewatering".



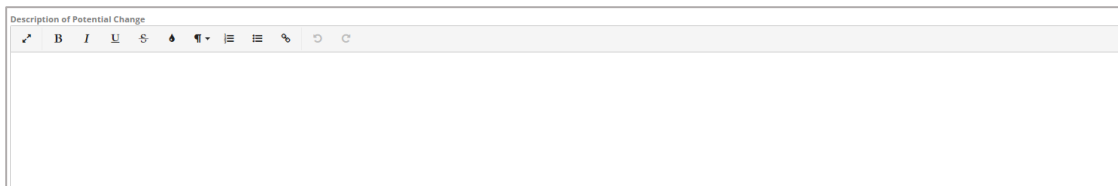
The screenshot shows a form titled "DETAILS" with a pencil icon. Below the title bar are two tabs: "General" and "Incls, Excls, & Alts". The "General" tab is active. Under the "Subject" label, there is a text input field with the placeholder text "Type the Subject". A red asterisk and the word "Required" are visible to the right of the field label.

9. Enter the creation date of the PCO in the **PCO Date** field. If the PCO is not being immediately submitted, enter the actual submission date.



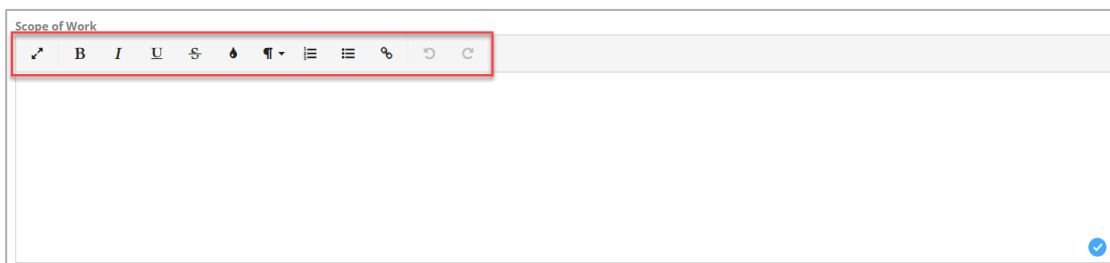
The screenshot shows a date picker for the "PCO Date" field. It displays a calendar for March 2020. The date 12 is selected, highlighted in blue. The calendar grid shows days of the week (Sun to Sat) and dates from 01 to 31.

10. Enter the **Description of the Potential Change**.



The screenshot shows a rich text editor for the "Description of Potential Change" field. The toolbar includes icons for bold (B), italic (I), underline (U), strikethrough (ABC), bulleted list, numbered list, link, unlink, and undo/redo. The text area is empty.

11. Enter a **Scope of Work**.



The screenshot shows a rich text editor for the "Scope of Work" field. The toolbar includes icons for bold (B), italic (I), underline (U), strikethrough (ABC), bulleted list, numbered list, link, unlink, and undo/redo. The text area is empty. A blue checkmark icon is visible in the bottom right corner of the editor.

12. Select the **Potential Change Reason** from the dropdown list. If you are unsure, please reach out to the DGS Project Manager.

Potential Change Reason

13. Enter a **Justification** for the Potential Change. The justification should describe why the additional work is not included in the original scope.

Justification


B I U     

14. Verify your company name is correct in the **From Business field**. Note that the business, currently displayed, carried over from the contract selected.

From Business

Micon Construction

15. Enter **Proposed Schedule Impact (Days)**. This is the requested number of additional days required to complete the work.

Proposed Schedule Impact (Days) 

16. Enter the **Requested Revised Substantial Completion Date**. This date will only need to be entered if the original substantial completion date needs to be revised to complete the change.

Requested Revised Substantial Completion Date

17. Enter the **Requested Revised Final Completion Date**, if applicable.

Requested Revised Final Completion Date

18. Enter the **Location** impacted by the potential change.

Requested Revised Substantial Completion Date

19. To add a drawing to the PCO, click the **Add Existing** button.

Drawing Reference			
			<input type="button" value="Add Existing"/> <input type="button" value="Create New"/>
Subject	Drawing #	Revision #	Revision Date

- a. Check the **box beside the drawing(s)** you wish to add to the potential change order and click the **Add** button to complete this step.

Add Drawing Reference			
Search...			
Subject	Drawing #	Revision #	Revision Date
<input checked="" type="checkbox"/> New Classroom Layout	A101	0	4/8/20
<input type="checkbox"/> Elevator Rails	000-5256	1	3/27/20
<input type="checkbox"/> Elevator Rails	000-5256	0	3/19/20
<input type="checkbox"/> Building Sections	A3	0	
<input type="checkbox"/> Exterior Elevations	A2	0	
<input type="checkbox"/> First Floor	A1	0	
<input type="checkbox"/> Occupancy and Exit Analysis	A0	0	
Cancel		Add	

20. To add a specification to the PCO, click the **Add Existing** button.

Specifications Reference			
			<input type="button" value="Add Existing"/> <input type="button" value="Create New"/>
Subject	Specification #	Revision #	Revision Date

- a. Click the **check box beside the specification(s)** and click the **Add** button.

Add Specifications Reference			
Search...			
Subject	Specification #	Revision #	Revision Date
<input type="checkbox"/> Test	00-000-0000	1	
<input type="checkbox"/> Test	00-000-0000	0	
<input checked="" type="checkbox"/> Electrical Cables	26 05 23	0	
<input checked="" type="checkbox"/> Cable Trays for Electrical Systems	26 05 36	0	
<input type="checkbox"/> Architectural Lighting Control System	26 09 33	0	
<input type="checkbox"/> Distributed Digital Lighting Control System	26 09 43	0	
<input type="checkbox"/> Integrated Controls - LED Lighting	26 09 44	0	
Cancel		Add	

21. Click inside the **Directive Reference** field and select the directive assigned if applicable.

22. In the Cost Breakdown table, click the **Create New** button to add new line items. Except for extreme or extenuating circumstances (as approved by the DGS Project Manager) create only *one line item* totalling the entire cost of the potential change.

Cost Breakdown					...
Row #	Work Description	Vendor - Proposed Cost	DGS Use Only - Acknowledged Cost		
		Subtotal \$0.00		Subtotal \$0.00	
		Total \$0.00		Total \$0.00	

- a. Enter a **Work Description**.

- b. Enter the **Vendor Proposed Cost**.

- c. After you have completed adding line items to the **Cost Breakdown** click the **"Add"** button to save the data and return to the potential change order form.

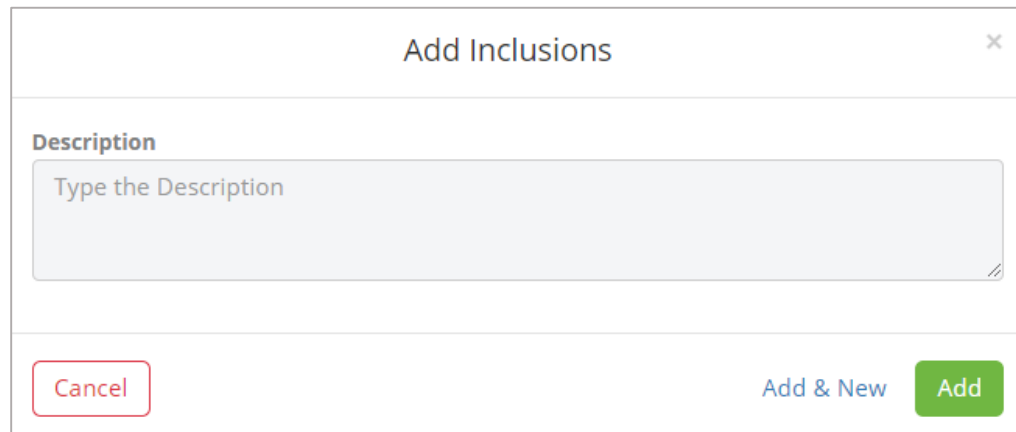
23. The next tab on the DETAILS page is **Incls, Excls, & Alts**. If applicable, the vendor may add these items.

- a. Select the **Create New** on the **Inclusions** selection.



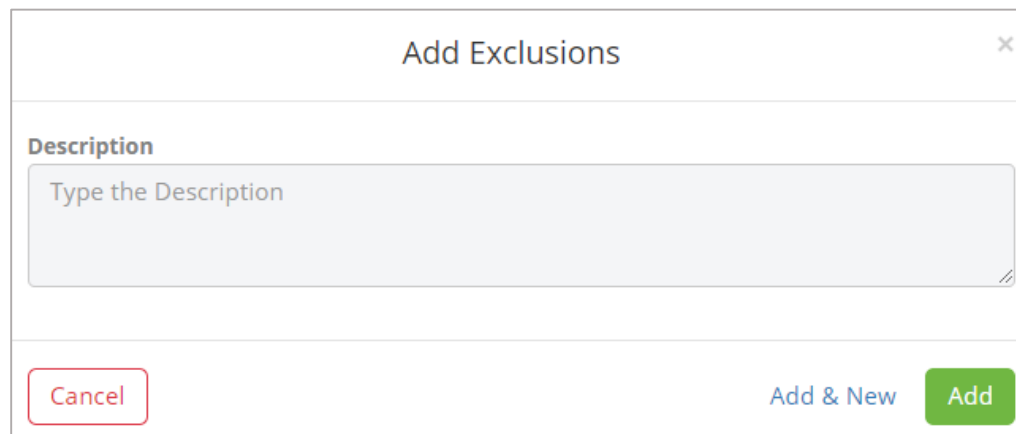
The screenshot shows a table titled "Inclusions". The table has two columns: "#" and "Description". In the top right corner of the table, there is a "Create New" button, which is highlighted with a red rectangle. There are also small icons for filtering and sorting next to the "Create New" button.

- b. Add an **Inclusions Description**. Note options to **Cancel**, **Add & New** or **Add** apply.



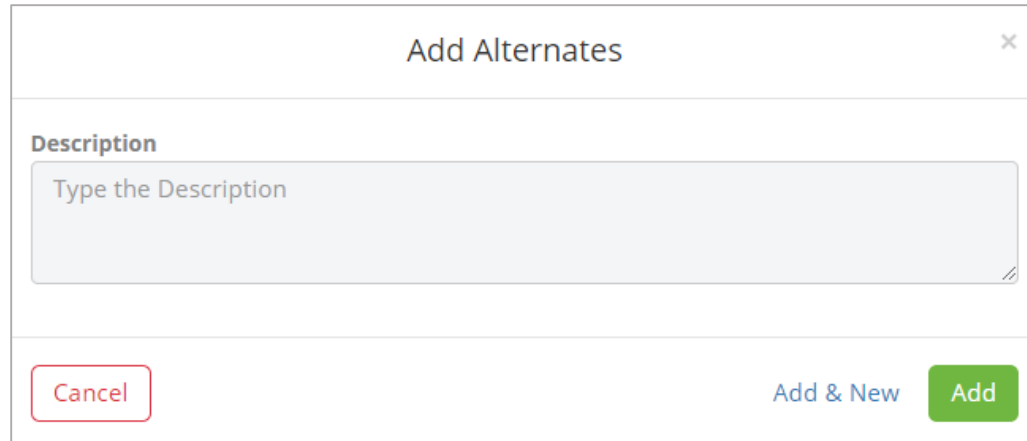
The screenshot shows a modal form titled "Add Inclusions". It has a close button (X) in the top right corner. The form contains a text input field labeled "Description" with the placeholder text "Type the Description". At the bottom of the form, there are three buttons: "Cancel" (red outline), "Add & New" (blue text), and "Add" (green background).

- c. Add an **Exclusions Description**. Note options to **Cancel**, **Add & New** or **Add** apply.



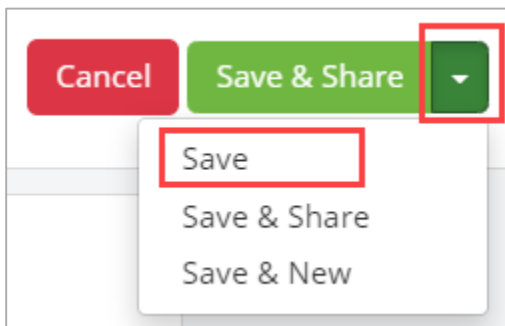
The screenshot shows a modal form titled "Add Exclusions". It has a close button (X) in the top right corner. The form contains a text input field labeled "Description" with the placeholder text "Type the Description". At the bottom of the form, there are three buttons: "Cancel" (red outline), "Add & New" (blue text), and "Add" (green background).

- d. Add an **Alternates Description**. Note options to **Cancel**, **Add & New** or **Add** apply.



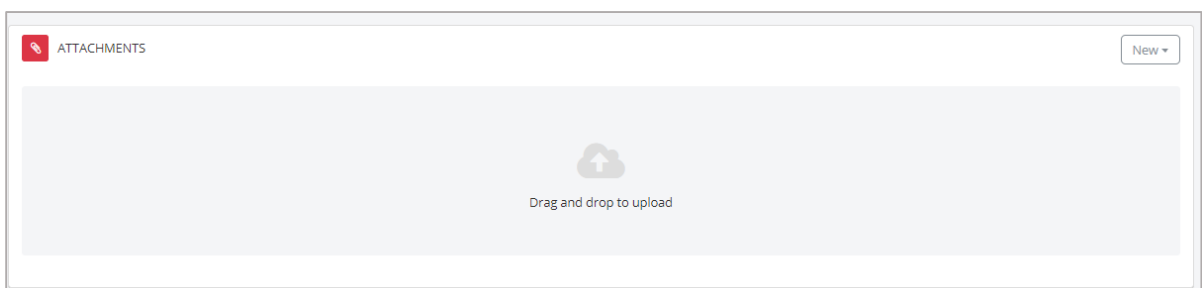
The 'Add Alternates' dialog box features a title bar with a close button (X). Below the title bar is a section labeled 'Description' containing a large text input field with the placeholder text 'Type the Description'. At the bottom of the dialog, there are three buttons: a red 'Cancel' button on the left, a blue 'Add & New' button in the center, and a green 'Add' button on the right.

24. To complete the potential change, click the **dropdown arrow** beside the **Save & Share** button and click **Save**. Note – In-progress PCO records can be saved and edited by the vendor without being submitted or visible to DGS or anyone else. A PCO is not visible to anyone until it is shared and is not submitted to DGS until the PCO Workflow is initiated.



Attaching the Potential Change Order Supporting Documentation

1. Scroll to the bottom of the document to the **Attachments** panel within the record. Drag and drop the contract documents to include at a minimum please attach a copy of the cost proposal with the cost breakdown backup.



Workflow

Vendors must initiate the PCO Workflow in order to submit the PCO to DGS for review and determination of entitlement. Failure to initiate the PCO workflow upon completion of the PCO creation will result in delays in PCO processing. PCOs created but not submitted via the PCO workflow are not considered valid PCOs.

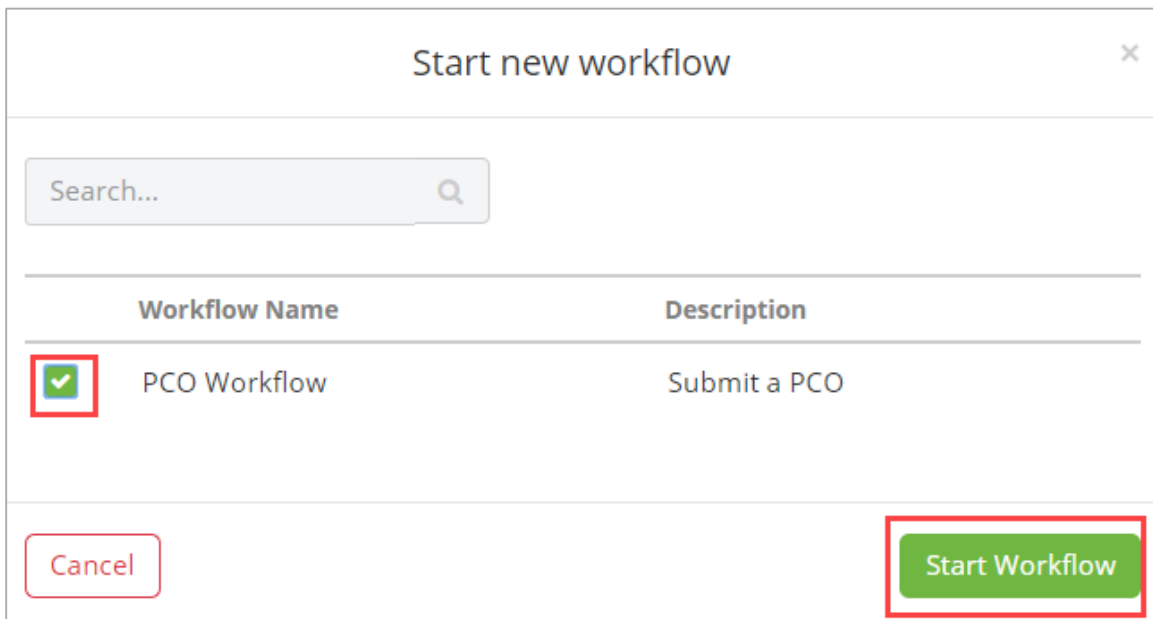
1. Scroll to the Workflow section of the form. Click the **Start New** button to begin the workflow.



WORKFLOWS

Start New

2. Click the **checkbox** beside the workflow title and click **Start Workflow**.



Start new workflow

Search...

Workflow Name	Description
<input checked="" type="checkbox"/> PCO Workflow	Submit a PCO

Cancel

Start Workflow

Editing the PCO Record

1. Open the Potential Change Order log and click the **title of the record** to open the document.

Potential Change Orders shared with me

PCO #	Title	PCO Date	Potential Change Reason	From Business	Proposed Schedule Impact (Days)	DGS Use Only - Acknowledged Cost	Status	Contract Reference	Created On	Shared
001	Add new closet in classroom	4/8/20	DGS Request	ProjectTeam, Inc.	15	\$100,000.00	Acknowledged	PO111234 - Construction Services to build new classroom at CPO training Elementary School	4/8/20 12:27 PM	35
993993	Additional Design Permit Fees	3/25/20	Administrative Change/Correction	ProjectTeam, Inc.	0	\$0.00		AXY-0034 - Design Contract	3/25/20 10:45 AM	2

2. Click the **Edit** button in the top corner of the Details section.

DETAILS

General [Incls, Excls, & Alts](#)

PCO #
001

Title
Add new closet in classroom

PCO Date
4/8/20

Description of Potential Change
Add new 4'x8' closet in SW corner of classroom

Edit

3. Make applicable changes and click the **Save & Share** button and click **Save**

Cancel Save & Share

Save
Save & Share
Save & New