# 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 Manger for review and acceptance.

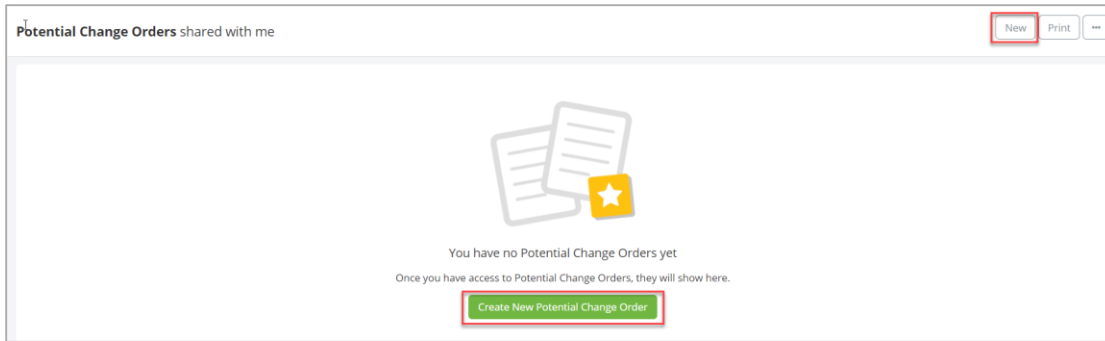**Creating a Potential Change Order**

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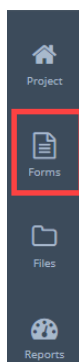
2. In the search field, begin typing **Change** and the form will appear in the forms list. Click the **Potential Change Order** to open.
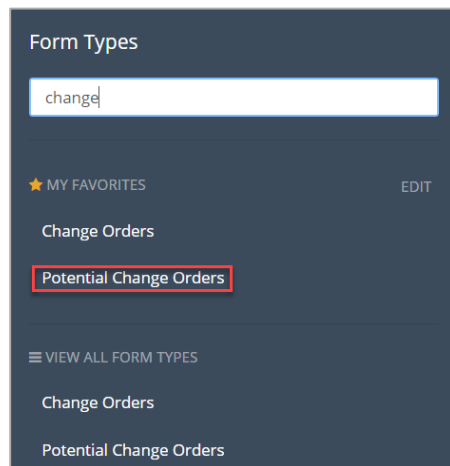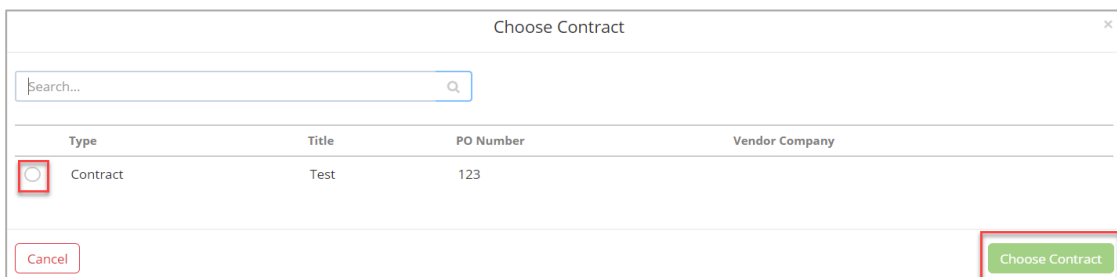

3. If this is the first potential change order for a project, click the **New Potential Change Order** button located in the middle of the log or click the **New** button in the upper right corner.

Potential Change Orders shared with me   New   Print   ...

You have no Potential Change Orders yet

Once you have access to Potential Change Orders, they will show here.

Create New Potential Change Order

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.

Choose Contract   ×

No contracts have been set up for this project yet.

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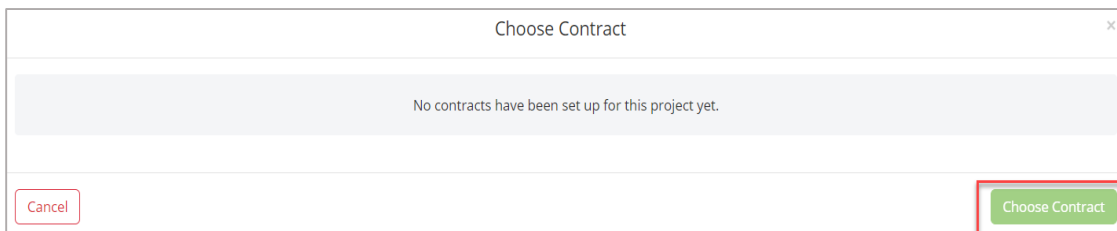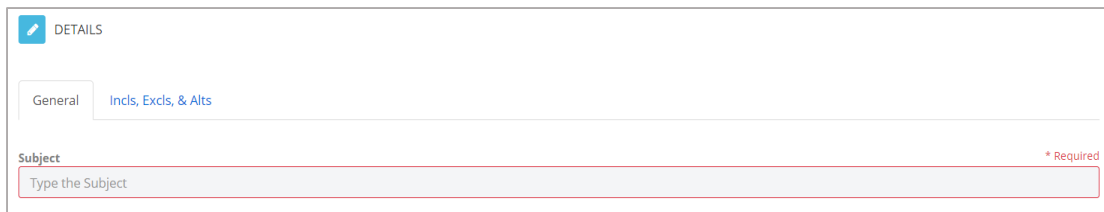
5. If there is an approved contract entered in the project, click the **checkbox beside the appropriate contract name** and click the **Choose Contract** button in the bottom right corner.

Choose Contract   ×

Search...   🔍

Type	Title	PO Number	Vendor Company
○ Contract	Test	123	

Cancel   Choose Contract
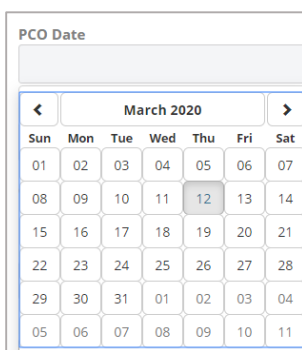
6. The **New Potential Change Order (PCO)** details window will open with a **General** Tab and the **Incls, Excls, & Alts** Tab.

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**.

PCO #

Type the PCO #

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".
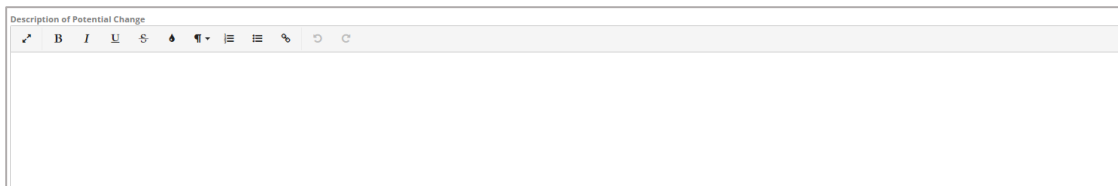

9. Enter the creation date of the PCO in the **PCO Date** field. If the PCO is not being immediately submitted, enter the actual submission date.
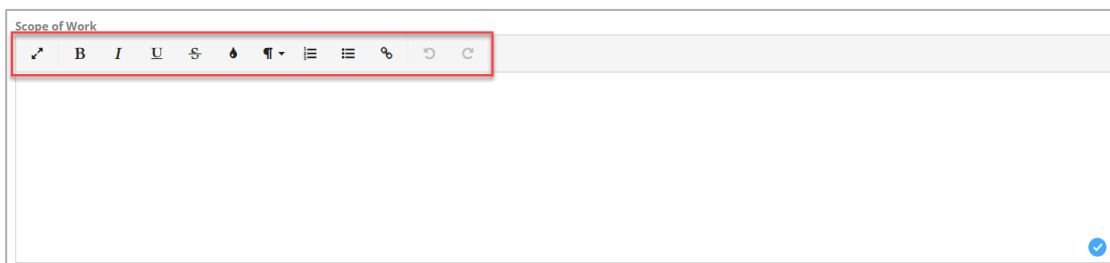

10. Enter the **Description of the Potential Change**.

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

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

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)**. The 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			⤢ Add Existing 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**
☑	New Classroom Layout	A101	0	4/8/20
☐	Elevator Rails	000-5256	1	3/27/20
☐	Elevator Rails	000-5256	0	3/19/20
☐	Building Sections	A3	0	
☐	Exterior Elevations	A2	0	
☐	First Floor	A1	0	
☐	Occupancy and Exit Analysis	A0	0	
Cancel				Add

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

Specifications Reference			⤢ Add Existing 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**
☐	Test	00-000-0000	1	
☐	Test	00-000-0000	0	
☑	Electrical Cables	26 05 23	0	
☑	Cable Trays for Electrical Systems	26 05 36	0	
☐	Architectural Lighting Control System	26 09 33	0	
☐	Distributed Digital Lighting Control System	26 09 43	0	
☐	Integrated Controls - LED Lighting	26 09 44	0	
Cancel				Add

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

Directive Reference ⑦

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			↗ Add Cost Proposals Create New ⋯
	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**.

Add Line Item

Work Description

Type the Work Description

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

Vendor - Proposed Cost

$0.00

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.

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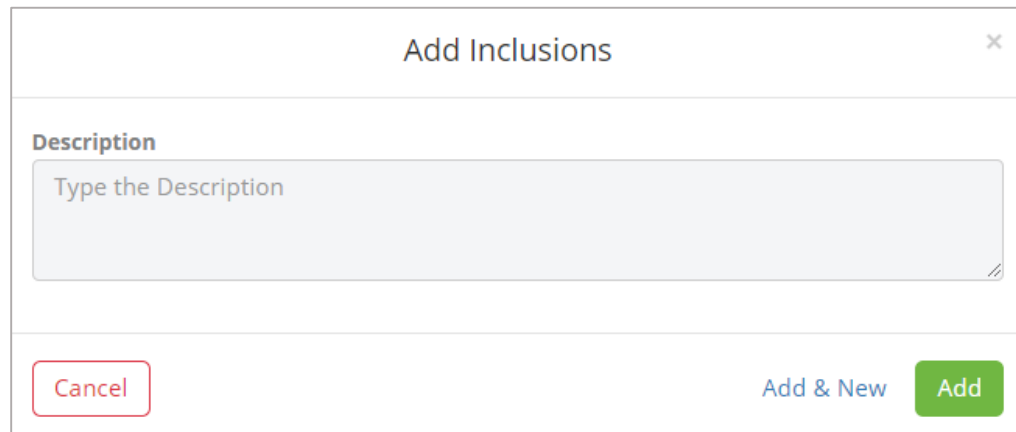
23. The next tab on the DETAILS page is **Incls, Excls, & Alts.** If applicable, the vendor may add these items.

New Potential Change Order　　　　　　　　　　　　　　　　Cancel　Save & Share ▾

✎ DETAILS

General　Incls, Excls, & Alts

a. Select the **Create New** on the **Inclusions** selection.
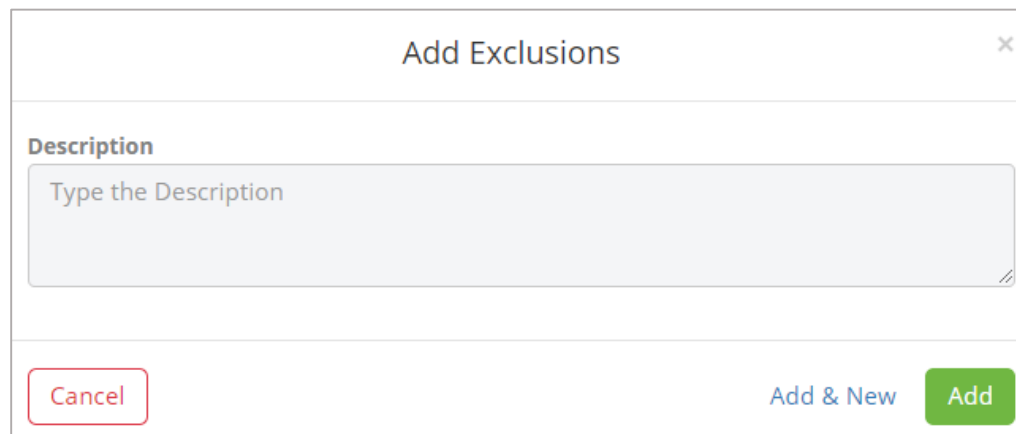
Inclusions			⤢	Create New	⋯
	#	Description			

b. Add an **Inclusions Description**. Note options to **Cancel, Add & New** or **Add** apply.
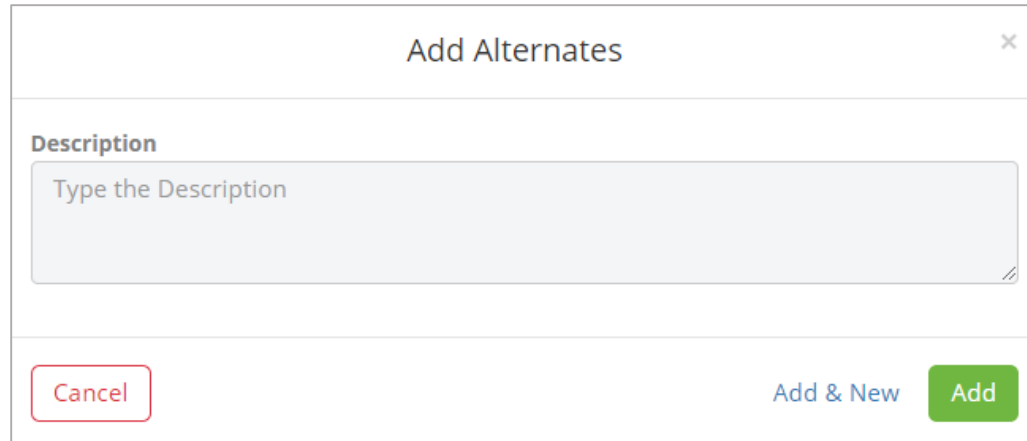
> ### Add Inclusions   ✕
>
> **Description**
>
> Type the Description
>
> Cancel   Add & New   **Add**

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

> ### Add Exclusions   ✕
>
> **Description**
>
> Type the Description
>
> Cancel   Add & New   **Add**

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

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.
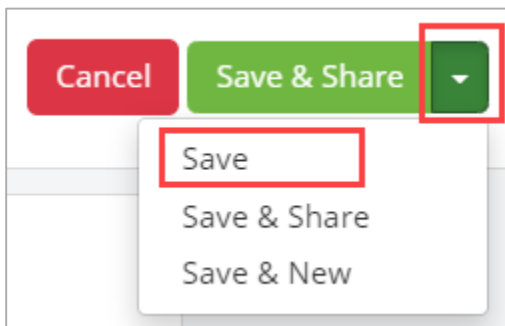
Attaching the Potential Change Order Supporting Documentation

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.
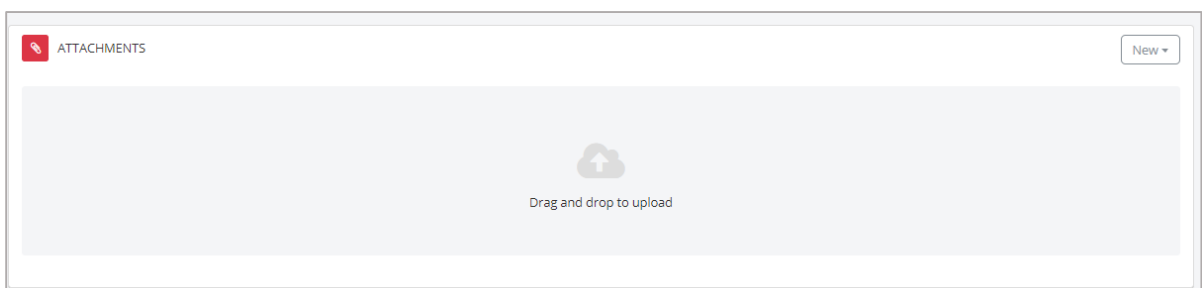
Workflow

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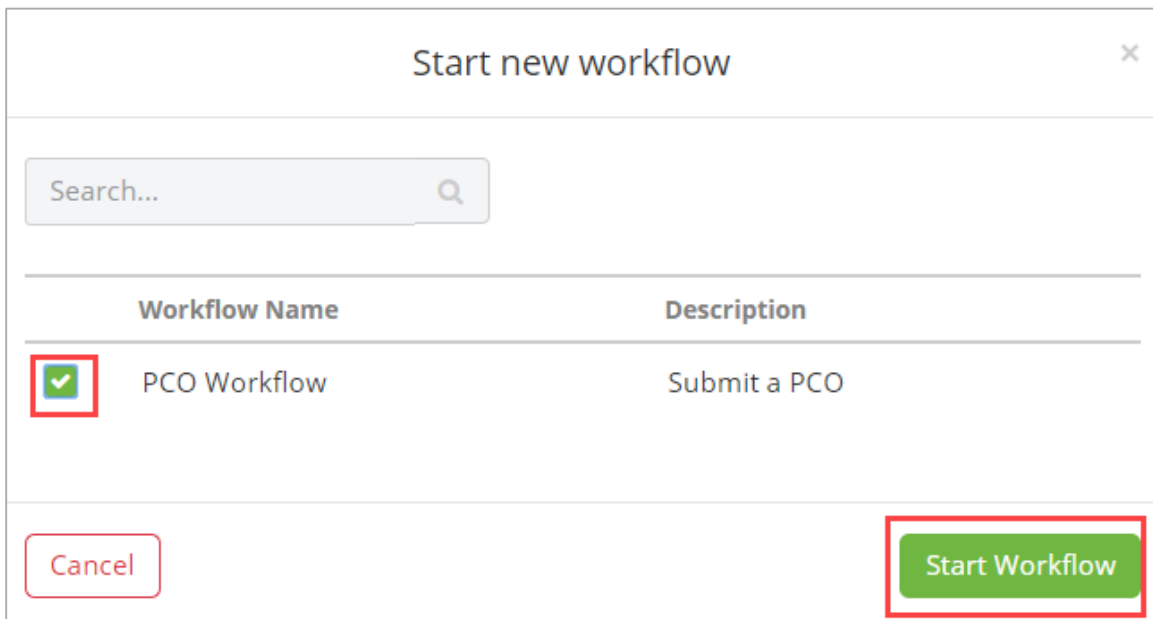
1. Scroll to the Workflow section of the form. Click the **Start New** button to begin the workflow.

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

Editing the PCO Record

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

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

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