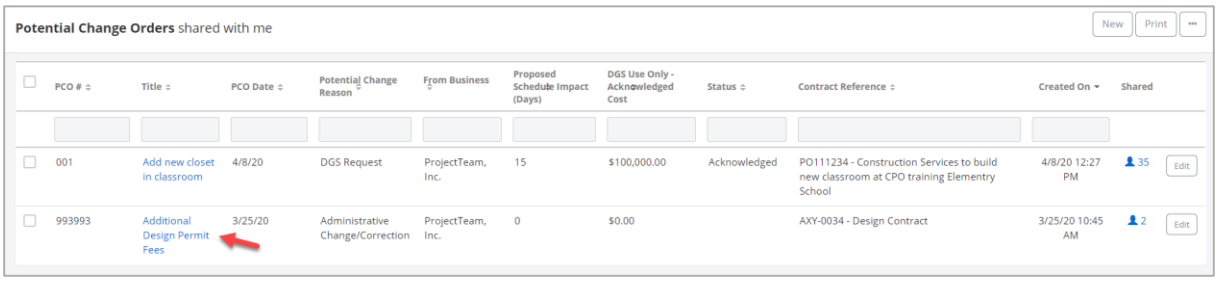
Potential Change Order – Review and Entitlement Determination

Potential change orders should be created by the vendor any time there is a potential for a change to time, cost or scope on a contract. The potential change is submitted to the DGS Project Manger for review and acceptance in ProjectTeam via a workflow initiated by the vendor. The DGS Project Manager is responsible for reviewing and taking action on all potential change orders.

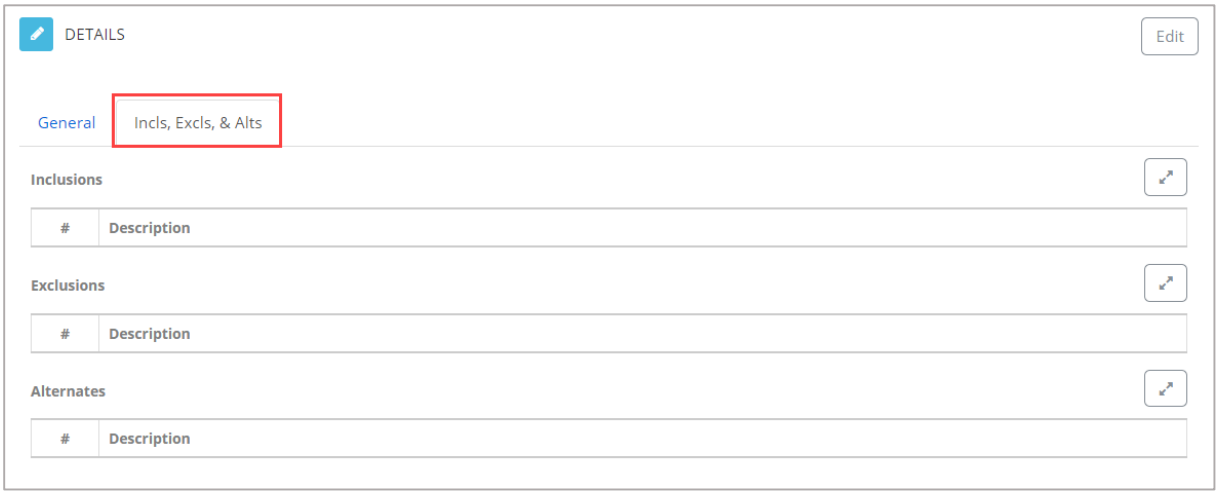
Reviewing the Potential Change Order – Completed by DGS Project Manager

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

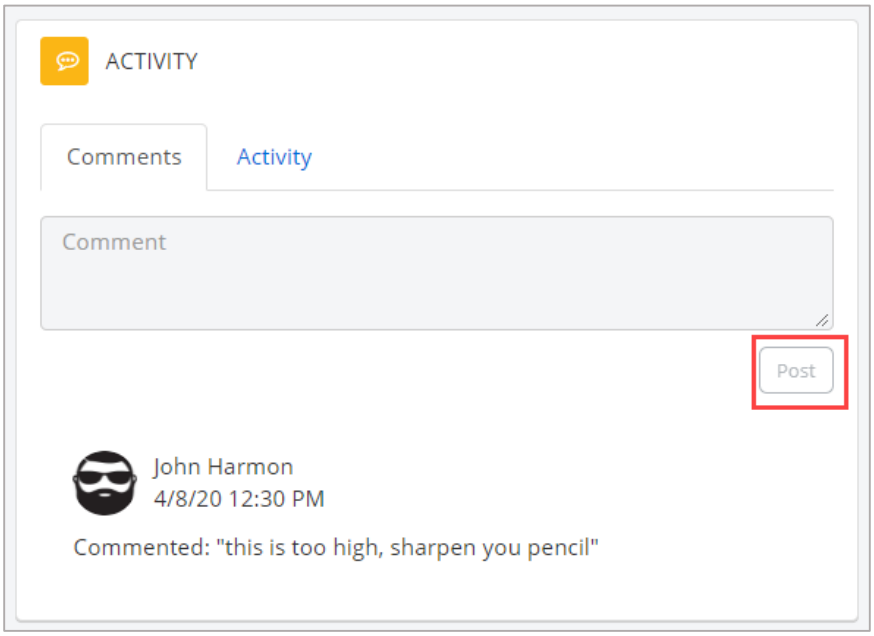


2. Review the full details of the Potential Change and also review the attached supporting documentation.

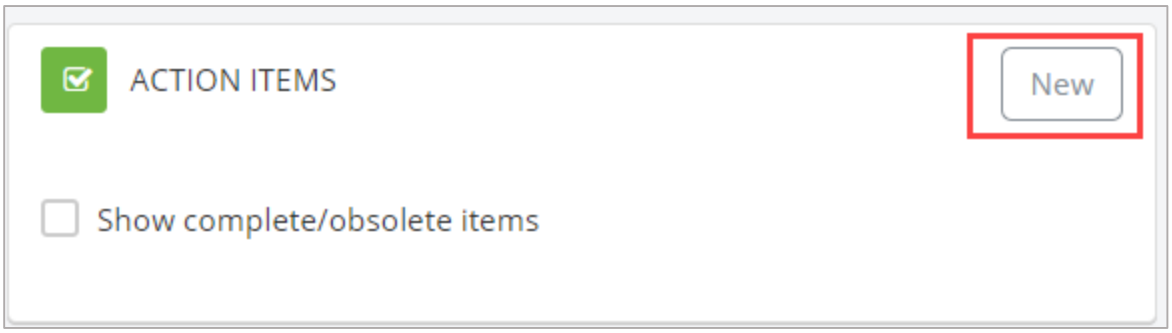
3. Be sure to review the Inclusions, Exclusions and Alternates tab.



4. The **Comments** section on the document can be used to capture any discussion with the vendor during the PCO review process.



5. Create **Action Items** from the PCO document to request additional documentation from the vendor.

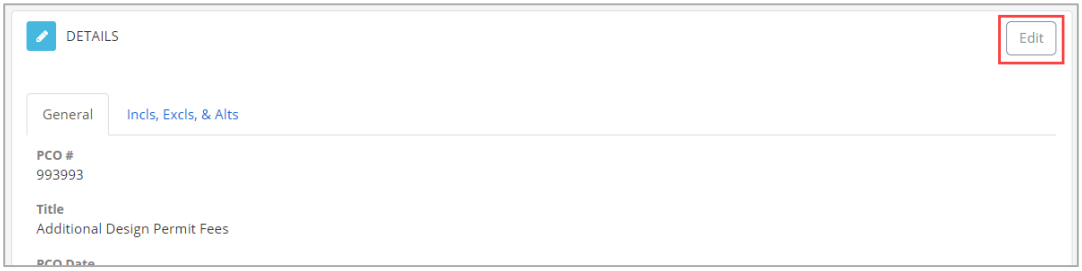


6. Relevent DGS Internal comments during the review and negotiation process should be captured in the **Internal Review Comments** field. This field and it's contents are not visable to vendors.

7. Create an IGE and record the total cost in the **IGE** field in ProjectTeam if required. (See IGE QRG for process to create the IGE document).

8. Negotiate with the vendor if necessary.

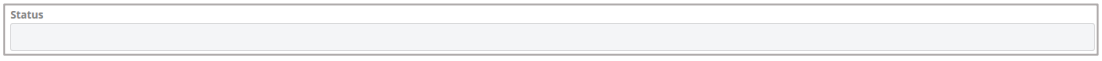
9. When review of the PCO is complete and a determination of entitlement has been made, the DGS Project Manager will need to edit the PCO to enter pertinent information. To enter PCO review comments and information, click the **Edit** button of the Details page.



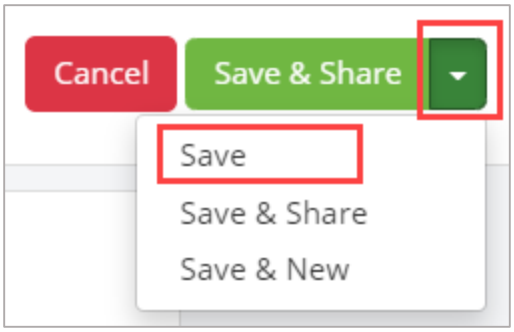
Rejecting the PCO

1. Scroll to the **DGS Determination** field and enter the word **Rejected followed by a hyphen** and the reason for the *rejection*. Ie: "REJECTED – WORK INCLUDED IN BASE CONTRACT PER DRAWING A107"

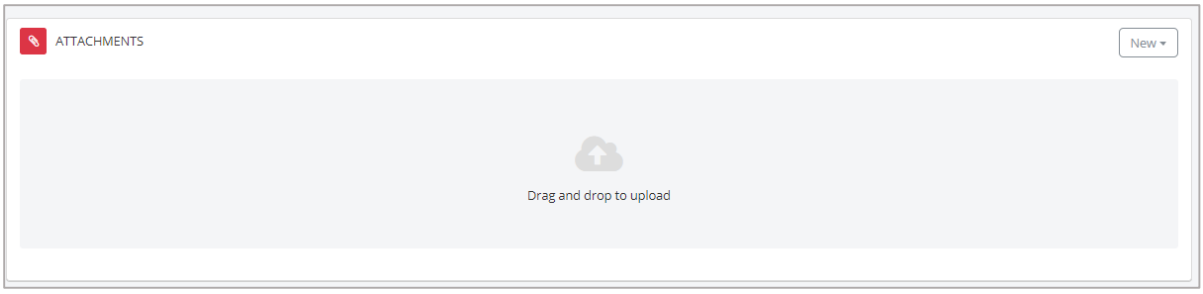
2. Change the **Status** to Rejected.



3. Click the dropdown next to the **Save & Share** button and click **Save**.

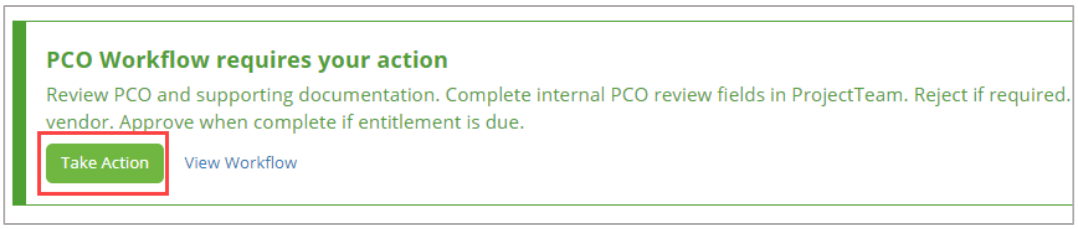


4. Attach any applicable supporting documentation in the Attachments section. Scroll to the bottom of the document to the **Attachments** panel within the record.

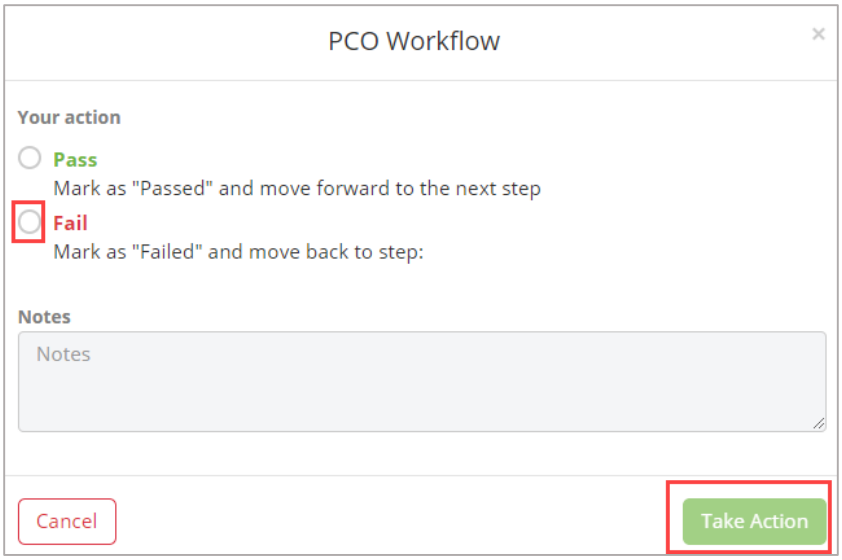


5. Reject the PCO in the workflow to complete the rejection.

    a. Click the **Take Action** button located in the top of the form.

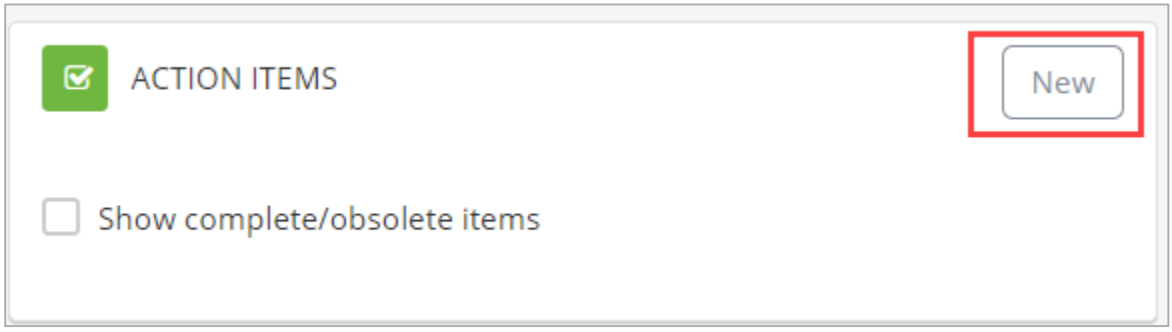


    b. Click the radio button next to **Fail,** enter your reason for rejection in the **Notes** field and then press the **Take Action** button to complete the workflow step.

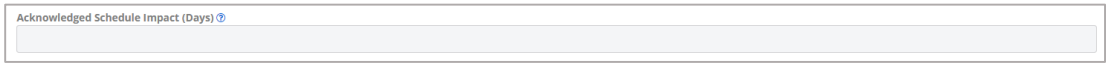


Acknowledging the PCO

1. Direct the vendor via Action Item to make any required edits to the PCO to correct any errors prior to acknowledgement. Ensure that any required edits are complete prior to acknowledging the PCO.



2. Enter any acknowledged additional time in the **Acknowledged Schedule Impact (Days)** field. Note – enter the number as calendar days.



3. Click the **dropdown arrow** beside the Cost Breakdown line item and enter the **Acknowledged Amount in the DGS Use Only – Acknowledged Cost** field for each cost line in the Cost Breakdown section. This is the amount that was negotiated with the vendor and will be issued in the Change Order from C+P.

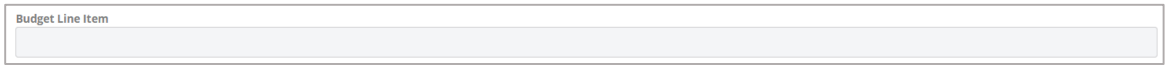
4. Enter the DGS determination regarding entitlement in the **DGS Determination** field

5. Change **Status** field to *Acknowledged.*

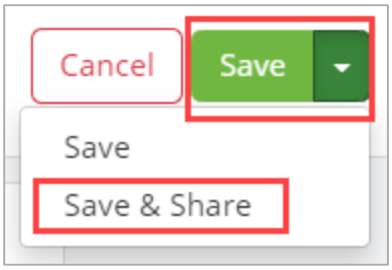
6. Select the **Funding Source** that will be used to fund the associated change order from the picklist in the Funding Source field.

7. Enter any applicable **Funding Notes** in the Funding Notes field.

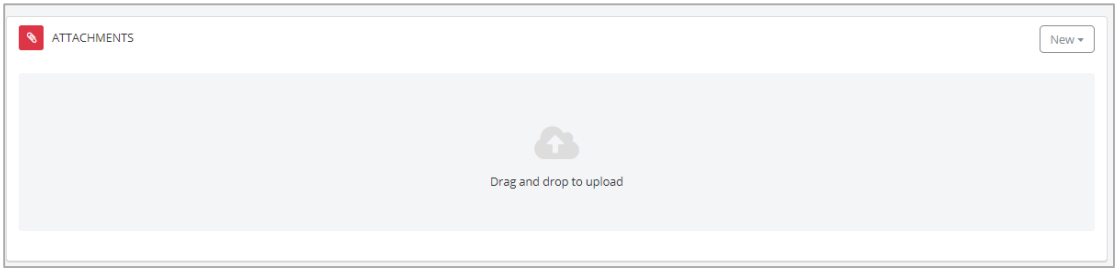
8. Select the applicable **Budget Line Item** from the picklist in the Budget Line Item field.



9. Click the dropdown next to the **Save & Share** button and click **Save & Share** to share with the **Finance**, **Budget** and **Procurement & Legal** share groups. Additional people or share groups may be added as required.

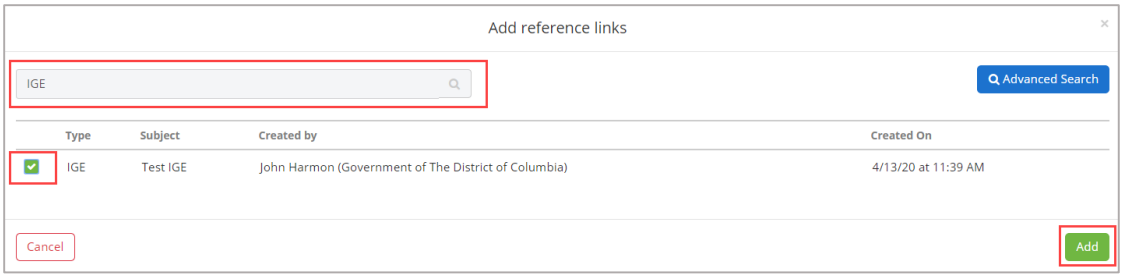


10. Attach any applicable supporting documentation in the Attachments section. Scroll to the bottom of the document to the **Attachments** panel within the record.

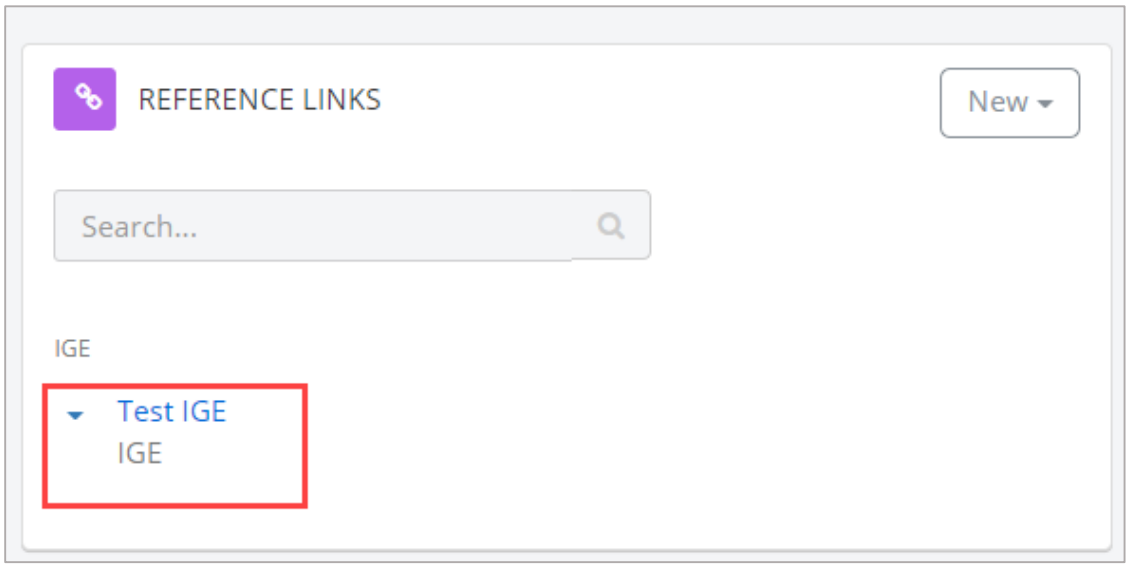


11. Reference the IGE record in the Reference section. It is important to use this step for referencing the IGE rather than attaching the document through Attachments as this will allow DGS users to see the IGE but will prevent vendors from seeing the IGE as vendors do not have access to IGEs entered in the IGE form and will not see the reference. Attachments are visible to anyone with access to the record.

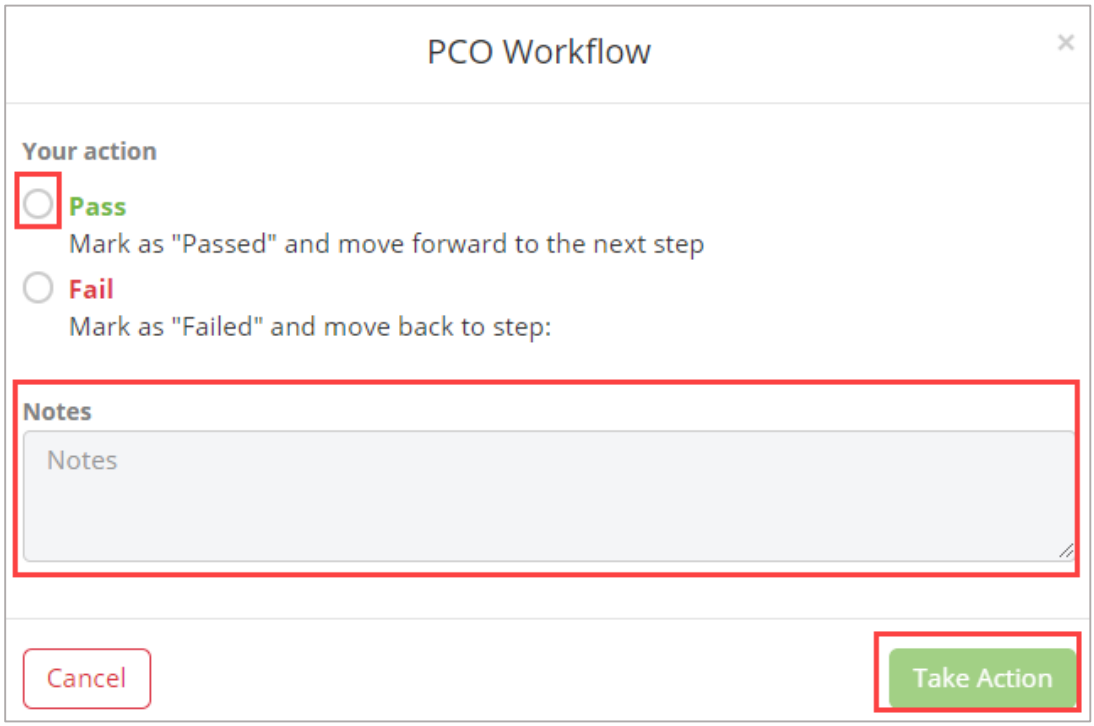
Enter IGE in the **search box**, check the **check box beside the title** of the IGE document to add as the reference and click the Add button.



The IGE selected will appear in the Reference section.



12. Take action to **PASS** the workflow. Enter the reason for entitlement in **Notes** field on workflow step.



13. Use the PCO record and supporting documentation to request a Change Order from C+P through the C+P Procurement Request process.