

CONTRACTS CHANGE ORDER PROCEDURES

POLICY:

Issued: December 2019

PURPOSE:

To prepare a change order to the Binding Agreement for the supply of goods or services at an accepted, agreed, or fixed price by the University and the Vendor.

DEFINITIONS:

Capital Projects Accountant (CPA)
Project Manager (PM)
Construction Management System (PMWEB)
Project Coordinator (PC)

POLICY GUIDELINES:

1. PM submits a PCO Reason and Terms Form, proposal and supporting documentation to PC for processing in PMWEB.
2. PC for the assigned PM enters PCO into PMWEB. PC notifies CPA of the online change request in PMWEB via an email or a PMWEB notification
3. CPA will generate a change order in PMWEB, save a draft copy to the Projects/Cost Management/Contracts folder.
4. CPA will scan the proposal and save to the Projects/Cost Management/Contracts folder.
5. CPA will combine the supporting documentation of the change order and proposal and submit in PMWEB for approvals.
6. The PM approves the change order, or returns to the CPA for corrections.
7. Once approved, the CPA emails the change order to vendor for signature.
8. Vendor has 7 days to sign and return change order. After 7 days the CPA will call or email vendor on status of signature approval.
9. Once the signed change order is received from the vendor, the CPA will submit in PMWEB for approvals and enter the change order into the AIS system. ADCPA will approve the change order in AIS and PMWEB.
10. When Change Order is fully executed;
 - a. CPA will scan fully executed Change Order documents and email to the vendor.
 - b. The fully executed change order will be saved in Projects/Cost Management/Contracts folder.
 - c. The AIS change order number is added to the Contract template in the PMWEB.
 - d. The original documents are saved to the project file.
11. Changes to non-contract purchase orders are completed through the AIS system and entered into the PMWEB. However, a hard copy is not sent to the vendor for signature.