



Change Order User Guide – under 25k PO Responsible

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About

A Change Order adds positive or negative cost items to Expense Contracts and/or extend time. In Hard Bid Change Orders, there are no amendments or authorizations that are needed for Requirements.

Notes

The Change Order process can be initiated by either the PO (Contractor proposals under \$25K) or the COU Lead Estimator (Contractor proposals greater than \$25K). This guide provides step-by-step instructions for when the PO is responsible.

Please see the separate guide for when the COU Lead Estimator is responsible. If the Change Order is the result of a TCR, the Change Order will use the COU Lead Estimator steps.

Process Overview

First, the PO creates and submits the Change Order, which is DocuSign approved by the GC and the SPO. Next, the COU Admin assigns a package approver, who will review the package and PIN sign the Change Order. The Change Order is sent to Finance to be encumbered, which allows the Change Order to be used for Pay Requests.

There are a few requirements and processes to complete before submitting a Change Order.

REQUIRED

Upload Confidential Information in Issues App

All confidential documents, cost amounts and dates must be entered in the **Issues App only**. If you enter them in any other app, they might be visible to the Contractor.

Filename Format

Bldg #-Contract # ("C" + last 5 digits)-[Type]-Change Issue # ("CI" + last 5 digits) EXAMPLES:

BLDG#-CXXXXX-FRE-CIXXXXX

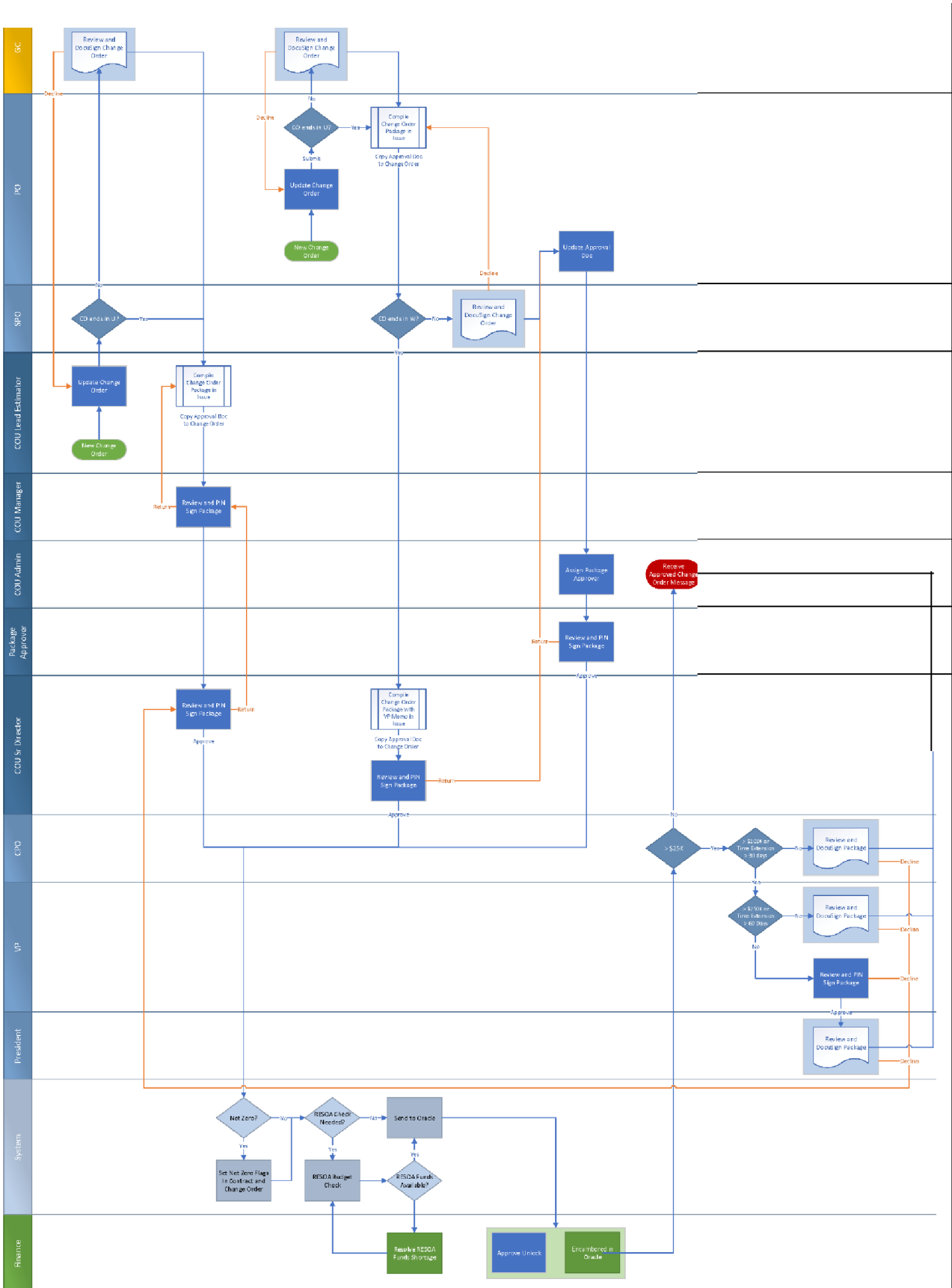
BLDG#-CXXXXX-PCO-CIXXXXX

BLDG#-CXXXXX-CO-CIXXXXX

EX: K155-C80266-CO-CI00025.

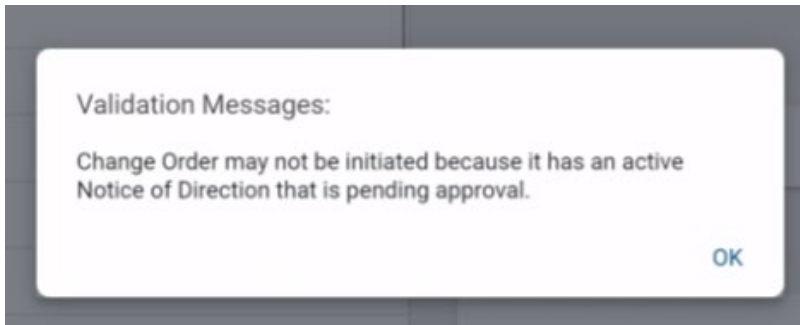
Approval Doc Filename: Building ID-Contract #-CO Package-CIXXXXX

Workflow Diagram



Step-by-Step Instructions

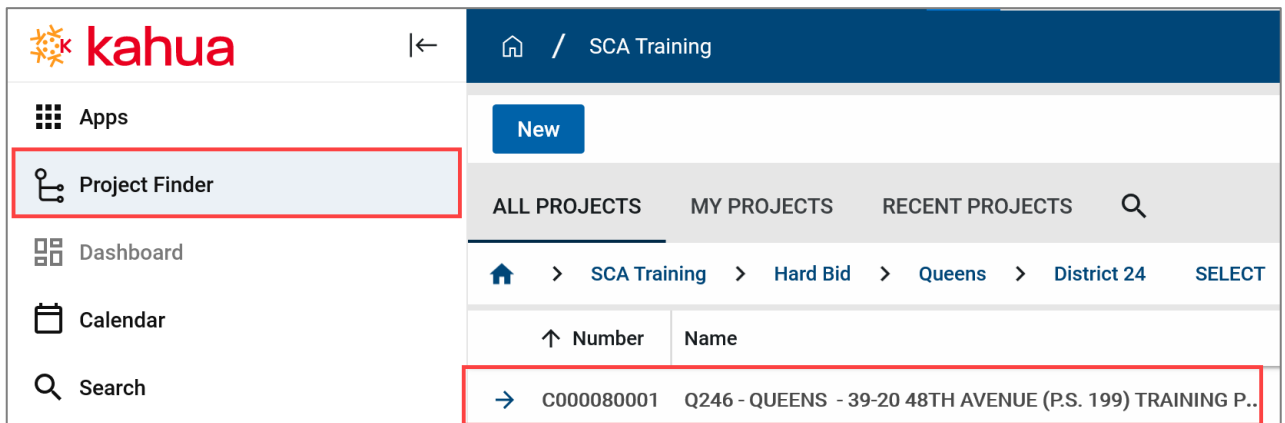
Before you get started, make sure all NODs are approved for the project, or you will get an error message:



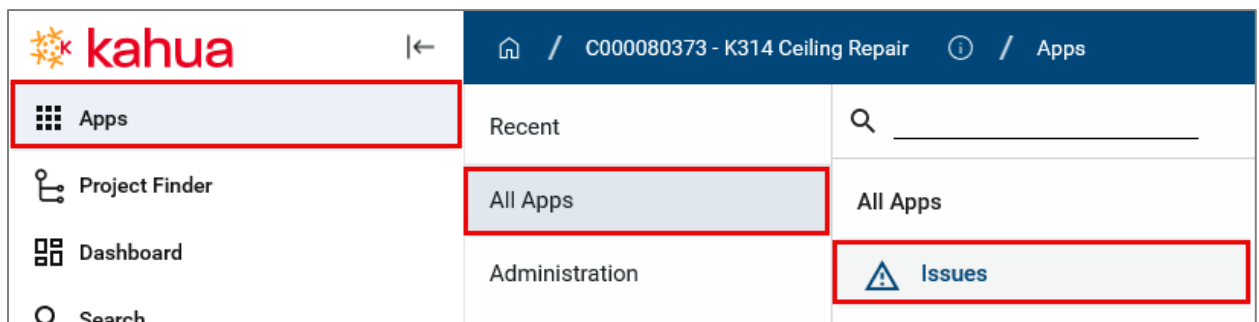
PO Initiates the Change Order

All potential cost and attachments must be entered in the Change Issue (Issues App) previously initiated during the creation of an RFI, etc. PO Enters PCO on GC's behalf and then FRE (Negotiation) and Change Order amount as agreed with GC.

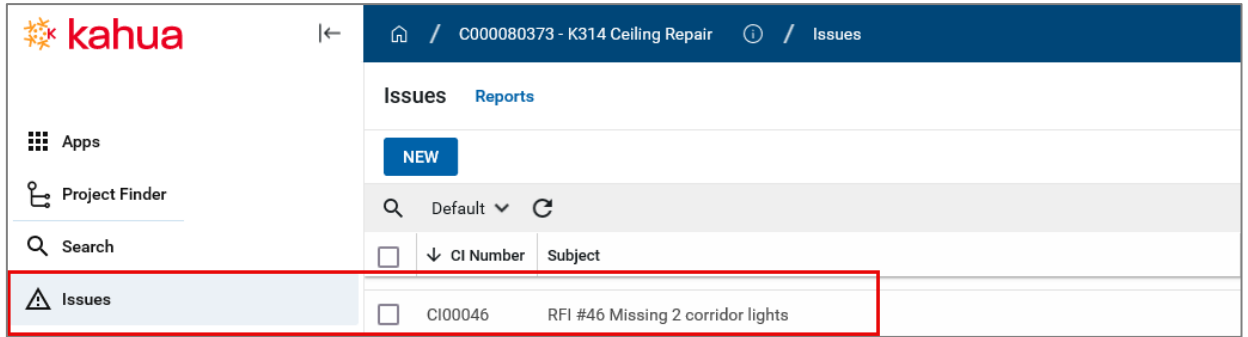
1. Go to **Project Finder** and select the desired project.



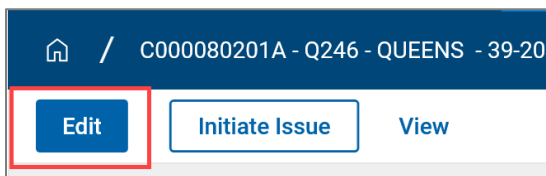
2. Click **Apps > All Apps > Issues**



1. Select the **Change Issue**.



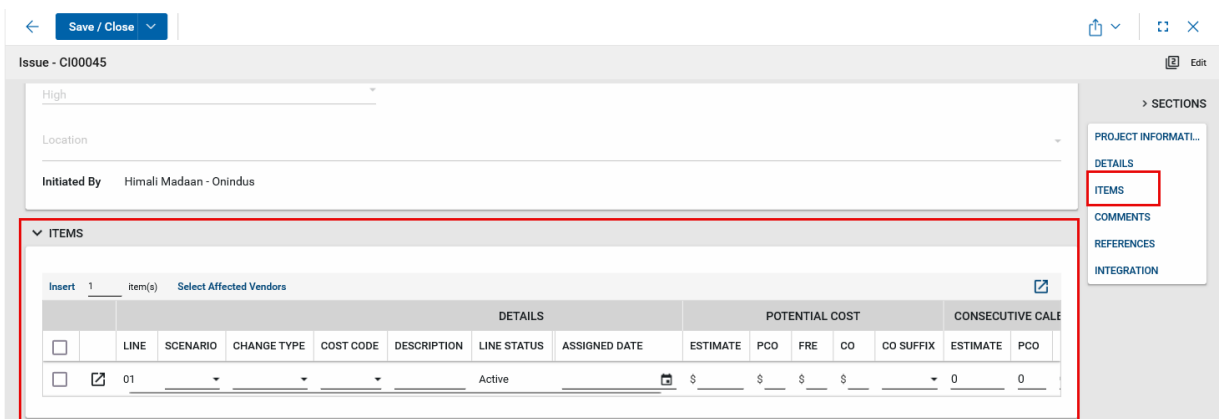
2. Click **Edit** at the top of the record



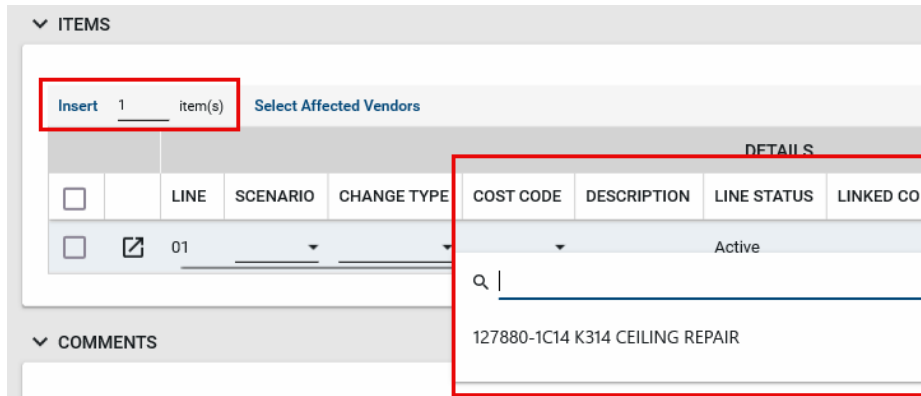
3. Navigate to the References section at the bottom and make sure the eSigned NOD is present



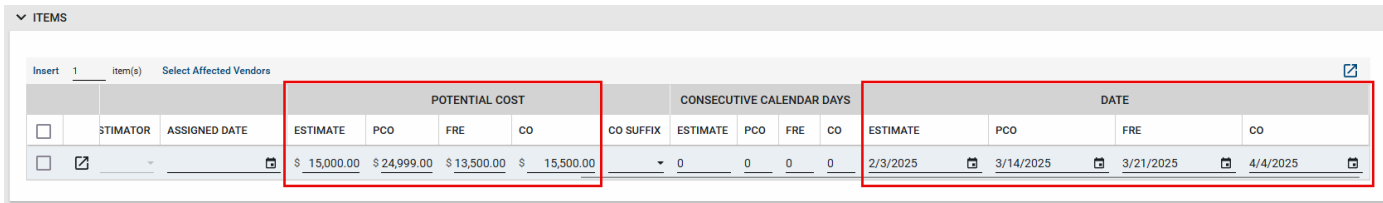
4. Navigate to the **Items section** (Scroll or use the navigation pane to the right)



- COST CODE:** Select the **Cost Code** (for the LLW) from the drop-down menu. Click **Insert** to add additional lines / Cost Codes (LLWs) if applicable.



- Potential Cost:** Enter **FRE Amount** and **PCO** amount on the GCs behalf, and the final **CO** amount
- Enter **Dates** under **PCO** and **FRE**. (Estimate field is manually populated by PO / AEoR).



Dates Explanation (NOTE: These dates are the same as how they are done in CM-13.)

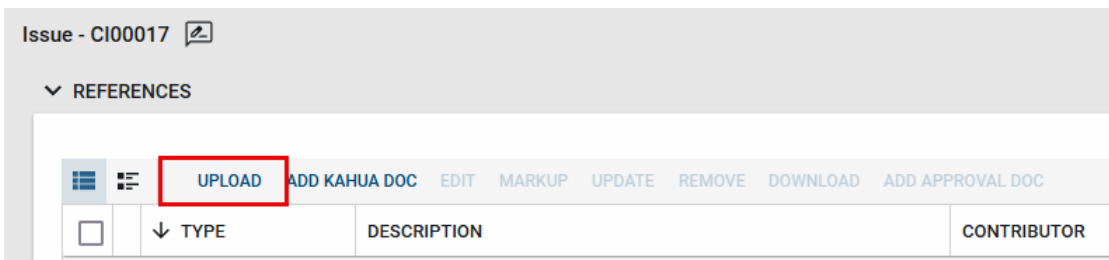
Estimate: References the date when the bulletin was approved by AEoR.

PCO - Date when the GC submitted the PCO

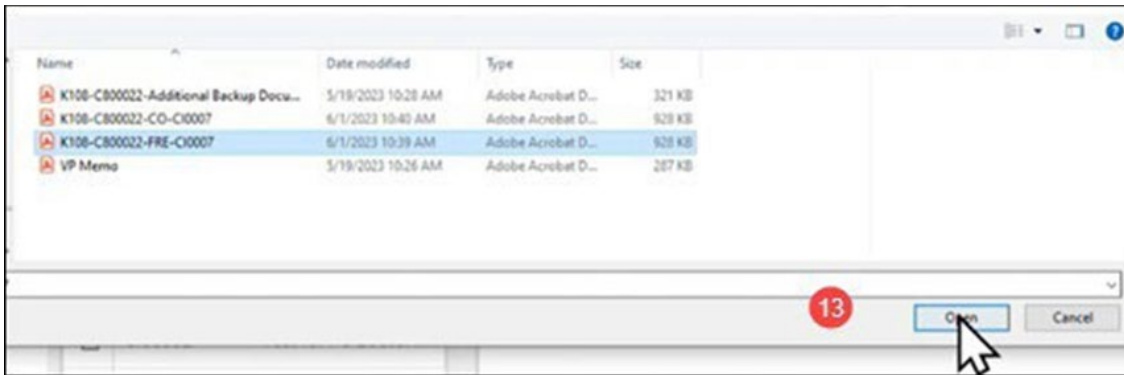
FRE - Date when FRE was sent to the GC

CO - Date when GC and PO agree on the change order amount (Usually the GC signs the PO FRE and provide email acceptance.)

- References** section: Click **Upload**



- Select the **FRE**, **PCO**, and **GC email / signed acceptance of final CO amount** > Click **Open**



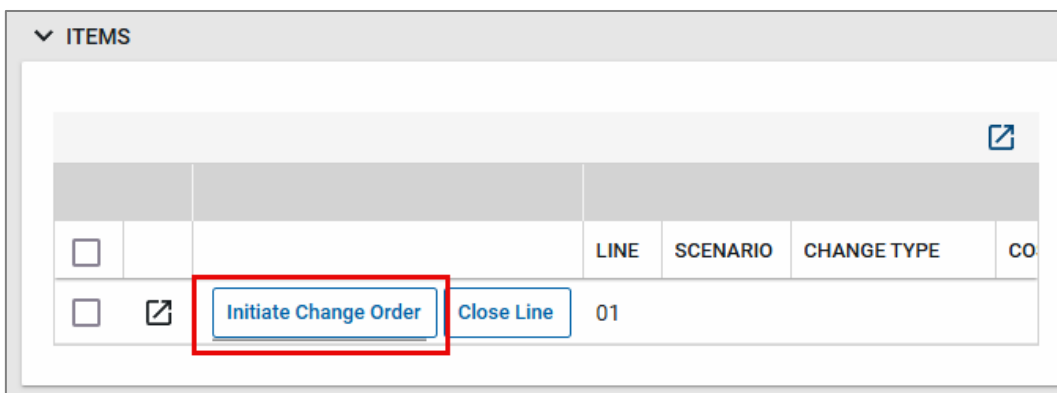
You will see checkmarks next to the documents you uploaded to the References Section

<input type="checkbox"/>	Supporting Document	NODwithRFP.00005.en.en.eSigned.pdf	
<input type="checkbox"/>	Supporting Document	X181-C800011-CO-CI00021.pdf	✓
<input type="checkbox"/>	Supporting Document	X181-C800011-FRE-CI00021.pdf	✓
<input type="checkbox"/>	Supporting Document	X181-C800011-PCO-CI00021.pdf	✓

10. Click **Save / Close** at the top of the record



11. Click **Initiate Change Order**.



12. Click **Start Processing** (No need to do anything else in this window).

Process

Select target partition and document type:

Source Permits

Target Application
Issues

Select copies to include in references:

PDF of Initiating document (current state) on the Destination document

PDF of Destination document (current state) on the Initiating document

Select references to include:

Type	Description	Reference Type

Start Processing Cancel

13. The System will redirect to the Expense app> Change Orders tab. Navigate to the Scope section. Scope of Work as required. You must use this language, which should already be present from the NOD

Please provide all labor, materials, and equipment necessary to perform the work detailed in the response to RFI #CI000xx issues on [Date].

▼ SCOPE

Time Estimate (Consecutive Calendar Days)
0

Scope of Work
Please provide all labor, materials, and equipment necessary to perform the work detailed in the response to RFI #CI00070 issued on 3/7/2025

NOTE: In **Time Estimate**, the PO should enter the appropriate number of days **only** in instances of Change Orders with a **TCR**. (The field should remain blank for most Change Orders.) TCR to be done by COU/Scheduler.

14. Click **Save / Close** at the top of the record
15. Click **Submit for Signature** at the top of the record

Edit **Submit for Signature**

GC DocuSigns the Change Order

The Change Order will be sent to the GC's work email for DocuSign. See [DocuSign Instructions](#) for more information.

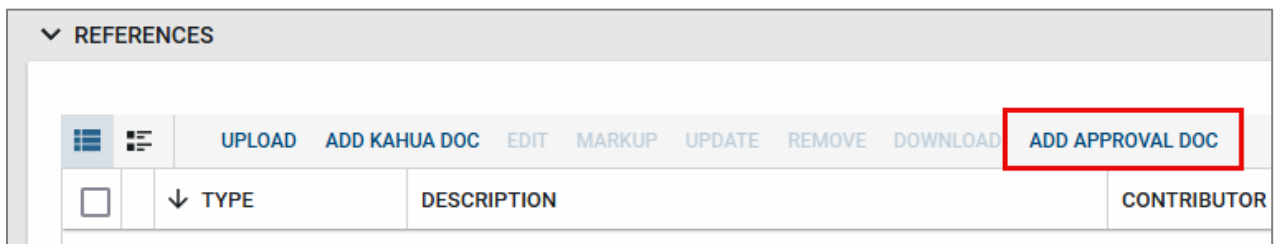
PO Compiles a Change Order Package

PO creates a CO Package for the SPO to approve. Complete the following steps before submitting.

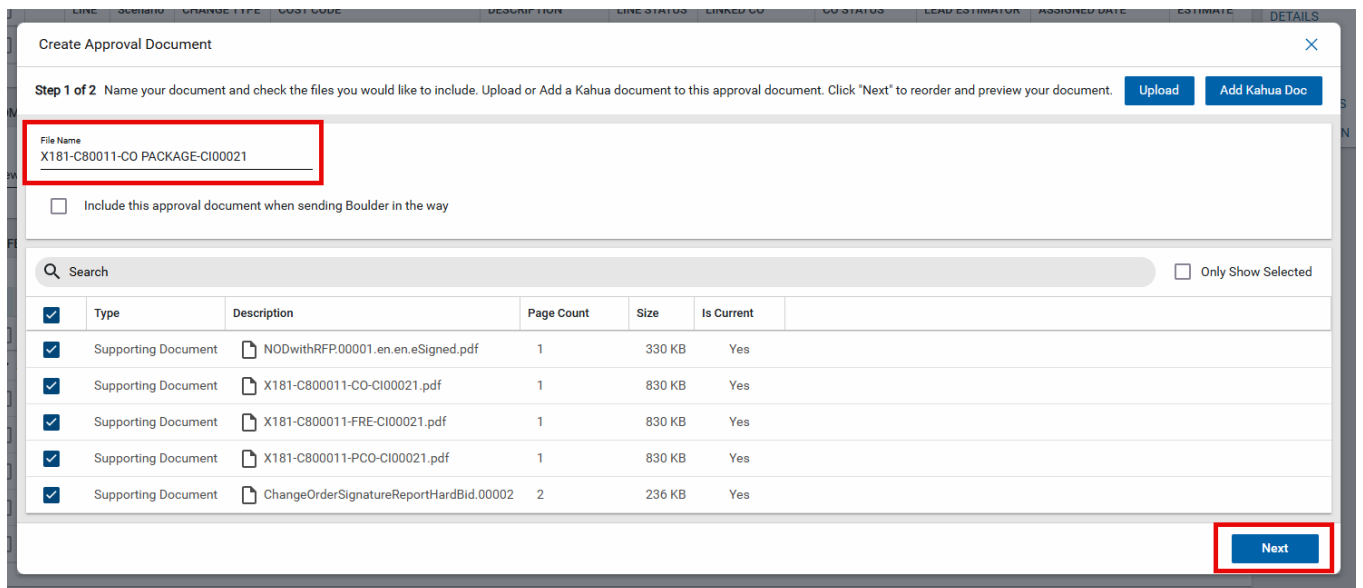
1. Go to Issues app > Select the Issue
2. Click **Edit**



1. In References, click **Add Approval Doc.**



2. Step 1: Enter **Approval Doc Filename. Building ID-Contract #-CO Package-CIXXXX**
 - a. Check the boxes next to each document you wish to include in the Approval Document (CO Package)
 - b. Click **NEXT** at the bottom right of the window



3. Step 2: In the 2nd window, use the buttons (Figure 1) to move your documents into the following order (Figure 2).

TIP: Select the “ChangeOrderSignatureReportHardBid.00002.en.en” document and click **Move to Top**.

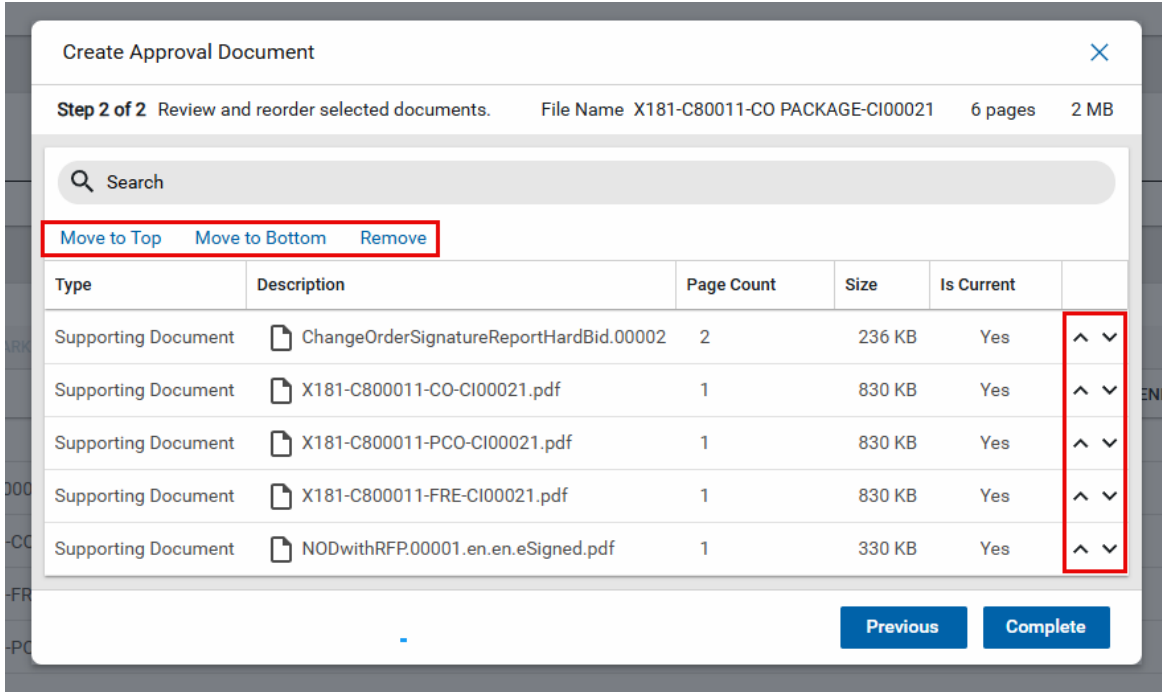


Figure 1

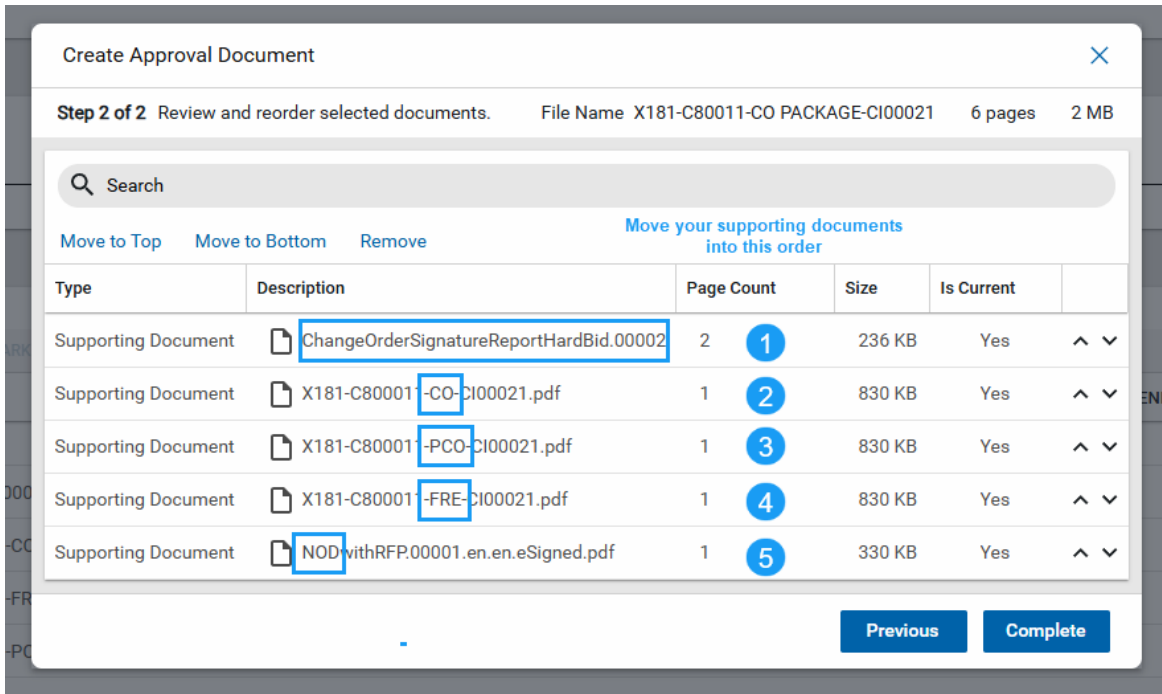


Figure 2

CO Package Documentation Order:

- a. Signed CO (DocuSign/eSigned Initial Package to SPO will have the Contractor signature.
- b. CO – this is the GC acceptance email / document agreement that includes the final CO amount
- c. PCO
- d. FRE
- e. NOD
- f. Supporting Documentation (Estimate, etc.)

4. Click **Complete** at the bottom right when finished

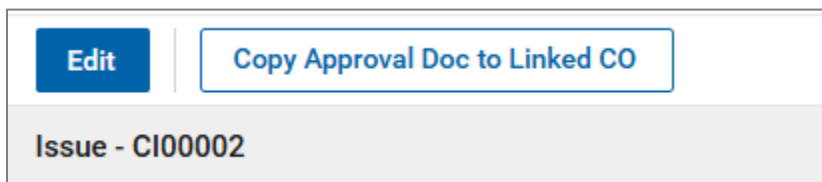


5. Click **Save/Close** at the top of the record. Notice that a new **Approval Document** section is created at the bottom of References:

<input type="checkbox"/>	Supporting Document	X181-C800011-PCO-CI00021.pdf	Evelyn Carrigan	4/15/2024 4:24:06 PM EDT	830 KB	No	Yes	Yes
<input type="checkbox"/>	Supporting Document	ChangeOrderSignatureReportHardBid.00002.en.en.eSigned.pdf	Jack SCA PO J	11/22/2024 12:00:07 PM EST	236 KB	No	Yes	Yes
<input checked="" type="checkbox"/>	Approval Document							
<input type="checkbox"/>	Approval Document	X181-C80011-CO PACKAGE-CI00021.pdf		4/15/2025 3:16:14 PM EDT		No	No	No

6. **WAIT FOR IT TO RENDER!** Scroll to the right to view the Render Status

7. Click **Copy Approval Doc to Linked CO** at the bottom



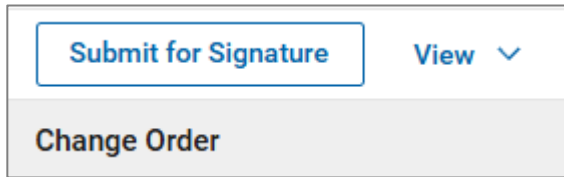
8. Open the **Expenses App**> **Change Orders**.

9. Select the **Change Order**

The screenshot shows a software interface with a 'Change Orders' dropdown menu highlighted in red. Below it are buttons for 'NEW(COU Lead Estimator)', 'NEW(CM Firm)', 'NEW(PO)', and 'Export'. A search bar contains 'Default'. A table below lists change orders, with one row highlighted in red:

<input type="checkbox"/>	<input type="checkbox"/>	Contract	Change Order Number	CI Nu
<input type="checkbox"/>	<input type="checkbox"/>	T80019 - II Construction - X181 TRAINING PROJECT #19 - SCHOOL RENOVATION	00002	CI000

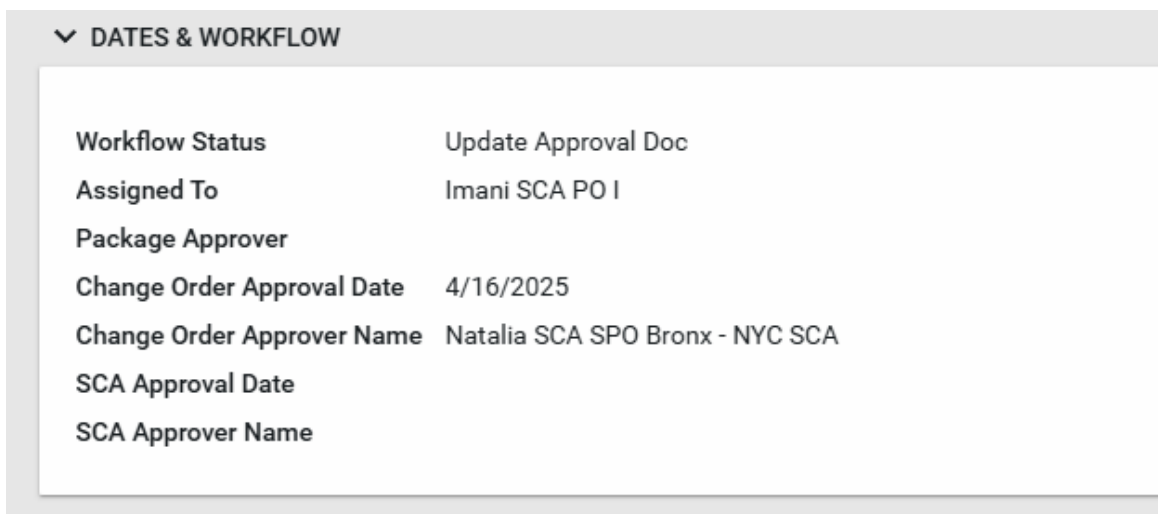
10. Click **Submit for Signature**



SPO DocuSigns

SPOs will receive a DocuSign Signature Task for the Change Order within their nycsca.org email address.

PO Edits Approval Document & Submits to COU Administrator



The signed Change Order (...**eSigned.pdf**) is generated by the system. This **new** document will include the Change Order with GC & SPO signatures, and all the backup documents you attached in the Approval Document – *all in one PDF*.

First, make sure the system-generated document has everything you need to send to the COU:

- A. Click **Edit** at the top of the record
- B. Go to the **Issues** app> **References**
- C. In the **Supporting Document section**, select CO PACKAGE eSigned PDF document (usually at the bottom of the list)
- D. Click **View** in the header to review all pages. Be sure that there are no duplicate documents included in the package and that they are *in the correct order*.

TIP: Notice this eSigned document is a large file - the same size as the original approval document we created at the top of the list – 3MB. This is a quick way to find the signed document to view.

REFERENCES

VIEW MARKUP DOWNLOAD

<input type="checkbox"/>	TYPE	DESCRIPTION	CONTRIBUTOR	DATE	SIZE
Supporting Document					
<input type="checkbox"/>	Supporting Document	NODwithRFP.00006.en.en.eSigned.pdf	Noor SCA PO N	3/13/2024 4:03:46 PM EDT	326 KB
<input type="checkbox"/>	Supporting Document	X181-C800011-CO-CI00021.pdf	Evelyn Carrigan	5/17/2024 2:24:41 PM EDT	830 KB
<input type="checkbox"/>	Supporting Document	X181-C800011-FRE-CI00021.pdf	Evelyn Carrigan	5/17/2024 2:24:41 PM EDT	830 KB
<input type="checkbox"/>	Supporting Document	X181-C800011-PCO-CI00021.pdf	Evelyn Carrigan	5/17/2024 2:24:41 PM EDT	830 KB
<input type="checkbox"/>	Supporting Document	X181-C8000X-Estimate-CI000XX.pdf	Evelyn Carrigan	10/9/2024 10:53:44 AM EDT	150 KB
<input type="checkbox"/>	Supporting Document	ChangeOrderSignatureReportHardBid.00008.en.en.eSigned.pdf	Matt SCA PO D	2/3/2025 12:10:43 PM EST	239 KB
<input type="checkbox"/>	Supporting Document	X81- C800011-CO Package-CI00027.eSigned.pdf	Matt SCA PO D	2/12/2025 11:41:06 AM EST	3 MB
Approval Document					
<input type="checkbox"/>	Approval Document	X81- C800011-CO Package-CI00027.pdf	Matt SCA PO D	2/12/2025 11:45:10 AM EST	3 MB

Next, you must update the original Approval Document to include *only* this new eSigned document in the Approval Document section:

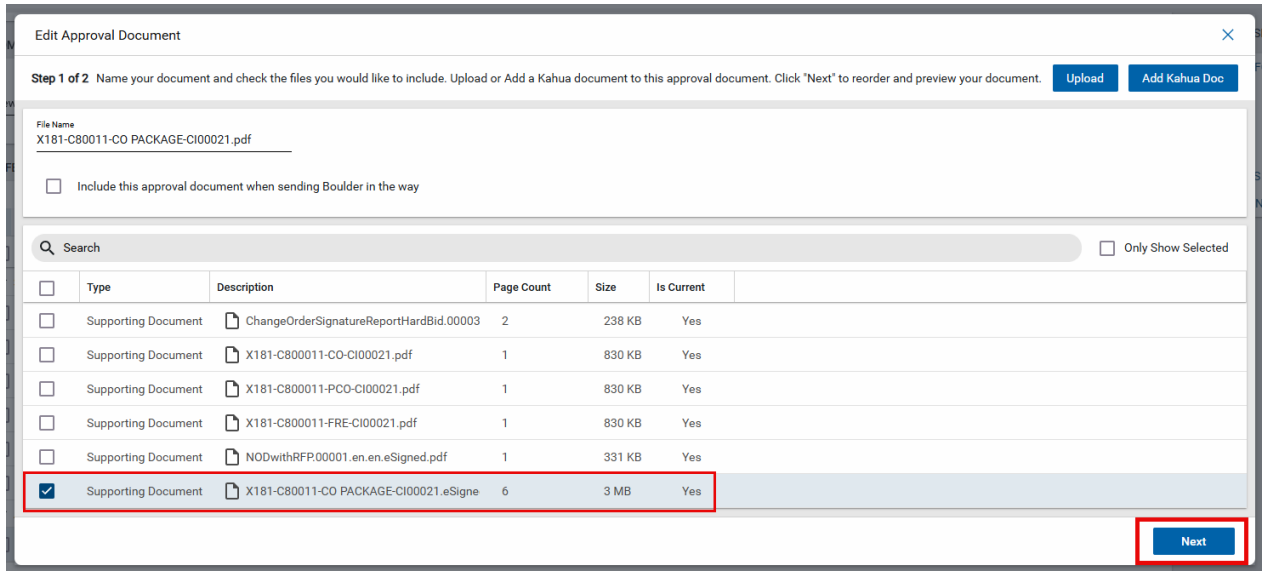
- a) Check/Select the **Approval Document**
- b) Click **Edit** in the header

REFERENCES

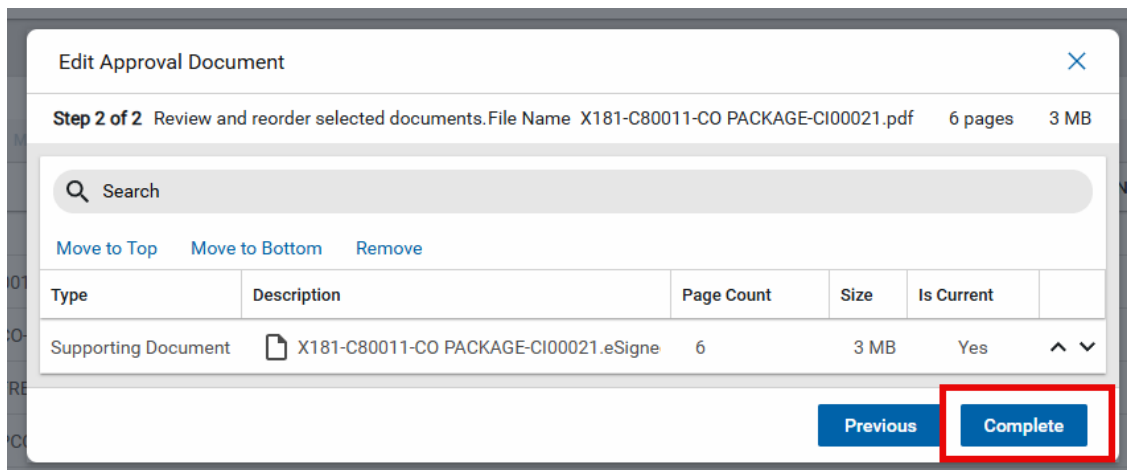
VIEW UPLOAD ADD KAHUA DOC EDIT

<input type="checkbox"/>	TYPE	DESCRIPTION	CONTRIBUTOR	DATE	SIZE	M
Supporting Document						
<input type="checkbox"/>	Supporting Document	NODwithRFP.00006.en.en.eSigned.pdf	Noor SCA PO N	3/13/2024 4:03:46 PM EDT	326 KB	
<input type="checkbox"/>	Supporting Document	X181-C800011-CO-CI00021.pdf	Evelyn Carrigan	5/17/2024 2:24:41 PM EDT	830 KB	
<input type="checkbox"/>	Supporting Document	X181-C800011-FRE-CI00021.pdf	Evelyn Carrigan	5/17/2024 2:24:41 PM EDT	830 KB	
<input type="checkbox"/>	Supporting Document	X181-C800011-PCO-CI00021.pdf	Evelyn Carrigan	5/17/2024 2:24:41 PM EDT	830 KB	
<input type="checkbox"/>	Supporting Document	X181-C8000X-Estimate-CI000XX.pdf	Evelyn Carrigan	10/9/2024 10:53:44 AM EDT	150 KB	
<input type="checkbox"/>	Supporting Document	ChangeOrderSignatureReportHardBid.00008.en.en.eSigned.pdf	Matt SCA PO D	2/3/2025 12:10:43 PM EST	239 KB	
<input type="checkbox"/>	Supporting Document	X81- C800011-CO Package-CI00027.eSigned.pdf	Matt SCA PO D	2/12/2025 11:41:06 AM EST	3 MB	
Approval Document						
<input type="checkbox"/>	Approval Document	X81- C800011-CO Package-CI00027.pdf	Matt SCA PO D	2/12/2025 11:45:10 AM EST	3 MB	

- c) In the popup window, uncheck **ALL DOCUMENTS**.
- d) Check the box next to **only** the Supporting Document called **CO Package** (This file will have a high page count because it contains all backup document that was previously included. It is usually at the bottom of the list.)
- e) Click **Next**

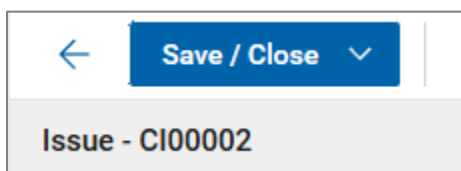


- f) Click **Complete** in the following window



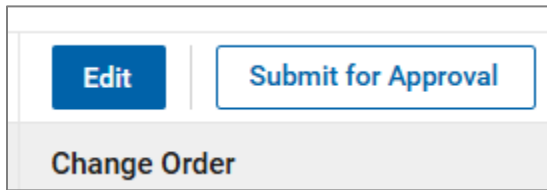
NOTE: The document needs to render. Scroll to the RIGHT to view the Render status.

- 7. Click **Save / Close**

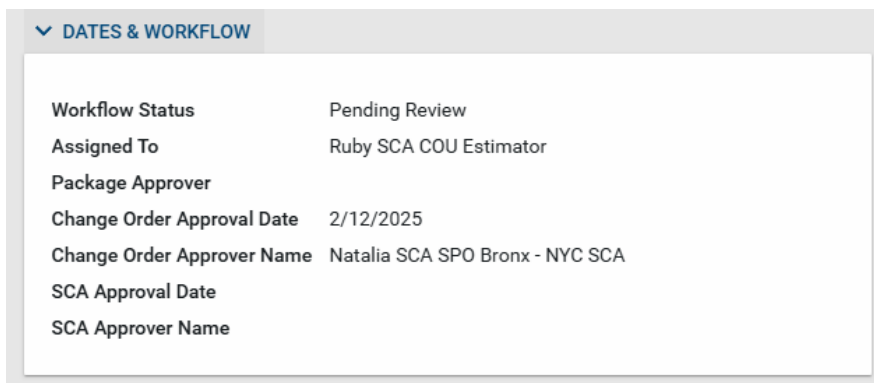


EXPENSES APP:

1. Go to the **Expenses App > Change Order**
2. Select the Change Order
3. Click **Submit for Approval** at the top of the record



NOTE: Scroll up to **Dates and Workflow** to confirm that the CO package was sent to the COU.



Change Order Types

Any type that ends in A will be handled by COU. Send an email request to allow the approval of the process, including reason why you are looking to provide an A. Based on the reason, it will be approved or rejected, for instance, they might request more documentation.

Negative Change Order

For anyone who needs to de-obligate, which is the same process as Negative Change Order, the steps are:

1. Begin with a CIC and enter the negative amount. Initiate an Issue [CIC User Guide](#)
2. Initiate the NOD
3. From the Issue, enter the negative amount in the CO field and make sure the NOD is present in the References section. Upload any additional supporting documentation.
4. Click Save/Close. The Change Order will be processed by someone in COU because it is a negative CO.
NOTE: Make sure that the Change Order has the same negative value as the contract so that it nets to \$0. Also, make sure that the same Markup percentages are on the CO as on the Contract.

Unilateral and Resolution (U, R)

A unilateral change order should be used in situations where the SCA needs to make a change to the contract without the contractor's agreement or signature. This is typically done when there is a disagreement or when the contractor's agreement cannot be obtained in a timely manner. The unilateral change order is later followed by a resolution change order, which aims to resolve the issue and requires the contractor's signature.

- Generally, a unilateral change order is a directive that the contractor must follow, but they are free to file a claim for additional costs or time incurred due to the change. Since it does not require the contractor's signature, it cannot act as a release of further claims.
- A resolution change order comes after the unilateral change order has been processed and leads to an immediate and consensual resolution between the parties involved.

The SCA needs the contractors to sign both the original unilateral change order page and the new resolution change order page in the same DocuSign request. This requires an Approval Document to compile both change orders into one PDF for the contractor to sign.

Unilateral										
U-types	Line	Scenario	Change Type	Line Status	ESTIMATE	PCO	FRE	CO	CO Suffix	Comments
Data passed from CES	1	Unilateral	U	Approved	>\$25K OR <\$25K	\$ Value	\$ Value	\$ Value	U	
Data passed from CES	2	Resolution	R	Approved		\$ Value	\$ Value	\$ Value	R	If not resolve, Add change type R1,R2 and so on. Final Change order suffix always R.

Unilateral Change Order (Data passed from CES):

1. Navigate to the **Issues App**
2. Click **New**
3. **Details Section:** Fill out the Subject

▼ DETAILS

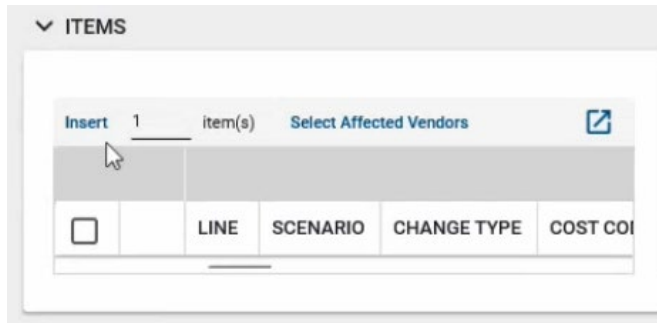
CI Number

Subject
Field is required.

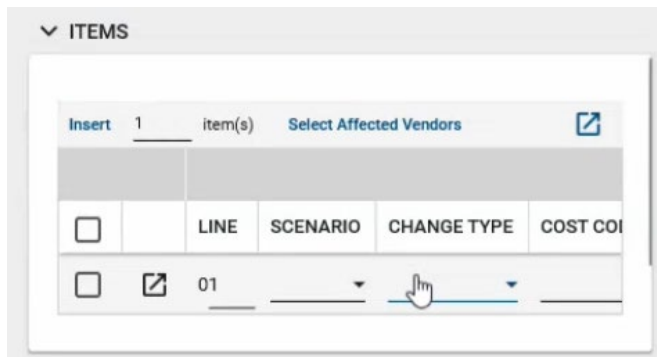
CI Status ▼

Initiation Date
7/1/2024

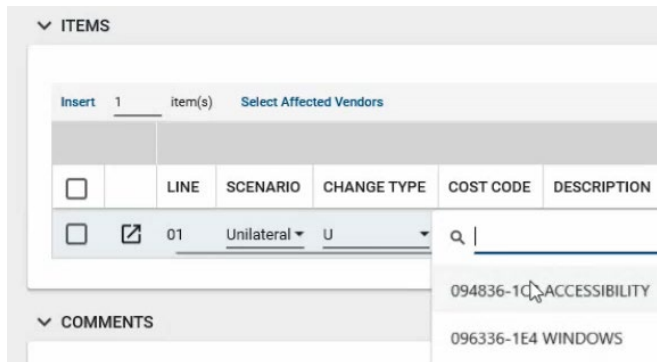
4. **Items Section:**
 - a. Click **Insert** to create the first line



b. **Change Type:** Click the dropdown menu and select **U**



c. You'll see the Scenario field changed to Unilateral. Select the **Cost Code**



d. Enter all **Potential Costs** (Estimate, PCO, FRE, CO)

POTENTIAL COST					CONSECUT
ESTIMATE	PCO	FRE	CO	CO SUFFIX	ESTIMATE
\$	\$ 10,000.00	\$	\$ 10,000.00		

e. Enter all **Dates** (Estimate, PCO, FRE, CO)

5. **References** Section: Upload all appropriate documents

6. Click **Save/Close**

7. **Items Section:** Click **Initiate Change Order**
 - a. **Popup window:** click **Start Processing**

This takes you to the **Expenses App:**

8. **Scope Section:** Enter **Scope of Work (Required):** use specific language required by SCA Upper Management

9. Click **Save/Close**
10. Click **Submit for Signature**

Resolution

A resolution change order is the formal contract amendment agreement that finalizes the terms of the change, including any additional costs or time extensions that may have been negotiated after the unilateral change order was issued. The resolution change order requires the contractor's signature, signifying their agreement to the terms.

1. Navigate to the **Issue**
2. Click **Edit**
3. **Items Section:** Click **Insert** to create a 2nd line.
 1. Select **Change Type: R**
 2. Select **Cost Code**

Issue - CI00091						
ITEMS						
Insert 1 Item(s) Select Affected Vendors						
DETAILS						
	LINE	SCENARIO	CHANGE TYPE	COST CODE	DESCRIPTION	LINE STATUS
<input type="checkbox"/>	01	Unilateral	U	094836-1C8 ACCESSIBILITY	ACCESSIBILITY	Locked
<input checked="" type="checkbox"/>	02	Resolution	R	094836-1C8 ACCESSIBILITY	ACCESSIBILITY	

3. You can choose the **Lead Estimator** from the dropdown menu or it will default to the COU Estimator listed in the Project Roster.
4. Enter all **Potential Costs and dates** (Estimate, PCO, FRE, CO). *If the PCO on the R line + previous lines of approved amounts add up to more than \$25k, it goes to the COU for processing and approval.*

Issue - CI00091

▼ ITEMS

Insert 1 item(s) Select Affected Vendors

				POTENTIAL COST			
<input type="checkbox"/>	LEAD ESTIMATOR	ASSIGNED DATE	ESTIMATE	PCO	FRE	CO	CO
<input type="checkbox"/>	<input type="checkbox"/>		\$	\$ 10,000.00	\$	\$ 10,000.00	
<input type="checkbox"/>	<input type="checkbox"/>		\$	\$ 10,000.00	\$	\$ 10,000.00	

5. Click **Initiate Change Order**
 - a. Click **Start Processing**
6. **Expenses App**> Change Order: Enter **Scope of Work (Required)**
7. Click **Save/Close**
8. Click **Submit to Compile Resolution Approval Document** at the bottom, which sends the CO to the **COU Lead Estimator** to compile the approval document.

▼ ITEMS

Status Projected

Items Include Quantity No

NO	COST CODE	DESC	STATUS	TOTAL
<input type="checkbox"/>	*01	*004036 100	*ACCESSIBILITY	Projected

Submit to Compile Resolution Approval Document Move to Pending Amendment ▼

The Estimator will add the SCA-signed unilateral change order to the References section of the Issues app, then create the approval doc including the unilateral and resolution change orders that will go to the GC to sign.

If for some reason the CO is not resolved, for each cycle you will create a new line with Change Type: R1, R2
Final Change Order always has suffix R.

[Work Allowance](#) – Please click the hyperlink for each Scenario listed below for Instructions, which are color-coded.

Work Allowance										
U-types	Line	Scenario	Change Type	Line Status	ESTIMATE	PCO	FRE	CO	CO Suffix	Comments
CES	1	Allowance CO	W	Approved	>\$50K			\$ Value	W	Scenario 1
CES	2	Allowance Resolution	WR	Approved		\$ Value	\$ Value	\$ Value	WR	WR shall be process

									as per Article 7.	
Manually entered	2	Allowance Supersede	SW	Active / Approved* >\$50K				\$ Value	SW	Scenario 2 - Start with (W)
CES	2	Allowance Resolution	SWR	Approved	\$ Value	\$ Value	\$ Value		SWR	Resolution
CES	2	Allowance Resolution	WR	Closed	\$ Value				WR	
CES	3	Allowance Resolution Supersede #1	WR1	Approved	\$ Value	\$ Value	\$ Value		WR	Scenario 3 Close line above and enter Change type WR1. If executed change CO suffix to WR.
CES	4	Allowance Resolution Supersede #2	WR2	Active / Approved*	\$ Value	\$ Value	\$ Value		WR	If WR1 is closed the WR2 can be initiated - Change type WR remains as the CO suffix if executed.
Manually entered	4/5	Allowance Unilateral Resolution	SWU	Approved	\$ Value	\$ Value	\$ Value		SWU	Scenario 4 Updated CO Suffix from WR to SWU. It can be enter in the 4th or 5th line. If unilateral
Manually entered	3	Allowance Resolution Revision	SWR	Active / Approved*	\$ Value	\$ Value	\$ Value		SWR	Enter new line after SWU to

Scenario 1: Allowance

Above \$50K the work allowance solution requires Bulletin, to be combined with the CO.
Same process as CM13/PCM, per document requirements.

1. Issues App> Select the Change Issue
2. Click **Edit**
3. **Items Section:**
 - a. Click **Insert** to create the first line
 - b. Select **Change Type: W**
 - c. Select **Cost Code**
 - d. Enter the **Estimate** (equal to the CO Amount) and the **CO Amount**. When “W” CO is > 50k the Estimate value and the change order value must be the same.
 - e. Enter **CO Date**
4. **References** Section: Upload all appropriate documents
5. Click **Initiate Change Order**
 - a. Click **Start Processing**

This takes you to the **Expenses App:**

6. **Scope of Work:** use specific language required by SCA Upper Management
7. Click **Save/Close**
8. Click **Submit for Signature**

Allowance Resolution – the Allowance CO has been approved.

1. In the **Issues App**,
 - a. Click **Edit**
 - b. **Items** Section: Click **Insert** to add a 2nd line
 - c. **Change Type:** WR
 - d. Enter all **Potential Costs** (Estimate, PCO, FRE, CO)
 - e. Enter all **Dates**
 - f. **Upload** appropriate documentation

Scenario 2: Allowance Supersede

Above \$50K the work allowance solution requires Bulletin, to be combined with the CO.
Same process as CM13/PCM, per document requirements.

1. Issues App> Select the Change Issue

2. Click **Edit**
3. **Items Section:**
 - a. Click **Insert** to create the first line
 - b. Select **Change Type: W**
 - c. Select **Cost Code**
 - d. Enter **CO Amount**
 - e. Enter **CO Date**
4. **References** Section: Upload all appropriate documents
5. Click **Initiate Change Order**
 - a. Click **Start Processing**

This takes you to the **Expenses App**:

6. **Scope of Work:** use specific language required by SCA Upper Management
7. Click **Save/Close**
8. Click **Submit for Signature**

Allowance Supersede – the Allowance CO has been approved.

1. In the **Issues App**,
 - a. Click **Edit**
 - b. **Items** Section: Click **Insert** to add a 2nd line
 - c. **Change Type: SW**
 - d. Enter all **Potential Costs** (Estimate, PCO, FRE, CO)
 - e. Enter all **Dates**
 - f. **Upload** appropriate documentation

Allowance Resolution – the Allowance CO has been approved.

1. In the **Issues App**,
 - a. Click **Edit**
 - b. **Items** Section: Click **Insert** to add a 2nd line
 - c. **Change Type: SWR**
 - d. Enter all **Potential Costs** (Estimate, PCO, FRE, CO)
 - e. Enter all **Dates**
 - f. **Upload** appropriate documentation

Scenario 3: Allowance Resolution Supersede 1, 2 etc.

If PCO needs to be changed – Scenario 3 WR, WR1, WR2 if 1 or 2 are executed, the suffix will still be WR

Scenario 4: Allowance Unilateral Resolution or Allowance Resolution Revision

Scenario 4 – SWU if they don't agree on FRE, and GC won't sign CO, but job has to continue – we want to issue a CO so they can start billing into it. SWU

Then they can have an SWR – same idea as U or R

Superseded - [Please click the hyperlink for each Scenario listed below for Instructions, which are color-coded.](#)

Superseded										
U-types	Line	Scenario	Change Type	Line Status	ESTIMATE	PCO	FRE	CO	CO Suffix	Comments
CES	1			Closed	>\$25K OR <\$25K	\$ Value	\$ Value			Scenario 1 -
CES	2	Supersede	S	Approved		\$ Value	\$ Value	\$ Value	S	
CES	3	Supersede #2	S 1	Approved		\$ Value	\$ Value	\$ Value	S	Scenario 2 - To enter S1 change type S must be Closed - CO is not executed
CES	3	Supersede #2	S 2	Approved		\$ Value	\$ Value	\$ Value	S	Scenario 3 - To enter S2 change type S1 must be Closed - CO is not executed

Scenario 1 - VERY IMPORTANT - MORE THAN U OR W

1. Go to **Issues** app
2. Click **Edit**
3. **Items Section:s**
 - a. Click **Insert** to create the first line
 - b. Select **Change Type: S**
 - c. Select **Cost Code**
 - d. Enter all **Potential Costs** (Estimate, PCO, FRE, CO)
 - e. Enter all **Dates**
4. **References** Section: **Upload** the documentation
5. Click **Save/Close**
6. Print **hard copies** of the **CO package** (reach out to your SPO or SCA Upper Management to understand what documentation is required.)
7. Submit hard copies to COU – they will continue the process.

Scenario 2 – Supersede #2

To enter S1 change type S must be Closed - CO is not executed.

Scenario 3 – Supersede #3

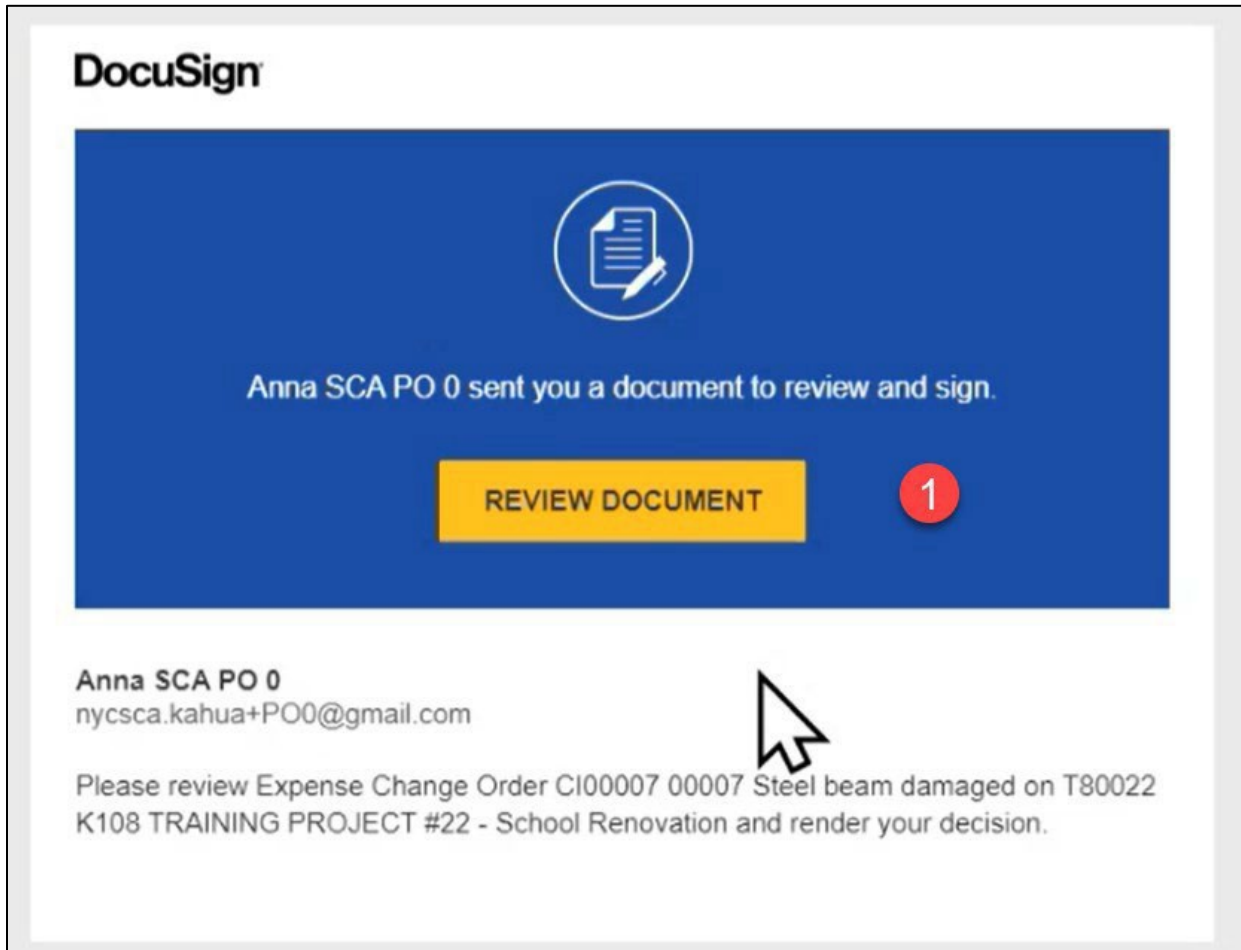
To enter S2 change type S1 must be Closed - CO is not executed. IF PCO or Scope of work keeps getting updated, you can have S2, S3 etc., but Suffix is still S.

Superseded Unilateral

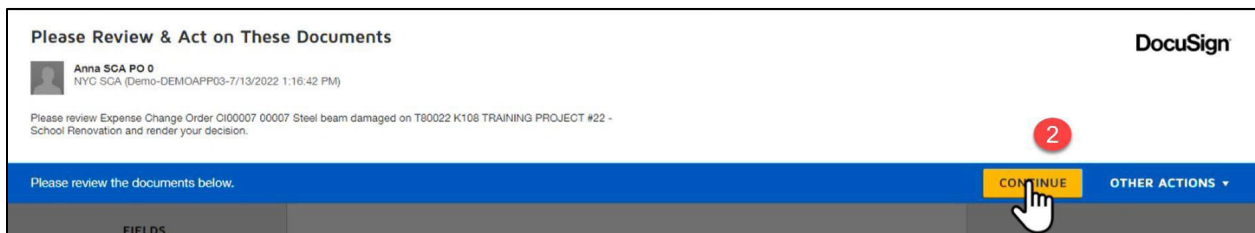
Superseded Unilateral										
U-types	Line	Scenario	Change Type	Line Status	ESTIMATE	PCO	FRE	CO	CO Suffix	Comments
CES	3	Supersede #2	S, S1, S2	Approved		\$ Value	\$ Value	\$ Value	SU	Scenario 4 - GC does not agree with CO amount - PO updates the change type suffix (S, S1, S2) to SU
Data passed from CES	2	Resolution	SR	Approved		\$ Value	\$ Value	\$ Value	SR	Once CO suffix (S, S1 and S2) is executed / workflow completed - PO is able to initiate SR package.

DocuSign instructions

1. Go to your external email account (ex: Outlook) and select the email that includes the subject 'Review and Signature Task.'
2. Select **Review Document**.



3. Select **Continue**.



4. Click **Signature** on the left.

DocuSign Envelope ID: FC544FF5-171C-421F-B5F2-73707850C83F

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**CHANGE ORDER
No. 00007**

PROJECT: T80022 K108 TRAINING PROJECT #22 - School Renovation

TITLE: Steel beam damaged **DATE:** 6/16/2023
FROM: NYC SCA **CONTRACT NO.:** T80022
TO: VV Construction **CHANGE ISSUE:** C100007
123 Main St
New York, NY 10003

ATTN: Ava External Contractor V

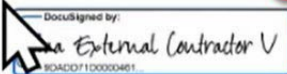
DESCRIPTION OF WORK
Steel beam in cafeteria is damaged and needs to be replaced

Total: \$8,200.00 Increase: 14 Calendar Days

The Contractor agrees to perform or omit work, as described in this Change Order, for the amount and within the contract scheduled completion time period as adjusted above. In accepting and executing this Change Order the Contractor, its heirs, executors, administrators, successors and assigns, hereby release and forever discharge the New York City School Construction Authority, its successors and assigns from any and all actions, causes of action, claims and demands whatsoever in Law or in equity which the Contractor ever had, now has or may have against the New York City School Construction Authority in any way arising out of the change described above.

Contractor Signature: _____ Date: _____
SCA Authorized Signature: _____ Date: _____

5. Drag the signature to the **Contractor Signature** field and **click again** to set the signature.

Contractor Signature:  Date: _____

SCA Authorized Signature: _____ Date: _____

DATES ARE MANDATORY!

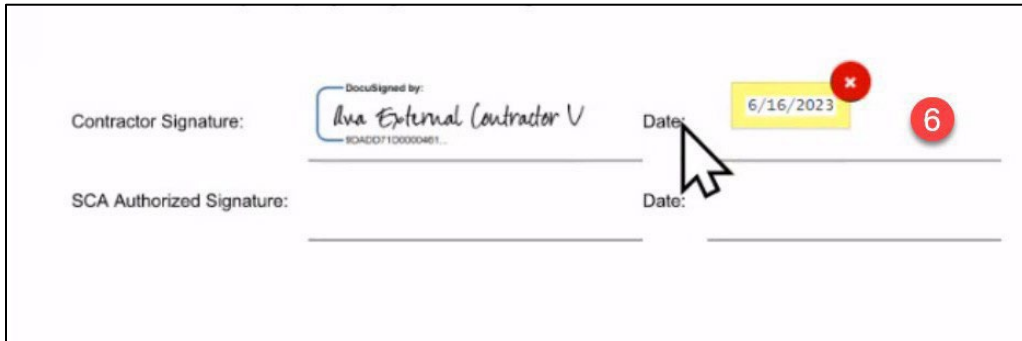
- When you are prepping the Approval Doc for the SPO – **make sure to review the PDF first!**
If the GC forgot to enter the date, the **SPO can reject the DocuSign**, which will send a new link to the GC.

If the Change Order makes it all the way through the process without dates, it will get sent back and delay the process.

6. Click **Date Signed** on the left.

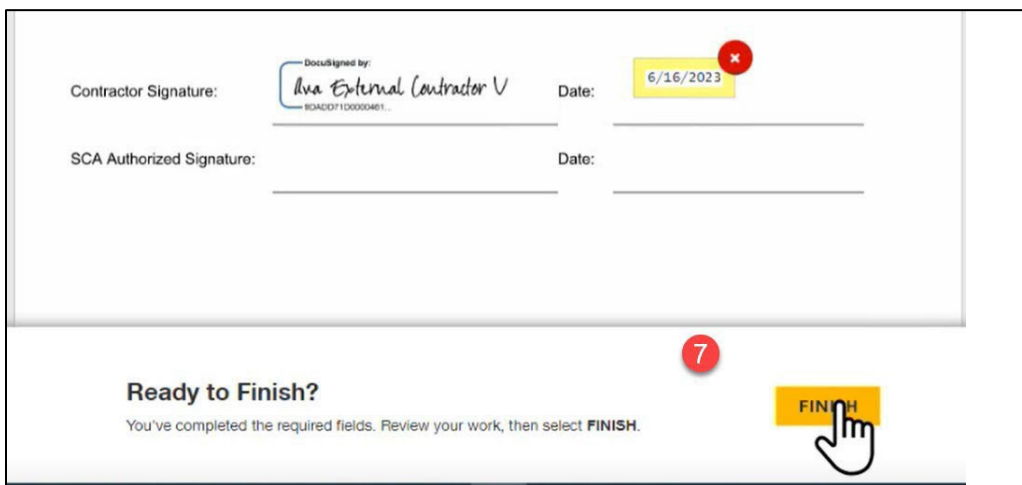
FIELDS Signature Initial Stamp Date Signed Name First Name	DocuSign Envelope ID: FC544FF5-171C-421F-B5F2-73707850C83F	DEMONSTRATION DOCUMENT ONLY PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE 999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200 www.docusign.com
	93-30 Thompaso Avenue Long Island City, NY 11101-2046	CHANGE ORDER No. 00007
	PROJECT: T80022 K108 TRAINING PROJECT #22 - School Renovation	
	TITLE: Steel beam damaged FROM: NYC SCA TO: VV Construction 123 Main St New York, NY 10003 ATTN: Ava External Contractor V	DATE: 6/16/2023 CONTRACT NO: T80022 CHANGE ISSUE: C100007

7. Drag the **Date** to the **Contractor Signature** field and **click again** to set the date.



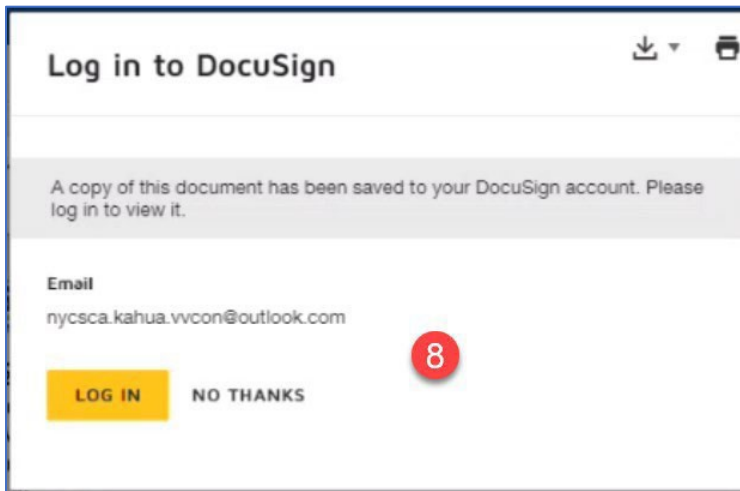
The screenshot shows two signature fields. The top field is labeled "Contractor Signature:" and contains a signature "Iva External Contractor V" with a DocuSigned by: stamp. To its right is a "Date:" field with "6/16/2023" entered. A red circle with an "x" is over the date field, and a red circle with the number "6" is next to it. A mouse cursor is pointing at the date field. Below it is the "SCA Authorized Signature:" field, which is empty, with a "Date:" field to its right.

8. Click **Finish**.



The screenshot shows the "Ready to Finish?" screen. The signature fields from the previous step are visible at the top. Below them, the text reads "Ready to Finish?" followed by "You've completed the required fields. Review your work, then select **FINISH**." A red circle with the number "7" is over the "FINISH" button, which is highlighted in yellow. A hand cursor is pointing at the button.

9. Click **No Thanks** to close the Log in to DocuSign window.



The screenshot shows a "Log in to DocuSign" window. At the top, it says "Log in to DocuSign" with download and print icons. Below that, a message states: "A copy of this document has been saved to your DocuSign account. Please log in to view it." Underneath, the email address "nycsca.kahua.vvcon@outlook.com" is displayed. At the bottom, there are two buttons: "LOG IN" (highlighted in yellow) and "NO THANKS". A red circle with the number "8" is over the "NO THANKS" button.

10. Click **Expenses**> **Change Orders**> **Signatures** section to view the GC Signature.

NOTE: The size of the DocuSign document may impact the processing of the document through the system and may require a few minutes to appear.

If the signed approval document is not present, click **Refresh** to refresh the screen.

