

## CHANGE ORDER PROCESS

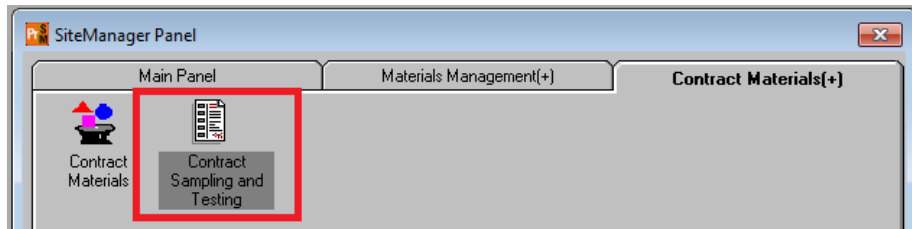
Once a change order with the item “Additional Work” has reached a status of having “final Approval” an email is generated to the people in the region assigned to the contract with the SiteManager role **REG - M&T supervisor** .

This will be their prompt to research the Change order to see if it will need materials and Sampling & Testing requirements loaded once final approval is given. The first step will be to discuss the Change Order with the Project Engineer. They will need to agree on required materials and tests.

Then before modifying the contract S&T requirements, the M&T Supervisor will need to run report RR005 to make sure there are no additional items that have been added with the 999.99.999- No tests Assigned material code attached. Other items will have “Global” test requirements linked automatically.

To make modifications to new items follow the steps below:

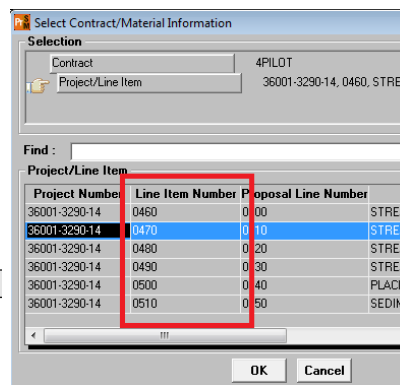
1. We now open the **Contract Sample and Testing Requirements** window:



2. Find each item on report RR005 by matching the “**Line Item Number**”

**Item**  
Contract: 4PILOT Project Number: 36001-3290-14  
Item Code: 209-03.55 Item Unit: Each  
Item Description: STREAM MITIGATION (DESCRIPTION)  
Category Number: 0100 **Line Item Number: 0470**  
Material Code: 999.99.999 Material Name: No Test Assigned

Requirements (Testing)	
Sample Type:	Information Only
Acceptance Method:	Information Only
Test Method Description:	M020 - Visually Accepted



In the **Contract Sample and Testing Requirements** window, REG - M&T Supervisor associates the proper materials in place of the placeholder material to the contract item, sets the conversion factor, and associates appropriate tests.

3. REG - M&T Supervisor deletes the placeholder material, **999.99.999 – No Test Assigned** from the Contract Sample and Testing Requirements window.

The screenshot shows the 'Contract Sample and Testing Requirements' window. At the top, there is a toolbar with a 'New' icon circled in red. The window contains the following fields and data:

- Contract:** 4PILOT
- Project:** 36001-3290-14
- Line Item Nbr:** 0350
- Bid Item Code:** 203-01.79
- Item Unit:** C.Y.
- Proposal Line Nbr:** 0370
- Desc. 1:** EXCAVATION/BACKFILL
- Desc. 2:**
- Supp Desc1:**
- Supp Desc2:**

Material Code	Material Full Name	Status	Material Short Name
999.99.999	No Test Assigned	A	No Test Assigned

Below the table, the following fields are visible:

- Material Code:** 999.99.999
- Conversion Factor:** 1.00000
- Material Quantity:** 25.0000
- Material Unit:** NO UNIT(S) SELECTED
- Special Instruction:**

4. Next the correct material(s) and test(s) need to be added to the item.

- i. Click the "New" icon at the top of the window.
- ii. Enter material code, conversion factor, and Special Instruction (special instruction is optional) and save. **NOTE:** use zero conversion factor if you do not want money withheld from the contractor if all tests are not performed.

The screenshot shows the 'Contract Sample and Testing Requirements' window after a new material has been added. The 'New' icon in the toolbar is circled in red. The window contains the following fields and data:

- Contract:** 4PILOT
- Project:** 36001-3290-14
- Line Item Nbr:** 0350
- Bid Item Code:** 203-01.79
- Item Unit:** C.Y.
- Proposal Line Nbr:** 0370
- Desc. 1:** EXCAVATION/BACKFILL
- Desc. 2:**
- Supp Desc1:**
- Supp Desc2:**

Material Code	Material Full Name	Status	Material Short Name
205.04.001	Embankment Material (Unclassified)		Unclass Embankment

Below the table, the following fields are visible:

- Material Code:** 205.04.001
- Conversion Factor:** 1.00000
- Material Quantity:**
- Material Unit:** Cubic Yard
- Special Instruction:** Sample must be sent to M&T lab for testing before use

- iii. Next, click on the *Sample and Testing* tab. Select the new icon and enter data for each test that will be required for the material.

Contract Sample and Testing Requirements

Materials **Sample and Testing**

Contract 4PILOT Project 36001-3290-14 Line Item Nbr 0350 Bid Item Code 203-01.79  
 Item Unit C.Y.  
 Proposal Line Nbr: 0370  
 Desc. 1: EXCAVATION/BACKFILL  
 Desc. 2:  
 Supp Desc1:  
 Supp Desc2:

Material Code	Material Full Name	Status	Material Short Name
205.04.001	Embankment Material (Unclassified)		Unclass Embankment

Producer Supplier Code	Sample Type	Acceptance method	Test Method
	Information Only	Information Only	T100
	Information Only	Information Only	T88
	Information Only	Information Only	T89
	Information Only	Information Only	T99

Producer Supplier Code:   
 Sample Type: Information Only  
 Acceptance Method: Information Only  
 Test Method: T99 T99 - Moisture-Density Relations of Soils

Sample Location: Placement Site  
 Sample Units:   
 Sample Responsibility: Project Inspector  
 Test Responsibility: Detection Lab

Rate: 1  
 Frequency: 99,999,000  
 Sample Size:

- iv. Repeat this process for additional materials linked to the item. Save.
  - v. Continue the previous steps for all items with the 999.99.999 material code.
5. Once all instances of items with **999.99.999 – No Test Assigned** have been addressed, the REG - M&T Supervisor notifies the Operations Field office to let them know the new item/material combinations have been created.