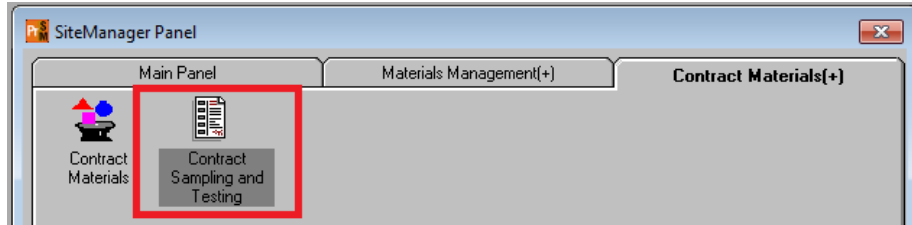# To add contract sampling and testing requirements for items added by change orders
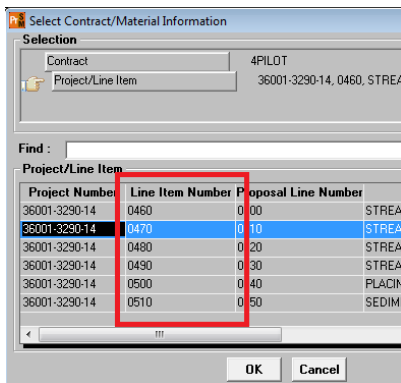
After a change order is approved, make any needed contract specific modifications to the sampling and testing requirements. When a change order is approved, global S&T requirements are automatically added to Contract S&T. Modify based on proposal specifications, project plans or the addition or modification to a contract item via a change order.

1. REG - Operations Supervisor agrees to allow contractor to install material not associated to an item on the contract. Begin to draft change order with the Extra Work function selected.

1. FIELD - Operations Supervisor sends an email to the REG - M&T Supervisor to notify them of the material being used.

2. REG - M&T Supervisor identifies tests to be performed and samples to be taken for the type of material on that item.
   REG - M&T Supervisor replies to the email with requirements for sampling and testing.

3. For items not available on a contract, FIELD - Operations Supervisor informs FIELD - Operations Inspector to use "SiteManager Loose Leaf Forms" to document work. Also, inform FIELD - Operations Inspector to log sample records, but not to associate sample records to contracts.

4. Once a change order with the Extra Work function selected reaches first-level approval, [Customization: MTC025] notifies REG - M&T Office Staff that a new item may be added to the contract.

5. Once a change order reaches final approval, [Customization: MTC024] notifies REG - M&T Office Staff that a new item has been added to the contract.

6. If "SiteManager Loose Leaf Forms" were used in Step 4, FIELD - Operations Office Staff and FIELD - Operations Inspector use Daily Work Reports window's attachment function to attach "SiteManager Loose Leaf Forms" as an OLE.

7. REG - M&T Supervisor reviews and modifies contract sample and testing requirements for materials associated to the new item.

8. REG - M&T Supervisor emails FIELD - Operations Supervisor that the contract sampling and testing requirements have been established for materials associated to the new item.

9. FIELD - Operations Supervisor notifies the appropriate personnel.

10. For any samples recorded prior to the change order being approved, all sample creators associate all samples previously recorded to the appropriate contracts—as soon as possible.

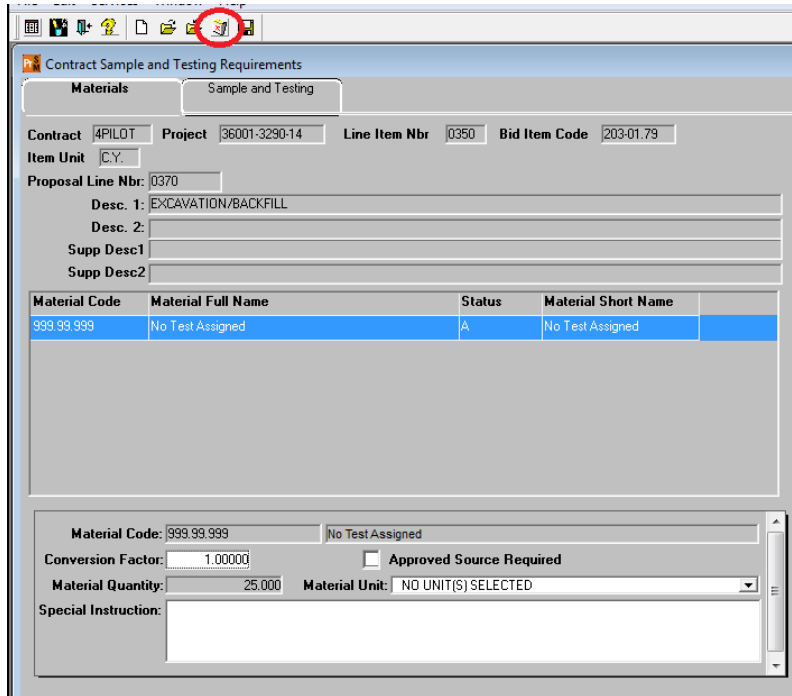11. We now open the ***Contract Sample and Testing Requirements*** window:

12. Find each item added by the change order by matching the "***Line Item Number***"
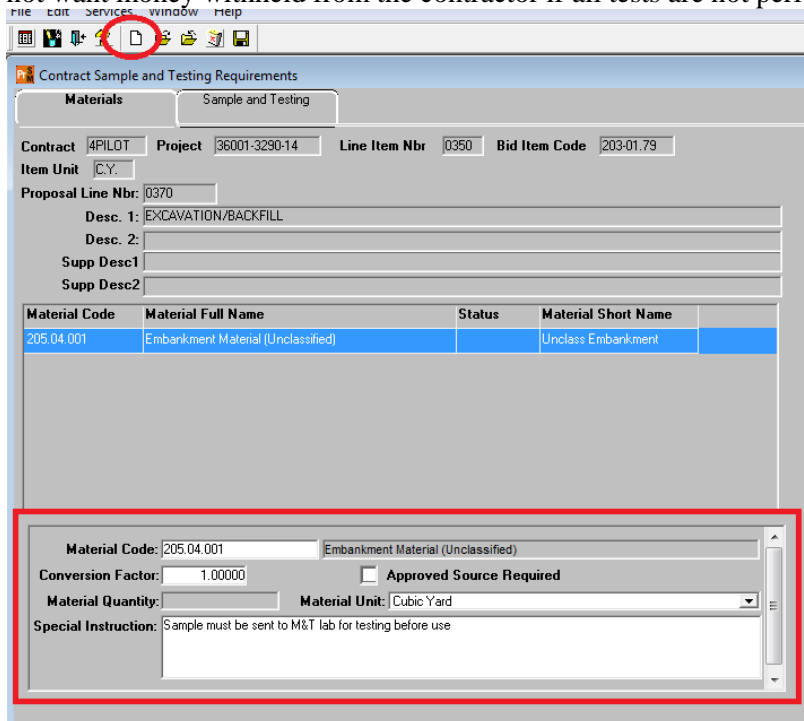

   In the ***Contract Sample and Testing Requirements*** window, REG - M&T Supervisor associates the proper materials in place of the placeholder material to the contract item, sets the conversion factor, and associates appropriate tests.

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

14. 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.

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.

iv. Repeat this process for additional materials linked to the item. Save.

Continue the previous steps for all items added by the change order.