

CHANGE MANAGEMENT

The phases of Change Management will be captured in PMWeb in two modules: **Online Change Request (OCR)** and **Commitment CO**. Phases to be captured in the modules include:

- Contract Change Request/Authority (CCR/A) – SDA Form 500
- Contractor's Proposal
- Authority Agent Recommendation (AAR) – SDA Form 501
- Change Order – SDA Form 503
- Construction Change Directive (CCD)
- Contractor Claim Notice

Special Notes

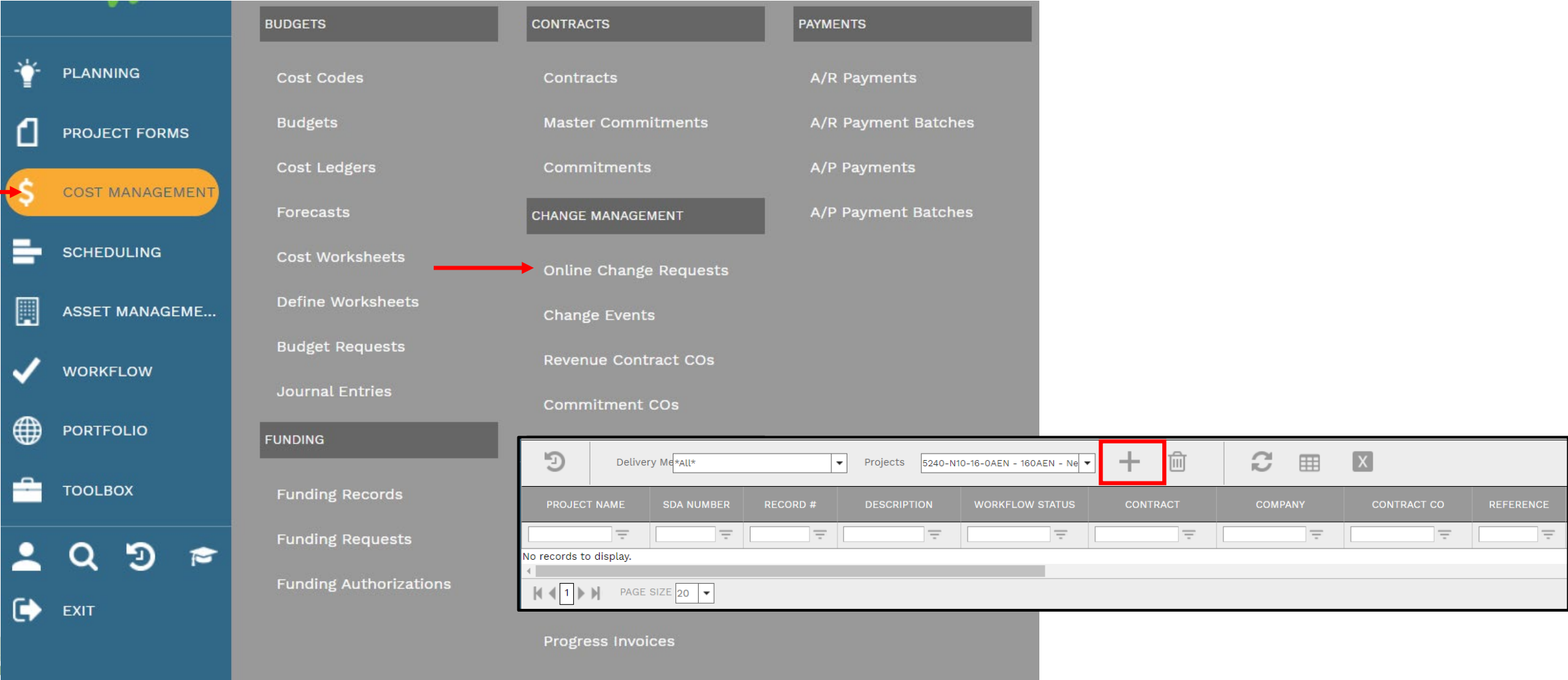
- Any of the phases of Change Management as they have been defined can be skipped if they are inappropriate considering the circumstances around the change.
- All Change Orders for E-Rate contracts should be entered into PMWeb. They will be automatically updated in the SIMS (Schools Information Management System) Accounts Payable system.
- Change Orders, Task Orders and Amendments that are not related to Design/Construction/E-Rate/CM Contracts will be updated automatically in PMWeb on a daily basis. This includes Real Estate and other types of contracts that are not directly managed in PMWeb.
- As with any document in PMWeb, Change Management documents processed through the workflow that have a status of Rejected or Withdrawn are permanently closed and cannot be reopened for processing.



Entering the Phases of Change Management

Note: this example utilizes proposal documents for a Change Order

Initial/proposal documents begin in the **Online Change Requests (OCR)** module. Under **Change Management**, click **Online Change Requests**. Click the **Add** button to begin. 



The screenshot displays a software interface with a dark blue sidebar on the left containing navigation icons and labels: PLANNING, PROJECT FORMS, COST MANAGEMENT (highlighted with a red arrow), SCHEDULING, ASSET MANAGEMEN..., WORKFLOW, PORTFOLIO, TOOLBOX, and EXIT. The main content area is divided into several sections: BUDGETS, CONTRACTS, PAYMENTS, and CHANGE MANAGEMENT. Under CHANGE MANAGEMENT, 'Online Change Requests' is highlighted with a red arrow. Below this, there is a table with columns: PROJECT NAME, SDA NUMBER, RECORD #, DESCRIPTION, WORKFLOW STATUS, CONTRACT, COMPANY, CONTRACT CO, and REFERENCE. The table is currently empty, showing 'No records to display.' and a page size of 20. A red box highlights the '+' button in the table's toolbar.

The document screen displays. Enter the following information:

- Company
- Project (**required**)
- Commitment (**required**)
- Description
- Contract #
- Record # (**required**)
- Revision (when applicable)
- Category
- Date
- Date Received
- Cause
- Received By
- Description of Claim/Scope
- School Name
- PMF/CM
- District Name
- Project Manager

In this example, the first phase of Change Management, the CCR/A document is being entered, as indicated in the Category field. Once completed, click the **Save** button to continue.

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✉️
🖨️
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MAIN

<p>Company ⋮ <input type="text" value="V204532 - Dobco, Inc."/></p> <p>Project* <input type="text" value="5240-N10-16-OAEN - 160AEN - NewG"/></p> <p>Commitment* <input type="text" value="Dobco, Inc. - HU-0029-B01 - Design"/></p> <p>Description <input type="text" value="Underground Storage Tank"/></p> <p>Contract # <input type="text" value="HU-0029-B01"/></p> <p>Record #* <input type="text" value="001"/></p> <p>Status / Revision <input type="text" value="Draft"/> <input style="width: 30px;" type="text"/></p> <p>Type <input type="text" value="CCR/A"/></p> <p>Category <input type="text" value="D-B-E"/></p> <p>Post As <input type="text" value="Revised Scope"/></p> <p>Commitment CO <input type="text"/></p>	<p>REQUESTED</p> <p>Date <input type="text" value="05-22-2023"/> 📅</p> <p>Date Received <input type="text"/></p> <p>Cause <input type="text" value="Diff. Site Conditions"/></p> <p>Received By <input type="text"/></p> <p>Description of Claim/Sc... <input style="height: 60px;" type="text"/></p> <p>CHANGE REQUEST RECAP</p> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th></th> <th>COSTS</th> <th>DAYS</th> </tr> </thead> <tbody> <tr> <td>Original Value</td> <td>\$0.00</td> <td>0</td> </tr> <tr> <td>Approved Changes</td> <td>\$0.00</td> <td>0</td> </tr> <tr> <td>Revised Value</td> <td>\$0.00</td> <td>0</td> </tr> <tr> <td>This Request</td> <td>\$0.00</td> <td>0</td> </tr> </tbody> </table>		COSTS	DAYS	Original Value	\$0.00	0	Approved Changes	\$0.00	0	Revised Value	\$0.00	0	This Request	\$0.00	0	<p>USER DEFINED FIELDS</p> <p>School Name <input style="width: 100%;" type="text"/></p> <p>PMFCM <input type="text" value=""/> ⌵</p> <p>District Name <input style="width: 100%;" type="text"/></p> <p>Project Manager <input type="text" value=""/> ⌵</p>
	COSTS	DAYS															
Original Value	\$0.00	0															
Approved Changes	\$0.00	0															
Revised Value	\$0.00	0															
This Request	\$0.00	0															

Click **Add** to enter the preliminary information in the bottom of the screen. Enter the information on the peach-colored line. Enter the Description, Ext Cost (when applicable), Cost Code and any Notes required. Click the **Save** button when done.

Drag a column header and drop it here to group by that column

Edit Selected Lines **+ Add** Add Items Delete Refresh Use Units Export To Excel Paste From Excel Layouts

LINE #	ATTACHMENTS	DESCRIPTION	ITEM	EXT. COST	COMMITMENT LINE	COST CODE	CCO ID	NOTES	DAYS

Drag a column header and drop it here to group by that column

Save Cancel

LINE #	ATTACHMENTS	DESCRIPTION	ITEM	EXT. COST	COMMITMENT LINE	COST CODE	CCO ID	NOTES	DAYS
		Underground Storage Tank		\$0.00		030-CS0001-000001			0



The **SDA Data** tab contains information that will be completed by the SDA's internal Contract Management Division (CMD) group.

001 - 160AEN - NewGrade 7 to 9 Sch

MAIN **SDA DATA** NOTES ATTACHMENTS WORKFLOW NOTIFICATIONS

Checklist Attachment

Notice Of Claim

CMD

Cost Recovery Only

Potential Value Of Recovery

History

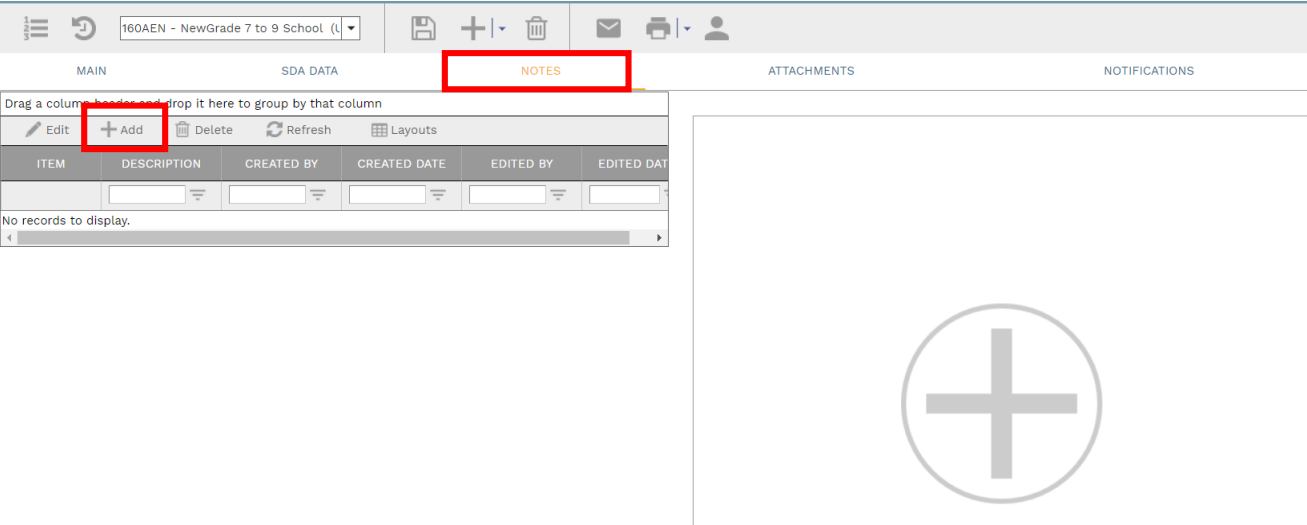
OCR Fields

Edit

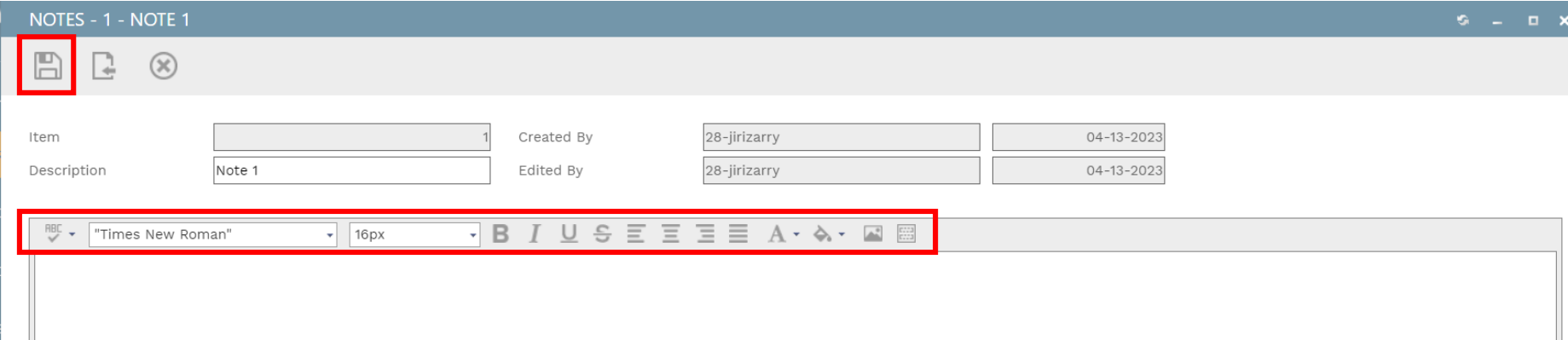
SPEC	UOM	DATA	NOTES
CCE Review Only		<input type="checkbox"/>	
Date Request Received			
Project Scope			
Date Informational Docs Rcvd:			
Date Proposal Received			
Proposal Reviewed			
193A Reviewed			
Constructability			
CCE Type			
CMDs CCE Comments			
CMDs CCE Completion			
Estimate Review Status			
Program Operations Team			
Contract Number			



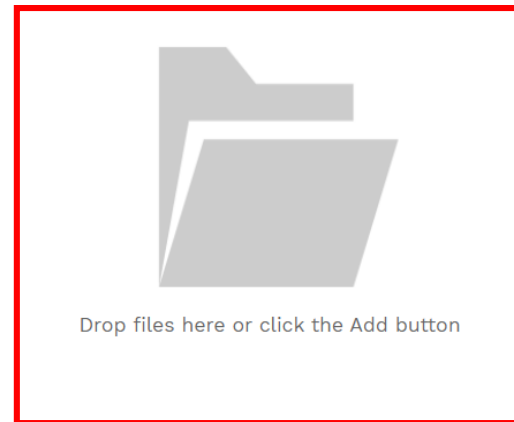
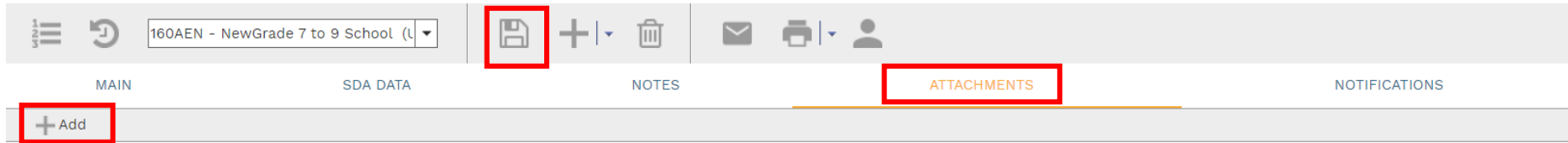
Click **Add** on the **Notes tab** to add additional notes as needed.



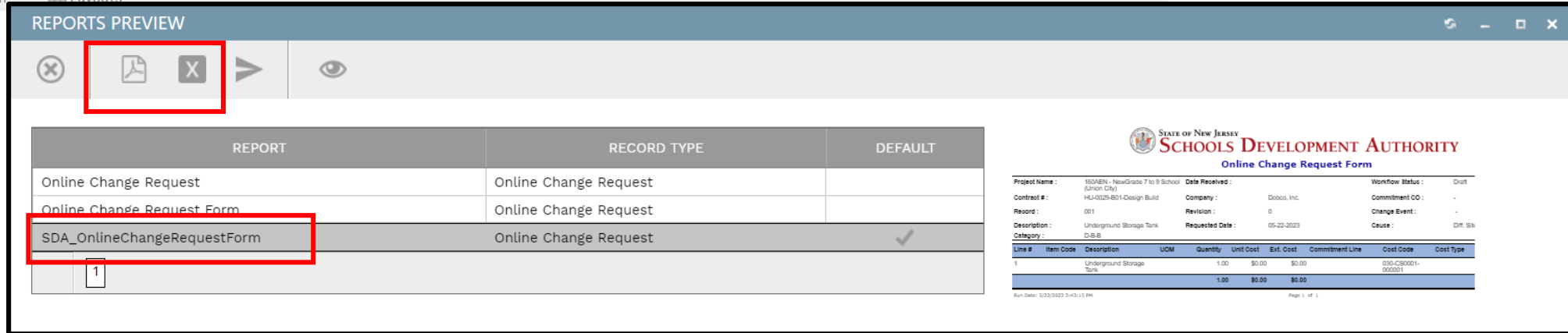
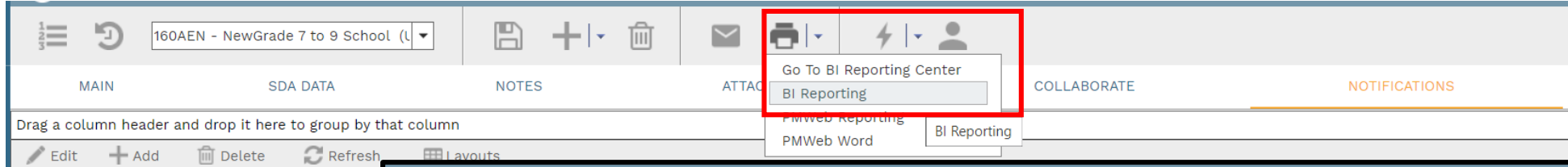
Enter your notes in the field provided. The text can be formatted using the toolbar shown. There is no limit to the amount of text you can enter. Click the **Save** button when completed.



On the **Attachments tab**, you can drag-and-drop your desired attachment(s) in the middle section of the screen, or you can choose **Add** to manually navigate to the location of your attachment on your computer, and add it through that window. Repeat the process for all additional attachments. Click the **Save** button when finished.



Additionally, a report should be printed for this phase of Change Management. Click the **printer icon** in the header section and select **BI Reporting**.



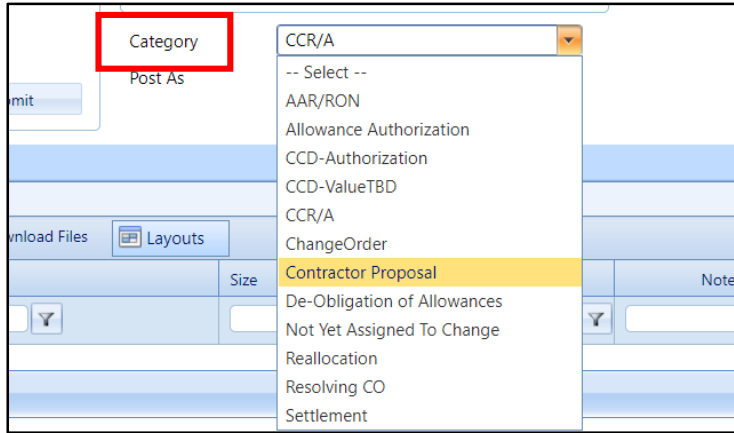
Select **SDA_Online Change Request Form**, then select **Print to PDF**. Save this report in a desired location. Return to the Attachments tab and add this report to your list of attachments.

Note: Please be patient when waiting for output from a selected report. It may take a few minutes to load the data.

Entering Subsequent Phases of Change Management

The process for each subsequent proposal document will follow these steps:

- Change the **Category** field in the header section (i.e., Contractor's Proposal, AAR [enter all rounds of negotiation])

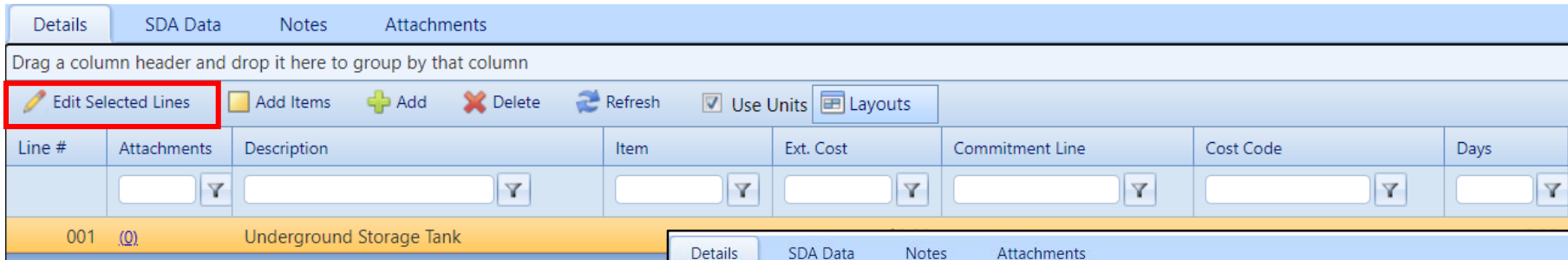


Category: CCR/A

-- Select --

- AAR/RON
- Allowance Authorization
- CCD-Authorization
- CCD-ValueTBD
- CCR/A
- ChangeOrder
- Contractor Proposal**
- De-Obligation of Allowances
- Not Yet Assigned To Change
- Reallocation
- Resolving CO
- Settlement

- Click the **Details** tab, select the line, and click **Edit Selected Lines** to enter the dollar value for that round of Change Management in the **Ext Cost** field. Click **Update Records** when completed.



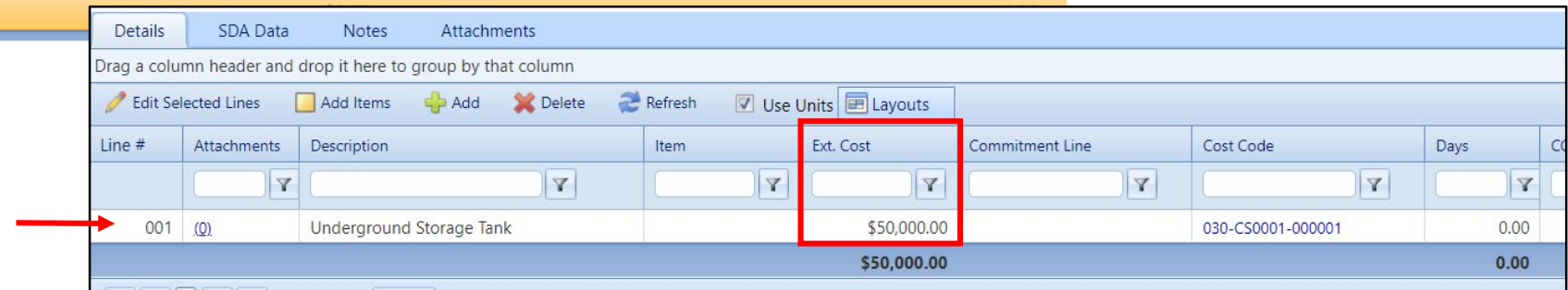
Details SDA Data Notes Attachments

Drag a column header and drop it here to group by that column

Edit Selected Lines Add Items Add Delete Refresh Use Units Layouts

Line #	Attachments	Description	Item	Ext. Cost	Commitment Line	Cost Code	Days
001	(Q)	Underground Storage Tank					

Note: More than one line of cost data may need to be entered, depending on the phase of change management and the requirements of your SDA Project Team. Contact your SDA Project Team for further clarification if needed.



Details SDA Data Notes Attachments

Drag a column header and drop it here to group by that column

Edit Selected Lines Add Items Add Delete Refresh Use Units Layouts

Line #	Attachments	Description	Item	Ext. Cost	Commitment Line	Cost Code	Days
001	(Q)	Underground Storage Tank		\$50,000.00		030-CS0001-000001	0.00
				\$50,000.00			0.00

- Click the Notes tab and click **Add** to enter notes for that round of Change Management.

Item	Description	Created By	Created Date	Edited By	Edited Date
001	Note 001	jirizarry	03-24-2021	jirizarry	03-24-2021

- Click the Attachments tab and enter backup documentation for that round of Change Management (see page 8 for instructions). Also, select **BI Reporting** from the printer icon in the Header section and print to PDF the **SDA_Online Change Request Form** and attach in this section.

Linked Line	ID	Description*	File*	Size	Revision/Version	Type	Notes

2770-080-03-1043 - 031043 - George L. Catrambone E.S. (formerly > Cost Management > Change Management > Online Change Requests

001 - 031043 - George L. Catrambone E.S. (formerly

Company: Terminal Construction Corp.
 Project*: 031043 - George L. Catrambone E.
 Commitment*: ET-0068-C01 - Construction

Requested: 03-24-2021
 Date Received: []

Change Request Recap
 Original Value: \$27,500,000.00
 Approved: \$55,550,000.00

School Name: []
 PMFCM: Select...
 District Name: []



Creating a Final Change Order

When all preliminary phases of Change Management are complete, a final Change Order can be created. Change the **Category** field in the Header section to **Change Order**. Click the **Save** button to continue.

A screenshot of a web application interface. At the top, there is a 'Submit' button. Below it, a 'Category' dropdown menu is open, showing a list of options: '-- Select --', 'AAR/RON', 'Allowance Authorization', 'CCD-Authorization', 'CCD-ValueTBD', 'CCR/A', 'ChangeOrder', and 'Contractor Proposal'. The 'ChangeOrder' option is highlighted in yellow, and a red arrow points to it from the left. The background shows a 'Workflow' tab and a text area with the text 'Approval Request: Online Change Requests 001' and 'has been Submitted for approval by'.

Click the **Workflow** tab and click the **Submit** button. This document will be reviewed for correctness prior to the creation of the Change Order. Those parties involved in the workflow review are established on a project-by-project basis. Add **Comments** as needed and click the **Save** button. Individuals who are part of the workflow approval will receive a notification to log in the system and review the workflow for approval.

A screenshot of the 'Workflow Actions' panel in a web application. The panel has a blue header with tabs for 'Details', 'SDA Data', 'Notes', 'Attachments', and 'Workflow'. The 'Workflow' tab is selected. Below the header, there are several sections: 'Actions' with a 'Submit' button, 'Email Preview' with fields for 'Subject' and 'Email Body', 'Comments', and 'Instructions'. A 'Save' button is highlighted with a red box. Below the 'Save' button is a 'Cancel' button. To the right, there is a 'Workflow Document Information' section with the following text: '- Document type: Online Change Requests' and '- Project Name: 130ACL - Camden H.S.'. Below this is an 'Add CC' field. A red arrow points to the 'Comments' field, which is currently empty.

When the **Workflow Status** field has a status of Approved, the Change Order can be created. Select **Generate Change Order** from the **Generate** drop-down box in the toolbar.

The screenshot shows a software interface with a toolbar at the top. A red box highlights the 'Generate...' dropdown menu, which is open and shows two options: 'Generate Change Event' and 'Generate Change Order'. The 'Generate Change Order' option is highlighted in yellow. Below the toolbar, the 'Workflow Status' field is set to 'Approved' and is indicated by a red arrow. Other fields include Company (Catcord Construction Co., Inc.), Project (130ACL - Camden H.S.), Description (Underground Storage Tank), and Cause (Diff. Site Conditions). The 'Requested' section shows a date of 03-25-2021 and a description of 'Discovered underground storage tanks, need to remove'. The 'Costs' section shows values for Original Value, Approved Changes, Revised Value, and This Request.

Review the information and click the **Save** button to continue.

The screenshot shows the 'Generate Commitment Change Order' dialog box. The 'Save' button is highlighted in a red box. The dialog contains the following fields: Company (Catcord Construction Co., Inc.), Project (0680-030-13-0ACL - 130ACL), Commitment (CA-0022-C02 - Construction), Description (Underground Storage Tank), Reference, Record # (001), Type, Category (ChangeOrder), and Post As (Revised Scope). Below these fields is a table titled 'Select Lines to Link' with the following data:

<input checked="" type="checkbox"/>	Line #	Item	Description	UOM	Quantity	Currency	Unit Cost
<input checked="" type="checkbox"/>	001		Underground Stora		1.00	USD	\$0.00

At the bottom of the dialog, there are navigation buttons and a 'Page Size' dropdown set to 5.

The Final Change Order displays in the **Commitment Change Order** module. In the Header section, complete the Cause, Requested By and Assigned To fields, then click the **Save** button in the toolbar to continue. *Note: all remaining information should have been copied from the OCR, but please review all information listed. Notice also that this document is linked to the OCR document.*

2 - 130ACL - Camden H.S. - Underground Storage T.

Project* 130ACL - Camden H.S.

Commitment* CA-0022-C02 - Catcord Construction Co., Inc.

Company Catcord Construction Co., Inc.

Type Construction

Record #* 2

Description Underground Storage Tank

Post As Revised Scope

Revision 0 Date 03-25-2021

Workflow Status Draft

Change Request 001 - Underground Storage Tank

Cause Diff. Site Conditions

Requested By Select Company

Category ChangeOrder

Reference

Assigned To Select Company

Change Order Date 03-25-2021

Execution Date

Days 0.00

Recap

		Days
Original Commitment Amount	\$480,049.00	0.00
Prior Approved Changes	\$-172,931.24	0.00
Prior Revised Contract	\$307,117.76	0.00
Total of This Change	\$75,000.00	0.00
Contract to This Change	\$382,117.76	0.00

CEO Review Req'd

Board Review Req'd

CEO Review Date

Board Review Date

Send to SIMS

VP Approval

Click the **Workflow** tab and click the **Submit** button. Add **Comments** as needed and click the **Save** button. Individuals who are part of the workflow approval will receive a notification to log in the system and review the workflow for approval. After the workflow has received final approval, the SDA's internal Central Processing Unit group will complete the processing of the Final Change Order.

Details SDA Data Notes Attachments Workflow

Workflow Actions

Actions

Submit

Email Preview

Subject

Email Body

Add CC

Comments

Details SDA Data Notes Attachments Workflow

Workflow Actions

Actions

Save

Cancel

Email Preview

Subject PMWeb Approval Request: Online Change Requests 001

Email Body

A document has been Submitted for approval by Jennifer Irizarry.

Workflow Document Information:

- Document type: Online Change Requests
- Project Name: 130ACL - Camden H.S.

Add CC

Comments