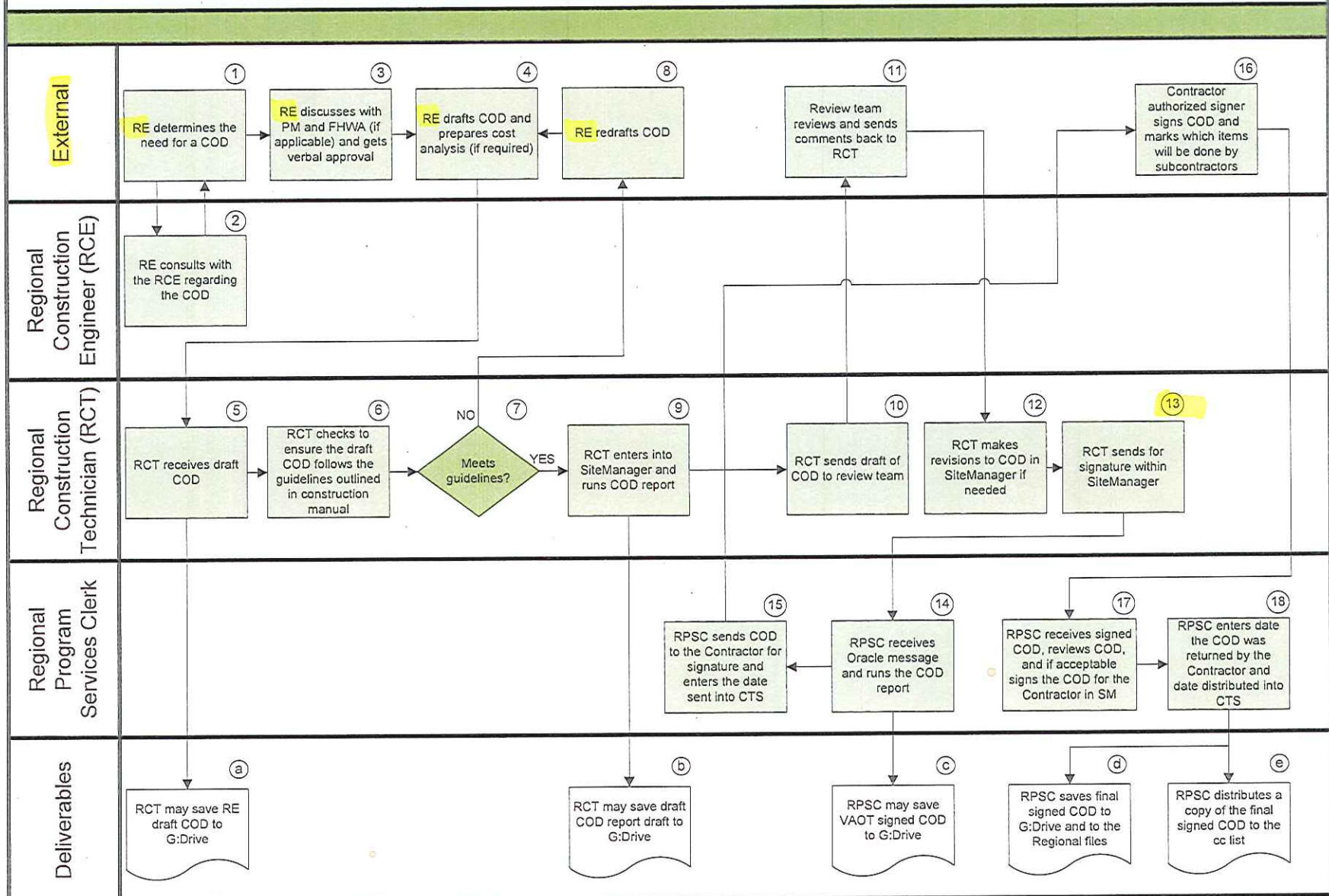


} Tab 5 }

# Change of Design Process



## Change of Design Process

### Work Instructions

Revision Date: March 20, 2013  
Revision No: 2  
Author: NE Region

Process Steps	Available Step Aides	Key Activities	Points of Interest
1. Resident Engineer (RE) determines the need for Change of Design (COD)		RE determines the need for COD	
2. Resident Engineer (RE) consults with Regional Construction Engineer (RCE) regarding Change of Design (COD)		RE consults with RCE regarding COD	
3. Resident Engineer (RE) discusses with Project Manager (PM) and Federal Highway Administration (FHWA) (if applicable) and gets verbal approval		RE discusses with PM and FHWA (if applicable) and gets verbal approval	There will be a signature block for FHWA on the plan set if they have direct oversight and will need to sign the COD
4. Resident Engineer (RE) drafts Change of Design (COD) and prepares cost analysis (if required)		RE drafts COD and if there are any added items will prepare cost analysis. The RE will use the COD template and the cost analysis form located on the field form CD as well on the G:Drive	the RE will work with the Prime Contractor and any other affected parties while developing the COD and the cost analysis; a cost analysis is only required for new (added) items
5. Regional Construction Technician (RCT) receives draft Change of Design (COD)		RCT receives draft COD	
6. Regional Construction Technician (RCT) checks to ensure the draft Change of Design (COD) follows the guidelines outlined in Construction Manual		RCT checks to ensure the draft Change of Design (COD) follows the guidelines outlined in Section IX of the Construction Manual	
7. Meets guidelines?		If No, got to Step 8 If Yes, go to Step 9	-- Minor issues with the Change of Design (COD) such as: spelling and grammar will be addressed by the Regional Construction Technician (RCT) -- Major issues with the Change of Design (COD) will be returned to the Resident Engineer (RE) for revisions
8. Resident Engineer (RE) redrafts Change of Design (COD)		RE redrafts COD or cost analysis depending upon which document needed revisions or clarifications	



**Change of Design Process**  
**Work Instructions**

Revision Date: March 20, 2013  
Revision No: 2  
Author: NE Region

Process Steps (cont'd)	Available Step Aides	Key Activities	Points of Interest
9. Regional Construction Technician (RCT) enters into SiteManager and runs Change of Design (COD) report	CODP1 CODP2	RCT enters into SiteManager and runs COD report	
10. Regional Construction Technician (RCT) sends draft of Change of Design (COD) to review team		RCT sends draft of COD to the review team for review and comments via email	--Review team is given 5 working days to respond --Mention of the assigned reason code should be included in the email to the review team
11. Review team reviews and sends comments back to Regional Construction Technician (RCT)		Review team reviews and makes comments sends back to RCT with a cc to the rest of the review team	
12. Regional Construction Technician (RCT) makes revisions to the Change of Design (COD) in SiteManager if needed	CODP1	RCT makes revisions to the COD in SiteManager if needed	Significant changes to the content of the COD may warrant a second round review period for the review team. This is at the discretion of the RCT
13. Regional Construction Technician (RCT) sends for signature within SiteManager	CODP3	RCT sends for signature within SiteManager	
14. Regional Program Services Clerk (RPSC) receives Oracle message and runs the Change of Design (COD) report	CODP2	RPSC receives Oracle message and runs the COD report	The COD will be sent via email with the following statement --- <i>Please have the attached Change of Design (COD) signed by the appropriate contractor personnel and return signed as a PDF File for further processing. If any of the work is and/or was being performed by a subcontractor please indicate so by checking the appropriate box on the document</i>
15. Regional Program Services Clerk (RPSC) sends COD to the Contractor for signature and enters the date sent into Construction Tracking System (CTS)	CODP5	RPSC sends COD to the Contractor for signature and enters the date sent into CTS	
16. Contractor authorized signer signs Change of Design (COD) and marks which items will be done by subcontractors		Contractor authorized signer signs COD and marks which items will be done by subcontractors	The authorized signors will be listed on the "Certificate of Resolution" found in the front of the contract -The authorized signor information can now be found in the Construction Tracking System (CTS) Contractor's tab as well

**Change of Design Process**  
**Work Instructions**

Revision Date: March 20, 2013  
Revision No: 2  
Author: NE Region

Process Steps (cont'd)	Available Step Aides	Key Activities	Points of Interest
17. Regional Program Services Clerk (RPSC) receives signed COD, reviews COD and if acceptable signs the COD for the Contractor in SiteManager (SM)	CODP4	RPSC receives signed COD from contractor (usually by email in PDF format, but may arrive via USPS) and checks to make sure it has not been altered and proper signatures obtained then will sign the COD in SM for the Contractor.	
18. Regional Program Services Clerk (RPSC) enters date the COD was returned by the Contractor and date distributed, into Construction Tracking System (CTS)	CODP5	RPSC enters date the COD was returned by the Contractor and date distributed, into CTS	
Deliverables	Available Step Aides	Key Activities	Points of Interest
a. Regional Construction Technician (RCT) may save the Resident Engineer's (RE) draft Change of Design (COD) to the G:Drive		RCT may save the RE draft COD to the G:Drive	"RE Draft" should be added to the file name if saved to the G:Drive
b. Regional Construction Technician (RCT) may save the draft Change of Design (COD) report the to G:Drive		RCT may save the draft COD report the to G:Drive	"Draft" should be added to the file name if saved to the G:Drive
c. Regional Program Services Clerk (RPSC) may save Vermont Agency of Transportation (VAOT) signed COD to G:Drive		RPSC may save VAOT signed COD to G:Drive	"Final Signed" should be added to the file name when saved to the G:Drive
d. Regional Program Services Clerk (RPSC) saves final signed Change of Design (COD) to G:Drive		RPSC saves final signed COD to G:Drive	
e. Regional Program Services Clerk (RPSC) distributes a copy of the final signed COD to the cc list		RPSC distributes a copy of the final signed COD to the cc list	The cc list includes Contract Administration, Financial Operations, Construction Executive Assistant, Resident Engineer, Materials & Research, the Project Manager, the QA Unit, FHWA if they have oversight, and Civil Rights if any items are checked off as being done by a subcontractor



**Vermont Agency of Transportation  
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Construction Section**

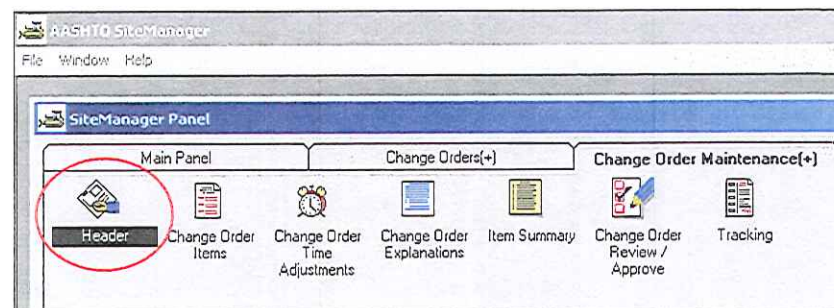
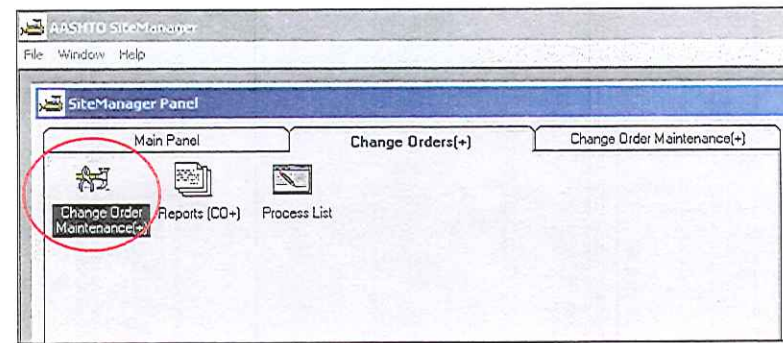
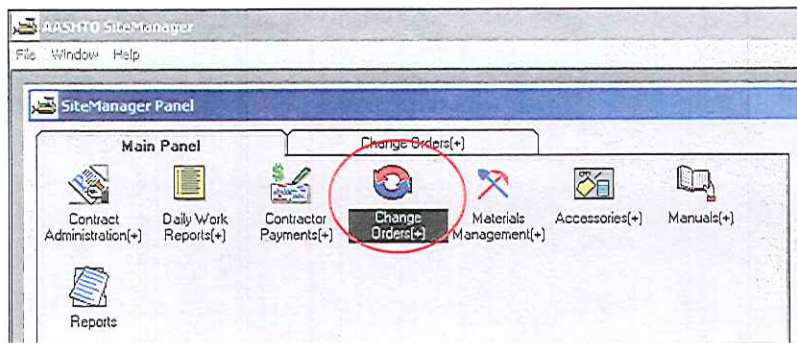
**Instructional Sheet: CODP1 – How to Enter a Change of Design (COD) into SiteManager (SM)**

**Revision Date:** April 19, 2012

**Revision No:** 1

**Author:** NE Region

1. Log into SiteManager: User Name & Password
2. Navigate to the Change Orders screen: Main Panel → Change Orders(+) → Change Order Maintenance(+) → Header



Any issues encountered with SiteManager, including passwords & logins, should be reported to the Construction Section Computer Technician (CSCT) in Headquarters and Stephen Gilbert, with a cc to the appropriate Regional Construction Technician (RCT)

Vermont Agency of Transportation  
Program Development Division  
Construction Section

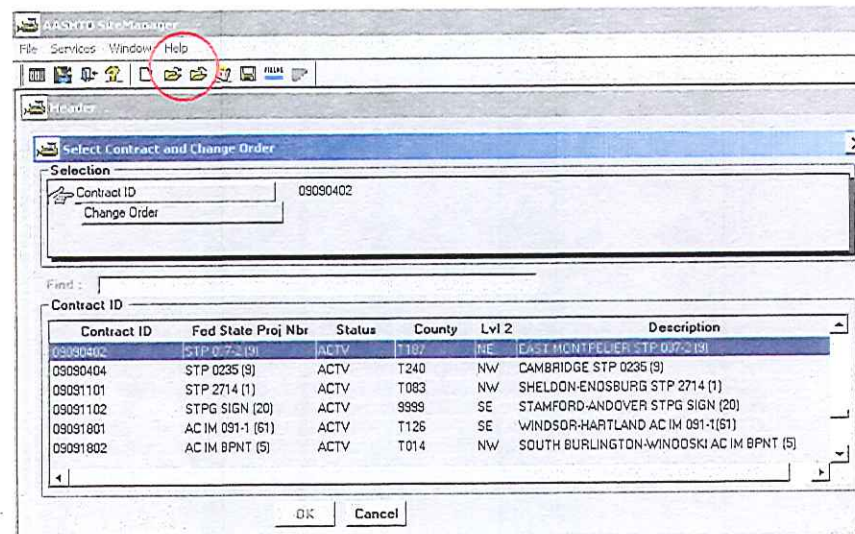
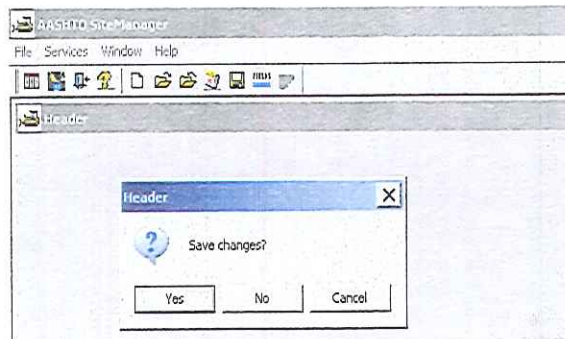
**Instructional Sheet:** CODP1 – How to Enter a Change of Design (COD) into SiteManager (SM)

**Revision Date:** April 19, 2012

**Revision No:** 1

**Author:** NE Region

- When you click on the Change Order Header icon the system will automatically open a Change of Design and you will be prompted to save changes to the Change of Design. You will always click "**No**" at this point when prompted to save changes.
- Click on the **Open File** icon on the toolbar and select the proper contract from the contract list.



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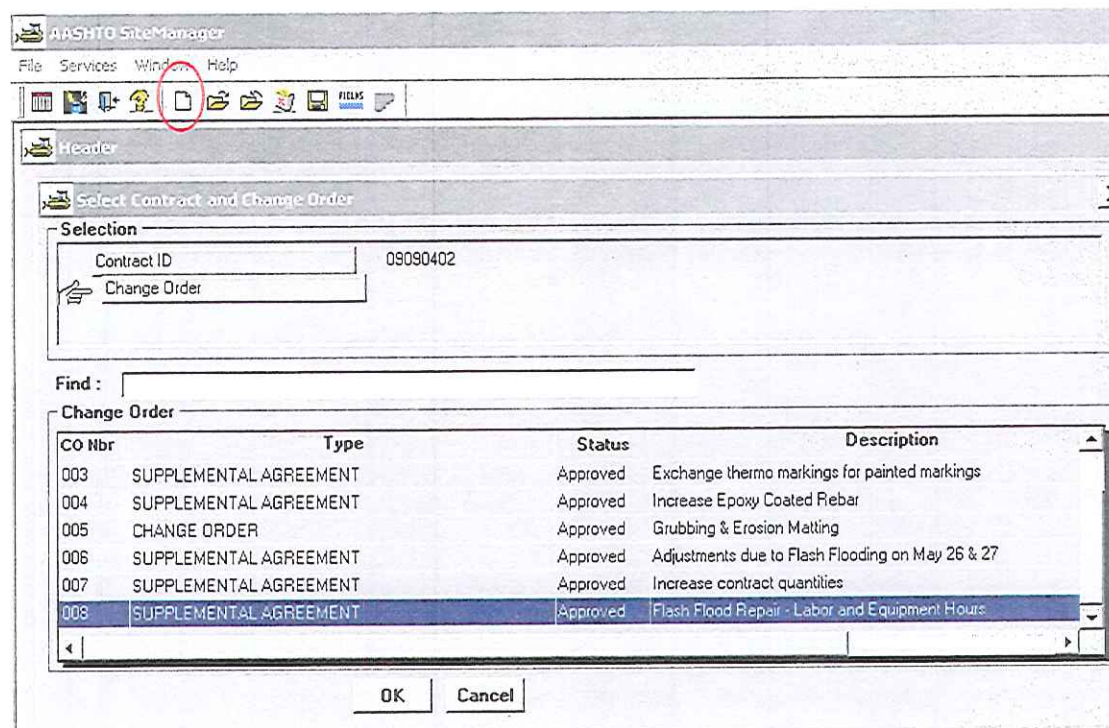
**Instructional Sheet:** CODP1 – How to Enter a Change of Design (COD) into SiteManager (SM)

**Revision Date:** April 19, 2012

**Revision No:** 1

**Author:** NE Region

5. After you choose a contract, the list of previously completed Changes of Design will open.
6. Choose the last Change of Design on the list.
7. Once open, click the **New** icon on the toolbar.

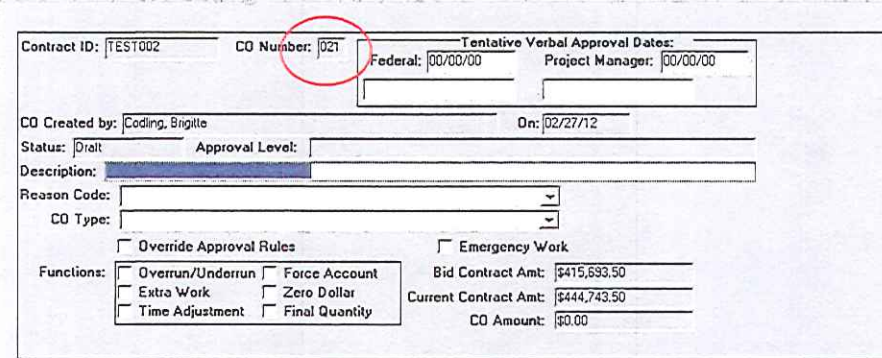




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Program Development Division  
Construction Section

**Instructional Sheet:** CODP1 – How to Enter a Change of Design (COD) into SiteManager (SM)  
**Revision Date:** April 19, 2012  
**Revision No:** 1  
**Author:** NE Region

8. A blank Change of Design will open and will automatically be assigned the next sequential Change of Design Number (i.e. 021).



Contract ID: TEST002 CO Number: 021

Tentative Verbal Approval Dates:  
Federal: 00/00/00 Project Manager: 00/00/00

CO Created by: Coding, Brigitte On: 02/27/12

Status: Draft Approval Level:

Description:

Reason Code:

CO Type:

☐ Override Approval Rules ☐ Emergency Work

Functions: ☐ Overrun/Underrun ☐ Force Account ☐ Extra Work ☐ Zero Dollar ☐ Time Adjustment ☐ Final Quantity

Bid Contract Amt: \$415,693.50  
Current Contract Amt: \$444,743.50  
CO Amount: \$0.00

9. Enter the Project Manager's name and the date of verbal approval.
10. Enter the Federal (FHWA) Official's name and date of verbal approval (if applicable, otherwise enter N/A).
11. Enter a brief description of the Change of Design in the Description field.
12. Choose a Reason Code from the drop down list (guidance on reason codes can be found in Section IX of the Construction Manual).
13. Choose a CO Type from the drop down list
- Added items = Supplemental Agreement
  - Changes in Quantities = Change Order
  - Change only to Completion Date = Extension Agreement
  - Change that requires no change in monetary value \$ = Zero Dollar
  - **Do Not Use** – all other codes on list
14. Choose a Function(s) from the drop down list
- In(de)creased Existing Quantities = Overrun/Underrun
  - Adding New Items = Extra Work
  - Change in Completion Date = Time Adjustment
  - **Do Not Use** – Force Account, Zero Dollar, or Final Quantity codes
15. Do not use the "Emergency Work" toggle.

Vermont Agency of Transportation  
Program Development Division  
Construction Section

Instructional Sheet: CODP1 – How to Enter a Change of Design (COD) into SiteManager (SM)

Revision Date: April 19, 2012

Revision No: 1

Author: NE Region

16. To increase or decrease quantities for existing contract items: Click on Services → CO Items → Services → New CO Items

AASHTO SiteManager

File Services Window Help

Choose Keys Ctrl+Alt+K  
Generic Fields Ctrl+Alt+G

Attachments  
Process Status  
Calculate Change Order Ctrl+Shift+C  
Forward To... Ctrl+Shift+F  
CO Items Ctrl+Shift+I  
CO Time Adjustments Ctrl+Shift+M  
Change Order Tracking Ctrl+Shift+T

Contract ID: FST002 CD Number: 019

Tentative Verbal Approval Dates:  
Federal: 00/00/00 Project Manager: 00/00/00

CO Created by: Coding, Brigitte On: 01/23/07

Status: Draft Approval Level: Construction Regional Engineer

Description: Test Change of Design

Reason Code: N/A

CO Type: CHANGE ORDER

Functions:  
☐ Override Approval Rules  
☒ Overrun/Underrun ☐ Force Account  
☐ Extra Work ☐ Zero Dollars  
☐ Time Adjustment ☐ Final Quantity

Bid Contract Amt: \$415,693.50  
Current Contract Amt: \$444,742.50  
CO Amount: \$2,600.00

AASHTO SiteManager

File Edit Services Window Help

Choose Keys Ctrl+Alt+K  
Remarks Ctrl+Alt+R  
Generic Fields Ctrl+Alt+G

Change  
Process Status  
New CO Item Ctrl+Shift+N  
Change Order Explanation [Ctrl+Shift+E] Ctrl+Shift+E

Cont: [ ] Project Nbr: [ ]

Line Item Nbr: [ ] Item Code: [ ]  
Unit: [ ] Unit Price: [ ]

Item and Supplemental Descriptions:

	Quantity	Amount
Contract Bid:	0.000	
Approved Change Order:	0.000	
Current Contract:	0.000	
Pending Change Order:	0.000	
This Change Order:	0.000	

☐ Force Account Item

Vermont Agency of Transportation  
Program Development Division  
Construction Section

**Instructional Sheet:** CODP1 – How to Enter a Change of Design (COD) into SiteManager (SM)

**Revision Date:** April 19, 2012

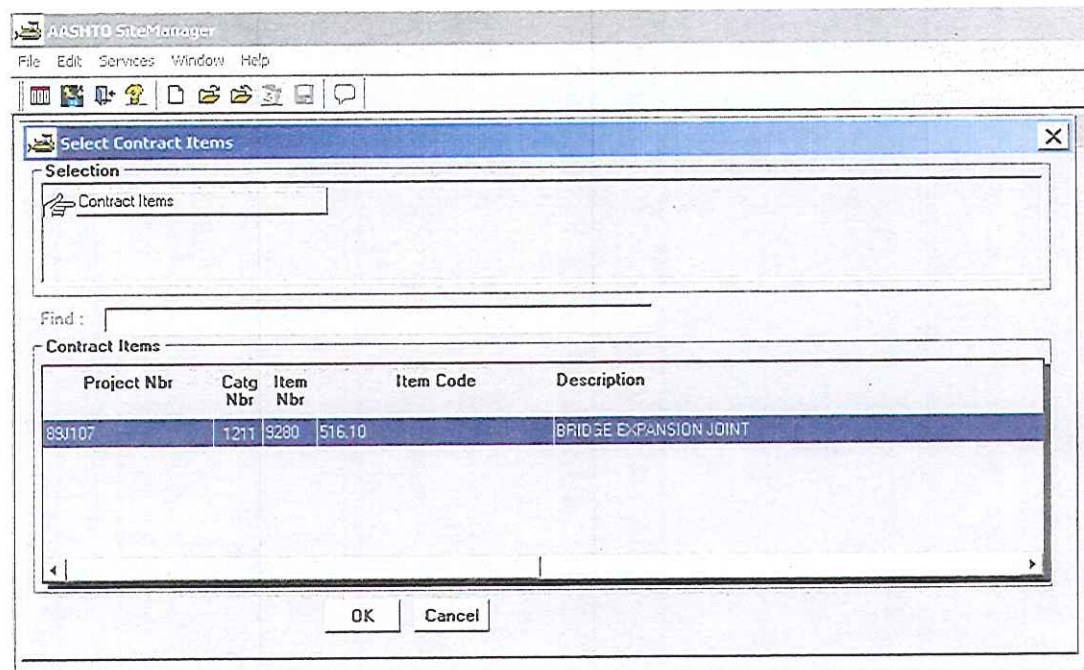
**Revision No:** 1

**Author:** NE Region

17. The contract item list will open.

18. Scroll through the list and choose the item from the contract item list that you want to increase or decrease the quantity for.

19. Click **OK**





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Program Development Division  
Construction Section

Instructional Sheet: CODP1 – How to Enter a Change of Design (COD) into SiteManager (SM)

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Revision No: 1

Author: NE Region

20. Enter a positive or negative number in the **This Change Order** field to increase or decrease the quantity

21. Click **Save**

AASHTO SiteManager

File Edit Services Window Help

Change Order Items

Change Order Item New Contract Item

Cont ID: TEST002 CO Nbr: 019 Project Nbr: 8SJ107

Line Item Nbr: 9280 Item Code: 516.10

Unit: LINEAR FEET Unit Price: \$200.00000

Item and Supplemental Descriptions:

BRIDGE EXPANSION JOINT

Joint

	Quantity	Amount
Contract Bid:	0.000	\$0.00
Approved Change Order:	30.000	\$6,000.00
Current Contract:	30.000	\$6,000.00
Pending Change Order:	0.000	\$0.00
This Change Order:	0.000	\$0.00

☐ Force Account Item

Vermont Agency of Transportation  
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Construction Section

**Instructional Sheet:** CODP1 – How to Enter a Change of Design (COD) into SiteManager (SM)

**Revision Date:** April 19, 2012

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22. To add **new** contract items: Click on Services → CO Items → Click on the New Contract Item tab

The screenshot shows the AASHTO SiteManager application window. The title bar reads 'AASHTO SiteManager'. The menu bar includes 'File', 'Edit', 'Services', 'Window', and 'Help'. Below the menu bar is a toolbar with various icons. The main window has two tabs: 'Change Order Item' and 'New Contract Item', with the latter being the active tab. Inside the 'New Contract Item' tab, there are several input fields and checkboxes. At the top, 'Contract ID:' is set to 'TEST002' and 'Change Order Nbr:' is set to '019'. Below this, there is a large rectangular area containing the following fields: 'Project Nbr:' (a dropdown menu), 'Category Nbr:' (a text field), 'Line Item Nbr:' (a text field), 'Item Code:' (a text field), 'Units Type:' (a text field), 'Spec Year:' (a text field), 'Description:' (a text field), 'Major Item:' (a checkbox), 'Specialty:' (a checkbox), 'Status Type:' (a text field), 'Unit Price:' (a text field with '\$0.00000' entered), 'Proposal Line Nbr:' (a text field), 'Related Item:' (a dropdown menu), 'Critical:' (a checkbox), 'Pay Plan Qty:' (a checkbox), 'Supply Desc Req'd:' (a checkbox), and 'Material Discrepancy Adj:' (a checkbox). At the bottom of this area is a section labeled 'Supplemental Descriptions:' with two empty text lines.

23. Click on the Project Nbr drop down and choose the contract's primary PIN number from the list (often there will be only one PIN)

24. If there is more than one PIN it is necessary to determine the proper primary PIN before populating the Project Nbr field

25. Choose the proper Category Nbr for the new item (this should be provided by the RE on the template)

26. Enter the next available 9000 line number for the project in the Line Item Nbr field (added items are assigned 9000 line numbers 9005, 9010, 9015 etc.,)

27. Click in the Item Code field and search for the desired item off the master item list

28. Do not use the Major Item or Specialty Item toggle boxes

29. Enter the unit price for the item

30. Enter the Proposal Line Nbr, this number should always match what you entered in the Line Item Nbr field

31. Do not use the Related Items field or the Critical, Pay Plan Quantity, and Material Discrepancy Adj toggle boxes

32. Enter a supplemental item description in the Supplemental Description field; both fields can be used for this purpose if needed

**Vermont Agency of Transportation  
Program Development Division  
Construction Section**

**Instructional Sheet: CODP1 – How to Enter a Change of Design (COD) into SiteManager (SM)**

**Revision Date:** April 19, 2012

**Revision No:** 1

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33. Click **Save**
34. To change the Completion Date of the Contract: Click on Services → CO Time Adjustments
35. Don't forget to toggle the Time Adjustment function
36. The Time Order Time Adjustments screen will open
37. Enter the new Completion Date (the RE should provide this on the template)
38. Enter a brief explanation for the adjusted date in the Explanation field
39. Click **Save**

ASAMITO SiteManager

File Services Window Help

Change Keys Ctrl+Z/Ctrl+Y

Generic Fields Ctrl+W/Ctrl+G

Attachments

Process Status

Calculate Change Order Ctrl+O/Ctrl+M

**CO Items Ctrl+S/Ctrl+I**

CO Time Adjustments Ctrl+T/Ctrl+J

Change Order Tracking Ctrl+H/Ctrl+T

Contract ID: TEST002 CO Number: 019

Tentative Verbal Approval Dates:

Federal: 00/00/00 Project Manager: 00/00/00

CO Created by: Coding, Brigitte On: 01/23/07

Status: Draft Approval Level: Construction Regional Engineer

Description: Test Change of Design

Reason Code: N/A

CO Type: Design/Construction

Functions:

☒ Override Approval Rules ☐ Emergency Work

☐ Overrun/Underrun ☐ Force Account

☐ Extra Work ☐ Extra Material

☒ Time Adjustment ☐ Final Quantity

Bid Contract Amt: \$475,650.00

Current Contract Amt: \$444,743.50

CO Amount: \$2,000.00

Contract ID: TEST002 Change Order Nbr: 019

Adjusted Contract or Milestone	Adjustment Days	Adjustment Date	Explanation
Contract		00/00/00	

For Milestone: or Contract Completion

Time Adjustment Days: 0 Adjusted Completion Date: 00/00/00

Explanation:



Vermont Agency of Transportation  
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Instructional Sheet: CODP1 – How to Enter a Change of Design (COD) into SiteManager (SM)

Revision Date: April 19, 2012

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40. Once you have entered all components of the Change of Design
41. Navigate back to the Change of Design header then click Services → Calculate Change Order
42. The CO Amount field will populate with the net value of all monetary changes made
43. Click **Save**

The screenshot displays the AASHTO SiteManager application window. On the left, a menu is open with 'Calculate Change Order' highlighted. The main window shows a form for a Change Order (CO) with the following details:

- Contract ID: TEST002
- CO Number: 019
- Tentative Verbal Approval Dates: Federal: 00/00/00, Project Manager: 00/00/00
- CO Created by: Coding, Brigitte
- Status: Draft
- Approval Level: Construction Regional Engineer
- Description: Test Change of Design
- Reason Code: N/A
- CO Type: CHANGE ORDER
- Functions: ☐ Override Approval Rules, ☐ Emergency Work, ☐ Overrun/Underrun, ☐ Force Account, ☐ Extra Work, ☐ Zero Dollar, ☒ Time Adjustment, ☐ Final Quantity
- Bid Contract Amt: \$415,633.50
- Current Contract Amt: \$444,743.50
- CO Amount: \$0.00

Vermont Agency of Transportation  
Program Development Division  
Construction Section

**Instructional Sheet:** CODP1 – How to Enter a Change of Design (COD) into SiteManager (SM)

**Revision Date:** April 19, 2012

**Revision No:** 1

**Author:** NE Region

44. Next you will add Revision, Necessity for Revision, and New Item statements to the Change Order

45. Navigate to the Explanations page: Main Panel → Change Orders(+) → Change Order Maintenance(+) → Change Order Explanations

The image displays three screenshots of the AASHTO SiteManager software interface, specifically the 'Change Order Explanations' window. Each screenshot shows the same header information: Contract ID: TEST002, Change Order Nbr: 019, Status: DRAF.

**First Screenshot (Revision tab):** The 'Revision' dropdown is selected. The table below has columns: Seq. Nbr., Std CO Expl ID, Type, and Date Applied. Row 2 shows a revision of type 'REV' applied on 03/15/07. A text box at the bottom contains: 'Addition of the item 900.545 Supplemental Agreement (Concrete Grinding) to the contract.'

Seq. Nbr.	Std CO Expl ID	Type	Date Applied
2		REV	03/15/07

**Second Screenshot (Necessity For Revision tab):** The 'Necessity For Revision' dropdown is selected. The table has the same columns. Row 3 shows a general explanation of type 'GEN' applied on 03/15/07. A text box at the bottom contains: 'The contractor has asked to be compensated for grinding approximately three inches of the approach slab 1 (station 20+44 Rt.) corner down, due to an elevation error in the plans.'

Seq. Nbr.	Std CO Expl ID	Type	Date Applied
3		GEN	03/15/07

**Third Screenshot (New Items Not In Contract tab):** The 'New Items Not In Contract' dropdown is selected. The table has the same columns. Row 1 shows a new item of type 'ALL' added on 03/15/07. A text box at the bottom contains: '900.545 Supplemental Agreement (Concrete Grinding) One Thousand Eight Hundred Fifty Six Dollars and Twenty Five Cents (\$ 1,856.25) per Lump Sum. This item will be full reimbursement for all costs invoiced to the Frank W. Whitcomb Corp. from Vermont Concrete Cutting, Inc. for grinding the approach slab down to grade. Payment shall be Vermont Concrete Cutting's invoice plus 10 overhead and profit as allowed by this contract. See attached invoice.'

Seq. Nbr.	Std CO Expl ID	Type	Date Applied
1		ALL	03/15/07

46. The Revision statement should say which items were adjusted or added (see example above)

47. The Necessity for Revision statement should explain who, what, when, where, and why the change was made

48. The New Items Not in Contract statement should list the added items (see example above)

49. If there are no new (added) items then N/A should be entered into the New Items field

50. Use multiple sequence lines to add multiple paragraphs to the Change Order (do this by adding a new sequence line)

51. Click **Save**



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Program Development Division  
Construction Section**

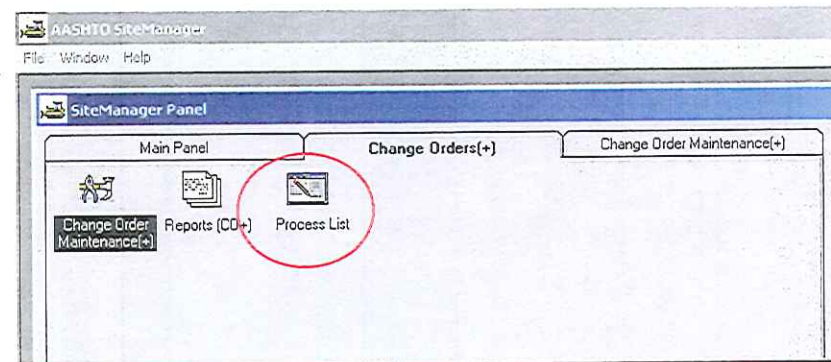
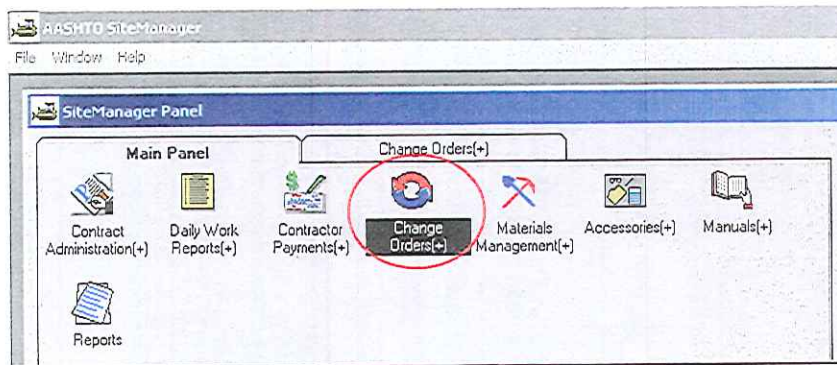
**Instructional Sheet: CODP2 – How to Run a Change of Design (COD) Report in SiteManager**

**Revision Date:** April 19, 2012

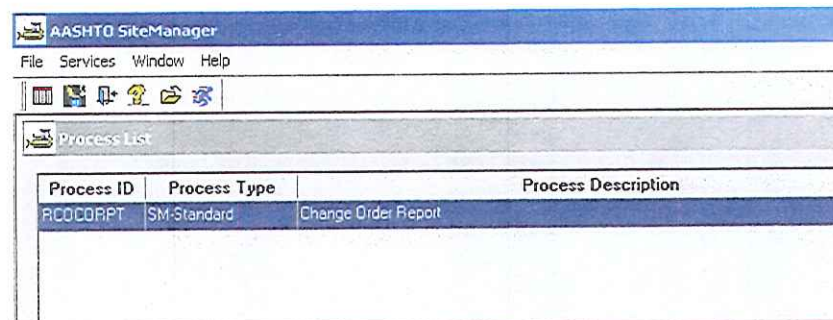
**Revision No:** 1

**Author:** NE Region

1. Log into SiteManager: User Name & Password
2. Navigate to the Change Orders screen: Main Panel → Change Orders(+) → Process List



3. Double click on Change Order Report





**Vermont Agency of Transportation  
Program Development Division  
Construction Section**

**Instructional Sheet: CODP2 – How to Run a Change of Design (COD) Report in SiteManager**

**Revision Date:** April 19, 2012

**Revision No:** 1

**Author:** NE Region

4. When the list opens (Confirm Process Submission window) choose the Contract and Change of Design Number you want to run a report for.
5. Click Submit (depending upon network speeds the Run Process may take a little while)
6. When the Client Job Monitor window appears Click OK
7. When the DPS Status Monitor window appears Click Ok

The screenshot shows the AASHTO SiteManager application window. The 'Process List' window is open, displaying a table of processes. The 'Confirm Process Submission' dialog box is overlaid on top of the 'Process List' window, showing a list of processes with columns for Contract ID, Fed St Prj Nbr, C O Nbr, C O Status, and Description. The process with Contract ID 00010701 and C O Nbr 003 is selected. The 'Submit' button is highlighted.

Process ID	Process Type	Process Description
RCOCORPT	SM-Standard	Change Order Report

Contract ID	Fed St Prj Nbr	C O Nbr	C O Status	Description
00010701	#BHF 028-4(22)	001	APPR	CONCORD BHF 028-4(22)
00010701	#BHF 028-4(22)	002	APPR	CONCORD BHF 028-4(22)
00010701	#BHF 028-4(22)	003	APPR	CONCORD BHF 028-4(22)
00011401	#BHS 0181(1)S	001	APPR	WEYBRIDGE #BHS 0181(1)S
00011401	#BHS 0181(1)S	002	APPR	WEYBRIDGE #BHS 0181(1)S
00011401	#BHS 0181(1)S	003	APPR	WEYBRIDGE #BHS 0181(1)S
00011402	BHF 025-1(39)S	001	APPR	CHESTER BHF 025-1(39)S (READVERTISED)
00011402	BHF 025-1(39)S	002	APPR	CHESTER BHF 025-1(39)S (READVERTISED)
00011402	BHF 025-1(39)S	003	APPR	CHESTER BHF 025-1(39)S (READVERTISED)
00012801	BRF 013-2(8)	001	APPR	LONDONDERRY AC BRF 013-2(8)
00012801	BRF 013-2(8)	002	APPR	LONDONDERRY AC BRF 013-2(8)

Buttons: Submit, Parameters, Cancel

The 'Client Job Monitor' dialog box displays the message: 'Process RCOCORPTB submitted.' with an 'OK' button.

The 'DPS Status Monitor' dialog box displays the message: 'Profile RCOCORPTA for process RCOCORPT has completed' with an 'OK' button.

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Program Development Division  
Construction Section

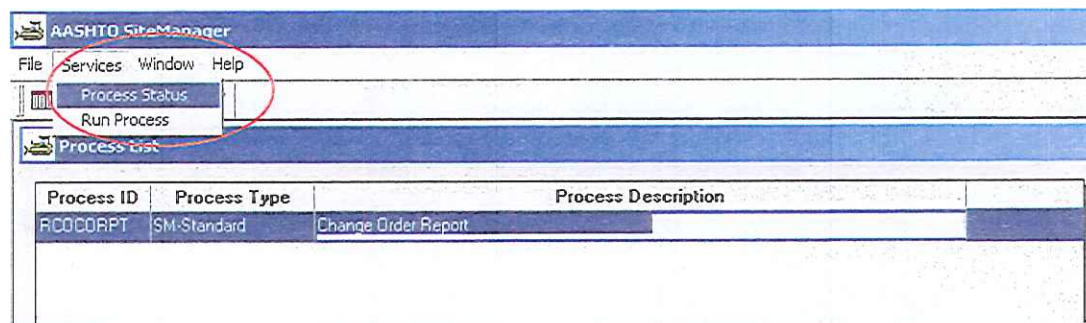
**Instructional Sheet:** CODP2 – How to Run a Change of Design (COD) Report in SiteManager

**Revision Date:** April 19, 2012

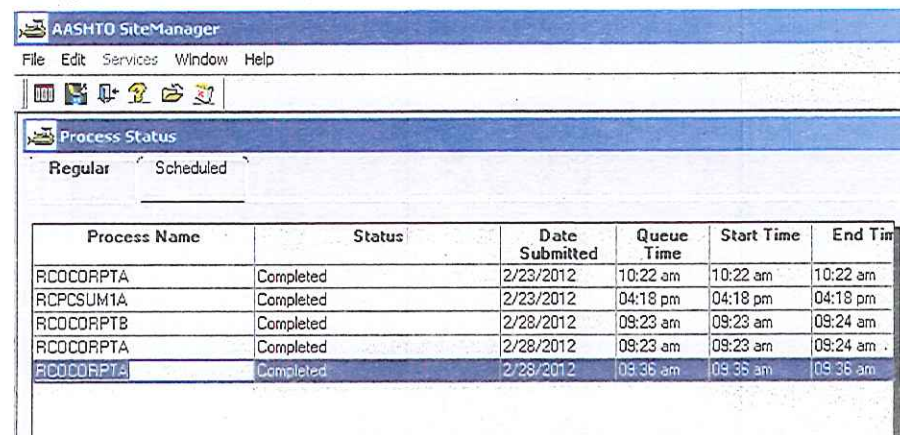
**Revision No:** 1

**Author:** NE Region

8. Click on Services → Process Status



9. Double click on the last report run (note date and time)



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Program Development Division  
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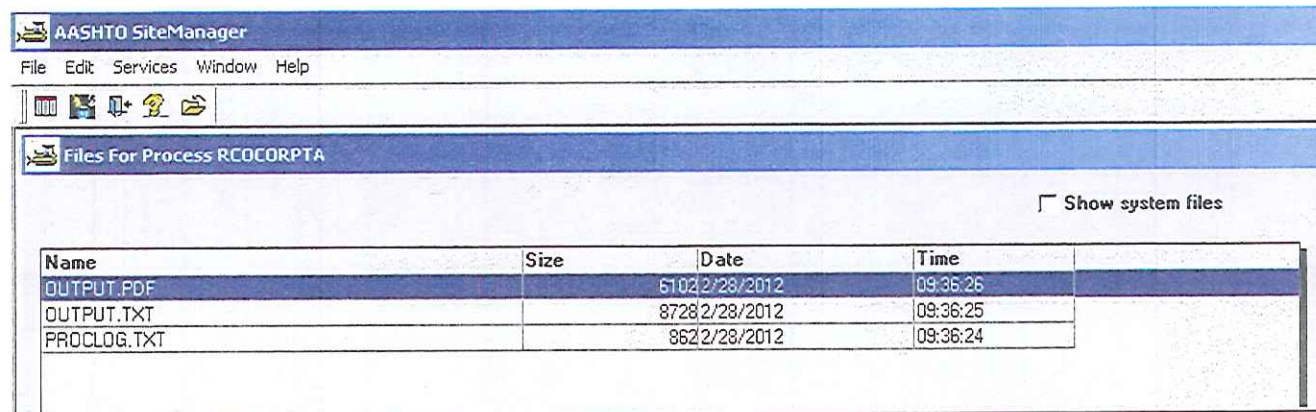
**Instructional Sheet:** CODP2 – How to Run a Change of Design (COD) Report in SiteManager

**Revision Date:** April 19, 2012

**Revision No:** 1

**Author:** NE Region

10. Three log files should appear (see below)
11. Double click on the OUTPUT.PDF file
12. If there is no OUTPUT.PDF file on the list, then there is a character issue within one of the explanation statements that will need to be fixed (see CODP1 step 44)



The screenshot shows the AASHTO SiteManager application window. The title bar reads 'AASHTO SiteManager'. The menu bar includes 'File', 'Edit', 'Services', 'Window', and 'Help'. Below the menu bar is a toolbar with several icons. The main window area is titled 'Files For Process RCOCORPTA'. In the top right corner of this area, there is a checkbox labeled 'Show system files' which is currently unchecked. Below this, there is a table listing files. The table has four columns: 'Name', 'Size', 'Date', and 'Time'. The first row is highlighted in blue and contains 'OUTPUT.PDF', an empty size field, '5/02/2/28/2012', and '09:36:26'. The second row contains 'OUTPUT.TXT', an empty size field, '8/28/2/28/2012', and '09:36:25'. The third row contains 'PROCLOG.TXT', an empty size field, '8/2/2/28/2012', and '09:36:24'.

Name	Size	Date	Time
OUTPUT.PDF		5/02/2/28/2012	09:36:26
OUTPUT.TXT		8/28/2/28/2012	09:36:25
PROCLOG.TXT		8/2/2/28/2012	09:36:24

13. The Change of Design will open in PDF format



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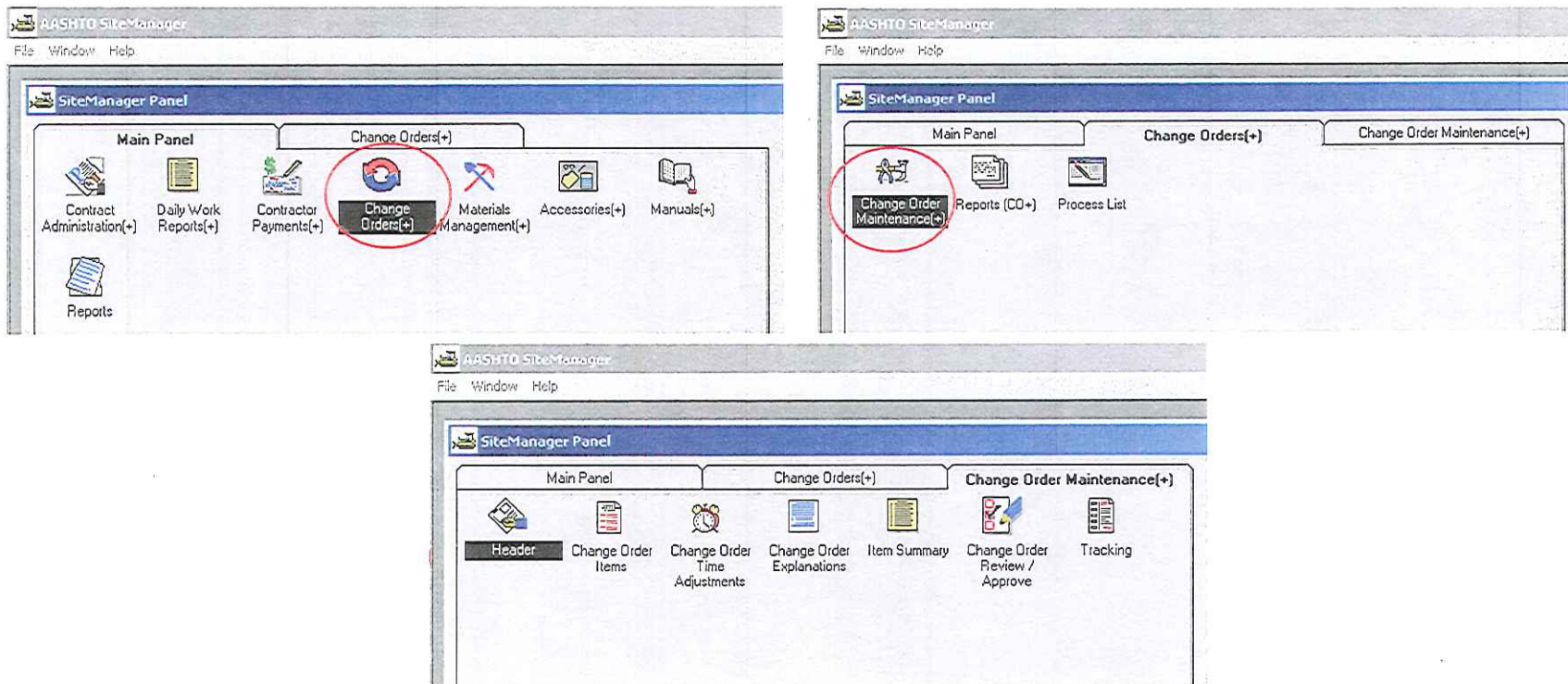
**Instructional Sheet:** CODP3 – How to Send a Change of Design (COD) for VAOT Signature within SiteManager

**Revision Date:** April 19, 2012

**Revision No:** 1

**Author:** NE Region

1. Log into SiteManager: User Name & Password
2. Navigate to the Change Orders screen: Main Panel → Change Orders(+) → Change Order Maintenance(+) → Header



Any issues encountered with SiteManager, including passwords & logins, should be reported to the Construction Section Computer Technician (CSCT) in Headquarters and Stephen Gilbert, with a cc to the appropriate Regional Construction Technician (RCT)

Vermont Agency of Transportation  
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**Instructional Sheet:** CODP3 – How to Send a Change of Design (COD) for VAOT Signature within SiteManager

**Revision Date:** April 19, 2012

**Revision No:** 1

**Author:** NE Region

3. Open the Change of Design ready for VAOT (electronic) signature and change the Status from Draft to Pending.
4. Click **Save**

Contract ID: TEST002 CO Number: 018

Tentative Verbal Approval Dates:  
Federal: 00/00/00 Project Manager: 02/28/12  
Joe Nobody

On: 07/13/05

CO Created by: Cody, Brigitte

Status: Pending (selected) Approval Level: Construction Project Managers

Description: Draft of Design

Reason: Pending

CO: [ ]

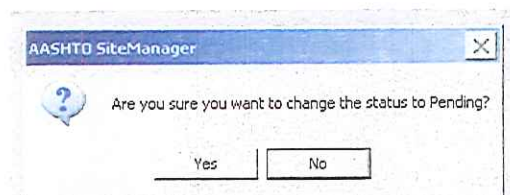
Approval Rules: [ ] Emergency Work

Function: [ ] Force Account Bid Contract Amt: \$415,693.50

Extra Work [ ] Zero Dollar Current Contract Amt: \$444,743.50

Time Adjustment [ ] Final Quantity CO Amount: \$640.00

5. A confirmation prompt window will appear → Click Yes



**Vermont Agency of Transportation  
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**Instructional Sheet:** CODP3 – How to Send a Change of Design (COD) for VAOT Signature within SiteManager

**Revision Date:** April 19, 2012

**Revision No:** 1

**Author:** NE Region

6. The *Groups for Approval* screen will open
7. For each approval group automatically assigned to the Change of Design, "Add" the appropriate VAOT staff related to the contract
8. Construction Inspector = Resident Engineer (RE)
9. Construction Regional Engineer, Construction Engineer, Director of Program Development, & Federal (are self explanatory)
10. Contractor = Regional Program Services Clerk (for the Contractor)
11. Once all approval groups have a name associated to them → Click **OK**

User ID	User Name
cachille	Achilles, Chris
tchase	Chase, Thomas
achurch	Church, Allison
bcodling	Codling, Brigitte
pdessure	Dessureau, Philip



12. The system will report that the Oracle process "Mail Sent" has been initiated → Click **OK**
13. Each approver will receive an Oracle email message telling them it's their turn to "sign" the Change of Design
14. Once the final VAOT approver signs the Change of Design the Regional Program Services Clerk will get the final Oracle message which lets them know they can send the Change of Design to the Contractor for their signature.



**Vermont Agency of Transportation  
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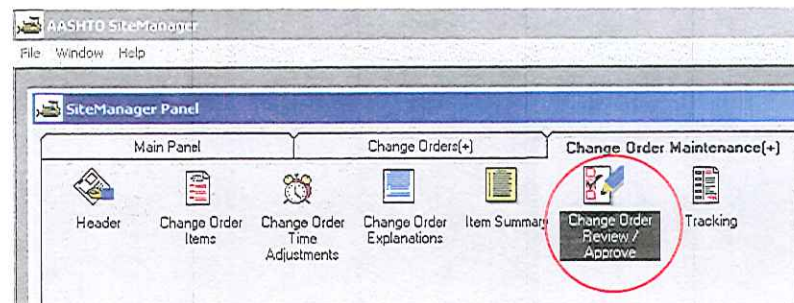
**Instructional Sheet: CODP4 – How Approve or Deny a Change of Design (COD) within SiteManager**

**Revision Date:** April 19, 2012

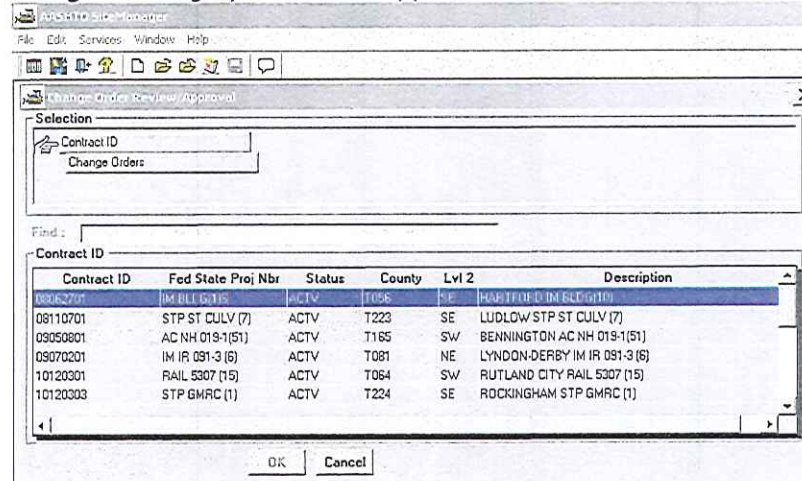
**Revision No:** 1

**Author:** NE Region

1. Log into SiteManager: User Name & Password
2. Navigate to the Approval screen: Main Panel → Change Orders(+) → Change Order Maintenance → Change Order Review and Approve



3. Choose the Contract and the Change of Design you want to approve → Click **OK**



Vermont Agency of Transportation  
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**Instructional Sheet:** CODP4 – How Approve or Deny a Change of Design (COD) within SiteManager

**Revision Date:** April 19, 2012

**Revision No:** 1

**Author:** NE Region

4. The Change Order Approval screen will open

CO Nbr	Type	Status	Description
001	SUPPLEMENTAL AGREEMENT	Draft	Redesign/move sewer line away from existing water line
014	SUPPLEMENTAL AGREEMENT	Pending	Add Item 900.545 SA (Administrative Settlement) to the contr

5. To approve the Change of Design → Click Approved  
6. To deny the Change of Design → Click Denied

**Vermont Agency of Transportation  
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Construction Section**

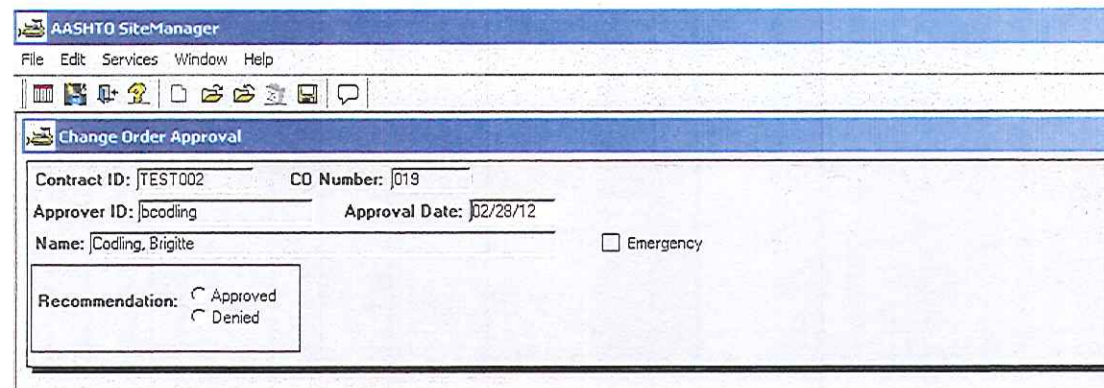
**Instructional Sheet:** CODP4 – How Approve or Deny a Change of Design (COD) within SiteManager

**Revision Date:** April 19, 2012

**Revision No:** 1

**Author:** NE Region

7. Then notify the appropriate Regional Technician that the Change of Design was denied



The screenshot shows the AASHTO SiteManager application window. The title bar reads "AASHTO SiteManager". Below the menu bar (File, Edit, Services, Window, Help) is a toolbar with various icons. The main content area is titled "Change Order Approval". It contains the following fields and controls:

- Contract ID: TEST002
- CO Number: 019
- Approver ID: bcodling
- Approval Date: 02/28/12
- Name: Codling, Brigitte
- ☐ Emergency
- Recommendation: ☐ Approved ☐ Denied

-Any issues encountered with Construction Tracking System (CTS), including passwords & logins, should be reported to the Construction Section Computer Technician (CSCT) in Headquarters and Laurie Bean, with a cc to the appropriate Regional Construction Technician (RCT)



**Vermont Agency of Transportation  
Program Development Division  
Construction Section**

**Instructional Sheet:** CODP5 – How to enter Change of Design (COD) related dates into Construction Tracking System (CTS)

**Revision Date:** April 19, 2012

**Revision No:** 1

**Author:** NE Region

1. Log in to CTS
2. Click on "Contract"
3. Click on Find Contract (highlighted in yellow) and choose appropriate project
4. Click on "CO" tab (located second box over from FIND CONTRACT)

The screenshot shows the 'Construction Tracking System - [Contracts]' window. The 'Find contract' button is highlighted in yellow. The 'CO' tab is highlighted in red. The interface includes a menu bar (File, Edit, Records, Window, Help) and a toolbar with icons for various functions. Below the toolbar, there are tabs for 'Contract Information', 'Claims', 'CO', and 'Employees'. The 'Contract Information' tab is active, displaying fields for 'DES number' (00010701), 'Contract' (CONCORD BHF 028-4(22)), 'Contract A, I, C, or F' (F), 'Lead Project' (CONCORD BHF 028-4(22)), 'Contractor' (BECK & BELLUCCI INC.), 'Resident Eng.' (RCLARK), and 'Region' (NE). Below these fields, there are tabs for 'Projects', 'Field Office', 'Contractor', 'Schedules', 'Milestones', 'Costs (\$)', 'Ratings', 'Project Records', 'Extension of time', and 'Finals'. The 'Projects' tab is active, showing a table of projects in this contract.

Projects in this contract			
938067	CONCORD	BHF 028-4(22)	Open

**Vermont Agency of Transportation  
Program Development Division  
Construction Section**

**Instructional Sheet: CODP5 – How to enter Change of Design (COD) related dates into Construction Tracking System (CTS)**

**Revision Date:** April 19, 2012

**Revision No:** 1

**Author:** NE Region

5. Tab to "Regional Clerk sent to Contractor" date field and enter the actual date the COD was sent and click save

Entered by Regional Clerk)

CES number: 00010701 Contract: CONCORD BHF 028-4(22)

	Name	Date	Req		
Change in Design number:	001	(SM)	Resident Engineer		(SM)
Change in Design Amount:	\$16,040.00	(SM)	Regional Engineer		(SM)
Status:	APPR	(SM)	Construction Engineer		(SM)
Change in Design Date:	2/28/2000	(SM)	Director		(SM)
Federal Oversight:		(SM)	FHWA		(SM)
			Regional Clerk sent to Contractor		
			Regional Clerk received from Contractor		
			Site Manager approval for Contractor	Inoyes	6/2/2000 (SM)
			Distributed:	3/30/2000	

Necessity For Revision (SM)

6. When COD/Supplement Agreement (SA) is returned signed by Contractor follow steps 1 through 3 above
7. Tab to "Regional Clerk received from Contractor" date field and enter the actual date (if not distributing at this point click on the save button)
8. Tab to "Distributed" date field and enter the actual date you distribute the COD and click on the save button located in the upper left hand corner of the screen.

Any issues encountered with Construction Tracking System (CTS), including passwords & logins, should be reported to the Construction Section Computer Technician (CSCT) in Headquarters and Laurie Bean, with a cc to the appropriate Regional Construction Technician (RCT)