Oracle
Textura Payment Management
Subcontractor Change Order Management

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Primary Author: Oracle Corporation

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Change Order Management

A General Contractor creates a change order to change the value of your contract on the application. Once created, the application sends an email to all Project Managers in your organization working on the project to inform them they need to allocate the change order.

Modify your budget on the **Allocate Change Order** page. The **Allocate Change Order** page shows one change order at a time. If you have more than one change order to allocate, save the allocations for the first change order to see the next change order display on the page.

If you are a Prime Subcontractor with Sub-Tiers working for you on a project and the Sub-Tier holds a contract and enters their billing information on TPM, you can create a Sub-Tier change to change their contract value. For more information on acting as a Prime Subcontractor, see ***Sub-Tier Change Order Management for Prime Subcontractors***.

Your Change Orders

Change orders adjust the value of your organization's contract value on TPM. These are displayed on the **My Change Orders** tab and are created by the General Contractor organization.

High-Level Overview

If your General Contractor does not use the **Specified SoV** setting, you will complete the following workflow:

1) The General Contractor creates a change order to adjust your contract value.
2) As a Project Manager, when you next log in and navigate to the **Project Home** page, you will see an **Edit Schedule of Values** task.

   At this time, the Schedule of Values is out of balance because the new change order needs to be allocated. It will remain out of balance until you allocate the change order.
3) Select the **Edit Schedule of Values** task to go to the **Allocate Change Order** page.
4) Either ***allocate the change order to an existing line item or create a new line item*** in your SoV. Enter the change order amount in the **Allocate** column and save your changes.

FAQs

What happens to my usage fee when I have a variation? (see page 11)

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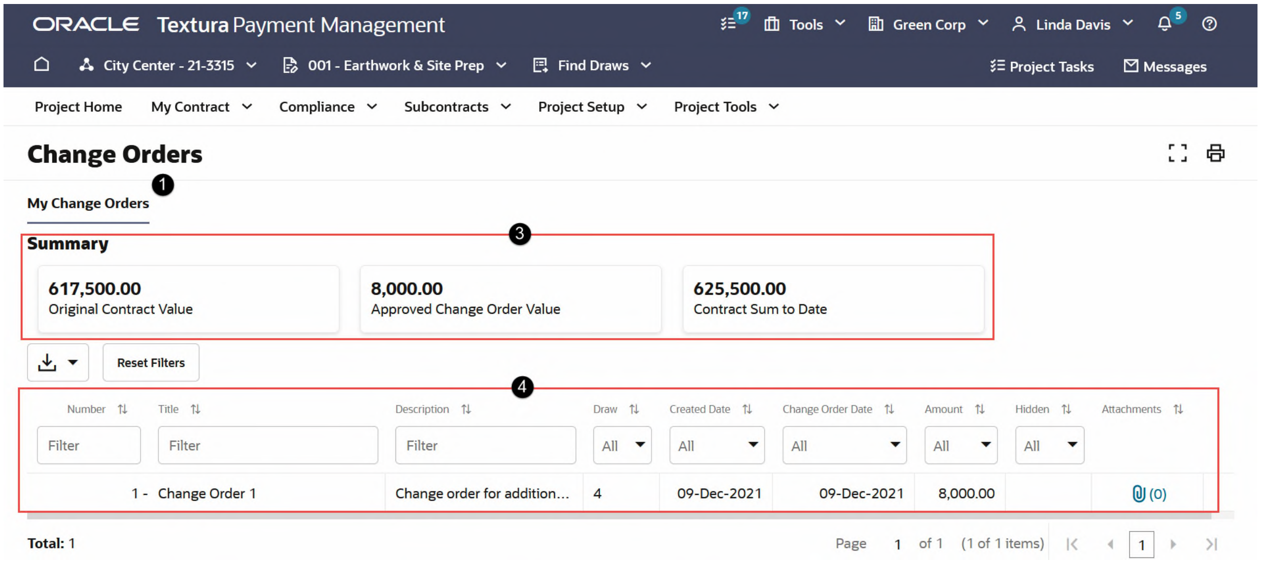
Working with the Change Orders Page for Subcontractors



1) **My Change Orders Tab**: View change orders the General Contractor added to your Schedule of Values (SoV).
2) **Subcontract Change Orders Tab** (Not Pictured): View and create change orders for Sub-Tiers working on the project.
3) **Summary Tiles**: Easily compare your original contract value to the sum of your current contract with change orders added. On the **My Change Orders** tab, see the original value of your contract, the total value of all approved change orders, and the total value of your contract with change orders. On the **Subcontract Change Orders** tab, see the total value of approved change orders.
4) **Change Order Table**: See change order details for either your contract or all of the Sub-Tier subcontracts on a project. Use the filters at the top of the table to narrow the list of entries in the table.

Navigate to the Change Orders Page

- From the **My Contract** menu at the top of any project page, select the **My Change Orders** link to go to the **My Change Orders** tab of the **Change Orders** page.
- From the **Subcontracts** menu at the top of any project page, select the **Subcontract Change Orders** link to go to the **Subcontract Change Orders** tab of the **Change Orders** page. This option is only available if you are a Prime Subcontractor with on-system Sub-Tier Subcontractors working for you on the project.

Sub-Tier Change Order Management for Prime Subcontractors

As a Subcontractor working on a General Contractor's project on TPM, you may need to hire and track the work of Sub-Tier Subcontractors. A Sub-Tier Subcontractor either performs work for your organization or provides supplies.

When you need a Sub-Tier to submit billings and receive payment through TPM, you will create a subcontract for the organization. This is similar to the contract shared between your organization and your General Contractor. After you create a subcontract for a Sub-Tier Subcontractor, your organization will take on the role of a Prime Subcontractor.

If at a later time you need to adjust the value of the the Sub-Tier Subcontractor's subcontract, you can either increase or decrease it with a Sub-Tier change order. The following topics explain how to create and delete these Sub-Tier change orders on TPM.

Subcontract Change Orders

Create a Subcontract Change Order (SCO) to change the contract value of an existing Sub-Tier subcontract.

- SCOs that create a new component automatically allocate the new component to the Subcontractor's SoV.
- SCOs that change existing components require a Subcontractor to allocate the change order.

When you use the **Specified SoV** project setting, you, will allocate the Sub-Tier change order on the behalf of your Sub-Tier Subcontractor.

After you create an SCO, the application sends an email to Subcontractors as a reminder to **Edit the SoV** to allocate the change order.

The **Allocate Change Order** page shows one change order at a time. If a contract has more than one change order, save the allocations for the first change order to see the next change order display on the page.

The SoV is out of balance until the change order is allocated.

Creating a Subcontract Change Order for Subcontractors

To create a subcontract change order (SCO) for a Sub-Tier:

1) ***Navigate to the Change Orders Page*** (see page 4).
2) From the **Subcontract Change Order** tab, select the **+Add...** button.

   An **Add Subcontract Change Order** dialog box displays.
3) In the dialog box, choose a contract from the drop-down, and select the **Next** button.

   The dialog box closes and the **Contract Maintenance** page displays.
4) From the **Contract Maintenance** page, select the **Change Order** button.

   A dialog box displays.
5) In the dialog box, enter information in all available fields.
6) Optional. Select the **Hidden Change Order** option to modify the **Original Scheduled Value** and **Contract Sum to Date** column in a project's Schedule of Values (SoV).

   Hidden change orders:
   - Do not appear in the **Net Change by Change Order** column
   - Are not identified as a change order-related value on invoice (pay application) documents
   - Cannot be un-hidden later.

7) Select the **Save Changes** button.

   The dialog box closes and the **Contract Maintenance** page shows the **Change Orders** tab. The table on the page includes:

   - A **C/O created in Session** button with the change order amount.
   - A **C/O Adjustment** column displayed in red.

8) Optional. Add a new line if the change order includes work not itemized in the contract.

   a. Select the **Add New Component** button.

      A new line appears.

   b. Select the **Phase Code** column for the new line, and then select the **Find** button.

      A dialog box displays.

   c. In the dialog box, select a component to link to the subcontract cost code.

      The dialog box closes, and the **Phase Code** and **Description** fields automatically display information pulled from the selected component. You can change the description.

   d. Enter a **Subcontract Item**.

9) In the **C/O Adjustment** column, enter the amount to pay the Subcontractor for each line impacted by the change order.

   - SCOs that create a new component automatically allocate the new component to Sub-Tier SoV (as a single line-item).
   - SCOs that change existing components require a Sub-Tier to allocate the change order.
   - The total displayed under the **C/O Adjustment** column must match the total amount of the change order.

10) Select **Save Changes**.

   - A **Status** page confirms the contract changes have been saved.
   - The application sends an email to Project Managers in the Sub-Tier organization, informing them them that a change order was added.
   - A task to allocate the change order displays on the Sub-Tier's **Project Home**, **Draw Home**, and **Tasks** pages.
   - If the contract uses the **Specified SoV** setting, you will allocate the subcontract change order in place of the Sub-Tier. You will see a project task and receive an email prompting you to allocate funds.
   - If you created the change order in error, you can delete it before it is allocated.

Deleting Sub-Tier Change Orders

To delete a subcontract change order (SCO) you created for a Sub-Tier Subcontractor:

1) ***Navigate to the Change Orders Page*** (see page 4).

2) In the line for the change order, select the **Delete** button.

   A dialog box displays.

3) From the dialog box, select the **Yes** button.

   The change order disappears from the table and a **Success** message displays at the top of the page.

Missing a delete button? A Textura representative will need to delete the change order. ***Contact Oracle Support https://docs.oracle.com/cd/E97085_01/10313339.htm***.

Allocate Change Orders for Subcontractors

As a Subcontractor, use the **Change Order Allocation** page to adjust your **Schedule of Values** (SoV) with the change order amounts assigned by the General Contractor.

A bulleted list shows:

- How many change orders need to be allocated
- Which change order can be allocated on the current page
- The draw context (which draw is impacted by the change order allocation).

A table shows budget, or Schedule of Values (SoV) lines impacted by the change order. It includes an **Allocate** column with the change order amount.

See Working With the Schedule of Values Page for Subcontractors for more about the Schedule of Values.

Navigate to the Allocate Change Order Page

When a General Contractor creates a change order, a **Schedule of Values Out of Balance** section is generated on the **Project Home Page** for all affected Subcontractors.

To find the **Allocate Change Orders** page:

- Select the link in the system-generated email.
- Select the link from the **Tasks** page.
- Use the **Required: Edit Schedule of Values** link under the **Schedule of Values Out of Balance** section.
- Choose the **Edit Schedule of Values** link from the **My Contract** menu at the top of any page.

Allocating a Change Order Amount

The **Allocate Change Order** page shows one change order at a time. If a contract has more than one change order, the next change order will display on the **Allocate Change Order** page after you save the first one.

To allocate a change order amount on the **Allocate Change Order** page:

1) ***Navigate to the Allocate Change Order Page*** (see page 7).

   The **Allocate Change Order** page displays.

2) On the **Allocate Change Order** page, enter an amount in the **Allocate** column for each line impacted by the change order.

   When you complete an entry, the amount displays in the **Net Change By C/O** total.

- When the **Working Total** in the **Allocate** column equals the **Total**, the allocation is complete.
- The **Working Total** amount matches the amount in the **Allocate** column heading.

3) Optional. Add an additional line.
   a. Select the **Add New Line** button to add an additional line to the **Schedule of Values** for the change order.
   b. In the **Allocate** column for the new line, enter the change order amount you would like to allocate.

   Note: The new line also requires a **Phase Code** and **Description**.

4) Select the **Save Changes** button.

   A **Status** page confirms you allocated the change orders.

Additional Change Order Information

The topics in this section explain how to manage change order documents. They also list and explain the table fields you may see on the **Change Orders** page.

Change Orders Fields for Subcontractors

Subcontract

The number of the Sub-Tier subcontract the change order will affect. Select the subcontract number in a table row to go to the **Contract Status** page for the related subcontract. This column only displays on the **Subcontract Change Orders** tab.

Subcontractor

The name of the Sub-Tier organization on the application. This column only displays on the **Subcontract Change Orders** tab.

Number

Either the number a General Contractor assigned to a change order for your contract, or the number you assigned to a change order for a Sub-Tier subcontract. On the **Subcontract Change Orders** tab, select the number in a table row to edit a change order. You cannot update the change order amount by this method. This column displays on both tabs.

Title

Either the name a General Contractor gave to a change order for your contract, or the name you gave to a change order for a Sub-Tier subcontract. The name can contain letters, numbers, and special characters. On the **Subcontract Change Orders** tab, select the name in a table row to edit a change order. You cannot update the change order amount by this method. This column displays on both tabs.

Description

Further detail about what the change order includes. This column displays on both tabs.

Draw

The draw in which the change order takes effect. This column displays on both tabs.

Created Date

The date you or the General Contractor added the change order on the application. This column displays on both tabs.

Change Order Date

The reference date of the change order. This column displays on both tabs.

Amount

A positive or negative monetary change applied to the contract. This column displays on both tabs.

Hidden

States if a change order is hidden. This column displays on both tabs.

Paper Clip Icon (Attachments)

Shows the number of attachments linked to a change order. Select the icon to upload or view an uploaded document. This column displays on both tabs.

Trash Can Icon (Delete)

Delete a change order. This column displays only displays on the **Subcontract Change Orders** tab.

Uploading a Change Order Document

To upload a change order document:

1) ***Navigate to the Change Orders Page*** (see page 4).
2) In the line for the change order to upload a document to, select the paper clip icon.

   An **Upload Files** dialog box displays.
3) In the dialog box, select the ellipses **(...)** button and choose a file to upload. You can choose to upload either one or several documents.
4) Enter a description for the document.

   This description applies to all documents uploaded to the dialog box.
5) Select the **Upload** button.

   The document displays in a table within the dialog box.
6) (Optional) Use the **Actions** drop-down to classify or declassify the document.

   The classify option applies to all documents uploaded to the dialog box.
7) Select the **Close** button.

   The dialog box closes and the number of attached documents displays next to the paper clip icon on the **Change Orders** page.

Viewing an Uploaded Change Order Document

To view an uploaded change order document:

1) ***Navigate to the Change Orders Page*** (see page 4).
2) In the line for the change order with a document to view, select the paper clip icon.
   An **Upload Files** dialog box displays.
3) From the **Upload Files** dialog box, select the file name of the document.
   A dialog box displays.
4) In the dialog box, either select a program to open the document or save the document.
5) Select the **OK** button.
   The document either opens or saves to your computer.

Frequently Asked Questions

What happens to my usage fee when I have a variation?

Usage fees on Textura are based on your contract value. When you are responsible for paying your own fees, you will receive a refund if your contract value decreases by 25% or more. If a change order increases your contract value by 25% or more, you will need to pay the difference between your previous usage fee and new usage fee based off this new value. These two scenarios are called **Fee Events**.