Purpose:

The purpose of this Standard Operating Procedure is to document changes in scope of work and to track financial changes to the Subcontractor's contract. Following these SOP guidelines will help ensure that all Subcontractor Change Orders are processed and set up consistently within Procore.

Procedure:

A. Project Manager to identify a change in scope of work as defined by the contract documents and the Subcontractor contract.

B. Prepare Change Request
   1. Solicit pricing from affected Subcontractors.
   2. Create Change Request
      a. In Project Tools select "Change Request Tab" and hit create new.
      b. Fill in all known information in the General Information section.
      c. In Scope pull down menu select "Out of Scope".
      d. In the Description Box add all detailed information pertaining to Change Order.
      e. Attach all backup documentation in the Attachment Box by selecting "Attach File or Drag and Drop".
         a. Select Add Line-Item Tab.
         b. Add Budget Code, Description, Vendor, Quantity and Unit Cost for each line item.
      f. Save and exit back to main Change Event page.

C. Subcontract Change Order:
   a. In Change Events select "Change Event" (by clicking box next to heading) that will be included in "Subcontract Change Order". In Bulk Action pull down menu select "Create Commitment CO". This will create a "Subcontract Change Order" for Subcontractor Review.
   b. New Subcontract Change Order Screen will appear.
      a. In General Information change status as "Approved".
      b. Enter Due Date.
      c. Fill out "Designated Reviewer"
      d. Fill out "Request Received From" information.
      e. Check "Executed Box".
      f. Fill out "Location".
      g. Fill out "Schedule Impact" if affected.
      h. In Change Event Line Items all "Associated Line Items" are to be marked "New Line Item"
      i. Once all info is filled out you can hit "Create Email" at lower right corner. A "Subcontract Change Order" has now been created and email info will be created to send to subcontractor for execution.

c. Once Change Order has been executed attach document to Change Order in Procore. Edit Change Order by adding date Change Order was received in “Signed Change Order Received Date tab”. Hit save.
d. Next Action “Update Commitment”. In top right hand corner of Subcontract Change Order click button “Send to ERP”. This will send the cost to accounting and update job cost.