



STATE OF NEW JERSEY

**SCHOOLS DEVELOPMENT AUTHORITY**

## **Section 29**

# **Authority Agent Recommendation (AAR)**

**ORACLE** Primavera

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## I. CHANGE MANAGEMENT

Going forward, General Contractors (GC) and Architects (A/E) will be contractually required to use the SDA Contract Management system. In the meantime, it is the responsibility of the PMF/CM to use the system. This may require direct data entry of GC and A/E related information. This may also be delegated to the GCs and A/Es if possible.

Change documents in Contract Management will include:

1. Request for Information (RFI)
2. Contract Change Request/Authority (CCR/A)
3. Contractor Proposal (CP)
4. Authority Agent Recommendation (AAR)
5. Change Order (CO)
6. Construction Change Directive (CCD)
7. Contractor Claim Notice (CCN)

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.

As the person who certifies that all necessary procedures have been followed and signatures obtained, the Project Manager (PO) will also be the person best able to determine whether all phases of the change management process will need to be utilized in any given case.

### SPECIAL NOTES:

- a. All Change Orders for E-Rate contracts should be entered into Contract Management. They will be automatically updated in the SIMS (Schools Information Management System) Accounts Payable system.
- b. Change Orders, Task Orders and Amendments that are not related to Design/Construction/E-Rate/CM Contracts will be updated automatically in Contract Management on a daily basis. This includes Real Estate and other types of contracts that are not directly managed in Contract Management.
- c. All documents default to a status of **New Item** when they are created. As they flow through the Change Management process, their status will automatically change to **Closed**. However, a status of **Cancelled** is available to be selected manually. A Cancelled status indicates that the document is no longer required, but should be retained for historical purposes. A cancelled document cannot be reopened for processing.
- d. There are two items in the **Review Status** section that we are currently not using. The first is a check box labeled **Do not check or this document will need to be deleted**. Do not check this box. The second is **Document Owner**, relating to functionality we are currently not using.

## II. INITIATING A CHANGE MANAGEMENT DOCUMENT FROM ANOTHER DOCUMENT

**Note:** This document assumes that the A/E is online and has a login to Contract Management. If necessary the PMF/CM can follow the steps listed, attaching documentation and setting document status for tracking purposes.

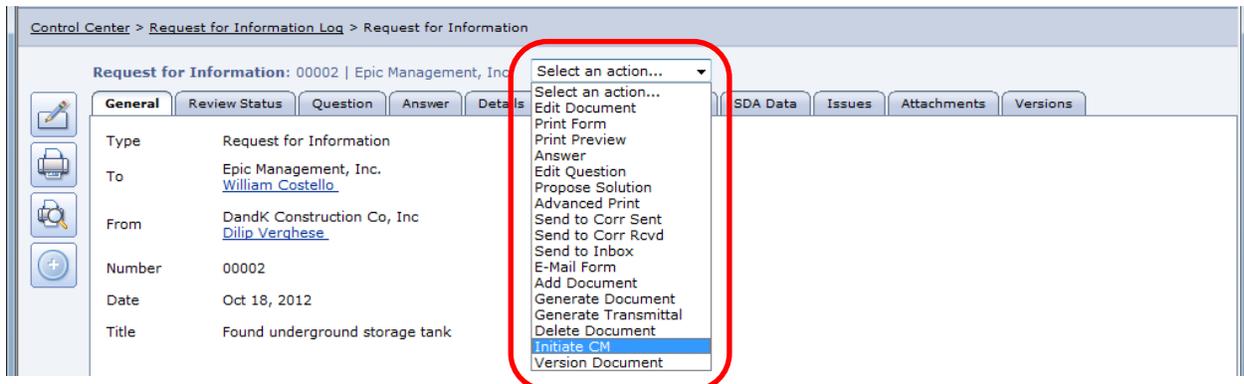
All details regarding the change can be viewed from the master **Change Management** document. Each phase of change management going forward is initiated from the master Change Management document. As each of the supporting documents (Contract Change Request/Authority, Contractor Proposal, Authority Agent Recommendation, Change Order, Construction Change Directive) is completed, it is closed to editing and a link to it is created on the master Change Management record.

**IMPORTANT:** Never change the status of the master Change Management document. A change to the status on this main document will flow down to all linked documents, resulting in status changes to documents potentially still in review.

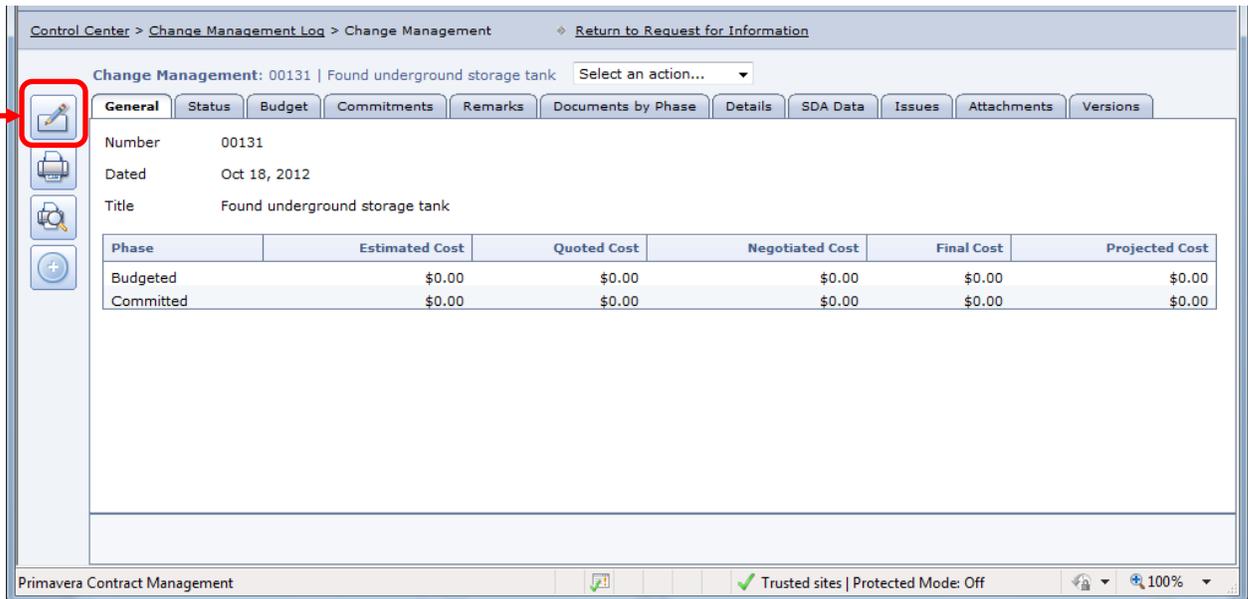
**NOTE:** This example shows initiating Change Management from an RFI. If you are beginning from this point, perform the following steps to open the RFI:

- *Log in to Contract Management*
- *Locate your project from the project list*
- *Choose the Communication folder*
- *Locate your desired RFI from the log and open in edit mode*

1. With the RFI open, click the **Select an Action** menu on the top of the screen and click **Initiate CM**.

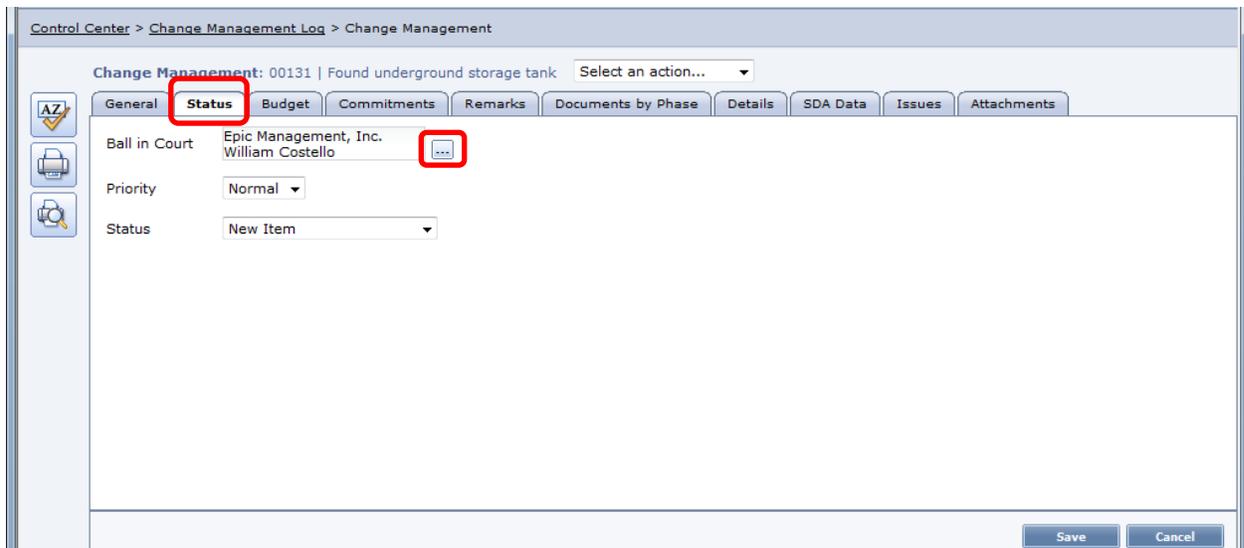


2. The master **Change Management** document displays. If necessary, click the **Edit document** icon to begin editing this document.



**Important:** Contract Management will provide the next available Change Management number for this document during the creation process. **Do not** change this assigned number.

3. Click the **Status** tab. Although the **Ball in Court** field has been automatically populated from the RFI, it is important to change it as this document will not be forwarded for review. Only the documents it holds will be forwarded for review. Click the **select** link next to the field and choose **To Be Determined** from the contact list.



4. Click the **Details** tab and select the **Reason for Change** from the drop down list.

Change Management: 00131 | Found underground storage tank | Select an action...

General Status Budget Commitments Remarks Documents by Phase **Details** SDA Data Issues Attachments

Reason for Change  
Scope  
Referenced Document  
Activity ID

- Owner-Initiated Change
- Diff. Site Conditions
- Delay - CLAIMS ONLY
- Design Consult E/O(COs)
- GC Error (Amendments)

Save Cancel

5. Click the **SDA Data** tab and complete the **Justification** field. Please note that this field must be updated any time the justification is modified.

Change Management: 00131 | Found underground storage tank | Select an action...

General Status Budget Commitments Remarks Documents by Phase Details **SDA Data** Issues Attachments

Justification  
To provide approval for removing the underground storage tank that was discovered during construction

CCD Justification  
DCD Justification

**FOR CMD USE ONLY**

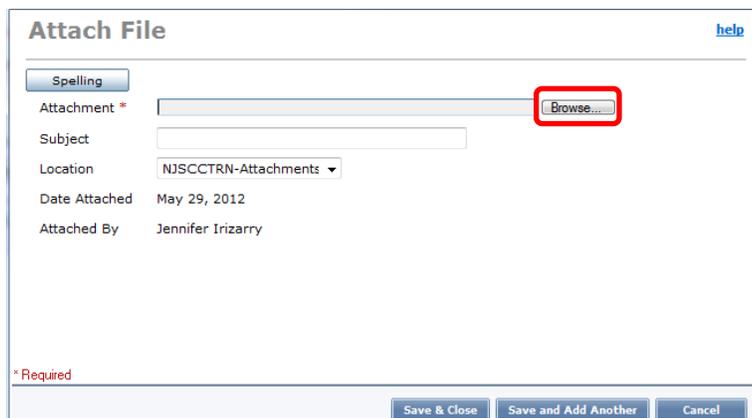
Program Operations Team  
Contract Number  
Change Order Type  
Change Order / Amendment Number

Save Cancel

- To attach additional information, click the **Attachments** To attach supporting documentation, click the **Attach File** button.



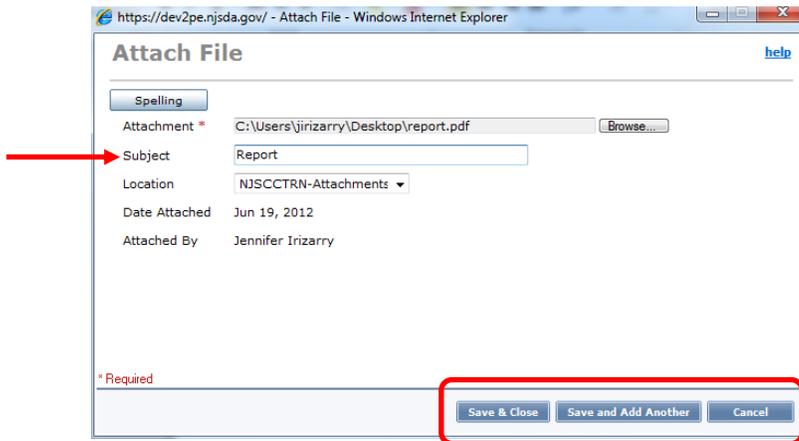
- Click the **Browse** button to navigate to the document you wish to attach.



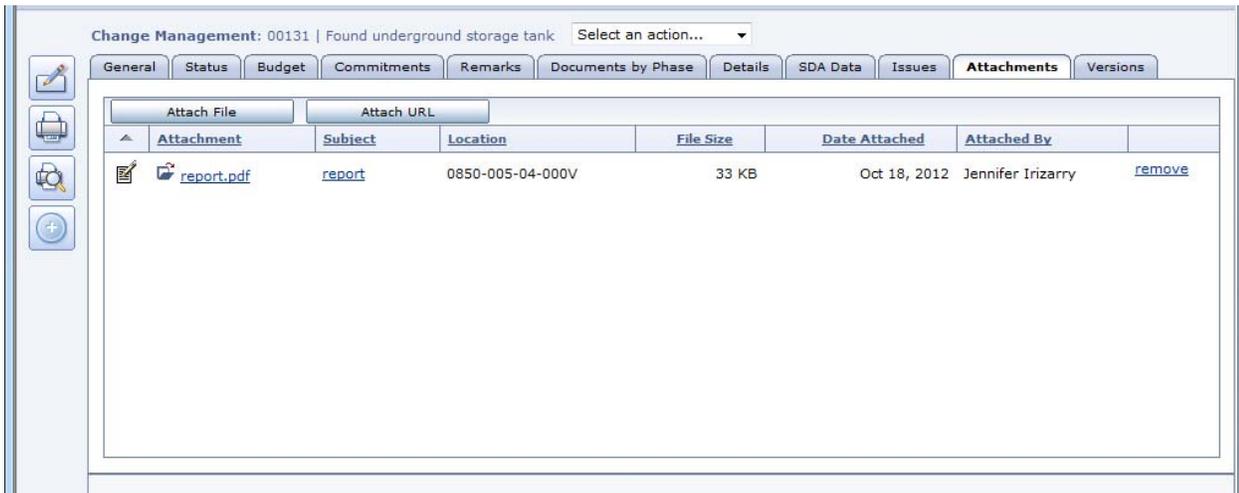
- The **Choose File to Upload** window displays. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



9. Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save & Add Another** button to add additional documents repeating the same process.



10. The attached file displays in the **Attachments** section.



**Note:** All documents attached to the master **Change Management** document will be copied to the subsequently created supporting documents.

11. When all fields on the document are completed, click the **Save** button at the bottom of the document window.

Control Center > Change Management Log > Change Management

Change Management: 00131 | Found underground storage tank | Select an action...

**General** | Status | Budget | Commitments | Remarks | Documents by Phase | Details | SDA Data | Issues | Attachments

Number \* 00131

Dated Oct 18, 2012

Title Found underground storage tank

Phase	Estimated Cost	Quoted Cost	Negotiated Cost	Final Cost	Projected Cost
Budgeted	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Committed	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

\* Required

Save Cancel

### III. CREATING THE AUTHORITY AGENT RECOMMENDATION (AAR)

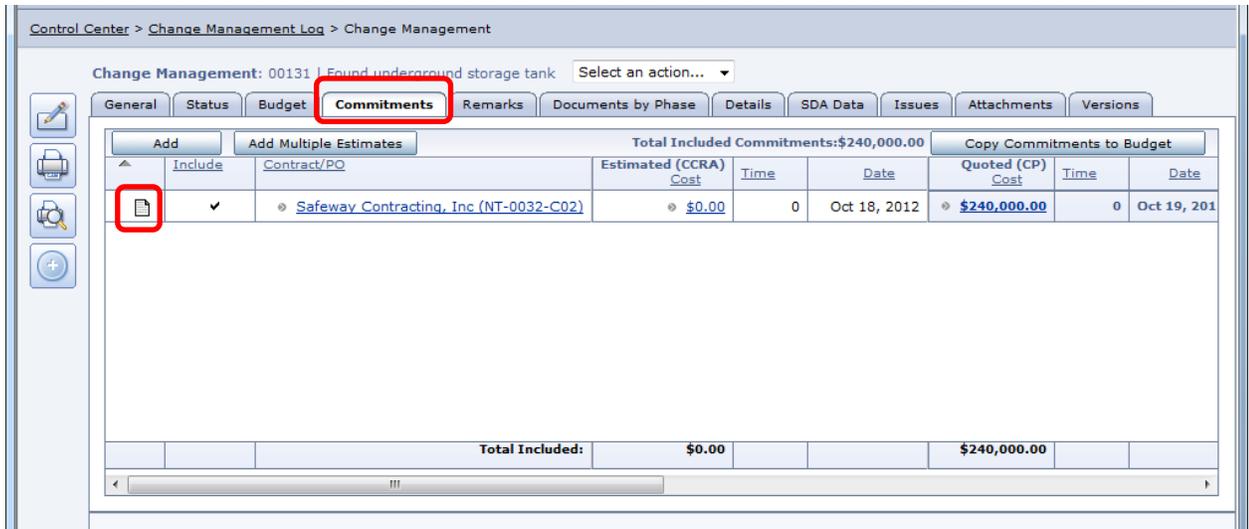
Once the PMF/CM has received the A/E's and the GC's estimates for the cost of the change, an **Authority Agent Recommendation** is generated from the estimate that the GC provided in the Contractor Proposal (CP). The Authority Agent Recommendation starts the negotiation phase of the Change Management process.

 The negotiated phase of Change Management is the only phase that allows unlimited iterations. Negotiations can be tracked to resolution with all history maintained for accurate reporting. Although it is recognized that much of the negotiation which takes place between the GC and the PMF/CM/PM may be done via telephone or in person, it is **strongly recommended that all rounds of negotiations be entered into Contract Management.** It is not necessary to create a new Change Management document for each round of negotiations; they can all be entered on the same document.

***NOTE: If you are beginning from this point, perform the following steps to open the Change Management document:***

- ***Log in to Contract Management***
- ***Locate your project from the project list***
- ***Choose the Change Order Management folder, then choose Change Management***
- ***Locate your desired Change Management document from the log and open in edit mode***

1. In the master **Change Management** document, click the **Commitments** tab, then click on the **Edit document** icon next to the existing line item to initiate the next phase of change management. Note: If this is a new Change Management record with no existing line item, click the **Add** button.



Control Center > Change Management Log > Change Management

Change Management: 00131 | Found underground storage tank | Select an action...

General | Status | Budget | **Commitments** | Remarks | Documents by Phase | Details | SDA Data | Issues | Attachments | Versions

Add | Add Multiple Estimates | Total Included Commitments: \$240,000.00 | Copy Commitments to Budget

Include	Contract/PO	Estimated (CCRA) Cost	Time	Date	Quoted (CP) Cost	Time	Date
 ✓	Safeway Contracting, Inc (NT-0032-C02)	\$0.00	0	Oct 18, 2012	\$240,000.00	0	Oct 19, 201

Total Included: \$0.00 | \$240,000.00

2. Click on the **Start Negotiated Phase** button (which is the Authority Agent Recommendation).

The screenshot shows a form titled "Negotiated (AAR)". It contains the following fields and values:

Cost	0.00
Time Change (days)	<b>Start Negotiated Phase</b>
Document Date	

3. An **Authority Agent Recommendation (AAR)** displays. Complete the information in the following tabs:

### A. General Tab

The **To** and **From** fields on the General tab will need to be edited in order to display the proper contact information. The AAR should be sent *To* the SDA PO *From* the PMF/CM. Click the **Select** button next to the field to select the names from the contact list.

The screenshot shows the "Authority Agent Recommendation: 00001 | Safeway Contracting, Inc" form in the "General" tab. The fields and their values are:

Type *	Authority Agent Recommendation
Contract *	Construction (NT-0032-C02)
To *	Safeway Contracting, Inc Cara Greeley
From *	New Jersey Schools Development Aut Kimberli Banegas
Number *	00001
Title	Found underground storage tank
Date	Oct 22, 2012
Total Cost	\$240,000.00
Time Change (days)	0

\* Required

**IMPORTANT:** *This is the only opportunity you will have to select the To/From company. Once you save the document, you will not be able to edit the company, only the contact names.*

## B. Status Tab

Click the **Status** tab and check the name in the **Ball in Court** field. This name should be the same as the To field. If necessary, click the **select** button next to the field to select the correct name from the contact list.

The screenshot shows the 'Status' tab of the Authority Agent Recommendation form. The 'Ball in Court' field is highlighted with a red box and contains the text 'New Jersey Schools Development Auth' and 'Aaron Goss'. A red arrow points to the 'select' button (three dots) next to the 'Ball in Court' field. Below the 'Ball in Court' field, there are two 'Acknowledged by' sections. The first section has 'Company' set to 'New Jersey Schools Development Auth' and 'Contact' set to 'Aaron Goss'. The second section has 'Company' set to 'Epic Management, Inc.' and 'Contact' set to 'William Costello'. The 'Status' dropdown is set to 'New Item'. The 'Priority' dropdown is set to 'Normal'. The 'Save' and 'Cancel' buttons are at the bottom right.

## C. Details Tab

Click the **Details** tab and enter instructions/comments from the GC in the **Description** field (either delete the information which is included from previous phases, or insert your instructions above it).

The screenshot shows the 'Details' tab of the Authority Agent Recommendation form. The 'Description' field is highlighted with a red box and contains the text: 'Our internal estimates are lower than your provided estimates. Please review the attached and let's discuss.' Below the 'Description' field, there are several fields: 'Spec Section', 'Cost Category' (set to 'Commitment'), 'Cost Type' (set to 'Pending'), 'Required Date' (set to 'Oct 29, 2012'), 'Acknowledged Date', 'Previous Change Management Phase' (set to 'Found underground storage tank (00001)'), and 'Change Management Number' (set to 'Found underground storage tank (00131)'). The 'Save' and 'Cancel' buttons are at the bottom right.

## D. Line Items Tab

1. Click the **Line Items** tab and choose the edit icon next to the line item.

Authority Agent Recommendation: 00001 | Safeway Contracting, Inc | Select an action...

General | Status | Summary | **Line Items** | Details | Schedule | SDA Data | Issues | Attachments

Add Lump Sum | Add Unit Price | Copy from Contract

Line Item No.	Quantity	Units of Measure	Description	Unit Price	Net Amount	Tax Rate	Sales Tax	Line Item Total
00001					\$240,000.00	0.00000	\$0.00	\$240,000.00

Grid Totals: 0.00 | \$240,000.00 | \$0.00 | \$240,000.00

Save | Cancel

2. Enter the PMF/CM's estimate in the **Lump Amount** field. When you click off of the field, notice that the dollar value is automatically populated in the cost code field.

Lump Sum [ << Previous ] [ Next >> ] help

Spelling

Change Proposal Unit

Type Lump Sum

Line Item No. \* 00001

Description

Lump Amount (\$) 220,000.00

Tax Rate 0.00000

Sales Tax (\$) 0.00

Line Item Total (\$) 220,000.00

Material Name ... X

Material Title

Activity ID ... X

Costing top of page

Add | Add Multiple Cost Codes | Remove Zero Values

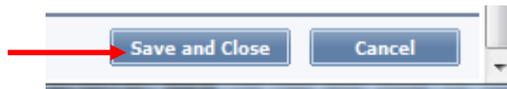
Cost Code	Title	Distributed
030	Construction	220,000.00 add balance remove

Issues top of page

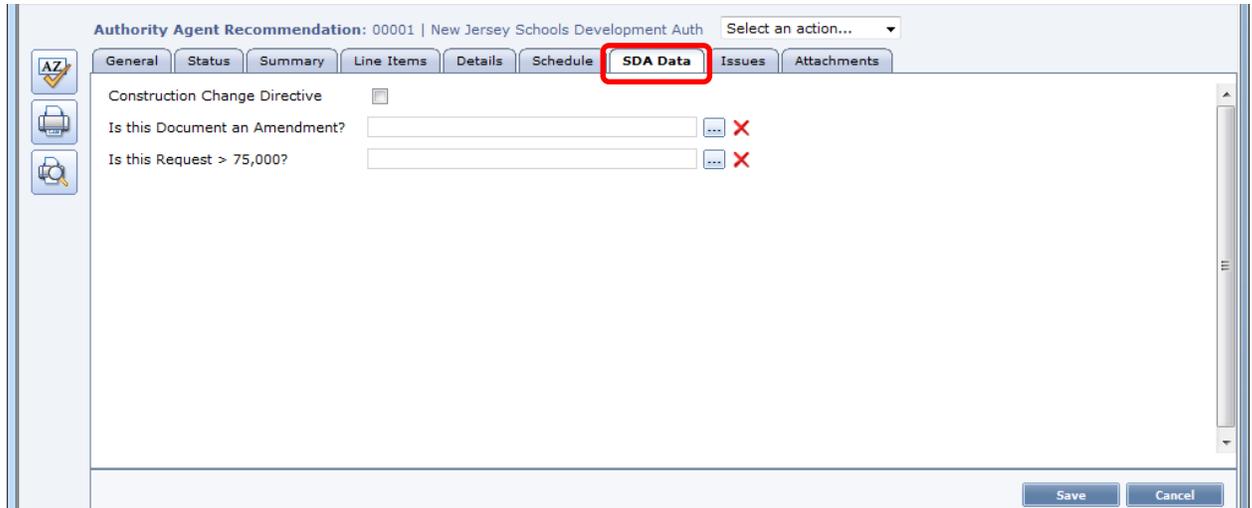
Attachments top of page

\* Required

- When completed, scroll to the bottom of the **Lump Sum** window and click **Save and Close**.



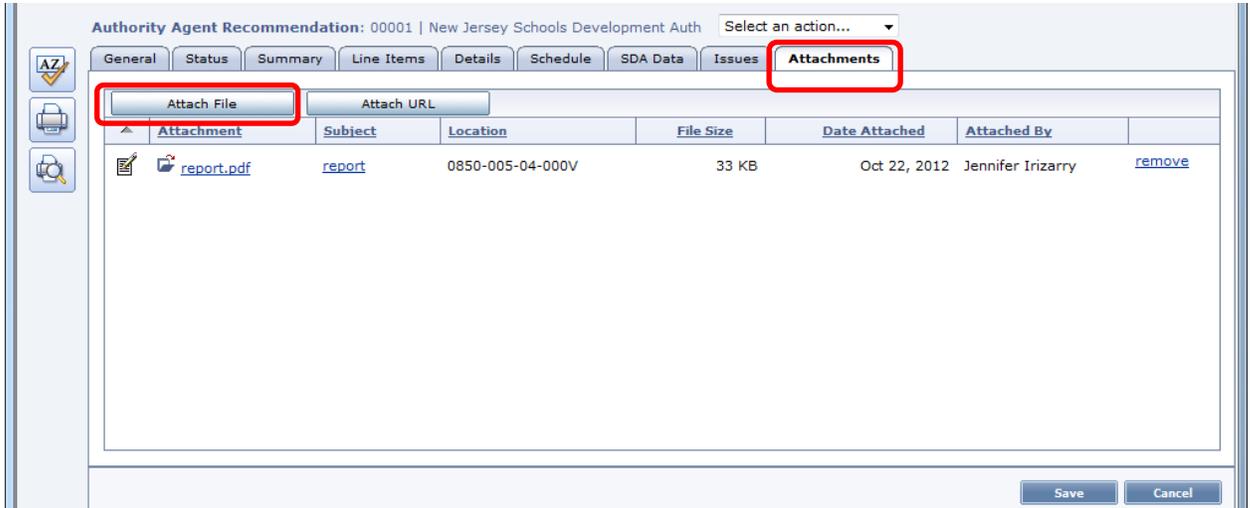
## E. SDA Data Tab

A screenshot of a software application window titled 'Authority Agent Recommendation: 00001 | New Jersey Schools Development Auth'. The window has several tabs: 'General', 'Status', 'Summary', 'Line Items', 'Details', 'Schedule', 'SDA Data', 'Issues', and 'Attachments'. The 'SDA Data' tab is highlighted with a red box. Below the tabs, there are three rows of form fields. The first row is 'Construction Change Directive' with a checkbox. The second row is 'Is this Document an Amendment?' with a text input field and a select button (three dots) and a red 'X' icon. The third row is 'Is this Request > 75,000?' with a text input field and a select button (three dots) and a red 'X' icon. At the bottom right of the window, there are 'Save' and 'Cancel' buttons.

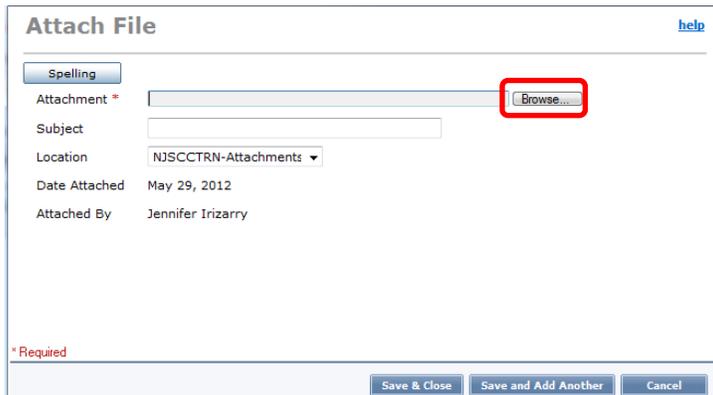
- **Construction Change Directive** – click the checkbox if this CP relates to a Construction Change Directive document
- **Is this Document an Amendment?** –click the select button next to the field and choose the **Yes** option to indicate that this information must be e-mailed to the Contract Management Division (CMD)
- **Is this Request >75,000?** – if the value of this document is greater than \$75,000, click the select button next to the field and choose the **Yes** option to indicate that this information must be e-mail to the Contract Management Division (CMD)

## F. Attachments Tab

To attach additional supporting documentation, click the **Attach File** button. Note that any documents that were attached to the Change Management record have carried forward to this phase of change management.



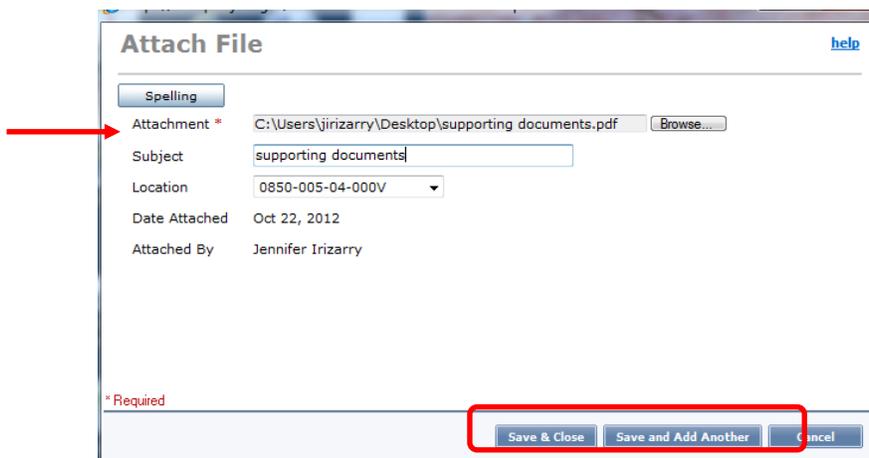
Click the **Browse** button to navigate to the document you wish to attach.



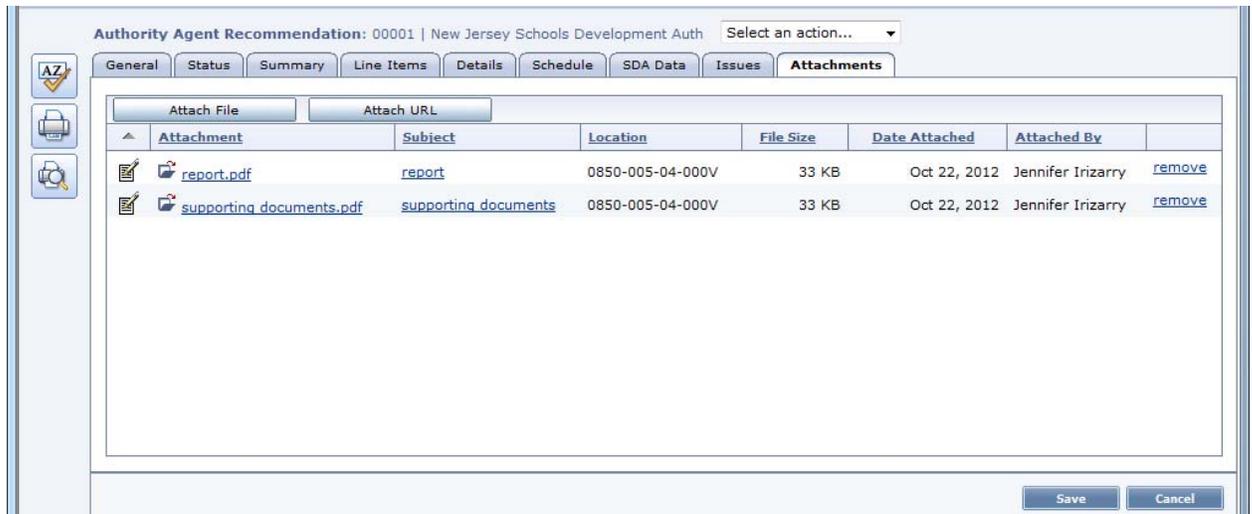
The **Choose File to Upload** window displays. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



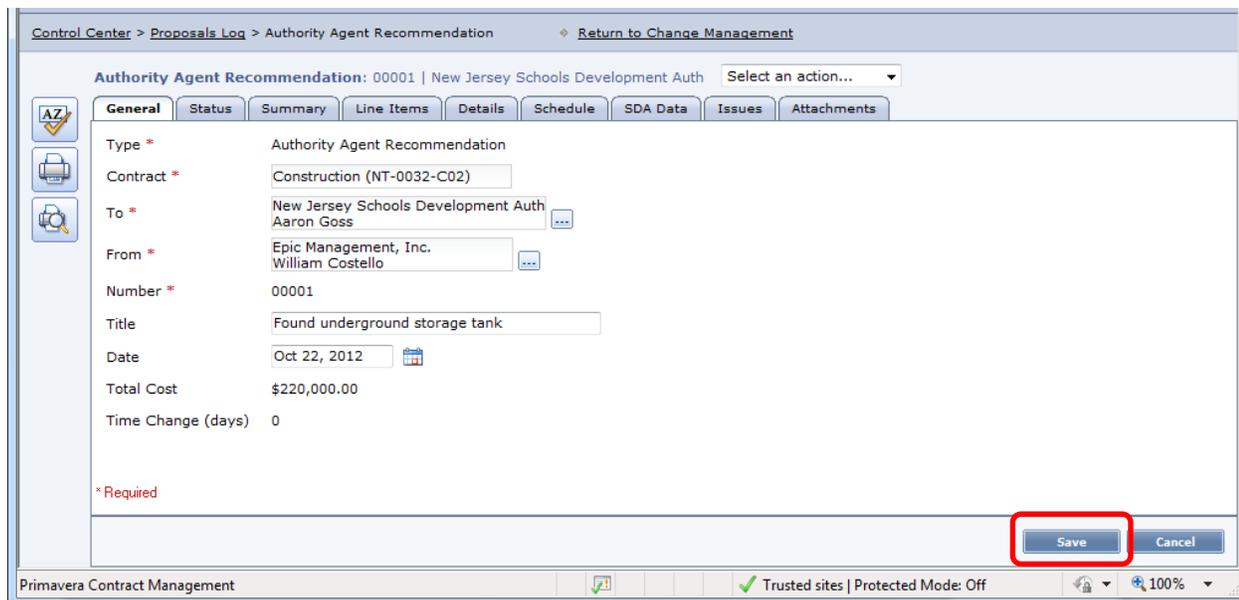
Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save and Add Another** button to add additional documents repeating the same process.



The attached file displays in the **Attachments** section.



When all fields on the document are completed, click the **Save** button at the bottom of the document window.



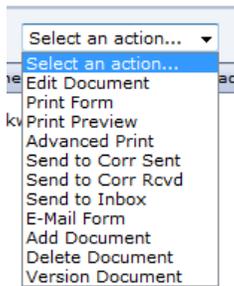
## IV. Version Document

Contract Management 13.0 provides a Version Document feature to help you maintain multiple versions of your documents and provide a snapshot of the change history of the documents. Versioning a document means it will maintain versions of both the document and any attachments. The document version will be stored as an html file. The attachment version will show information on the location, path and the file size of an attachment, as well as the user who attached the file to the document and the date of attachment.

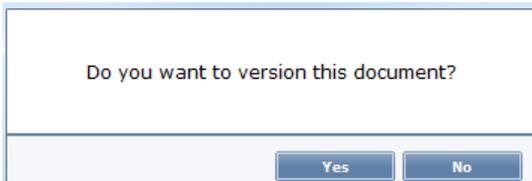
The Versions Tab will be used to track document versions. This tab only displays when you open the document in View mode, not in Edit mode. On the Versions tab, you can view and access previous versions of the selected document, identify who created the versions and when the versions were created.

### A. Create a Document Version

1. To create a version of the current document, click the Select an Action menu from the top of the screen and choose Version Document from the drop-down list.



2. Contract Management will prompt you to confirm the Version Document function. Click the Yes button to continue or No to cancel.

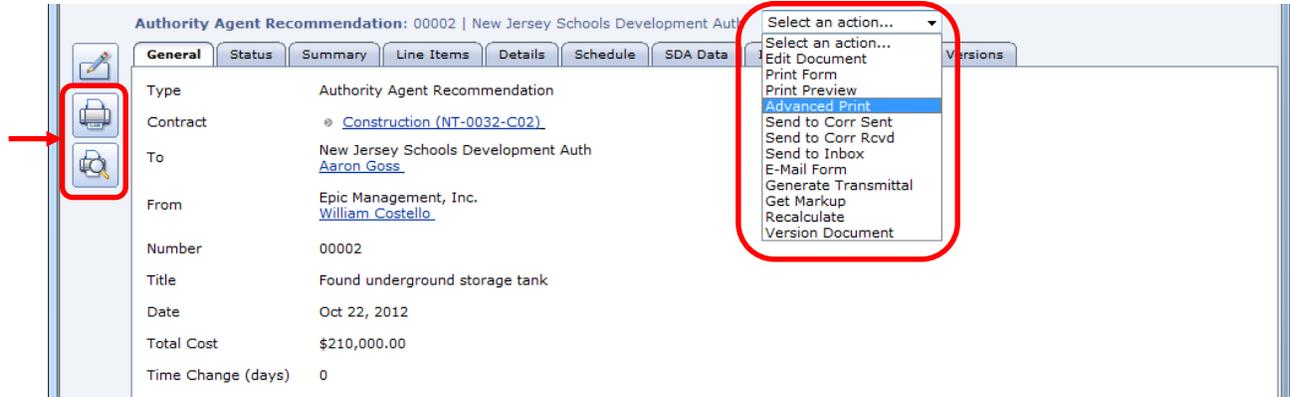


3. The Versions tab displays the document version you just created. As new document versions are created, they will be listed on this tab in reverse chronological order. Click the icon to open each version. When the version displays, it will show information available in the document when the version was created.

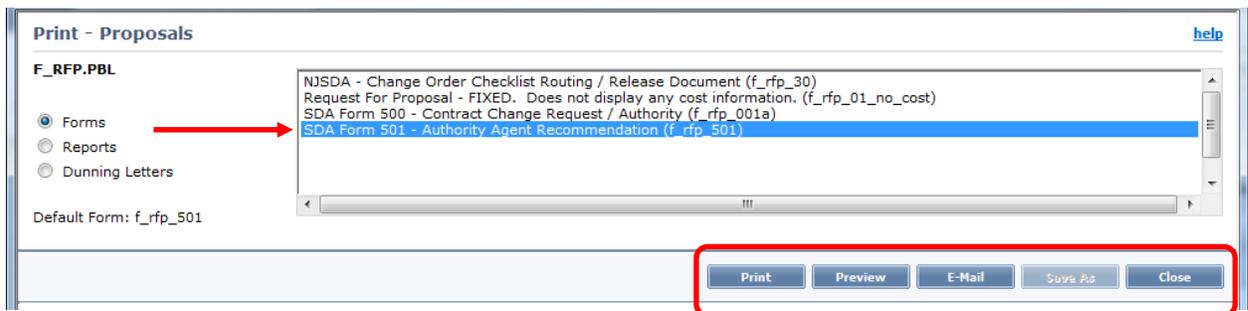


## V. PRINT AN AAR DOCUMENT (Form 501)

To print the Authority Agent Recommendation (SDA Form 501), choose either the **Print Form** button or the **Print Preview** button on the left side of the screen. Additionally, you can choose **Advanced Print** from the **Select an Action menu** on the top of the screen.



If you choose Advanced Print, click **SDA Form 501 – Authority Agent Recommendation** from the report list.



- Click **Print** to get a printed output or to create a PDF file
- Click **Preview** to see your output displayed in the window
- Click **E-Mail** to electronically send the output to another user
- Click **Save As** to save the output to your local computer or other desired location
- Click **Close** when finished to return to the document

A sample of an SDA Form 501 is shown using the Preview button. Click the **Close** button to return to the AAR document.

**Print - Proposals** [help](#)

**F\_RFP.PBL**

- Forms
- Reports
- Dunning Letters

Default Form: f\_rfp\_501

NJSDA - Change Order Checklist Routing / Release Document (f\_rfp\_30)  
Request For Proposal - FIXED. Does not display any cost information. (f\_rfp\_01\_no\_cost)  
SDA Form 500 - Contract Change Request / Authority (f\_rfp\_001a)  
SDA Form 501 - Authority Agent Recommendation (f\_rfp\_501)

Print Preview E-Mail Save As **Close**

1 / 2 75% Collaborate Sign Find

**New Jersey Schools Development Authority** **NJSDA Form 501**  
**AUTHORITY AGENT RECOMMENDATION (AAR)** **AAR No.: 00002**

<b>Date:</b>	10/22/2012	<b>CCR/A No.:</b>	00001
<b>Contract No.:</b>	NT-0032-C02	<b>RFI No.:</b>	00002
<b>Contractor Name:</b>	Safeway Contracting, Inc	<b>School Name:</b>	Arthur L Johnson HS (Clark Township)
<b>PMF/CM:</b>	Epic Management, Inc.	<b>NJSDA Region:</b>	NOR--Northern Regional Office
<b>PMF/CM/PM:</b>	Brian Farley	<b>District Name:</b>	Clark Township--0850
<b>Design Consultant Firm:</b>	Tetra Tech Engineers, Architects and		

**Description**

Still need to talk about this estimate.

Our internal estimates are lower than your provided estimates. Please review the attached and let's discuss.

Estimate from GC attached

Your estimate for this change is requested

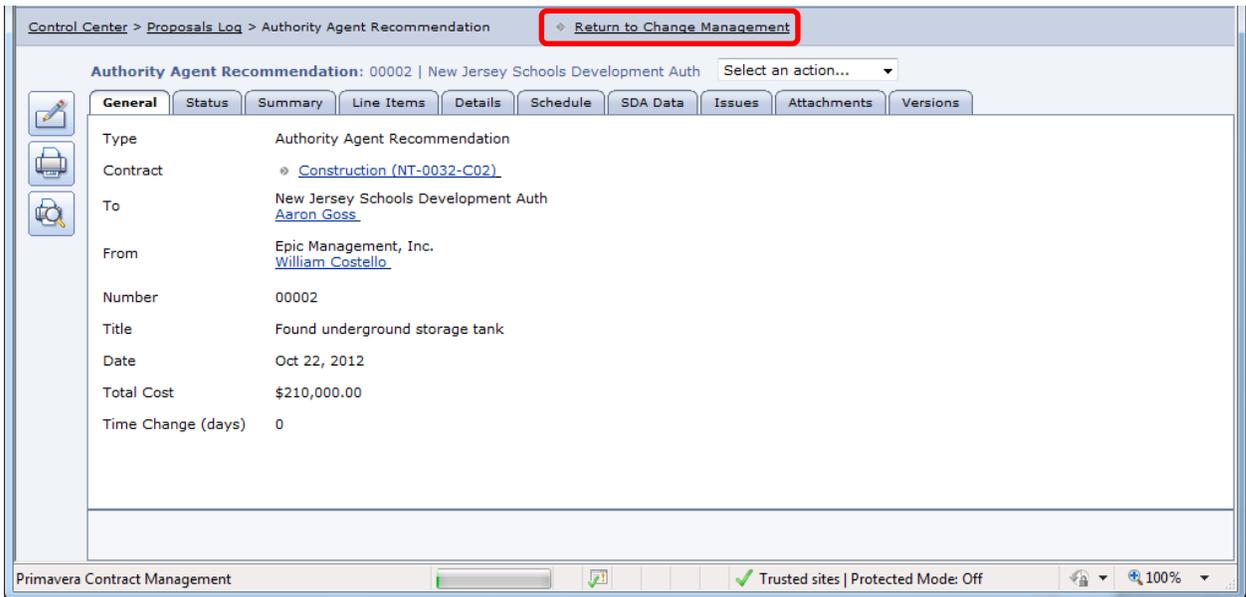
**Cause:**

Owner Initiated  Differing Site Conditions  Design Error and/or Design Omission

**Justification (Reason for Change)**

To provide approval for removing the underground storage tank that was discovered during construction

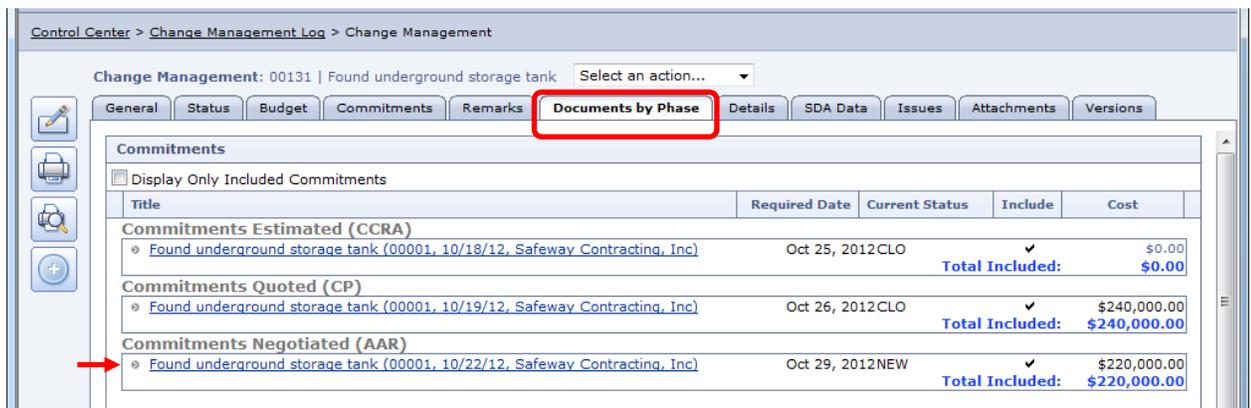
To return to the Change Management document, click the **Return to Change Management** link on the top of the screen.



The line item is now updated on the **Commitments** tab.



You can also click the **Documents by Phase** tab to see the line item updates.

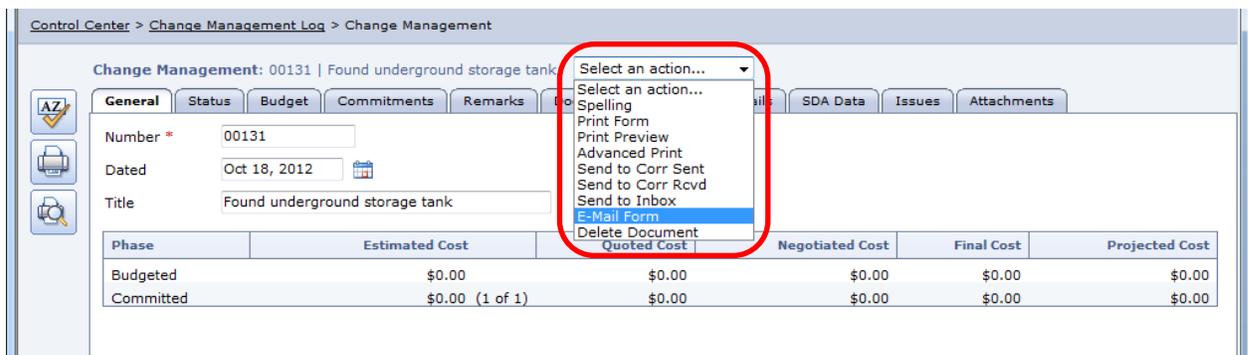


## VI. E-MAILING THE SDA'S CONTRACT MANAGEMENT DIVISION (CMD)

If the PMF/CM's estimate of the change value is greater than \$75k, the PMF/CM solicits input from the SDA's Contract Management Division (CMD), forwarding a copy of the master Change Management document via email. Note that any e-mail sent from within Contract Management will automatically be logged in the Correspondence Sent module.

To email the prospective change to the SDA's Contract Management Division:

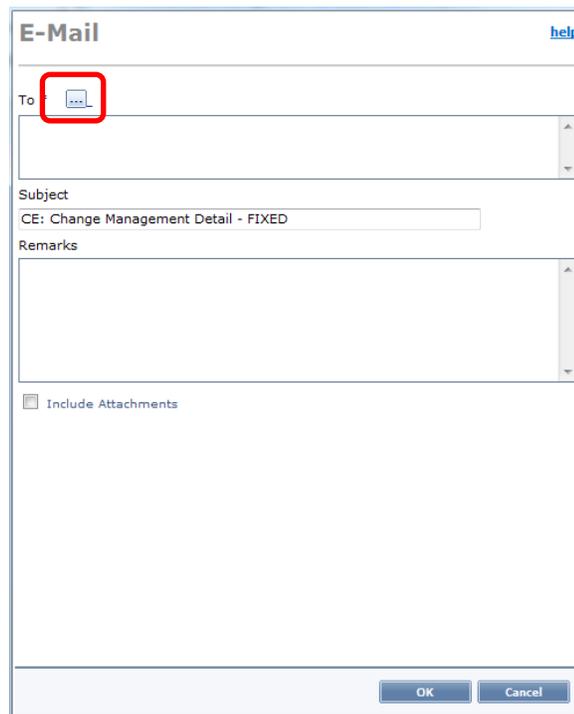
1. With the applicable Change Management document open, choose the **Select an Action** drop-down list on the top of the screen and click **E-Mail Form**.



The screenshot shows the 'Change Management' interface. The title bar reads 'Control Center > Change Management Log > Change Management'. The main content area is titled 'Change Management: 00131 | Found underground storage tank'. There are several tabs: 'General', 'Status', 'Budget', 'Commitments', 'Remarks', 'SDA Data', 'Issues', and 'Attachments'. The 'General' tab is active, showing fields for 'Number \*' (00131), 'Dated' (Oct 18, 2012), and 'Title' (Found underground storage tank). A dropdown menu is open over the 'Select an action...' button, listing options: 'Select an action...', 'Spelling', 'Print Form', 'Print Preview', 'Advanced Print', 'Send to Corr Sent', 'Send to Corr Rcvd', 'Send to Inbox', 'E-Mail Form' (highlighted in blue), and 'Delete Document'. Below the dropdown is a table with columns: 'Phase', 'Estimated Cost', 'Negotiated Cost', 'Final Cost', and 'Projected Cost'. The table has two rows: 'Budgeted' and 'Committed'. The 'Committed' row shows a value of '\$0.00 (1 of 1)' under 'Estimated Cost'.

Phase	Estimated Cost	Negotiated Cost	Final Cost	Projected Cost
Budgeted	\$0.00	\$0.00	\$0.00	\$0.00
Committed	\$0.00 (1 of 1)	\$0.00	\$0.00	\$0.00

2. Click the **select** button to select **SDA Estimating Unit** (under New Jersey Schools Development Authority) from the contact list. It is also recommend that the sender include their own name in the To field.



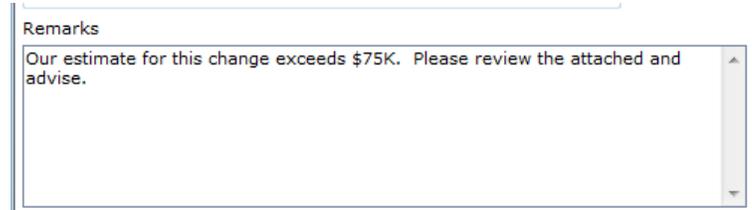
The screenshot shows the 'E-Mail' dialog box. The title bar reads 'E-Mail' with a 'help' link. The 'To' field is highlighted with a red box and contains a dropdown arrow. The 'Subject' field contains the text 'CE: Change Management Detail - FIXED'. The 'Remarks' field is empty. There is a checkbox labeled 'Include Attachments' which is unchecked. At the bottom right, there are 'OK' and 'Cancel' buttons.

3. If desired, change the default **Subject** displayed in the field.



A screenshot of a web form showing a text input field labeled "Subject". The field contains the text "Change Management Document for your review".

4. Enter instructions for CMD in the **Remarks** section of the **E-mail** window.



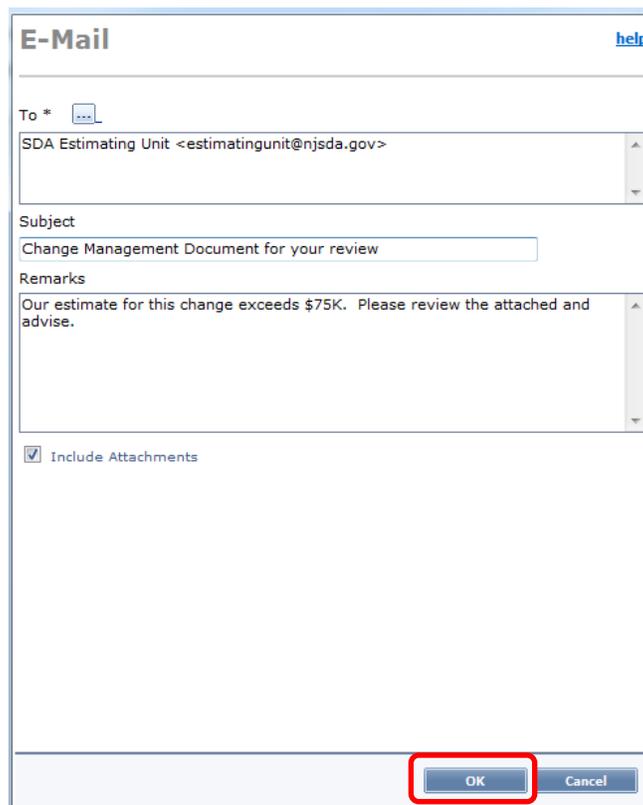
A screenshot of a web form showing a text area labeled "Remarks". The text area contains the text "Our estimate for this change exceeds \$75K. Please review the attached and advise.".

5. Check the **Include Attachments** box at the bottom of the **E-mail** window.



A screenshot of a web form showing a checked checkbox labeled "Include Attachments".

6. Scroll to the bottom of the **E-mail** window and click the **OK** button to submit your e-mail.



A screenshot of the "E-Mail" window. The window title is "E-Mail" with a "help" link. The "To \*" field contains "SDA Estimating Unit <estimatingunit@njsda.gov>". The "Subject" field contains "Change Management Document for your review". The "Remarks" text area contains "Our estimate for this change exceeds \$75K. Please review the attached and advise.". The "Include Attachments" checkbox is checked. At the bottom right, the "OK" button is highlighted with a red rectangle.

## VII. ENTERING A NEW ROUND OF NEGOTIATION

**NOTE:** *If you are beginning from this point, perform the following steps to open the Change Management document:*

- *Log in to Contract Management*
- *Locate your project from the project list*
- *Choose the Change Order Management folder, then choose Change Management*
- *Locate your desired Change Management document from the log and open in edit mode*

1. From the master **Change Management** document, scroll to the **Commitments** section and click the **Edit** icon next to the existing item.

Include	Contract/PQ	Estimated (CCRA) Cost	Time	Date	Quoted (CP) Cost	Time	Date
<input checked="" type="checkbox"/>	◊ Safeway Contracting, Inc. (NT-0032-C02)	◊ \$0.00	0	Oct 18, 2012	◊ \$240,000.00	0	Oct 19,

2. Scroll to the **Negotiated** section, click the **Start new negotiated round** link.

Negotiated (AAR)	
Cost	220000.00
Time Change (days)	0
Document Date	Oct 22, 2012
◊ <a href="#">Found underground storage tank (00001, 10/22/12, Safeway Contracting, Inc)</a>	

3. A new **Authority Agent Recommendation** document will display. From the General tab, edit the **To** and **From** names by using the **select** links on the right side of the screen (this document should be *To* the SDA PO, and is *From* the PMF/CM).

The screenshot shows the 'General' tab of an 'Authority Agent Recommendation' form. The form is titled 'Authority Agent Recommendation: 00002 | New Jersey Schools Development Auth'. The 'General' tab is selected and highlighted with a red box. The form fields are as follows:

Type *	Authority Agent Recommendation
Contract *	Construction (NT-0032-C02)
To *	New Jersey Schools Development Auth Aaron Goss
From *	Epic Management, Inc. William Costello
Number *	00002
Title	Found underground storage tank
Date	Oct 22, 2012
Total Cost	\$220,000.00
Time Change (days)	0

Red boxes highlight the 'To' and 'From' fields and their respective 'select' links (three dots with a dropdown arrow). A red asterisk indicates that these fields are required. The 'Save' and 'Cancel' buttons are visible at the bottom right.

**IMPORTANT:** This is the only opportunity you will have to select the *To/From* names. Once you save the document, you will not be able to edit the names.

4. Click the **Details** tab and enter instructions and/or negotiation details for GC.

The screenshot shows the 'Details' tab of the 'Authority Agent Recommendation' form. The 'Details' tab is selected and highlighted with a red box. The form fields are as follows:

Description	Still need to talk about this estimate. Our internal estimates are lower than your provided estimates. Please review the attached and let's discuss. Estimate from GC attached Your estimate for this change is requested
Spec Section	
Cost Category	Commitment
Cost Type	Pending
Required Date	Oct 29, 2012
Acknowledged Date	
Previous Change Management Phase	Found underground storage tank (00001)
Change Management Number	Found underground storage tank (00131)

The 'Save' and 'Cancel' buttons are visible at the bottom right.

5. Click the **Line Items** tab and click on the **Edit** icon to open the line item.

Authority Agent Recommendation: 00002 | New Jersey Schools Development Auth | Select an action...

General Status Summary **Line Items** Details Schedule SDA Data Issues Attachments

Add Lump Sum Add Unit Price Copy from Contract

Line Item No.	Quantity	Units of Measure	Description	Unit Price	Net Amount	Tax Rate	Sales Tax	Line Item Total
00001					\$220,000.00	0.00000	\$0.00	\$220,000.00

Grid Totals: 0.00 \$220,000.00 \$0.00 \$220,000.00

Save Cancel

3. Enter the revised estimate in the **Lump Amount** field (whole dollar values only, Contract Management will format the decimals when you click on any other field or hit the **Tab** key).

Lump Sum [ << Previous ] [ Next >> ] help

Spelling

Change Proposal Unit

Type Lump Sum

Line Item No. \* 00001

Description

Lump Amount (\$) 210,000.00

Tax Rate 0.00000

Sales Tax (\$) 0.00

Line Item Total (\$) 210,000.00

Material Name ... X

Material Title

Activity ID ... X

Costing top of page

Add Add Multiple Cost Codes Remove Zero Values

Cost Code	Title	Distributed
030	Construction	210,000.00 add balance remove

4. Scroll to the bottom of the **Lump Sum** window and click **Save and Close**. You will return to the Authority Agent Recommendation screen.

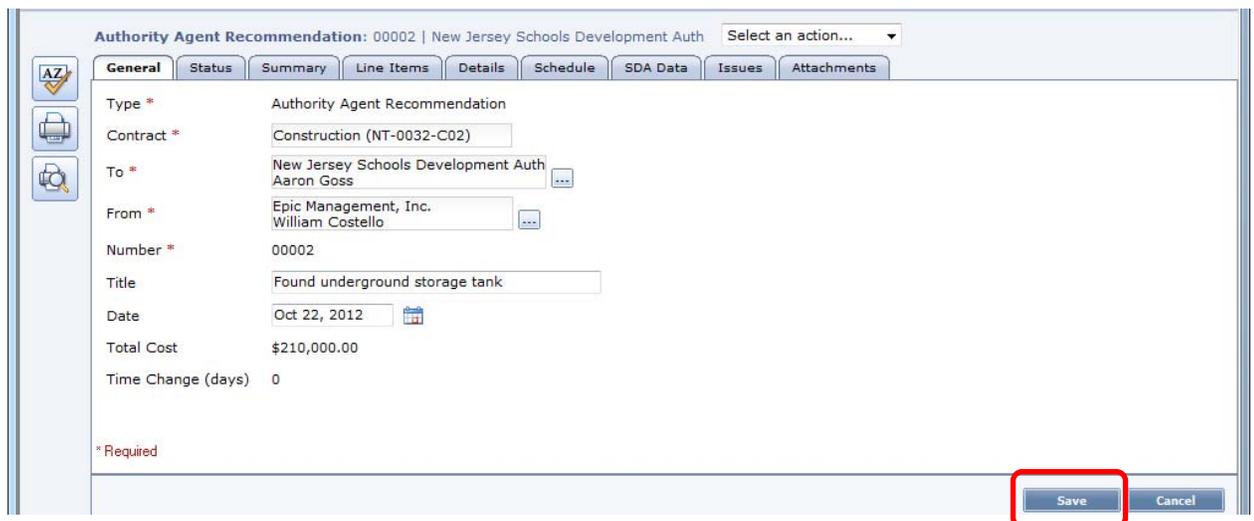


5. The updated item displays in the Line Items tab.



Line Item No.	Quantity	Units of Measure	Description	Unit Price	Net Amount	Tax Rate	Sales Tax	Line Item Total
00001					\$210,000.00	0.00000	\$0.00	\$210,000.00
<b>Grid Totals:</b>		<b>0.00</b>			<b>\$210,000.00</b>		<b>\$0.00</b>	<b>\$210,000.00</b>

6. When all fields on the document are completed, click the **Save** button at the bottom of the document window. Follow the processes as listed on page 57 to print the AAR document (SDA Form 501).



Authority Agent Recommendation: 00002 | New Jersey Schools Development Auth

General Status Summary **Line Items** Details Schedule SDA Data Issues Attachments

Type \* Authority Agent Recommendation

Contract \* Construction (NT-0032-C02)

To \* New Jersey Schools Development Auth  
Aaron Goss

From \* Epic Management, Inc.  
William Costello

Number \* 00002

Title Found underground storage tank

Date Oct 22, 2012

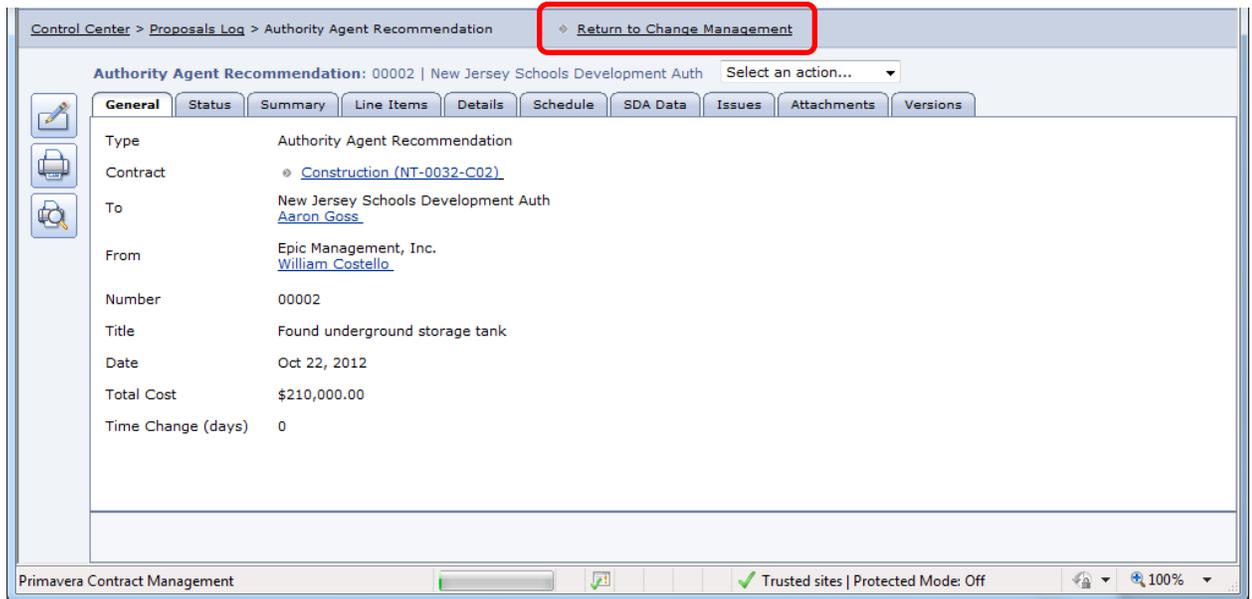
Total Cost \$210,000.00

Time Change (days) 0

\* Required

Save Cancel

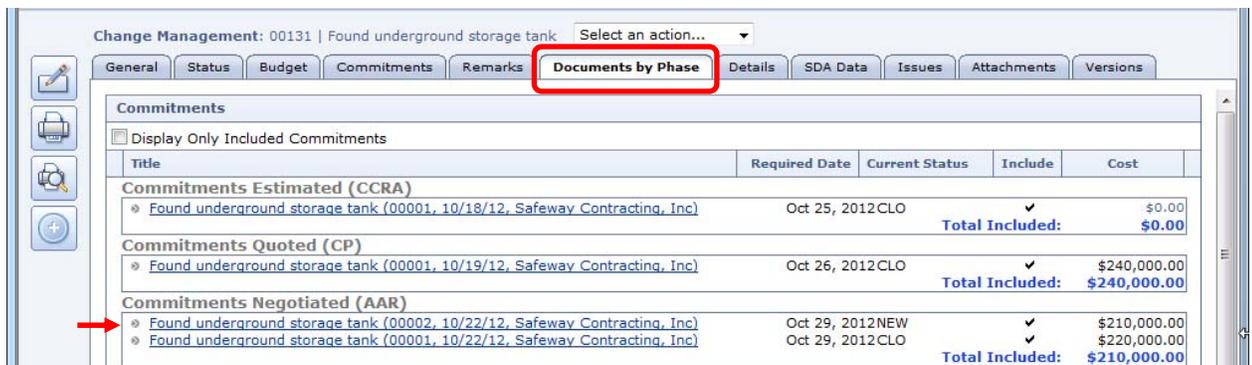
- To return to Change Management, click the **return to Change Management** link on the top of the screen.



The line item is now updated on the **Commitments** tab.



You can also click the **Documents by Phase** tab to see the line item updates.

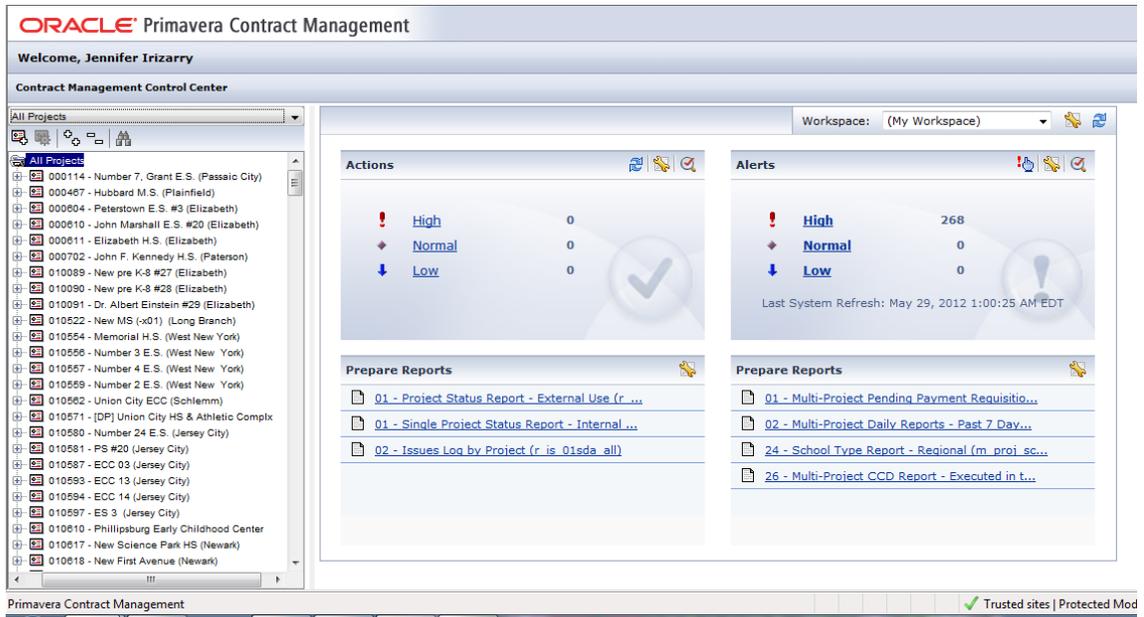


- Repeat this process for as many rounds of negotiations as required.

## VIII. CREATE A NEW CHANGE MANAGEMENT DOCUMENT WITHOUT A REQUEST FOR INFORMATION

While it is desirable to capture all phases of change management beginning with a Request for Information (RFI), it is recognized that change management can be initiated without it. If you need to initiate change management without having an RFI, perform the following steps:

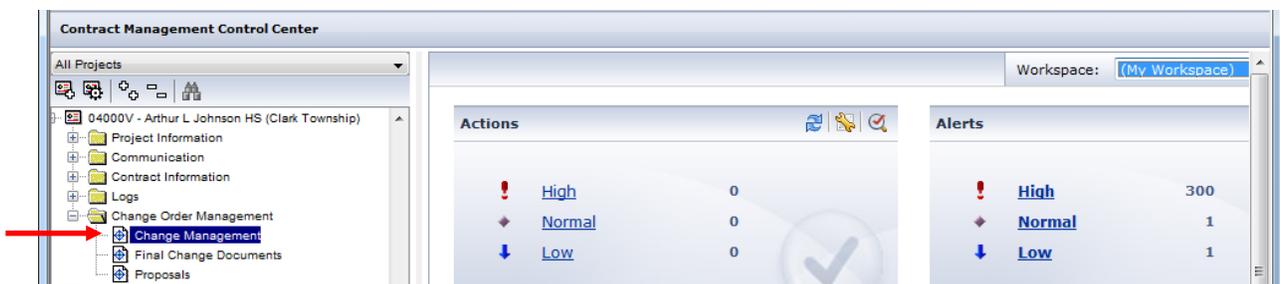
1. Once logged into Contract Management, the Contract Management Control Screen appears (as shown).



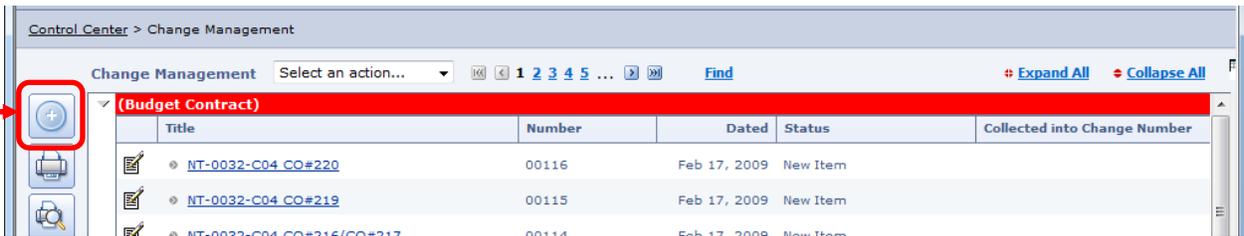
2. Select your desired project.



3. Select the **Change Order Management** folder, and then select **Change Management**.



- When the log view displays, select the **Add Document** button on the left side of the screen to create a new master change management document.



- The new document displays. Contract Management will provide the next available change management number for this document. **Do not change this assigned number.** Adjust the **date** as necessary and enter a **title**. Continue to follow the entry processes as described on page 5.

