

How to add a Change Order for TERO Tax on a contract

Roles: Office Manager, Chief Inspector, Project Engineer, Resident Engineer

Add Change Order

1. Construction > Contract Progress

The screenshot shows the top navigation bar with 'Home', 'Previous', and 'My Pages' dropdowns. On the right, there are 'Actions', 'Help', and 'Log off' buttons. Below the navigation bar, the page title is 'PROJECT MndOT ROLE for Construction Project Engineers'. A blue dropdown menu is open, showing a list of options under 'Construction'. The 'Contract Progress' option is highlighted with a yellow box. Other options include Change Order, Contract Administration, Contract Claims, Contract Permits, Contract Time, Contract Vendor Assets, Contractor Evaluation, Daily Diary, Daily Work Reports, Meetings, Payment Estimate Accounting, Payment Estimate Approval Decisions, and Payment Estimates.

2. Search for the applicable contract

The screenshot shows the 'Contracts Progress Overview' page. The top navigation bar is the same as in the previous screenshot. Below it, the page title is 'Contracts Progress Overview'. A blue dropdown menu is open, showing 'Contract-Global Progress Overview' with a 'Save' button and a help icon. Below the dropdown, there is a search bar with the text '160147' and a magnifying glass icon. To the right of the search bar is a dropdown menu set to 'System Default' and the text 'Showing 1 of 1'. Below the search bar, there is a table with the following data:

Contract	Description	Prime ID	Prime Name
160147	LOCATED ON TH 59, 4 MI SO OF BUFFALO RIVER	0000207897	Central Specialties, Inc.

At the bottom right of the table area, there is text that reads '0 marked for deletion | 0 changed'.

3. Click the Change Orders tab

4. Click Add to add a Change Order

5. Enter TERO Tax in the Description box

And select the following:

- **Change Order Type:** COLevel1 – Change Order Level 1
- **Reason:** Allowed by Contract – Changes allowed by Specification or special provisions, including, but not limited to predetermined prices for incentives, disincentives, and material failures (Use with Change Order Level 1)

Click **SAVE**

Contract-Global: 150171 - GRADING, BITUMINOUS MILL AND OVERLAY

General

Change Order Date: 11/08/2017

Description: TERO Tax

MnChangeOrder Type: COLevel1 - Change Order Level 1

Author: MnAdiZutz1Lee

Reason: Allowed by Contract - Changes allowed by Specifica...

Explanations: 0

MnChangeOrder Revision Number

Approval Date

Entered By

Entered Date

Current Approval Round

6. After Save on screen above, more tabs and fields are available. On the bottom of the General Tab, fill in Change Order Explanations:

Issue: Special Provision S-X.y requires payment of TERO Tax which will apply to Y% of the total bid amount of the Contract.

Resolution: The Department will compensate the Contractor as provided in 1402.5 based on the TERO Tax invoice and upon submittal of the MnDOT Indian Employment Tracking form.

Entitlement: Special Provision S-X.y and 1402.5

Impact: No impact.

Cost: Planned Contingency.

Order	Reference Explanation Name	Explanation Description	Supp Explanation
1	Issue	Issue:	Special Provision S-X.y requires payment of TERO Tax which will apply to Y% of the total bid amount
3	Resolution	Resolution:	The Department will compensate the Contractor as provided in 1402.5 based on the TERO Tax invoice and upon submittal of the MnDOT Indian Employment Tracking form.
5	Entitlement	Entitlement for this change is:	Special Provision S-X.y and 1402.5
7	Impact	The impact to the project or schedule is:	No impact.
9	Cost	The cost of this change is justified by:	Planned Contingency

Click **SAVE**

7. Click on New Items on left side of screen. Next, click on Select New Item

Contract-Global MnChangeOrd Save Complete

Contract-Global: 160147 - LOCATED ON TH 59, 4 MI SO OF BUFFALO RIVER TO 440TH ST SE. Save

MnChangeOrder: 0013 - TERO Tax Amount: Status: Draft

General

Increase/Decrease Items

New Items

Time Adjustments

Contract Claims

Review Tracking

Approval Tracking

Force Accounts

Plan Discrepancies

New Items

Type search criteria or press Enter Advanced

Projects No Filter

Select New Item...

0 marked for deletion | 0 changed

No rows found matching criteria.

Contract Items

8. Search for the 1402621/00030 CHANGE ORDER TERO DOL – Dollar and select the appropriate project/category.

Select New Item

Reference Item * Unit of Measure

1402621/00030 DOL - Dollar

CHANGE ORDER TERO DOL - Dollar

Type search criteria or press Enter Advanced Showing 4 of 4

Projects No Filter Categories No Filter

Select: All None 1 selected

Project	Project Description	Category	Category Description
✓ 111304	GRADING, BITUMINOUS MILL & OVEF	0001	SP 0305-34
116583	GRADING, BITUMINOUS MILL & OVEF	0001	SP 4404-13
117188	GRADING, BITUMINOUS MILL & OVEF	0001	SP 6008-15
121363	GRADING, BITUMINOUS MILL & OVEF	0001	SP 4403-17

Add to Change Order

- After adding the item, it will show in the item list and expand by clicking on > (to expand the row, if needed)

▼ New Items

Advanced

Projects
No Filter ▼

0 marked for deletion | 0 changed

Select New Item...

Proj Item Ln Num	Cont Item Ln N...	Item - Descr	Supp Descr	Unit	✕
		1402621/00030 -	CO# X - TERO Tax	DOL - Dollar	
Proj - Descr	Cat - Descr	Qty	Price		
▼ -	0001 - SP 0305-34	11,792.500	1.00000		
Ext Amt					

Project Item Line Number * ▼

Unit Price * ▼

Contract Item Line Number * ▼

Extended Amount

Quantity * ▼

Supplemental Description * ▼

Item Source

ChangeOrder

Item Reason * ▼

Funding * ▼

Contractor ▼

▶ Change Order New Item Explanations

- Enter the following information:
 - Quantity*: TERO Tax dollar amount
 - Funding*: User must ensure that Funding field matches what was selected when adding the item to the contract.
 - Unit Price*: \$1
 - Supplemental Description: CO (appropriate #) – TERO Tax
 - Item Reason: PC-TERO Tax – Planned Contingency – TERO Tax
 - Contractor Name: leave field blank

Click **SAVE**

Approve the Change Order

- Submit for approval, then approve.
- OCIC then Approves.

Change Order Payment

- To make payment, project staff must create a DWR and a posting to the 1402621/00030 TERO Tax.