

CHANGE ORDER PROCESSING INSTRUCTIONAL GUIDE & STANDARD CHANGE ORDER LANGUAGE

Rev. 2/24/2023

This document contains instructions on how to complete the change order process, as well as minimum standard language for agency use when issuing a change order. The *Compliance Verification Requisition Submission Checklist* (a.k.a. Requisition Compliance Checklist) is required with all requisitions, as well as any required supporting documentation (i.e. two-party agreement, new pricing pages, etc.).

Agencies are encouraged to add details to the standard language as needed to clearly reflect the reason for the change. When preparing a requisition for a change order, agencies should customize the language (the **Xs** in red) with its specific change order information, fill in any blanks (_____), and enter the language in the specific change order's Modification Tab **AND** Extended Description field within *wvOASIS*. Failure to do so may result in a rejection of the requisition back to the agency.

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Change Order Instructional Guide

<p>Before Getting Started</p>	<ul style="list-style-type: none"> • <u>Allow enough lead time</u> for the change order to be processed prior to the original contract's expiration • <u>Review the language of the original contract</u> to determine if renewals remain and how many, as well as, which change order the current change order would be. You will use this information in the requisition language for the change order. • Most change orders, unless administrative in nature, require a two-party agreement. Before the procurement officer proceeds with the requisition in wvOASIS, he or she should <u>send the renewal letter to the vendor</u> with the change order information, including the contract number, renewal dates, and the procurement officer's signature. The vendor should sign and date the letter, returning it to the agency. <p>If the change includes new pricing or other changes, the vendor will likely send in the new catalog or other supporting documentation for the change with the renewal letter.</p> <ul style="list-style-type: none"> • <u>Check the vendor's compliance</u> with the required state agencies, including the Purchasing Division's vendor registration program, Secretary of State, and Sam.gov debarment. If the vendor is not currently in compliance, work with that vendor to make the appropriate contacts and/or get registered. • <u>Complete the Compliance Verification Requisition Submission Checklist</u>. This will need to be submitted with the requisition either in wvOASIS or by sending it to your agency's assigned Purchasing Division buyer.
<p>Creating the Requisition in wvOASIS</p>	<p>Log in to wvOASIS. Click Search on the left-hand column, then Document Catalog. Search for the contract you will be renewing using the Code and ID fields. If there is more than one version listed (i.e. if there are already existing change orders for that contract), select the most recent one.</p> <p>Once open, click on the Edit option at the bottom, left corner of the page. That will create the next version of the change order and put the document in Draft mode so that you can make edits.</p>
<p>General Information Tab</p>	<p>In this tab, the document name will remain the same, as well as the beginning date of the contract. The only thing that should change on this tab is the end date. That date will be based on the term outlined in the original contract. In most cases, the standard renewal period is one year, so only the year on the end date will need to be changed.</p>

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<p>Modification Tab</p>	<p>On this tab, add the standard language (found in this document) into the box with the number for the current change order (i.e. if it is the first change order, you would put Change Order No. 1, the second change order would be Change Order No. 2, etc.) and the reason for the change (i.e. to renew the contract).</p>
<p>Extended Description Tab</p>	<p>On this tab, remove the language carried over from the original contract first. Locate the appropriate standard change order language from the document below, copy and paste it into the Extended Description field, and update it to reflect the current change order for your agency.</p> <p>A standard renewal may include but not be limited to the change order number, the new effective and expiration date (the new effective date should be the day following the current contract or change order’s expiration date since it is specific to the date of renewal only, not the entirety of the contract), and the number of renewals remaining.</p>
<p>If Maintenance is Needed for a CCT</p>	<p>If annual maintenance is included in the original contract and must be added to the change order, go to the Commodity screen by clicking the Commodity option in the Document Navigator list. Click the Copy Line icon on the commodity line to add another line. In the General Information tab, update the description (for example, add “Software Maintenance” and the service year for the maintenance, such as “Service Year 2”) in the CL Description field. Once the information on that tab has been updated, click on the Validate button at the bottom of the page.</p>
<p>Terms and Conditions</p>	<p>It should say “ATTACH” in the drop-down field. No changes to this page are required. Click Save and then Validate at the bottom of the page. If validated successfully, you will get a yellow bar with a note at the top of the page informing you of the successful validation.</p>
<p>Assemble Documents</p>	<p>Go back to the Header. Click on the Related Actions menu, then choose Assemble Document. From there, click on Submit Assemble Request. Once you get to the Assemble Request page, click on View Job Log Messages and then Refresh. Once the documents load and you see the Run Ended Memo at the bottom of the list, you have assembled the documents.</p> <p>To verify that the documents assembled correctly, click OK, then Back. Then click on the dropdown menu beside the Phase: Draft option at the top of the page. From there, choose Document Attachments. The assembled document should show up as the last document in the header, with “Draft” in front of the contract number.</p> <p>Click Submit once you have reviewed and verified all information in the new document.</p>

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Standard Change Order Language for Renewals

Standard Renewal

The language below is generally used when an agency plans to renew a contract with a vendor according to the original terms, conditions, prices, specifications, and any authorized change orders. A standard renewal requires a two-party agreement between the vendor and the agency, as well as a copy of the *Requisition Compliance Checklist*.

<u>Modification Tab</u>	Change Order XX To Renew Contract
<u>Extended Description</u>	<p>Change Order</p> <p>Change Order No. XX is issued to renew the original contract according to all terms, conditions, prices, and specifications contained in the original contract, including all authorized change orders.</p> <p>Effective date of renewal _____ through _____.</p> <p>(Choose one) Renewal Years Remaining: _____ OR Months Remaining: _____</p> <p>No other changes.</p>

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Standard Change Order Language for Renewals

Renewal with Increase

The language below is generally used when an agency plans to renew a contract with a vendor according to the original terms, conditions, prices, specifications, and any authorized change orders but with increased pricing. A standard renewal with increased pricing requires a two-party agreement between the vendor and the agency, as well as a copy of the *Requisition Compliance Checklist*.

<u>Modification Tab</u>	Change Order XX To Renew and Increase Contract
<u>Extended Description</u>	<p>Change Order</p> <p>Change Order No. XX is issued to renew the original contract according to all terms, conditions, and specifications contained in the original contract and all authorized change orders, except that the contract _____ (i.e. unit prices, hourly rates, annual fee, etc.) is increased as defined in the attached documentation.</p> <p>Effective date of renewal XX/XX/XXXX through XX/XX/XXXX.</p> <p>(Choose one) Renewal Years Remaining: _____ OR Months Remaining: _____</p> <p>Original Contract Total: \$XX,XXX.XX Change Order No. XX Increase (\$ XXX.XX)</p> <p>New Contract Total: \$XX,XXX.XX</p> <p>No other changes.</p> <p>All provisions of the original Contract and subsequent Change Orders not modified herein shall remain in full force and effect.</p>

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Standard Change Order Language for Renewals

Renewal with Decrease

The language below is generally used when an agency plans to renew a contract with a vendor according to the original terms, conditions, prices, specifications, and any authorized change orders but with decreased pricing. A standard renewal with a decrease requires a two-party agreement between the vendor and the agency, as well as a copy of the *Requisition Compliance Checklist*

<u>Modification Tab</u>	Change Order XX To Renew and Decrease Contract
<u>Extended Description</u>	<p>Change Order</p> <p>Change Order No. XX is issued to renew and decrease the original contract according to all terms, conditions, and specifications contained in the original contract and all authorized change orders, except that the contract _____ (i.e. unit prices, hourly rates, annual fee, etc.) is decreased as defined in the attached documentation.</p> <p>Effective date of renewal XX/XX/XXXX through XX/XX/XXXX.</p> <p>(Choose one) Renewal Years Remaining: _____ OR Months Remaining: _____</p> <p>Original Contract Total: \$XX,XXX.XX Change Order No. XX Decrease (\$ XXX.XX)</p> <p>New Contract Total: \$XX,XXX.XX</p> <p>No other changes.</p> <p>All provisions of the original Contract and subsequent Change Orders not modified herein shall remain in full force and effect.</p>

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Standard Change Order Language for Renewals

Notice to Proceed

The language below is generally used when an agency needs to establish effective start and end dates for a contract. These dates are the dates during which the vendor may perform work on the contract. A two-party agreement is not required to issue a Notice to Proceed but the agency must still submit the *Requisition Compliance Checklist* with the requisition.

<u>Modification Tab</u>	Change Order XX To Issue Notice to Proceed
<u>Extended Description</u>	Change Order XX To establish the contract effective start and effective end dates, and to issue the Notice to Proceed for the contract according to all terms, conditions, prices, and specifications contained in the original contract, including all authorized change orders. Contract Term: XX/XX/XXXX through XX/XX/XXXX

Construction Extension of Time Only

The language below is generally used when an agency needs to add additional time to a contract to allow the vendor time to complete the work. There are no other changes with this renewal besides that of time. A change order for construction with extension of time requires a two-party agreement between the vendor and the agency, as well as a copy of the *Requisition Compliance Checklist*.

<u>Modification Tab</u>	Change Order XX To Extend Contract
<u>Extended Description</u>	Change Order Change Order No. XX is issued to extend the original contract to XX/XX/XXXX according to all terms, conditions, prices, and specifications contained in the original contract including all authorized change orders. The extension of this contract is provided to complete the project OR for payment purposes only. Effective Date of Change: XX/XX/XXXX No other changes.

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Standard Change Order Language for Renewals

Construction Extension of Time and Increase or Decrease

The language below is generally used when an agency needs to extend a contract with all terms, conditions, specifications, and approved change orders of the original contract but with increased or decreased pricing or other factors as indicated in attached documentation. A change order for construction with an extension of time and an increase or decrease requires a two-party agreement between the vendor and the agency, as well as a copy of the *Requisition Compliance Checklist*.

<u>Modification Tab</u>	Change Order XX To Extend and (Choose one) Increase/Decrease Contract
<u>Extended Description</u>	<p>Change Order</p> <p>Change Order No. XX is issued to extend the original contract to XX/XX/XXXX according to all terms, conditions, and specifications contained in the original contract, including all authorized change orders, along with (Choose one) increased/decreased pricing per the attached documentation. The extension of this contract is provided to _____ (insert reason) (i.e. add additional items, excavation quantities, etc.).</p> <p>Effective Date of Change: XX/XX/XXXX</p> <p>Extend Contract From: XX/XX/XXXX To: XX/XX/XXXX</p> <p>Original Contract Price: _____</p> <p>(Choose one) Change Order No. XX Increase: _____ OR Change Order No. XX Decrease: _____</p> <p>Contract New Total: _____</p> <p>No other changes.</p>

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Standard Change Order Language for Cancellations

Entire Contract/Purchase Order

The language below is generally used to cancel a contract/purchase order in its entirety and any funds associated with it. Once completed, the contract is no longer active for the agency's use.

If this is a mutual cancellation, a two-party agreement between the vendor and the agency is required. If not, the Purchasing Division may issue a change order to cancel the contract with 30 days' notice.

A copy of the *Requisition Compliance Checklist* is required.

<u>Modification Tab</u>	Change Order XX To Cancel Contract
<u>Extended Description</u>	Change Order Change Order No. XX is issued to cancel this contract/purchase order in its entirety and all funds associated with the contact. Effective date of cancellation: XX/XX/XXXX

Partial Cancellation Change Order

The language below is generally used to cancel some but not all parts of a contract/purchase order and funds associated with those parts. This partial cancellation typically refers only to the uncompleted scope of work or commodities not delivered, and the funds associated with the work or items. This has no effect on the remaining goods or services on the contract, and all original terms and conditions still apply.

If this is a mutual partial cancellation, a two-party agreement between the vendor and the agency is required. If not, the Purchasing Division may issue a change order to cancel the part of the contract in question with 30 days' notice.

A copy of the *Requisition Compliance Checklist* is required.

<u>Modification Tab</u>	Change Order XX Partial Contract Cancellation
<u>Extended Description</u>	Change Order No. XX is issued to cancel this contract/purchase order for uncompleted scope of work OR undelivered commodities and funds associated with the work OR undelivered commodities . All remaining provisions of the original contract and subsequent change orders not modified herein shall remain in full force and effect. Effective date of cancellation: XX/XX/XXXX

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Standard Change Order Language for Administrative Changes

Name Change Requiring Memorialization of Original Contract and Issuance of Contract Reflecting New Name

The language below is generally used when a vendor name change has occurred, regardless if a new Federal Employer Identification Number is assigned. This is referred to as an administrative change. The name change does not require any change to the terms, conditions, prices, specifications, or any approved change orders of the original contract. However, system limitations do require that the contract reflecting the new name be given a new contract number moving forward. A copy of the *Requisition Compliance Checklist* is required.

There are two separate statements that should be used, one to cancel the original contract and the other to publish the new contract.

<u>Modification Tab</u>	Change Order XX To Re-issue Contract
<u>Extended Description</u>	<p><u>Language used to cancel the contract prior to re-issue:</u> Change Order XX</p> <p>Change Order No. XX is issued for administrative purposes only and is intended to change the name of the vendor from Vendor A (V/C account 0000*) to Vendor B (V/C account 0000*). System limitations require that this contract be given a new number moving forward but the original contract, including all terms, conditions, prices, specifications, and change orders contained therein remain in full force and effect.</p> <p>Effective date of change: XX/XX/XXXX</p> <p>New procurement folder: _____</p> <p>No other changes.</p> <p><u>Language used in the requisition for the re-issued contract:</u> This contract, identified as _____, is created for administrative purposes only and is intended to change the name of the vendor identified in Contract No. _____ from Vendor A (V/C account 0000*) to Vendor B (V/C account 0000*). System limitations require that this contract be given a new number moving forward but the original contract, including all terms, conditions, prices, specifications, and change orders contained therein remain in full force and effect.</p> <p>Effective date of change: XX/XX/XXXX</p> <p>Old procurement folder: _____</p> <p>No other changes.</p>

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When a Change Order is Required Due to Address Change (No Reissue Required)

The language below is generally used to change a vendor's address. This change does not require a new contract or contract number. All terms, conditions, prices, specifications, and change orders remain in full effect.

A copy of the *Requisition Compliance Checklist* is required.

<u>Modification Tab</u>	Change Order XX Vendor Name Change
<u>Extended Description</u>	<p>Change Order XX</p> <p>Change Order No. XX is issued for administrative purposes only and is intended to change the address of the vendor as indicated below. The original contract, including all terms, conditions, prices, specifications, and change orders contained therein remain in full force and effect.</p> <p>New Address: _____ _____</p> <p>Old Address: _____ _____</p> <p>Effective date of change: XX/XX/XXXX</p> <p>No other changes.</p>

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Standard Change Order Language for Administrative Changes

Closeout/Rescinding of Unused Funds

The language below is generally used when a contract has run its course but funds remain. This administrative change, which requires a two-party agreement, invalidates the remaining funds previously approved for the contract, making them available to the agency for other projects as needed.

A copy of the *Requisition Compliance Checklist* is required.

<u>Modification Tab</u>	Change Order No. XX is issued to reduce the _____ (i.e. hours, unused balance, etc.) per the attached documentation
<u>Extended Description</u>	<p>Change Order No. XX is issued to reduce the _____ (i.e. hours, unused balance, etc.) on delivery order from XX to XX (i.e. actual used hours, unused balance, etc.) per attached document:</p> <p>Original Contract Total: \$XX,XXX.XX Change Order No. XX Decrease: (\$ XXX.XX)</p> <p>New Contract Total: \$XX,XXX.XX</p>