

Module 9: Create a subcontractor change order

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- After logging into CMiC, click on the blue field button
- Click on "Subcontractor Management"
- Click on "Subcontract"
- Select the Subcontract



CMiC FIELD

02171.00 - CMiC Playbook Job

Program Search... [Settings]

Project: CMiC Playbook Job (02171.00)

Workflow Notification

Job Setup

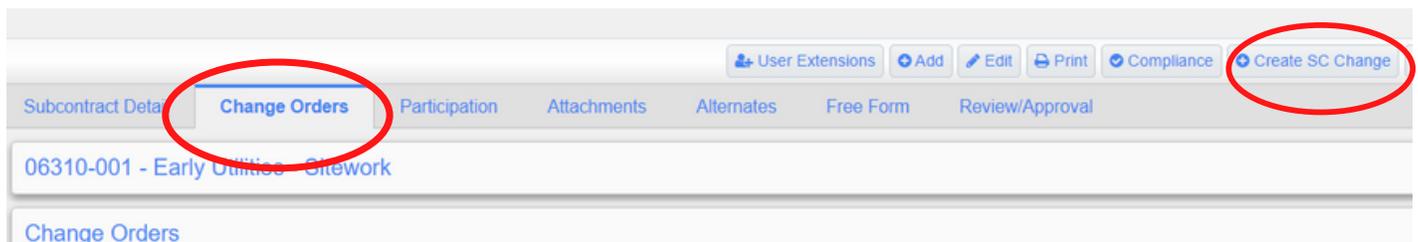
Subcontract Management

Subcontract

Contract No. ↑	Description	Vendor	Ori	Arr
02171.00.0001	This is a subcontract for the playbook	Diversified Construction Group LLC		

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- Click on "Change Orders"
- Click on "Create SC Change"



User Extensions Add Edit Print Compliance Create SC Change

Subcontract Details Change Orders Participation Attachments Alternates Free Form Review/Approval

06310-001 - Early Utilities - Sitework

Change Orders



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- **Scroll down to the Schedule of Values**
- **Click "Add PCIs"**

Schedule of Values

Action	Item Code*	Task Name	Unit	Rate	Amount	Job*	Phase
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Add PCIs

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- **Select the PCI**
- **Click "Close"**
- **Click "Save"**

***NOTE- Wait for signatures before posting**

Available PCIs

Select	PCI No.	Task Name	Unit	Rate	Quoted Amount	Amount	Job	Phase	Category	W/M	Days Impact	PCI Status	Long Descri
<input type="checkbox"/>	CTG-001	CMiC Change Order #1			.00	457.00	02171.00	090190.91	S	LS	0	ACO	CMiC Chang
<input type="checkbox"/>	CTG-001	CMiC Change Order #1			.00	-457.00	02171.00	090190.91	S	LS	0	ACO	CMiC Chang

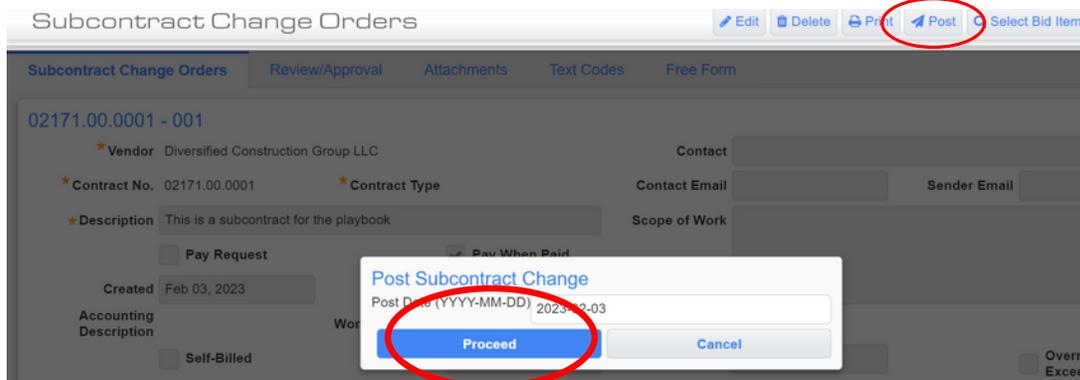
Available PCIs with TBD



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- Click "Post"
- Click "Proceed"

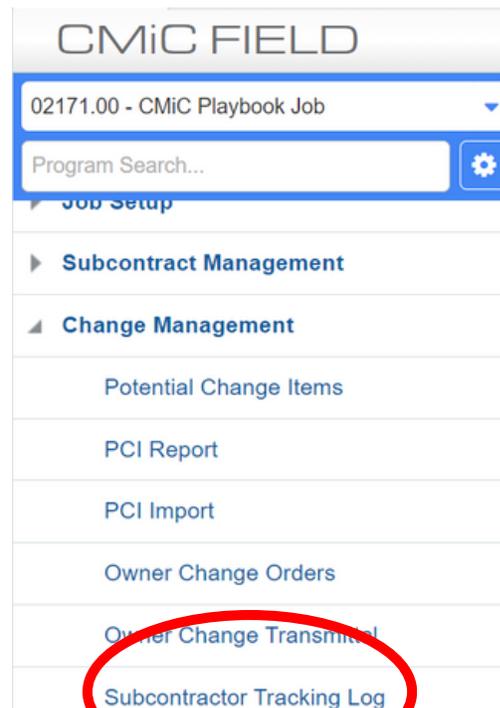


***NOTE: For PCIs designated "Type: Scope Change", the PCI will be posted through an owner change order.
([See Module 8 for owner change order posting](#))**

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To review a posted change order:

- Click on "Change Management"
- Click on "Subcontractor Tracking Log"



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- **This is a log of the status of change orders**
 - **PCI post date**: Date the PCI was posted and when it is hitting the budget
 - **OCO#**: Owner Change Order the Subcontractor Change Order is linked to
 - **SCO#**: Subcontractor Change Order that can be clicked into
 - If there is no Contractor Post Date then the subcontractor change order has not been posted yet.
 - If the information is **blue**, then the link to that item is live

Subcontractor Tracking

PCI Type	PCI No.	PCI Post Date	Owner Reference Number	Subcontractor Reference Number	OCO #	SCO #	Contract Post Date
Out of Scope Change	PCO001	Nov 15, 2022			OCO-0001	06311.0250-001	Nov 14, 2022
Out of Scope Change	PCO002	Nov 15, 2022			OCO-0001	06311.0250-002	Nov 14, 2022
Out of Scope Change	PCO004	Nov 15, 2022			OCO-0001	06311.0212-001	Nov 15, 2022
Out of Scope Change	PCO060	Nov 15, 2022			OCO-0001	06311.0213-001	
Out of Scope Change	PCO092	Nov 15, 2022			OCO-0001	06311.0221-001	
Out of Scope Change	PCO092	Nov 15, 2022			OCO-0001	06311.0227-001	Nov 15, 2022
Out of Scope Change	PCO092	Nov 15, 2022			OCO-0001	06311.0213-001	
Out of Scope Change	PCO092	Nov 15, 2022			OCO-0001	06311.0228-001	Nov 15, 2022
Out of Scope Change	PCO092	Nov 15, 2022			OCO-0001	06311.0226-001	
Out of Scope Change	PCO093	Nov 15, 2022			OCO-0001	06311.0207-001	Nov 15, 2022
Out of Scope Change	PCO094	Nov 15, 2022			OCO-0002	06311.0214-001	Nov 15, 2022
Out of Scope Change	PCO095	Nov 15, 2022				06311.0207-002	Nov 15, 2022
Out of Scope Change	PCO096	Nov 15, 2022				06311.0207-003	



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*NOTE:

- To post a SCO that has not been posted yet,
 - Go to "Subcontract Management-->"Subcontract" in the treeview
 - Select the subcontract
 - Click on the "Change Orders" tab
 - Click on "Create SC Change"
 - Click on "Add PCIs"
 - Check off selected PCIs
 - Click "Save" and "Post"

The screenshot shows the CMIc Enterprise - LIVE interface. The main window is titled "Subcontract Entry" and displays details for subcontract "06372.0012 - Glazing". The "Change Orders" tab is selected and circled in red. Below the tab, there is a table for "Change Orders" with columns "Change No." and "Description", and a note "No Records Found". To the right, there is a "Subcontract Change Orders" form with a "Schedule of Values" section containing an "Add PCIs" button, which is also circled in red. Other sections include "Summary" and "Prequalification".

- When referencing back to the tracking log, there will be a post date for any subcontractor change orders that have been posted.

Subcontractor Tracking

Search...

Reset

Drag a column header and drop it here to group by that column

PCI Type	PCI No.	PCI Post Date	Owner Reference Number	Subcontractor Reference Number	OCO #	SCO #	Contract Post Date
Out of Scope Change	PCO001	Nov 15, 2022			OCO-0001	06311.0250-001	Nov 14, 2022
Out of Scope Change	PCO002	Nov 15, 2022			OCO-0001	06311.0250-002	Nov 14, 2022
Out of Scope Change	PCO004	Nov 15, 2022			OCO-0001	06311.0212-001	Nov 15, 2022
Out of Scope Change	PCO060	Nov 15, 2022			OCO-0001	06311.0213-001	
Out of Scope Change	PCO092	Nov 15, 2022			OCO-0001	06311.0221-001	
Out of Scope Change	PCO092	Nov 15, 2022			OCO-0001	06311.0227-001	Nov 15, 2022



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****NOTE:**

To void a subcontractor change order

- **Click on "Subcontract Management"**
 - **Click on "Subcontract Change Orders"**
- **Select the PCO you want to unpost**
- **Click "Void"**
- **Click "Proceed"**

The screenshot shows a software interface for managing subcontract change orders. At the top right, there are buttons for 'Edit', 'Print', 'Void', and 'Add SO'. The 'Void' button is circled in red. Below this, a modal dialog box titled 'Void Subcontract Change' is displayed. It contains a 'Void Date (YYYY-MM-DD)' field with the value '2022-11-16'. At the bottom of the dialog, there are two buttons: 'Proceed' (highlighted with a red circle) and 'Cancel'. The background shows details for a subcontract change order, including 'Vendor: Allan Construction LLC.', 'Contract No. 06311.0228', and 'Description: CMIC Playbook - Sub CO Un...'.

- **Click on "Potential Change Items"**
- **Select the PCO you want to unpost**
- **Click "Unpost"**
- **Click "Yes"**

The screenshot shows a software interface for managing potential change items. At the top right, there are buttons for 'Modify PCI', 'Add PCI', 'Copy', 'Edit', 'Print PCI', 'Quick Print', and 'UnPost'. The 'UnPost' button is circled in red. Below this, a modal dialog box titled 'Confirm Post' is displayed. It contains the text: 'Do you really want to unpost PCI PCO-003? WARNING: If a JB Draw/Revision is in process, it must be manually Deleted & Recreated via "Prepare Billing" program to reflect the currently unposted PCI.' At the bottom of the dialog, there are three buttons: 'Yes' (highlighted with a red circle), 'No', and 'Cancel'. The background shows details for a potential change item, including 'Type: Scope Change', 'Status: Approved', 'Date: Nov 16, 2022', and 'Total Budgeted Amount: 3,216.75'.

