## To add contract sampling and testing requirements for items added by change orders

After a change order is approved, make any needed contract specific modifications to the sampling and testing requirements. When a change order is approved, global S&T requirements are automatically added to Contract S&T. Modify based on proposal specifications, project plans or the addition or modification to a contract item via a change order.

- 1. REG Operations Supervisor agrees to allow contractor to install material not associated to an item on the contract. Begin to draft change order with the Extra Work function selected.
- FIELD Operations Supervisor sends an email to the REG - M&T Supervisor to notify them of the material being used.
- REG M&T Supervisor identifies tests to be performed and samples to be taken for the type of material on that item.
  REG - M&T Supervisor replies to the email with requirements for sampling and testing.
- For items not available on a contract, FIELD - Operations Supervisor informs FIELD - Operations Inspector to use "SiteManager Loose Leaf Forms" to document work. Also, inform FIELD - Operations Inspector to log sample records, but not to associate sample records to contracts.
- 4. Once a change order with the Extra Work function selected reaches firstlevel approval, [Customization: MTC025] notifies REG - M&T Office Staff that a new item may be added to the contract.
- 5. Once a change order reaches final approval, [Customization: MTC024] notifies REG M&T Office Staff that a new item has been added to the contract.
- 6. If "SiteManager Loose Leaf Forms" were used in Step 4, FIELD -Operations Office Staff and FIELD - Operations Inspector use Daily Work Reports window's attachment function to attach "SiteManager Loose Leaf Forms" as an OLE.
- 7. REG M&T Supervisor reviews and modifies contract sample and testing requirements for materials associated to the new item.
- 8. REG M&T Supervisor emails FIELD Operations Supervisor that the contract sampling and testing requirements have been established for materials associated to the new item.
- 9. FIELD Operations Supervisor notifies the appropriate personnel.

- 10. For any samples recorded prior to the change order being approved, all sample creators associate all samples previously recorded to the appropriate contracts—as soon as possible.
- 11. We now open the *Contract Sample and Testing Requirements* window:

👫 Site	eManage	er Panel		<b>—</b>
		Main Panel	Materials Management(+)	Contract Materials(+)
0	Contract Aaterials	Contract Sampling and Testing		

12. Find each item added by the change order by matching the "*Line Item Number*"

Contract		4PILOT	
Project/Line I	tem	36001	-3290-14, 0460, STRE
ind :			
Project/Line Item			
Project Number	Line Item Number		Line Number
36001-3290-14	0460	0 00	STREA
36001-3290-14	0470	0 10	STRE/
36001-3290-14	0480	0 20	STREA
36001-3290-14	0490	0 30	STREA
36001-3290-14	0500	0 40	PLACI
36001-3290-14	0510	0 50	SEDIM
	III		

In the *Contract Sample and Testing Requirements* window, REG - M&T Supervisor associates the proper materials in place of the placeholder material to the contract item, sets the conversion factor, and associates appropriate tests.

 REG - M&T Supervisor deletes the placeholder material, 999.999 – No Test Assigned from the Contract Sample and Testing Requirements window.

Combra at Commute	and Testing Requireme					
Materials	Sample and T					
Contract 4PILOT	Project 36001-3290	0-14 Line Ite	m Nbr 0350	Bid Item Cod	le 203-01.79	
Item Unit C.Y.						
Proposal Line Nbr:	,					
Desc. 1:	EXCAVATION/BACKFILI	L				
Desc. 2:						
Supp Desc1						
Supp Desc2						
Material Code	Material Full Name		Stat	us Mater	rial Short Name	
999.99.999	No Test Assigned		A	No Te	st Assigned	
Conversion Fact	·		Approved Sourc	•		
	or: 1.00000 ity: 25.000		-	•		×

- 14. Next the correct material(s) and test(s) need to be added to the item.
  - i. Click the "New" icon at the top of the window.
  - ii. Enter material code, conversion factor, and Special Instruction (special instruction is optional) and save. NOTE: use zero conversion factor if you do not want money withheld from the contractor if all tests are not performed.

Materials	Sample	and Testing			
ontract 4PILOT	Project 3600	-3290-14 Line Item Nbr 0	350 Bid It	em Code 203-01.79	
tem Unit C.Y.					
Proposal Line Nbr:		WEILL			
Desc. 1: Desc. 2:	EXCAVATION/BAI	.KFILL			
Supp Desc. 2.	1				
Supp Desc2	ć				
Material Code	Material Full Na	ne	Status	Material Short Name	
205.04.001				Unclass Embankment	
	Embankment Mate	lai (unclassilied)			
	<b>de:</b>  205.04.001	Embankment Material (U	Inclassified) Source Req		
Material Co	de: 205.04.001 tor: 1.00000	Embankment Material (U	Source Req		

iii. Next, click on the *Sample and Testing* tab. Select the new icon and enter data for each test that will be required for the material.

aa .	1.77.10				
Contract Sample a					
Materials	Sample	and Testing			
ontract 4PILOT	Project 3600	1-3290-14 Line Item	Nbr 0350 Bid	Item Code 203-01.79	1
em Unit C.Y.	• ,			,	
roposal Line Nbr: 🛛	0370				
Desc. 1:	EXCAVATION/BA	CKFILL			
Desc. 2:					
Supp Desc1					
Supp Desc2					
Naterial Code	Material Full Na	ime	Status	Material Short Name	•
205.04.001 E	Embankment Mate	erial (Unclassified)		Unclass Embankment	
Producer Sug	oplier Code	Sample Type		septance method	Test Method
Producer Sup	oplier Code	Information Only	Information Or	Ny	T100
Producer Sup	oplier Code	Information Only Information Only	Information Or Information Or	nly nly	T100 T88
Producer Sup	oplier Code	Information Only	Information Or	nly nly nly	T100
	•	Information Only Information Only Information Only	Information Or Information Or Information Or	nly nly nly	T100 T88 T89
Producer Supplier	•	Information Only Information Only Information Only Information Only	Information Or Information Or Information Or Information Or	nly nly nly	T100 T88 T89
Producer Supplier Sample	Code:	Information Only Information Only Information Only Information Only on Only	Information Or Information Or Information Or Information Or	nly nly nly ty <b>hod:</b> [Information Only	T100 T88 T89 T99
Producer Supplier Sample	Code: Type: Informatio	Information Only Information Only Information Only Information Only on Only	Information Dr Information Dr Information Dr Information Dr Acceptance Metl 99 - Moisture-Density f	nly nly nly ty <b>hod:</b> [Information Only	T100 T88 T89 T99
Producer Supplier Sample Test M Sample Loc	Code: Type: Informati ethod: T99 ation: Placeme	Information Only Information Only Information Only Information Only Information Only on Only	Information Dr Information Dr Information Dr Information Dr Acceptance Metl 99 - Moisture-Density f	nly nly nly hod: Information Only Relations of Soils ate 1 Samples per.:	T100 T88 T89 T99
Producer Supplier Sample Test M Sample Loc Sample	Code: Type: Informati ethod: T99 sation: Placeme Units:	Information Only Information Only Information Only Information Only Information Only on Only T	Information Dr Information Dr Information Or Information Or Acceptance Mett 99 - Moisture-Density F R.	nly nly nly hod: Information Only Relations of Soils ate	T100 T88 T89 T99  Frequency
Producer Supplier Sample Test M Sample Loc Sample Sample Respons	Code: Type: Informati ethod: T99 sation: Placeme Units:	Information Only Information Only Information Only Information Only Information Only on Only T Information Only T	Information Dr Information Dr Information Or Information Or Acceptance Met 99 - Moisture-Density F R.	nly nly nly hod: Information Only Relations of Soils ate 1 Samples per.:	T100 T88 T89 T99  Frequency

iv. Repeat this process for additional materials linked to the item. Save.

Continue the previous steps for all items added by the change order.