

Commercial Change Order Owner Review Worksheet

1 PROJECT AND INITIATING RECORD

Use the agreement's terminology

PROJECT NAME AND ADDRESS	ORIGINAL CONTRACT / AGREEMENT	
CHANGE ID / LOG NUMBER	DATE IDENTIFIED / NOTICE DEADLINE	
INITIATING PARTY	RFI, FIELD REPORT, INSTRUCTION OR DRAWING REFERENCE	
CURRENT STATUS - CHECK ONE AND VERIFY AGAINST THE CONTRACT		
☐ Potential issue	☐ RFI / clarification	☐ Proposal requested
☐ Proposal submitted	☐ Directive issued	☐ Executed change order

2 DEFINE THE CHANGE

State what changes and what does not

REASON FOR CHANGE AND SOURCE DOCUMENT

ADDED WORK

DELETED WORK AND CREDITS

UNCHANGED / EXCLUDED SCOPE

DRAWINGS, SPECIFICATIONS AND EXHIBITS

3 PRICE REVIEW

Accept only contract-supported components

☐ Labor classifications, hours, rates and allowed burdens	☐ Material quantities, quotations, delivery and storage	
☐ Owned or rented equipment and supporting rate basis	☐ Subcontractor proposals and lower-tier support	
☐ Deleted-work credits and avoided-cost reconciliation	☐ Overhead, profit, bond, insurance and tax basis	
☐ Design, testing, permit or vendor cost responsibility	☐ Proposal validity, escalation and stated assumptions	
PROPOSED ADDITION	PROPOSED CREDIT	NET PROPOSED ADJUSTMENT

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TIME | AUTHORITY | RECONCILIATION

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4 SCHEDULE AND OPERATIONAL REVIEW

Separate duration from completion impact

- | | |
|--|--|
| ☐ Procurement lead time and required decision date | ☐ Access, shutdown, phasing or occupied-space constraints |
| ☐ Inspection, testing and authority requirements | ☐ Milestone or critical-path effect supported by schedule logic |
| ☐ Added work duration versus requested contract-time change | ☐ Mitigation options and their cost / risk implications |

SCHEDULE BASIS AND AFFECTED ACTIVITIES

REQUESTED DAYS AND MILESTONE EFFECT

5 AUTHORITY AND DECISION GATE

Do not confuse review with authorization

CONTRACT CLAUSE / CHANGE PROCEDURE

AUTHORIZED OWNER REPRESENTATIVE

REQUIRED DESIGN-PROFESSIONAL ACTION

- | | |
|--|---|
| ☐ Notice requirements and deadlines satisfied | ☐ Correct document and version used |
| ☐ Scope, cost and time are aligned | ☐ Assumptions and unresolved items are visible |
| ☐ Required reviewers have documented comments | ☐ Authorized signers are identified |
| ☐ Proceed-before-agreement rule checked | ☐ Legal / insurance review obtained if appropriate |

DECISION / STATUS

AUTHORIZED BY

AUTHORIZATION DATE

6 LOG, COMMUNICATE AND RECONCILE

Close the loop after authorization

- | | |
|--|---|
| ☐ Update change log and distribute the approved record | ☐ Update contract sum / GMP and committed costs |
| ☐ Update contract time, milestones and current schedule | ☐ Issue current drawings, specifications and field direction |
| ☐ Align invoice / pay-application coding and backup | ☐ Track pending items, credits and final reconciliation |

OPEN QUESTIONS, CONDITIONS OF APPROVAL AND NEXT ACTIONS

USE THIS WORKSHEET WITH THE GOVERNING PROJECT DOCUMENTS

This worksheet helps an owner organize review questions. It does not create entitlement, approve work, change a contract or replace legal advice.

Contract families distinguish agreed changes, interim directives, requests for information and minor design instructions. Names and authority vary.

Reference points: AIA G701; ConsensusDocs 202 / 203 / 204; Caltrans Construction Manual Section 5-3. Use only the documents adopted for your project.