EEBACS USER GUIDE 1.0
Appendix E: Amendments

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E.1 Amendments.

The Amendments Tab creates an amendment and supporting documentation. Acquisition user roles can add, edit, delete, and issue Amendments in EEBACS. Some Design user roles will be able to update estimates in the Acquisition module for contract amendment purposes.

There are two types of amendments:

1. **Administrative Amendments (Non Pay Item)** – Non pay item amendments will be inputted to the program to maintain amendment number order. This type of amendment may result because of changes in Davis – Bacon Wage rates, Special Contract Requirements (SCRs), plans, or a road user fee at the "Bid Summary Groupings" page.

2. **Pay Item Amendments** – Pay item amendments change the Bid Schedule or Summary of Quantities. They may include adding, deleting, or modifying a pay item or a component of a pay item such as quantity. Depending on your Division's practices, pay item amendments may be developed in whole or part by the Design or Acquisition Section.

E.1.1 Amendment List.

The Amendment List tab allows the user to create, issue, and undo an amendment. Generally, only Acquisition staff has the authority to create, issue, undo, and delete amendments; while Design staff has authority to edit a Pay Item amendment. Contact your Acquisition staff if you need assistance.

E.1.1.1 Add New Amendment.

A. Select the "Add New Amendment" icon;
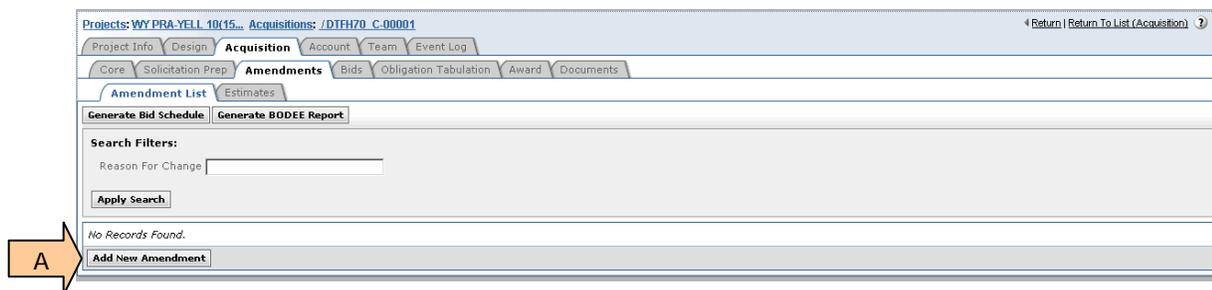
As amendments are added, a list is developed. Note that only the most recent amendment (that has not been issued) can be edited.

B. Enter Amendment Number (make sure the number reflects your Division's nomenclature);

C. Enter date of the amendment;

D. Select the Yes or No radio button depending on the type of amendment. Examples of a non pay item amendment type would be changes due to Davis – Bacon Wage Rate updates, specification changes, or plan changes that did not effect quantity;

E. Insert a description of what changes can be found in the amendment; and

F. Select the "Save" icon for pay item type of amendments in order to modify the estimate or "Save & Close" icon to exit the screen.

E.1.1.2 Issuing an Amendment.

If a pay item amendment is required, the user must complete an estimate (see Chapter 3.7.3 Estimates). Make sure the "complete" button is toggled "Yes".

Once data has been input for either the pay item or non-pay item amendment:

A. Select the "Amendment Issued" button.

Pay Item Amendment example

Non- Pay Item Amendment example:

Once the amendment has been issued, the "Issued" column will be checked under the "Amendment List" tab

E.1.1.3 Undo Amendment Issued.

"Undo amendment issued" can only be performed by Acquisition staff. Undoing an amendment allows the amendment to be edited or deleted.

A Select the "Undo Amendment Issued" button.

Example of a non-pay item amendment:

Example of a pay item amendment:
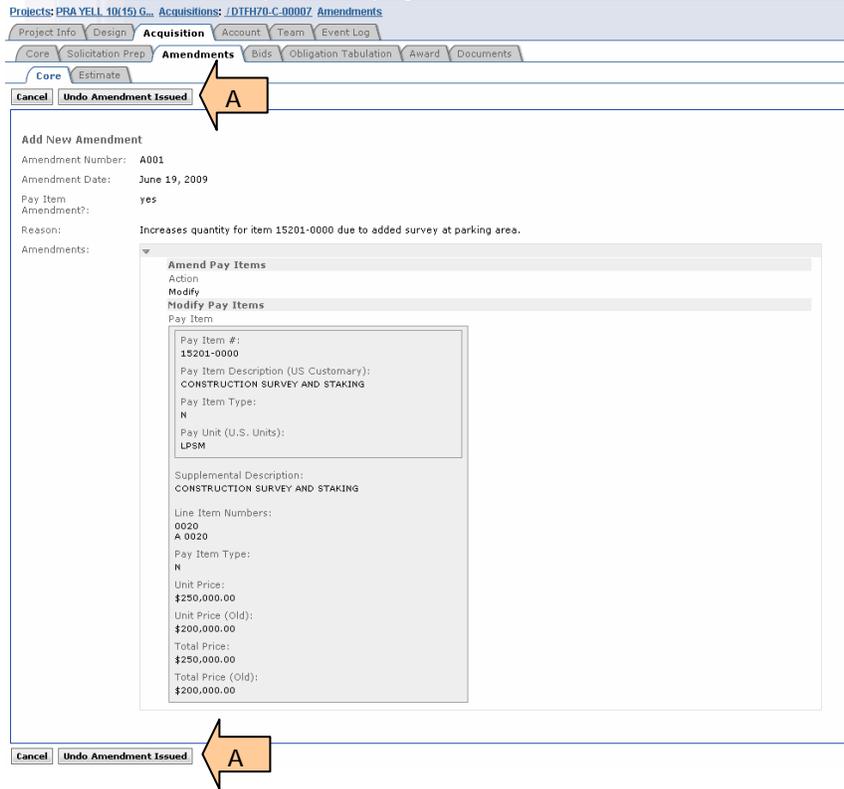
E.1.1.4 Deleting an Amendment.

An amendment may be deleted through the "Amendment" tab. Amendments deleted cannot be retrieved (including estimates developed under the amendment).
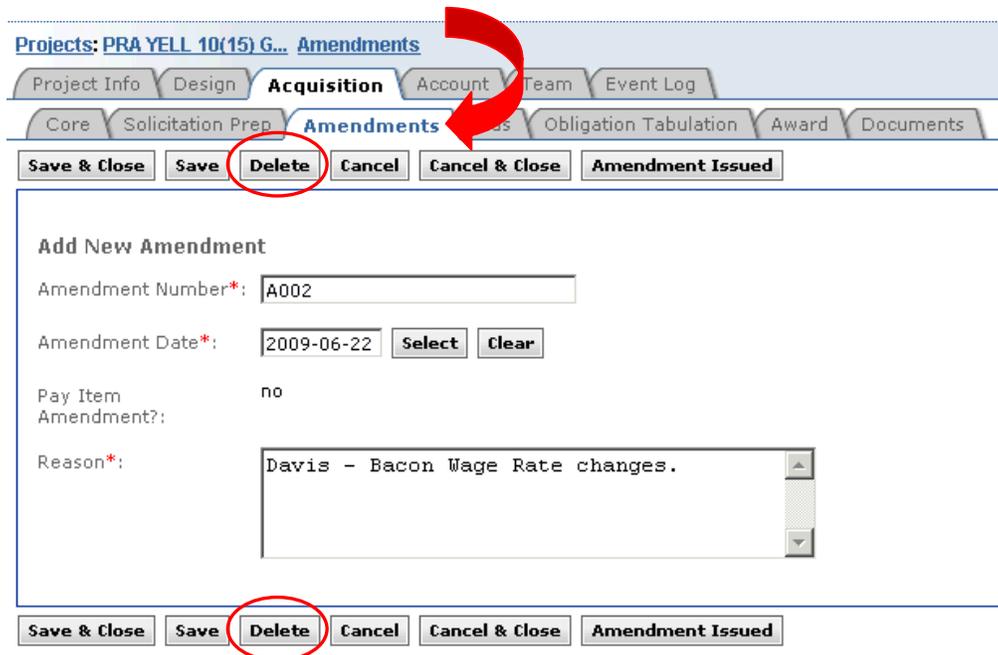
E.1.2 Estimates (for Amendments).

The "Estimates" tab appears only when the Pay Item Amendment is toggled "Yes". The Acquisition "Estimate" tab is very similar to the Design module "Estimate" tab. The tab opens sub tabs to allow access to the Schedules, Column Headers, Pay Items (including the Master Pay Item Table), and Construction Estimate (including report generation for the Bid Schedule and Summary of Quantities).

Note: Since an Amendment estimate tracks the changes with strikeout and Amendment numbers; if an error is made, accepted, or saved when modifying an estimate the Amendment will most like need to be deleted and re-inputted (there is no undo command).

A. Text in the "Description" field is forwarded from previous estimate. Delete the text and substitute with appropriate text explaining the estimate change;

B. In order to edit the estimate to make changes select the "No" radio button. To issued an amendment with an estimate the radio button must be toggled "Yes"; and

C. Select "Save" icon to continue.

A full description of how to make changes to an estimate can be found in the Design Module Section.

For an explanation of common amendment changes continue to read the following:

The "Schedules" tab allows the user to modify schedule information (Schedule type, description, termini, CPM days, lane miles, etc.). The "Column Headers" tab allows the user to manipulate the column heading for the Summary of Quantity report. Generally if it is a simple pay item manipulation a user does not have to access these tabs.

Most commonly used tabs will be the "Pay Items" and "Construction Estimates" tabs.

E.1.2.1 Project Pay Items.

The "Project Pay Items" tab allows the user to modify, add, or delete pay items in a schedule.

When a project has multiple schedules it is some times easier to use the "search filter" to view only the pay items in the schedule to be modified. This can be done by selecting the desired schedule in the "Search Filters" box and selecting "Apply Search".

If a pay item is shared between multiple schedules and the pay item is to be modified in only one schedule, remember to remove the link. See the Design module for further information.

Note: DO NOT add a "unit price" to pay item 15101-0000 Mobilization. This is a calculated value that is computed when updating the Construction Estimate.

A. Select the edit icon to access the pay item.

E.1.2.2 Pay Items.

The "Pay Item" tab allows the user to add, delete or modify a pay item. The following are some of the most common pay item actions when developing an amendment.

To revise a quantity:

B. Input the revised quantity (45,000 cu yds). Some pay items may require quantity splits to multiple accounts;

C. Include any pertinent remarks as to why the change was required; and

D. Select "Save" or "Save and Close".

To delete a pay item:

Select the pay item from the pay item table and select the "Delete" icon. A challenge statement will ask the user to confirm the action.
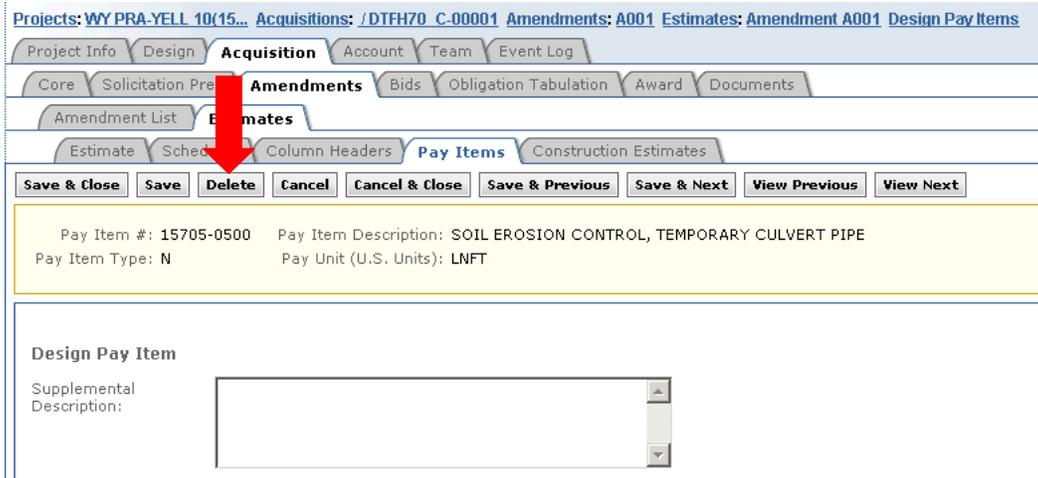
Note that in the pay item table, deleted pay items are struck out.

To add a new pay item to the schedule, go to the "Master Pay Item" tab.

E. Find the desired pay item and select the "add" icon.
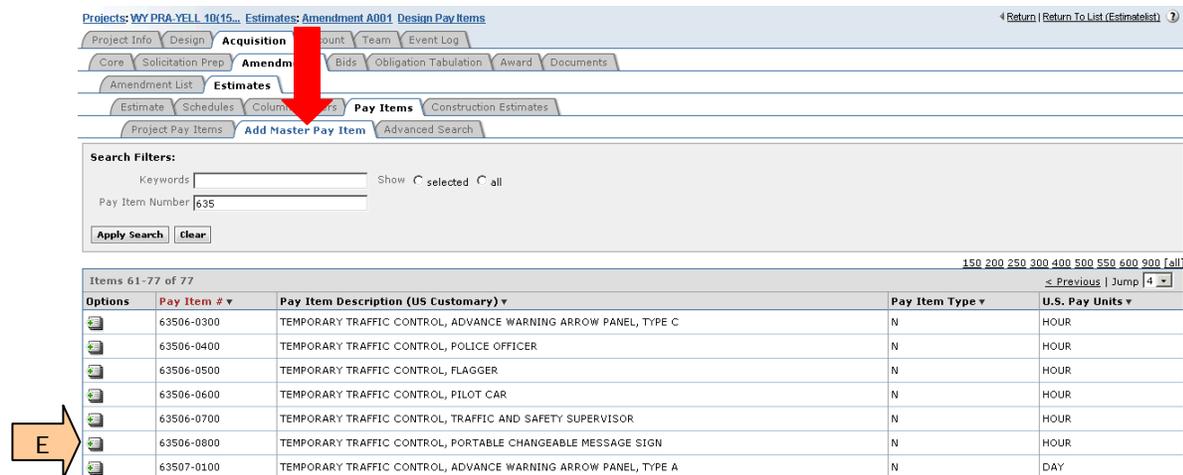
F. Before editing the added pay item, select the "Project Pay Item" to determine the line item number (this added item is between A0200 and A0210).

G. Select the "edit" icon to access the pay item.

H. Select the schedule in which the pay item will be added;

I. Input the four digit line item number

J. Modify the "Pay Item Type", determine if the item is to be a "Contract Quantity", and change the bid decimal if necessary;

K. Select the "Column Heading" from the pick-list;

L. Input the quantity and account (the quantity may have to be split if more than one account number is present);

M. Input the "Unit Price". This may be achieved by using either the BHUP method, CBUP method, or simply inputting and a value;

N. Input a reason for adding the pay item;

O. Select the appropriate icon to exit the screen.

E.1.2.3 Construction Estimates.

The "Construction Estimates" tab allows the user to modify the unit price for mobilization by either percentage or a user selected value. It also allows the user to round the estimated total of the bid items (which effects the mobilization price) and provides a summary of all incentive and contract quantity items. The construction estimate must be updated (or saved) each time a modification is made to a pay item and a new bid item total is required.

   A. Select "Edit" icon to update the estimate for a particular schedule.

   B. If necessary, adjust the mobilization price;

   C. Select "Save" or "Save and Close" to update the estimate; and

   D. Print the appropriate reports.
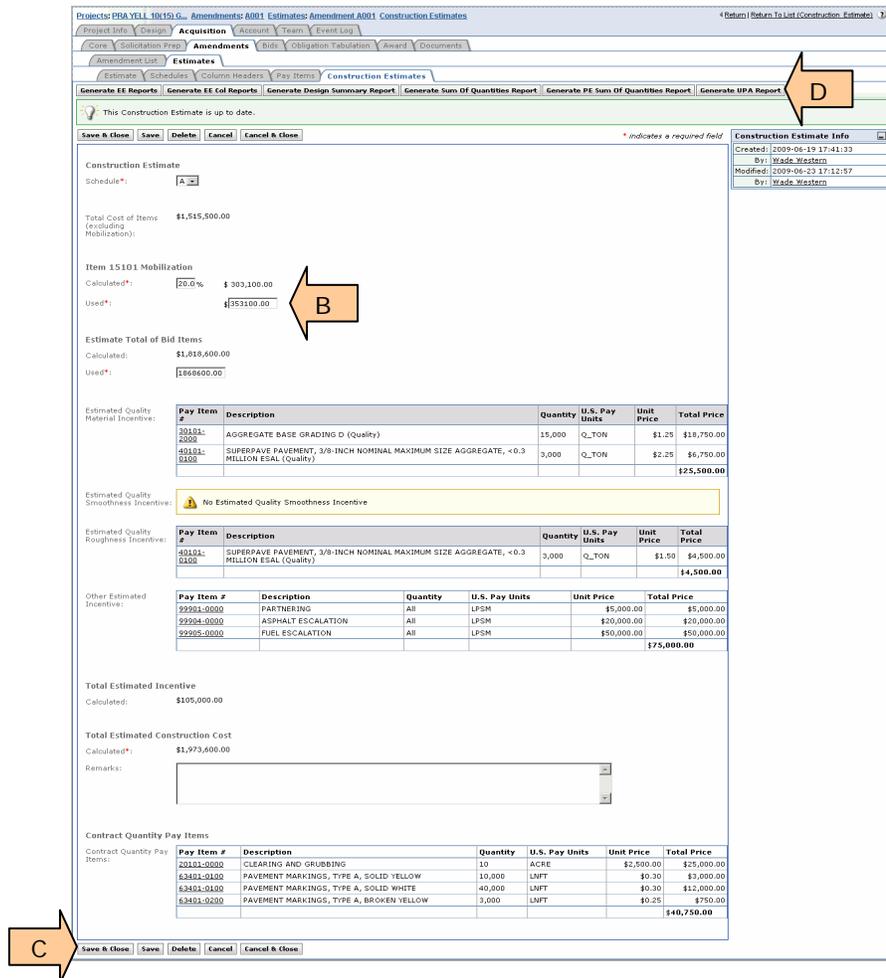
E.1.2.4 Reports.

Acquisition users may regenerate the Bid Schedule and BODEE reports by selecting the "Core" tab.

The Bid Schedule may be regenerated in either Adobe Acrobat (PDF) or Microsoft Excel format. The BODEE may be regenerated only in Adobe Acrobat (PDF) format.

Example of Bid Schedule Report.

The Bid Schedule Report should reflect changes made in the amendment. Below are examples of:

  A. A Deleted pay item;

  B. A change in quantity for a pay item; and

  C. An added pay item.

Amendment	Item No.	Pay Item No.	Description	Quantity	Unit	Unit Price	Amount
	A0010	15101-0000	MOBILIZATION				
				ALL	LPSM	$___LPSM____	$_____
	A0020	15201-0000	CONSTRUCTION SURVEY AND STAKING				
				ALL	LPSM	$___LPSM____	$_____
	A0030	15301-0010	CONTRACTOR QUALITY CONTROL AND ASSURANCE				
				ALL	LPSM	$___LPSM____	$_____
	A0040	15401-0000	CONTRACTOR TESTING				
				ALL	LPSM	$___LPSM____	$_____
	A0050	15501-0000	CONSTRUCTION SCHEDULE				
				ALL	LPSM	$___LPSM____	$_____
	A0060	15705-0100	SOIL EROSION CONTROL, SILT FENCE				
				3000	LNFT	$_____	$_____
A001	~~A0070~~	~~15705-0500~~	~~SOIL EROSION CONTROL, TEMPORARY CULVERT PIPE~~				
				~~500~~	~~LNFT~~	~~$_____~~	~~$_____~~
	A0080	20101-0000	CLEARING AND GRUBBING				
				10	ACRE	$_____	$_____
	A0090	20220-1000	REMOVAL, INDIVIDUAL TREE				
				20	EACH	$_____	$_____
A001	A0100	20401-0000	ROADWAY EXCAVATION				
				45000	CUYD	$_____	$_____
	A0110	30101-2000	AGGREGATE BASE GRADING D				
				20000	TON	$_____	$_____
	A0130	40101-0100	SUPERPAVE PAVEMENT, 3/8-INCH NOMINAL MAXIMUM SIZE AGGREGATE, <0.3 MILLION ESAL				
				10000	TON	$_____	$_____

A ⟶ (points to A0070 deleted row)

B ⟶ (points to A0100 row)

Amendment	Item No.	Pay Item No.	Description	Quantity	Unit	Unit Price	Amount
A001	A0205	63506-0800	TEMPORARY TRAFFIC CONTROL, PORTABLE CHANGEABLE MESSAGE SIGN				
				10000	HOUR	$_____	$_____

C ⟶ (points to A0205 row)