



Change Orders Workflow Processes

DocuSign Enabled Record

- ▶ The Change Order record workflows now utilize DocuSign, which enables electronic signature of change orders. These include:
 - ▶ GMP Amendment
 - ▶ Proposal Request
 - ▶ Request for Change Order
 - ▶ Change Directive
- ▶ Users who are sent a Change Order for signature via DocuSign do not need a separate account to sign the document.
- ▶ For more information about how to use DocuSign, please refer to the DocuSign Job Aid available on the OFCC Website

Change Order – GMP Amendment

*DocuSign Enabled

Step 1

Amendment Creation

- Created by CMR/DB
- Pre Con lines should be added
- Subcontractor /Supplier Declaration for EDGE must be approved
- **Submit to: A/E Review**

Step 2

Associate (A/E) Review- *Skip if DB*

- A/E Review Record
- **Submit to: PM Review**

Step 3

PM Review

PM Review Record

Submit to: PC Validation

Step 4

PC Validation and DocuSign

PC prepares Change Order in DocuSign

Submit for signature via DocuSign

Step 5

Signature via DocuSign

Contractor, Owner, Contracting Authority review and sign via DocuSign

Submit to: Contractor via DocuSign

Step 6

Project Coordinator

- Finish record in OAKS CI
- Attach DocuSign Documents
- **Submit to: END**

Change Order – Proposal Request

*DocuSign Enabled

Step 1

Proposal Creation

- Associate (A/E) create proposal request, attaches supporting documents
- **Submit to: Contractor**

Step 2

Contractor

- Create proposal
- Plug in cost information in lower form.
- Reference lines ONLY when deducting money from the SOV
- Attach documents as necessary
- **Submit to: A/E Review**

Step 3

Associate (A/E) Review

- Review cost proposal enter change order number create discussion group if necessary
- Submit to: PM Review**

Step 4

PM Review

- Project Manager review record
- Submit to: Project Coordinator**

Step 5

Project Coordinator

- Enter current contract completion date
 - Send to Contractor via DocuSign
- Submit to: Contractor via DocuSign**

Change Order – Proposal Request

*DocuSign Enabled

• Step 6

- Contractor
- Review and Sign via DocuSign
- Sent to: **Owner Approval via DocuSign**

Step 7

- Owner/Owner Financial
- Review and Sign via DocuSign
- Sent to: **OFCC Review via DocuSign**

Step 8

- OFCC Review
- Appropriate OFCC Staff reviews and signs via DocuSign
- Sent to: **Project Coordinator via DocuSign**

Step 9

- Project Coordinator
- Finish record in OAKS CI
- Attach DocuSign Documents
- Submit to: **END**

Change Order – Request for Change Order

*DocuSign Enabled

Step 1

Creation

- Contractor creates request for change order , attaches supporting documents
- Submit to: **A/E**

Step 2

A/E Review

Review cost proposal enter change order number

Submit to: **PM Review**

Step 3

PM Review

Project Manager review record

Submit to:
Project Coordinator

Step 4

Project Coordinator

- Enter current contract completion date

- Send to Contractor via DocuSign

Submit to: **Contractor via DocuSign**

Change Order – Request for Change Order

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Step 5

- Contractor
- Review and Sign via DocuSign
- Sent to: **Owner Approval via DocuSign**

Step 6

- Owner/Owner Financial
- Review and Sign via DocuSign
- Sent to: **OFCC Review via DocuSign**

Step 7

- OFCC Review
- Appropriate OFCC Staff reviews and signs via DocuSign
- Sent to: **Project Coordinator via DocuSign**

Step 8

- Project Coordinator
- Finish record in OAKS CI
- Add DocuSign Documents
- Submit to: **END**

Change Order – Change Directive

*DocuSign Enabled

Step 1

Creation

- A/E creates change directive and sends to PM for approval
- **Submit to: PM Approval**

Step 2

PM Approval

Project Manager review and approve record

Submit to: AE for Issuance

Step 3

AE Issuance

AE issues change directive to contractor for proposal creation

Submit to: Contractor

Step 4

Contractor proposal creation

Contractor creates request for change order, attaches supporting documents

Submit to: A/E Review

Change Order – Change Directive

*DocuSign Enabled

Step 5

A/E Review

- Review cost proposal
- Enter change order number
- Submit to: **PM Review**

Step 6

PM Review

Project Manager review record

Submit to: **Project Coordinator**

Step 7

Project Coordinator

- Enter current contract completion date
- Send to Contractor via DocuSign

Submit to: **Contractor via DocuSign**

Critical Notes about Change Orders

Important Note

There are two critical issues we would like to remind everyone of during the creation of a deduct Change Order:

Any Change Order which contains lines that will deduct money from your contractor's contract WILL lock the Contract SOV, this means, they will not have the ability to create an Application for Payment until the modification has been Approved or Withdrawn. We have found that best practice is to submit the monthly pay request prior to creating the change order with the deduct lines.

Another issue that seems to slow down the approval of the deduct change order occurs when lines from the SOV are not referenced. When creating the change order, the contractor must ensure that they are referencing the line they wish to deduct from. **EVERYONE reviewing** the change order must review the lower form and ensure that all **deduct lines** reference a line from the SOV.

For walk thru instructions on how to create a change order please go to the OFCC Website under Resources and Training.

Reference a Line when Deducting

When creating a change order with a deduct lines you must ALWAYS reference the line from the SOV:

Line Item - Google Chrome
https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/cost/itemopen?a=for

Change Order Line Item:

General

Reference:

WBS Code:

Code Name:

Short Description:

Amount (\$):

EDGE Certified Prime Contractor?:

Subcontractor/Supplier:

Subcontractor/Supplier:

EDGE Certified Sub?:

Notes:

Attachments (0) [Linked Records \(0\)](#)

Click Select next to the Reference Line

Note: When deducting money, you must reference a line

Line Item - Google Chrome
https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/cost/itemopen?a=for

Change Order Line Item:

General

Reference:

WBS Code:

Code Name:

Short Description:

Amount (\$):

EDGE Certified Prime Contractor?:

Subcontractor/Supplier:

Subcontractor/Supplier:

EDGE Certified Sub?:

Notes:

Attachments (0) [Linked Records \(0\)](#)

Reviewing the Line Items

When reviewing a change order which contains deduct lines, you must look for the referenced SOV line, it should NEVER be zero:

Contract Modification - PR#03-Visual Display Boards - Project No. SFC-130315.32 - Windows Internet Explorer

File Edit View Actions Help

Save Spelling... Add Attachment SOV Close Window

Contract Modification

General

General

Project Number: SFC-130315.32 Record Number: CM-0009

Project Name: Prairie Lincoln - New Elementary Creator: Haley Kurmas

Organization Name: South-Western CSD Creation Date: 06/02/2015 08:23 AM Local (GMT-5)

Facility Name: Prairie Lincoln - New Elementary Status: Approved

Title: PR#03-Visual Display Boards

Task Details

Record has been closed. (Click here to view process details)

Line Item List

Current View: All Show Currency in: Transaction Currency

1 Item(s) Page 1 of 1 Display 100 items per page

No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor/Sup
001	194	CE-C10-10M	CE Interior Const Specialty	Visual Display Surfaces - Material	-417.00	0	

Grid Find Total Amount: \$ -417.00

Attachments (2) Linked Records (0) General Comments Linked Mail (0)

Questions?

Please contact OAKS CI Support Desk:

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