



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. However, it is recommended. You can sign up for a free DocuSign account at docusign.net
- ▶ 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

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• 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

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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

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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

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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

Issuing a deduct change order will lock the SOV and no other change orders can be created. To avoid this, you can use the **Expedited Deduct Change Order** workflow.

This workflow is activated on a project by project basis. To request, the project manager needs to send an email to the OAKS CI Support Desk: oaksci@ofcc.ohio.gov with the following information:

- The name of one contractor user that will be executing the deduct change order
- The name of the project coordinator on the project

Adding Lines to Deduct CO

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.

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:

The screenshot displays a web application window titled "Contract Modification - PR#03-Visual Display Boards - Project No. SFC-130315.32 - Windows Internet Explorer". The interface includes a menu bar (File, Edit, View, Actions, Help) and a toolbar with options like Save, Spelling, Add Attachment, SOV, and Close Window. The main content area is divided into sections: "General", "Task Details", and "Line Item List".

The "General" section contains the following information:

- 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

The "Task Details" section shows a message: "Record has been closed. (Click here to view process details)".

The "Line Item List" section shows a table with the following data:

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	

A red box highlights the "Reference" field with the value "194" in the first row of the table, with a red arrow pointing to it from a box labeled "Correct".

At the bottom of the window, there are buttons for "Grid" and "Find", and a "Total Amount: \$ -417.00" field. The footer includes links for "Attachments (2)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211