OAKS
Capital Improvements

Cost Proposal Creation

Agency/Higher-Ed

OFCC
OHIO FACILITIES CONSTRUCTION COMMISSION

DocuSign Enabled Record

- The Contract Modification Record workflows now utilize DocuSign, which enables electronic signature of change orders.
  - GMP Amendment
  - **Proposal Request**
  - Request for Change Order
  - Change Directive

- Users who are sent a Contract Modification 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.

*Note on Deduct Change Orders

- If you are taking money away (deducting) from the contract, this proposal will **LOCK** the Contract Schedule of Values (SOV) and no Applications for Payment can be created until this Change Order is Approved or Withdrawn
  - **A new workflow- The Expedited Deduct Change Order can be activated for your project and can help you avoid locking the SOV. Please contact your OFCC project manager to enable this.**

- Also, if you have an Application for Payment in your drafts it can be corrupted when a deduct Change Order is created.
  - The fix for this is to create your Application for Payment and send it forward to the A/E, then have the A/E return it to you for clarification. This changes the status of your Application for Payment record and keeps the Change Order from corrupting it.

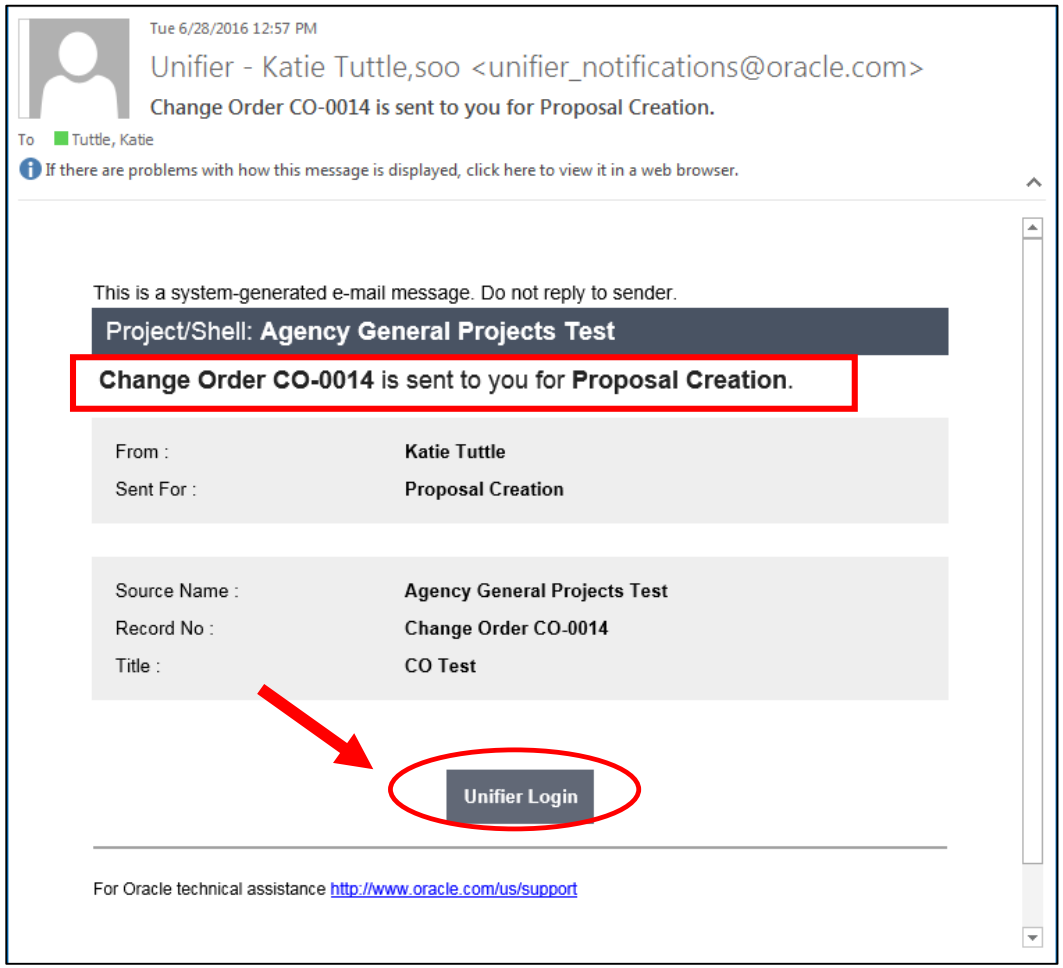
Purpose and Process

- Used when the revision to the Contract Schedule of Values will not adversely impact the construction schedule or the finished product if not implemented.
- The A/E initiates the proposal request and the Contractor provides pricing and time impact.
- Proposal Requests are initiated in OAKS CI as Contract Modifications.
- **Workflow:**

  Created by: A/E → Sent to: Contractor Proposal Creation → Sent to: A/E Review → Sent to: Proposal Update (if necessary) → Sent to: PM Review → Sent to: Project Coordinator for Change Order Validation → Sent to: Vendor signature via DocuSign

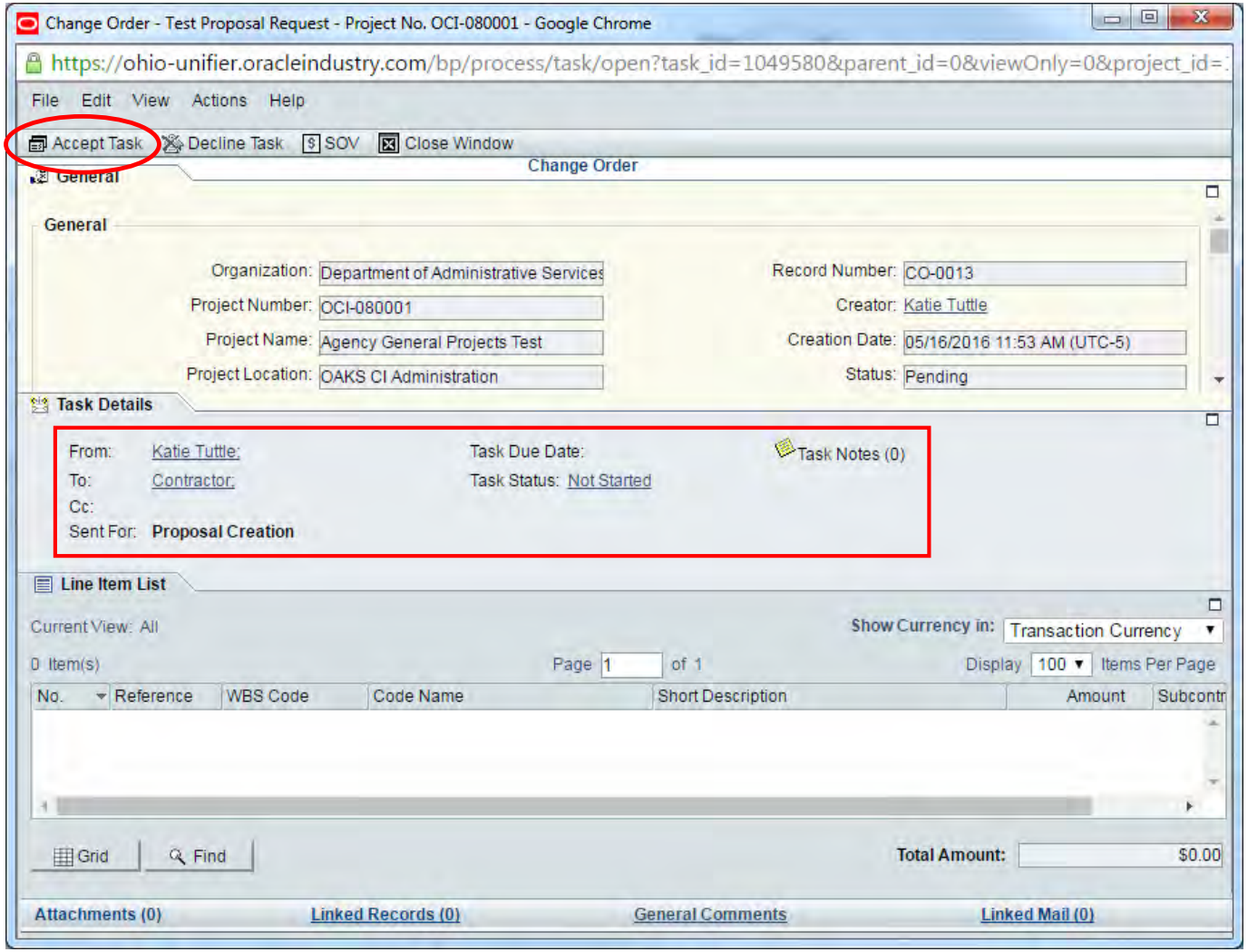
Create Cost Proposal

- The Contractor will receive an email notification from OAKS CI that they have a Contract Modification Task for Proposal Creation
- Click the Link to access your Task



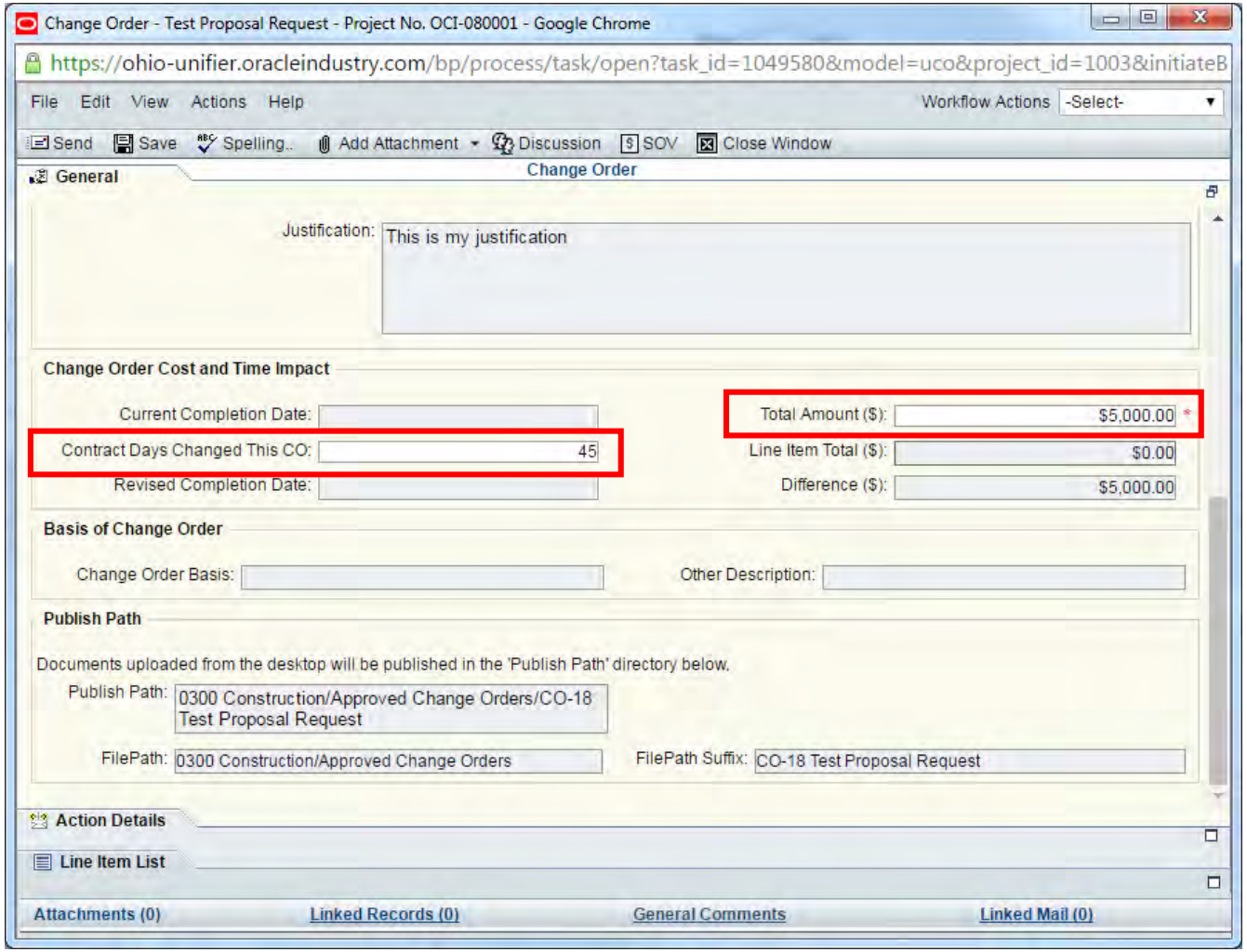
Cost Proposal

- Note information in Task Details
- Click Accept Task to begin work on the record



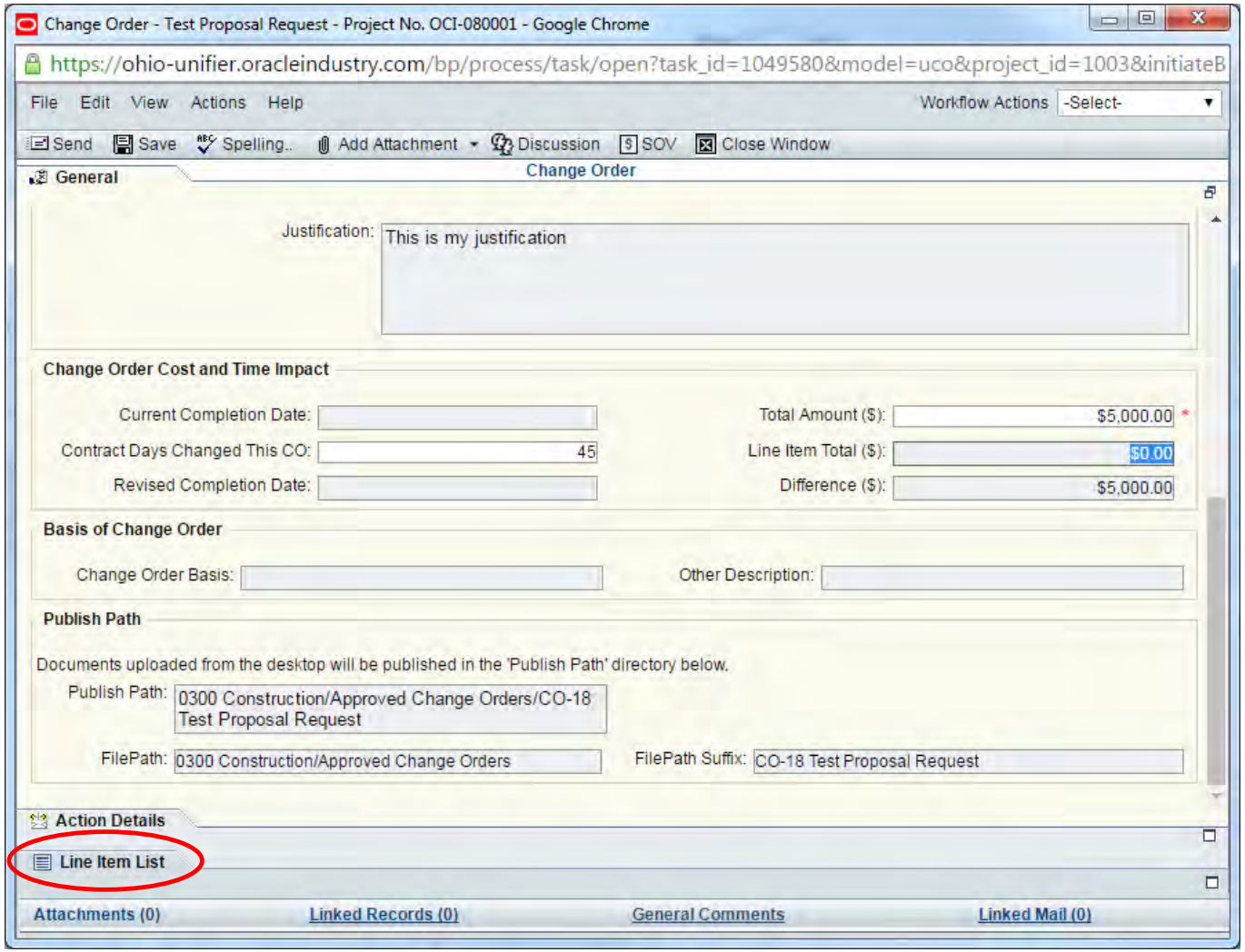
Cost and Time Impact

- Click the General Tab to expand
- Scroll down to the Change Order Cost and Time Impact section
- Enter Contract Days Changed and/or Total Dollar Amount



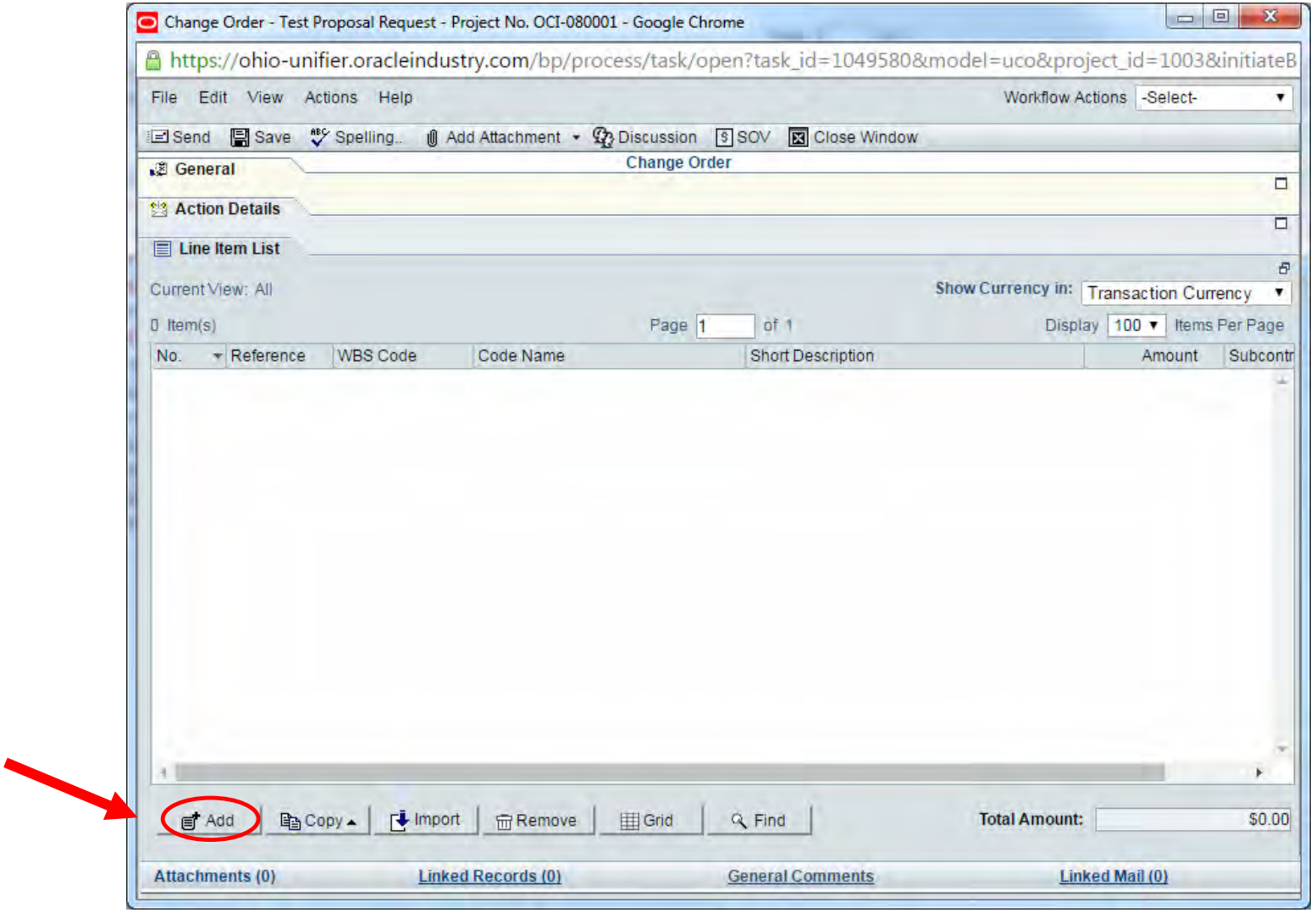
Add Line Items

- Enter the Cost Proposal Amounts by adding line items to the record
- Click Line Item List tab



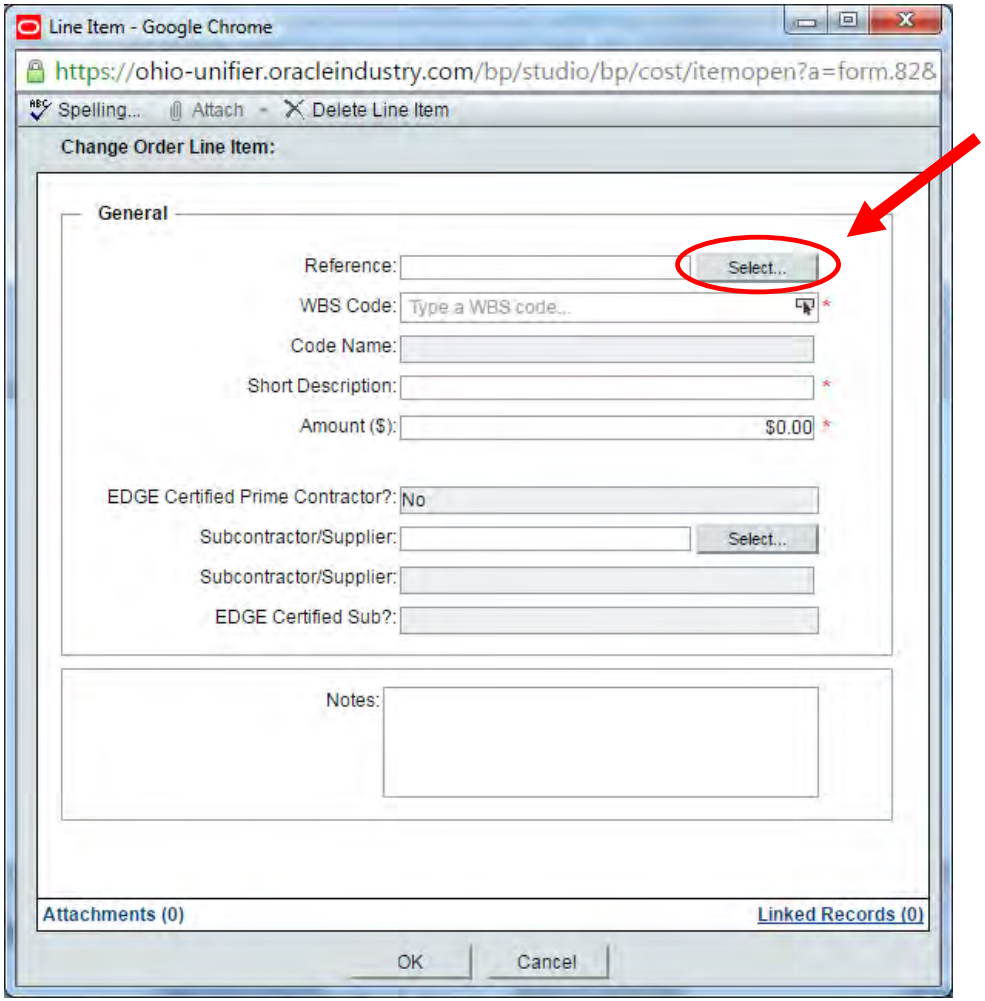
Add Line Items

- Click Add



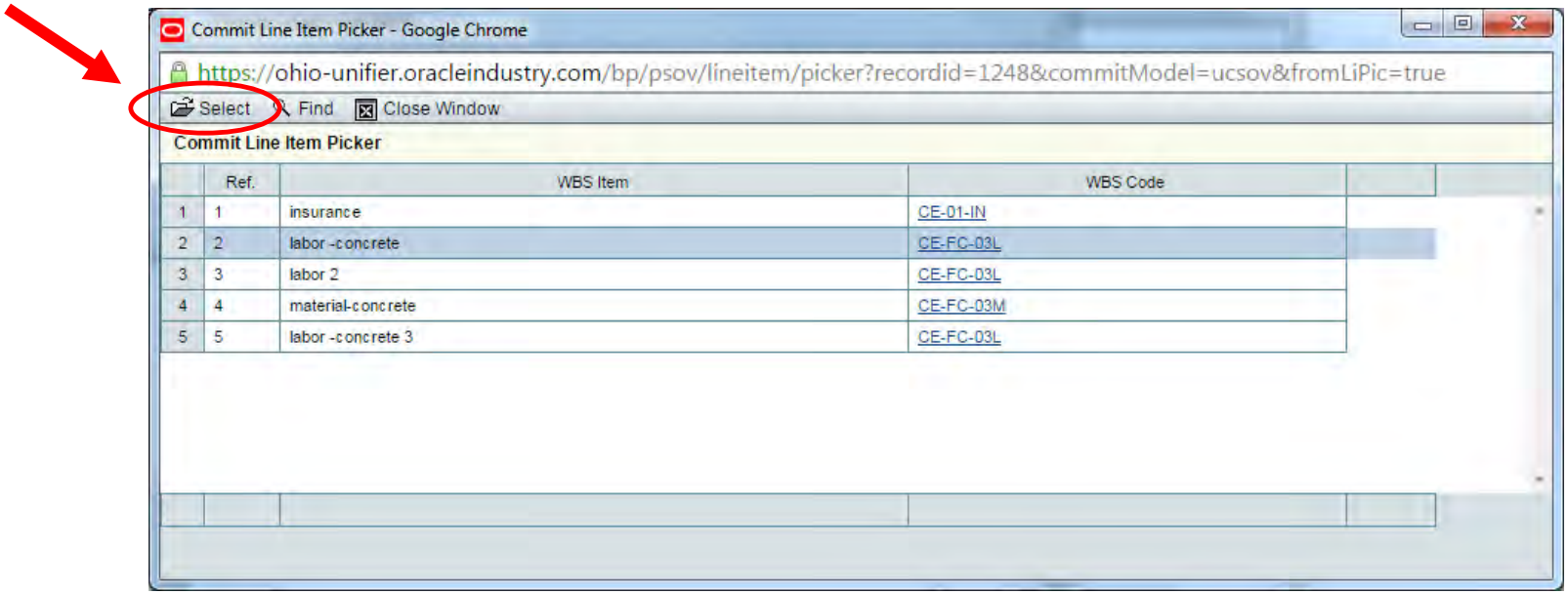
Change a Current Line on the SOV

- To change a current line on the Contract Schedule of Values (SOV), click the Select button next to Reference



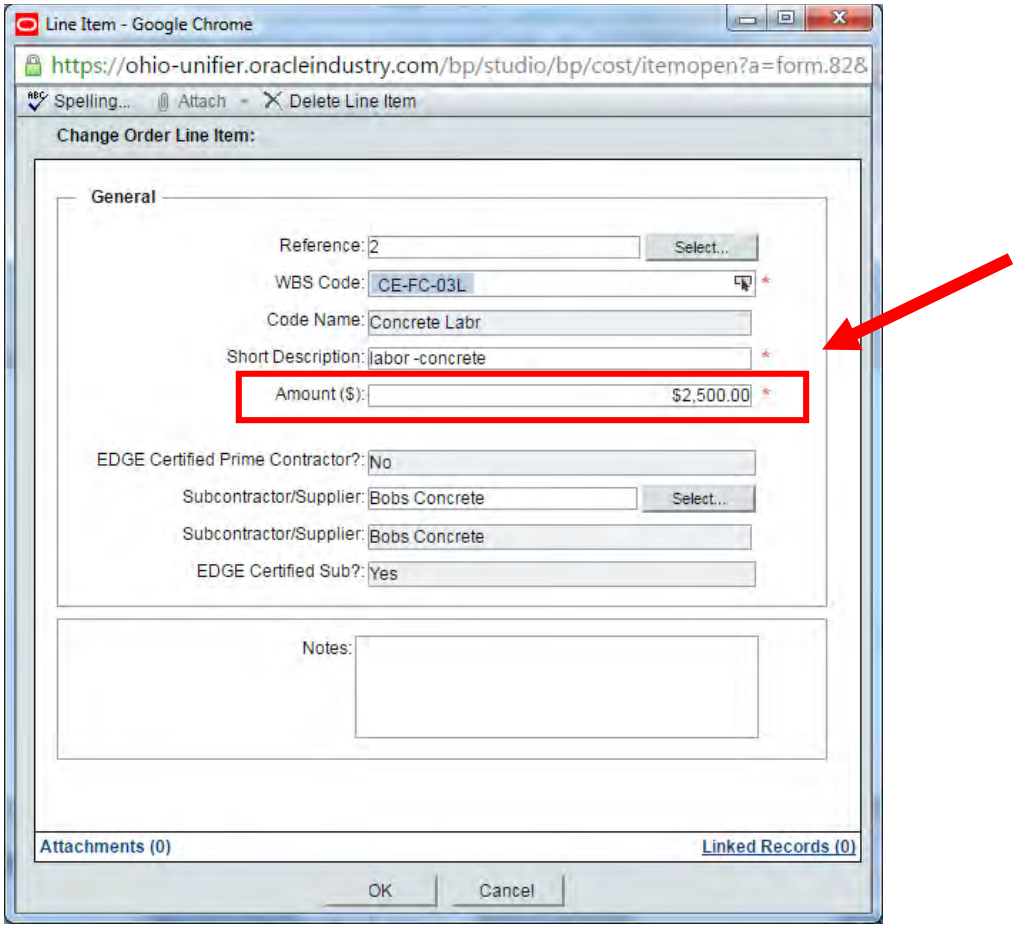
Change a Current Line on the SOV

- Highlight the SOV line you wish to modify
- Click Select



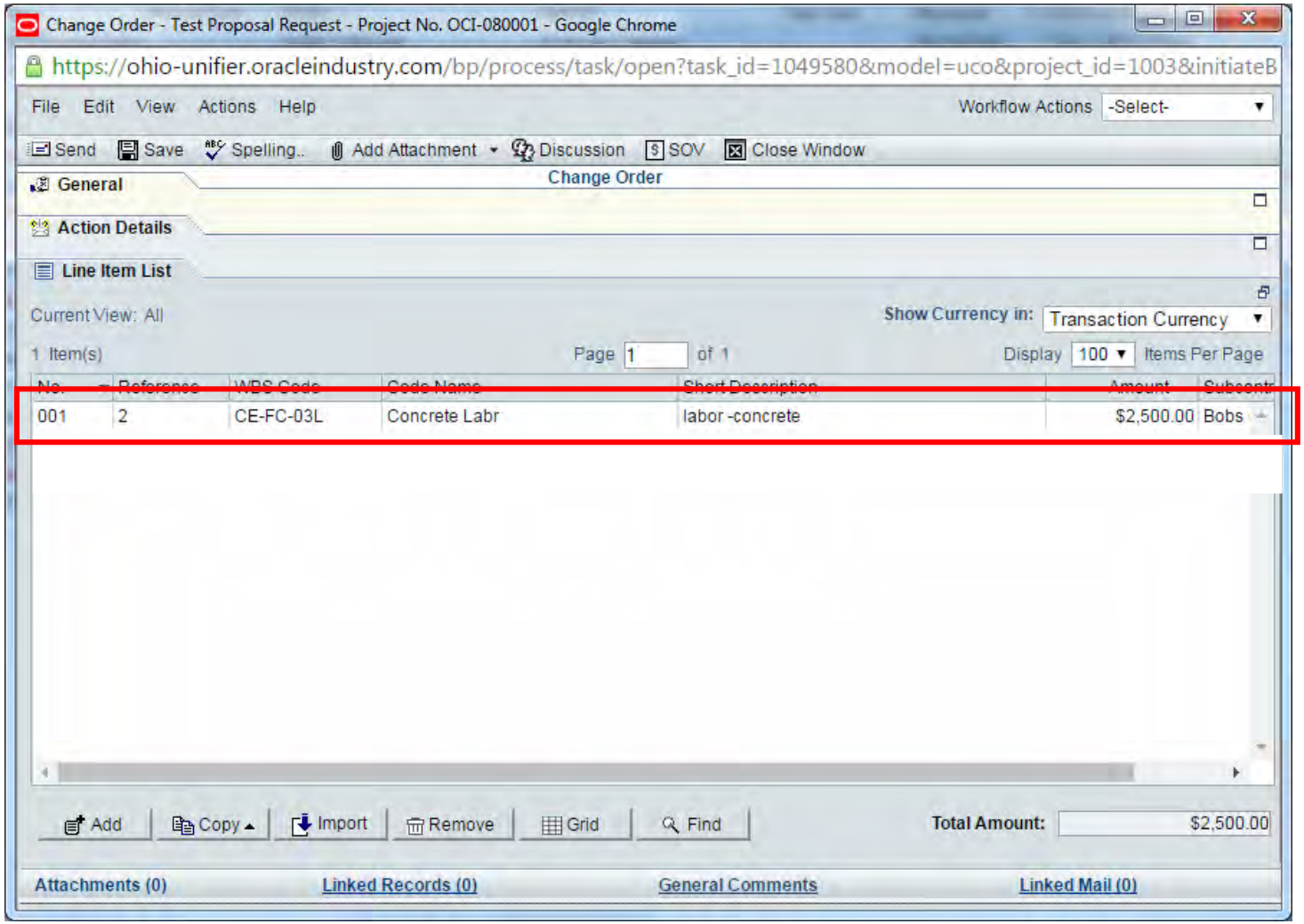
Change a Current Line on the SOV

- Information is populated into the form
- Enter the Amount of the change order
- Enter any other necessary information
- Click OK



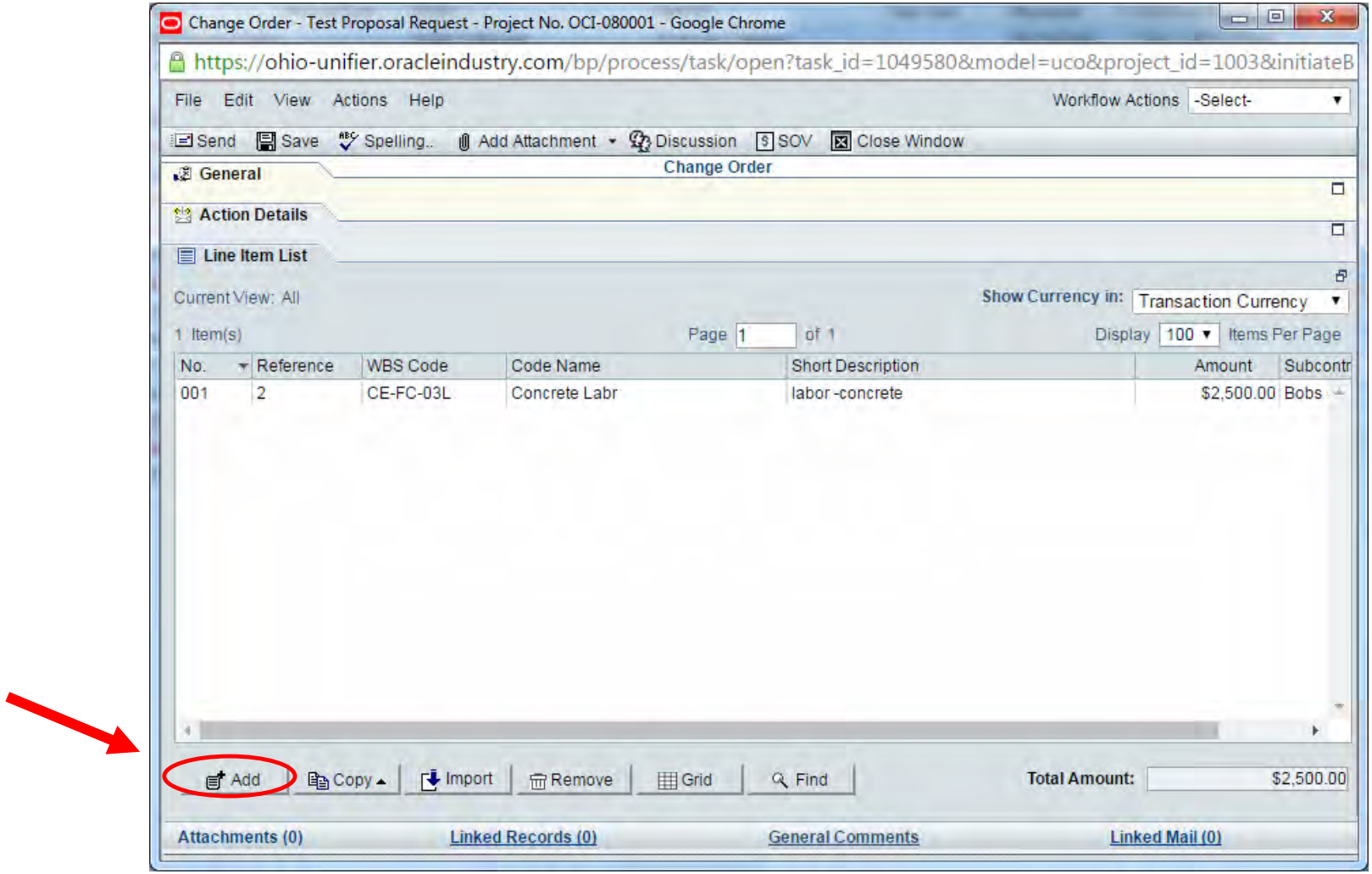
Change a Current Line on the SOV

- Line will populate into the lower form of the record



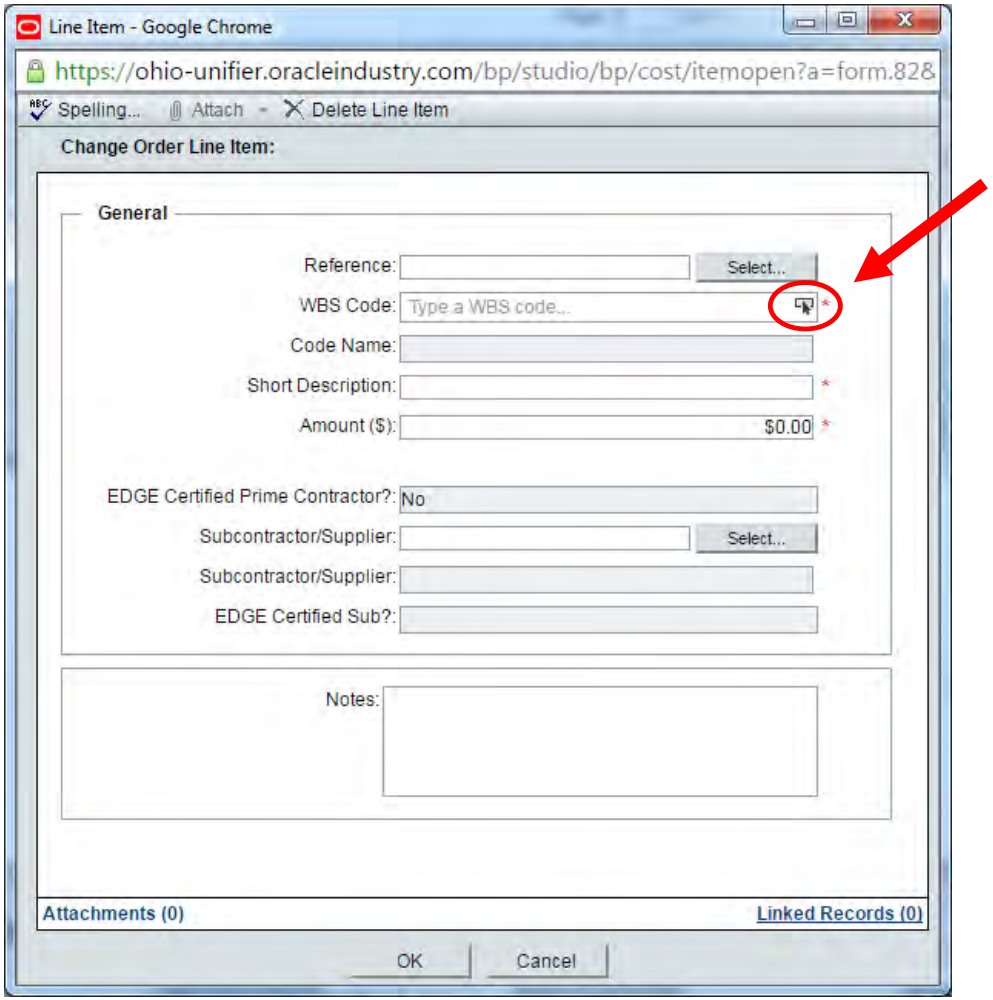
Add other Line Items

- Click Add



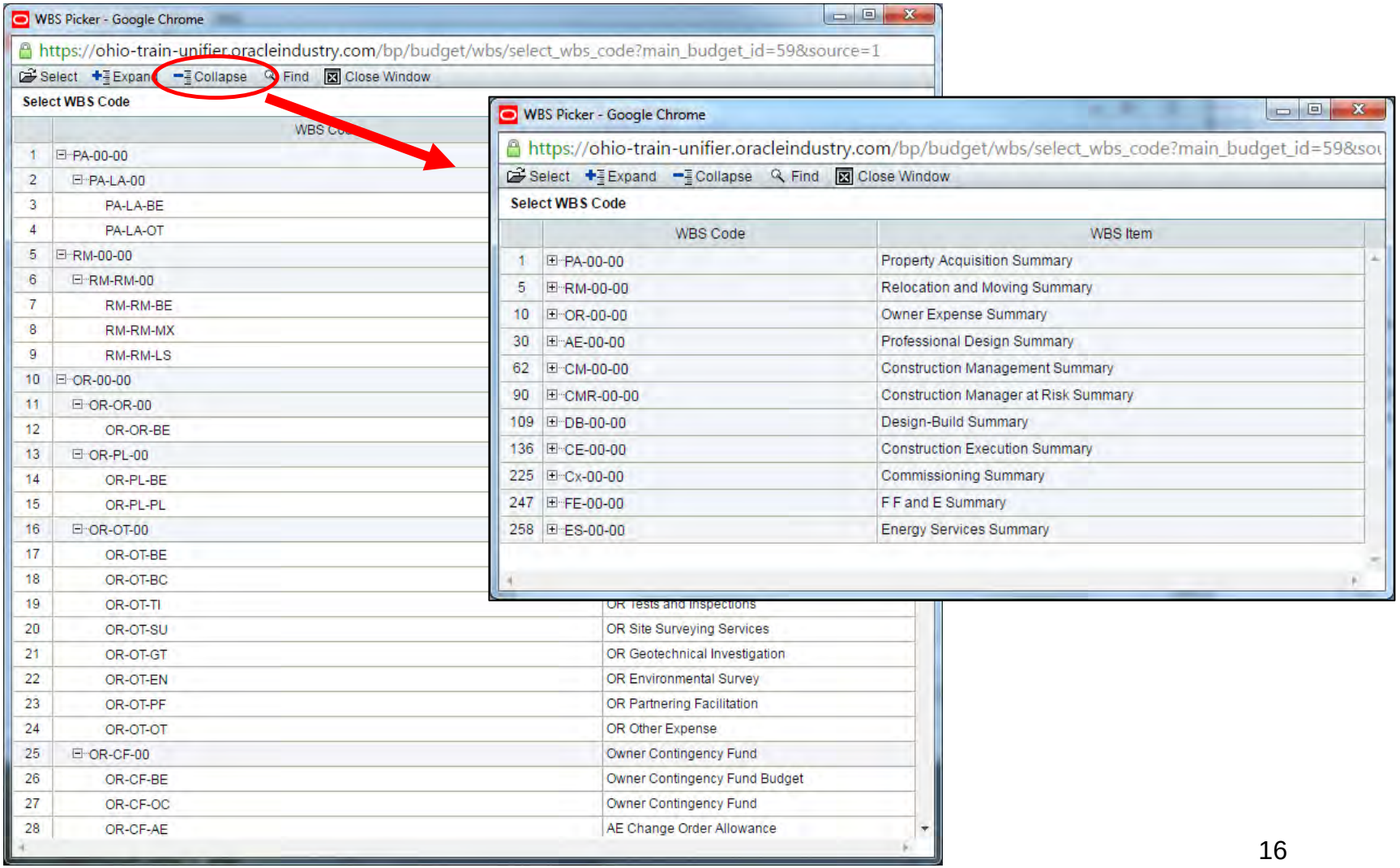
Add a New Line to the SOV

- To Add a New Line to the Contract Schedule of Values (SOV), click the arrow next to WBS Code



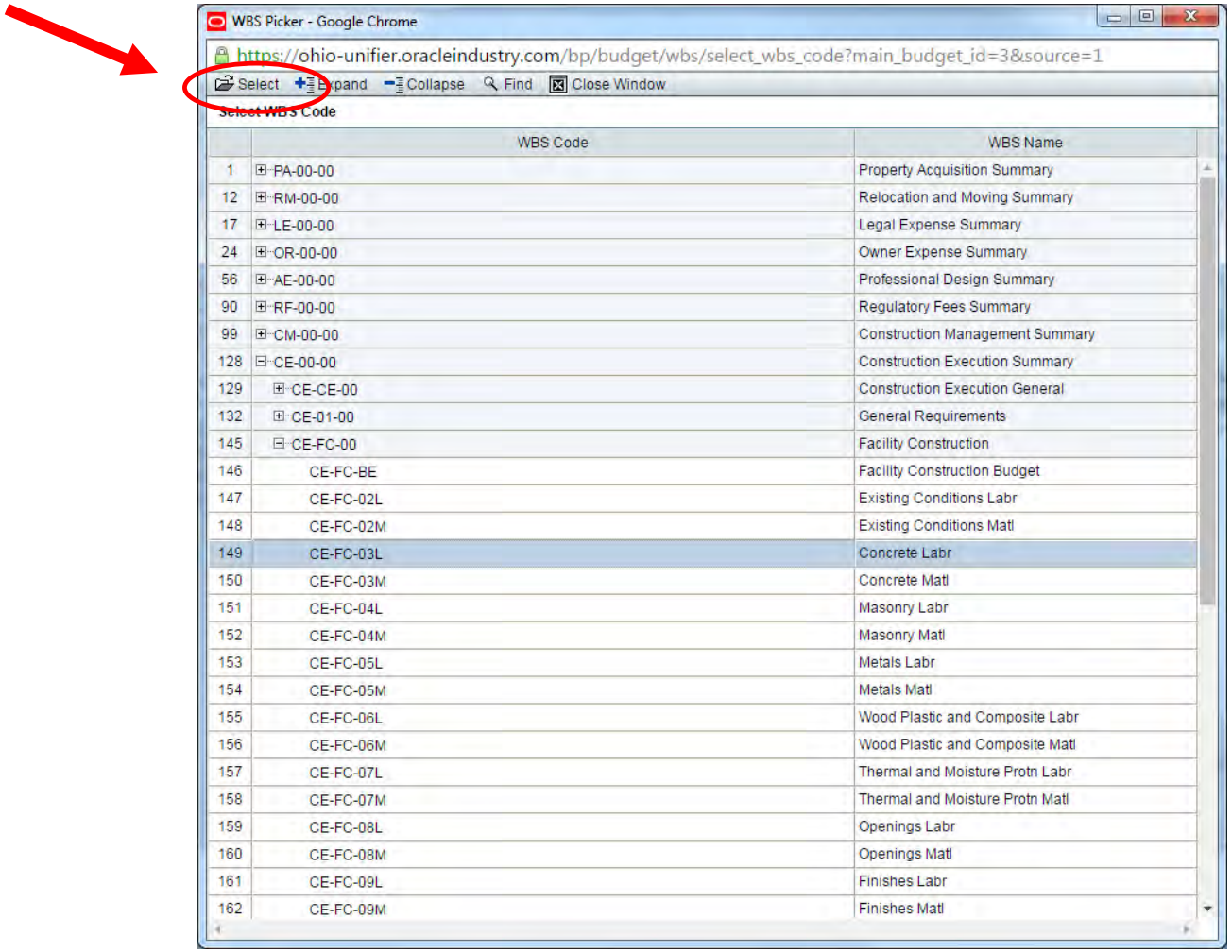
Add a New Line to the SOV

- Click Collapse to simplify the list



Add a New Line to the SOV

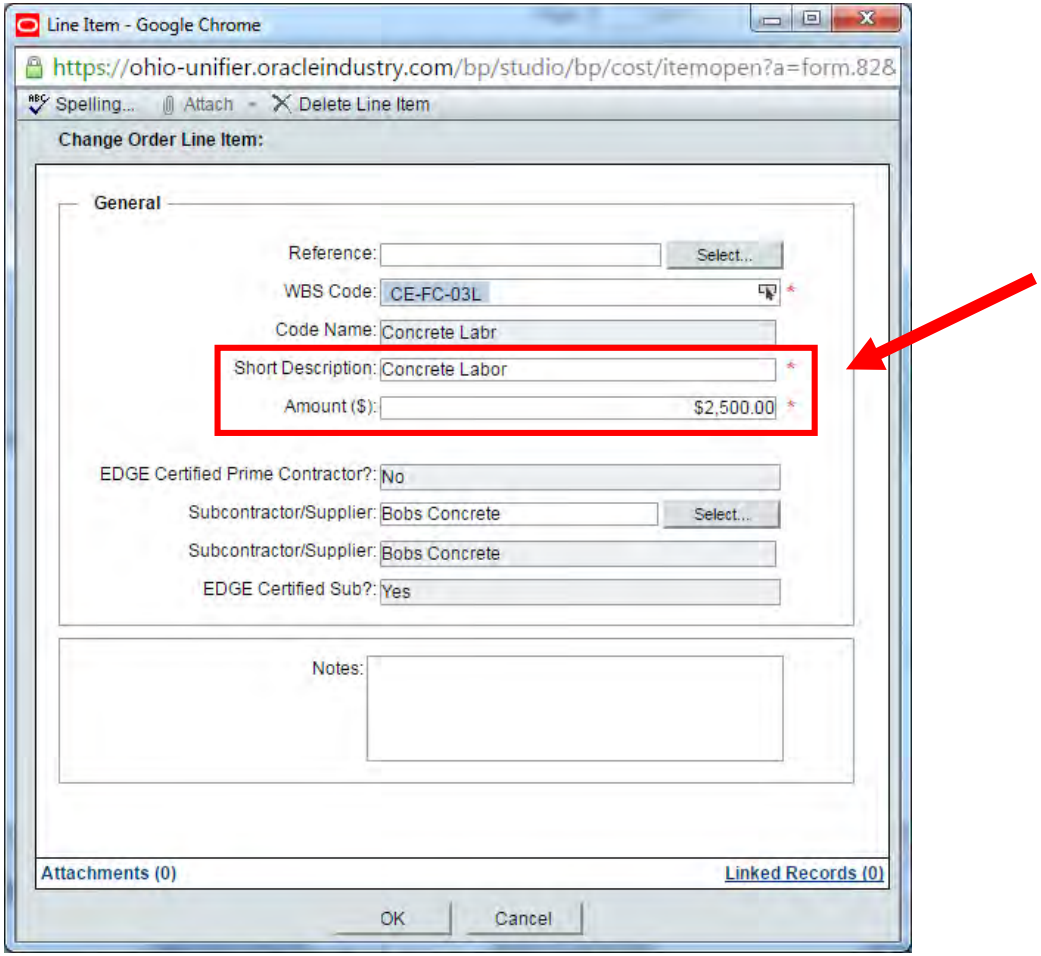
- Click the plus sign next to WBS codes to expand
- Highlight appropriate code and click select



	WBS Code	WBS Name
1	⊞ PA-00-00	Property Acquisition Summary
12	⊞ RM-00-00	Relocation and Moving Summary
17	⊞ LE-00-00	Legal Expense Summary
24	⊞ OR-00-00	Owner Expense Summary
56	⊞ AE-00-00	Professional Design Summary
90	⊞ RF-00-00	Regulatory Fees Summary
99	⊞ CM-00-00	Construction Management Summary
128	⊟ CE-00-00	Construction Execution Summary
129	⊞ CE-CE-00	Construction Execution General
132	⊞ CE-01-00	General Requirements
145	⊟ CE-FC-00	Facility Construction
146	CE-FC-BE	Facility Construction Budget
147	CE-FC-02L	Existing Conditions Labr
148	CE-FC-02M	Existing Conditions Matl
149	CE-FC-03L	Concrete Labr
150	CE-FC-03M	Concrete Matl
151	CE-FC-04L	Masonry Labr
152	CE-FC-04M	Masonry Matl
153	CE-FC-05L	Metals Labr
154	CE-FC-05M	Metals Matl
155	CE-FC-06L	Wood Plastic and Composite Labr
156	CE-FC-06M	Wood Plastic and Composite Matl
157	CE-FC-07L	Thermal and Moisture Protn Labr
158	CE-FC-07M	Thermal and Moisture Protn Matl
159	CE-FC-08L	Openings Labr
160	CE-FC-08M	Openings Matl
161	CE-FC-09L	Finishes Labr
162	CE-FC-09M	Finishes Matl

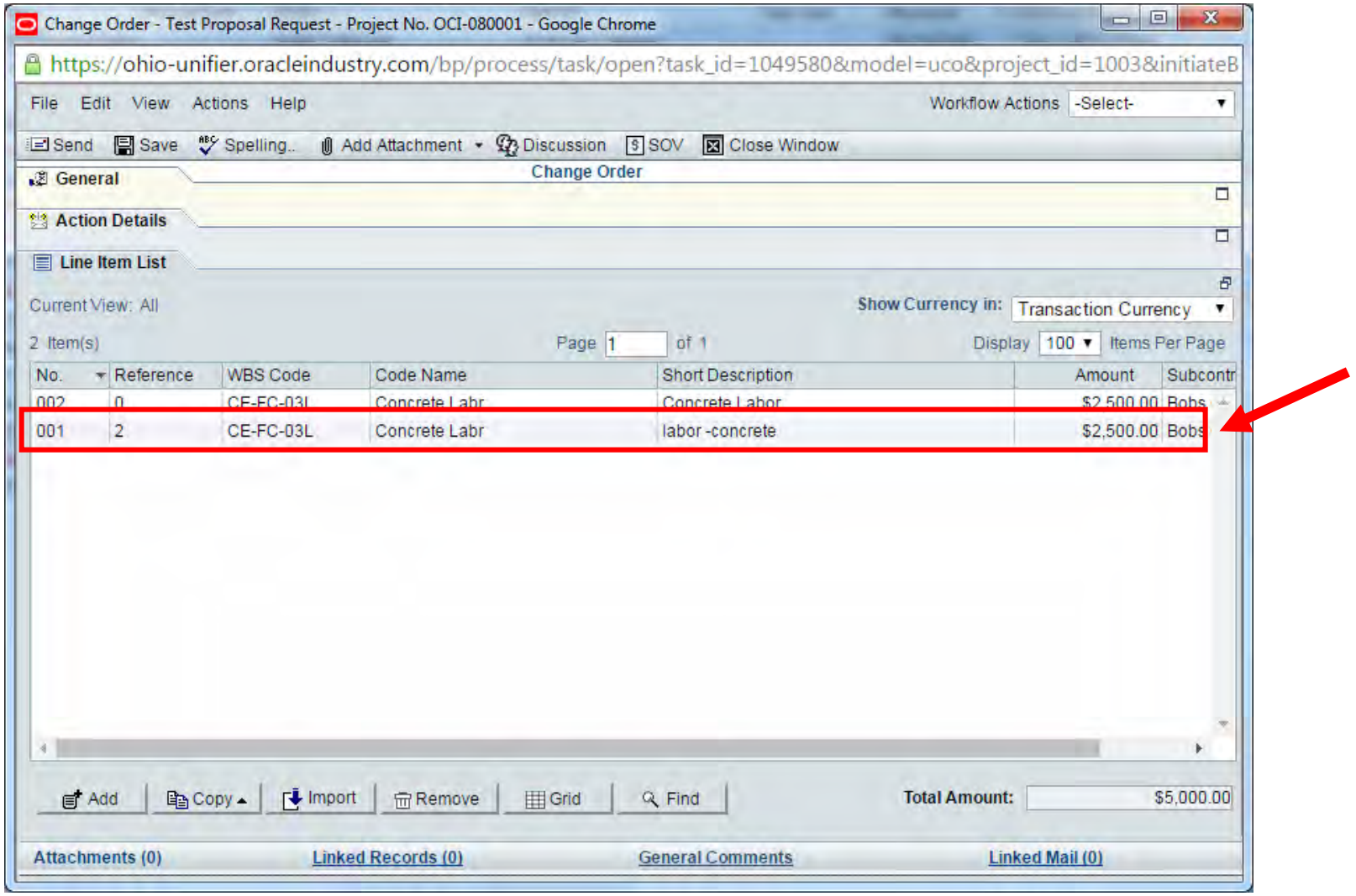
Add a New Line to the SOV

- Information is populated into the form
- Enter a Short Description and the Amount
- Enter any other necessary information
- Click OK



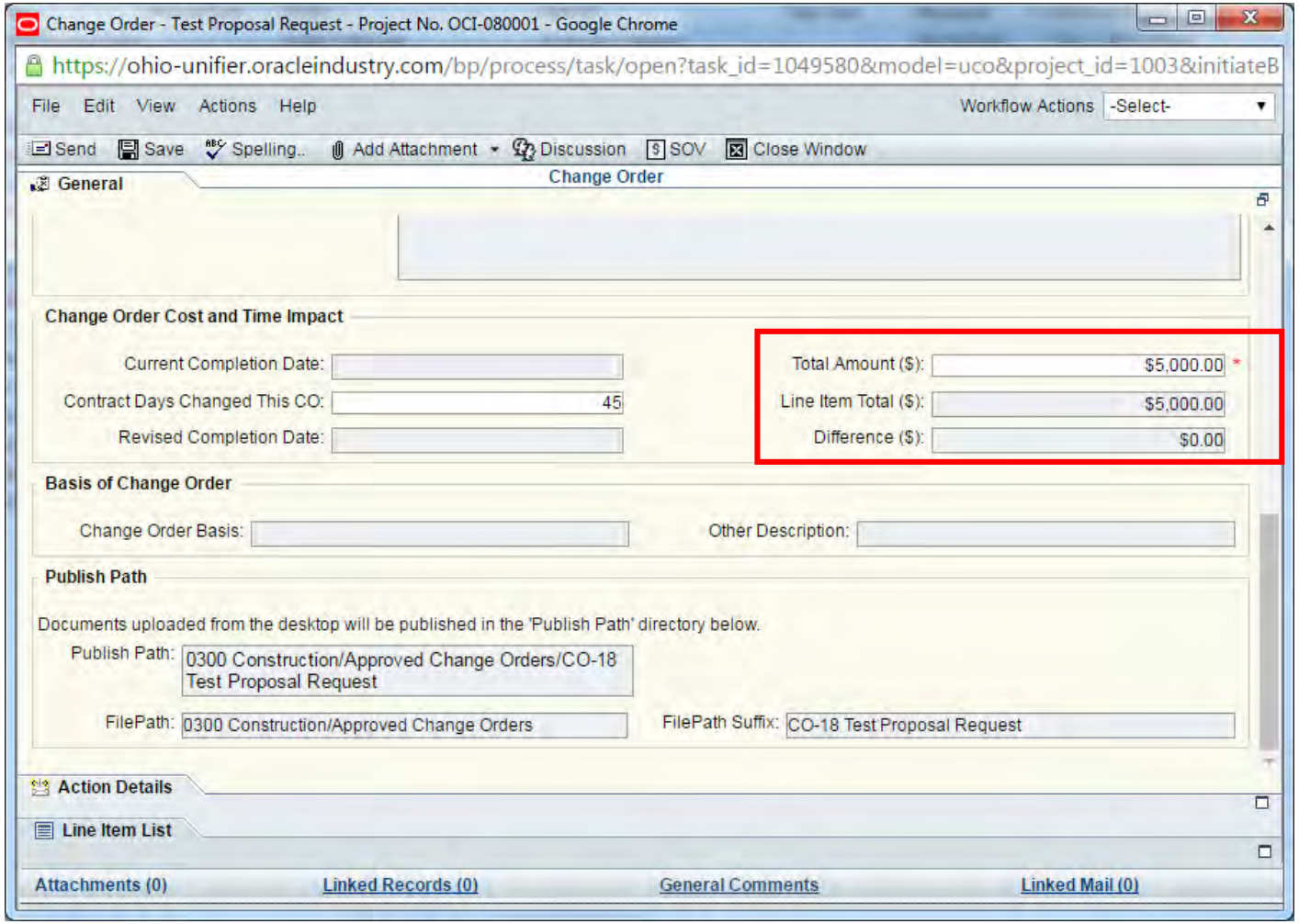
Add a New Line to the SOV

- Line will populate into the lower form of the record



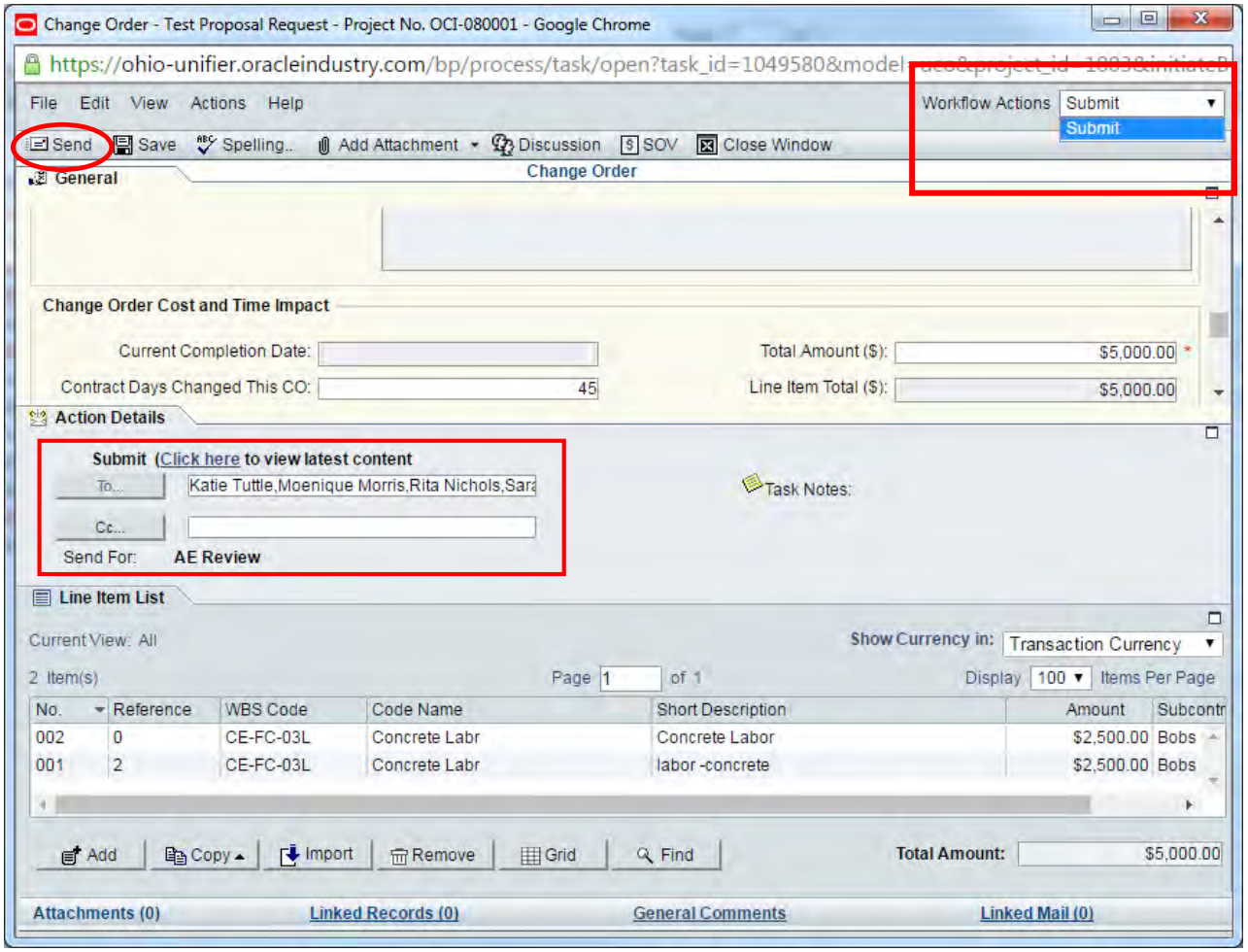
Review Amounts

- Review Change Order Cost and Time Impact Section
- The Difference should always be **$0**



Send the Record

- Send the record to the A/E for Review
- Select Workflow Action: Submit
- Click Send



Questions?

Please contact OAKS CI Support Desk:

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614.644.2211