



Change Order Process

Energy

DocuSign Enabled Record

- ▶ The Change Order record workflows now utilize DocuSign, which enables electronic signature of change orders. These include:
 - ▶ 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 create 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 – Proposal Request

*DocuSign Enabled

Step 1

Proposal Creation

- Project Manager creates 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: PM Review

Step 3

PM Review

Project Manager review record

Submit to: PC for DocuSign

Step 4

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: **OFCC Approval** 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
 - Attach DocuSign Documents
- Submit to: **END**

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means, they will not have the ability to create an Application for Payment until the modification has been Approved or Withdrawn.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:

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" (Project Number: SFC-130315.32, Record Number: CM-0009, Project Name: Prairie Lincoln - New Elementary, Organization Name: South-Western CSD, Facility Name: Prairie Lincoln - New Elementary, Title: PR#03-Visual Display Boards, Creator: Haley Kurmas, Creation Date: 06/02/2015 08:23 AM Local (GMT-5), Status: Approved), "Task Details" (Record has been closed), and "Line Item List". The "Line Item List" section shows a table with one item. A red box highlights the "Reference" field with the value "194", and a red arrow points to it from a box labeled "Correct".

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	

Total Amount: \$ -417.00

Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211