



# Cost Proposal Creation

## K-12 Legacy

# 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](http://docusign.net)
- ▶ For more information about how to use DocuSign, please refer to the DocuSign Job Aid available on the OFCC Website or via this link:  
<http://ofcc.ohio.gov/Resources/OAKSCI/K-12Training.aspx>

# \*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Contract Schedule of Values (SOV) and no Applications for Payment can be created until this Change Order is Approved or Withdrawn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

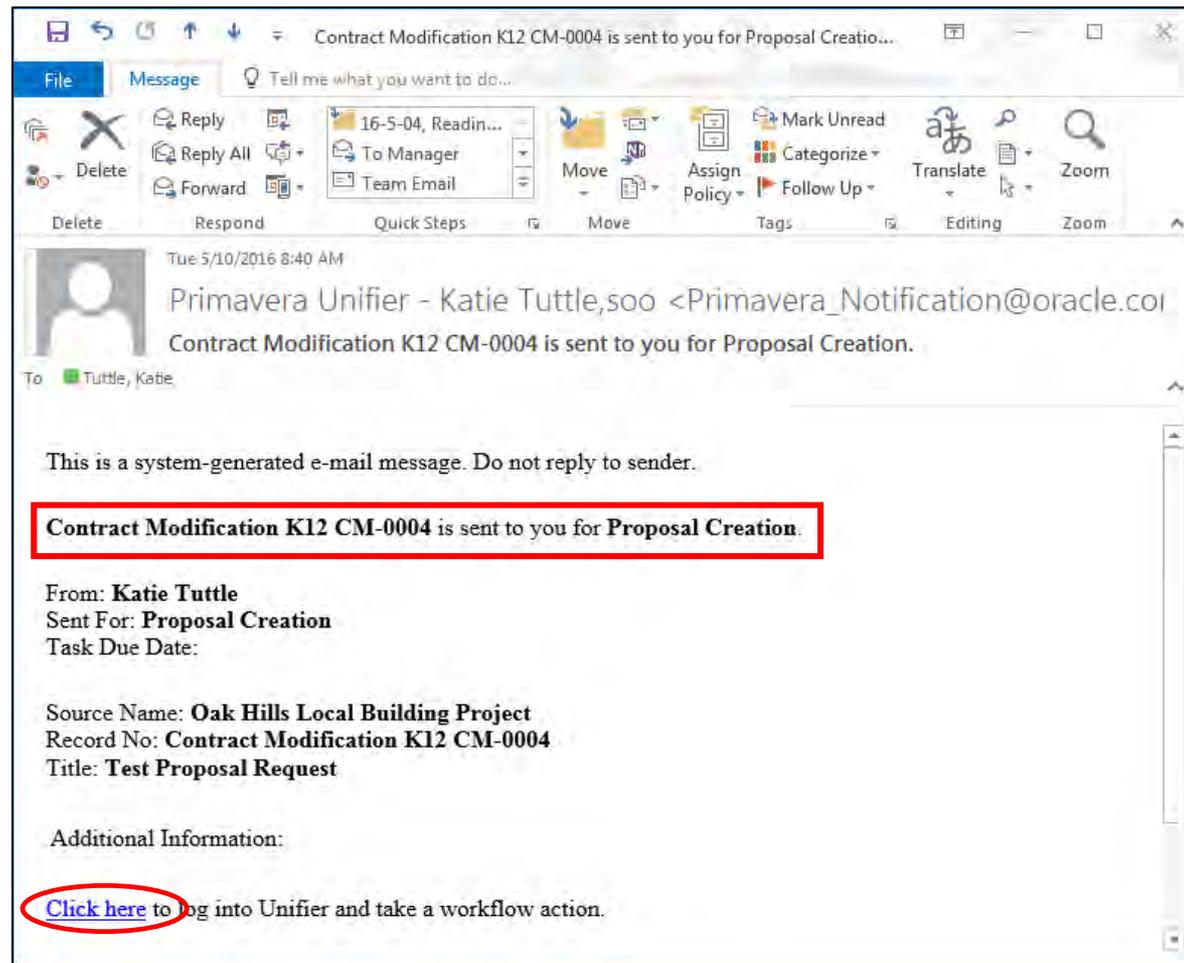
- ▶ Used when the revision to the Contract Schedule of Values will not adversely impact the construction schedule or the finished product if not implemented.
- ▶ The A/E initiates the proposal request and the Contractor provides pricing and time impact.
- ▶ Proposal Requests are labeled in OAKS CI as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

Contract Modification - CO-052: PR 032 Tech Room 416 Ceiling - Project No. SFC-130322.01 - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/studio/bp/log/open?srcid=41578&model=ucm&fromcostlog=1&project\_id=1038

File Edit View Actions Help

Accept Task Decline Task SOV Close Window Contract Modification K12

**General**

General

Project Number: SFC-080001.01 Record Number: CM-0004  
Project Name: Oak Hills Local Building Project Creator: Katie Tuttle  
Organization Name: Creation Date: 05/10/2016 05:40 AM (UTC-8)  
Facility Name: Status: Pending

**Task Details**

From: Katie Tuttle; Task Due Date: Task Notes (0)  
To: Contractor:Katie Tuttle; Task Status: Not Started  
Cc:  
Sent For: Proposal Creation

**Line Item List**

Current View: All Show Currency in: Transaction Currency

0 Item(s) Page 1 of 1 Display 100 Items Per Page

No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor
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Grid Find Total Amount: \$0.00

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

# 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

Contract Modification - CO-052: PR 032 Tech Room 416 Ceiling - Project No. SFC-130322.01 - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/studio/bp/log/open?srcid=4157&model=ucm&fromcostlog=1&project\_id=1038

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

**General** Contract Modification K12

**Change Order Cost and Time Impact**

Enter the Change Order amount and the Contract Days changed if applicable. The current completion date will be added by the project coordinator at a later step.

Current Completion Date:

Contract Days Changed This CO:

Revised Completion Date:

Total Amount (\$):

Line Item Total (\$):

Difference (\$):

**Basis of Change Order**

Change Order Basis:

Other Description:

**Document Publishing**

Documents uploaded from your desktop will be published to the Document Manager in the Publish Path listed below.

Publish Path:

**Action Details**

**Line Item List**

Attachments (0) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

# Add Line Items

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

Contract Modification - CO-052: PR 032 Tech Room 416 Ceiling - Project No. SFC-130322.01 - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/studio/bp/log/open?srcid=4157&model=ucm&fromcostlog=1&project\_id=1038

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

**General** Contract Modification K12

**Change Order Cost and Time Impact**

Enter the Change Order amount and the Contract Days changed if applicable. The current completion date will be added by the project coordinator at a later step.

Current Completion Date:	<input type="text"/>	Total Amount (\$):	<input type="text" value="\$5,000.00"/>
Contract Days Changed This CO:	<input type="text" value="45"/>	Line Item Total (\$):	<input type="text" value="\$0.00"/>
Revised Completion Date:	<input type="text"/>	Difference (\$):	<input type="text" value="\$5,000.00"/>

**Basis of Change Order**

Change Order Basis:  Other Description:

**Document Publishing**

Documents uploaded from your desktop will be published to the Document Manager in the Publish Path listed below.

Publish Path:

**Action Details**

- Line Item List**

Attachments (0) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

# Add Line Items

- ▶ Click Add

Contract Modification - CO-052: PR 032 Tech Room 416 Ceiling - Project No. SFC-130322.01 - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/studio/bp/log/open?srcid=4157&model=ucm&fromcostlog=1&project\_id=1038

File Edit View Actions Help Workflow Actions Submit

Send Save Spelling... Add Attachment Discussion SOV Close Window

General Contract Modification K12

Action Details

Line Item List

Current View: All Show Currency in: Transaction Currency

0 Item(s) Page 1 of 1 Display 100 Items Per Page

No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor
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Add Copy Import Remove Grid Find Total Amount: \$0.00

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

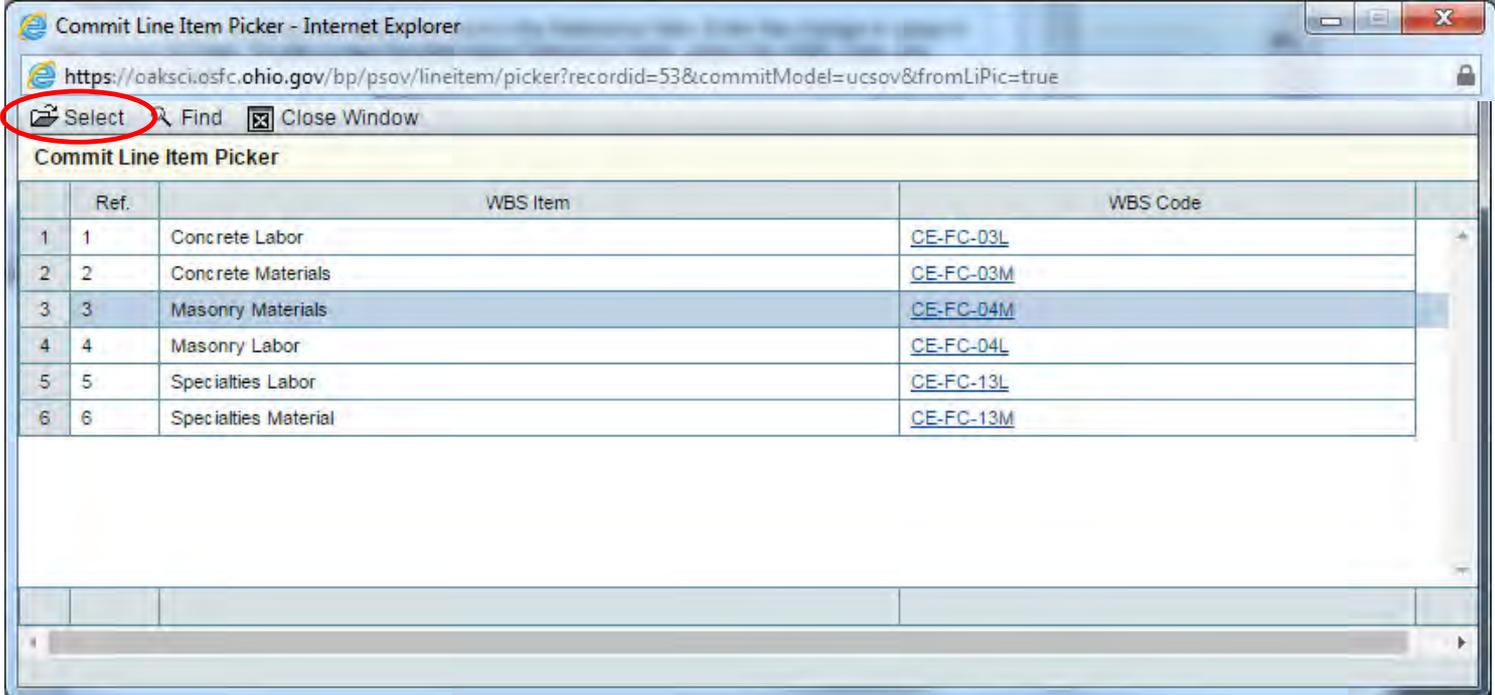
# Change a Current Line on the SOV

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

The screenshot shows a web browser window titled "Line Item - Internet Explorer" with the URL <https://oaksci.osfc.ohio.gov/bp/studio/bp/cost/itemopen?a=form.21&id=0&model=ucm&schemaid=&>. The page content is titled "Contract Modification K12 Line Item:" and contains a "General" section with the following text: "To deduct from an existing line, select the item in the Reference field. Enter the change in value in the Amount (\$) field. To add a new line item leave Reference blank, select the WBS code, and complete the form." Below this text are several input fields: "Reference:" with a "Select..." button circled in red and an arrow pointing to it; "WBS Code:" with a text input field containing "Type a WBS code..."; "Code Name:" with an empty text input field; "Short Description:" with an empty text input field; "Amount (\$):" with a text input field containing "\$0.00"; "Subcontractor/Supplier:" with a text input field and a "Select..." button; "LFI Percent:" with a text input field containing "0"; "District:" with a dropdown menu showing "Oak Hills Local SD"; and "Associated Building:" with a text input field and a "Select..." button. Below the "General" section is a "Details" section with three input fields: "EDGE Certified Prime Contractor?:" with a text input field containing "Yes"; "Subcontractor/Supplier Name:" with an empty text input field; and "EDGE Certified Sub?:" with an empty text input field. At the bottom of the form are "Attachments (0)" and "Linked Records" links, and "OK" and "Cancel" buttons.

# Change a Current Line on the SOV

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



Commit Line Item Picker - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/psov/lineitem/picker?recordid=53&commitModel=ucsov&fromLiPic=true

Select Find Close Window

Commit Line Item Picker

	Ref.	WBS Item	WBS Code
1	1	Concrete Labor	<a href="#">CE-FC-03L</a>
2	2	Concrete Materials	<a href="#">CE-FC-03M</a>
3	3	Masonry Materials	<a href="#">CE-FC-04M</a>
4	4	Masonry Labor	<a href="#">CE-FC-04L</a>
5	5	Specialties Labor	<a href="#">CE-FC-13L</a>
6	6	Specialties Material	<a href="#">CE-FC-13M</a>

# 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

The screenshot shows a web browser window titled "Line Item - Internet Explorer" with the URL <https://oaksci.osfc.ohio.gov/bp/studio/bp/cost/itemopen?a=form.21&id=08&model=ucm&tschemaid=&>. The browser's address bar shows the URL. The page content is titled "Contract Modification K12 Line Item:" and contains a "General" section with the following fields:

- Reference: 3
- WBS Code: CE-FC-04M
- Code Name: Masonry Matl
- Short Description: Masonry Materials
- Amount (\$): \$2,500.00 (highlighted with a red box and a red arrow)
- Subcontractor/Supplier: Joe General Contractor
- LFI Percent: 0
- District: Oak Hills Local SD
- Associated Building: (empty)

Below the "General" section is a "Details" section with the following fields:

- EDGE Certified Prime Contractor?: Yes
- Subcontractor/Supplier Name: Joe General Contractor
- EDGE Certified Sub?: Yes

At the bottom of the form, there are "Attachments (0)" and "Linked Records (0)" links, and "OK" and "Cancel" buttons.

# Change a Current Line on the SOV

- ▶ Line will populate into the lower form of the record

Contract Modification - CO-052: PR 032 Tech Room 416 Ceiling - Project No. SFC-130322.01 - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/studio/bp/log/open?srcid=4157&model=ucm&fromcostlog=1&project\_id=1038

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Contract Modification K12

Action Details

Line Item List

Current View: All Show Currency in: Transaction Currency

2 Item(s) Page 1 of 1 Display 100 Items Per Page

No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor
001	3	CE-FC-04M	Masonry Mat	Masonry Materials	\$2,500.00	0	Joe Genera

Add Copy Import Remove Grid Find Total Amount: \$2,500.00

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

# Add other Line Items

- ▶ Click Add

Contract Modification - CO-052: PR 032 Tech Room 416 Ceiling - Project No. SFC-130322.01 - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/process/task/open?task\_id=458481&model=ucm&project\_id=1038&initiateBP=&bulkautoaccept=&fromRefLog=

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling... Add Attachment Discussion SOV Close Window

General Contract Modification K12

Action Details

Line Item List

Current View: All Show Currency in: Transaction Currency

2 Item(s) Page 1 of 1 Display 100 Items Per Page

No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor
001	3	CE-FC-04M	Masonry Mat	Masonry Materials	\$2,500.00	0	Joe Genera

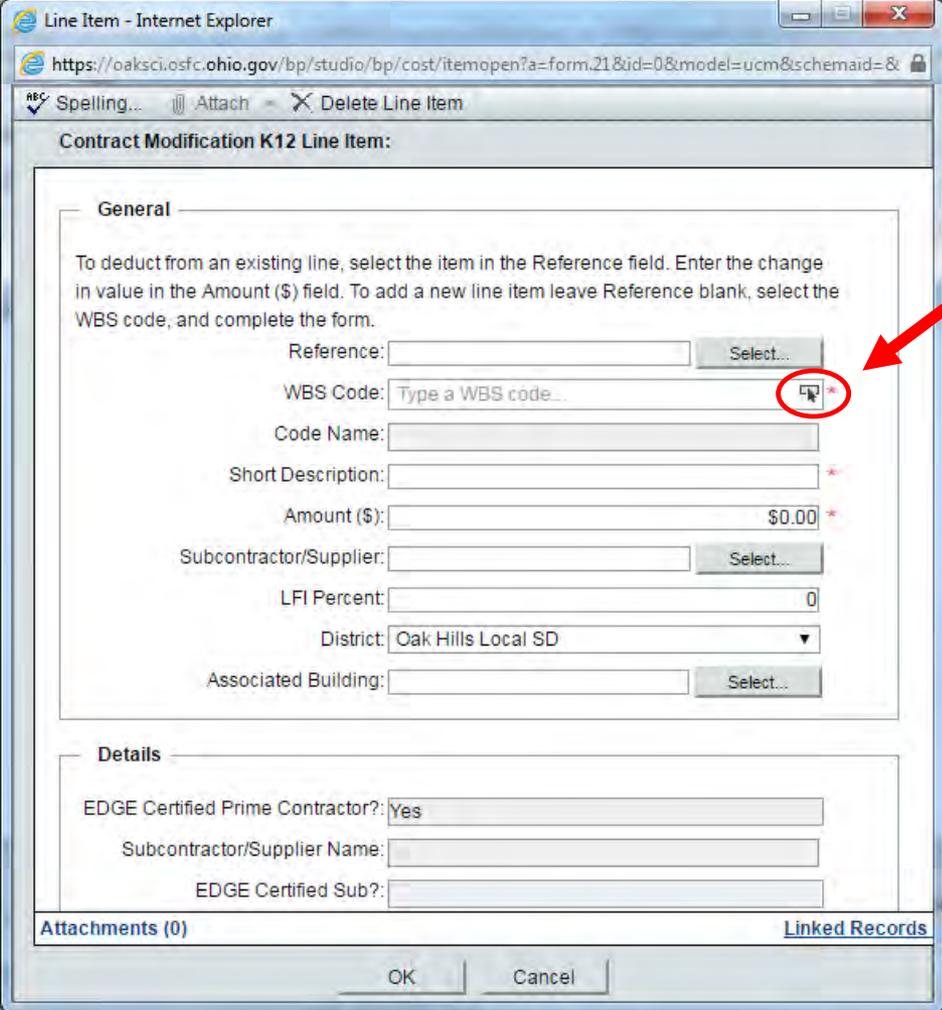
Attachments (0) Linked Records (0) General Comments Linked Mail (0)

Total Amount: \$2,500.00

Buttons: Add, Copy, Import, Remove, Grid, Find

# 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



The screenshot shows a web browser window titled "Line Item - Internet Explorer" with the URL <https://oaksci.osfc.ohio.gov/bp/studio/bp/cost/itemopen?a=form.21&id=0&model=ucm&schemaid=&>. The page content is titled "Contract Modification K12 Line Item:" and contains a "General" section with the following fields and instructions:

To deduct from an existing line, select the item in the Reference field. Enter the change in value in the Amount (\$) field. To add a new line item leave Reference blank, select the WBS code, and complete the form.

Reference:

WBS Code:   \*

Code Name:

Short Description:  \*

Amount (\$):  \*

Subcontractor/Supplier:

LFI Percent:

District:

Associated Building:

The "Add" button next to the WBS Code field is circled in red, and a red arrow points to it from the right. Below the "General" section is a "Details" section with the following fields:

EDGE Certified Prime Contractor?:

Subcontractor/Supplier Name:

EDGE Certified Sub?:

At the bottom of the form, there are "Attachments (0)" and "Linked Records" links, and "OK" and "Cancel" buttons.

# Add a New Line to the SOV

- ▶ Click Collapse to simplify the list

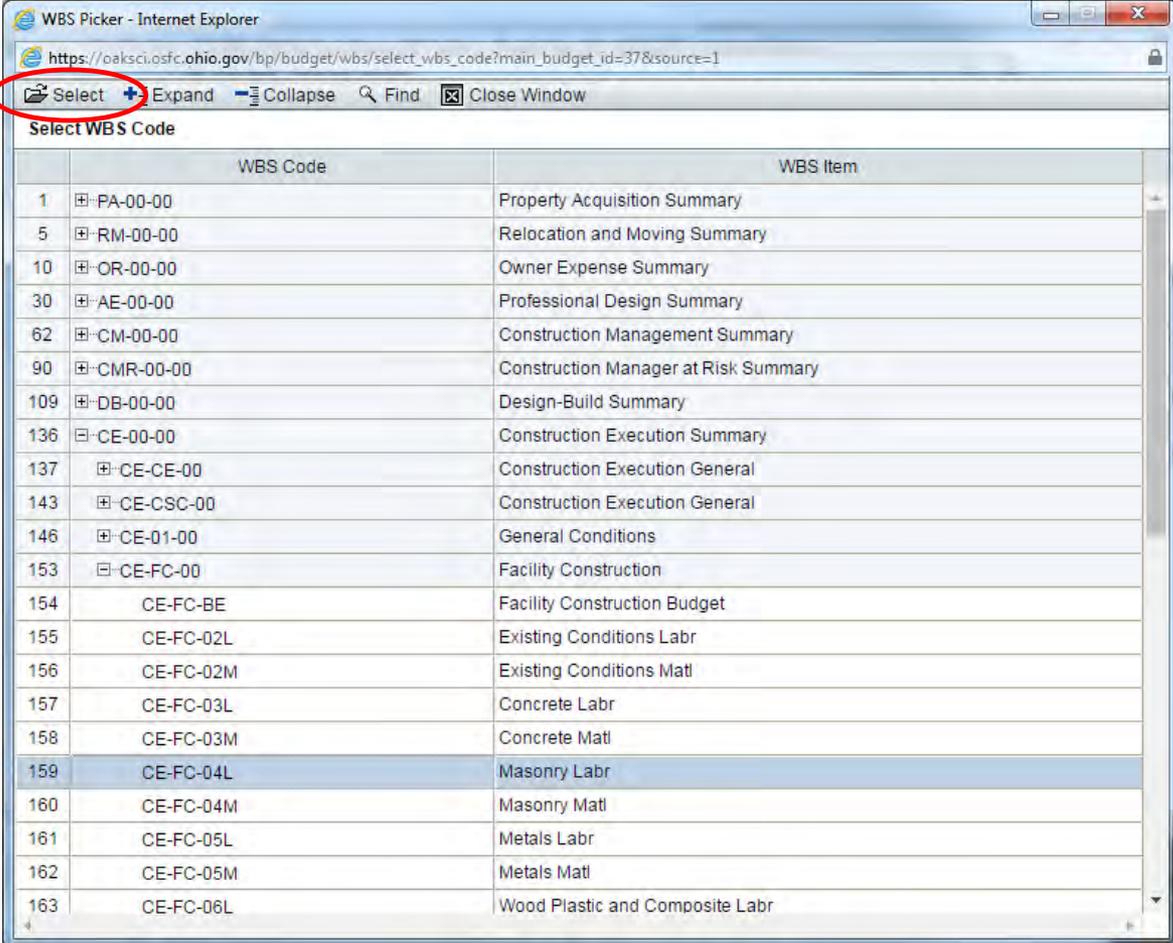
The screenshot shows two instances of the 'WBS Picker' application. The top instance shows a list of WBS codes with a red circle around the 'Collapse' button and a red arrow pointing to it. The bottom instance shows the same list after the 'Collapse' button has been clicked, resulting in a simplified view of the WBS codes and their corresponding items.

	WBS Code	WBS Item
1	PA-00-00	Property Acquisition Summary
5	RM-00-00	Relocation and Moving Summary
10	OR-00-00	Owner Expense Summary
30	AE-00-00	Professional Design Summary
62	CM-00-00	Construction Management Summary
90	CMR-00-00	Construction Manager at Risk Summary
109	DB-00-00	Design-Build Summary
136	CE-00-00	Construction Execution Summary
225	CX-00-00	Commissioning Summary
247	FE-00-00	F F and E Summary
258	ES-00-00	Energy Services Summary

	WBS Code	WBS Item
1	PA-00-00	Property Acquisition Summary
5	RM-00-00	Relocation and Moving Summary
10	OR-00-00	Owner Expense Summary
30	AE-00-00	Professional Design Summary
62	CM-00-00	Construction Management Summary
90	CMR-00-00	Construction Manager at Risk Summary
109	DB-00-00	Design-Build Summary
136	CE-00-00	Construction Execution Summary
225	CX-00-00	Commissioning Summary
247	FE-00-00	F F and E Summary
258	ES-00-00	Energy Services Summary
	OR	Tests and Inspections
	OR	Site Surveying Services
	OR	Geotechnical Investigation
	OR	Environmental Survey
	OR	Partnering Facilitation
	OR	Other Expense
	OR	CF
	OR	CF-BE
	OR	CF-OC
	OR	CF-AE

# Add a New Line to the SOV

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



The screenshot shows the 'WBS Picker' application in Internet Explorer. The browser address bar displays the URL: [https://oaksci.osfc.ohio.gov/bp/budget/wbs/select\\_wbs\\_code?main\\_budget\\_id=37&source=1](https://oaksci.osfc.ohio.gov/bp/budget/wbs/select_wbs_code?main_budget_id=37&source=1). The application toolbar includes buttons for 'Select', 'Expand', 'Collapse', 'Find', and 'Close Window'. A red arrow points to the 'Select' button. Below the toolbar is a table titled 'Select WBS Code' with two columns: 'WBS Code' and 'WBS Item'. The table contains 17 rows of data. The row for WBS Code 'CE-FC-04L' is highlighted in blue.

	WBS Code	WBS Item
1	PA-00-00	Property Acquisition Summary
5	RM-00-00	Relocation and Moving Summary
10	OR-00-00	Owner Expense Summary
30	AE-00-00	Professional Design Summary
62	CM-00-00	Construction Management Summary
90	CMR-00-00	Construction Manager at Risk Summary
109	DB-00-00	Design-Build Summary
136	CE-00-00	Construction Execution Summary
137	CE-CE-00	Construction Execution General
143	CE-CSC-00	Construction Execution General
146	CE-01-00	General Conditions
153	CE-FC-00	Facility Construction
154	CE-FC-BE	Facility Construction Budget
155	CE-FC-02L	Existing Conditions Labr
156	CE-FC-02M	Existing Conditions Matl
157	CE-FC-03L	Concrete Labr
158	CE-FC-03M	Concrete Matl
159	CE-FC-04L	Masonry Labr
160	CE-FC-04M	Masonry Matl
161	CE-FC-05L	Metals Labr
162	CE-FC-05M	Metals Matl
163	CE-FC-06L	Wood Plastic and Composite Labr

# 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

The screenshot shows a web browser window titled "Line Item - Internet Explorer" with the URL <https://oaksci.osfc.ohio.gov/bp/studio/bp/cost/itemopen?a=form.21&id=0&model=ucm&schemaid=6>. The page content is titled "Contract Modification K12 Line Item:" and contains a "General" section with the following fields:

- Reference:  Select...
- WBS Code:  \*
- Code Name:
- Short Description:  \*
- Amount (\$):  \*
- Subcontractor/Supplier:  Select...
- LFI Percent:
- District:
- Associated Building:  Select...

Below the "General" section is a "Details" section with the following fields:

- EDGE Certified Prime Contractor?:
- Subcontractor/Supplier Name:
- EDGE Certified Sub?:

At the bottom of the form, there are "Attachments (0)" and "Linked Records (0)" links, and "OK" and "Cancel" buttons.

A red box highlights the "Short Description" and "Amount (\$)" fields, and a red arrow points to the "Short Description" field.

# Add a New Line to the SOV

- ▶ Line will populate into the lower form of the record

Contract Modification - CO-052: PR 032 Tech Room 416 Ceiling - Project No. SFC-130322.01 - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/studio/bp/log/open?srcid=4157&model=ucm&fromcostlog=1&project\_id=1038

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

General Contract Modification K12

Action Details

Line Item List

Current View: All Show Currency in: Transaction Currency

2 Item(s) Page 1 of 1 Display 100 Items Per Page

No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor
001	3	CE-FC-04M	Masonry Matl	Masonry Materials	\$2,500.00	0	Joe Gener
002	0	CE-FC-04L	Masonry Labr	Masonry Labor	\$2,500.00	0	Joe Gener

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

Total Amount: \$5,000.00

# Review Amounts

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

Contract Modification - CO-052: PR 032 Tech Room 416 Ceiling - Project No. SFC-130322.01 - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/studio/bp/log/open?srcid=4157&model=ucm&fromcostlog=1&project\_id=1038

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Add Attachment Discussion SOV Close Window

**General** Contract Modification K12

**Change Order Cost and Time Impact**

Enter the Change Order amount and the Contract Days changed if applicable. The current completion date will be added by the project coordinator at a later step.

Current Completion Date:

Contract Days Changed This CO:

Revised Completion Date:

Total Amount (\$):  \*

Line Item Total (\$):

Difference (\$):

**Basis of Change Order**

Change Order Basis:  Other Description:

**Document Publishing**

Documents uploaded from your desktop will be published to the Document Manager in the Publish Path listed below.

Publish Path:

**Notes**

**Action Details**

**Line Item List**

Attachments (0) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

# Send the Record

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

Contract Modification - CO-052: PR 032 Tech Room 416 Ceiling - Project No. SFC-130322.01 - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/studio/bp/log/open?srcid=4157&model=ucm&fromcostlog=1&project\_id=1038

File Edit View Actions Help

Send Save Spelling... Add Attachment Discussion SOV Close Window

Workflow Actions Submit Submit Reject

General Contract Modification K12

Change Order Cost and Time Impact

Enter the Change Order amount and the Contract Days changed if applicable. The current completion date will be added by the project coordinator at a later step.

Current Completion Date: Total Amount (\$): \$5,000.00

Contract Days Changed This CO: 45 Line Item Total (\$): \$0.00

Action Details

Submit (Click here to view latest content)

To... Barbara Taylor, Katie Tuttle, Kaylie Ruf, Moeniq

Cc...

Send For: AE Review

Task Notes:

Line Item List

Current View: All Show Currency in: Transaction Currency

0 Item(s) Page 1 of 1 Display 100 Items Per Page

No.	Reference	WBS Code	Code Name	Short Description	Amount	LFI Percent	Subcontractor
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Attachments (0) Linked Records (0) General Comments Linked Mail (0)

# Questions?

Please contact OAKS CI Support Desk:

[oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)

614.644.2211