Expedited Deduct Change Order

OAKS Capital Improvements

OFCC
OHIO FACILITIES CONSTRUCTION COMMISSION

Purpose and Process

‣ Used when there is a change order that will contain deduct lines.

‣ Using this process **will not** lock the schedule of values.

‣ **Workflow:**

Created by: A/E → Sent to: Contractor for Proposal Creation (add lower lines) → Sent to: PC for DocuSign → PC then creates the DocuSign document. Once DocuSign process is complete, PC will attach DocuSign document and End the record.

A/E Selects Workflow

‣ A/E will select the Expedited Deduct Change Order workflow
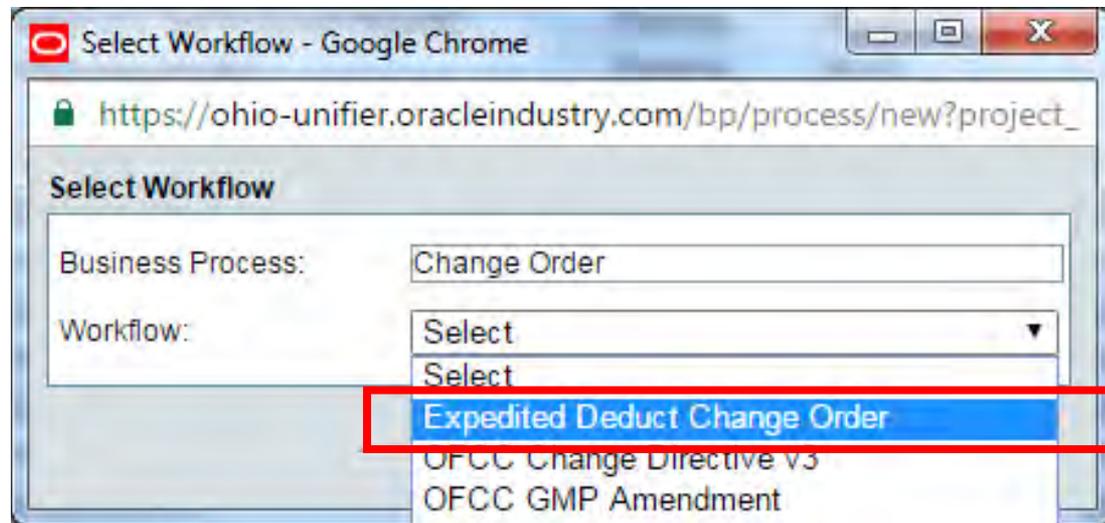
A/E Creates Record

‣ A/E will complete the General section including:
   ‣ Title, Contract Reference, Change order type, Change order number

A/E Creates Record

‣ A/E will complete the Change Order Details section including:
  ‣ Description of Work and Justification

A/E Creates Record

‣ A/E will also now complete the Change Order Basis field

A/E Sends Record

‣ Choose workflow action "Expedite Change Order"

‣ In Action Details the "To" box will be populated with the people who the record should go to.

‣ Click Send

Contractor enters Amount

‣ When the Contractor receives the task, enter the "Total Amount" in the General form.

‣ Add any necessary documentation

Contractor adds Lines

‣ Next, add all necessary lines to the bottom of the change order.
  ‣ **Note:** Make sure to use the **Reference** option for deduct lines

‣ Enter Amount

Contractor adds Lines

‣ All deduct lines should have a **Reference** number

‣ All add lines should have a **0**

Contractor adds Lines

‣ Then select the workflow action "Tasks Completed" and the record will go to the PC for DocuSign

‣ Click send

‣ Note: Sending this change order will **NOT** lock the schedule of values

PC Step

- When the PC receives the task in OAKS CI:
  - Ensure the Contractor has added the lines on the lower form
  - Create DocuSign document from custom print
  - Circulate change order via DocuSign

Important Note: Once you Accept the task, do not Unaccept the task because it will erase the lines the contractor added to the form.

PC Step

‣ Once the change order has been fully executed in DocuSign:

 ‣ Upload fully executed DocuSign change order and attach to OAKS CI record

 ‣ **Enter the Contracting Authority Date**

 ‣ Choose Workflow Action "Tasks Completed" and click Send to end the record

Questions?

Please contact OAKS CI Support Desk:

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