



# Contract Modifications Workflow Processes

# DocuSign Enabled BP

- ▶ The Contract Modification Business Process (BP) now has three workflows that utilize DocuSign, which enables electronic signature of change orders.
  - ▶ GMP Amendment
  - ▶ Proposal Request
  - ▶ Request for Change Order
- ▶ Users who are sent a Contract Modification for signature via DocuSign do not need a separate account to sign the document.
- ▶ 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>

# Change Order – GMP Amendment

\*DocuSign Enabled

## Step 1

### Amendment Creation

- Created by the Project Coordinator
- **Submit to: PM Review**

## Step 2

### PM Review

PM Review Record

**Submit to: PC Validation**

## Step 3

### PC Validation and DocuSign

PC prepares Change Order in DocuSign

**Submit for signature via DocuSign**

## Step 4

### Signature via DocuSign

Contractor, School District, and Contracting Authority review and sign via DocuSign

**Submit to: Project Coordinator**

## Step 5

### Project Coordinator

Finish record in OAKS CI  
Attach DocuSign Documents

**Submit to: END**

# Contract Modification – Proposal Request

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## Step 1

### Proposal Creation

- 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

### 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**

# Contract Modification – Proposal Request

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## Step 6

- Contractor
- Review and Sign via DocuSign
- Sent to: **District Approval via DocuSign**

## Step 7

- School District Rep and Treasurer
- Enter Purchase Order number in DocuSign
- 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**

# Contract Modification – 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 3

### A/E Review

Review cost proposal enter change order number

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**

# Contract Modification – Request for Change Order

## \*DocuSign Enabled

### Step 6

- Contractor
- Review and Sign via DocuSign
- Sent to: **District Approval via DocuSign**

### Step 7

- School District Rep and Treasurer
- Enter Purchase Order number
- 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
- Add DocuSign Documents
- Submit to: **END**

# **Critical Notes about Contract Modifications**

# Important Note

**There are two critical issues we would like to remind everyone of during the creation of a deduct Contract Modification:**

Any Contract Modification 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 contract modification with the deduct lines.

Another issue that seems to slow down the approval of the deduct contract modification occurs when lines from the SOV are not referenced. When creating the Contract Modification, the contractor must ensure that they are referencing the line they wish to deduct from. **EVERYONE reviewing** the Contract Modification 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 Contract Modification please go to the OFCC Website under Resources and Training.

# Reference a Line when Deducting

When creating a Contract Modification 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 Contract Modification which contains deduct lines, you must look for the referenced SOV line, it should NEVER be zero:

The screenshot shows a web application window titled "Contract Modification - PR#03-Visual Display Boards - Project No. SFC-130315.32 - Windows Internet Explorer". The application has a menu bar (File, Edit, View, Actions, Help) and a toolbar with buttons for Save, Spelling, Add Attachment, SOV, and Close Window. The main content area is divided into sections:

- General:** Contains fields for 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)), and Status (Approved).
- Task Details:** Shows a message "Record has been closed." with a link to view process details.
- Line Item List:** Shows a table with 1 item(s). The table has columns: No., Reference, WBS Code, Code Name, Short Description, Amount, LFI Percent, and Subcontractor/Sup. The first row contains: 001, 194, CE-C10-10M, CE Interior Const Specialty, Visual Display Surfaces - Material, -417.00, 0, and Subcontractor/Sup. A red box highlights the "Reference" field with the value "194", and a red arrow points to it from a box labeled "Correct".

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

# Questions?

Please contact OAKS CI Support Desk:

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