OAKS
Capital Improvements

Proposal Request

K12

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 or via this link: http://ofcc.ohio.gov/Resources/OAKSCI/K-12Training.aspx

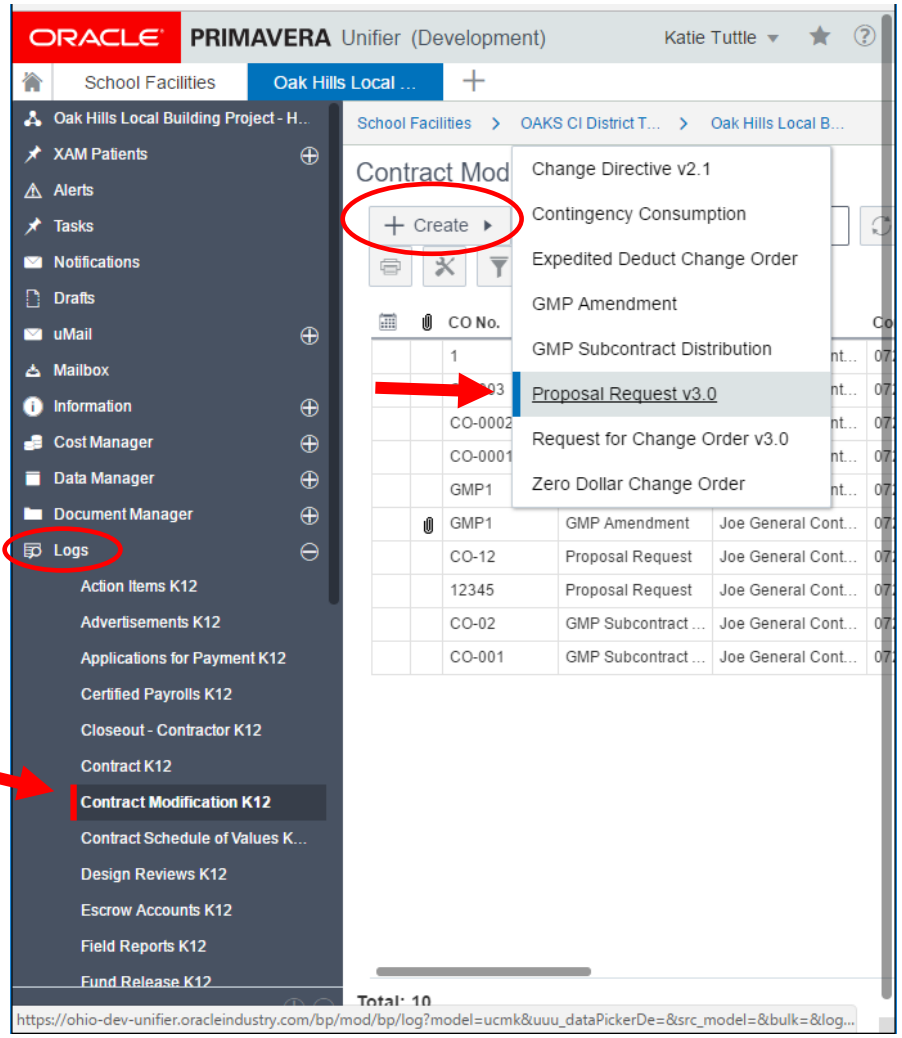
Purpose and Process

- 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: Vendor signature via DocuSign

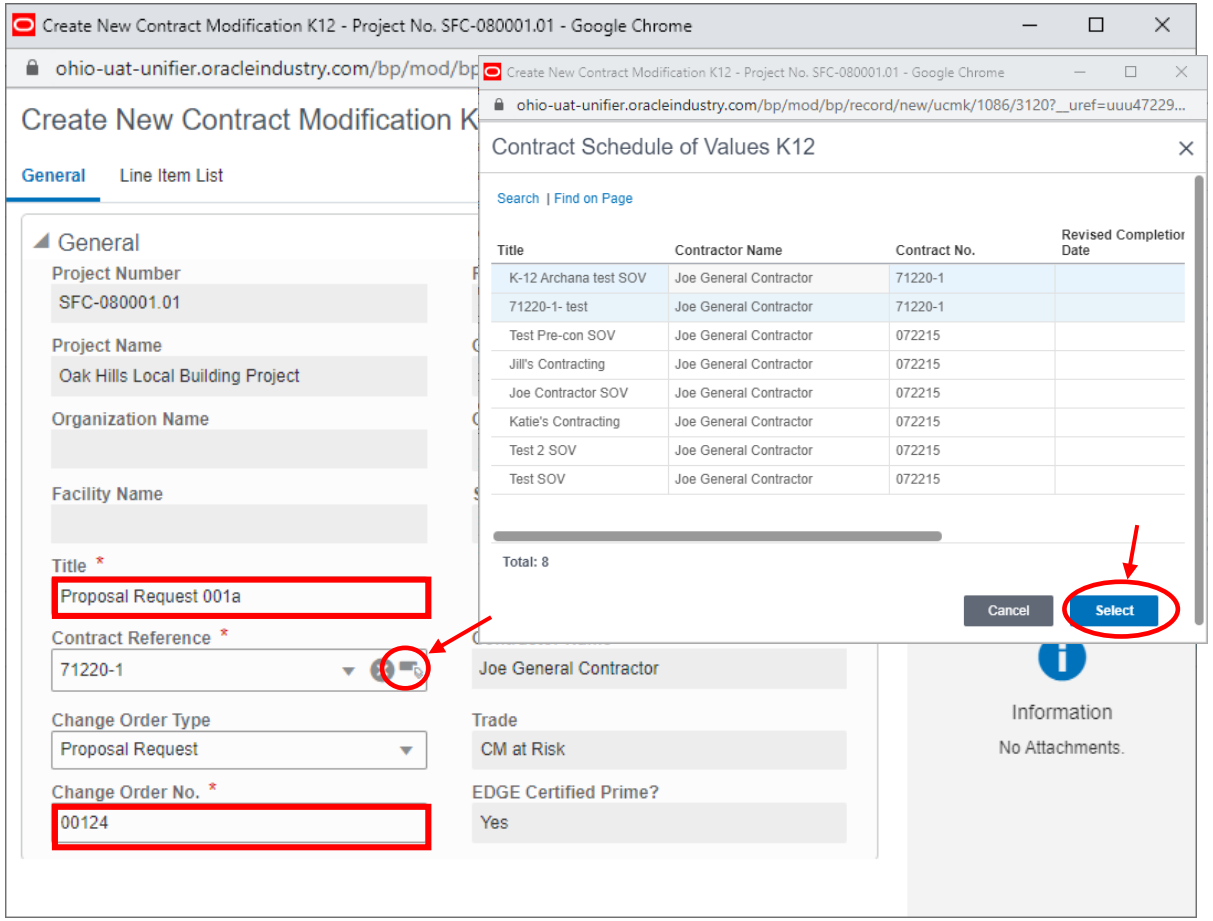
Proposal Request Creation

- In OAKS CI navigate to:
  - Logs -> **Contract Modifications K12**
  - Click **Create**
  - Select **Proposal Request Workflow**



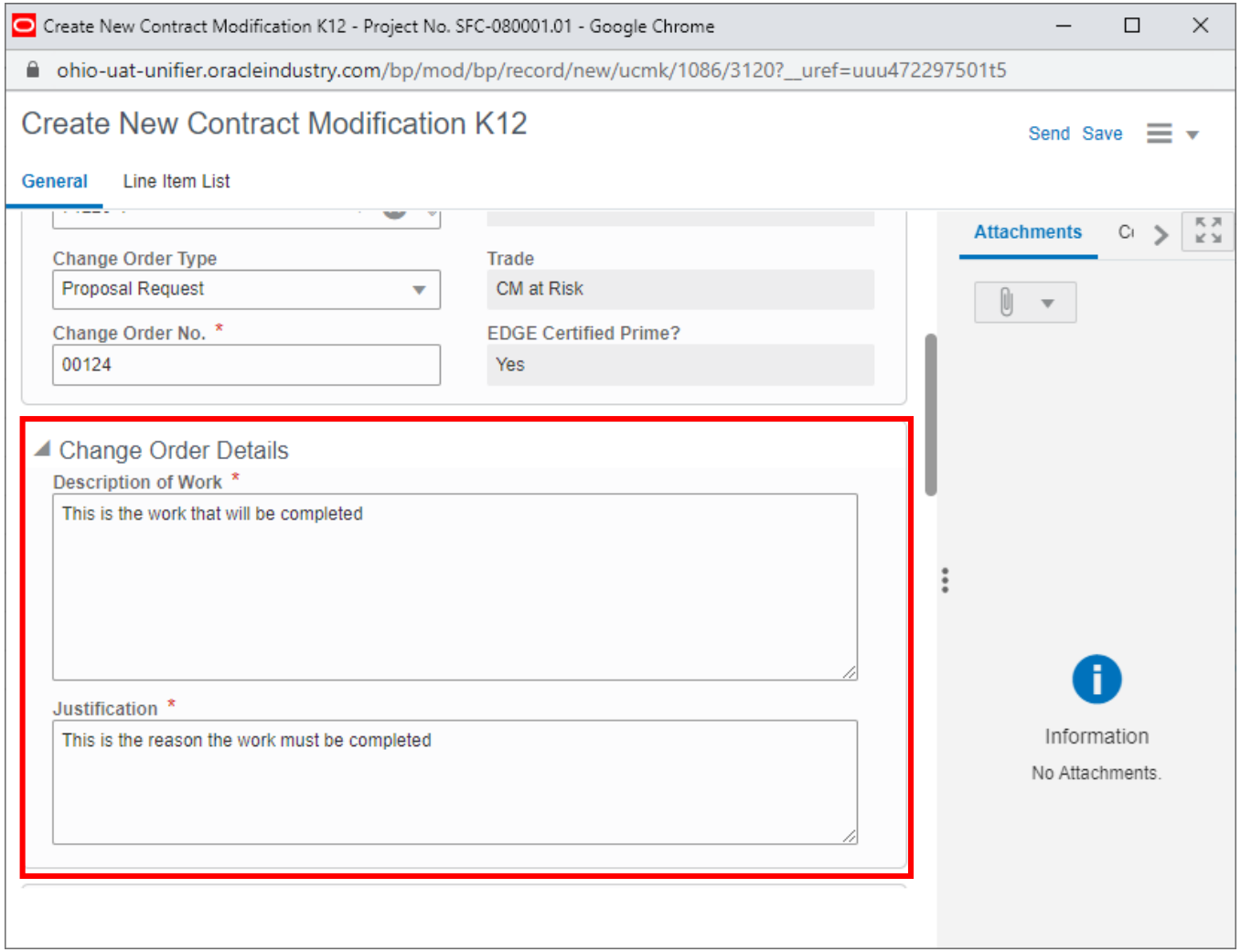
Complete General Block

- All fields marked with a red * are required
- Click **Select** to choose the **Contract Reference**
- Fill out any additional information



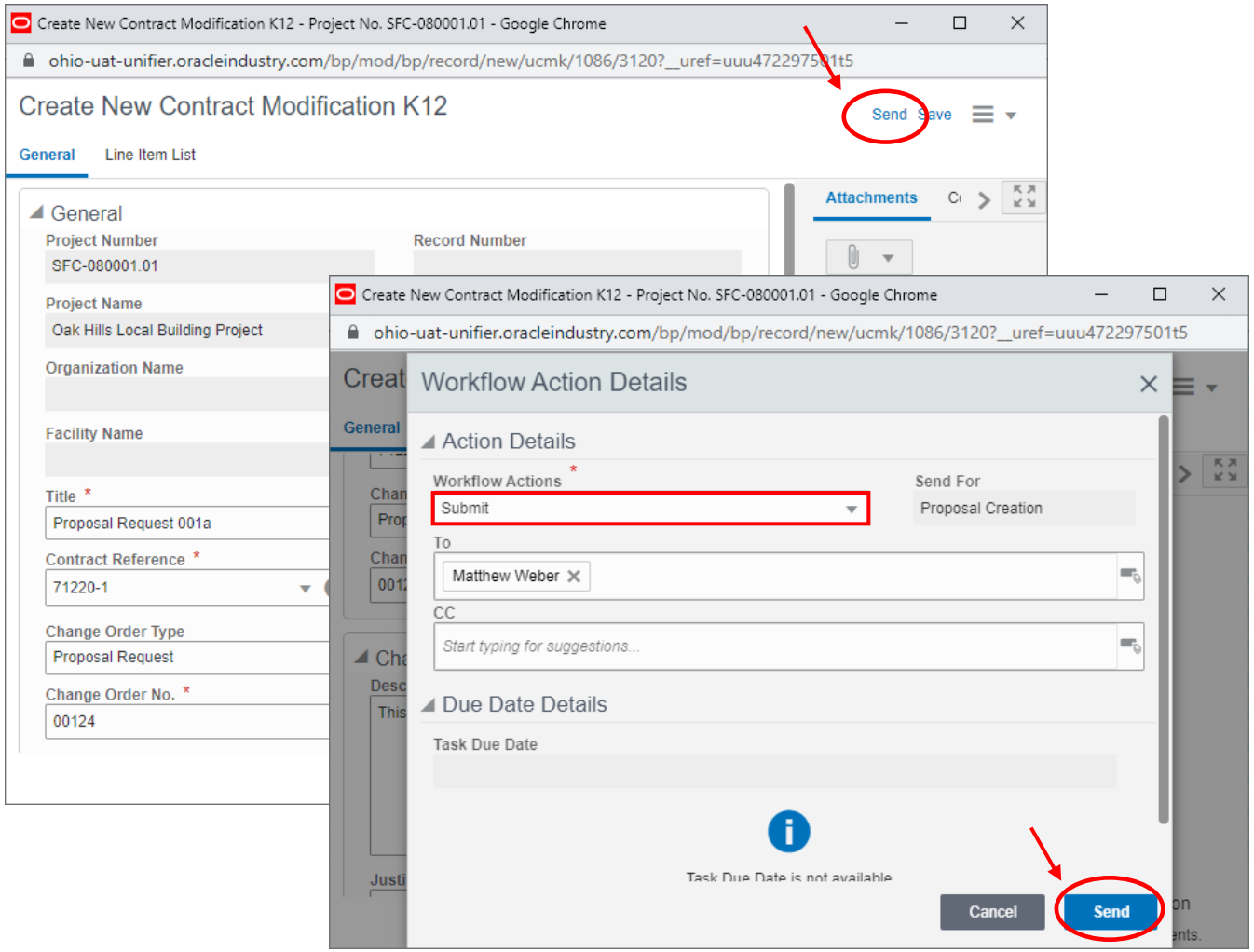
Change Order Details

- Scroll down to the **Change Order Details** section
- Fill out the **Description of Work** and **Justification** fields



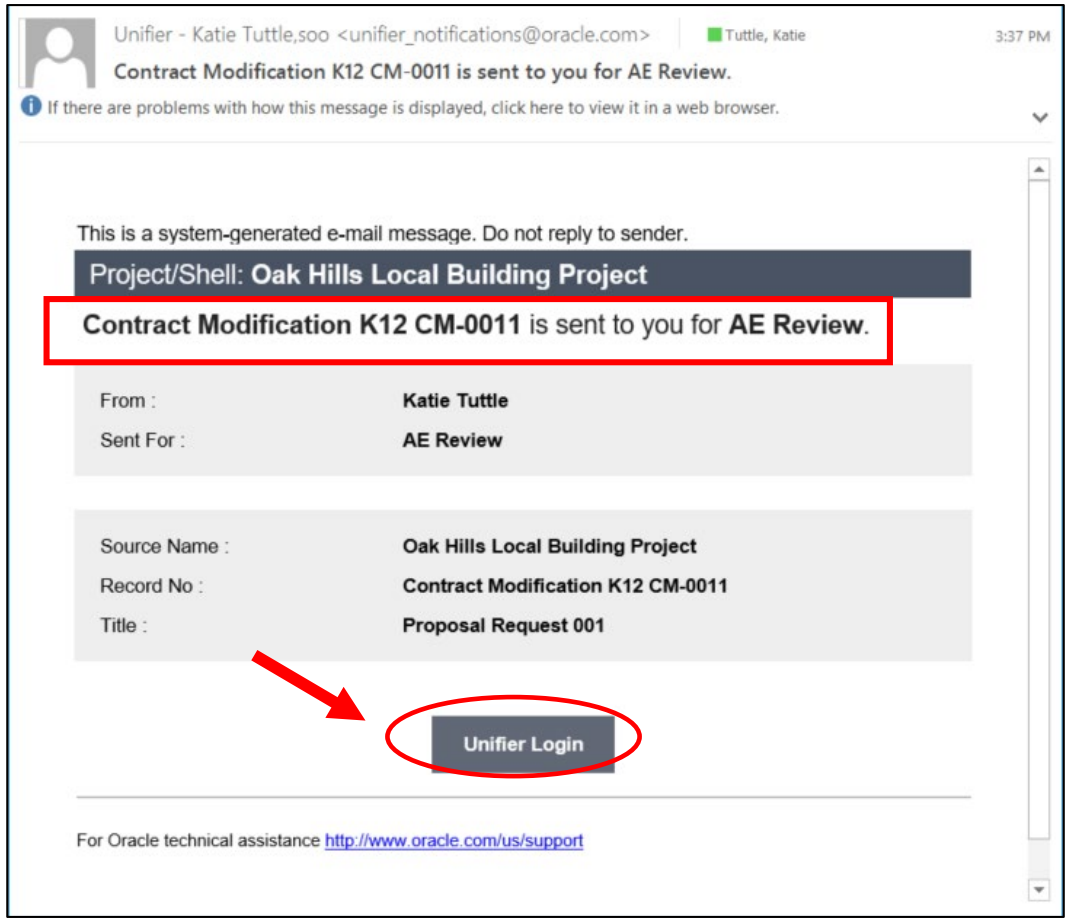
Send the Record

- When the record is ready to move forward, click the **Send** button at the top of the record
- Verify Workflow Action: **Submit**
- Click **Send**



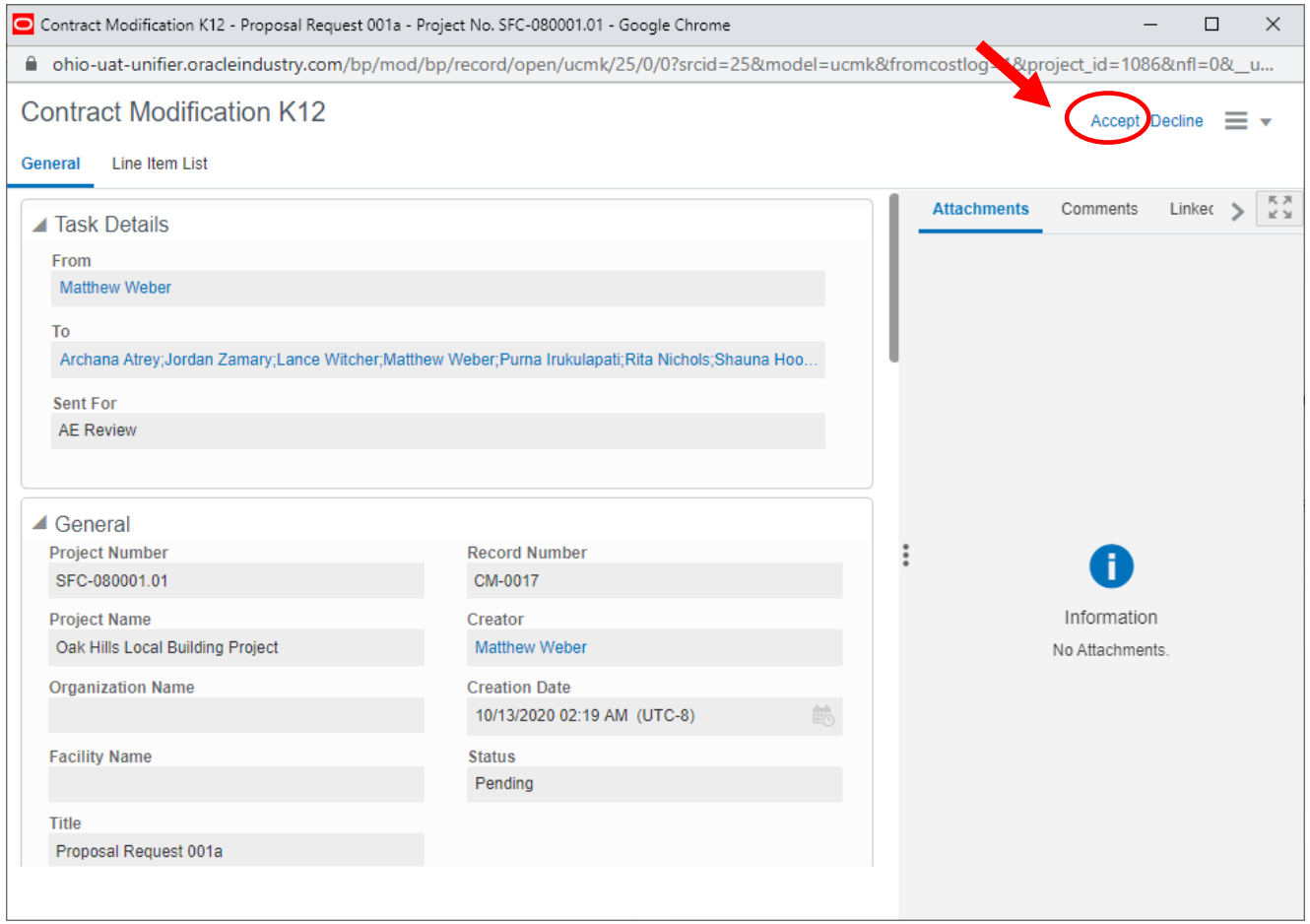
A/E Review

- Once the Contractor creates the Proposal, it will come back to the A/E for Review
- The A/E will receive an email notification that they have a Task to complete in OAKS CI
- Click on the “Unifier Login” link to access the Task



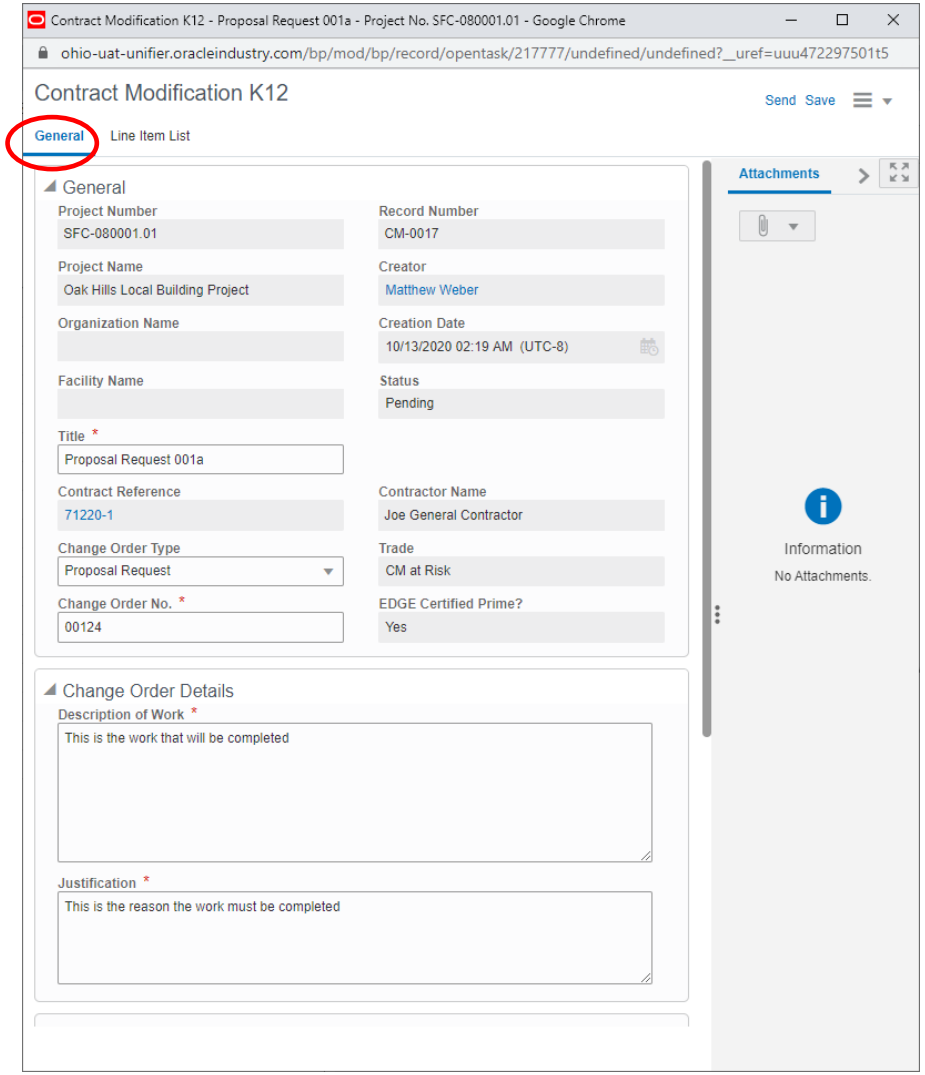
A/E Review

- Click **Accept** to begin work on the record



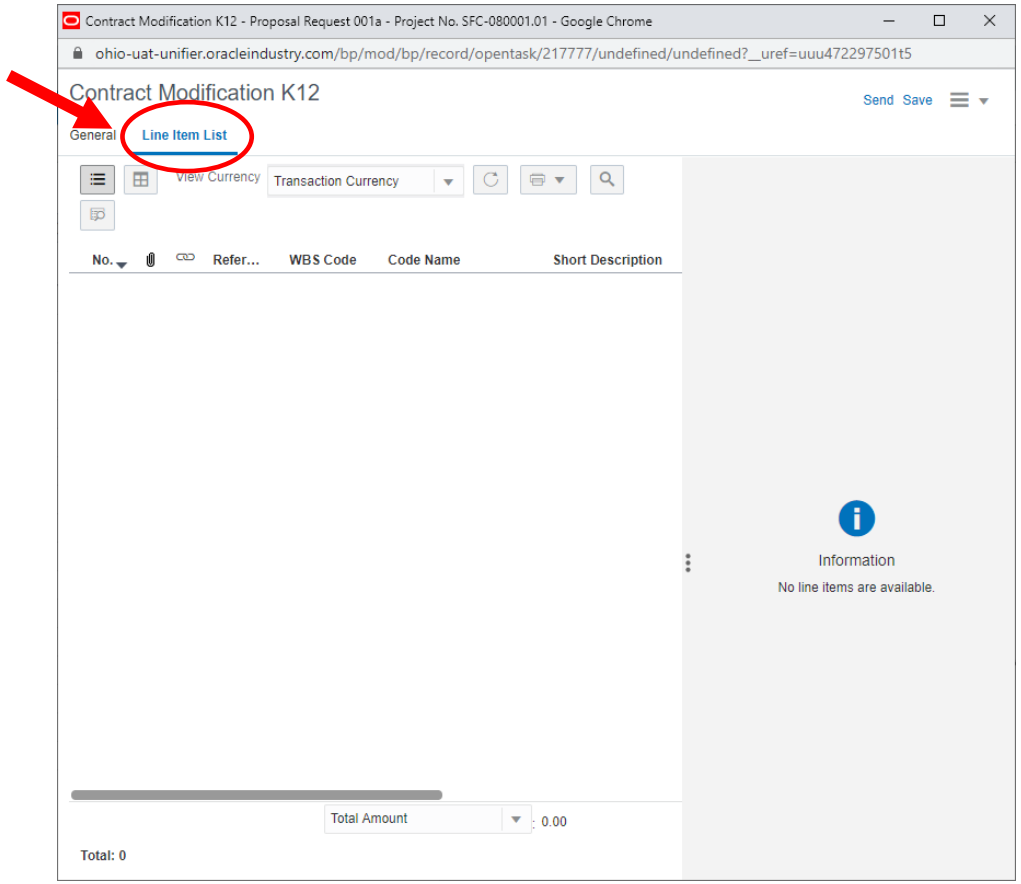
A/E Review

- Review the information in the **General** tab



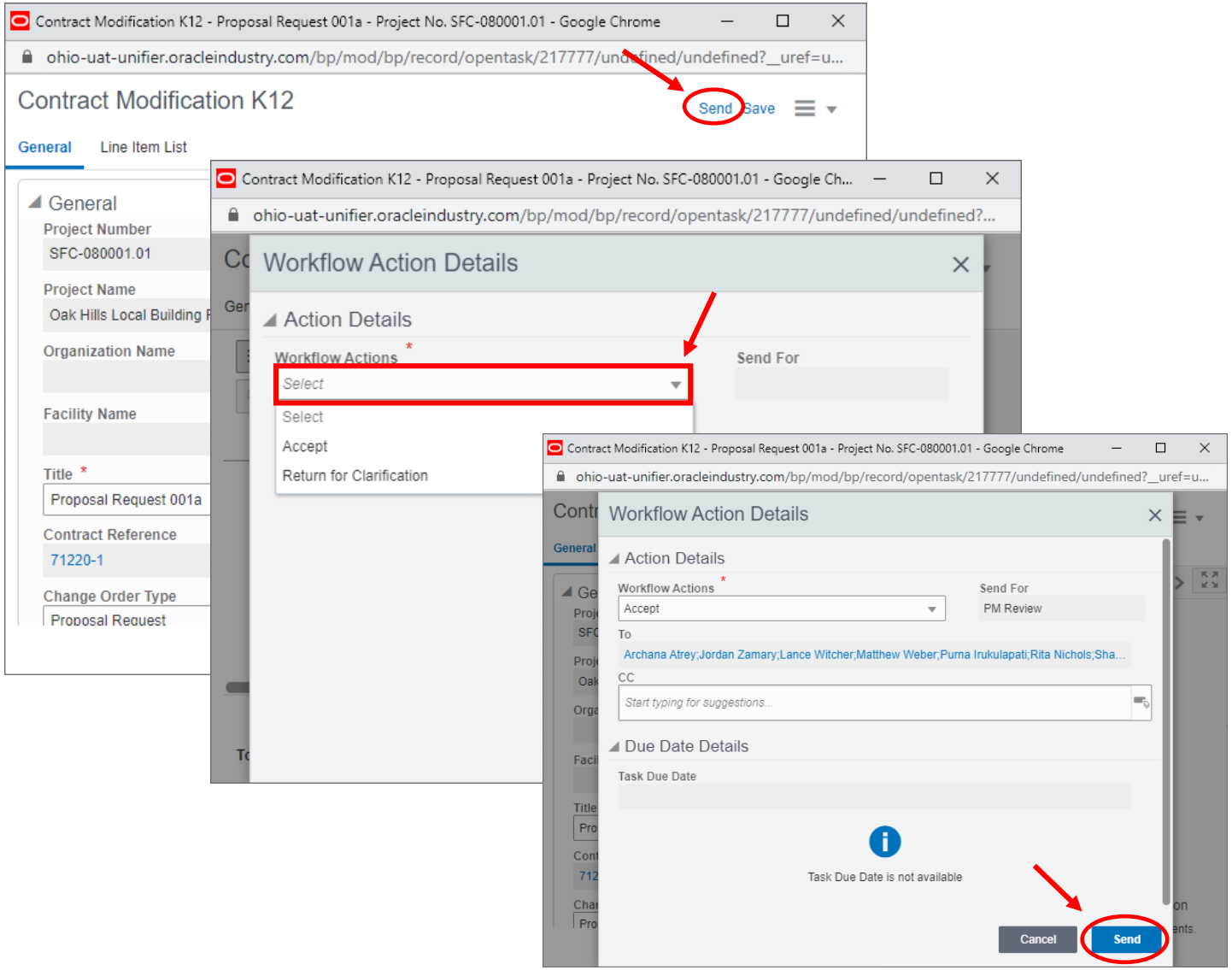
A/E Review

- Click the **Line Item List** tab to review



Send the Record

- Once the review is complete click **Send** at the top of the record
- Choose Workflow Action:
  - **Accept:** send the record to the PM for review
  - **Return for** Clarification: return to the Contractor for changes if necessary
- Click **Send**



Questions?

Please contact OAKS CI Support Desk:

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