

CHANGE ORDER (CO) - VENDOR STEPS

Process Description

Provides for submission, review, and approval of Change Order (CO)

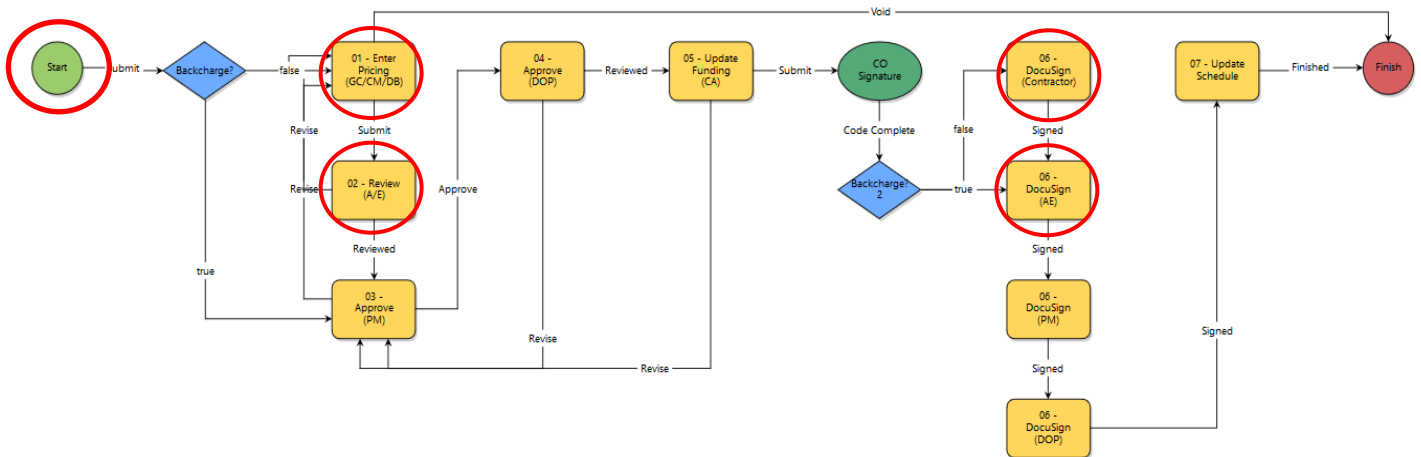
Roles That can Start This Process

Architect/Engineer (AE) or OSU Project Manager (PM)

Process Participants

Construction Manager at Risk (CMR), Design Builder (DB), General Contractor (GC), Criteria AE (CAE), Architect Engineer (AE), OSU Project Manager (PM)

Workflow Diagram



Initiation of Process

1. Initiation of Process – Start Step: Complete the Basis of Change Order and Commitment Change Details section of the Change Order (CO) screen.

Basis of Change Order			
* Type of Change:	-- Please select an option --		
* Description:			
* Justification:			
Required if Multiple GMP's			
GMP Number:			
Commitment Change Details			
* Commitment:	Please select a commitment...	Company:	
Status:	Draft		
* Date Of Change:	05.14.2019	* Reason Code:	Select One...

2. Complete the “Add Additional Scope Item” section using the on-screen instructions

Add Additional Scope Commitment Item

Item Number	001
Account Code	Please Select a Line Item
Commitment Item	
Description	
Funding Rule	Local-Aux SL
Retainage Percent	0.00
Change Amount	0.00
Custom Field(s)	
Equipment Item(s)	

Add

3. When done click the **Submit** button.

Enter Pricing (GC/CM/DB)

1. Open the process. The **Change Order** screen displays.
2. Review the information for the request and enter the commitment change information
 - Note: Using the on-screen instructions, download and complete the template
3. Select **Submit** from the drop-down box and click **Take Action**.

Basis of Change Order

* Cost Basis: Time & Material Not to Exceed
 Allowance (described below)
 Fixed Price
 Unit Price

Description: test
Justification: tst
GMP Number:
Change Order Worksheet Template: [Change Order Worksheet](#)

* Change Order Worksheet: Drag and drop file here or

Change Order Backup Document: Drag and drop file here or

Adjustment to Contract Time

* Days Requested: 0

Commitment Change Details

Commitment:	OSU-000000 test - Architect/Engineer - A/E Test	Company:	A/E Test
Status:	Draft		
Created:	05.15.2019 (Joseph Holliman - SSO)		
* Date Of Change:	05.15.2019	* Reason Code:	<input type="text"/>

Commitment Change Custom Fields

OAKS PO:	<input type="text"/>
Process Type:	CO
Process ID:	1
Integration Hold:	No <input type="button" value="v"/>
Migrated:	No <input type="button" value="v"/>

Review (AE)

1. Open the process. The **Change Order** screen displays.
2. Review and approve the Basis of Change Order and Commitment Change information.
 - Select **Reviewed** from the drop-down box and click the **Take Action** button. The process routes to OSU to take action.
 - If **Revise** is selected, the process allows you to add comments. After the **Take Action** button is clicked, the process delivers these comments to GC/CM/DB for correction.

A screenshot of a web interface showing a dropdown menu with the following options: 'Reviewed', '-- Please select an action --', 'Reviewed', and 'Revise'. The 'Reviewed' option is currently selected. To the right of the dropdown is a button labeled 'Take Action' with an upward-pointing arrow icon below it.

Approve (PM)

This step is performed by OSU.

DocuSign (Contractor)

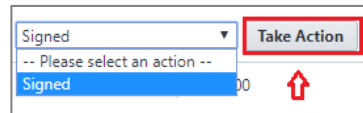
1. Open the process. The **Change Order** screen displays.
2. Review and DocuSign the request.
3. Select **Signed** from the drop-down box and click the **Take Action** button.

A screenshot of a web interface showing a dropdown menu with the following options: 'Signed', '-- Please select an action --', and 'Signed'. The 'Signed' option is currently selected. To the right of the dropdown is a button labeled 'Take Action' with an upward-pointing arrow icon below it.

DocuSign (AE)

1. Open the process. The **Change Order** screen displays.

2. Review and DocuSign the request.
3. Select **Signed** from the drop-down box and click the **Take Action** button.



The screenshot shows a web interface element. On the left is a dropdown menu with a blue border. The top item is 'Signed'. Below it is a greyed-out option '-- Please select an action --'. The 'Signed' option is currently selected and highlighted in blue. To the right of the dropdown is a red-bordered button labeled 'Take Action'. Below the button is a red upward-pointing arrow icon.

DocuSign (PM) (DOP)

These steps are performed by OSU.

Finish

The Change Order process is complete. The schedule is updated. A notification is sent when the DOP approves the Change Order (CO).