# **SOV UPDATE: VENDOR**

# **Process Description**

Provides for submission, review, and approval of the SOV for Construction or Professional Service contracts. The SOV submitted an approved becomes the basis for pay requests.

# **Roles That can Start the Process**

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

#### **Process Participants**

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

#### Workflow Diagram



## **Initiation of Process**

- The CA initiates the process for the initial SOV when the contract is executed. This process must be initiated to approve any changes to the SOV prior to invoicing for them on the pay app.
- 1. Open the Schedule of Values Update (SOV) process. The **Schedule of Values Update** screen displays
- 2. Indicate of AE Review is required
  - Note: This process is used for Professional Service and Construction pay apps. If the SOV is for a professional service contract, select *No.*
  - Note: Be sure to adhere to all embedded help text

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Schedule of Values Update (SOV)							
Start Process	Print Check Spelling Submit	Save Draft Cancel					
Project:	eBuilder Training						
Project Number:	OSU-000000						
Process:	Schedule of Values Update						
Details Attached Documents (0)	Attached Processes (0) Attached Forms (0) Attached Viewpoints (0)						
* AE Review Required?:	● Yes ◯ No						

- 3. Enter required Commitment Change Details
  - Select a *Commitment, Date of Change*, and *Reason Code* ("SOV Update (Original)" or "Amendment (Changes)"
  - Follow the on-screen instructions
- 4. Click the **Submit** button

# Vendor Input

- 1. Open the process. The **Schedule of Values Update (SOV) 1** screen diplays
- 2. Attach EDGE documentation for items not previously submitted (ex. additional work, change in subcontractors, etc)

Additional Documents								
Attach documents for any new or changed EDGE vendors only								
EDGE Affidavit Document:	Drag and drop file here or Browse Computer Browse	e e-Builder						
EDGE Certification Document:	Drag and drop file here or Browse Computer Browse	e e-Builder						

3. Follow the on-screen instructions to complete the SOV

Commitment Change Items Group By			Download Schedu	Download Schedule of Values Template Import Schedule of		of Values Add All Existing Items Add E		d Existing Item		
	#	Commitment Item	Description	Budget Line Item	Retainage Percent	Current Commitment Amount	Change Amount	Net Commitment Amount		
Delete	001	001	Construction	02-0210	0.00	20,000.00	0.00 🖉	20,000.00		
< >>										
	Total					20,000.00	0.00	20,000.00		

- 1. Click Download Schedule of Values Template
- 2. Click on the cell in the *Account Code* column to select a code- copy account code (column A) and funding rule to all new line items
- 3. Enter a **Description** of the item (will autopopulate based on selected CSI code, or you can make your own)
- 4. Current SOV amount (\$0 for new lines)
- 5. Change amount (for this line)
- 6. *Location* (ex: if you are dividing the SOV by Building or floors)

- 7. Select CSI Division and CSI Detail L2 and L4
  - Note: Professional Service SOVs use CSI divison "99"
- 8. Select a *Type* Labor or Materials (the Retainage column will automatically populate based on the selection)
- 9. EDGE Vendor? Indicate if the line will be performed by an EDGE vendor
  - Note: If you have one labor item and only a portion will be supplied by an EDGE Vendor, you must split the line accordingly. If EDGE is claimed on a line, the entire amount of that line must be performed by the EDGE vendor indicated.
- 10. EDGE Vendor Name Enter the Vendor Name
- 11. *EDGE Amount* Enter the EDGE amount (should agree with line amount)

# Additional Process Step

SOV Review (PM) – Performed by OSU

#### **SOV Review AE**

- 1. Open the process
- 2. Review the SOV
- 3. From the dropdown box select *Approve* or *Revise*. If Revise is selected the process is send back to the contractor.
- 4. Click the *Take Action* button

## **Additional Process Step**

Approval (CA) – Performed by OSU

#### Finish

The process is complete. The vendor may now submit a pay app.