

Change Orders – CM Firm Responsible - Training Guide Date Created: 7/7/2021 Date Updated: 4/19/2023

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About

A Change Order adds positive or negative cost items to Expense Contracts and/or extend time. Amendments process Change Orders for financial encumbrance. For Mentor Contracts, Construction Management work is also approved and encumbered. All cost lines are grouped by LLW and copied to Master Contract Authorizations.

Notes

The Change Order process can be initiated by either the CM Firm (Contractor proposals under \$25K) or the COU Lead Estimator (Contractor proposals greater than \$25K). This guide provides the step-by-step instructions for when the CM Firm is responsible. Please see the separate guide for when the COU is responsible.

Process Overview

First, the CM Firm creates and submits the Change Order, which is DocuSign approved by the GC, CM PM, and SPO. Next, the CM Firm compiles the package for COU Director review followed by an approval process based on the dollar amount. Upon approval, the Operations Manager reviews and PIN signs the Amendment, which is sent to Finance for encumbrance. Once the Amendment is encumbered, the Change Order is approved for Pay Requests.

Workflow Diagram







No

Yes

No

Yes



Step-by-Step Instructions

Create Change Order				
Role		Preceding Steps		Outcome
CM Firm	\rightarrow	Change Issue process is complete.	\rightarrow	A Change Order is created.

Steps

1. Go to 'Project Finder' > Select Mentor Partition

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3. Go to 'Apps' > Select 'Issues' App

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4. Select the issue and Click Initiate Change Order button



6. Fill out Scope of Work and any other required fields, then Click Save/Close

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Update Change Order

Role	Preceding Steps		Outcome
CM Firm	Existing Change Order has been created.	\rightarrow	The Change Order is updated.

Steps

1. Select 'Change Orders' tab > Select Change Order requiring update > Click 'Edit'

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2. Update Required Fields > Click 'Save/Close'

Submit Change Order for Signature

Role	Preceding Steps	_	Outcome
CM Firm	 Existing Change Order has been created. 	\rightarrow	The Change Order is submitted to GC for DocuSign signature.

Steps

1. Select 'Change Orders' tab > Select Change Order requiring submission > Click 'Submit for Signature

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Review and DocuSign Change Order – "TO" Contact in the Contract

Role		Preceding Steps		Outcome
"TO" Contact in Contract	\rightarrow	Email with DocuSign link received.	\rightarrow	The Change Order is DocuSign approved by the GC. The Change Order is submitted to CM Firm for Compiling package

Steps

1. Go to email account (external) > Select email

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2. Click 'Review Document' button in email > Check 'I agree to use electronic records and signatures' box (only if first time using DocuSign) > Click 'Continue' button

Please Review & Act on	These Documents			DocuSign
External REQMT-CM1 SCA Sandbox (Development-DEVW	/EEKLY-6/1/2021 2:13:35 AM)			
Please review the Change Order 00002 and	render your decision.			
				2
Please read the Electronic Record	and Signature Disclosure 1 ds and signatures.		CONTINUE	OTHER ACTIONS -
	Decartment of Education Authority			
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DS Initial	ATTN: External REQMT-CM1-PM		-	
9 Stamp	Add swings to playaround			
	Total: \$2,500.00	Increase: 0 Calendar Days		
Date Signed	The Contractor agrees to perform or omit we	rk as described in this Change Order, for the amount as		
	within the contract scheduled completion time	e period as adjusted above. In accepting and executing the	is	

3. Click 'Signature' button > Drag Signature in 'Contractor Signature' box > Click 'Date Signed' button > Drag Date in 'Date:' box > Click Finish

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K bo bo b	Name First Name Last Name Email Address	L	Contractor Signature:			Date: Date:	4		
	Company Title	-	SCA Authorized Signature:			Date:			

Role		Preceding Steps		Outcome
CM Firm	\rightarrow	The Change Order is DocuSigned by GC	\rightarrow	Change Order Package is compiled. The Change Order is submitted to CM PM to DocuSign.

Steps

1. Go to Linked Issue

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2. Click Edit button and go to References section, click add approval doc

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3. Select the documents to be included in the Change Orde Package, use the arrow button on the right to move the order of documents and make sure the change order docusigned by GC is on the first page. Enter the Filename and then click OK. Click Save/Close.

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4. Click Copy Approval Doc to Linked CO

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5. Go back to the change order app. Select the Change order and Click Submit for Signature button

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Role		Preceding Steps		Outcome
СМ РМ	\rightarrow	Email with DocuSign link received.	\rightarrow	The Change Order is DocuSign approved by CM PM. The Change Order is submitted to SPO to DocuSign approve.

*See screenshots from "Review and DocuSign Change Order > General Contractor for the four steps below"

Steps

- 1. Go to email account (external) > Select email
- 2. Click 'Review Document' button in email
- 3. Click 'Continue' button
- 4. Click 'Start' button > Click 'Sign' button > Click 'Finish' button

Review and DocuSign Change Order – SPO

Role	Preceding Steps	Outcome
SPO	Email with DocuSign link received, and Existing Change Order has been created. Change Order type is not ending with W.	 The Change Order is DocuSign approved by SPO. Ready for CM Firm to Update Change Order package.

*See screenshots from "Review and DocuSign Change Order > General Contractor"

Steps

- 1. Go to email account (external) > Select email
- 2. Click 'Review Document' button in email
- 3. Click 'Continue' button
- 4. Click 'Start' button > Click 'Sign' button > Click 'Finish' button

Update Change Order Package

Role	Preceding Ste	eps	Outcome
	Change Orde	^r DocuSign	Change Order Package is
CM Firm	\longrightarrow approved by	GC, CM PM and \longrightarrow	submitted for COU Manager
	SPO.		review and PIN code signature.

Steps

- 1. Go to linked issue, click the Edit button, scroll down to References Section following the steps in compile package step
- 2. Select the approval document, click the three dots and click Edit button

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3. Unselect the old DocuSigned document with GC signature and the other documents. Select the new DocuSigned document with all parties signature using left side checkboxes. Then click ok. Click Save/Close.



4. Click Copy Approval Doc to Linked CO

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5. Go to change order and Click 'Submit for Approval'



COU Senior Director Review and Pin Code Sign

Role		Preceding Steps		Outcome
COU Senior Director	\rightarrow	Change Order Approval Doc is updated by CM Firm.	\rightarrow	 COU Senior Director review and PIN sign is completed. Change Order is routed to next user in workflow based on dollar amount: Less than absolute value of \$25K - Operations Manager. Greater than absolute value of \$25K and less than or equal to absolute value of \$100K - CPO. Greater than absolute value of \$100K - VP.

Steps

1. Go to 'Tasks' > Select task > Click 'Approve' > Enter PIN > Click 'Continue'



Operations Manager Review AMD and Pin Code Sign

Role	Preceding Steps	Outcome
Operations Manager	The Change Order Package has been reviewed by the COU Senior Director and the Change Order is less than absolute value of \$25K. OR The Change Order has been reviewed by the COU Senior Director and the Change Order has been DocuSign by the Approver based on dollar amount	Change Order Amendment is reviewed by Operations Manager. Change Order is sent for encumbrance in Oracle. Once encumbered, the Change Order is complete, and the Contractor can request payment.

*See screenshots in "Review and Pin Code Sign Change Order Package – COU Senior Director" Steps

- 1. Go to 'Tasks' and
- 2. Select the Task
- 3. Click 'Approve' button
- 4. Enter PIN and click 'Continue'

Approve and DocuSign Package – CPO

Role	Preceding Steps	Outcome
сро —	The Change Order has been reviewed by the COU Senior Director The Change Order is > absolute value of \$25k and <= absolute value of \$100k.	Change Order is approved by CPO. Change Order is sent to Operations Manager

*See screenshots in "Review and DocuSign Change Order > General Contractor"

Steps

- 1. Go to email account (external) > Select email
- 2. Click 'Review Document' button in email
- 3. Click 'Continue' button
- 4. Click 'Start' button > Click 'Sign' button > Click 'Finish' button

Role	Preceding Steps	Outcome
Vice President	The Change Order has bee reviewed by the COU Seni Director. The Change Order is > abs value of \$100K and <= abs value of \$250K.	en or or olute olute Change Order is approved by VP. Change Order is sent to Operations Manager.

*See screenshots in "Review and DocuSign Change Order > General Contractor"

Steps

- 1. Go to email account (external) > Select email
- 2. Click 'Review Document' button in email
- 3. Click 'Continue' button
- 4. Click 'Start' button > Click 'Sign' button > Click 'Finish' button

Vice President Review and Pin Code Sign

Role		Preceding Steps		Outcome
Vice President	\rightarrow	The Change Order has been reviewed by the COU Senior Director. The Change Order is greater than absolute value of \$250K.	\rightarrow	VP reviewed by PIN code signing the approval. Change Order is sent to President for DocuSign approval.

*See screenshots in "Review and Pin Code Sign Change Order Package – COU Senior Director"

Steps

- 1. Go to 'Tasks' and
- 2. Select the Task
- 3. Click 'Approve' button
- 4. Enter PIN and click 'Continue'

Approve and DocuSign Package – President

Role	Preceding Steps		Outcome
President	The Change Order is greater than absolute value of \$250K.	\rightarrow	President review and sign off is completed. Change Order is sent for Operations Manager.

*See screenshots in "Review and DocuSign Change Order > General Contractor"

Steps

- 1. Go to email account (external) > Select email
- 2. Click 'Review Document' button in email
- 3. Click 'Continue' button
- 4. Click 'Start' button > Click 'Sign' button > Click 'Finish' button