

Expense Contract Training Guide (JOC & Emergency)

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About

For Construction work, Expense Contracts are agreements between SCA and the GC. In Management contracts, the Expense Contract is between the CM Firm and itself. For self-performed JOC and Emergency Construction and Management, Expense Contracts contain SCA authorized work. A Request for Work Authorization processes Expense Contract cost items for approval and converts to a Work Authorization during the workflow. All cost lines are grouped by Work Type and LLW and copied into Master Contract Authorizations.

Workflow Diagrams

Summary Workflow



JOC/Emergency Construction Contract Workflow



JOC Management Contract Workflow



Emergency Management Contract Workflow



JOC/Emergency AOS and Services Contract Workflow



Process Overview

JOC/Emergency Construction Contract

The CM Firm enters the Expense Contract information, creates the approval document (including the Request for Work Authorization and backup documentation), and submits for approval. The individuals who need to PIN sign the request differs based on the dollar value of the submitted contract.

CM Project Manager \longrightarrow SPO \longrightarrow CPO (dollar value > \$25K) \longrightarrow VP (dollar value > \$100K)

Afterwards, the CM Project Manager and Contractor will need to DocuSign approve the Request for Work Authorization.

Next, the Operations Manager reviews and PIN code signs the Work Authorization. The System will conduct a RESOA budget check for LLWs flagged with RESOA funding. If RESOA Funds are available, the request is sent to Finance for encumbrance. Once funds are encumbered, the Expense and Master Contracts are available for payment.

In an On Call (Limited Bid) Emergency Expense Contract, the SOV distribution will need to be updated after the Work Authorization has been encumbered. This distribution will be approved by the CM Firm and the SPO.

JOC Management Contract

The following process applies for non-AOS JOC Management Contracts. The CM Firm Admin enters the Expense Contract with backup documentation and submits for review. The individuals who need to PIN sign the request differs based on the dollar value of the submitted contract.

CM Program Manager \longrightarrow SPO \longrightarrow CPO (dollar value > \$25K) \longrightarrow VP (dollar value > \$100K)

Once the review is complete, the Work Authorization request is submitted to the following actors for DocuSign approval.

CM Program Manager \longrightarrow SPO \longrightarrow CPO (dollar value > \$25K) \longrightarrow VP (dollar value > \$100K)

Next, the Operations Manager reviews and PIN code signs the Work Authorization. The System will conduct a RESOA budget check for LLWs flagged with RESOA funding. If RESOA Funds are available, the request is sent to Finance for encumbrance. Once funds are encumbered, the Expense and Master Contracts are available for payment.

Emergency Management Contract

The CM Firm enters the Expense Contract information, creates the approval document (including the Request for Work Authorization and backup documentation), and submits for approval. The individuals who need to PIN sign the request differs based on the dollar value of the submitted contract.

CM Project Manager \longrightarrow SPO \longrightarrow CPO (dollar value > \$25K) \longrightarrow VP (dollar value > \$100K)

Afterwards, the CM Project Manager and Contractor will need to DocuSign approve the Request for Work Authorization. Next, the Operations Manager reviews and PIN code signs the Work Authorization. The System will conduct a RESOA budget check for LLWs flagged with RESOA funding. If RESOA Funds are available, the request is sent to Finance for encumbrance. Once funds are encumbered, the Expense and Master Contracts are available for payment.

JOC/Emergency AOS or Services Contract

The CM Firm Admin enters and submits the AOS or Services Expense Contract information. The CM Program Manager and Program CPO PIN sign the Request for Work Authorization.

Next, the Operations Manager reviews and PIN code signs the Work Authorization. The System will conduct a RESOA budget check for LLWs flagged with RESOA funding. If RESOA Funds are available, the request is sent to Finance for encumbrance. Once funds are encumbered, the Expense and Master Contracts are available for payment.

JOC/Emergency Construction Contract

Create Construction Contract with Backup Documentation

Role		Preceding Steps		Outcome
CM Firm	\rightarrow	Contract information is known. Work Breakdown is entered at Program and Subproject level.	\rightarrow	The Expense Contract is created.

Steps

1. Go to 'Project Finder' > Navigate to desired partition > Select desired Subproject

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``		→ C000015251-JC0002 K460 CTF Room Conversion ☆ 🖍	
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2. Go to 'Apps' > Select 'Expenses' App

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3. Select the 'Expense Contract' tab > Click 'New' > Enter required fields including the Details, Parties, Dates, and Items

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4. In the references section, select 'Upload' > Select the backup documentation to upload > Select '...' > Select 'Add Approval Doc'

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5. Select the documents that will be sent to be signed using the checkboxes > Enter a filename > Click 'Ok'

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6. Select 'Save / Close'

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Steps for Adding Multiple Contractors to a Contract (Temporary)

These steps allow you to track multiple contractors in CAMP (temporary solution). This applies to any Emergency project where the CM is contracting directly with the contractor(s) (first-level contracts only, subcontractor info is not required). It does not apply to when the CM is managing work for an SCA contractor (e.g., Security and Sidewalk Bridge).

- 1. Go to Apps> **Project Directory**.
- 2. Select the Companies tab.
- 3. Click New. Add all contractors (and also your own company) in each project:

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- 4. Go to Apps> Expenses> Contracts.
- 5. Create one line per LLW Contractor combination. Enter Contractor name in the line-item description. **Example**: Showing one LLW and two Contractors:

✓ ITEMS	5									
Status	Status Draft I Items Include Quantity									
Insert	1	item(s								
			COST CODE	DESC	CSI CODE	STATUS	TOTAL			
	Ø	01	* 2112-125902-3A1 X142 FY21 RESO A TECHNOLOGY UPGRADE ⊗ 🦂	*Emergency Work Description (Contractor 1)	•	Draft	\$ 75.00			
	Ø	02	* 2112-125902-3A1 X142 FY21 RESO A TECHNOLOGY UPGRADE 🔕 🗣	*Emergency Work Description (Contractor 2)	•	Draft	\$ 25.00			

- 6. Apps> Expenses> Additional Work: Same as Expense Contracts above
- 7. Apps> Expenses> **Pay Requests**: SOV Line Items will be created automatically based on Contract and Additional Work items. Enter requested pay amounts by Contractor:

✓ ITEM	S						
Status Open							
		Source Number	Cost Code 🛛 🔻	DESCRIPTION	SCHEDULED VALUE	PREVIOUS WORK COMPLETED	WORK COMPLETED THIS PERIOD
	Ø	01	2112-125902-3A1	Emergency Work Description (Contractor 1)	\$75.00	\$0.00	\$
	Ø	02	2112-125902-3A1	Emergency Work Description (Contractor 2)	\$25.00	\$0.00	\$

Submit for Approval

Role		Preceding Steps		Outcome
CM Firm	\rightarrow	Existing Expense Contract is available.	\rightarrow	Work Authorization request is sent to SCA PO or CM Project Manager for PIN approval.

Step

Select the expense contract > Click 'Submit for Approval'

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PIN Sign Work Authorization Request – SCA PO/CM Project Manager

Role	Preceding Steps	Outcome
PO	Work Authorization request has been submitted. The subproject has a Project Officer in the roster.	→ Work Authorization request is
CM Project Manager	Work Authorization request has been submitted. The subproject has a CM Project Manager in the roster.	sent to SPO for PIN approval. →

Step

Go to 'Tasks' > Click the PIN sign task > Click 'Approve' button > Enter Pin Code > Click 'Continue'



PIN Sign Work Authorization Request – SPO, CPO, VP



Step

Go to 'Tasks' > Click the PIN sign task > Click 'Approve' button > Enter Pin Code > Click 'Continue'

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DocuSign Work Authorization Request – SCA PO/CM Project Manager

Role		Preceding Steps		Outcome
SCA PO	\rightarrow	The Work Authorization request has been PIN signed. The subproject has a Project Officer in the roster.	\rightarrow	Work Authorization request is
CM Project Manager	\rightarrow	The Work Authorization request has been PIN signed. The subproject has a CM Project Manager in the roster.	\rightarrow	sent to Contractor for DocuSign signature.

Steps

1. Go to email account > Select email > Click 'Review Document' button in email

DocuSign

Thomas Everritt sent you a documer	nt to review and sign.
	NT

- 2. Click 'Continue' button. Note. For First Time using DocuSign:
 - a. Check 'I agree to use electronic records and signatures' box
 - b. Select desired signature details
 - c. Click the 'Adopt and Sign' button
- 3. Select the DocuSign signature buttons on top left > Sign and date the document > Select 'Finish'

	ument	FINISH	OTHER ACTIONS -	
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DocuSign Work Authorization Request – Contractor

Role		Preceding Steps		Outcome
		Work Authorization request is	_	Work Authorization is sent to
GC	\rightarrow	DocuSign approved by the	\rightarrow	the Operations Manager to be
		PO/CM Project Manager.		PIN signed.

Steps

1. Go to email account > Select email > Click 'Review Document' button in email

DocuSign



- 2. Click 'Continue' button. Note. For First Time using DocuSign:
 - a. Check 'I agree to use electronic records and signatures' box
 - b. Select desired signature details
 - c. Click the 'Adopt and Sign' button
- 3. Select the DocuSign signature buttons on top left > Sign and date the document > Select 'Finish'

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Review and PIN Sign Work Authorization

Role	Preceding Steps	_	Outcome
Operations Manager —	 Contract is DocuSign approved by the contractor. 	\rightarrow	Work Authorization is sent to Finance to be encumbered.

Step

Go to 'Tasks' > Click the 'Operations Manager Signature Task' > Select 'Approve' > Enter PIN > Click 'Continue'

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Emergency Construction On Call (Limited Bid) Contract

In the case of an On Call (Limited Bid) construction contract, the SOV distribution needs to be updated after encumbrance in Oracle. The following steps will occur after the steps described in JOC/Emergency Construction Contract and the Work Authorization is encumbered in Oracle.

Edit SOV Distribution –	CM Firm		
Role		Preceding Steps	 Outcome
	、	Work Authorization has been	 The SOV distribution is
Civi Fillin, SCA PU	\rightarrow	encumbered by Finance.	 updated and sent for PIN sign.

Steps

1. In the 'Expenses' app, select desired expense contract > Click 'Edit'

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2. Click 'Insert' under Items Section to add new rows > Modify the total value for each row > Select 'Save/Close'

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3. Select 'Submit'

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PIN Code Sign SOV Distribution – CM Project Manager, SPO

Role		Preceding Steps		Outcome
Order: CM Project Manager > SPO	\rightarrow	CM Firm updated the SOV distribution and allocated funding.	\rightarrow	The SOV distribution is approved.

Step

Select 'Tasks' > Select SOV regarding task > Select 'Approve' > Type PIN > Click 'Continue'

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JOC Management Contract

Create JOC Management Contract with Backup Documentation

Role	Pre	ceding Steps		Outcome
CM Firm	→ Exp is kr Wor Prov	ense Contract information nown. rk Breakdown is entered at gram and Subproject level.	\rightarrow	The Expense Contract is created.

Steps

1. Go to 'Project Finder' > Select desired Subproject

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2. Go to 'Apps' > Select 'Expenses' App

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3. Select the 'Expense Contract' tab > Click 'New' > Enter required fields including cost items and dates

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4. In the references section, select 'Upload' > Select the backup documentation to upload

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5. Select '...' > Select 'Add Approval Doc'

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6. Select the documents that will be sent to be signed using the checkboxes > Enter a filename > Click 'Ok' > Click 'Save/Close'

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Submit for Approval

Role		Preceding Steps		Outcome
CM Firm	\rightarrow	Existing Expense Contract is available.	\rightarrow	A Work Authorization request is sent to CM Program Manager to be signed.

Step

Select the expense contract > Click 'Submit for Approval' S Expenses Stolar – 🗗 🗙 Contracts Additional Work Pay Requests 🗉 🖻 < NEW MORE 🗸 SEND EDIT PROCESS VIEW V DELETE HISTORY GOURL Project Finder G Contract - JC0004 Preview 🔲 🖸 🗙 Q Default ~ O Total \$50,000.00 > SECTIONS Apps 🗆 🗸 Number To Company Title Workflow Status Item Total Current Contract Amount Refer ✓ DETAILS JC0004 SCA GC 1 K004 New School Active DETAILS \$50.000.00 \$0.00 Reporting PARTIES Master Contract C000015251 SCA Sandbox SCOPE JC0004 7/12/2022 Number Q Search DATES & WORKFLOW Date Title K004 New School ITEMS 🖆 Tasks MARKUPS ✓ PARTIES SIGNATURES Messages From Contact Ryan SCA Vice President - SCA Sandbox From Company SCA Sandbox From Company Office Primary Office COMMENTS H Work Breakdown REFERENCES INTEGRATION From Company Address 30-30 Thompson Ave Queens, NY 12345 S Expenses To Contact Indigo External EXT-GC-1 - SCA GC 1 To Company SCA GC 1 () Getting Started To Company Office Primary Office To Company Address 100 New Street New York, NY 12345 ✓ SCOPE Total Expense Contract Value \$50,000.00 Liquidated Damages Per Calendar Day Scope of Work Addenda Submit Complete And Approve All + Add Person 1 Item(s) You last logged in yesterday at 9:17 AM Eastern Time (US & Canada) ≡ ∎ ≘ 1.9.33.88 - DEVWEEKLY 🖾 🞄 kahua

PIN Sign Work Authorization Request – CM Program Manager

Role		Preceding Steps		Outcome
CM Program Manager	\rightarrow	Work Authorization request has been submitted.	\rightarrow	Work Authorization request is sent to SPO for review and PIN approve. The CPO and VP may need to sign depending on the contract's value

Steps

1. Go to 'Tasks' > Click the PIN sign task > Click 'Approve' button > Enter PIN > Click 'Continue'

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PIN Sign Work Authorization Request – SPO, CPO, VP

Role		Preceding Steps		Outcome
Order: SPO > CPO > VP			_	
CPO only signs if amount is greater than \$25K.	\rightarrow	Work Authorization has been reviewed and PIN approved by CM PM.	\rightarrow	Work Authorization request has been reviewed and approved by the SPO, CPO, VP.
VP only signs if amount is greater than \$100K.				

Steps

1. Go to 'Tasks' > Click the PIN sign task > Click 'Approve' button > Enter PIN > Click 'Continue'



Submit for DocuSign

Role		Preceding Steps		Outcome
CM Firm	\rightarrow	Existing Work Authorization Request has been reviewed and PIN approved by SPO CPO and VP	\rightarrow	The Work Authorization request is submitted for DocuSign.

Step

Go to 'Expenses' app > Select desired Expense Contract > Click 'Submit for DocuSign' button.

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DocuSign Work Authorization – CM Program Manager

Role	Preceding Steps	_	Outcome
СМ РМ —	 Work Authorization Request is submitted for DocuSign by CM Firm 	\rightarrow	Work Authorization request is sent to SPO for DocuSign signature. The CPO and VP may need to sign depending on the contract's value.

Steps

1. Go to email account > Select email > Click 'Review Document' button in email

DocuSign



- 2. Click 'Continue' button. Note. For First Time using DocuSign:
 - a. Check 'I agree to use electronic records and signatures' box
 - b. Select desired signature details
 - c. Click the 'Adopt and Sign' button
- 3. Use the DocuSign signature buttons at the top left to sign the document.

DocuSign Work Authorization – SPO, CPO, VP



Steps

1. Go to email account > Select email > Click 'Review Document' button in email

DocuSign



- 2. Click 'Continue' button. Note. For First Time using DocuSign:
 - a. Check 'I agree to use electronic records and signatures' box
 - b. Select desired signature details
 - c. Click 'Adopt and Sign' button
- 3. Use the DocuSign signature buttons at the top left to sign the document.

Review and PIN Sign Work Authorization

Role		Preceding Steps		Outcome
		Work Authorization is	_	Work Authorization is sent to
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Operations Manager	\rightarrow	SPO. The CPO and VP may	\rightarrow	Oracle. After encumbrance,
		have also approved the Work		change orders and pay
		Authorization.		requests can be made.

Steps

1. Go to 'Tasks' > Click 'Operations Manager Signature Task' > Select 'Approve' > Enter PIN code > Click 'Continue'



Emergency Management Contract

Create Management Con	tract	
Role	Preceding Steps	Outcome
CM Firm	Expense Contract information is known. Work Breakdown is entered at Program and Subproject level.	→ The Expense Contract is created.

Steps

1. Go to 'Project Finder' > Select desired Subproject

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2. Go to 'Apps' > Select 'Expenses' App

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3. Select the 'Expense Contract' tab > Click 'New' > Enter required fields including cost Items

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4. In the references section, select 'Upload' > Select the backup documentation to upload

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5. Select '...' > Select 'Add Approval Doc'

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6. Select the documents that will be sent to be signed using the checkboxes > Enter a filename > Click 'Ok' > Click 'Save/Close'

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Submit for Approval				
Role		Preceding Steps		Outcome
CM Firm	\rightarrow	Existing Expense Contract is available.	\rightarrow	A Work Authorization request is sent to CM Program Manager to be signed.

Step

1. Select the expense contract > Click 'Submit for Approval'



DocuSign Work Authorization Request – CM Program Manager

Role	Preceding Steps	Outcome
CM Program Manager	Work Authorization request	 Work Authorization request is sent to SPO for review and approval. The CPO and VP may need to sign depending on the contract's value.

Steps

1. Go to email account > Select email > Click 'Review Document' button in email

DocuSign



- 2. Click 'Continue' button. Note. For First Time using DocuSign:
 - a. Check 'I agree to use electronic records and signatures' box
 - b. Select desired signature details
 - c. Click the 'Adopt and Sign' button
- 3. Use the DocuSign signature buttons at the top left to sign the document.

DocuSign Work Authorization Request – SPO, CPO, VP



Steps

1. Go to email account > Select email > Click 'Review Document' button in email

DocuSign

Thomas Everritt	sent you a document to re	eview and sign.
1	REVIEW DOCUMENT	

- 2. Click 'Continue' button. Note. For First Time using DocuSign:
 - a. Check 'I agree to use electronic records and signatures' box
 - b. Select desired signature details
 - c. Click the 'Adopt and Sign' button
- 3. Use the DocuSign signature buttons at the top left to sign the document.

Review and PIN Sign Work Authorization

Role		Preceding Steps		Outcome
		Work Authorization is	_	Work Authorization is sent to
		DocuSign approved by the		Finance to be encumbered in
Operations Manager	\rightarrow	SPO. The CPO and VP may have also approved the Work Authorization	\rightarrow	Oracle. After encumbrance, change orders and pay requests can be made

Step

Go to 'Tasks' > Click 'Operations Manager Signature Task' > Click 'Approve' > Enter PIN code > Click 'Continue'



JOC/Emergency AOS and Services Contract

Create AOS or Services Contract

Role		Preceding Steps		Outcome	
CM Firm	\rightarrow	Contract information is known. Work Breakdown is entered at Program and Subproject level.	\rightarrow	The Expense Contract is created.	

Steps

1. Go to 'Project Finder' > Navigate to desired partition > Select desired Subproject/Project

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2. Go to 'Apps' > Select 'Expenses' App

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3. Select the 'Expense Contract' tab > Click 'New' > Enter required fields including the Details, Parties, Dates, and Items

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4. In the References section, use the 'Upload' button to add backup documents > Select '...' > Select 'Add Approval Doc'

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5. Select 'Request for Work Authorization' and backup documents using the checkboxes > Enter a filename > Click 'Ok'

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6. Select 'Save/Close'

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Submit for Approval

Role		Preceding Steps	_	Outcome
CM Firm	\rightarrow	Existing Expense Contract is available.	\rightarrow	The contract is sent to the PO or the CM Project Manager to be signed.

Step

Select the expense contract > Click 'Submit for Approval'

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Review and PIN Approve – CM Program Manager, CPO

Role		Preceding Steps		Outcome
Order: CM Program Manager > CPO	\rightarrow	Request for Work Authorization has been submitted.	\rightarrow	The Work Authorization is sent to the Operations Manager for approval.

Steps

1. Go to 'Tasks' > Click 'Work Authorization Request' subject > Click 'Approve' button > Enter PIN > Click 'Continue'

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Review and PIN Sign – Operations Manager

Role		Preceding Steps		Outcome
Operations Manager	\rightarrow	CPO Reviewed and PIN signed Expense Contract	\rightarrow	Contract is sent to Finance to be encumbered. After encumbrance, change orders and pay requests can be made.

Steps

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Go to 'Tasks' > Click 'Review Work Authorization' subject > Select 'Approve' > Enter PIN > Click 'Continue'