



MINNESOTA STATE



Minnesota State Colleges and Universities

Change Order (CO2) Process

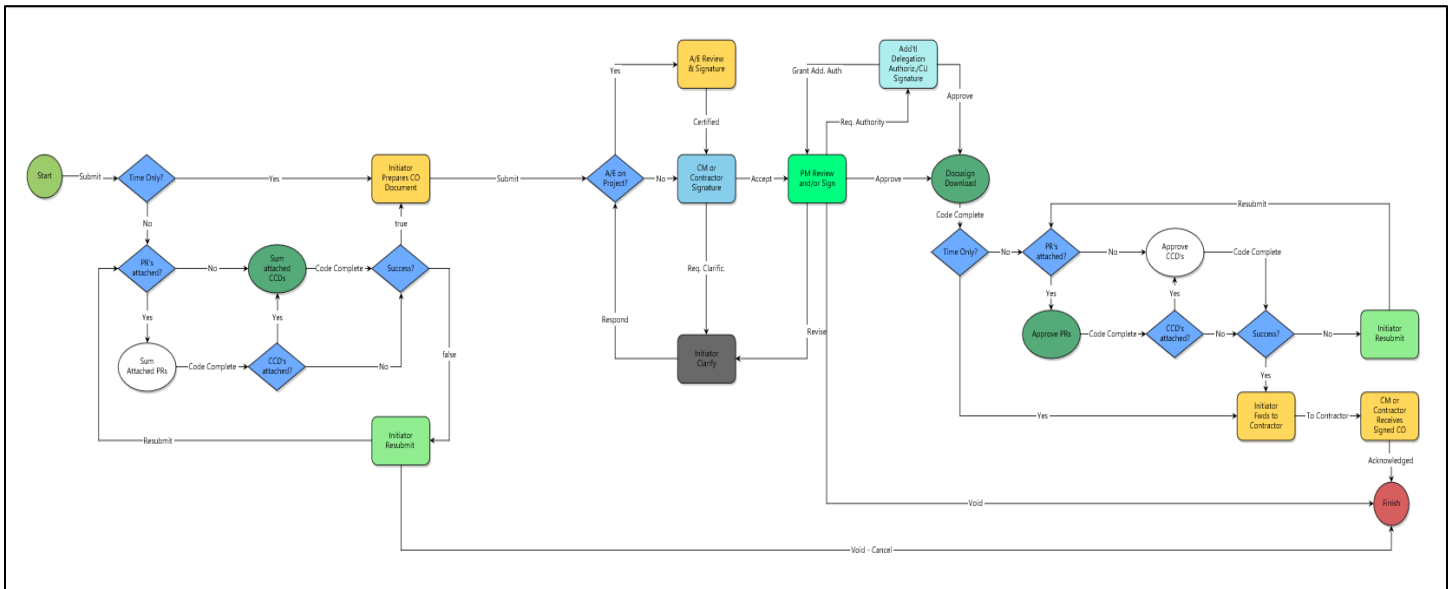


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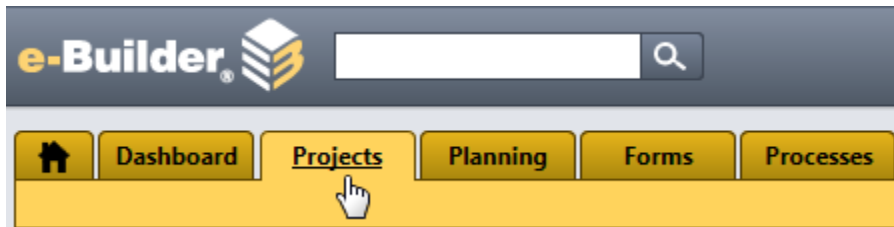
Change Order (CO2) Process

Process for review and approval of Construction Change Orders. The CO2 process is used in conjunction with a Proposal Request (PR) and/or Construction Change Directive (CCD). The A/E, Consultant – Hazmat, and MnSCU Project Manager can start this process.

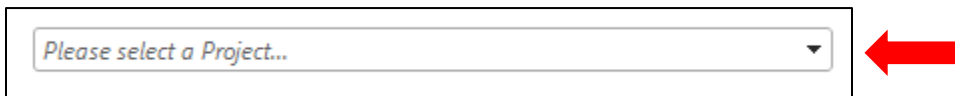


Initiator starts the CO2 process (Actor: A/E, PM, or Consultant Hazmat)

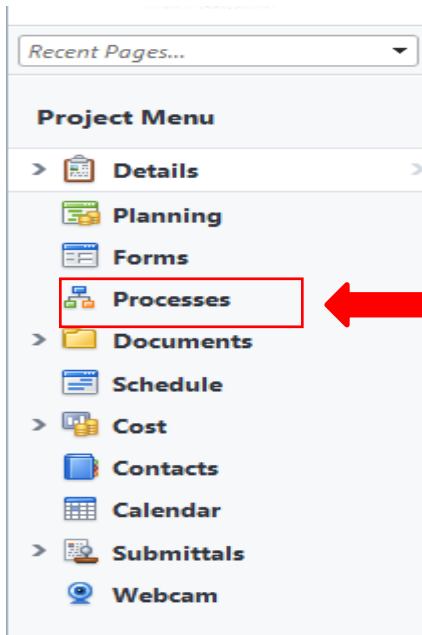
1. Click **Projects** from the Top Navigation tabs.



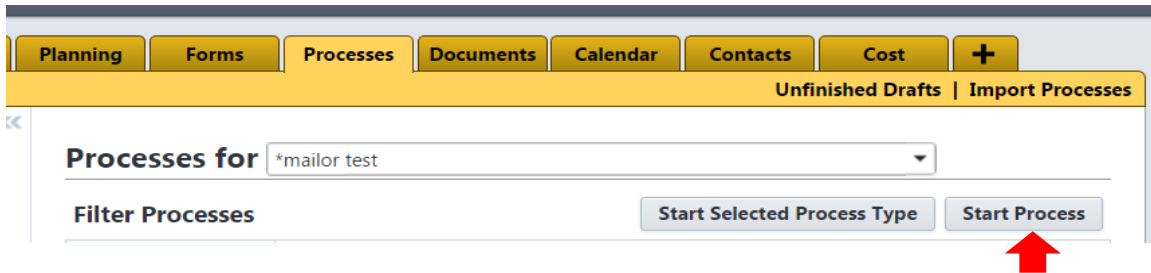
2. Select a project from the drop-down list.



3. Select **Processes** from the Project Menu on the left hand side.



4. Click on **Start Process**



5. Select the **Change Order (Bundle PR and/or CCD Items) (CO2)** process from the list

Start a process on *mailor test

Process Name	Description
Architect's Supplemental Instructions (Spawn PR or CCD) (ASI2)	NEW ASI Process: AE's and Haz Mat Consultants shall use this Process to issue a Architect's Supplemental Instructions (ASI) to Contractors. Depending on the selected "Change Type" this process may spawned the CCD or PR process.
Budget Change Process (BCHG)	Process used to make Budget Changes after the Original Budget has been Approved
Budget Initiation (BI)	Process used to establish an Original Project Budget in e-Builder and to perform a check to determine availability of required Funding.
Change Order (CO)	(OLD) USE THIS PROCESS ONLY IF YOU HAVE AN EXISTING PR or CCD that was created in a "PRCCD PROCESS". If you have a PR using the new PR process or a CCD using the new CCD process, you MUST use the NEW Change Order (Bundle PR and/or CCD items)
Change Order (Bundle PR and/or CCD Items) (CO2)	(NEW) Change Order process to be used by PM's to Bundle previously negotiated Proposal Requests (PR) and/or Construction Change Directives (CCD).
CIP Workflow Process (CIP)	This is going to be used to create the CIP Report by Program Managers
CM at Risk Contract Amendment (CMRA)	Process used to Amend a CM at Risk Contract



6. Fill out the information in the Change Order page. **Note: Read the instruction in the BLUE section.**
 - a) Fill out the Subject (include the PR and/or CCD) process that will be part of this CO2
 - b) Attach the PR and/or CCD using the "PR" or "CCD" tab. Follow the instruction in the blue area below on how to attach PR and/or CCD.

Change Order (Bundle PR and/or CCD Items) (CO2)

Instructions

Start Process

Print

Copy

Check Spelling

Show Workflow

Submit

Save Draft

Delete Draft

Cancel

Project:	*mailor test
Project Number:	
Process:	Change Order (Bundle PR and/or CCD Items)
* Subject:	<input type="text"/>



Details

Attached Documents (0)

Attached Processes (0)

Attached Forms (0)

PR (0)


CCD (0)

PLEASE READ BEFORE PROCEEDING

In order to Submit a CO, you MUST first Select PR's and/or CCD's

1. To select PR's, Click on the "**PR**" Tab
2. Choose "**Attach Existing**"
3. ONLY select the desired PR's sitting in the "**Hold for CO**" Step, then Click "**Attach Existing**"
4. To select CCD's, Click on the "**CCD**" Tab
5. Choose "**Attach Existing**"
6. ONLY select the desired CCD's sitting in the "**Hold for CO**" Step, then Click "**Attach Existing**"
7. Return to this "**Details**" Tab and complete all fields below
8. When done, press "**Submit**"

- c) Continue entering all the information for the rest of the page.
- d) Click **Submit** to move it to the next step.



*** Is there an A/E on the Project?:** Yes No

*** Change Order Number:**

*** Confirm which type of CO Items are attached to this CO:** PRs CCDs

Total Change Amount (PR's & CCD's):

*** Brief Description of Original Scope of Work:** *[Give a brief description of the Scope of Work provided under the original Agreement for Construction Services];*

*** Scope of the Work, Contract Sum or Contract Time have changed due to:** *[Provide a brief explanation of Changes];*

*** Previously Authorized Additive Change Order Numbers to date:**


*** Previously Authorized Deductive Change Order Numbers to date:**

CONTRACT TIME DETAILS


NOTE: If Schedule is impacted by Changes, Schedule must be updated from the Schedule Module

*** Time Change Only?:** Select **"No"** if this Change Order involves money
 Yes - Time Only No

*** Contract Time Will Change by (Calendar Days):**

*** New Date of Substantial Completion:** 

*** Additional Substantial Completion Dates/Details:**



Initiator Prepares CO2 Document (Actor: AE, PM, Consultant Hazmat)

Initiator reviews the information including the attached PRs and/or CCDs. Download the Change Order form from e-Manual, fill out the form, upload it for signature.

1. Initiator download the “**DRAFT Change Oder Form for Editing**” from e_Manual. **Follow the instruction in the blue section to download the Change Order form.** Made update to the Excel document.
2. Save the final version as a PDF and upload it to the “**Change Order for Signature**” field by clicking “**Browse Computer**”.

Change Order (Bundle PR and/or CCD Items) (CO2) - 2 Delete Instance Workflow Override All Fields View Instructions

Submit Take Action Check Spelling Print Copy Save Cancel

Project:	*Current Vendor Training Project	Project Number:	
Process Document:	CO2 - 2 <a>Show History <a>Current Actors	Overall Due Date:	
Current Workflow Step:	Initiator Prepares CO Document <a>Show Workflow Diagram	Step Due Date:	
* Subject:	<input type="text" value="training"/>		
Status:	Submitted		

Click on the PR and CCD tabs and review the attached PR & CCD.

Details Comments (0) Attached Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0) PR (1) CCD (0)

PREPARE CHANGE ORDER DOC

1. **Download** the “**Change Order Form**” from the e-Manual website by clicking on the link in the **Change Order DRAFT for Editing Field.**
2. Complete all areas Noted in **RED.**
3. Once finished **SAVE AS PDF** and **Upload** to the “**Change Order for Signatures**” field.

DRAFT Change Order Form for Editing: ?	HOLD SHIFT + CLICK HERE FOR ACCESS TO THE E-MANUAL FORMS. SELECT CC.41 CONSTRUCTION CHANGE ORDER FORM
* Change Order for Signatures:	<input type="text" value="Drag and drop file here"/> or Browse Computer Browse e-Builder

- Click the link to access the e-Manual to download the Change Order form
- Upload the Final PDF version to the “Change Order to Signatures” field.

3. Review all the information on the page

**IF THE "TOTAL CHANGE AMOUNT" below is *INCORRECT*,
You MUST RE-SELECT the *CORRECT* PR's and/or CCD's**

1. To select PR's, Click on the **"PR"** Tab
2. Choose **"Attach Existing"**
3. ONLY select the desired PR's sitting in the **"Hold for CO"** Step, then Click **"Attach Existing"**
4. To select CCD's, Click on the **"CCD"** Tab
5. Choose **"Attach Existing"**
6. ONLY select the desired CCD's sitting in the **"Hold for CO"** Step, then Click **"Attach Existing"**
7. Return to this **"Details"** Tab and complete all fields below
8. When done, press **"Submit"**

* Is there an A/E on the Project?:	<input checked="" type="radio"/> Yes <input type="radio"/> No
* Change Order Number:	<input type="text" value="002"/>
* Confirm which type of CO Items are attached to this CO:	<input checked="" type="checkbox"/> PRs <input type="checkbox"/> CCDs
Total Change Amount (PR's & CCD's):	2,500.00
* Brief Description of Original Scope of Work:	<i>[Give a brief description of the Scope of Work provided under the original Agreement for Construction Services]:</i> <input type="text" value="test"/>
* Scope of the Work, Contract Sum or Contract Time have changed due to:	<i>[Provide a brief explanation of Changes]:</i> <input type="text" value="test"/>
* Previously Authorized Additive Change Order Numbers to date:	<input type="text" value="test"/>
* Previously Authorized Deductive Change Order Numbers to date:	<input type="text" value="test"/>

CONTRACT TIME DETAILS

NOTE: If Schedule is impacted by Changes, Schedule must be updated from the Schedule Module

* Time Change Only?:	Select "No" if this Change Order involves money <input type="radio"/> Yes - Time Only <input checked="" type="radio"/> No
Is Construction Manager at Risk Contingency?:	Select "Yes" if this Change Order is a Construction Manager at Risk Contingency. <input type="radio"/> Yes - Construction Manager at Risk Contingency only <input checked="" type="radio"/> No
CM@R Change Amount: ?	(For CM at Risk Contingency Only) Enter the total Contingency Change Amount. <input type="text"/>
* Contract Time Will Change by (Calendar Days):	<input type="text" value="0"/>
* New Date of Substantial Completion:	<input type="text" value="02.28.2019"/>
* Additional Substantial Completion Dates/Details:	<input type="text" value="0"/>

Submit Take Action Check Spelling Print Copy Save Cancel



4. Select **"Submit"**, click on **"Take Action"**.

5. **The Choose Users to add to the next steps screen will appear.**

- Select the name of the user from the list and move it to the Selected Users box by clicking on the arrow between the two boxes.
- Click on Submit.

Change Order (Bundle PR and/or CCD Items) (CO2) - 2

[Instructions](#)

Please choose users to add to next step:

Available Users	Selected Users
<input type="text" value="cm, mm (system office)"/> <input type="text" value="con, mm contractor (Tester)"/>	<input type="text" value="ae, mm ae (Tester)"/>
	<input type="button" value=">"/> <input type="button" value="<"/>

Submit Cancel



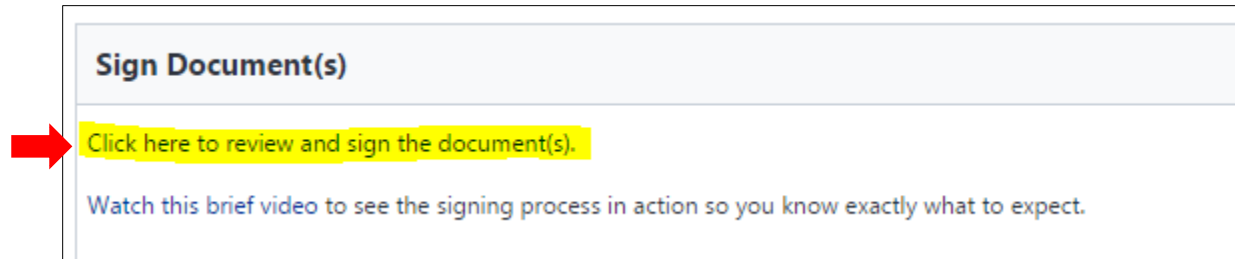
A/E Review and Signature (Actor: AE)

1. A/E select “Certified” action and take action



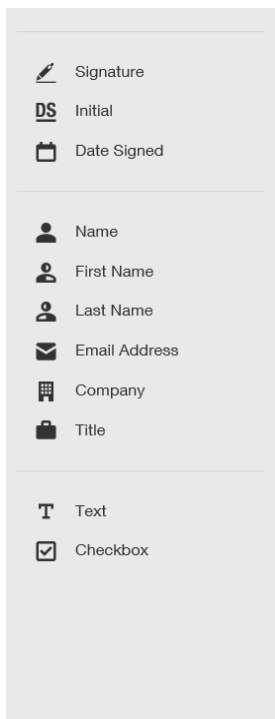
A screenshot of a web interface showing a dropdown menu with the word "Certified" selected. To the right of the dropdown is a button labeled "Take Action". Two red arrows point to the dropdown and the button respectively.

2. Click on the link “Click here to review and sign the document(s)”

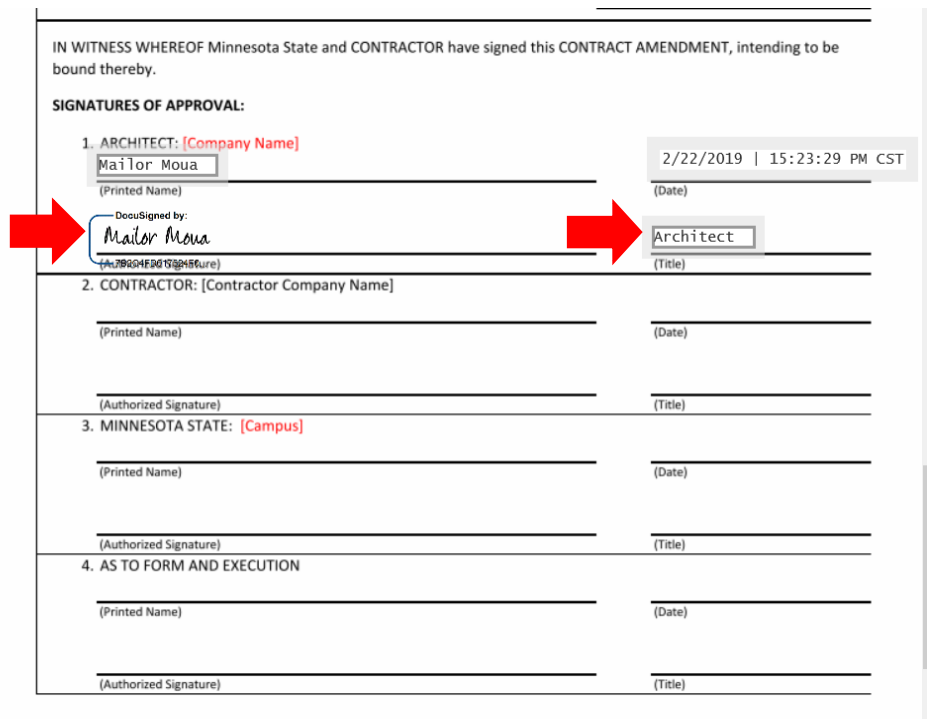


A screenshot of a web interface section titled "Sign Document(s)". Below the title is a link that says "Click here to review and sign the document(s)". This link is highlighted in yellow. Below the link is a text link that says "Watch this brief video to see the signing process in action so you know exactly what to expect." A red arrow points to the highlighted link.

3. The PDF document screen will appear. Click on “Continue” to open the document.
4. Scroll down to the signature section on the page
5. Drag and drop the Signature, Date, and Title from the FIELDS pallet into the appropriate signature block.

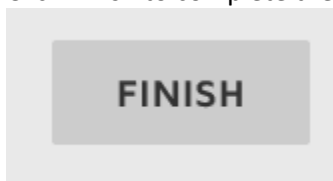


A screenshot of a "FIELDS" pallet in a software application. It contains several categories of elements: "Signature" (represented by a pen icon), "Initial" (DS), "Date Signed" (calendar icon), "Name" (person icon), "First Name" (person icon), "Last Name" (person icon), "Email Address" (envelope icon), "Company" (grid icon), "Title" (briefcase icon), "Text" (T icon), and "Checkbox" (checkbox icon).



A screenshot of a DocuSign approval form. The text at the top reads: "IN WITNESS WHEREOF Minnesota State and CONTRACTOR have signed this CONTRACT AMENDMENT, intending to be bound thereby." Below this is the heading "SIGNATURES OF APPROVAL:". There are four signature blocks. The first block is for the ARCHITECT, with the company name "[Company Name]". It shows a signature field with "Maitor Moua" (Printed Name) and a date field with "2/22/2019 | 15:23:29 PM CST" (Date). Below the signature field is a "DocuSigned by:" field with a handwritten signature "Maitor Moua" and a title field with "Architect" (Title). Red arrows point to the signature and title fields. The second block is for the CONTRACTOR, with the company name "[Contractor Company Name]". The third block is for MINNESOTA STATE, with the company name "[Campus]". The fourth block is for AS TO FORM AND EXECUTION. Each block has fields for (Printed Name), (Date), (Authorized Signature), and (Title).

6. Click Finish to complete the DocuSign.



A screenshot of a large, grey button with the word "FINISH" in bold, black capital letters.

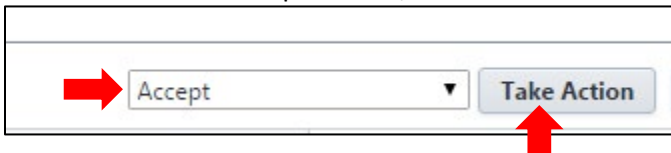
7. Select a user from the Available Users and move it to the Selected Users box
8. Click on Continue



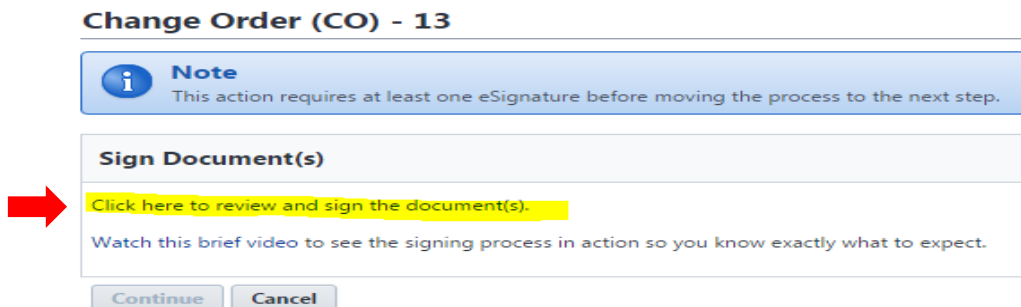
CM or Contractor Signature (Actor: Contractor)

Contractor DocuSign the Changer Order document

1. Contractor select "Accept" action, Take Action.



2. Click the link "Click here to review and sign the document(s)"



3. Follow Step 5 above under the **A/E Review and Signature** section on how to drag and drop the signature, date, title fields to the PDF document

4. Click Continue.

Change Order (CO) - 13

Success
You have successfully signed the document(s).

Sign Document(s)

Click the 'Continue' button to move the process to the next step.

[Click here to review the document\(s\).](#)

PM Review and/or Sign the Change Order (Actor: PM)

MnSCU Project Manager review all documentations and approve the change order

1. PM select "Approve" action, Take Action

2. Click the link "Click here to review and sign the document(s)"

Change Order (CO) - 13

Note
This action requires at least one eSignature before moving the process to the next step.

Sign Document(s)

[Click here to review and sign the document\(s\).](#)

[Watch this brief video to see the signing process in action so you know exactly what to expect.](#)

3. Follow Step 5 above under the **A/E Review and Signature** section on how to drag and drop the signature, date, title fields to the PDF document
4. Click Continue.

Initiator forwards Change Order to Contractor (Actor: AE, PM, Consultant-Hazmat)

1. A/E review signed Change Order and select “To Contractor”, Take Action

Change Order (CO) - 13 Instructions

Accept To Contractor Take Action Check Spelling Print Copy Save Cancel

Project:	*mailor test	Project Number:	
Process Document:	CO - 13 Show History Current Actors	Overall Due Date:	
Current Workflow Step:	Initiator Fwds to Contractor Show Workflow Diagram	Step Due Date:	
* Subject:	<input type="text" value="Change Order for eB guide"/>		
Status:	Approved		

Details Comments (2) Attached Documents (1) Attached Processes (0) Attached Forms (0) Attached To (0) PR/CCDs (1) PR/CCDs (0)

Change Order (Fully Executed):

To Contractor Take Action Check Spelling Print Copy Save Cancel

2. A/E Choose Contractor to add to next step, Click on “To Contractor”

Change Order (CO) - 13 Instructions

Please choose users to add to next step:

Available Users	Selected Users
<input type="text" value="VNDR, Mailor Vendor (mnsu)"/>	<input type="text" value="con, mm contractor (Tester)"/>
	> <

To Contractor Cancel

Contractor Receives Signed Change Order (Actor: Contractor)

Contractor review fully executed Change Order and acknowledge received of Change Order.

1. Contract select “Acknowledged”, Take Action


Change Order (CO) - 13 Instructions

Accept Acknowledged Take Action Check Spelling Print Save Cancel

Project:	*mailor test	Project Number:	
Process Document:	CO - 13 Show History Current Actors	Overall Due Date:	
Current Workflow Step:	CM or Contractor Receives Signed CO Show Workflow Diagram	Step Due Date:	
* Subject:	<input type="text" value="Change Order for eB guide"/>		
Status:	Approved		

Details Comments (2) Attached Documents (1) Attached Processes (0) Attached Forms (0) Attached To (0) PR/CCDs (1)

PR/CCDs (0)

Change Order (Fully Executed):	 Contract Signature Page for DocuSign_signed.pdf (version 2) Properties Download (135.8KB) Redline
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Acknowledged Take Action Check Spelling Print Save Cancel

2. Change Order process is completed and move to the “Finish” step. At the same time, the attached PRs and/or CCDs processes also automatically move to the “Finish”.