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
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.

**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.
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”.

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

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"

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is there an A/E on the Project?</td>
<td>Yes, No</td>
</tr>
<tr>
<td>Change Order Number</td>
<td>002</td>
</tr>
<tr>
<td>Confirm which type of CO Items are attached to this CO:</td>
<td>PRs, CCDs</td>
</tr>
<tr>
<td>Total Change Amount (PR's &amp; CCD's)</td>
<td>2,500.00</td>
</tr>
<tr>
<td>Brief Description of Original Scope of Work</td>
<td>test</td>
</tr>
<tr>
<td>Scope of the Work, Contract Sum or Contract Time have changed due to:</td>
<td>test</td>
</tr>
<tr>
<td>Previously Authorized Additive Change Order Numbers to date:</td>
<td>test</td>
</tr>
<tr>
<td>Previously Authorized Deductive Change Order Numbers to date:</td>
<td>test</td>
</tr>
</tbody>
</table>
4. Select “Submit”, click on “Take Action”.

5. The Choose Users to add to the next steps screen will appear.
   a. 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.
   b. Click on Submit.

Change Order (Bundle PR and/or CCD Items) (CO2) - 2
A/E Review and Signature (Actor: AE)

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

   ![Image of action selection]

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

   ![Image of review and sign document]
   
   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. 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.

   ![Image of signature drag and drop]

6. Click Finish to complete the DocuSign.
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 Change Order document


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.

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)”

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

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

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”.

![Change Order (CO) - 13](image-url)