



**MINNESOTA STATE**

Minnesota State Colleges and Universities

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## **Change Order (CO) Process**

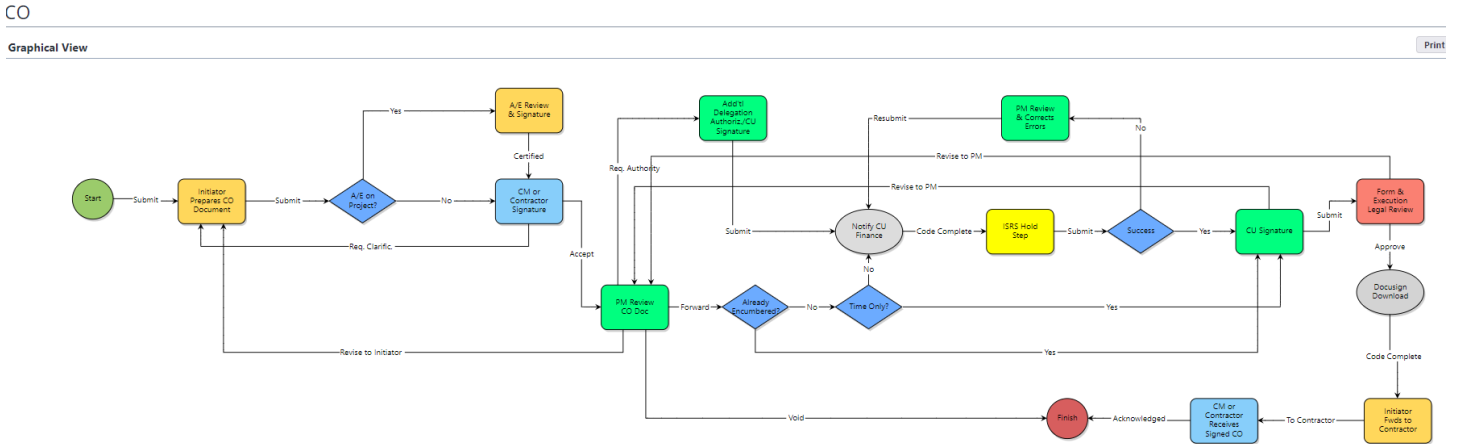
**For more information contact System Office e-Builder Support in the Facilities website <https://www.minnstate.edu/system/finance/facilities/design-construction/index.html>.**

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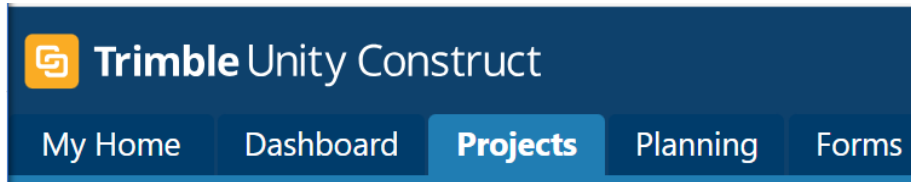
# Change Order (CO) Process

Process for review and approval of Construction Change Orders. The CO process is used in conjunction with a Proposal Request (PR) and/or Construction Change Directive (CCD). The A/E, Consultant – Hazmat, Owner’s Rep, and MinnState Project Manager can start this process. The CO process will integrate into Workday in the ISRS Hold Step.

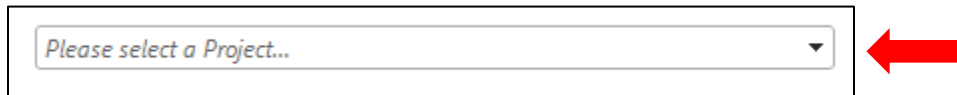


Starts the CO process (Actor: A/E, PM, or Consultant Hazmat)

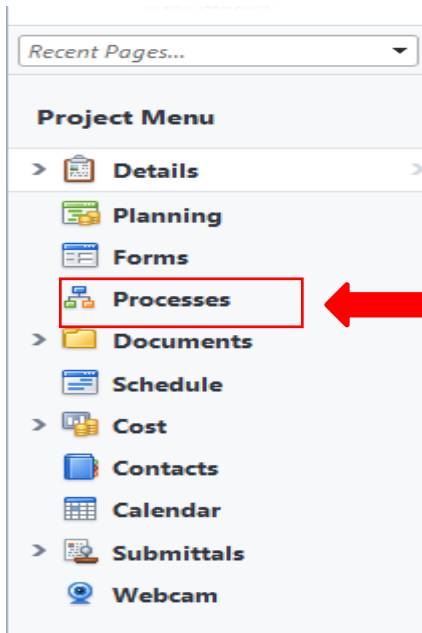
1. Click **Projects** from the Top Navigation tabs.



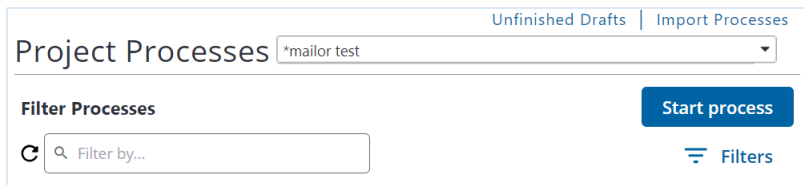
2. Select a project from the drop-down list.



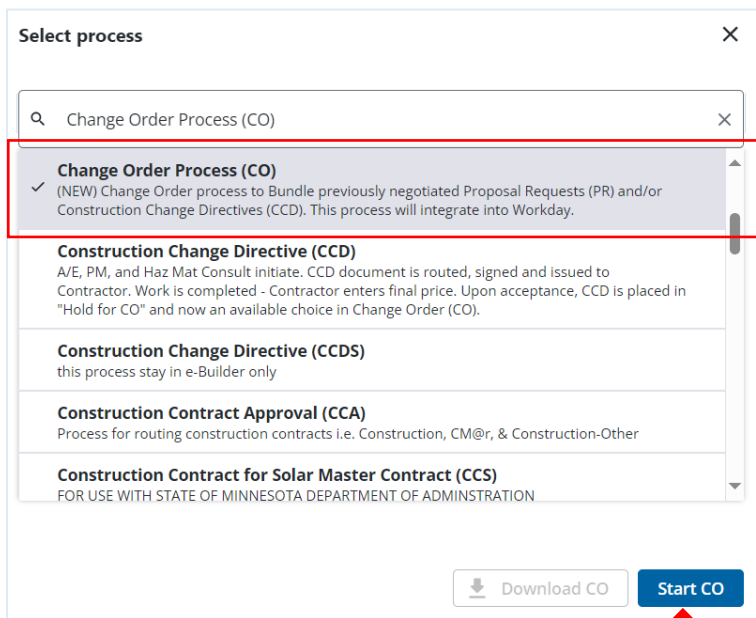
3. Select **Processes** from the Project Menu on the left-hand side.



4. Click on **Start Process**



5. Select the **Change Order (CO)** process from the list, click "Start CO."



6. Fill out the Change Order Details page. Read the instructions in the BLUE section.

- a) Fill out the Subject (include the PR and/or CCD) process that will be part of this CO.
- b) Attach the PR and/or CCD using the "PR" or "CCD" tab. Note that the PR and/or CCD will be in the Finish step.

Change Order Process (CO)

Start Process Print Check Spelling Submit Save

Project: \*mailor test  
 Process: Change Order Process  
 Subject:

Details Documents (0) Attached Processes (0) Attached Forms (0) CCD (0) PR (0)

Expand All | Collapse All

**PLEASE READ BEFORE PROCEEDING**

**You MUST first Select the finished PR's and/or CCD's for this change order**

**In Subject: Please include the PR and CCD number(s) for reference.**

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

c) Attach PR process.

- a. Click the PR tab.
- b. Click Attached Existing.

Change Order Process (CO) - 4 Delete Instance Workflow Override All Fields View Instructions

Submit Take Action Check Spelling Print Copy Save Cancel

Project: \*mailor test  
 Process Document: CO - 4  
 Show History | Current Actors  
 Current Workflow Step: Initiator Prepares CO Document Show Workflow Diagram  
 Subject: Test 3  
 Status: Submitted

Overall Due Date:  
 Step Due Date:

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

PR's Remove Attach Existing Add New

Process Prefix - Counter	Subject	PR Amount	Status	Current Step
There are no processes to display.				

Submit Take Action Check Spelling Print Copy Save Cancel

- c. Filter the PR by selecting the Status "Open" and "Finish." This will show all existing PRs in the project.
- d. Select the Finish PR to include in this CO process.
- e. Click Attach Existing.

Lookup Process

Status: All Statuses  Open  Finished  
 Step Name:   
 Containing Text:

Filter

PR's Attach Existing

Process Prefix - Counter	Subject	PR Amount	Status	Current Step
<input type="checkbox"/> PR - 10	CO 1 PR 1 pr 2 cc1 cc2	0.00	Submitted	CM or Contractor Prepares Proposal
<input type="checkbox"/> PR - 13	CO 1 PR 1 pr 2 cc1 cc2	1,000.00	Pending	PM Review of Proposal
<input type="checkbox"/> PR - 11	CO 1 PR 1 pr 2 cc1 cc2	1,000.00	Pending	Finish
<input type="checkbox"/> PR - 9	CO 1 PR 1 pr 2 cc1 cc2	0.00	Submitted	CM or Contractor Prepares Proposal
<input type="checkbox"/> PR - 8	CO 1 PR 1 pr 2 cc1 cc2	0.00	Submitted	CM or Contractor Prepares Proposal
<input type="checkbox"/> PR - 12	CO 1 PR 1 pr 2 cc1 cc2	1,000.00	Pending	Initiator Review (PR)
<input checked="" type="checkbox"/> PR - 3	test	200.00	Approved	Finish

**Attach Existing**

- d) Attach CCD process.
  - a. Click the CCD tab.
  - b. Click Attached Existing.

Change Order Process (CO) - 4

Project: \*mailor test  
 Process Document: CO - 4  
 Current Workflow Step: Initiator Prepares CO Document  
 Subject: Test 3  
 Status: Submitted

Overall Due Date:  
Step Due Date:

Process Prefix - Counter	Subject	PR Amount	Status	Current Step
There are no processes to display.				

- c. Filter the CCD by selecting the Status "Open" and "Finish." This will show all existing CCDs in the project.
- d. Select the Finish CCD to include in this CO process.
- e. Click Attach Existing.

7. Select the Commitment and enter the Contract Change Amount. See instructions in the blue area.

**INSTRUCTIONS FOR INITIATING THIS CHANGE ORDER (CO)**

- Select the appropriate Contract under the below "Commitment" drop-down
- Select the appropriate "Reason Code" for the Change being proposed
- Select the "Add All Existing Items". The Commitment Change Items table will appear.
- ENTER THE APPROPRIATE **CONTRACT CHANGE AMOUNT (IF \$0, ENTER 0.00)** in the "Change Amount" column in the TABLE BELOW
- Complete the remaining Fields with all known information

**Commitment Change Details**

\* Commitment: CCA-1 - test CM@r contingency  
 Status: Draft  
 \* Date Of Change: 01.13.2025  
 Company: Test Contractor2  
 \* Reason Code: Field Condition (Changes)

**Commitment Change Custom Fields**

PO Number:  
 Transaction ID:  
 Transaction Date:

**Commitment Change Items**

#	Commitment Item	Description	Budget Line Item	Funding Rule	Retainage Percent	Current Commitment Amount	Change Amount	Net Commitment Amount	Custom F
Delete 001	001	Improvements/Betterments to...	05.5210	Custom	0.00	5,003,000.00	0.00	5,003,000.00	
Delete 002	002	Constr Mgr @ Risk Contingency	05.5216	Custom	0.00	98,000.00	0.00	98,000.00	
<b>Total</b>						5,101,000.00	0.00	5,101,000.00	

- 8. Complete the remaining Fields with all know information.
- 9. Select "Submit" to forward it to the next step.

## Initiator Prepares CO Document (Actor: Initiator. The Initiator is the person that starts the CO process.)

The 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. Initiators download the **“DRAFT Change Oder Form for Editing”** from eManual. **Follow the instructions 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.”**

**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:**

3. Review the rest of the information on the page. Select the action **“Submit,”** click Take Action to forward it to the next step.

4. **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

[Instructions](#)

Please choose users to add to next step:

Available Users

- cm, mm (system office)
- con, mm contractor (Tester)

Selected Users

- ae mm ae (Tester)

## A/E Review and Signature (Actor: AE)

The AE reviews the included CO document and AE signs the change order.

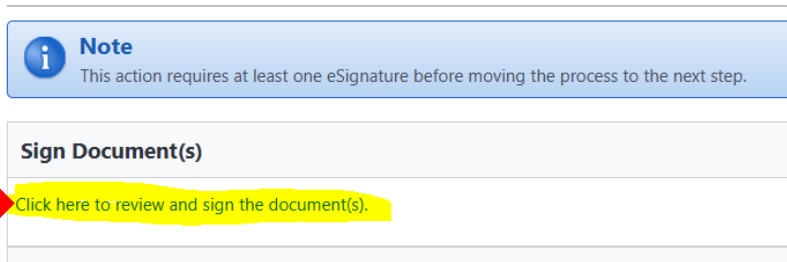
1. A/E select “Certified” action and Click Take Action.



A screenshot of a web form. On the left, there is 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.

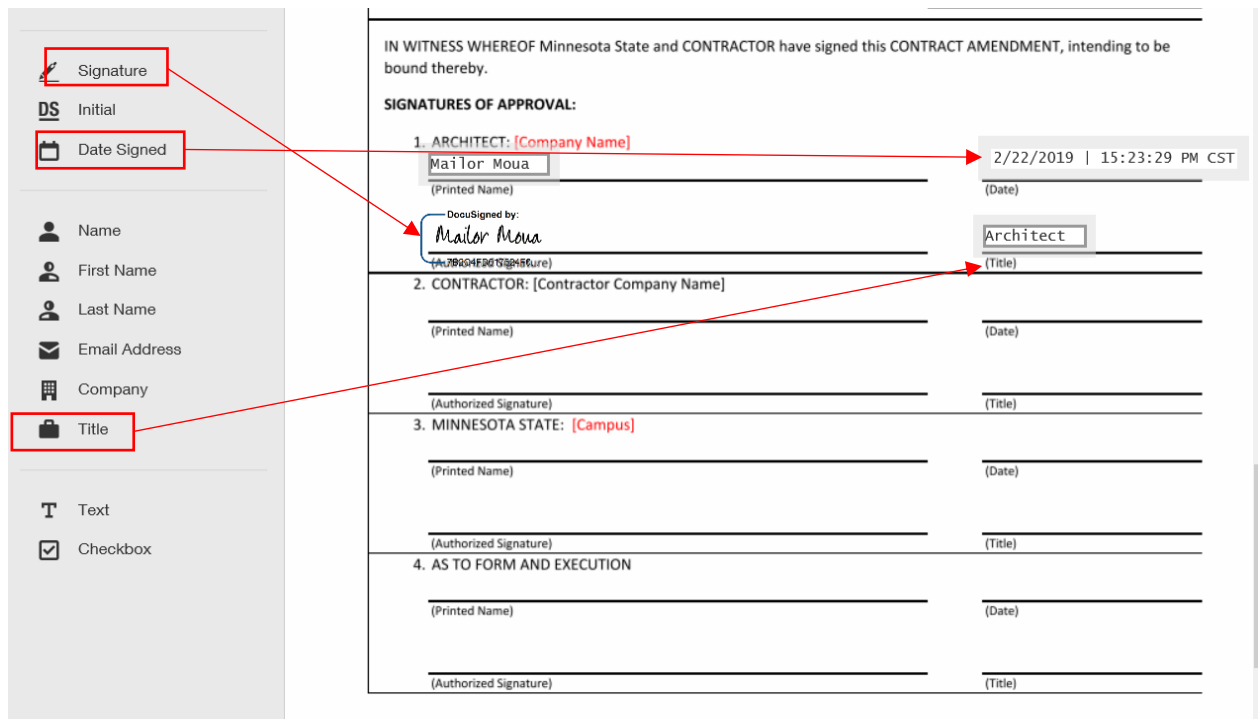
2. Click on the link “Click here to review and sign the document(s)”

### Change Order Process (CO) - 15



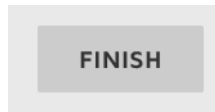
A screenshot of a web interface. At the top, there is a blue box with an information icon and the word "Note". Below it, a grey box contains the text "Sign Document(s)". Underneath, a link "Click here to review and sign the document(s)." is highlighted in yellow. A red arrow points to this link.

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 on the left into the appropriate signature block.



A screenshot of a DocuSign signature screen. On the left is a 'FIELDS' pallet with icons for 'Signature', 'Date Signed', and 'Title'. On the right is a document titled "SIGNATURES OF APPROVAL" with four signature blocks. Red arrows indicate the fields being dragged into the document: 'Signature' into the first block, 'Date Signed' into the date field of the first block, and 'Title' into the title field of the first block. The first block is partially filled with the name "Maïlor Moua" and the date "2/22/2019 | 15:23:29 PM CST".

6. Click Finish to complete the DocuSign.



A screenshot of a grey button with the word "FINISH" in white capital letters.



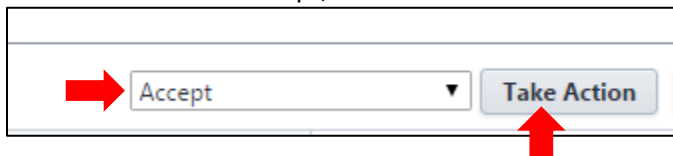
7. Select a user from the Available Users and move it to the Selected Users box.
8. Click on Certified to move it to the next step.



## CM or Contractor Signature (Actor: Contractor)

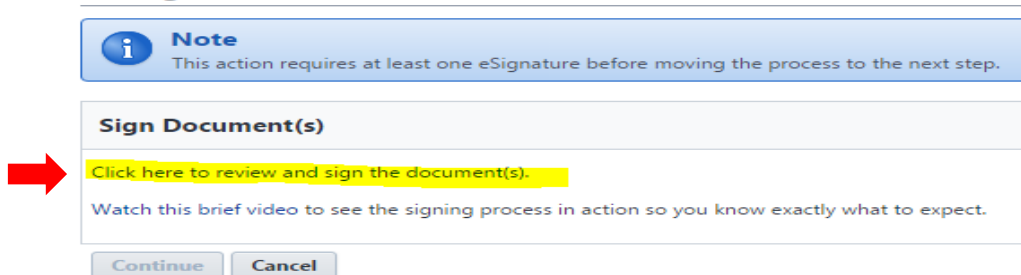
Contractor DocuSign the Changer Order document

1. Contractor selects "Accept;" Click Take Action.

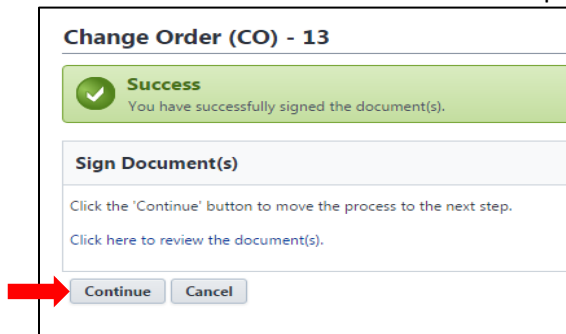


2. Click the link "Click here to review and sign the document(s)"

### Change Order (CO) - 13



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 to forward it to the next step.



## PM Review CO Doc (Actor: PM)

The Project Manager reviews all the information and verifies the funding source then approves and forwards it to the ISRS Hold step which will integrate into Workday to be encumbered by the MinnState Business office.

1. The Project Manager reviews the contract change amount in the table. Verify that the right funding source is selected by clicking on “Custom” under the Funding Rule column.

Commitment Change Items										
#	Commitment Item	Description	Budget Line Item	Funding Rule	Retainage Percent	Current Commitment Amount	Change Amount	Net Commitment Amount	Custom	
Delete	001	001	Improvements/Betterments to...	05.5210	Custom	0.00	5,003,000.00	100.00	5,003,100.00	
Delete	002	002	Constr Mgr @ Risk Contingency	05.5216	Custom	0.00	98,000.00	0.00	98,000.00	

2. If the funding source is incorrect but there is no pencil next to Custom, to change the funding source, the Project Manager will need to add a new line item for the change order amount. DO NOT enter an amount into the existing line(s) or if there’s an amount in the line, replace it with a zero. **To add a new line item:**
  - a) Scroll to the section “**Add Additional Scope Commitment Item.**”
  - b) Click the link “Please Select a Line Item.”

### Add Additional Scope Commitment Item




Item Number	<input type="text" value="003"/>
Account Code	Please Select a Line Item
Commitment Item	<input type="text"/>

- c) The Budget Line Items screen will appear. Select the right Account Code by double clicking on the number.


Account Code	Description
01.0110	Unclassified Full-Time Salary
<u>01.5000</u>	Property Acquisition-Land Purchase
01.5010	Property Acquisition-Perpetual Easements
01.5205	Property Acquisition-Building Purchase
02.1529	Predesign Fees-Architect & Engineering Service
03.1530	Design Fees-Architect & Engineering Service
03.1583	Design Fees-Reimbursables
04.0110	Unclassified Full-Time Salary
04.1110	Advertising
04.1515	Code Review Fees - Program Development & Evaluation (by Non-Gov't Agency)
04.1516	Code Review Fees - Program Development & Evaluation (by Gov't Agency)
04.1518	Site Property & Topographic Survey
04.1519	Geotechnical Survey & Soil Borings
04.1522	Non-State Project Management (Owner's Rep. Basic Services or CM @ Risk Pre-Const Basic Services)
04.1523	Inspection & Testing Consultants - Construction Inspections & Testing Services
04.1525	Systems Commissioning Agent
04.1531	Designer Selection Board Expenses
04.1540	Hazardous Material Abatement, Design and Monitoring - (Provided by Non-State Agency)
04.1550	Legal Fees - Outside Att. Gen Office
04.1551	Legal Fees - Att. Gen Office
04.1552	Legal Fees - State Agency, not Att. Gen Office
04.1564	State Staff Program Management Fee
04.1565	State Staff Construction Project Management Fee
04.1570	Other Professional/Technical Services - Design Support Consultants
04.1571	State Agency - Other Consulting Services

- d) After the above is done, the selected account code will show up in the “Add Additional Scope Commitment Item” screen.
- e) Enter the retainage Percent.
- f) Enter the Change Amount.

**Add Additional Scope Commitment Item**

Item Number	003
Account Code	05.5210
Commitment Item	DRAFT - 05.5210
Description	Improvements/Betterments to Buildings
Funding Rule	 [dropdown]
Retainage Percent	5.00
Change Amount	100.00
Custom Field(s)	
Equipment Item(s)	

**Add**

- g) Click the green  sign. The Funding Source Distribution screen will pop up. Enter the percentage of the amount to each funding source listed. *Note: once this new line is added to the table, the funding source can be split by the amount instead of percentage.*
- h) Click Save.

**Funding Source Distribution For : CO 1**



Amount: 100.00

Funding Source	Percentage	Amount
2015 GO	0.00	0.00
2015 HEAPR	0.00	0.00
2016 GO	0.00	0.00
2016 HEAPR	0.00	0.00
2020 funding source for GO	100	100.00
2023 funding source	0.00	0.00
CC00000-FD0001-FN980	0.00	0.00
CC00000-FD0002-FN980	0.00	0.00
<b>Total</b>	<b>100.00</b>	

**Save** **Cancel**

- i) Click “Add” to add the new line into the Commitment Change Items table.

**Add Additional Scope Commitment Item**

Item Number	003
Account Code	05.5210
Commitment Item	CO 1
Description	Improvements/Betterments to Buildings
Funding Rule	Custom <small>Please enter a value for Funding Rule</small>
Retainage Percent	5.00
Change Amount	100.00
Custom Field(s)	
Equipment Item(s)	

**Add**

j) The new line is now added to the Commitment Change Items table.

#	Commitment Item	Description	Budget Line Item	Funding Rule	Retainage Percent	Current Commitment Amount	Change Amount	Net Commitment Amount	Custom
Delete 001	001	Improvements/Betterments to...	05.5210	Custom	0.00	5,003,000.00	0.00	5,003,000.00	
Delete 002	002	Constr Mgr @ Risk Contingency	05.5216	Custom	0.00	98,000.00	0.00	98,000.00	
Delete 003	CO 1	Improvements/Betterments to...	05.5210	Custom	5.00	0.00	100.00	100.00	
<b>Total</b>						<b>5,101,000.00</b>	<b>100.00</b>	<b>5,101,100.00</b>	

k) Double check your funding source in the new line by clicking on the pencil next to Custom. The Funding source distribution will appear. You can split the change amount between different funding sources using the amount instead of percentage.

Funding Source	Percentage	Amount
2015 GO	0.00	0.00
2015 HEAPR	0.00	0.00
2016 GO	0.00	0.00
2016 HEAPR	0.00	0.00
2020 funding source for GO	0.00	0.00
2023 funding source	0.00	0.00
CC00000-FD0001-FN980	65.00	65
CC00000-FD0002-FN980	35.00	35
<b>Total</b>		<b>100.00</b>

l) Scroll to the Funding Source section, select “Yes” to the question “Is Funding Source verified?”

**Funding Source**

\* Is Funding Source verified?:  Yes  No

m) Select the “Forward,” click Take Action to forward to the next step.

Forward ▼ **Take Action** Check Spelling Print Copy Save Cancel

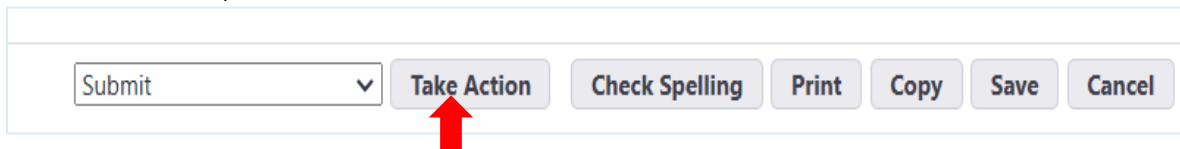
## ISRS Hold Step.

**DO NOT TAKE ACTION!** The CO process is in the ISRS Hold step in e-Builder and has integration into Workday. Once it receives a success respond from Workday, it will **automatically** move out of this step and move to the next.

## CU Signature step (Actor: Project Manager or CU Authorized Approver)

The Project Manager or CU Authorized Approver signs the change order.

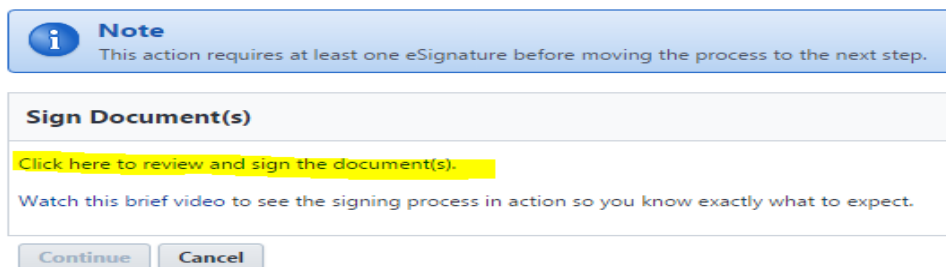
1. PM select "Submit," click Take Action.



A screenshot of a software interface. At the top, there is a dropdown menu with the word "Submit" and a downward arrow. To the right of the dropdown are several buttons: "Take Action", "Check Spelling", "Print", "Copy", "Save", and "Cancel". A red arrow points to the "Take Action" button.

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

### Change Order (CO) - 13



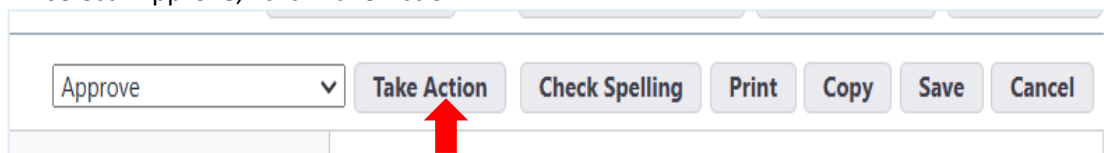
A screenshot of a software interface titled "Change Order (CO) - 13". It features a blue "Note" box with an information icon and the text: "This action requires at least one eSignature before moving the process to the next step." Below the note is a section titled "Sign Document(s)". Inside this section, the link "Click here to review and sign the document(s)." is highlighted in yellow, and a red arrow points to it from the left. Below the link is the text: "Watch this brief video to see the signing process in action so you know exactly what to expect." At the bottom of the section are two buttons: "Continue" and "Cancel".

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. Once the document is successfully signed

## Form & Execution Legal Review (Actor: Form& Execution Legal Reviewer)

The Form & Execution Legal Review reviews the information including all attachments and signs the change order.

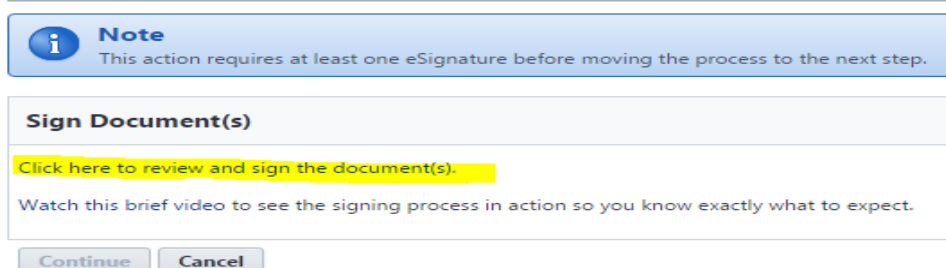
1. PM select "Approve," click Take Action.



A screenshot of a software interface. At the top, there is a dropdown menu with the word "Approve" and a downward arrow. To the right of the dropdown are several buttons: "Take Action", "Check Spelling", "Print", "Copy", "Save", and "Cancel". A red arrow points to the "Take Action" button.

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

### Change Order (CO) - 13



A screenshot of a software interface titled "Change Order (CO) - 13". It features a blue "Note" box with an information icon and the text: "This action requires at least one eSignature before moving the process to the next step." Below the note is a section titled "Sign Document(s)". Inside this section, the link "Click here to review and sign the document(s)." is highlighted in yellow, and a red arrow points to it from the left. Below the link is the text: "Watch this brief video to see the signing process in action so you know exactly what to expect." At the bottom of the section are two buttons: "Continue" and "Cancel".

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. Once the document is successfully signed.

## Initiator forwards Change Order to Contractor (Actor: Initiator)

1. Initiator review the signed Change Order and select “To Contractor,” click 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 <a href="#">Show History</a>   <a href="#">Current Actors</a>	Overall Due Date:	
Current Workflow Step:	Initiator Fwds to Contractor <a href="#">Show Workflow Diagram</a>	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

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)"/>
	<span style="margin-left: 10px;">&gt;</span> <span style="margin-left: 10px;">&lt;</span>

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 <a href="#">Show History</a>   <a href="#">Current Actors</a>	Overall Due Date:	
Current Workflow Step:	CM or Contractor Receives Signed CO <a href="#">Show Workflow Diagram</a>	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):	 <b>Contract Signature Page for DocuSign_signed.pdf (version 2)</b> <a href="#">Properties</a>   <a href="#">Download (135.8KB)</a>   <a href="#">Redline</a>
--------------------------------	---

Acknowledged Take Action Check Spelling Print Save Cancel

2. Change Order process is completed and move to the “Finish” step. The change amount is now reflected in the Contractor’s contract.