

Change Order Quick Reference Guide

November 2019



Prepared for the Mayo Clinic Enterprise Kahua Deployment

CHANGE ORDER OVERVIEW

The Change Order application is a sub application located in the Expenses application under the Cost Management section.

A Change Order is created from a Change Event or Change Request. When a Change Event or a Change Request has been fully approved, Mayo Clinic will process the record into a Changer Order. To see that process, please refer to the Change Event and Change Request QRGs.

Recent	Cost Management	Other
Expenses		Some Community
Getting Started	Funding	Contacts
Work Breakdown	MA Master Agreement	File Manager
Funding	Work Breakdown	U Getting Started
MA Master Agreement	Document Management	E Groups
Administration	Communications	Mi Milestones
Company Profiles	Daily Reports	PD Project Directory
Configuration	Field Observations	Projects
Dev Logs	A Meetings	RB Recycle Bin
Domain Settings	Packaged Submittals	
Installed Apps	Punch Lists	
KCreator	D RFIs	
Licenses	Index Management	
PT Project Tasks	SM Site Management	
Share Manager		
Users		
~ •		
		\bigcirc
Apps Project Finder Tas	sks Messages Expenses	Getting Started
ontracts Change Even	ts Change Requests	Change Orders Pay Requests Purchase Orders Invoices

This document describes the Change Order approval process.

Note: A new Change Order can be created directly in the Change Order application and can be enabled to override the workflow process to accommodate change orders coming from CIPs who do not use Kahua. See the Creating a Change Order and Overriding Workflow Process section below.

SENDING A CHANGE ORDER

These steps concern the Mayo Clinic users only.

Once a Change Request or a Change Event is processed, the record needs to be sent back to the Construction Industry Partners (CIPs) to get their digital signature on the Change Order.

CHANGE REQUEST

When a Change Request is processed into a Change Order:

1. Verify that all the data that has been transferred from the change request is accurate.

Notice that an initiating document is attached in the REFERENCES section.

✓ REFERENCES		
E VIEW UPLOAD ADD KAHUA DOC EDIT MARKUP UPDATE REMOVE DOWNLOAD ADD COMPOSITE		
TYPE DESCRIPTION	CONTRIBUTOR	DATE
✓ Initiating Document	_	
Initiating Document 🗋 Contract 0001 Newman Construction 0002 hidden tank \Change_Request_ContractChangeRequestViewReport_0002.pd	ſ	8/29/2018 3:45

2. Add a comment in the Comments / Schedule Milestones if necessary.

Delivery Method	Stipulated Sum	
Comments / Schedule Milestones		
Cost Status	Draft	

3. Select Save.

Upon clicking **Save** the currency amounts are displayed at the top of the record.

Note the currency amounts displayed at the top of the record will be categorized based on the type of contract selected to be associated with this change document (Construction, Design or CM at Risk / Design Build).

Construction Contract:

Change Order - 0002		Edit
	Labor	\$20,000.00
	Construction Subcontracted Subtotal Labor + Construction Subcontracted	\$20,000.00
	Material Construction Fee	\$15,000.00 \$55,000.00
	Tax Other Construction Reimbursables	
	Total Original Contract Amount	\$90,000.00 \$100.000.00
	Previous Change Orders Previous Contract Amount	\$0.00 \$100.000.00
	Current Contract Amount	\$100,000.00

Design Contract:

Contract 0003 CBRE Sandbox 0001 Description goes here Pre	view
Prof Services Fee \$75,00 Prof Services Sub-consultant \$55,00 Subtotal Prof Services Fee + Prof Services Sub-consultant \$130,00 Prof Services Reimbursable \$25,00 Total \$155,00 Original Contract Amount \$250,00 Previous Contract Amount \$250,00 Current Contract Amount \$250,00	00.00 00.00 00.00 00.00 00.00 00.00 \$0.00 00.00 00.00

CM at Risk / Design Build Contract:

	,
Prof Services Fee	\$1,280.00
Prof Services Sub-consultant	
Subtotal Prof Services Fee + Prof Services Sub-consultant	\$1,280.00
Prof Services Reimbursable	\$750.00
Labor	\$6,900.00
Construction Subcontracted	\$3,000.00
Subtotal Labor + Construction Subcontracted	\$9,900.00
Material	\$2,430.00
Construction Fee	\$1,200.00
Tax	\$988.00
Other Construction Reimbursables	
Total	\$16,548.00
Original Contract Amount	\$1.00
Previous Change Orders	\$0.00
Previous Contract Amount	\$1.00
Current Contract Amount	\$1.00

4. To send the Change Order to the CIPs, select **Send for CIP Signature**, which appears after the pushing of **Save**.

8 ° (1)				為
Apps Project Finder Tasks Messages Expenses Getting Started				Ψ L ~
Contracts Change Events Change Requests Change Orders Pay Requests Purch	nase Orders	Invoices		
NEW REPORTS MORE V SEND EDIT VIEW DELETE HISTORY				∀ Ø 🗆 ¥
		SEND EDIT VIEW DELETE HISTORY	(
Search All	a 🖨	Contract 0003 CBRE Sandbox 00	01 Description does here	Preview
Contract Number Vendor Change Order Number Description	Cost Status		for Bosonplion good hord	1101101
Contract 0004 Acme Inc. 0002 081579 Asbestos removal	Draft			Prof Services Fee \$75,000.00
Contract 0003 CBRE Sandbox 0001 Description goes here	Draft			Prof Services Sub-consultant \$55,000.00 Subtotal Prof Services Fee + Prof Services Sub-consultant \$130,000.00
2 Item(s)				Prof Services Reimbursable \$25,000.00 Total \$155.000.00
				Original Contract Amount \$250,000.00
				Previous Change Orders \$0.00 Previous Contract Amount \$250,000.00
				Current Contract Amount \$250,000.00
		Details Review Items Signatures Re	ferences	
		→ DETAILS		
		Project Number		
		Project Name	Beau Esmonde Test Project	
		Contract	Contract 0003 CBRE Sandbox	
		Contact	Beau Esmonde	
		Contract Signatory		
		Vendor Number		
		Type of Change / Request	Owner's Request for Proposal	
		Requested Date	11/30/2019	1
		Number	0001	
		Description	Description more here	
		Affect to Contract Sum	Ves	
		Affect to Contract Time	34	
		Cause of Change	Owner Request	
		Cause of Change - Comments		
		Comments / Schedule Milestones		
		Cost Status	Draft	
		* REVIEW		
		Dete Ordenitie d		
		Date Submitted		
		Send for CIP Signature Mark CI	P Signature Rec'd Lock	

5. If the CIP Signature has been received outside of the workflow, upload the signed reference document as an attachment, click Mark CIP Signature Rec'd. This will bypass the CIP signature workflow and submit the change order to Mayo users in the approvals workflow for signoff.

	002	.C2101C2	2430 Sitework	Sitework	Labor	Draft	\$20,000.00		
) ک	003	.C2101C2	2010 General Construction	General Construction	Construction Fee	Draft	\$55,000.00		
Other C	Costs P	roposed	Enter a summary descript Order contract form.	ion of all cost items of ty	/pe 'Other'. The val	ue of this fie	eld will be entered or	n the Chang	ge
✓ SIGNA	ATURES	6							
								G]
				Approver	Role		Signatura		
_		A	pprover				Signature		Арр
→ REFEI		A S EW DOWN	LOAD					J	App
• REFEI		S EW DOWN						y y	Арр
 REFEI IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	RENCE	S EW DOWN DI ocument		/				- Inde	App
 REFEI TYPE Initiati 	RENCE	S EW DOWN D ocument :ument	LOAD ESCRIPTION	. 001 Asbestos remo	val\Change_Reque	est_Contra	ctChangeRequestV	viewReport	Арр t_0(

6. Use the Lock action button to bypass the approvals workflow, approve the document and move the document into a locked view.

- SIGNATURES							
							Ø
	Approver	1	Approver Role	1	Signature	1	Арр
	WNLOAD					\$	
TYPE	DESCRIPTION						
Initiating Document	Contract 0004 Acme	Inc. 0001 As	bestos removal\Char	nge_Request_Co	ntractChangeReq	uestViewR	eport_0(
Send for CIP Signature	e Mark CIP Signature I	Rec'd	Lock				

CHANGE EVENT

When a Change Event is processed into a Change Order:

1. Verify that all the data that has been transferred from the Change Event is accurate.

Notice that an initiating document is attached in the REFERENCE section.

2. Fill out the necessary fields then click on Save.

Upon saving, note that the currency amounts are displayed at the top of the record similar to the processing of a Change Request to a Change Order.

3. To send the Change Order to the CIPs, select **Send for CIP Signature**, which is visible after clicking **Save**.

	Labor : Construction Subcontracted Subtotal Labor + Construction Subcontracted : Material : Construction Fee Tax Other Construction Reimbursables Total : Original Contract Amount \$ Previous Contract Amount \$ Current Contract Amount \$	\$12,500.00 \$12,500.00 \$15,000.00 \$27,500.00 100,000.00 \$0.00 100,000.00 100,000.00
retains review items signatures references 1코 001 .C2101C851G Paint, Wallcover, Sealants Paint, Wallcover, Sealants Material Draft \$	615,000.00	
🗇 002 .C2101C851G Paint,Wallcover,Sealants Paint,Wallcover,Sealants Labor Draft \$	612,500.00	
SIGNATURES		ē
Approver Approver Role Signature Approved At		
▼ REFERENCES		
TYPE DESCRIPTION Titiating Document	CONTRIBUTOR DATE MARKUP?	INCLU
Initiating Document 🗋 0002 This is my change event\Change_Event_ChangeEventSummary_0002.pdf	𝔗 11/22/2019 10:18 AM No	
Send for CIP Signature Mark CIP Signature Rec'd Lock		

RECALLING A CHANGE ORDER

Once the Change Order is sent, Mayo Clinic users will be able to recall the Change Order by selecting the **Recall** button.



When a Change Order is recalled, it will take the task out of the CIPs Kahua Tasks application.

APPROVING A CHANGE ORDER THROUGH THE APPROVALS WORKFLOW

These steps concern the Mayo Clinic users only.

The Approvals Workflow process consists of multiple steps to approve the Change Order. Rules in the Approvals process determine how many approvals are needed for the Change Order.

The users involved in the Approvals process are set by a Mayo Administrator on a regional level. The specific people included in the Approvals process are assigned at the project level in the Project Application.

Once the CIP has signed the Change Order, Mayo users in the Approvals Workflow for Change Orders will receive:

DETAILS	S
Received	7/18/2018 3:48 PM
From	Paul Newman
То	Carol Bumbaca
Cc	
Subject	Please review the Change Order for SP physical reeducation room
Carol <u>Bumbaca</u> Please review a	nd approve the Change Order for SP physical reeducation room using <u>Kahua.</u>

• An email notification and Kahua Message notification in Kahua

• A task notification in the Tasks application in Kahua.

pplication in Kahua.

Note: The approval process will be done through an actionable task in the Tasks application ONLY and will be the same for all the users involved in the Approvals process.

To approve a Change Order:

1. Select the task in the Kahua Tasks application. The right pane displays the actionable task. Note the right pane will display a PDF document of the Change Order.



	CON	STRUCTIO	N CHANGE I	FORM		
	Con	Sincerio		Owner's As	signed Numbe	er: 0003
Owner's Project Number:			Date: 12/2/2	019		
Owner's Project Title:	Beau E	smonde Test	Project			
Contractor	Acme In	ıc.				
Type of Change/Request:	: Owner'	s Constructio	on Change Dir	ective		
escription: <u>The descrip</u>	tion goes he	re				
Affect to Contract Sum:	Contrac	ctor Agreemen	t Short Form			
alue of this field will be en	ntered on the	<u>Emer a sum</u> <u>e Change Ora</u> Material / Equipment /	der contract fo	<u>rm.</u>		e Omer . The
	Cube (C)	Furnishings	Salar Tar (8)	E (8)	Others (E)	T-+-1(ft)
	Subs (5)	(5)	1 NOL06 LOV (N)	Hee(N)	Unner (N)	1 0121(3)
Contract Sum			Sales Tax (5)	100(3)		\$100,000.00
Labor (S) Original Estimate or Contract Sum Previously Authorized Change Orders			Sats I ax (9)	100(0)		\$100,000.00
Criginal Estimate or Contract Sum Previously Authorized Change Orders Approved Estimate or Stipulated Sum to Date				100(0)		\$100,000.00 \$0.00 \$100,000.00
Criginal Estimate or Contract Sum Previously Authorized Change Orders Approved Estimate or Stipulated Sum to Date Adjustment per this Change New						\$100,000.00 \$100,000.00 \$100,000.00 \$27,500.00
Criginal Estimate or Contract Sum Previously Authorized Change Orders Approved Estimate or Stipulated Sum to Date Adjustment per this Change New Estimate or Contract Change Contract Change Ch						\$100,000.00 \$0.00 \$100,000.00 \$27,500.00 \$127,500.00
Contract Time: The change	e (if any) in o	lays to the Da	ate of Substant	ial Completi	on of is: <u>34</u>	\$100,000.00 \$0.00 \$100,000.00 \$27,500.00 \$127,500.00
Original Estimate or Contract Sum Previously Authorized Change Orders Approved Estimate or Simulated Sum to Date Adjustment per this Change New Estimate or Sum Orders Sum Contract Time: The change Cause of	e (if any) in a	lays to the Da	ate of Substant	ial Completie	on of is: <u>34</u>	\$100,000.00 \$0.00 \$100,000.00 \$27,500.00 \$127,500.00
Criginal Labor (S) Original Estimate or Contract Sum Previously Authorized Change Orders Approved Estimate or Stipulated Sum to Date Adjustment per this Change Contract Time: The change Cause of Change Caus	e (if any) in o Field C	lays to the Da	ate of Substant	ial Completi	on of is: <u>34</u>	\$100,000.00 \$0.00 \$100,000.00 \$27,500.00 \$127,500.00

2. Select the appropriate action

Decline

Approve – will approve the Change Order and will require the user to put the digital signature to the record

Decline- will decline the Change Order and send the task back to the initiating Mayo Clinic user. A comment will be required to justify the decline.

When **Approve** is selected, the approver is prompted to enter the PIN code in order to apply the user's digital signature to the Change Order.

tive	~		
NEW SHARE		Ť	HISTORY
View: Def	fault 👻	۵ 🖯	View
FROM	SUBJECT	DATE ASSIGNED	Approval Document
Beau Esmonde	Please review the Change Order for Bea	. 11/22/2019	- APPROVAL DOCUMENT
Kailee Olson Kailee Olson	Project: K1000104 - KO Test 3 Please re Please review the Budget Change Order	. 9/17/2019 . 9/9/2019	○ Page 1 / 2 ○ 98% ○
Beau Esmonde Beau Esmonde	Project: K1000004 - BE Test Project Ple Please review the Contract/PO for BE Te 5 filem(s)	5/14/2019 . 3/8/2019	MAYO CLINIC Image: Contract System Image: Contract System 03 Image: Contract System 03 Owner's Pi Owner's Pi Owner's Pi Owner's Pi Owner's Pi 03 Owner's Pi Owner's Pi Ow

The approval task presents the PDF document with the ability to Approve or Decline. If necessary, a Mayo user may also view the data record in the Change Orders app. If in the task, open the Change Orders app, select the record in the log and use the **View original record** button to see the contract record in full detail.

App	A Image: Constraint of the second s	Configuration Getting Started	O Users	¢ ه ×
Cont	acts Change Events Change Requests	Change Orders Pay Requ	ests Purchase Orders	Invoices
≡				∀□×
sts	HISTORY			
ntra	View			Task
S	View original record >			
1	Approval Document			
	- APPROVAL DOCUMENT			
	Page 1 / 3 😥 🔎 116%	0, C D		
	MAYO CLINIC		MAY	O CLINIC

The Status of a Change Order can be viewed by opening the Change Order Application, finding the change order in question, and looking at the "Workflow Status" showing the current status and the "Pending With" to determine who is currently reviewing the change order.

Wo Per	kflow Sta ding With	tus Sent for Approval Beau Esmonde - CBRE S	andbox						
+ ITI	MS								
							d	3	
	NO.	ACCOUNT CATEGORY	DESC	ITEM TYPE	COST STOUS	TOTAL			
ß	001	.C2101C851G Paint,Wallcover,Sealants	Paint,Wallcover,Sealants	Material	Submitted	\$15,000.00			
ß	002	.C2101C851G Paint,Wallcover,Sealants	Paint,Wallcover,Sealants	Labor	Submitted	\$12,500.00			
Oth	Other Costs Proposed Enter a summary description of all cost items of type 'Other'. The value of this field will be entered on the Change Order contract form.								

The Signatures section will display who has already approved the Change Order.

▼ SIG	NATURES			
				E)
	Approver	Approver Role	Signature	Approved At
ø	Beau Esmonde - Acme Inc.	CIP Signature	Beau Esmonde	11/22/2019 10:32 AM
₫	Beau Esmonde - CBRE Sandbox	Construction Manager	Beau Esmonde	11/22/2019 10:41 AM

Once the Change Order has been approved through all the Approvals process steps, the Workflow Status for the Change Order is set to Approved.

Cost	Status	Approved				
- REVI	EW					
Date \$	Submitte	d 11/22/2019				
Date A	Approve	11/22/2019				
Date I	Returned	to Vendor				
Comn Workf	nents Iow Stat	us Approved				
Pendi	ng With					
- ITEM	s					
						Ð
	NO.	ACCOUNT CATEGORY	DESC		US TOTAL	R)
P	NO . 001	ACCOUNT CATEGORY .C2101C851G Paint,Wallcover,Sealants	DESC Paint,Wallcover,Sealants	ITEM TYPE COST STAT Material Approved	US TOTAL \$15,000.00	ی ا

Once approved, the CIP will receive an email and a message notification in the Message app.

	Tue 7/24/2018 12:20 PM	
DO	Dev Outbox	
	New Kahua Message: The Change Order for Newman Construction on SP physical reeducation room has been approved	
Fo Yann Bou	izerand	~
The Chang	e Order for Newman Construction on SP physical reeducation room has been fully approved.	
The Chang <u>Open In Ka</u>	e Order for Newman Construction on SP physical reeducation room has been fully approved. <u>hua</u>	
The Chang Open In Ka	e Order for Newman Construction on SP physical reeducation room has been fully approved. hua This Message was sent to multiple recipients: Yann Bouzerand ; Paul Newman; Carol Bumbaca	_
The Chang Open In Ka	e Order for Newman Construction on SP physical reeducation room has been fully approved. hua This Message was sent to multiple recipients: Yann Bouzerand ; Paul Newman; Carol Bumbaca This message was automatically generated by the kahua platform. Click here to open this message in kahua.	_

REPLY REPLY ALL FORWARD VIEW										
Message De	tail									
Details Attach	ments									
- DETAILS	▼ DETAILS									
Received	11/21/2019 3:15 PM									
From	Kahua									
То	Beau Esmonde									
Cc										
Subject	Please review the Change Request for Beau Esmonde Test Project (Completed)									
Beau Esmonde. Your document is approved, all signatures have been completed.										
DOCUMENT	MARKUP? CONTRIBUTOR DATE SIZE PREVIEW STATUS COMMENTS No Files									

VIEWING AN APPROVED CHANGE ORDER

When selecting the Change Order in the Change Order app log, the Change Order displays on the right pane.



Note all approvals / signatures can be found in the table located in the Signatures section near the bottom of the Change Order.

→ SIGNATURES								
				D				
Аррі	rover	Approver Role	Signature	Approved At				
Beau Esmonde - Acn	ne Inc. CIP S	ignature Beau	u Esmonde 1	1/22/2019 10:32 AM				
Beau Esmonde - CBR	RE Sandbox Const	truction Manager Beau	u Esmonde 1	1/22/2019 10:41 AM				
🗗 Beau Esmonde - CBI	RE Sandbox Project	ct Manager Beau	LESmonde 1	1/22/2019 10:46 AM				

To see the change order in PDF format, select **VIEW**. The Change Order portable view displays in the Detail pane.

Contra	cts Change Events	Change	Requests Change Orders	Pay Requests	Purchase Orders	Invoice	3	
NEW	REPORTS MORE V	SEND VIEW	V DELETE HISTORY					र्थि २ व
≡-	View: Default 💌		Search All	•	٩) 🖯	Contract 0004 Acme Inc. 0003 The description does here	Preview
	Contract	Number	Vendor Change Order Number	Description	on Cost Stat	us Re	contract over internet internet and a part geochere	
Contra	act 0004 Acme Inc.	0003	12345	The description	goes here Approved	1		Labor \$12,500.00
Contra	act 0004 Acme Inc.	0002	081579	Asbestos remov	val Draft			Subtotal Labor + Construction Subcontracted \$12,500.00
Contra	act 0003 CBRE Sandb	iox 0001		Description goes	s here Draft			Material \$15,000.00
			3 Item(s)					Tax Tax Other Construction Reimbursable Total \$27,500.00 Original Contract Amount \$100,000.00 Previous Change Orders \$27,500.00 Previous Contract Amount \$100,000.00 Current Contract Amount \$127,500.00

Apps Project Finder Tasks	Message	s Expenses Getting Started												© @ ×
Contracts Change Events	Change	Requests Change Orders	Pay Requests Purchas	e Orders Invoice	15									
NEW REPORTS MORE V	SEND VIEV	V DELETE HISTORY												□ ≯
View: Default -		Search All	•	۵ 🖨	ContractChangeOrderCo	onstructionV	iewReport.	.pdf						
Contract	Number	Vendor Change Order Number	Description	Cost Status Re	Page 1 / 2	124	%Θ	CD)					(Ba
Contract 0004 Acme Inc.	0003	12345	The description goes here	Approved										
Contract 0004 Acme Inc.	0002	081579	Asbestos removal	Draft										
Contract 0003 CBRE Sandbo	x 0001		Description goes here	Draft	ſ	H MAY	O CLINI	C					YO CLINIC	
		3 Item(s)				0 ^r		CONS	TRUCTIO	N CHANGE I	FORM	U HEA	LIH SYSTEM	
											Owner's Ass	signed Numbe	r: 0003	
						Owner's Proje	ct Number:			Date: 12/2/2	019			
						Owner's Proje	ct Title:	Beau Es	monde Test	Project				
					1	Type of Chan	ge/Request	: Owner's	c. Constructio	n Change Dir	ective			
					р	ursuant to the	Agreement	t and Article 1	13 of the Ger	neral Conditio	ns, a change	or proposal p	er type	
					ic	dentified abov	e, the Work	is directed.			as, a enange	or proposal p	er ope	
					r	Description:	The descrip	ntion goes her	29					
							1110 40301 1	inen gete ner						
					[Affect to Co	ntract Sum	: Contract	tor Agreemen	t Short Form				
					C E	Other Costs pro alue of this fie	oposed (if a eld will be e	ny) include: _ ntered on the	Enter a sum Change Ora	nary descripti ler contract fo	on of all cos. rm.	t items of type	e 'Other'. The	
					[Material /					
									Equipment / Furnishings					
						Original	Labor (\$)	Subs (\$)	(\$)	Sales Tax (\$)	Fee (\$)	Other (S)	Total (S)	
						Estimate or Contract							\$100.000.00	
						Previously							3100,000.00	
						Change Orders							\$0.00	
						Approved Estimate or								
						Stipulated Sum to Date							\$100,000.00	
						Adjustment per this								
					-	Change New							\$27,500.00	
						Estimate or Contract								
						Num I		1					1 \$127300.00 L	

icon to open a PDF viewer from which you can save or print the PDF version of Click on the the Change Order.

ContractChangeOrderConstructionViewReport.pdf	
Page 1 / 4 ♥ 102% ♥ C D	

CHANGE ORDER IN THE WORK BREAKDOWN

While the Change Order is going through the Approvals Workflow process, the values of this Change Order are displayed in the Work Breakdown:

Apps Pr	roject Finder Tasks	Messages	\$ Expenses	Getting Started			
	Q	Visit the kStore	to explore mor	re than 50 project i	management app	os that work the way you want them to work.	Visit the kStore
Recent		Cost Management		Other	Other		
💲 Exp	oenses	\$	Expenses		AT	Approval Test App	
Lice	enses		Funding		R4P	Bid Management	
Use	ers	MA	Master Ag	reement	RpP	Bid Room	
Cor	ntacts	品	Work Brea	akdown	80 08	Community	
Cor	nfiguration	Docun	nent Manage	ement	12	Contacts	
Administra	tion	\bigcirc	Communi	cations	þ	File Manager	
Cor	mpany Profiles	Þ	Daily Rep	orts	\bigcirc	Getting Started	
Cor	nfiguration		Field Obs	ervations	22	Groups	
문) Dev	/ Logs	<i>8</i> 8	Meetings		Ł	Milestones	
Dor	main Settings		Punch Lis	ts		Projects	
De Inst	alled Apps	<u>(i</u>)	RFIs			Recycle Bin	
Lice	enses	A	Submittals	6	vw	Vendor Work Order Management	
Proj	ject Tasks	Index	Managemen	t	wo	Work Order Management	
Sha	are Manager	SM	Site Mana	igement	WP	Work Packages	
Use	ers						

The currency amount of a Change Order fully approved with the **Approved** status will be displayed in these columns:

Approved Changes - When the Change Orders as a status "Approved"

Current Commitments - this is the summation of Original Commitments + Approved Changes

Potential Committed Amount - this is the summation of Current Commitments+ Pending Commitments+ Projected Exposure

Balance to Commit (in negative) - equals the Current Budget – (Current Commitments + Pending commitments)

Budgeted to exposed (in negative) - equals Current Budget - Potential Committed Amount



SIGNING A CHANGE ORDER AS A CONSTRUCTION INDUSTRY PARTNER

Note: this section has instruction for Mayo Clinic's Construction Industry Partners (CIPs). These steps do not apply to the Mayo Clinic users.

Once the Mayo Clinic has reviewed, approved and processed the change event or change request into a change order, The CIP receives an email notification, a Kahua message notification, and a Kahua task in the Tasks application.

The actionable task displays the currency amount at the top of the right pane

Apps Project Finder Tasks Messages Expenses Cetting Started				ł ×
Active 🗸				
甘		•		¥ ¥
NEW SHARE	REASSIGN HISTORY			
Twister View: Default 🔹 🔹 🔍	Please review and sign the Change	e Order for Beau Esmonde Test Project		Task
FROM SUBJECT DATE ASSIGNED DUE DATE	, , , , , , , , , , , , , , , , , , ,			
Beau Esmonde Please review and sign the Change Orde 11/22/2019			Construction Subcontracted	\$20,000.00
1 Item(s)			Subtotal Labor + Construction Subcontracted Material Construction Fee	\$20,000.00 \$15,000.00 \$55,000.00
			Tax Other Construction Reimbursables	
			Total Original Contract Amount Previous Change Orders Previous Contract Amount Current Contract Amount	\$90,000.00 \$100,000.00 \$27,500.00 \$127,500.00 \$127,500.00
	Details Review Items References			
	- DETAILS			I
	Project Number			- 1
	Project Name	Beau Esmonde Test Project		- 1
	Contract	Contract 0004 Acme Inc.		
	Contact	Beau Esmonde		
	Contract Signatory			
	Vendor Number			
	Type of Change / Request	Contractor Change Proposal		
	Requested Date	11/28/2019		
	Number	0002		
	vendor Change Order Number	0815/9		
	Description	Asbestos removal		
	Affect to Contract Sum	Yes		
	Cause of Change	A/E Omission		
	Cause of Change - Other (Specify)	ALCONINGION		
	Cause of Change - Comments			
	Delivery Method	Stipulated Sum		
	Comments / Schedule Milestones	Here are my comments		
		I		
	Save Submit for Contract	Signatory Approval Submit for Mayo Approv	val Reject	

The Construction Industry Partners (CIPs) have 3 options:

Save	Submit for Contract Signatory Approval	Submit for Mayo Approval	Reject						

Save – will save the record and keep the task active.

Submit for Contract Signatory Approval – will submit the change order to the Contract Signatory for approval.

Submit for Mayo Approval – will sign the change order and send it back to Mayo Clinic.

Reject- Will reject the change order. A notification will be sent to Mayo Clinic. A comment is required when the record is rejected.

Upon Submit for Mayo Approval, Kahua asks to enter the PIN code to get the CIP digital signature.

Once the PIN is entered, the Document goes through the Approvals workflow process set up by Mayo Clinic.

After the Change Order has been fully approved, the CIP will receive a notification in the Kahua Messages application that the Change Order is approved.