MAYO CLINIC

| Change Event Quick Reference Guide		
November 2019	MAYO CLINIC	Prepared for the Mayo Clinic Enterprise Kahua Deployment

CHANGE EVENT APP OVERVIEW

The Change Event app will allow Mayo Clinic users to track and distribute Owner initiated changes. All or some of Construction Industry Partners (CIPs) on a project can be issued change information based on user decisions. Users can select one or more contracts on the project, send tasks, request, negotiate, and process potential contract adjustment information into a Change Order for each associated contract. The Change Event provides a way to evaluate the total cost of the proposed change across the multiple contracts. CIPs will receive direction and adjustment task requests to provide their proposed adjustments in the Kahua Task app.

The Change Event app is a sub app located in the Expenses app under the Cost Management section. Typically, this application would not be shared with CIPs
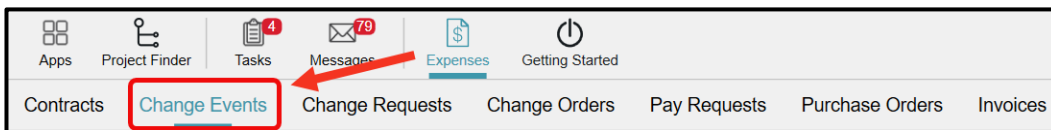
CREATING A CHANGE EVENT

To create a Change Event:

1. Click **NEW** in the Log pane. The Detail pane displays a new Change Event form.

The grey bar showing "Total" calculates cost totals upon saving the Change Event (see below)

2. Fill out the **DETAILS** section

   Note that the fields marked by an asterisk are required to be fill out by Mayo Clinic. The record cannot be saved until all required fields are filled in.

Number- Auto-populated field. This field will populate with the next sequential Change Event number.

Subject- Required text field. Enter a subject for this Change Event. An example of a subject could be change documents issued by the Design Professional.

Description- Text field. Type a Description of the Change Event. If Change Documents (such as an RFP or CCD from the design professional) are stored in file manager this field could indicate which folder they are in for CIPs to retrieve.

Change Event Status		▼
Type ✳		▼
Cause of Change ✳		▼
Originator		

Change Event Status- This is a drop down list. This field should be left ''as is''. The status will be driven by the workflow.

Type- This is required field and a drop-down list. Select the type of Change Request from these choices:

- **Change Directive** – Directs the CIP to proceed with the change and requires the CIP to provide any contract adjustments or respond with "no effect".

- **Request for Proposal** - Requests the CIP provide contract adjustments prior to the Owner deciding whether or not to proceed with the proposed change after pricing is evaluated.

Cause of Change- This is a required field and a drop-down list. Select the appropriate cause of change.

- Field Condition

- Owner Request

- Other (specify)

- A/E Omission

Originator- This is a drop-down list of names from the Contacts app. Select the name of the person or group who originated or suggested the Change Event for record purposes. This name does not appear on any subsequent contract document.

Origination Date- Auto-populated date field. Leave this blank. The origination date will be auto-populated in the workflow. Intended to indicate the date the Change Event originated.

Responsible Contact- This field will default the name of the Mayo employee initiating the Change Event. It can be replaced by clicking the "X" to remove the existing value. The drop-down list is populated with names from the Contacts app.

Note that if the name doesn't appear, the user must be added to the contact list through the Contacts app.

Due Date- This field is auto populated. It will be defaulted to be +10 days from the day of the creation of the Change Event. If necessary, type in a new date to override the default. It is intended to indicate when a response is due from the CIP.

Resolved Date- This field is manually entered when the Change Event to record the date the change event was resolved and final decision made. It does not correlate with when change orders are processed

Notes- This is text field. Type any necessary notes about the Change Event. The information only shows in Kahua and does not appear on a task or other document
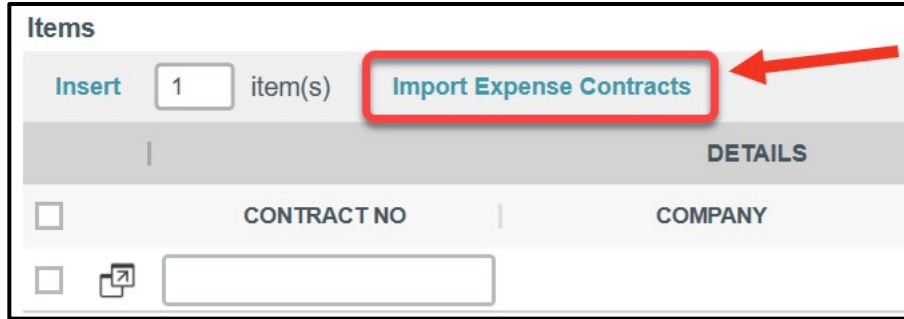
3. Fill out the **PROJECT CONTRACTS** section. This section indicates who the Change Event will be sent to.

To add contracts to be reviewed for this Change Event to the items grid, select the Import Expense Contracts button. The contract for any CIP that is impacted by the change event should be listed
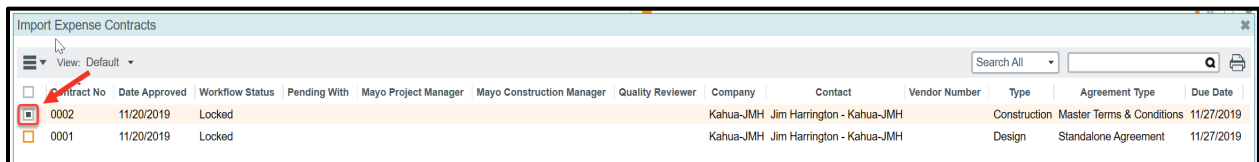
A pop-up window shows all the contracts from in this Project from the Contract app.
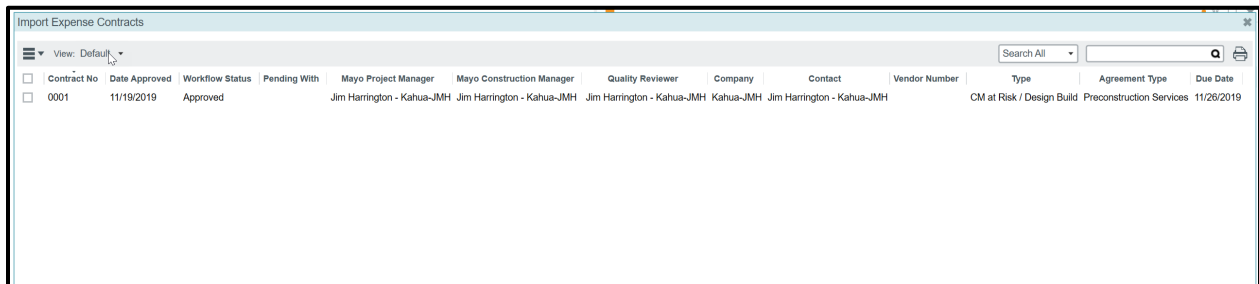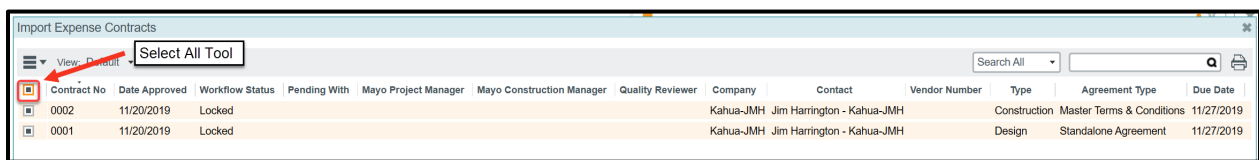

Note that contracts in the **Approved** and **Submitted** statuses will appear, but only Approved contracts may be selected. Select the contracts that the Change Event may need a response from.
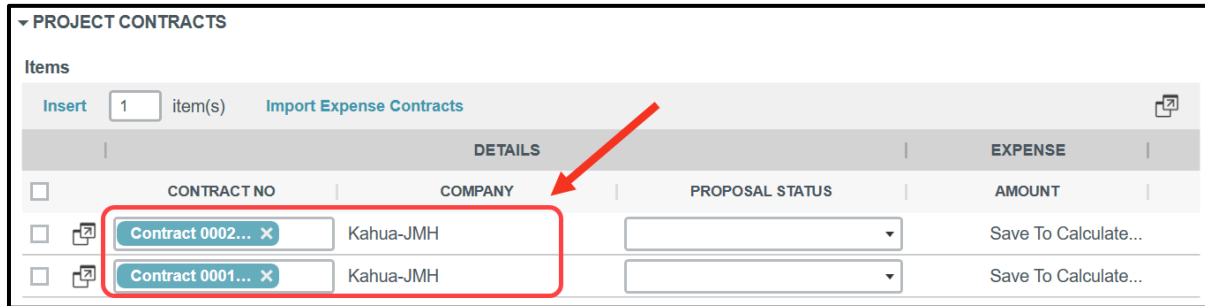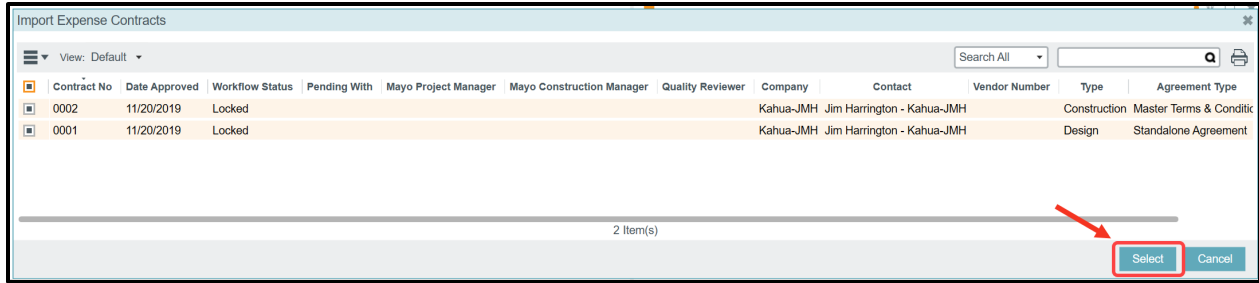
Contracts can be chosen individually by checking the box(es) or

to include all contracts, check the box at the top to select all the contracts.

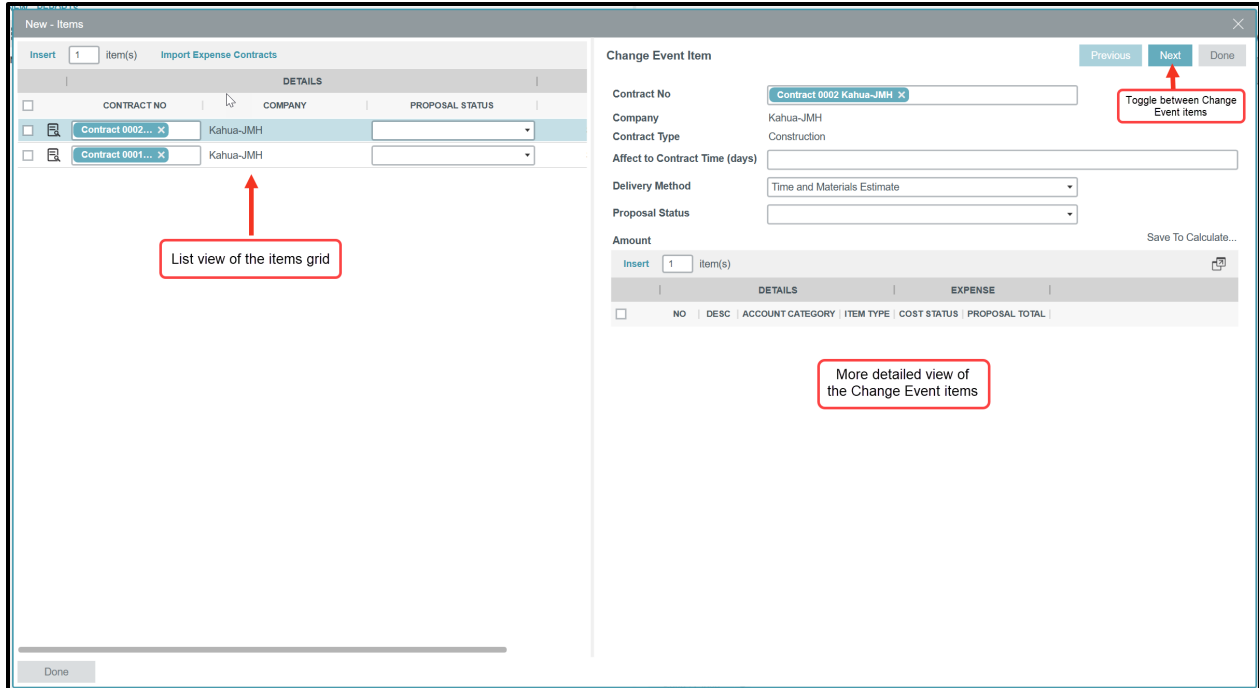Click **Select** to import the contracts into the Items Grid.

4. The **PROPOSAL STATUS** column will be driven by the Workflow. Leave blank.

Note that if the user selects the icon, it will display the detail of the line item. These fields will be filled by the CIPs when the Change Event is sent to them. **The Mayo Clinic users do not fill these fields**.
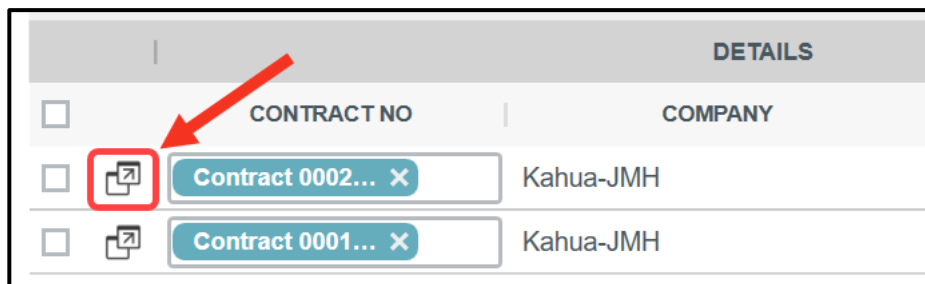
5. Use the REFERENCES section to upload documents from the computer by selecting **UPLOAD** or from the Kahua File Manager by selecting **ADD KAHUA DOC**. These references do not get sent as attachments to the task.

6. Select an option from the Save drop down to save your record.
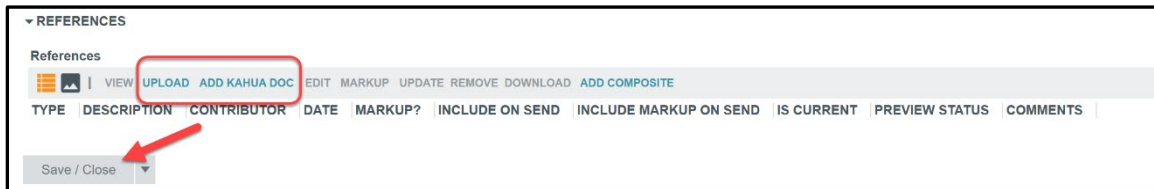
Save/ New- Will save the record and will open a blank Change Event in the Detail pane for the user to enter another Change event.
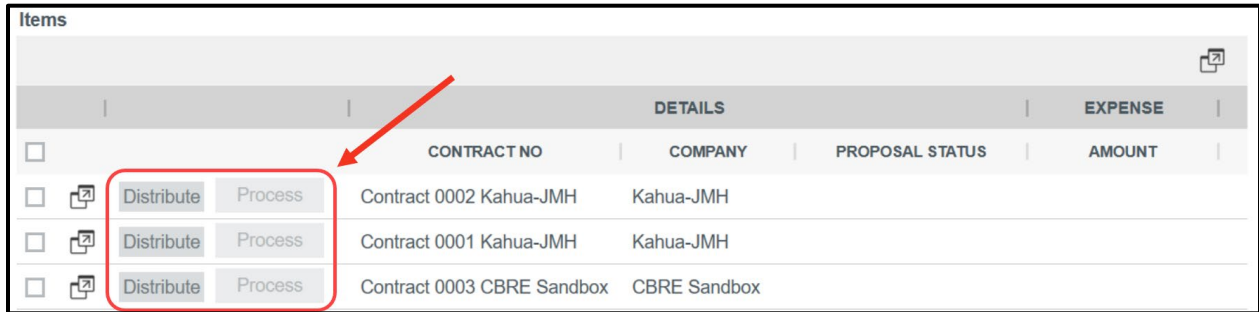
Save/ Copy- Will save the record and will open a new Change Event with the same data as in the previous one.

Save/ Close-Will save the record and close the Detail pane (on right side of screen).

Save- Will save the record but leave it open in the Detail pane for continued editing.

Upon saving, the workflow action button **Distribute** is available in front of each contract.
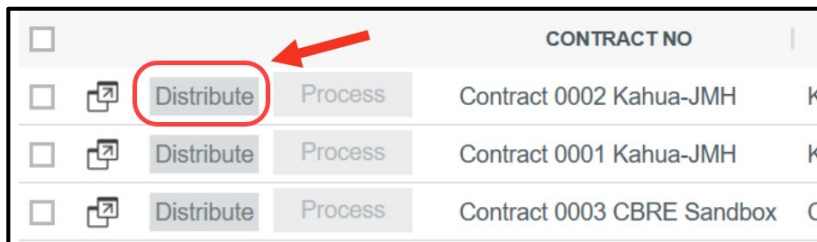
Note that the **Process** button is also here but not clickable at this step of the process.

Mayo users can send the Change Event individually by selecting the **Distribute** button next to each Contract, or

they can send the Change Event to all CIPs at the same time by checking the box(es) and select the Distribute button that appear on the top.

Once the user clicks **Distribute**, a **Recall** button appears, and the **PROPOSAL STATUS** column displays the **Proposal Requested** status.

If the users click on **Recall**, it will pull the task out of the CIPs' Tasks app and change the Recall button back to Distribute.

Note that in the **DETAILS** section, the Change Event Status field displays the **Distributed** status.

The Change Event has been sent to the CIP.

ANSWERING A CHANGE EVENT AS A CONSTRUCTION INDUSTRY PARTNER

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

When Mayo Clinic creates a Change Event, distributes it, and provides direction, then CIPs receive an email notification, a message in their Kahua Message app, and a Task Notification in Kahua.

Paul,

PXSP18C0010
SP physical reeducation room

Paul Newman - Newman Construction,
You are being sent a directive for the aforementioned project.
Please proceed per the following:

Pursuant to the Agreement and Article 13 of the General Conditions, a change is directed to occur immediately in the Work.

Please submit acknowledgement of this task within 10 working days to the Owner by providing any corresponding contract adjustments or insight as to when contract adjustments will be available.

Click this link to access your task in Kahua.

This message was automatically generated by the kahua platform. Click here to open this message in kahua.
This e-mail may contain confidential or proprietary information. If you are not the intended recipient, please advise by return e-mail and delete immediately without reading or forwarding to others.

Message Detail

Details   Attachments

Subject   Change Directive for SP physical reeducation room

Paul,

PXSP18C0010
SP physical reeducation room

Paul Newman - Newman Construction,
You are being sent a directive for the aforementioned project.
Please proceed per the following:

Pursuant to the Agreement and Article 13 of the General Conditions, a change is directed to occur immediately in the Work.

Please submit acknowledgement of this task within 10 working days to the Owner by providing any corresponding contract adjustments or insight as to when contract adjustments will be available.

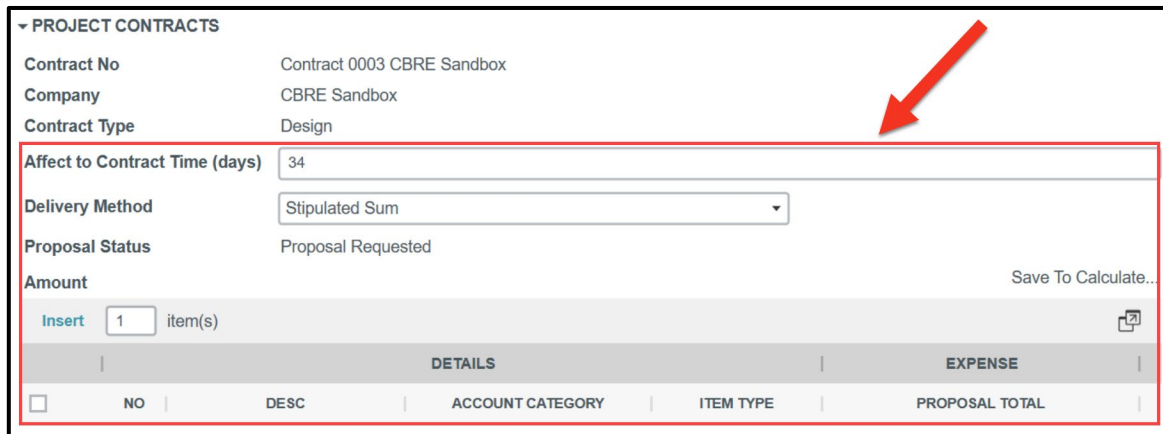Click this link to access your task in Kahua.

Tasks

The Tasks app will be used to respond to the Change Event.

1. Select the task in the **TASKS** app, the Detail pane displays the requested information.
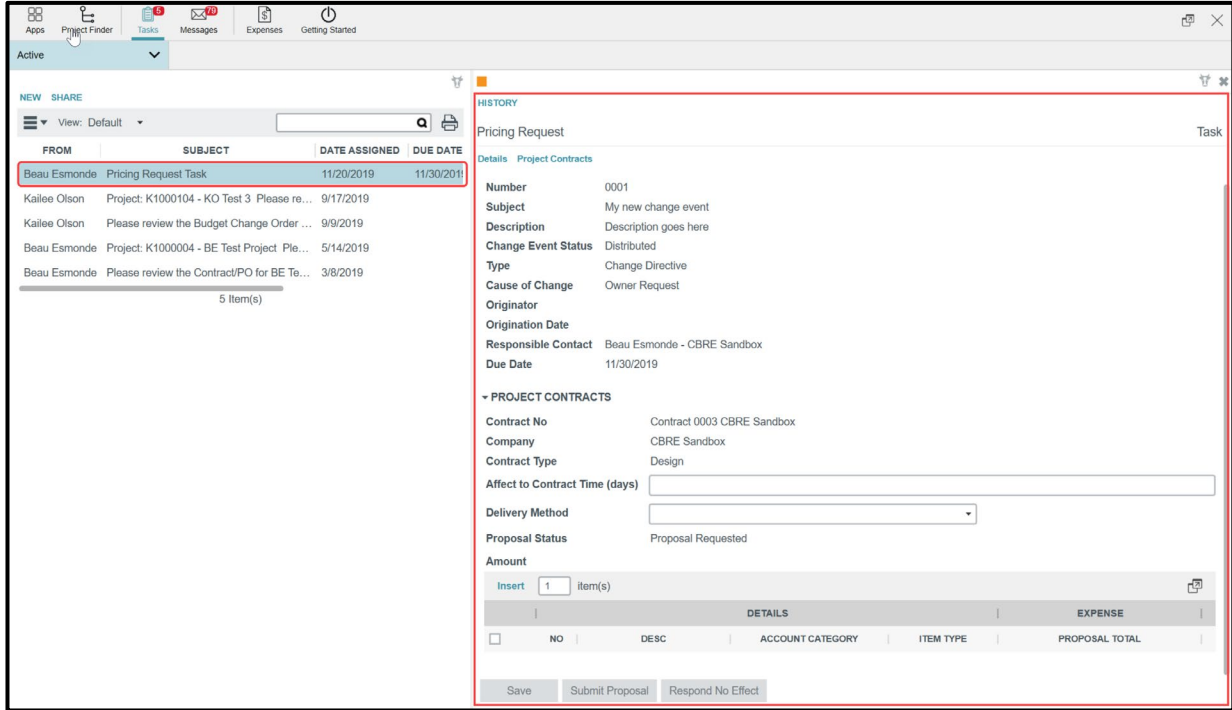
2. Fill out the editable fields.

Affect to Contract Time (days) – Numeric field. Enter the number of additional project days, if any.

Delivery Method- Dropdown list. The CIP should propose an appropriate delivery method for this Change Event and the subsequent scope of work. Mayo will review and will reject if not acceptable.

Proposal Status- This field will be driven by the workflow and should not be edited by the user.

Amount- This is the Cost Item Grid section. Indicate the work activities and their associated costs for the event.   No two dollar amounts should be on the same line. Totals (if any) will calculate upon saving the Change Event.

If there is an effect to the contract sum, insert the line items appropriate for the scope of work on the change, enter the number of lines and select **Insert**. If there is no effect to the contract sum, then proceed to the bottom and click **Respond No Effect**.

3. Enter applicable pricing line items. The **Desc**, **Account Category**, and **Item Type** fields are required as indicated by the orange asterisks. Notice the **Description** field will auto-populate based on the Account Category selected. The description may be edited as necessary. Note: The values in the Item Type drop-down list will vary based on the type of contract.


Input the proposed total cost for each cost item in the **Proposal Total** field. The total Change Event amount will be calculated when the document is saved.

The Cost Status for each line item, found when clicking the More Detail boxes, will be driven by the workflow. Leave the default value.

4. Select between **Save**, **Submit Proposal** or **Respond No Effect**

Save	Submit Proposal	Respond No Effect
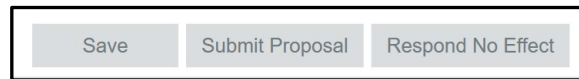
Save- Will save the record and will keep the task active in the Tasks app for future editing. It will not go back to Mayo Clinic until **Submit Proposal** is selected.

Submit Proposal- Will submit the proposal back to Mayo Clinic project team.

Respond No Effect- Will indicate Mayo Clinic that this Change Event will have no effect for the CIP through an email notification and a Kahua message notification.

Once the CIP has submitted the proposal, the proposal goes back to Mayo Clinic. From there, Mayo Clinic will accept or reject the proposal.

CIPs will receive an email and a Kahua message to let them know if it has been accepted or rejected.

ACCEPTING/ REJECTING A PROPOSAL

Note: This section has instructions for the Mayo Clinic users. These steps do not concern the CIPs.
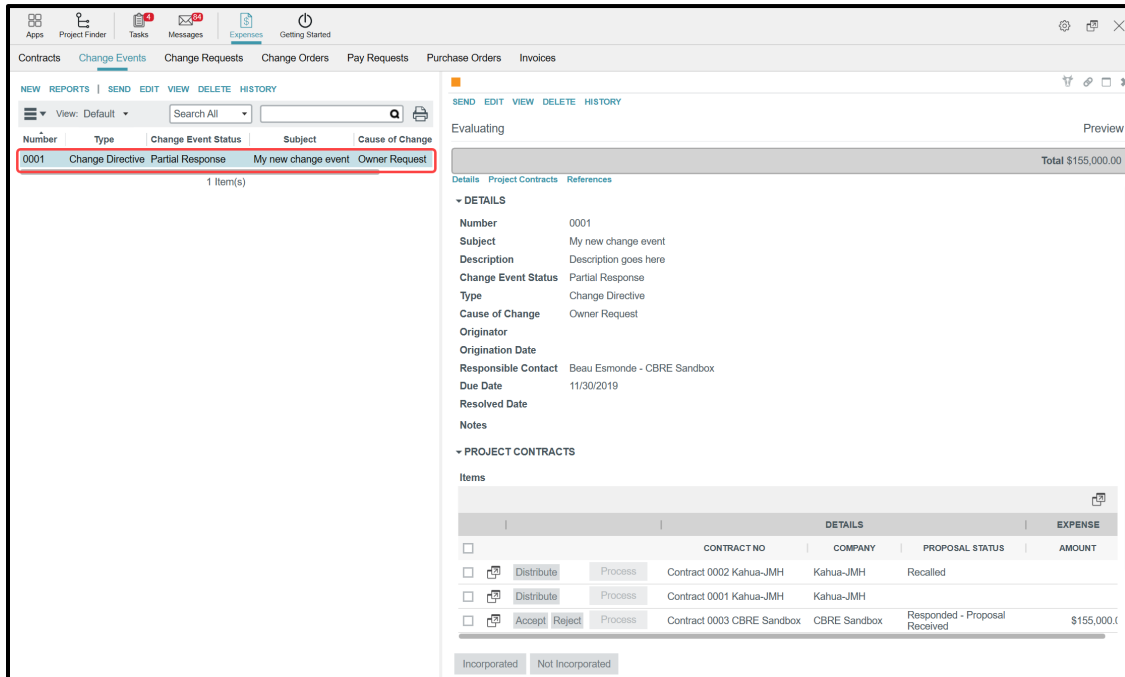
When the CIP sends back the change proposal to the Mayo Clinic, the Responsible Contact will receive an email and a Kahua message notification.
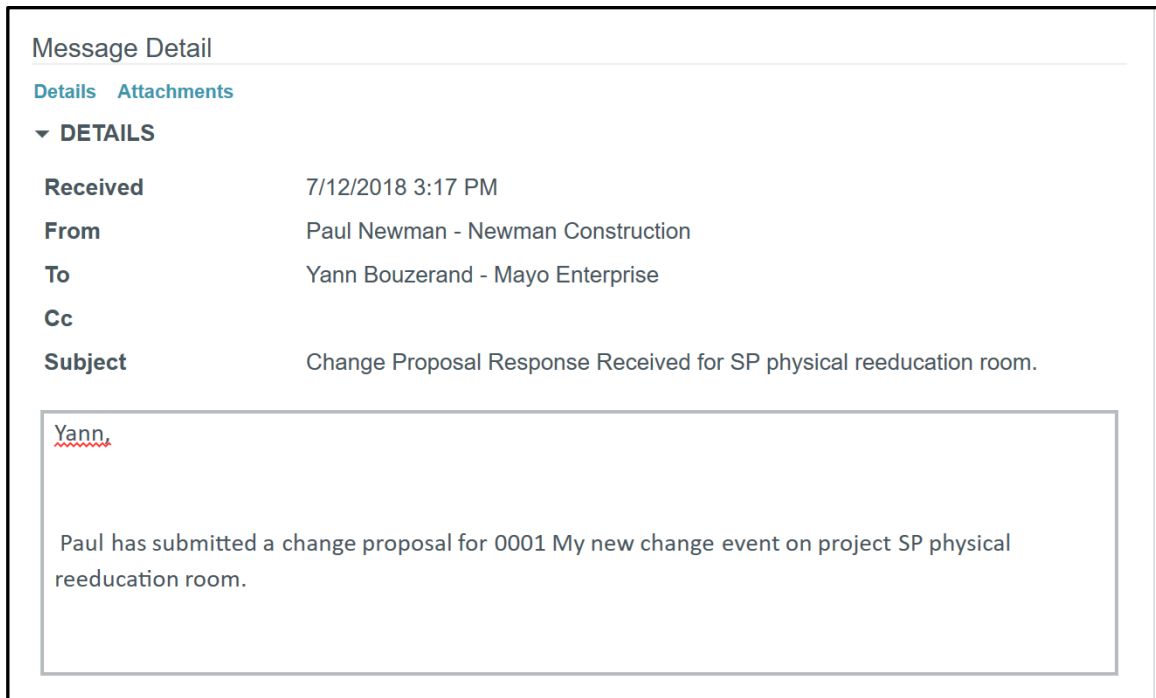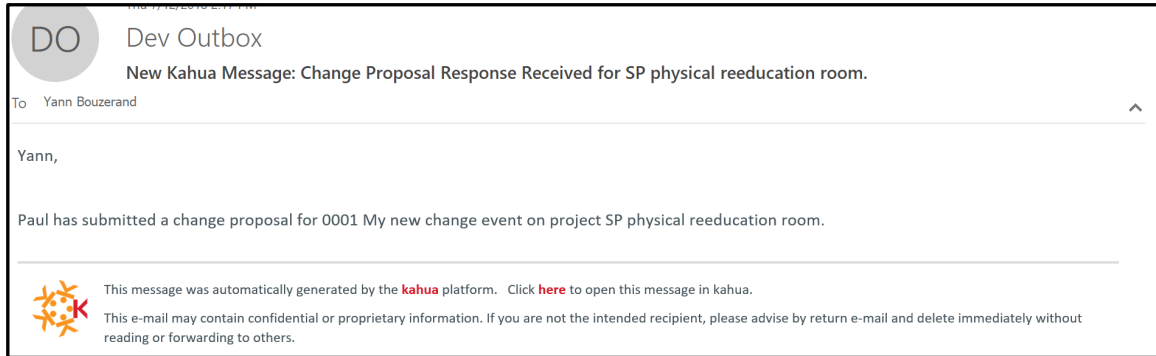
To act on the Change Proposal from a CIP:

1.   Open the Change Event app and select the record in the Log pane.

     Note that when at least one (and not all) CIP(s) submit a proposal, the Change Event Status changes to **Partial Response**.

When all the proposals from all CIPs are received, the status changes to **Evaluating**. Indicating that the event is pending Owner action.

The line items display two new buttons: **Accept** and **Reject**.

The PROPOSAL STATUS column in the line item displays the updated status: **Responded - No Effect** for one CIP and **Responded - Proposal Received** for the other CIP

Responded -No Effect means that the CIP selected the button **Respond No Effect** to say that this Change Event will not have any effect on their work.
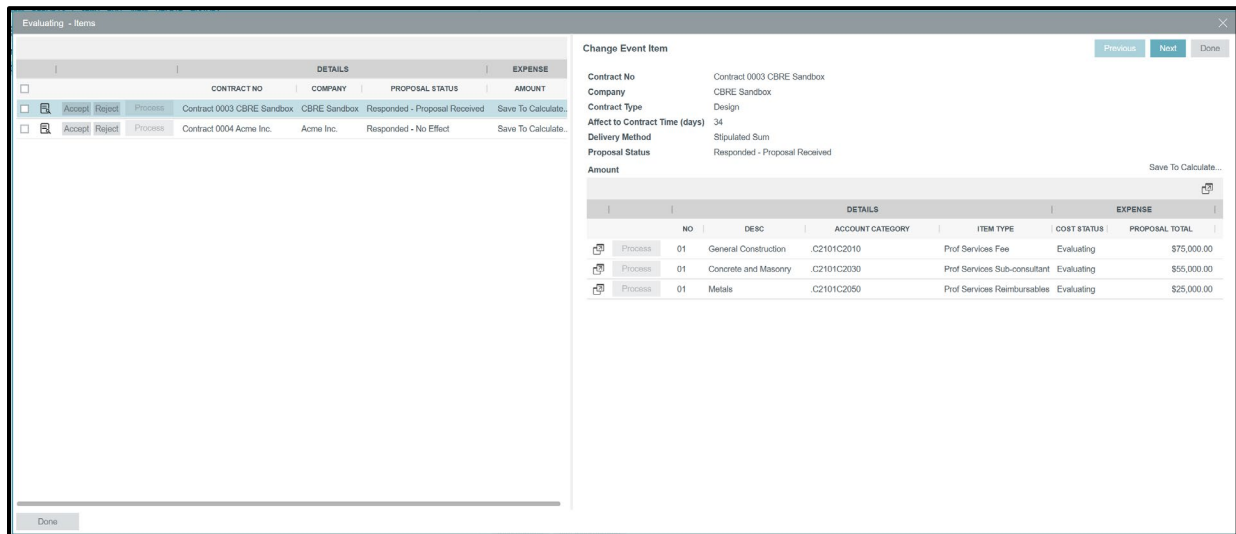
The EXPENSE column displays the total amount of the proposal.

2. Select the [icon] icon to see the details of the line item concerning the proposal change sent by the CIP.

3. Accept or Reject the proposals by selecting the appropriate button.

If accepted, a **Process** button appears to allow processing of the Change Event into a Change Order
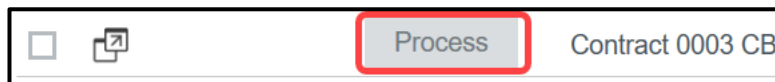
If rejected, a **Request More Info** button appears. When selected, it will send a new Task and a Kahua Message to the CIPs, inviting them to send another proposal. These steps will allow a volley for pricing for the Owner and the CIP.

Note: a comment giving direction must be entered before the Request More Info action can be performed.

4. Once the users have accepted or rejected all of the proposals, select the button **Incorporated** to lock the record and process the Change Event into a Change Order. It is important to wait until all of the Change Events have been processed before incorporating. The Incorporated button will be used for an historic project record and will aid in the searching of project history.

Note that if **Not Incorporated** is selected, the record will lock but will not display the Process button. This function would be used if the Change Event issued as a request for proposal was not executed.

Notice that the top of the page displays the total amount of the proposals that the user has accepted.

Incorporated   Preview
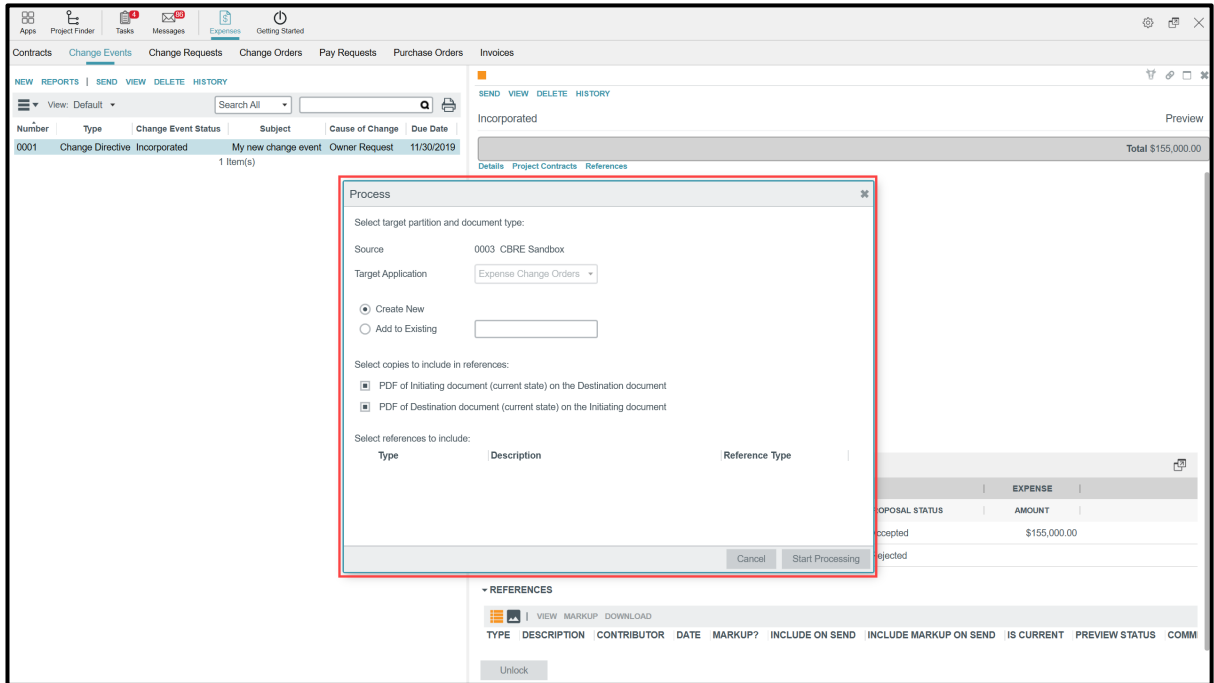
Total $155,000.00

## PROCESSING A CHANGE EVENT INTO A CHANGE ORDER

To process a Change Event into a Change Order:

1. Line items must be processed individually by selecting the **Process** button.

    Once the Process button is selected, a process window will pop up.

2. Select **Create New** if it is a new Change Event or Select **Add to Existing** if this Change Event needs to be attached to another one already created.
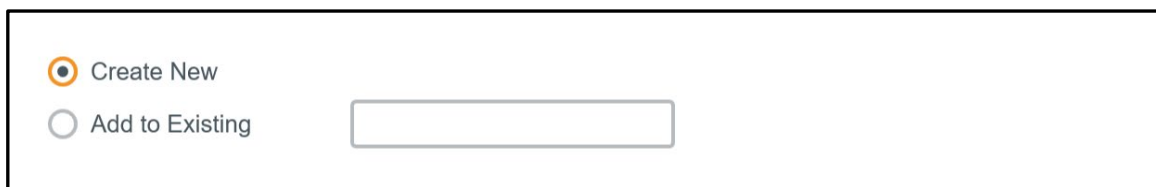
3. By default, the checkboxes under **Select copies to include in references** are checked.

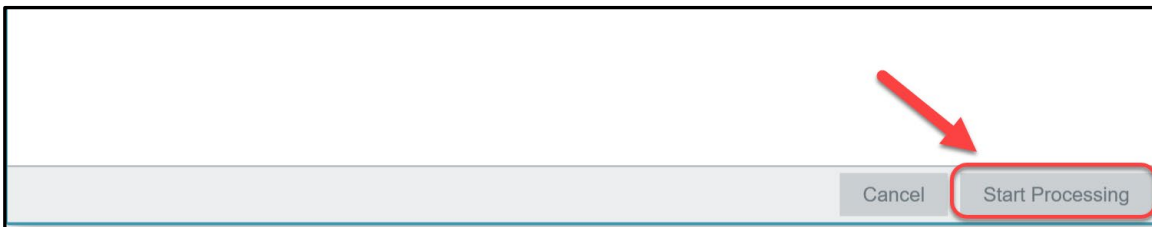4. If any references need to be included, they will appear in a list.

5. Click on **Start Processing** to process the Change Event into a Change Order.

Kahua will automatically switch from the Change Event app to the Change Order app and copy the data into a new Change Order.

Now that the Change Event has been processed as a Change Order, Mayo Clinic users will send the Change Order to the CIPs to get their signature, then the record will go through the Delegation of Authority (DOA) approval process.

DOA is a configurable approval process with limits based on the Change Order amount. Depending of the amount, the Change Order will go through one or more Mayo approvers.
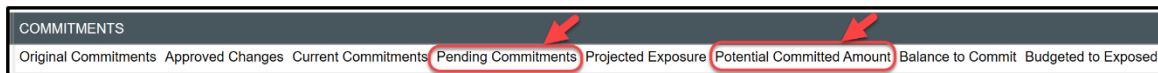
See the Change Order Quick Reference Guide for more information.
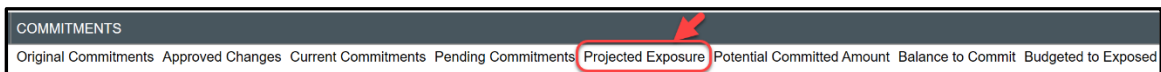
CHANGE EVENT IN THE WORK BREAKDOWN

While the Change Event is going through the DOA process, the values of this Change Event are displayed in the Work Breakdown:
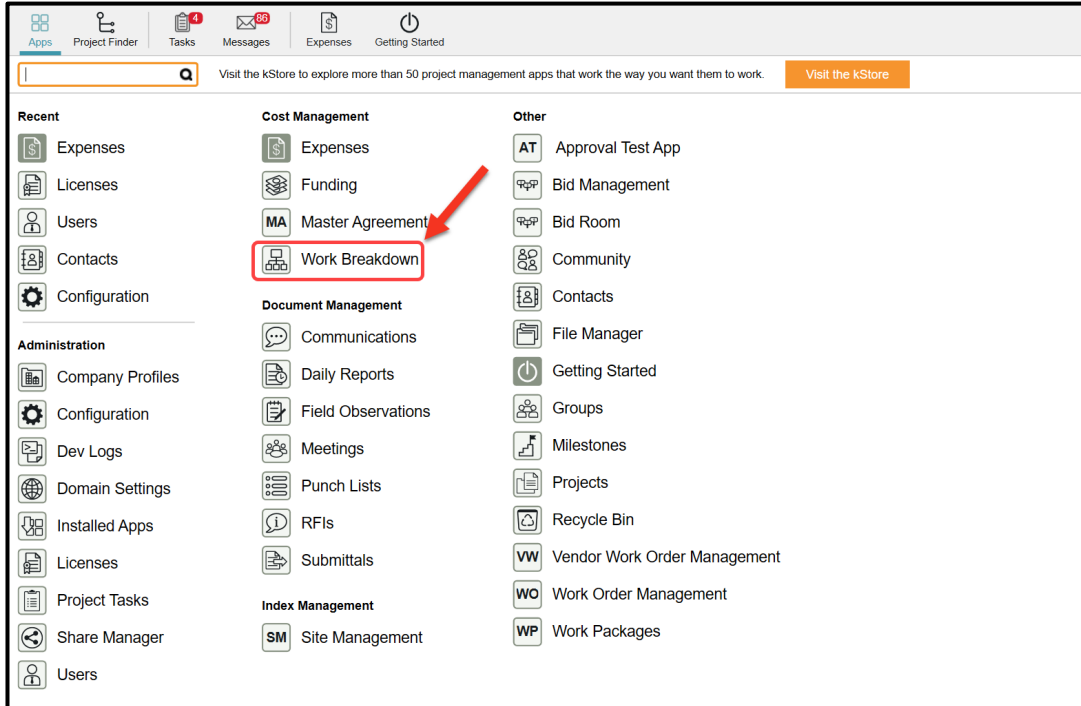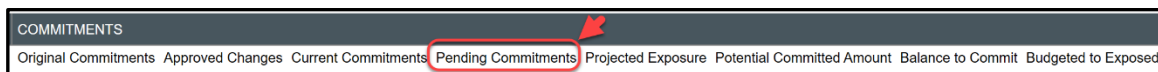

Change Event line items in the **Responded** status will appear in the **Pending Commitments** column and the **Potential Committed Amount** Column**.**

Change Event record in the **Complete Response** Status will appear in the **Project Exposure** column.

Change Event record in the **Incorporated** status will appear in the **Pending Commitments** column.

Note: Change Event record in the **Not Incorporated** will not appear in the Work Breakdown.