Design Contract Creation Quick Reference Guide

September 2018

Prepared for the Mayo Clinic
Enterprise Kahua Deployment
CONTRACTS OVERVIEW

The Contracts app will allow users to create new construction or design contracts directly in Kahua and route them through approval. A contract is tied to a project and a project may be associated with many contracts. Mayo users initiate contracts and Mayo Construction Industry Professionals (CIPS) and other Mayo users participate in the contract workflow. The contract workflow is made up of these primary steps:

A Mayo user creates a contract with basic information about the contract then sends it to a CIP.

The CIP provides input on the Cost Item Grid and can enter comments then sends the contract back for review and approval.

The contract is routed through an approval process based on the Delegation of Authority (DOA) rules for the contract type and contract value during which signatures are applied to the contract.

The workflow supports returning contracts for updates/changes before final sign off. When a contract has been signed and finalized, the signed/executed contract is locked in the Contracts app and a PDF version complete with all legal contract language and all signatures is rendered. This PDF version serves as the executed legal contract and is tied to the contract record. Each party involved will be managing the review, approval or rejection of the Contract through actionable tasks in the Kahua Tasks app.

The Contracts app is in the Expenses app as a sub-app under the Cost Management Section.
**CREATING A DESIGN CONTRACT**

A contract has several sections. Each section is marked by a title in all caps and with an action button to the left of the title that allows you to expand or collapse the view to the fields in that section. Sections are expanded by default when in edit mode in a contract.

Each contract type has the same sections. Some sections have the same fields (and instructions) across all contract types. In other sections, the fields may change depending on what type of contract is being edited. “System fields” are populated by the program and “user fields” are manually entered.

<table>
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<th>Field Properties</th>
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<tr>
<td>Details</td>
<td>Same for all contracts</td>
<td>x system fields</td>
<td>Mayo User</td>
</tr>
<tr>
<td></td>
<td>x user fields</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contracted Party</td>
<td>Same for all contracts</td>
<td>x system fields</td>
<td>Mayo User</td>
</tr>
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<td></td>
<td>x user fields</td>
<td></td>
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<tr>
<td>Agreement Details</td>
<td>Vary by contract type</td>
<td>x system fields</td>
<td>Mayo User</td>
</tr>
<tr>
<td></td>
<td>x user fields</td>
<td></td>
<td></td>
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<tr>
<td>Design</td>
<td>Vary by contract type</td>
<td>x system fields</td>
<td>Mayo User</td>
</tr>
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<td></td>
<td>x user fields</td>
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<td>Vary by contract type</td>
<td>x system fields</td>
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<td>user fields</td>
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<tr>
<td>Design Scope &amp; Milestones</td>
<td>Same for all contracts</td>
<td>system fields</td>
<td>Mayo User</td>
</tr>
<tr>
<td></td>
<td>x user fields</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review</td>
<td>Same for all contracts</td>
<td>x system fields</td>
<td>System*</td>
</tr>
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<td></td>
<td>* user fields</td>
<td></td>
<td></td>
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<tr>
<td>Items</td>
<td>Same for all contracts</td>
<td>** system fields</td>
<td>CIP**</td>
</tr>
<tr>
<td></td>
<td>x user fields</td>
<td></td>
<td></td>
</tr>
<tr>
<td>References</td>
<td>Same for all contracts</td>
<td>system fields</td>
<td>Mayo User, CIP</td>
</tr>
<tr>
<td></td>
<td>x user fields</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| * System generated values may be overridden by Mayo Users in certain situations 
** Completed by CIP but there are some cases when Mayo Users may complete this. |
GUIDE TO INSTRUCTIONS FOR CREATING DESIGN CONTRACTS

This QRG is divided into sections. You will use sections specific to the type of contract you are creating. The sections in this document follow the same order as the sections in the contract form.

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<th>QRG Section</th>
<th>Applies to these contract types</th>
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<td>Creating a Design Contract (All Types)</td>
<td>Start with this section to create all design contract types. It includes instructions for these contract sections: Details, Contracted Party, Agreement Details.</td>
</tr>
<tr>
<td>Starting a Design Short Form Contract</td>
<td>Follow instructions in this section when creating a Design Short Form agreement type. It provides instructions for the Agreement Details, Design, and Compensation Type, Design Scope &amp; Milestones sections of this contract type.</td>
</tr>
<tr>
<td>Proceed to the Completing a Design Contract Section next to complete the remaining sections of the contract.</td>
<td></td>
</tr>
<tr>
<td>Starting a Master Terms &amp; Conditions Design Contract</td>
<td>Follow instructions in this section when creating a contract that accompanies a Master Terms &amp; Conditions agreement and may be one of four types:</td>
</tr>
<tr>
<td></td>
<td>Stipulated Sum</td>
</tr>
<tr>
<td></td>
<td>DPE Estimated Max Sum</td>
</tr>
<tr>
<td></td>
<td>DPE NTE</td>
</tr>
<tr>
<td></td>
<td>Reimbursement</td>
</tr>
<tr>
<td></td>
<td>The section provides instructions for the Agreement Details, Design, and Compensation Type, Design Scope &amp; Milestones sections of these contract types.</td>
</tr>
<tr>
<td></td>
<td>Proceed to the Completing a Construction Contract Section next to complete the remaining sections of the contract.</td>
</tr>
</tbody>
</table>
## Completing a Design Contract (All Types)

This section provides instruction for the remaining sections of all construction type contracts:

- Review
- Items
- References
CREATING A DESIGN CONTRACT (ALL TYPES)

To create a Design Contract:

1. Use the Navigation Bar to go to the Project for which you are creating contracts.

2. Navigate to the Expenses Application, select Contracts then New. The Detail pane opens to the right.

The Contract totals are displayed at the top of the Detail pane. The amounts are calculated and displayed in this area by clicking Save at the bottom of the window after values are entered in the cost item grid.
3. Fill out the DETAILS section.

- PROJECT NUMBER/ NAME/ DESCRIPTION - This information will be auto-populated and not editable. The data is taken from the Project information entered in the Project Application.

- ADDITIONAL LOCATION NOTES - The Project defines the site, campus, building, and floor for the project and its contracts. The campus and building are encoded in the project name unless overridden at time of creation. The contract level Location field will be used to summarize location information and to provide more detail as needed. The full location path (campus, building, floor, additional location notes) will appear on the contract view.

- CONTRACT NO - The field is auto-populated with the next sequential contract number in this project. The sequential numbering applies across all contract types. For example:

The Contract No field is editable to allow users to assign a specific contract number which must be unique within this project.

- DATE - Current date is displayed by default but may be changed.

- STATUS - The initial status defaults to “Draft”. When the contract is sent to the construction industry partner, the status will be driven by the workflow and will be auto updated.

When a contract is created through Kahua for a non-Kahua user, the creator of the contract will be allowed to change the status from “Draft” to “Approved” manually which will push the dollar amounts from the cost grid into the Work Breakdown application. Note that “Status” and “Workflow Status” are different data fields. When “Status” has been manually set to “Approved” the “Workflow Status” will still say “Active”.
**Mayo Project Manager** - The field is auto-populated. It is defaulted from the Project information.

**Contract Quality Reviewer** – This field is auto-populated and is defaulted from the Project information.

**Owner** - This is a dropdown field. Select the name of the legal entity company for this contract.

**Owner Contact** – The person that will be Mayo’s contact for this contract. This person may be associated with a different Mayo entity than the value in Owner. This person does not fill any information on the contract.

**Owner Address** - Field is auto-populated and non-editable. The data is related to the contact entered in the Owner Contact field. If the address doesn’t appear, it means that the contact didn’t fill his profile with the company address.

**Owner’s Representative(s)** – This field is used if there are additional Owner’s Representatives with contractual authority in addition to the Project Manager role or the Construction Manager role. The name will appear in the contract but doesn’t have to be part of the Delegation of Authority (DOA). A signature will not be required on the contract by this individual. Enter one or many names/titles in the format:

Name1 (Title), Name2 (Title), Name3 (Title)

4. Fill out the CONTRACTED PARTY section.

**Company** - Select the name of the company of the contracted party.
Contact - Select the contact from the company chosen above. Click in the field to see a list of contacts for this company. This is the person who will receive the contract in workflow who will fill out the Cost Item Grid and sign the contract during approval workflow.

Note that if you complete the Contact field before the Company field, the Company field will be automatically filled with the Contact’s company name.

Phone/ Fax/ Address/ Vendor Number – These fields are non-editable and auto-populated. The data is related to the contact entered in the Company field. If data does not appear in a field, it means that field is empty in the company record.

5. In the AGREEMENT DETAILS section, start by selecting Design in the Type field.

6. Agreement Type - Select one of the two Agreement Types from the drop-down list. What you enter into this and other fields in the Agreement Type section have an effect on what fields are available in the next sections of the contract form. Fields that are appropriate for the type of contract selected are displayed. There are two agreement types:

Standalone Agreement: When Standalone Agreement is selected, the next field, Compensation Type, presents just one type of contract, the Professional Services Agreement Short Form.

7. Work Retainage Rate - (also known as Owner’s Retainage Rate) this rate will populate the Pay Request application as a default. It will populate a field of the design contract but does not populate a field on the construction contract. For construction contracts the information will need to be shared with the CIP when establishing the relationship.

8. Due Date – Put in a date by which the CIP should complete and return the contract.
Click here for instructions for the Design Short Form Contract

Click here for instructions for Master Terms and Conditions Design Contracts
STARTING A DESIGN SHORT FORM CONTRACT

For Design type contracts, there is only one Standalone Agreement type – the Professional Services Agreement Short form. After filling out the Details and Contracted Party sections of the contract form, fill out the Agreement Details as follows for a Standalone agreement type.

1. Select Design from the drop down list in the Type field.

2. Select Standalone Agreement from the drop down list in the Agreement Type field.

3. Note that the drop down list in the Compensation Type field has only one type. Select Professional Services Agreement Short Form.

4. Enter a decimal value in the Work Retainage Rate field.

5. Complete the Due Date field. This is the date by which the owner requests the contract returned from the contractor.

   NOTE: The fields below the Agreement Details section change to those appropriate to a Standalone Professional Services Agreement Short Form.

6. Fill out the Commencement of Work field in the DESIGN section.

7. Fill out the multiline text fields in the COMPENSATION TYPE section.
8. Fill out the multiline text field in the DESIGN SCOPE & MILESTONES section and select a termination date for the contract.
STARTING A MASTER TERMS & CONDITIONS DESIGN CONTRACT

There are four types of Master Terms & Conditions contracts. After filling out the Details and Contracted Party sections of the contract form as documented above, fill out the Agreement Details section to specify the type of contract you’re creating.

1. Select Design from the drop down list in the Type field.
2. Select Master Terms & Conditions from the drop down list in the Agreement Type field.
3. Note that a new field, Master Terms & Conditions appears. Use the drop down list to select the Master agreement that governs the contract you are creating. The list is filtered to only show the Master agreements appropriate for the location of this contract.
4. When the Agreement Type is set to Master Terms & Conditions, the next field, Compensation Type, requires you to select from one of these four options:
   - Stipulated Sum
   - DPE Estimated Max Sum
   - DPE NTE
   - Reimbursement

5. Enter a decimal value in the Work Retainage Rate field.
6. Complete the Due Date field. This is the date by which the owner requests the contract returned from the contractor.

**DESIGN, COMPENSATION TYPE AND DESIGN SCOPE & MILESTONE SECTIONS**

After completing the Agreement Type section, the fields in the following sections adjust to those appropriate for the Compensation Type selected.

The following table maps out the fields and data types per field in DESIGN, COMPENSATION TYPE, and DESIGN SCOPE & MILESTONES sections for each of the four contract types. This information is used to populate the portable view contract forms for each contract type. The chart references these field types:

- **CALCULATED** – the value of the field will be calculated on save from data in the cost item grid. You cannot enter data into a calculated field directly.

- **DECIMAL** – a decimal value.

- **SINGLE LINE TEXT** – enter a string of unformatted text without any line breaks; the portable view document will handle the formatting (font, point size) of data entered in a single line text field.

- **MULTI LINE TEXT** – a text field that allows multiple lines by pressing ENTER at the end of each line. The portable view document will handle the formatting (font, point size) of data entered in a multi-line text field. Line endings used in this field will be honored in the portable view document.

- **RICH TEXT** – a text field with rich controls for formatting large blocks of text. The formatting controls appear above the box and have such items as numbered or bulleted lists, font selections and more. The formatting used in this field will be honored in the portable view document. The Mayo convention is to keep the font to Times New Roman, 10 pt. Ensure you’ve selected the font before entering or pasting text into the field. A rich text type field looks like this:

![Rich Text Field](image)

- **CURRENCY** – enter US currency values in this field.
DROP DOWN LIST – use the down arrow to see and select the valid entries for this type of field.

**A Note About the Text Fields of the Design Contract:** There are several long text fields to be filled out. These can be filled out by copying the text from a Word document (in 10 point Times New Roman font) and pasting into the text fields. The Appendix at the end of this document contains text you can copy and paste into these fields.

This table is a summary of the fields in a design contract that are presented depending on the Compensation Type selected.

<table>
<thead>
<tr>
<th>Field</th>
<th>Stipulated Sum</th>
<th>D.P.E Estimated Max Sum</th>
<th>D.P.E NTE</th>
<th>Reimbursement</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Design Section</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Estimated Reimbursable Charges</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td></td>
</tr>
<tr>
<td><strong>Compensation Type Section</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A Stipulated sum of</td>
<td>calculated</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>D.P.E</td>
<td>NA</td>
<td>decimal</td>
<td>decimal</td>
<td>NA</td>
</tr>
<tr>
<td>A multiple of D.P.E. of estimated max sum</td>
<td>NA</td>
<td>calculated</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>A multiple of D.P.E. of not to exceed</td>
<td>NA</td>
<td>NA</td>
<td>calculated</td>
<td>NA</td>
</tr>
<tr>
<td>A reimbursement based on</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>text</td>
</tr>
<tr>
<td><strong>Design Scope &amp; Milestones</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Design Disciplines</td>
<td>rich text field (format determined by values in the field)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phases</td>
<td>rich text field (format determined by values in the field)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planning/study/design services</td>
<td>rich text field (format determined by values in the field)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction phase services</td>
<td>rich text field (format determined by values in the field)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interior design services</td>
<td>rich text field (format determined by values in the field)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special Owner's systems</td>
<td>rich text field (format determined by values in the field)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Design Professional Notes</td>
<td>multi line text field (format determined by portable view)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schematic design and Owner's budget approval</td>
<td>single line text field (format determined by portable view)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction document complete</td>
<td>single line text field (format determined by portable view)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction commencement</td>
<td>single line text field (format determined by portable view)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction complete</td>
<td>single line text field (format determined by portable view)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Estimated Construction Cost</td>
<td>currency field</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Estimated Furniture Cost</td>
<td>currency field</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Estimated NTE Transportation Cost</td>
<td>currency field</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Owner has its own Standard Specifications</td>
<td>drop down list</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>---------------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Owner had design guidelines</td>
<td>drop down list</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
COMPLETING A DESIGN CONTRACT (ALL TYPES)

There are three more sections to the Design type contract: Review, Items and References.

1. REVIEW section - This section is comprised of information captured as the contract goes through workflow. No user input is required in this section. If a value is input, it will be overwritten during workflow.

   Contracts with Parties Outside the Kahua Community – The only time a user may enter data in the fields in the Review section is when the contract is being manually completed and finalized to record a contract with a party that is not in the Kahua community. In this situation, fill in the dates of record for the contract and save the contract. The contract amounts will be approved and processed into Work Breakdown. The work flow status will still show “Active” and the button for “Submit to CIP for Signature” will still be available, but no further action is required.

2. ITEMS section

   Below is a list of the Design Account Categories.

   The ITEMS section is also called the Items Grid or Cost Items Grid. As a Mayo user, when creating the contract, you may fill out the contract information but will not enter values in the grid. The Contracted Party will complete the Items Grid as the contract goes through workflow.

3. REFERENCES section
Add any necessary documents from your computer by selecting UPLOAD or from your Kahua File Manager by selecting ADD KAHUA DOC.

**SENDING THE CONTRACT INTO WORKFLOW**

Select SAVE if you want to save the record and come back to work on it later before sending the contract or select Submit for CIP Signature to send the contract to the Design Professional.

Note that if individuals are missing in the DOA workflow, the window below will pop up:

The user will have to contact a Project Manager or Mayo personnel to add or modify individuals in the PROJECT WORKFLOW ROLES section in the PROJECTS application or the DOA matrix. Not all partitions in Kahua or regions will have the same titles.

Once the contract is sent, the Design Professional will receive notification of the request to complete the contract. There are two notifications: a Kahua Task Notification and an email notification.

Note that the Design Professional will respond to the request using the Task app. Within the Task app, the Design Professional can see details of the contract but can only edit certain items: The Items Grid, the Comments section, and can attach reference documents. Other fields will not be editable by the Design Professional.
RESPONDING TO A DESIGN CONTRACT REQUEST AS A THIRD PARTY

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

When a design contract request is sent from Mayo Clinic, the Design Professional receives an email notification with a link to access the task in Kahua:

![New Kahua Message](image)

If the Design Professional is logged into Kahua, note that the Task icon will have a red number indicating there are new tasks to respond to. The Design Professional will also see a pop-up message in the lower right corner of the screen as an alert for the new task.

To answer a Design Contract Request as a Design Professional:

1. Click on Tasks to open the Tasks app. The new task will appear in the list in the Log. Select the task to open it in the Detail pane.
The Mayo Clinic Requestor who created the task has entered information about the proposed contract. The information entered by the Requestor is visible to the Design Professional, but is not editable by the Design Professional.

The Design Professional can take these actions on the Contract:

- Complete the Items Grid by entering labor, materials, work and other types of expenses
- Enter a comment
- Attach reference materials
- Save the task
- Send the task to the Mayo Clinic Requestor

2. Scroll down to the ITEMS section to fill out the details of work

3. The ITEMS section defaults to one line item. Use the Insert function to add additional lines. For example, put a “2” in the box then click Insert to add two more lines. Note if you add more lines than you need, delete the unused ones as blank lines will produce an error upon saving the contract.
Below is a list of the Design Account Categories.

<table>
<thead>
<tr>
<th>Category</th>
<th>Scope</th>
<th>Activity</th>
<th>Account Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Fees</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Architectural Fees</td>
<td>Architectural/Engineering Fees</td>
<td>C0220</td>
<td></td>
</tr>
<tr>
<td>Reimbursable</td>
<td>Reimbursable</td>
<td></td>
<td>C0230</td>
</tr>
<tr>
<td>Engineering</td>
<td>Engineering</td>
<td></td>
<td>C0300</td>
</tr>
<tr>
<td>Testing</td>
<td>Geotechnical site</td>
<td></td>
<td>C0330</td>
</tr>
<tr>
<td>Commissioning</td>
<td>Commissioning</td>
<td></td>
<td>C0340</td>
</tr>
<tr>
<td>Preconstruction Services</td>
<td>Preconstruction Services</td>
<td>C0330</td>
<td></td>
</tr>
<tr>
<td>Special Inspections</td>
<td>Special Inspections</td>
<td></td>
<td>C0340</td>
</tr>
</tbody>
</table>

4. Fill out each column

**DESC** - This is a required field. Type the description desired.

**ACCOUNT CATEGORY** - This is a required field with a drop down list of available entries. Select the proper account category for the line item from the drop-down list or by typing in some characters of the category type then select from the list of matching items that is presented. The entry in this field dictates where the expense will be displayed in the Work Breakdown.

**STATUS** - This is a non-editable field, read only. It will be driven by the workflow moving forward and will be automatically updated.

**ESTIMATED LABOR HOURS** - This is a numeric field. Enter labor hours. Decimal points may be used.

**LABOR** - This is a currency field. Enter the dollar value of the labor cost.

**MATERIAL** - This is a currency field. Enter the dollar value of the material costs.

**OTHER TYPE** - This is a drop-down list containing the types of expenses that will be entered in the next field, the Other Amt field. Select one type from four choices: **Subcontracted, Fee, Tax and Other**.

![OTHER TYPE dropdown](image)

**OTHER AMT** - This is a currency field. Enter the value for the expense type identified by the value in the Other Type field.

**TOTAL** - This is a calculated field, not editable by the user. It displays the sum of the currency fields on this line item.
Note: Clicking the Detail Icon at the left of each line item presents a larger, more detailed view of the entry. It is an optional way to complete an entry in the Items Grid.

When entering Reimbursable the Account Category “.C1101C0250 Reimbursable” must be selected along with Other Type “Other” and the Other Amount filled in.

5. Fill out the comments section if necessary.

6. Add any documents from the computer by selecting UPLOAD in the REFERENCES section.

7. Click Save to save the record. This saves the record but does not send it into workflow. Using Save allows you to fill out the Items Grid in more than one editing session and also allows you to see the current total of the expense information entered.

   Upon saving, the summary tab at the top of the detail view will display a summary of the expenses subtotaled by type of expense. This appears at the top of the contract record.

8. After entering all data in the Task, select Submit for Approval to send the contract into workflow and back to the Mayo Clinic Requestor for review.
When submitting the contract into workflow, an Add Signature window pops up. Enter the PIN you selected when you set up your Kahua contact record in Account Settings. This will record the signature and a time stamp to the contract record.

The task is now complete and will disappear from the task list in the Log. The status of the contract is set to Sent for Approval.

The contract will be sent back to the Mayo Clinic Requestor. If the Requestor determines that the Design Professional response addresses the request, the contract will be sent into workflow again to obtain the necessary approvals and signatures.

The Mayo Clinic Requestor also has the option to reject the contract which triggers a workflow action to send the task back to the Design Professional.

**RESPONDING TO A REJECTED CONTRACT AS THE DESIGN PROFESSIONAL**

The Design Professional will receive an email with comments left by the Mayo Clinic Requestor.
The Design Professional will also receive a message notification:

The Design Professional will also receive a task notification. Note that it will display the Workflow Status which in this case is **Rejected.** The reason for rejection will also be listed under the Comments section.

The Design Professional modifies the contract in response to the Mayo Clinic Requestor’s comments, then sends the contract back into the approval workflow by selecting **Send for Approval.**
**IF THE CONTRACT IS RECALLED**

Upon rejection of the contract by the Mayo Clinic Requestor, the Design Professional receives an email notification, and a message in the Kahua Messages app.

![Message Example](image1)

**NOTIFICATION OF AN APPROVED CONTRACT**

Upon approval of the contract by the Mayo Clinic Requestor, the Contractor receives an email notification, and a message in the Kahua Messages app.

![Message Example](image2)
<table>
<thead>
<tr>
<th>Details</th>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Received</td>
<td>7/10/2018 6:27 PM</td>
</tr>
<tr>
<td>From</td>
<td>Yann Bouzerand</td>
</tr>
<tr>
<td>To</td>
<td>Carol Bumbaca, Rita Hayworth, Yann Bouzerand, Yann Bouzerand</td>
</tr>
<tr>
<td>Cc</td>
<td></td>
</tr>
<tr>
<td>Subject</td>
<td>The Contract for Hayworth Design on SP physical reeducation room has been approved</td>
</tr>
</tbody>
</table>

The Contract for Hayworth Design on SP physical reeducation room has been fully approved.
VIEWING THE CONTRACT IN THE CONTRACT APPLICATION SHARED BY THE MAYO CLINIC

Once the contract is approved, the users may view the contract in the Contract log shared by the Mayo Clinic.

1. Navigate to the project where Mayo Clinic is sharing the app.

2. Using the Apps Launcher, open the Expenses app that is within the Cost Management group of apps. The Expense app opens with the Contracts sub app active. Toggle in the tab to the Contracts App shared by Mayo Clinic Enterprise to get access to the Mayo Clinic Enterprise Contract app log.

3. Select the contract in the log then select **VIEW from the menu in the Detail pane** to see the contract.
4. Select the icon to display the PDF version of the contract.

Note that as a Mayo Clinic Construction Industry Partner, the user will have view only access on the contract.
APPROVING THROUGH THE DELEGATION OF AUTHORITY PROCESS (DOA)

Note: this section has instructions for Mayo Clinic users only. These steps do not apply to the Mayo Clinic Construction Industry Partner users.

The DOA process (Delegation of Authority) is an approval process for contracts and related documents that enforces review and approval of expense contracts and related change orders. Mayo Clinic has set up a matrix that routes for approval to the right people/roles to sign a contract based on the total contract value. Depending of the amount, a document may require three or more approval signatures.

Mayo Clinic uses a master DOA matrix that determines the roles of the people in the DOA process and the dollar limits of authority for each role in the DOA. Using information from the Project about the names of the individuals in the approval roles and based on the total contract value, the DOA process, when initiated, routes a contract (or other document such as a change order) to the individuals required to approve and sign the document.

When a contract is sent into the approval workflow, each required person in the DOA process for that project is sent a task to review and approve or reject the contract. Approvers receive tasks when the Approver before them approves and signs the contract.

An Approver is alerted to a task requiring attention in these ways:

- A task notification pop up message appears if the user is logged in when the task is sent.
- The Task app icon on the Apps bar displays a red number indicating a new task has arrived.
- A Kahua message is sent to Approver; the Message app icon on the Apps bar displays/increments a red number indicating a new message has arrived.
- An email is sent to the Approver’s email account

The approval process will be done through the TASK app and will be the same for all the users involved in the DOA.
To approve a contract amount:

1. **Select the task in the TASKS application**

   The task opens in the Detail pane. This is a read only record.

   ![Task Details](image)

   The summary displays the contract totals by category.

   ![Contract Totals](image)

   The REVIEW section displays:
   - **Comments**: displays the comments left by the Design Professional
   - **Workflow Status**: shows the current status (in this case the status is now **Sent for Approval** instead of **Draft**)
   - **Pending With**: displays with whom the contract is pending
2. Review the ITEMS section

### ITEMS

<table>
<thead>
<tr>
<th>DESC</th>
<th>ACCOUNT CATEGORY</th>
<th>STATUS</th>
<th>EST. LABOR HOURS</th>
<th>LABOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arch</td>
<td>C11910200</td>
<td>Submitted</td>
<td>50</td>
<td>$50,000.00</td>
</tr>
</tbody>
</table>

3. Type a comment in the COMMENTS section as needed.

The Design Professional’s digital signature appears with the date and the time below.

4. Take action on the task using one of the Action buttons:

- **Save** Will save the task where it will still be in your task Log. This is useful if, before answering, you want/need to gather some information to make the approval.

- **Approve** - Will approve the contract at this level of the DOA. If the contract requires additional signatures, the contract will continue in the DOA workflow process and be routed to the next DOA step and the next Approver will receive a task.

- **Reject** - Will Reject the contract which sends the contract back to the CIP for review and action. The Design Professional will be notified through an email notification, a Kahua message, and a task in their Kahua Tasks app. The user will be prompted to add a comment before executing the rejection.
5. Select **Approve** to approve the contract. The Approver will be prompted to enter their PIN code previously set in Account Setting in order for the Approver’s signature to be added to the record.

Once the contract has been approved through all the DOA steps, the Workflow Status in the record from the Contract application log view is showed as **Approved**.

Each DOA approver receives an email and a message notification in their Kahua Message application, including the design professional.
When selecting the contract in the Contract app log, the contract displays on the right pane.
In the SIGNATURES section, all signatures are displayed.

To see the contract in PDF format, select **VIEW**. The contract portable view displays in the Detail pane.
Click on the icon to open a PDF viewer from which you can save or print the PDF version of the contract.

Note that the Contract cannot be edited. Only a Mayo Clinic administrator will be allowed to unlock the contract by clicking on the Unlock button at the bottom of the page.

When the contract is unlocked, it can be sent back to the Design Professional by clicking Send for CIP signature.
CONTRACT IN THE WORK BREAKDOWN

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

1. Click the App Launcher and select the Work Breakdown application under the Cost Management section.

The currency of the Pending contract will be in the COMMITMENTS section in the Pending Commitments column and the Potential Committed Amount Column.

Once the DOA process is complete and the contract is fully approved, the approved contract appears in the Original Commitments column, Current Commitments column and the Potential Committed Amount column.

2. Select the arrows on the left part of the Work Breakdown in order to drill down into the activity codes and see the details.
APPENDIX: TEMPLATES FOR TEXT FIELDS IN THE DESIGN SCOPE & MILESTONES SECTION OF DESIGN CONTRACTS

This section has samples of text that is appropriate to put into the text fields of the Design contracts. Some of the information in this section is presented as an image. Other information is presented as formatted text. You can select the formatted text and paste it right into the contract form in the appropriate field.

Click here to return to the Design contract documentation.
Below is an excerpt from the contract showing the layout and location of clarifications section.

The Owner recognizes that the Design Professional is experienced and understands the Owner’s requirements for the Project. However, for clarity, the Owner notes, without limitation, the following specific items that will be addressed, considered and performed:

Planning/study/design services:

Construction phase services:

Interior design services:

Special Owner’s systems which shall be addressed in design:

For clarity, the Design Professional notes, in response to the Request for Services, the following items:

Below is the text that can be copied and pasted for each of the clarification sections.

**Planning/study/design services:**

Master Planning

Campus Planning

Fit Plan Designs

Feasibility Studies

Code Studies
Engineering Analysis
Cost Benefit Analysis
A three-dimensional model
Computer generated visual aides
Equipment selection/layouts
Site survey
Site evaluation
Environmental study
Special governmental authority requirements
Infrastructure review
Cost estimating
Coordinating of other consultants
Life cycle/operational cost analysis
Project construction phasing documents
Laboratory/testing coordination
Green Building

**Construction phase services:**

Conduct final fire/smoke barrier inspection and provide written certification of compliance with applicable codes

**Interior design services:**

Meet with the Owner’s representatives to determine specific user requirements for furniture.

Evaluate potential reuse of furniture and furnishings.

Conduct inventory of existing furniture (noting upholsteries and finishes) and photo documentation.

Prepare furniture layouts based on information gathered from Owner’s representatives/users and incorporate both new and existing furniture where applicable. All furniture must include Mayo
established standards, guidelines and clearances. Review layout with Owner’s Interior Designer prior to review with proponent group. If acceptable, review with users and Owner representatives, modify as required. (Includes up to 3 revisions) Identify nonstandard products, configurations and sizes with Owner’s representative/Interior Designer.

Prepare furniture visual aids, to include but not limited to: perspective sketches, photos and elevations.

Prepare preliminary furniture cost estimate if requested.

Prepare contract documents for the procurement, fabrication and installation of furniture, and furnishings. Use owner furnished CAP furniture blocks/symbols. The information should include an existing furniture plan if furniture is to be relocated, new furniture plan, furniture schedule, a full specification if non-standard furniture is used and refurbishment information for reused furniture items. An AutoCAD file must be provided to Owner at completion of construction documents for an electronic pricing take off.

Provide all interior finish & furnishing selections including window treatments, cubicle curtains and shower curtains as required. Multiple schemes may be required. The finishes are to comply with Mayo Standard specification and building standards unless previously reviewed and agreed upon by Mayo Interior Designer/Owner’s representatives. Review with Owner’s Interior Designer prior to reviewing with proponent group. Revise finishes as needed.

Prepare visual aids to include but not limited to: renderings, material finish boards and 3D Images.

During schematic design, assist Owner’s Art coordinator/Owner’s representatives with art budget and identify locations for placement of art. Review and coordinate adjustments in lighting and mechanical plans with art locations to ensure correct placement of light fixtures and conflicts with thermostats, alarms etc. Owner’s Art coordinator to select, procure and install art. Provide art selections, procurement and installation coordination as requested.

During schematic design, assist Owner’s Plant coordinator/Owner’s representatives with plant budget and identify locations for placement of plants. Review and coordinate adjustment of light fixtures and other potential conflicts for plant locations. Owner’s Plant coordinator to select, procure and install plants. Provide plant selection, procurement and installation coordination as requested.

Contact Owner representatives/Wayfinding coordinator for assignment of room numbers and direction on signage procurement and installation. Signage should comply with Owner’s standard.

Conduct final review (Q-Review) of contract documents for furniture, furnishings, finishes, art, plants and signage with Owner’s representative, Project Manager and Interior Designer. Documents are to be 99% complete for this review. Revise documents as noted with redlines.

Complete a post occupancy review and punch list of furniture, finishes and signage as requested.

Provide 8 ½ x 11 pages for existing material finish binder or if required a new material finish binder to include project building finishes, upholstery fabrics, wood stain, finish schedule and key. Place pages in clear plastic sheet protectors. (Avery SP119). These finish documents should be provided when
construction documents are issued. Revisions to these documents may be required as a result of change orders, value engineering, discontinued products or reselections.

**Special Owner’s systems which shall be addressed in design:**

- Intercom
- Dictation
- Video
- Electronic time keeping
- Patient lifts
- Vitals monitoring
- HUGGS System
- Surgeon locator
- Anesthesia call
- MATV
- Nurse call
- Security systems (card access/door monitoring, CCTV and intercom)
- Overhead paging and music
- Room occupancy
- Patient wandering/theft prevention

**Telephone/data:**

Meet with the Owner’s representatives to determine and develop specific requirements for pathways and equipment rooms needed to support installation of telephone/data cabling systems.

Specify the materials and installation of the cabling systems from the building service points to individual floor communication rooms. Included are interconnections with the campus systems.

Include floor plans and schedules that show and list individual wiring identification as coordinated with the Owner.

Meet with the Owner and manufacturers to determine specifications and layouts of electronic equipment (i.e. switch) and components.
Analysis and evaluation of multiple system administration programs.

Testing and analysis of EMI/RFI signals that originate from sources outside the building.

Building automation system:

Provide data access and 120 volt power to control panels and mechanical equipment needing DDC controls.

Drawing documentation of building automation system low voltage control wiring layouts and connection points as identified by the system manufacturer’s installation requirements and approved by the Owner’s Representative to allow competitive bidding of system wiring.

**Lighting design:**

Calculations, design and fixture selection to provide special area lighting as developed during meetings with the Owner and in-house architectural/interior designers.

Special designs and tasks

Scaled models

Computer renderings in 3D with lightscape, AGI or equal

Custom fixture design which includes hand sketches or other renderings

Estimating and coordinating of special fixtures

Energy audits and light level readings at existing projects

Development of energy rebates with power companies

Electrical systems:

Available fault calculations

Load studies

Consideration of special equipment

Isolated power

Arc flash calculations (utilizing SKM software to update Owner’s database)

Mechanical systems:

Hyper/hypothermia water circulation

Medical gases
Pressure controlled rooms

Conveyance systems

Pneumatic tube

Elevator

Electric track vehicle

Vertical conveyor