MAYO CLINIC

 November 2019
 MAYO CLINIC IVIC
 Prepared for the Mayo Clinic

 Enterprise Kahua Deployment

Change Requests Overview

Change Events

Contracts

Change Requests

The Change Requests app will be used to record Construction Industry Partner requested changes. The Kahua Approvals workflow will route the approvals through the levels configured for the project. If approved, a Change Request can be processed into a Change Order by the Owner (see Change Order QRG for more information).

Processing is a function used to create one document type from another, copy across common data, and create a link between the documents that can be used to show document relationship and application of origin.

The Change Requests app is in the Cost Management section, as a sub application of the Expenses application.

Recent	Cost Management	Other
Se Funding	Expenses	Community
() Getting Started	Funding	Contacts
S Expenses	MA Master Agreement	File Manager
Packaged Submittals	Work Breakdown	() Getting Started
Domain Settings	Document Management	Sroups
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		
] ⁴ ⊠ ⁸⁶ [\$]	Ū
Apps Project Finder	ks Messages Expenses	Getting Started

Change Orders

Pay Requests

Purchase Orders

Invoices

Sharing the Change Requests Application with an External Party

This chapter has information for Mayo Clinic users only.

To work with your Construction Industry Partners (CIPs), Mayo Clinic must share the Change Requests application. Sharing the application will let the contractors send a Change Request to the Mayo Clinic team.

To share the application:

Ensure that you are in the correct project

Navigate to the Change Requests application located in the Expenses

Recent	Cost Management	Other
Funding	S Expenses	Community
(I) Getting Started	Funding	(a) Contacts
S Expenses	MA Master Agreement	File Manager
Packaged Submittals	Work Breakdown	() Getting Started
Domain Settings	Document Management	会 Groups
Administration	Communications	Mi Milestones
Company Profiles	Daily Reports	PD Project Directory
Configuration	Field Observations	Projects
Dev Logs	All 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		

86 \bigcirc Ŀ \$ Getting Started Apps Project Finder Messages Expenses Change Events Change Requests Change Orders Purchase Orders Contracts Pay Requests Invoices

Select the button MORE, then SHARING

NEW REPORTS MOR		
		۵ 🖨
Cor CREATE REPORT	iption Workflow Status Pending With Total Status References 0 ltem(s)	

Select ADD. The right pane displays the New Share window

×		□ *
ADD EDIT END SHARE	New Share	
COMPANY PERMISSION LEVEL ROLE(S) STATUS HAS FILTER ALLOW COPY START DATE END DATE		
	Project:	SP physical reeducation room
	Application:	Expense Change Requests
	Share With:	Company Group
	Company:	Newman Construction X
	Permission Level:	Contractor
		ROLES: Contributor
	Send Invite To:	Paul Newman - Newman Construction
	Allow copy	Copying is not enabled in this application.
	Filters:	Contracted Pari
		Oand Oor
		
	Cancel Send	Invitation
0 Item(s)	Gander Selid	In a reaction

Fill out the fields.

SP physical reeducation room Expense Change Requests	
Expense Change Requests	
Company Group	
Newman Construction ×	
Contractor	
ROLES: Contributor	
Paul Newman - Newman Construction	
Copying is not enabled in this application.	
Contracted Parl	×
	Newman Construction × Contractor ROLES: Contributor Paul Newman - Newman Construction Copying is not enabled in this application. Contracted Parl • Ontracted Parl • Ontracted Parl • Ontracted Parl • Ontracted Parl •

Project- This is a view only field that indicates the project's name that is being shared from Mayo.

Application- This is a drop down list of applications that could be shared. By default, it displays the current application.

Share With- This is a radio button field. The user will be able to choose between *Company* or *Group*. Note that Mayo will typically be sharing with Company, as this allows for greater flexibility in filtering shares to eliminate risk of sharing confidential information on the log.

When the user chooses *Company*, specific fields will appear to help define the parameters of the share:

Project:	SP physical reeducation room	
Application:	Submittals	
Share With:	Company OGroup	
Company:	Newman Construction X	
Permission Level:	Contractor •	
	ROLES: Contributor	
Send Invite To:	Paul Newman - Newman Construction	

Company- Select the desired company to share the application with. Kahua will display the company that the users added to the Contact Application.

Permission Level- Select the appropriate permission level for the company being shared with. For instance, a contractor will have the *Contractor* group level permission. This list is looking to the 'Groups' that were set up by Mayo to define standard permissions. Choose the appropriate group.

Note that the roles have been set by Mayo Clinic and give specific permission to the external party users.

In this case, the *Contractor* permission level will allow the external party user to: Add, edit, export, open the application, process and view Change Requests, but NOT to delete Change Requests.

Send Invite To- Select the external party user to whom the invitation to share will be send. Kahua will display the users from the company field selected above. You should choose just one individual to receive the sharing invitation and who will be responsible for accepting the share via a task in Kahua. This will typically be the person in the company that is responsible for managing that project.

When the user chooses *Group* rather than *Company*, specific fields will appear. Recall that sharing with a group means that all users invited to the share will have the same permission – to filter a log when shared, use the *Company* option above.

New Share		
Project:	Patient Rooms Renovation	
Application:	Expense Change Requests	
Share With:	OCompany OGroup	
Permission Level:	Contractor 🔹	
	ROLES: Contributor	
Note: Each company needs to approve sharing to view the shared item. You can send invites to one or more individuals.:		
Send Invite To:		
Name Company	Company Status Invitation Status	

Permission Level- Select the Permission Level in the drop-down list. This refers to the Groups set up by Mayo with standard permission by role. Select the appropriate group and the permission assigned to that group will auto populated below.

Once the **Permission Level** has been assigned, a list of users with their company, company status and invitation status will be displayed below the **Send Invite To**. The user will be able to choose the users/companies to invite to the share. These users will receive a task to accept the share into their domain.

Send Invite To:			
Name	Company	Company Status	Invitation Status
Domain Admin	Mayo Enterprise	Not Invited	Not Invited
Mayo Role Test Project Manager	Mayo Enterprise	Not Invited	Not Invited
Mayo Role Test Construction Manage	er Mayo Enterprise	Not Invited	Not Invited
Mayo Role Test Proponent	Mayo Enterprise	Not Invited	Not Invited
Mayo Role Test Corporate Officer	Mayo Enterprise	Not Invited	Not Invited
Mayo Role Test Facilities Head	Mayo Enterprise	Not Invited	Not Invited
Mayo Role Test Project Lead	Mayo Enterprise	Not Invited	Not Invited
Mayo Role Test Quality Lead	Mayo Enterprise	Not Invited	Not Invited

Allow copy- this option allows the external parties to keep a copy of the record shared with the Mayo Clinic upon termination of the share. This is good practice if the company will need to reference a static version of the log post-project.

Filters- Allows the user to set a filter to limit what the external party will see in the log. This is commonly used in allowing a company to see solely the records that apply to their company for confidentiality reasons. Filtering is required to be done for this reason.

The filter should be set as follow

Filters:	Contracted Part	contains -	Havworth Design	x
				J **

Contracted party + contains + company's name

OR

Contracted party + equals + company's name

If contains is used- it means that Kahua will display all the records with the word you entered in the filter at any level of a document (title, sentences etc..).

If equals is used- it means that Kahua will display only the records with exactly that string and nothing more than the word you entered in the filter.

Make sure that the filter you choose ensures that the selection will be unique

Once all the fields have been populated and reviewed, select **Send Invitation** to send the invitation to share to the external parties. At this time, a task will be sent to the user(s) selected in the share section. See below instructions to support third parties as they accept the share.



Accepting shared Change Requests App from Mayo Enterprise as an External Party

This section has instructions for Construction Industry Partners (CIPs). These steps do not apply to Mayo users, but Mayo users should be familiar with them as they support and assist third parties in accepting shares.

To collaborate, Mayo Clinic will share their Change Requests app per project with their CIPs. These are the steps the CIP executes when accepting a share:

- 1. The CIP will receive a sharing invitation in the Tasks application within the CIP's domain.
- 2. Click on the Tasks icon to load all tasks into the Log window.
- 3. Click on the Kahua Sharing Invitation task to open the task in the Detail pane.

Note: The CIP will need to review the information and determine whether they already have the specific project already created in Kahua for this project or can decide to initiate a project directly from the task itself. When creating a new project in the CIP domain, the recommendation is to keep the default project name, but third parties may choose to name the project something other than what the project is called within Mayo's domain.

Within the Task, use the navigation bar to navigate to the project that this share relates to, OR click on the Create New Project button. Indicate the project name in the window that appears or choose to leave the default project name that Mayo uses. Verify the proper project name appears in the teal bar within the task. When complete, click Accept in the task window.

Apps Project Finder	4 ×
Active V	
NEW SHARE	- *
🚍 🔻 View: Default 🔹 🔹 🔹	Sharing Invite - Mayo Enterprise Expense Change Requests
FROM SUBJECT DATE ASSICNED DUE DATE APP PROJECT	Paul,
Yann Bouzerand Kahua Sharing Invitation 8/6/2018 Sharing SP physical reeduca	Yann Bouzerand of Mayo Enterprise is requesting to share the following data with your company:
Yann Project Manager Kahua Sharing Invitation 6/27/2018 Sharing 02011882 Parking re 2 Item(s)	Project: or physical redolucation room App: Expense Change Requests List / Folder: Root Role: Contributor
	<text><text><text><text></text></text></text></text>

Once accepted, the CIPs must be sure to be in the correct project to be able to use the Mayo Clinic applications. The project name will be at the top left of their Kahua domain in the Navigation Bar. A likely cause of being unable to view a shared list of records is that the user is not in the proper project to which the share was accepted.



To view the Mayo shared Change Request application which shows the change request records on the project, the user must open the application that was shared, and then toggle in the upper left corner to the correct shared project link using the sub-app drop-down below the App Bar.



Creating a Change Request

This section has instructions for CIPs. These steps do not apply to Mayo users.

To create a Change Request: (Typically this function will be completed by the CIP. Mayo may create a Change Request if a CIP is not a user of Kahua.)

1. Navigate to the Change Requests app and toggle to the shared Expense Change Requests app from the sub-app drop down.

BB L: Image: Control of the second s	ē ×
Contracts Change Requests Change Orders Pay Requests Purchase Orders Quote Requests Invoices	
Bergense Change	
Change Requests	
Search All Search All	۹ 🖯
Contract Number Vendor CR Number Description Total Cost Status References	

Select **NEW**. The Change Request record displays in the Detail pane.

Apps Project Finder Tasks Messages Getting Started	@ r ×
Contracts Change Requests ! Change Orders Pay Requests Purchase Orders Quote Requests Invoices	
Shared by Mayo	
NEW REPORTS MORE -	■ • ∀□ ×
🚍 🗸 Max Default 👻 🛛 Search All 🔹	Number Description New
Contract Number Vendor CR Number Description Total Cost Status References O Item(s)	Details Review Items Signatures References - DETAILS Project Number Project Name Beau Esmondo Test Project Contract Contract Signatory Vendor Number Contract Type Requested Date 11/28/2019 Vendor CR Number Description Affect to Contract Time
	Cause of Change

At the top of the record, the currency amounts will be calculated/displayed once the initiator selects a Contract from the Contract dropdown field.

Note the Summary Items at the top of the Change Requests will differ based on the type of the Contract selected (Construction, Design or CM at Risk / Design Build).

Construction Contract selected:

		Labor Save To Calculate Construction Subcontracted Save To Calculate Subtotal Labor + Construction Subcontracted Save To Calculate Material Save To Calculate Construction Fee Save To Calculate Tax Save To Calculate Other Construction Reimbursables Save To Calculate Total Save To Calculate
Details Review Items Signature	es References	
✓ DETAILS		
Project Number		
Project Name	Beau Esmonde Test Project	
Contract	Contract 0004 Acme Inc. ×	
Contact	Beau Esmonde	
Contract Signatory		1
Vendor Number		
Contract Type	Construction	

Design Contract selected:

		Prof Services Fee Save To Calculate Prof Services Sub-consultant Save To Calculate Subtotal Prof Services Fee + Prof Services Sub-consultant Save To Calculate Prof Services Reimbursable Save To Calculate Total Save To Calculate
Details Review Items Signate	ures References	
- DETAILS		
Project Number		
Project Name	Beau Esmonde Test Proj	ect
Contract	* Contract 0001 Kahua-J	MH ×
Contact	Jim Harrington	
Contract Signatory	Jim Harrington	
Vendor Number		
Contract Type	Design	

Fill out the **DETAIL** section fields

- DETAILS	
Project Number	
Project Name	Beau Esmonde Test Project
Contract	* Contract 0004 Acme Inc. ×
Contact	Beau Esmonde
Contract Signatory	
Vendor Number	
Contract Type	Construction
Requested Date	11/28/2019
Number	* 0001
Vendor CR Number	* 081579
Description	* Asbestos removal
Affect to Contract Sum	* Yes
Affect to Contract Time	0
Cause of Change	

Project Number/ Name- Non-editable fields. Data is populated from the Project information.

Contract- Drop down list of contracts for the project, select the appropriate contract. If filtered properly, the CIP should only see contracts applicable to their company.

Contract- Non-editable field, will display the CIP's contact name linked to the Mayo contract.

Contract Signatory- Non-editable field, will display the CIP's contact signatory name linked to the Mayo contract.

Vendor Number- Non-editable field. The data is populated from the CIP company profile record in the Contacts application. This is a Mayo-assigned number based on Mayo's finance software system.

Requested Date- This is an editable field but will be defaulted to +7 days from the current date. This indicates that a response is requested by the date in this field.

Number- This is an auto populated field for Change Requests which number sequentially for the Project. While this number can be changed, the defaulted number should be left.

Vendor Change Request Number- This is an editable field. Type the Vendor Change Request number for reference.

Description- This is an editable field. Type a description of the Change Request with specific information as to the scope of work.

Affect to Contract Sum- This is a drop down list. Select whether or not this Change Request affects the sum of the contract components by entering YES or NO.

Affect to Contract Time- This is a numeric field to indicate an impact to the Substantial Completion date for the contract. Enter the number of days that would be added to or subtracted from the Substantial Completion date.

Cause of Change	Field Condition -
	Hidden toxic tank
Cause of Change - Comments	
Delivery Method	Stipulated Sum 👻

Cause of Change- This is a drop down list. Select the cause of change from pre-determined choices.

Note that if Other is selected, an additional text field will appear to specify what the Cause of Change is.

Cause of Change, Comments- This is a text field. Type a comment about the cause of change.

Delivery Method- This is a drop down list. Propose a delivery method for this Change Request.

CC Notifications- This is a contact drop down list. Select other contacts to notify of the Change Request.

Comments- This is a text field. Type a comment about the Change Request.

Cost Status- This is a drop down list but this is driven by workflow. Leave the default status as is.

The REVIEW section:

- REVIEW	
Date Submitted	Select a date 15
Date Approved	Select a date 15
Date Returned to Vendor	Select a date 15
Review Comments	
Workflow Status	Active
Pending With	

The **REVIEW** section will be driven by a workflow during the approval process. Nothing must be filled here. Dates will be recorded as the Change Request is processed through workflow.

Changes to Contract Sum can be entered in the Cost Item grid. Edit the line items that are increased or decreased to accommodate this Change Request.

To add a line item, select the number of lines then select Insert.

▼ ITE	MS								
Ins	sert	1 i	tem(s)						P
		NO.	DESC	ACCOUNT CATEGORY	ITEM TYPE		COST STATUS		TOTAL
	P	001	Capital Equipment	.C3301C9000 Capital Equipment ×	* Material	•	Draft •] \$[15,000.00
	P	002	Contingency	.C2101C2430 Sitework ×	* Labor	•	Draft -] \$[20,000.00
	P	003	Expensed Equipment	C2101C2010 General Construction ×	* Construction Fee	•	Draft •] \$[55,000.00

Remember the DESC, ACCOUNT CATEGORY and ITEM TYPE fields are required. The ACCOUNT CATEGORY column defines in which row the currency amount will be displayed in the Work Breakdown. The ITEM TYPE field will determine how to classify the cost.

- ITEN	/IS						
Ins	ert [1	item(s)				P
		NO.	DESC	ACCOUNT CATEGORY	ITEM TYPE	COST STATUS	TOTAL
	₽	001	Capital Equipment	.C3301C9000 Capital Equipment ×	* Material 🔹	Draft • \$	15,000.00
	Ø	002	Contingency	.C2101C2430 Sitework ×	* Labor 🔹	Draft • \$	20,000.00
	₽	003	Expensed Equipment	.C2101C2010 General Construction ×	* Construction Fee	Draft • \$	55,000.00

Please note the dropdown options in the Item Type field will be determined based on the type of the Contract selected (Construction, Design or CM at Risk / Design Build).

Item Type dropdown list when a Construction type contract is selected:

→ ITEMS						
Insert 1 item(s)						Þ
NO .	DESC	ACCOUNT CATEGORY		ITEM TYPE	COST STATUS	то
001			*		▼ Draft ▼	\$
		(Labor	, ¹)
Other Costs Proposed	Enter a summary description contract form.	n of all cost items of t	Material		ed on the Change Ord	ler
			Construction S	Subcontracted		
			Construction F	ee		
			Tax			
		L L	Other Constru	ction Reimbursables		

Item Type dropdown list when a Design type contract is selected:

Insert 1 item(s))		RD (
NO. DES	C ACCOUNT CATEGORY	ITEM TYPE	COST STATUS TOTAL
口 团 001		*	▼ Draft ▼ \$
Other Costs Proposed	Enter a summary description of	Prof Services Fee	of this field will be entered on the Change Order
contract form.		Prof Services Sub-consultant	
		Prof Services Reimbursables	

Item Type dropdown list when a CM at Risk / Design Build type contract is selected:

✓ ITEMS		
Insert 1 item(s)		<u>و</u> ا
NO. DESC ACCOUN	T CATEGORY ITEM TYPE	COST STATUS TOTAL
001	*	Draft • \$
Other Costs Proposed Enter a summary d form.	Labor Material Construction Subcontracted Construction Fee	alue of this field will be entered on the Change Order contract
✓ SIGNATURES	Other Construction Reimbursables	
	Prof Services Fee	٩ ٩
Approver Approver Role Signature Ap	Prof Services Sub-consultant Pr Prof Services Reimbursables	

The Status will be driven by the workflow. Leave the default value.

→ ITE	MS						
In	sert	1	item(s)				P
		NO.	DESC	ACCOUNT CATEGORY	ITEM TYPE	COST STATUS	TOTAL
	₽	001	Capital Equipment	.C3301C9000 Capital Equipment ×	* Material 🔹	Draft •	\$ 15,000.00
	₽	002	Contingency	.C2101C2430 Sitework ×	* Labor 🔻	Draft •	\$ 20,000.00
	₽	003	Expensed Equipment	.C2101C2010 General Construction ×	* Construction Fee	Draft •	\$ 55,000.00

If additional detail must be given to a line item, select the icon at the left of each line item.

Other Costs Proposed- Text field, the "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." Text is defaulted when a change request is created. Users can type here the reason for other costs. This field is only used if there is a scope of work of the change request that is not covered by the standard components of labor, material, subcontractor, sales tax, or fee.

ſ	
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.
_	

SIGNATURES section. Approval signatures are displayed in this section as the Change Request moves through the approvals workflow.

REFERENCES section. Attach any support documents to the Change Request by selecting UPLOAD or ADD KAHUA DOC.

ſ	▼ REFEF	RENG	CES											
				LOAD	ADD KAHUA DOC	EDIT I	MARKUP	UPDA	TE REMOVE	DOWNLOAD	ADD COMPOSITE	ADD APPROVAL	LDOC	
	TYPE	DE	SCRIPTIC	ON (CONTRIBUTOR	DATE	MARK	UP?	INCLUDE	ON SEND	INCLUDE MARK	UP ON SEND	IS CURRENT	PREVIEW STATU

Use the buttons at the bottom of the form as appropriate:

Save saves the record without going into workflow in case the CIP needs to continue editing the Change Request later.

Submit for Contract Signatory Approval sends the Change Request to the Contract Signatory for approval. This field is defined in the associated contract.

Submit for Contract Signatory Approval Submit for Mayo Approval

When **Submit for Mayo Approval** is selected, the Change Request is submitted to Mayo Clinic after the CIP enters their PIN code to apply a digital signature to the document.

Details Review Items Signatures References			5	Subtotal Labor Othe	Construction + Construction C er Construction	Labor 5 o Subcontracted Subcontracted 5 Material 5 onstruction Fee 5 Tax Reimbursables Total 5	\$20,000.00 \$20,000.00 \$15,000.00 \$55,000.00 \$90,000.00
Workflow Status Active							
Pending With							
Add Signature							
							P
Enter PIN:	8Y		ITEM TYPE		COST STATUS	TOTAL	
Continue	iquipment	Material			Draft	\$15,000.00	
Contuintee Canter		Labor			Draft	\$20,000.00	
고 003 General Construction .C2101C2010 General C	Construction	Construction F	ee		Draft	\$55,000.00	
Other Costs Proposed Enter a summary description of all co	st items of ty	vpe 'Other'. The	value of this	s field will be en	tered on the Cha	ange Order contrac	ct form.
- SIGNATURES							
							ē
Approver Approver Role Signature Approved At							
- REFERENCES							
VIEW DOWNLOAD							
TYPE DESCRIPTION CONTRIBUTOR DATE MARKU	JP? INCL	JDE ON SEND	INCLUDE	MARKUP ON		RENT PREVIE	W STATU
Submit for Contract Signatory Approval Submit for Mayo Ap	proval						

Once the PIN code is entered, the Change Request is submitted to Mayo Clinic and will go through an Approvals workflow process by sending tasks to appropriate parties.

When any action is selected on the record, the currency amounts are calculated and recorded in the Summary section at the top of the record.

Contract 0004 Acme Inc. 0001 Asbestos removal	Preview
	Labor \$20,000.00 Construction Subcontracted Subtotal Labor + Construction Subcontracted \$20,000.00 Material \$15,000.00 Construction Fee \$55,000.00 Tax Other Construction Reimbursables Total \$90,000.00

CIPs have an option to recall the Change Request by selecting the Recall button if something needed to be changed in the record. When it is recalled, it removes the Task from the Mayo Clinic User's Task application and the record goes back to the CIP to be edited.

Apps Project Finder Tasks Messages			© 2 ×
Contracts Change Requests Change Orders Pay Requests Purchase Orders	Quote Requests Invoices		
Shared by Mayo			
NEW REPORTS MORE ▼ SEND PROCESS VIEW HISTORY	•		¥ 0 🗆 🗙
	SEND PROCESS VIEW HISTORY	(
	Contract 0004 Acme Inc. 000	1 Asbestos removal	Preview
Contract Number Vendor CR Number Description Total			
Contract 0004 Acme Inc. 0001 081579 Asbestos removal \$90,000.00			Labor \$20,000.00
1 Item(s)		Constr Subtotal Labor + Constr	uction Subcontracted uction Subcontracted \$20,000.00
			Material \$15,000.00 Construction Fee \$55,000.00
		Other Constr	Tax
		Other Consul	Total \$90,000.00
	Details Review Items Signatures	References	
	- DETAILS		
	Project Number		
	Project Name	Beau Esmonde Test Project	
	Contract	Contract 0004 Acme Inc.	
	Contact	Beau Esmonde	
	Contract Signatory		
	Vendor Number		
	Contract Type	Construction	
	Requested Date	11/28/2019	
	Number	0001	
	Vendor CR Number	081579	
	Description	Asbestos removal	
	Affect to Contract Sum	Yes	
	Anect to Contract Time	U A/E Omission	
-	cause or change	AVE OTHISSION	
	Recall		

The entry in the Log pane, indicates with whom the record is in pending with and shows the status as Submitted.

Revie Workt Pendi • ITEM	w Comr flow Sta ing With IS	tus Sent for A Beau Esm	pproval nonde - CBRE Sandbox	_				
						D		
	NO.	DESC	ACCOUNT CATEGORY	ITEM TYPE	COST STATUS	TOTAL		
Ø	001	Expensed Equipment	.E4201E9000 Expensed Equipment	Material	Submitted	\$15,000.00		
Ø	002	Sitework	.C2101C2430 Sitework	Labor	Submitted	\$20,000.00		
Ø	003	General Construction	.C2101C2010 General Construction	Construction Fee	Submitted	\$55,000.00		
Other	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.							

Once Mayo Clinic receives the Change Request submitted by the CIP, they will need to take action:

Approve- This action will approve the Change Request. If the Change Request is approved, the contractor will receive a Kahua message notification and an email saying that the Change Request has been approved. If approved, Mayo will 'Process' the Change Request into a Change Order.

Decline- This action will reject the Change Request. If rejected, Mayo Clinic will be required to leave a comment for the CIP indicating a reason. The CIP will receive a message notification and a new editable Kahua Task letting them know that the Change Request has been rejected.

Note that once rejected, the CIP can decide to either modify the Change Request and submit it again for approval or void it.

Declining or Approving a Change Request through the Approvals Workflow Process

This section has instructions for Mayo Clinic users. These steps do not apply to the CIPs.

Once the CIP has submitted the Change Request, the Change Request goes through the approval process. Kahua Approvals is a configurable approval process with limits of authority based on the document amount. Approval routes are configured on each project and cannot be changed except by the Site Administrator. The document will be routed through one or more Mayo Clinic approvers depending on the dollar amount requested and the limits of authority of the various approvers, as well as the type of contract (Design, Construction or CM at Risk / Design Build).

These steps are the same across all the approvers in a route and are done through the Kahua Tasks application.

Mayo Clinic users involved in the approval process will receive:

• An email notification and a Message in the Kahua message application:

ressaye Detall	
etails Attachment	S
DETAILS	
Received	8/7/2018 4:11 PM
From	Paul Newman
То	Carol Bumbaca
Cc	
Subject	Please review the Change Request for SP physical reeducation room
Please review a	nd approve the Change Request for SP physical reeducation room using <u>Kahua.</u>

• A task through the Kahua Tasks application:

To approve or decline a Change Request:

1. Click on the Tasks Icon on the App bar. Then, select the Task from the Log. The Change Request displays in the Detail pane. It is a PDF document of the Change Request displaying all details including the complete line items and Change Request total amount at the bottom.

Tasks

		¥		¥ ¥
NEW SHARE			HISTORY	
View: Defa	ault 👻	Q 🖨	View	Task
FROM	SUBJECT	DATE ASSIGNED	Approval Document	
Beau Esmonde	Please review the Change Request for B	11/21/2019	- APPROVAL DOCUMENT	
Kailee Olson	Project: K1000104 - KO Test 3 Please re	9/17/2019		
Kailee Olson	Please review the Budget Change Order	9/9/2019	Page 1 / 1 🔊 91% 🔍 C D	Ba
Beau Esmonde	Project: K1000004 - BE Test Project Ple	5/14/2019	Expense Change Request	
Beau Esmonde	Please review the Contract/PO for BE Te	3/8/2019	Beau Esmonde Test Project	
	5 Item(s)		Central Contract Contract 0004 Annue Inc. Original Centrale Annue 1: 510,000,00 Change Repark Number: 001 Approximation Change Inc. 50,00 Description: Activities removal Statutes Inc. Current Contract. Resource: 510,000,00 Typer: Construction Contract Contract. Resource: 510,000,00 Current Contract. Resource: 510,000,00 Contract Statutes: Submitted Extension (days): 0 Statutes Inc. Statutes Inc. No. Description: CITY UCM UNIT PRICE TOTAL No: Description: 1,00 \$15,000,00 \$15,000,00 001 Expensed Exagrament 1,00 \$15,000,00 \$15,000,00 002 Stewark 1,00 \$25,000,00 \$25,000,00 003 General Construction 1,00 \$25,000,00 Total:	
			Approve Decline	

The user will have two action options:

Approve - Approves the Change Request sent by the contractor and send the CIP a message that the Change Request has been approved.

Decline – Declines the Change Request sent by the contractor. If declined, Mayo Clinic will be required to leave a comment indicating a reason for the decline. The contractors will receive a message notification and a Kahua task letting them know that the Change Request has been declined.

Note that once declined, the contractors can decide to either modify the Change Request and re-submit it for approval or void it if the reason for decline is accepted.

When Approve is selected, each Mayo Clinic user is prompted to enter a PIN to apply a digital signature to the record.

W SMOS V New Dofust - Prock SubJect Date Associed Dut Date SubJect Date Associed Dut Date SubJect Date Associed Dut Date SubJect Not 1974 Provider Reserve Were Bedget Darage Order 99/2019 C S Sterre(s) S Sterre(s)	
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PROM SUBJECT DATE ASSAME Dull DATE Beau Esmonde Please review the Catagraphic Regard to Ell. 11/21/2019 *APROVAL DOCUMENT allec Olson Please review the Budget Ohango Oder 99/2019 * allec Olson Please review the Budget Ohango Oder 99/2019 * ex.Elsmonde Please review the Catagraphic Regard Name 38/2019 * 5 Bernici) S Bernici) * *	
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voc (tson Please review the Budget Change Order	
u Euronde Preject K100000- 8E Teil Project Ris. 014/2010 > u u Euronde Presse treiver the ContractPO for EE Teil. 38/2019 C S filter(s) Expense Contract Fee Contract Contract Fee Contract Contract Fee Contract Fee Contract Fee	
LEuronde Please review the ContractPO for BETe 3802019 C 5 Item(s) Base Exemption Test Contract Cont	
5 film(s) Expense Ad Signature Beau Esmonta Tee Contract	B
Denotofice: Type Coal Star Extension (days) 0	20.09 20.09 20.09

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 Requests app. If in the task, open the Change

Requests app, select the record in the log and use the View original record button to see the contract record in full detail.



Once the Change Request is fully approved through the Approvals workflow, the record is now locked. It can only be unlocked by a Mayo Clinic administrator.

		¥ 🖉 🕾 🖬
SEND PROCESS VIEW DELETE	HISTORY	
Contract 0004 Acme Inc. 0001	Asbestos removal	Preview
		Labor \$20,000.00 Construction Subcontracted Subtotal Labor + Construction Subcontracted \$20,000.00 Material \$15,000.00 Construction Fee \$55,000.00 Tax Other Construction Reimbursables Total \$90,000.00
Details Review Items Signatures	References	
- DETAILS		
Project Number		
Project Name	Beau Esmonde Test Project	
Contract	Contract 0004 Acme Inc.	
Contact	Beau Esmonde	
Contract Signatory		
Vendor Number		
Contract Type	Construction	
Requested Date	11/28/2019	
Number	0001	
Vendor CR Number	081579	
Description	Asbestos removal	
Affect to Contract Sum	Yes	
Affect to Contract Time	0	
Cause of Change	A/E Omission	
Cause of Change - Comments		
Delivery Method	Stir Lated Sum	
CC Notifications		
Comments Unlock		

The CIP will receive an email and a message notification in the Message app of the Change Request approval.

EPLY REPLY ALL FORWARD VIEW						
Message De	tail					
Details Attach	ments					
- DETAILS						
Received	Received 11/21/2019 3:15 PM					
From	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					

Processing a Change Request into a Change Order

This section has instructions for Mayo Clinic users. These steps do not apply to the CIPs.

To process a Change Request into a Change Order:

1. Select the Change Request in the log then select the **PROCESS** button.

NEW REPORTS MORE ▼ SEND V	IEW PROC	ESS DELETE HISTORY		
▼ View: Default ▼		[۵ 🖨
Contract	Number	Description	Workflow Status	Pending With
Contract 0002 Newman Construction	0001	additional electric work	Approved	\$1
		() ()		

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

Contracts Change Events Change Requests Change Orders Pa	y Requests Purchase Orders Invi	ices	
NEW REPORTS MORE V SEND PROCESS VIEW DELETE HISTORY		•	¥ 0 🗆 ¥
View: Default • Search All •	Q A	SEND PROCESS VIEW DELETE HISTORY	
Contract Number Vendor CR Number Description	Total Cost Status References	Contract 0004 Acme Inc. 0001 Asbestos removal	Preview
Contract 0004 Acme Inc. 0001 081579 Asbestos removal	\$90,000.00 Approved		Labor \$20,000.00
1 Item(s)			Construction Subcontracted Subtotal Labor + Construction Subcontracted \$20,000.00
	Process		Material \$15,000.00 Construction Fee \$55,000.00
	Select target partition and document	1997	Other Construction Reimbursables
	Geleccialger paration and document	ype.	Total \$30,000.00
	Source Contra	t 0004 Acme Inc. 0001 Asbesto	
	Target Application Exper	se Change Orders 🔻	
	Create New		
	Add to Existing		
\longrightarrow			
-	Select copies to include in references	:	
	 PDF of Initiating document (cu 	rent state) on the Destination document	
	 PDF of Destination document (current state) on the Initiating document	
	Select references to include:		
	Type De	cription Reference Type	
		Canael Plat Decession	
		Cancer Statt Processing	
		Cost Status Approved	
		✓ REVIEW	
		Date Submitted 11/21/2019	
		Date Approved 11/21/2019	

Select whether to create a new Change Request by choosing **Create New** or if this is to be added to an existing Change Request by choosing Add to Existing. When choosing Add to Existing, this Change Request is attached to another existing Change Request that has not yet been processed into a Change Order.

• Create New		
Add to Existing		

Next, identify the documents to be included by reference with this Change Request. By default, the checkboxes from select copies to include in references are checked. These should be left as checked.

If any reference documents need to be included, they will appear in a list.

Select copies to include in references:							
PDF of Initiating document (current state) on the Destination document							
PDF of Destination document (current state) on the Initiating document							
Select references to include:							
Туре	Description	Reference Type					

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

Cancel	Start Processing

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

Contracts Change Events Change Requests Change Orders Pay Requests Purchase Orders Invoices			
			• ¥ 🗆 अ
	u 🖻	Change Order - 0002	New
Contract Number Vendor Change Order Number Description Cost Status References	_		Labor Save To Calculate
1 ltem(s)			Subtotal Labor + Construction Subcontracted Save To Calculate. Material Save To Calculate. Construction Fee Save To Calculate. Tax Save To Calculate. Other Construction Reimbursables Save To Calculate. Offiginal Contract Amount Save To Calculate. Original Contract Amount Save To Calculate. Previous Contract Amount Save To Calculate. Current Contract Amount Save To Calculate.
		Details Review Items Signatures Refere	inces
		- DETAILS	
		Project Number	
		Project Name	
		Contract	Contract 0004 Acme Inc. ×
		Contact	
		Vendor Number	
		Type of Change / Request	•
		Requested Date 1	1/28/2019
		Number	0002
		Vendor Change Order Number	081579
		Description *	Asbestos removal
		Affect to Contract Sum	Yes v
		Affect to Contract Time	0
		Cause of Change	A/E Omission 🔹
		Cause of Change - Comments	
		Save / Close 🔻	

Now that the Change Request has been processed as a Change Order, Mayo Clinic users will send the Change Order to the CIPs to get their signature and submission. Once submitted by the CIP, the record will go through the Approvals Workflow process.

Upon saving the new Change Order by selecting **Save**, the record will display three buttons: **Send for CIP Signature**, **Mark CIP Signature Rec'd**, and **Lock**.

Apps Project Finder Tasks	RB E Image: Second Project France Image: Second Project France Image: Second Project France Apps: Project France Table Messages Expenses Cetting Started							<			
Contracts Change Events	Contracts Change Events Change Requests Change Orders Pay Requests Purchase Orders Invoices										
NEW BEPORTS MORE & I SEND EDIT VIEW DELETE HISTORY						1	100	×			
View: Default -			Search All	•		0	SEND EDIT VIEW DELETE HISTORY				
Contract	Number	Vender Change Order Number	Description	Cost Status	Pafarancas		Contract 0004 Acme Inc. 0002 As	bestos removal		Previev	N
Contract 0004 Acme Inc.	0002	081579	Asbestos removal	Draft					Labor	\$20,000,00	_
Contract 0003 CBRE Sandbo	« 0001	2 Item(s	Description goes here	Draft	0				Construction Subcontracted Subtotal Labor + Construction Subcontracted Material Construction Fee Tag Other Construction Reimbursables Original Contract Amount Previous Contract Amount Current Contract Amount	\$20,000.00 \$15,000.00 \$55,000.00 \$90,000.00 \$100,000.00 \$100,000.00 \$100,000.00)))))))))))))))))))
							Details Review Items Signatures Re	ferences			7
							- DETAILS				Ш
							Project Number				Ш
							Project Name	Beau Esmonde Test Project			Ш
							Contract	Contract 0004 Acme Inc.			Ш
							Contact	Beau Esmonde			Ш
							Contract Signatory				Ш
							Vendor Number				Ш
							Type of Change / Request	Contractor Change Proposal			Ш
							Requested Date	11/28/2019			Ŭ
							Number	0002			
							Description	Acheetee removel			
							Affect to Contract Sum	Aspestos territoval			
							Affect to Contract Time	0			
							Cause of Change	A/E Omission			
							Cause of Change - Comments				
							Delivery Method	Stipulated Sum			
							Comments / Schedule Milestones				
							Cost Status	Draft			
							- REVIEW				
							Send for CIP Signature Mark CIF	Signature Rec'd Lock			

See the Change Order Quick Reference Guide for more information.

Change Request in the Work Breakdown

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

Apps Project Finder Tasks	Messages Expenses Getting Started	
[Q	Visit the kStore to explore more than 50 project manage	pernent apps that work the way you want them to work. Visit the kStore
Recent	Cost Management	Other
Expenses	S Expenses	AT Approval Test App
Licenses	Funding	Pape Bid Management
Users	MA Master Agreement	₩₽₽ Bid Room
Contacts	Work Breakdown	Community
Configuration	Document Management	E Contacts
Administration	Communications	File Manager
Company Profiles	Daily Reports	(b) Getting Started
Configuration	Field Observations	会 Groups
Dev Logs	All Meetings	J Milestones
Domain Settings	Punch Lists	Projects
Installed Apps	(j) RFIs	Recycle Bin
Licenses	Submittals	WW Vendor Work Order Management
Project Tasks	Index Management	Wo Work Order Management
Share Manager	SM Site Management	WP Work Packages
Users		

The amount of a Change Request in the **Submitted** status will be display in the Pending Commitment column and will also show in the Potential Committed Amount (sum of Pending, projected, and current commitments) column.



The amount of a Change Request in the Approved status will be display in the Pending Commitments column.

Note that even though approved as a Change Request, the Change Request must be processed into a change order to be fully approved. Then it will show in the Approved Changes column of WBS.