



UNIVERSITY OF ILLINOIS SYSTEM

Issues Application
Training Document

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Overview

Issues are any potential events that can have a potential financial or schedule impact on your project.

The Kahua Issues application enables you to easily log, track and manage issues on your project. Integrated with the Cost Management suite, Issues are used as a precursor for any change requests and change orders that might be issued.

Using the Issues application users will be able to:

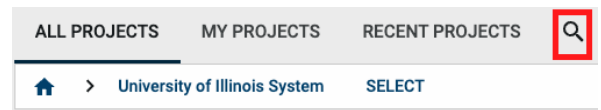
1. Initiate an Issue from other apps such as RFIs, Punch Lists, etc. (see diagram below)
2. Create one or many line items within an Issue. An issue can include multiple contractors / vendors.
3. Use workflow to gather pricing from contractors and vendors
4. Use workflow to review and or obtain approvals
5. Track projected, pending, and approved potential changes
6. Process the Issue into other cost documents

In this guide we will review three types of Issues that can be created:

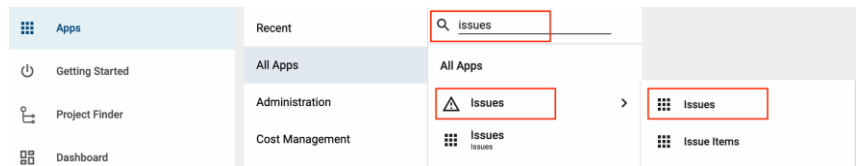
1. Change Orders (where Request for Proposal (RFP) pricing can be entered)
2. Field Directives (FD)
3. Emergency Work Authorizations (EWA)

Create a Change Order Type Issue

1. Issues/RFPs will be created by the Professional Services Consultant (PSC).
2. To create a new Issue, navigate to the appropriate project and go to the Issues Application.
3. To do this navigate using the Project Finder by:
 - a. Clicking on Project Finder in the left side Navigation
 - b. Selecting the Project where the Contract was created
4. You can also use the Search functionality in the Project Finder to locate you project:
 - a. Click on Project Finder in the left side Navigation
 - b. Click on the Magnifying Glass icon next to Recent Projects, as shown in the image
 - c. Type out the Project Name or number and click on the Project



5. Once in the project go to the Issues Application by clicking on Apps, All Apps, and then searching for Issues using the Search Bar.



6. Select the **Issues** application as shown in the image, then click the **New** button to create a new Issue.
7. A new form will open on the right side of the screen.
8. Under Category, select Change Order. This is a required field.
9. Populate the Details such as Date, Description, etc.
10. If the project has a Contractor with Assigned (CWA) or Construction Manager (CM) on the project listed in the project Roster, their name will automatically populate in the Responsible Contact Field. If there is no CWA/CM on the project, the PSC should insert their name as the Responsible Contact.


A screenshot of the 'Issues' application form. The form is titled 'Issues' and 'Issue Items'. It shows a 'Number' field with the value '0009'. Below it is a 'Location' field. The 'Description' field is populated with 'Requested Date 2/19/2024'. The 'Category' field is set to 'Data Migration - Onindus'. The 'Responsible Contact' field is also set to 'Data Migration - Onindus'. There is a 'CC Notification' section at the bottom. The form has a 'Save / Close' button at the bottom left.

11. The PSC can add the contractors to the CC Notification field in the Details section of the Issue so that they will be notified when the Issue has been approved.
12. In the Scope section enter the:
 - a. Estimated Schedule Impact (Days)
 - b. Scope of Work (Required Field)
13. In the Dates & Workflow section enter the Due Date.
14. In the Items section click on the **Select Affected Vendors** button above the Details bar.
 - a. The PSC MUST SELECT ALL construction contracts for the project so that all contractors may respond if affected or not.
 - b. Each construction contract should only be selected once.
 - c. Once the contracts have been checked click **Select**.

▼ ITEMS

Insert 1 item(s) **Select Affected Vendors**

DETAILS										
<input type="checkbox"/>	Number	Contract	RFP Contact	Activity Code	Description	Estimated Schedule Impact (Days)	Scope of Work	Status	Total	Proj
<input type="checkbox"/>										

- d. Note: If the Due Date was entered before the contracts were added to the line items, the Pricing Due Date in the Items Grid will be auto-filled, if not, it will have to be filled Manually.
15. If any additional details need to be added click on the  icon next to the line item, this will open the Details Panel.
 - a. Use the Previous and Next action buttons to sort through items if needed.
16. Note: DO NOT enter the Estimated Schedule Impact (Days) and Total values in the Items Grid as these will be provided by the Contractors on the Contract.
17. Click **Done** once details have been added.
18. In the next section you can add one or more Justifications for the Issue along with the Amount Percentage and Comments.

▼ JUSTIFICATION

Insert 1 item(s)

<input type="checkbox"/>	Justification	Amount Percentage	Comments
<input type="checkbox"/>			

- a. The Justification Amount Percentage must total to 100 across the lines added.
19. Documents can be attached to the record under the References section. The user can either:

REFERENCES

UPLOAD

ADD KAHUA DOC

EDIT

MARKUP

UPDATE

REMOVE

DOWNLOAD

ADD COMPOSITE

ADD APPROVAL DOC

<input type="checkbox"/>	↓ TYPE	DESCRIPTION	CONTRIBUTOR	DATE	SIZE	MARKUP?	INCLUDE ON SEND	INCLUDE MARKUP ON SEND	IS CURRENT	PREVIEW STATUS	COMMENTS	
--------------------------	--------	-------------	-------------	------	------	---------	-----------------	------------------------	------------	----------------	----------	--

- a. **Upload** a document saved on their computer.
 - b. **Add Kahua Doc** to reference a document that is stored within Kahua's File Manager application.
 - c. **Add Approval Doc** which is used anytime a record is being routed for Review or Signature.
20. Once all details have been filled out, click **Save/Close** or **Save**, then click **Submit** to send to the Contractor with Assigned or Construction Manager (CWA/CM) to Get Pricing from the contractors.
21. If there is no CWA/CM on the project, the PSC can click **Save**, then click the **Get Pricing** button(s) to gather pricing from the contractor(s), and then Submit for Review. They will then complete the Review as outlined in the Review & Approval Process section of the job aid. Once Review is complete it can be Sent for Approval.

Issue Action Buttons

Once the fields within the record have been completed and saved, the users can select from several actions:

SEND EDIT VIEW DELETE HISTORY

- **Send** – Use messaging to send record details to others (NOT to be confused with a workflow)
- **Edit** – Update and maintain the record
- **View** – This action button displays the Portable View (document view)
- **Delete** – Select this action button to delete a record (typically permission based, so all may not see this)
- **History** – All updates/changes are tracked


Send

- Do not confuse **Send** with using the workflow buttons in any application
- Documents can be sent via a message within Kahua to either existing Kahua users or users outside of Kahua by entering their email address and clicking **Enter**
- The documents are treated as attachments, and the message can be copied to the **Communications** application by checking the box

Edit

- The record can be updated as needed during the process
- If the document is out for Review or Signature, **Edit** will not be available

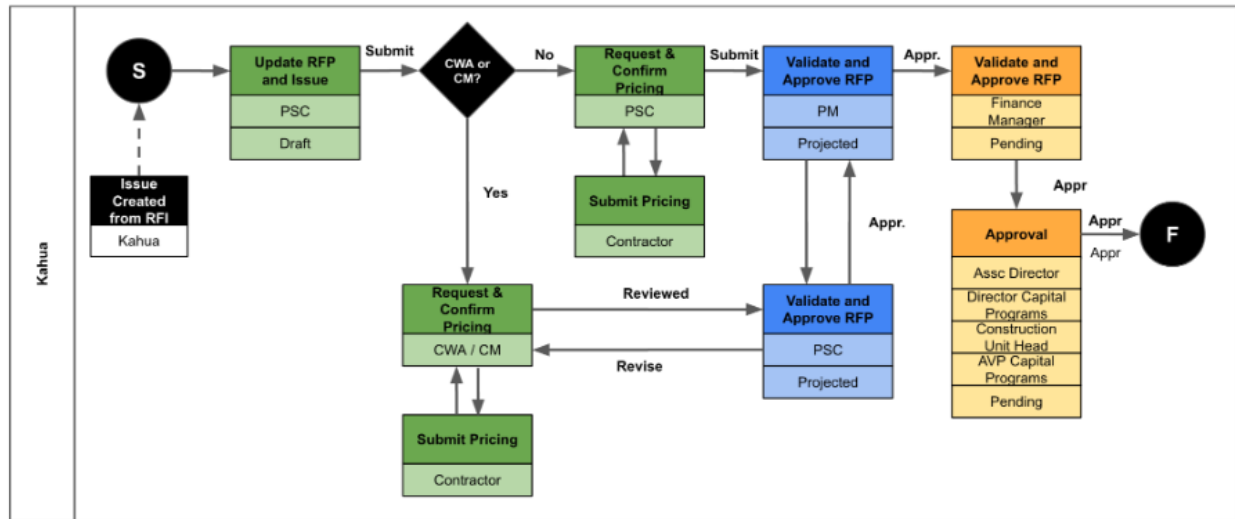
View

- Records can be viewed as a Portable View in which a PDF version of the data is generated and can be printed out. Select the **PDF Icon**  to generate a printable PDF version of the document

History

- The **History** action button provides details regarding all activity (Creation, Updates, Saves, etc.) performed on the record
- To see specific details related to the updates made, click the View Edit button

Workflow - Change Order Type Issue

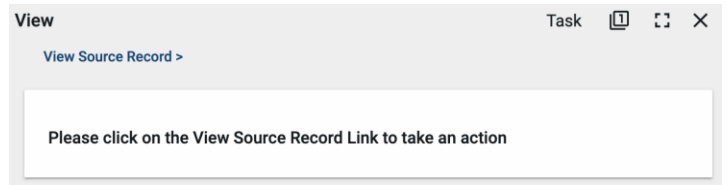


RFP/Issues - Pricing	Category = Change Order	Created from RFI or PSC creates RFP	Originating in Kahua	
Order	Workflow Status	Role Type (Name or Actor)	Approval Threshold	Approval Limit
1	Data Entry	PSC creates/updates the RFP	N/A	N/A
2	Sent for Pricing	If CWA/CM exists on the project, PSC sends RFP for review, if not PSC gets & confirms Pricing	N/A	N/A
3	Get Pricing	CWA/CM verify RFP & go to record to get pricing from Vendors/Contractors	N/A	N/A
4	Confirm Pricing	CWA/CM confirm Pricing received from Contractors	N/A	N/A
5	Sent for Review	CWA/CM sends to PSC for Review	N/A	N/A
6	Reviewed	PSC completes Review of Pricing	N/A	N/A

RFP/Issues - Approval	Category = Change Order	Reviewed RFP & Pricing sent for approval by PSC	Originating in Kahua	
Order	Workflow Status	Role Type (Name or Actor)	Approval Threshold	Approval Limit
1	Sent for Approval	PSC sends Reviewed RFP for Approval	N/A	N/A
2	Approval	Project Manager	N/A	N/A
3	Approval	Financial Manager	N/A	N/A
4	Approval	Associate Director of Capital Programs	> \$25,000	N/A
5	Approval	University Director for Capital Programs	> \$50,000	N/A
6	Approval	University Construction Unit Head	> \$75,000	N/A
7	Approval	Associate Vice President of Capital Programs & Utility Services	≥ \$100,000	N/A
Once RFP/Issue has been Approved, it will be auto processed into a Change Order for each contract and sent to Project Manager, Contract Specialist, and Financial Manager for Approval				

Get Pricing Step – Change Order Type Issue

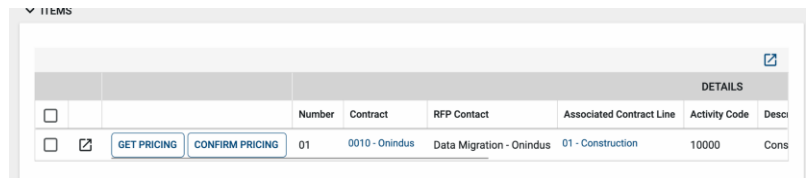
1. When the PSC clicks the Submit button, a Task and an Email will be sent to the CWA/CM, who was auto-filled in the Responsible Contact in the record.
2. Once the Task has been clicked it will ask the CWA/CM to go to the Source Record to start the Get Pricing step.



3. Click the **View Source Record** button to view the Issue/RFP record.
4. Scroll to the Items Grid. Two buttons, **Get Pricing** and **Confirm Pricing**, are displayed next to each contract.

5. Click on the **Get Pricing** Button.

This will automatically create a Task for the Contractor selected in the To Parties section of that Contract.



						DETAILS	
		Number	Contract	RFP Contact	Associated Contract Line	Activity Code	Desc
<input type="checkbox"/>							
<input type="checkbox"/>	<input checked="" type="checkbox"/>	01	0010 - Onindus	Data Migration - Onindus	01 - Construction	10000	Cons

- a. You can also use the Checkbox selector to select all the impacted contracts and then click on the **Get Pricing** Option that is now visible in the header of the grid.
6. Tasks and emails will be sent to the contractors on the selected contracts.

Enter Pricing – Change Order Type Issue

1. The Contractor on the contract will receive a Task and an Email to enter the Pricing as well as the Estimated Schedule Impact (Days).
2. Login to Kahua and click on the Task. A screen similar to the image will be shown.
3. Enter the Estimated Impact in Days and then click on the **Insert** button to add the pricing for the prime and each subcontractor.
4. If the CWA has an Assignment Fee, it will need to be added. It can be added in the “Other” column.

CWAs may need to wait to receive all pricing tasks from Assigned Contractors before determining the fee in their own pricing task.
5. Attach the U of I RFP breakdown form and any other supporting documents that need to be attached in the Reference Section.
6. Once this is done, click on the **Submit Pricing** button.
 - a. Note: If there is no cost click on **No Cost**.
7. The pricing and the days for Assigned Contractors will be sent back to the CWA/CM for confirmation. If there is no CWA/CM, the contractor pricing will be sent directly to the PSC.

View Source Record >

Location	Test Location
Responsible Contact	Akshay Pai - Onindus
Scope of Work	Test Issue
Pricing Requested	3/18/2024
Pricing Due	3/19/2024

▼ REFERENCES

Price

Estimated Schedule Impact (Days)

Insert 1 item(s)

Vendor								
<input type="checkbox"/>	Vendor	Description	Materials	Labor	Other	Total (Calculated)	OH & Profit	Contractor's Mark
Comments								

UPLOAD ADD KAHUA DOC DOWNLOAD

<input type="checkbox"/>	↓	TYPE	DESCRIPTION	CONTRIBUTOR	DATE	SIZE	MARKUP?	INCLUDE ON SEND	INCLUDE
Submit Pricing No Cost									

Confirm Pricing Step – Change Order Type Issue

1. Once the Pricing has been received, the CWA/CM can view the record and see the data entered in the respective columns.
 - a. To see additional details on the Pricing breakdown by Materials, Labor and Other click on the Pop-out button next to the record.
 - b. The section called Vendor Pricing will provide a breakdown of the Pricing.
 - c. To go back to the main record, click **Done** located on the top right of the screen.
2. If the Pricing and the Estimated Schedule Impact received from all contractors are agreeable by the CWA/CM, click on the **Confirm Pricing** button.
3. If not, click on **Request New Pricing** to start the Get Pricing process again.

▼ ITEMS

		DETAILS							
<input type="checkbox"/>	<input type="checkbox"/>	Number	Contract	RFP Contact	Associated Contract Line	Activity Code	Description	Estimated Schedu	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	01	0010 - Onindus	Data Migration - Onindus	01 - Construction	10000	Construction		

4. When the total pricing from all contractors has been confirmed click on the **Submit for Review** button at the bottom of the record, this will send it to the PSC to review.
5. If the PSC is not satisfied with the pricing or the estimated schedule impact, they can send it back for revision.

Issue

- View

View Source Record >

APPROVAL DOCUMENT

1 of 1

77%

UNIVERSITY OF ILLINOIS

CONTRACT RFP

Project:Analysis - UAT Project

U3 Change Order No. : 0009

RFProject No. : 0002

RFP Amount: \$7,000.00

The above referenced contract is hereby amended to provide the following (described) change(s) upon the terms set forth below:

Reason for (Amendment):

Training Guide Demonstration

RF Amendment No.	Contractor	Original Calendar Days to Complete (to Work)	Current Calendar Days to Complete (to Work)	Increase/Decrease in Calendar Days to Complete Due to Proposed Change Order(s)	Revised Substantial Completion Date	Increase/Decrease in Calendar Days to Substantial Completion Due to this Change Order
Training 1	Unitech	3	3	0		0

Contract	Amendment Number	Revised Contract Date	Description	Scope	Original Contract Amount \$	Revised Approved Change Order Amount \$	Net Change Order Amount \$	Grand Total Amount A + B + C
Order Manager	Training 1	0009 Construction	Construction	Training Guide Demonstration	\$100,000.00	\$0.00	\$7,000.00	
Total					\$100,000.00	\$0.00	\$7,000.00	\$107,000.00

As changed herein above, the above referenced contract shall continue in full force and effect.

Justification	Percentage	Comments
PMSC Error	000.00	

Affect project budget and/or scope						
Amendment Number	Chart *	Fund *	Organization *	Account *	Program *	Activity Location
Training 1	2	0101	0003	0011001	PM0	0007 3707

The UNDERSIGNED HEREBY CERTIFY THAT THIS CONTRACT CHANGE ORDER IS PERMANENT TO THE ORIGINAL CONTRACT AS BONDED AND THAT THE CIRCUMSTANCES RE-DESIGNATING THIS CONTRACT CHANGE ORDER WERE NOT REASONABLY FORESEEABLE AT THE TIME THE CONTRACT WAS SIGNED. THIS CONTRACT CHANGE ORDER IS IN THE BEST INTEREST OF THE UNIVERSITY OF ILLINOIS AND IS AUTHORIZED BY LAW (205 ILCS 5.0/6.0)

Contractor Approval

University of Illinois Approval

COMMENTS

Reviewed

Return for Revision

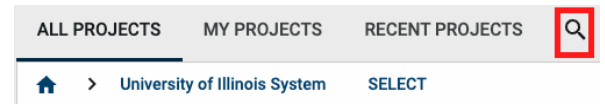
- a. When in the record, scroll to the Items grid to view pricing. To review attached contractor backup/documents, expand the grid by clicking the expand icon to the right of the grid. Then click the View Details icon to the left of each contractor line item. Attachments can be found in the references section of each item.
 - b. The PSC can also enter in their estimated cost in the Details section for the PM review.
4. If all the information provided by the contractor(s) & CWA/CM is agreeable, click back into the task, and then click on the **Reviewed** button.
- a. If Revisions are needed, provide revision notes in the Comments section and click on the **Return for Revision** button.

5. Once the **Reviewed** button is clicked the status will be updated to Review Complete.
6. The PSC can now start the Threshold based Approval outlined on Pages 8 and 9 by clicking on the **Submit for Approval** button
7. Note: Even after the Review has been completed but prior to sending it for Approval the PSC can send it back to the CWA/CM to Resubmit Pricing
8. Once all the Approvals have been received for the Issue/RFP and provided there is a Cost/Schedule Impact, the impacted contracts will be auto-processed into Change Orders and sent to the Project Manager, Contract Specialist, and Financial Manager for Approval.
9. If the Contractors and CWA/CM have been added to the CC notifications, they will receive an email when the Issue/RFP has been approved. If not, the PSC can manually notify them using the **Send** button located at the top of the record.

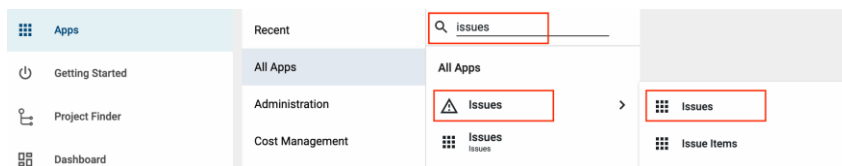
Note: Issue/RFP approval is not the final Change Order approval, which comes later in the approval process. A Change Order must be executed before work can begin unless there is an approved Field Directive for that work.

Create a FD/EWA Type Issue

1. Field Directives (FD) and Emergency Work Authorizations (EWA) will be created using the Issues Application.
2. Issues will be created by the PSC assigned to the Project. To create a new Issue, navigate to the appropriate project and go to the Issues Application.
3. To do this navigate using the Project Finder by:
 - c. Clicking on Project Finder in the left side Navigation;
 - d. Selecting the Project where the Contract was created.
4. You can also use the Search functionality in the Project Finder to locate you project:
 - a. Click on Project Finder in the left side Navigation;
 - b. Click on the Magnifying Glass icon next to Recent Projects, as shown in the image below;
 - c. Type out the Project Name and click on the Project.




5. Once in the project, click on Apps, then All Apps, then search for Issues using the Search Bar.
6. Select the **Issues** application as shown in the image, then click the **New** button to create a new Issue.
7. A new form will open on the right side of the screen.
8. Under Category, select either Field Directive or Emergency Work Authorization. This is a required field.
9. Populate the Details such as Date, Description, etc.
10. If the project has a Contractor with Assigned (CWA) or Construction Manager (CM) on the project listed in the project Roster, their name will automatically populate in the Responsible Contact Field. If there is



no CWA/CM on the project, the PSC should insert their name as the Responsible Contact.

11. The PSC can add the contractors to the CC Notification field in the Details section of the Issue so that they will be notified when the Issue has been approved.
12. In the Scope section enter the:
 - a. Estimated Schedule Impact (Days)
 - b. Scope of Work (Required Field)
13. In the Dates & Workflow section enter the Due Date.
14. In the Items section click on the **Select Affected Vendors** button above the Details bar.
 - a. The PSC MUST SELECT ALL construction contracts for the project so that all contractors may respond if affected or not.
 - b. Once the contracts have been checked click **Select**.

DETAILS										
	Number	Contract	RFP Contact	Activity Code	Description	Estimated Schedule Impact (Days)	Scope of Work	Status	Total	Proj
<input type="checkbox"/>										

- c. Note: If the Due Date was entered before the contracts were added to the line items the Pricing Due Date in the Items Grid will be auto filled, if not it will have to be filled Manually.
15. If any additional details need to be added click on the  icon next to the line item; this will open the Details Panel.
 - a. Use the Previous and Next action buttons to sort through the Items if needed.
 - b. DO NOT enter the Estimated Schedule Impact (Days) and Total values in the Items Grid as these will be provided by the Contractors on the Contracts.

16. Click **Done** once details have been added.
17. In the next section you can add one or more Justification(s) for the Issue along with the Amount Percentage and Comments

JUSTIFICATION

Insert 1 item(s)

	Justification	Amount Percentage	Comments
<input type="checkbox"/>			
<input type="checkbox"/>			

- a. Note: The Justification Amount Percentage must total to 100 across the lines added

18. Documents can be attached to the record under the References section. The user can either:

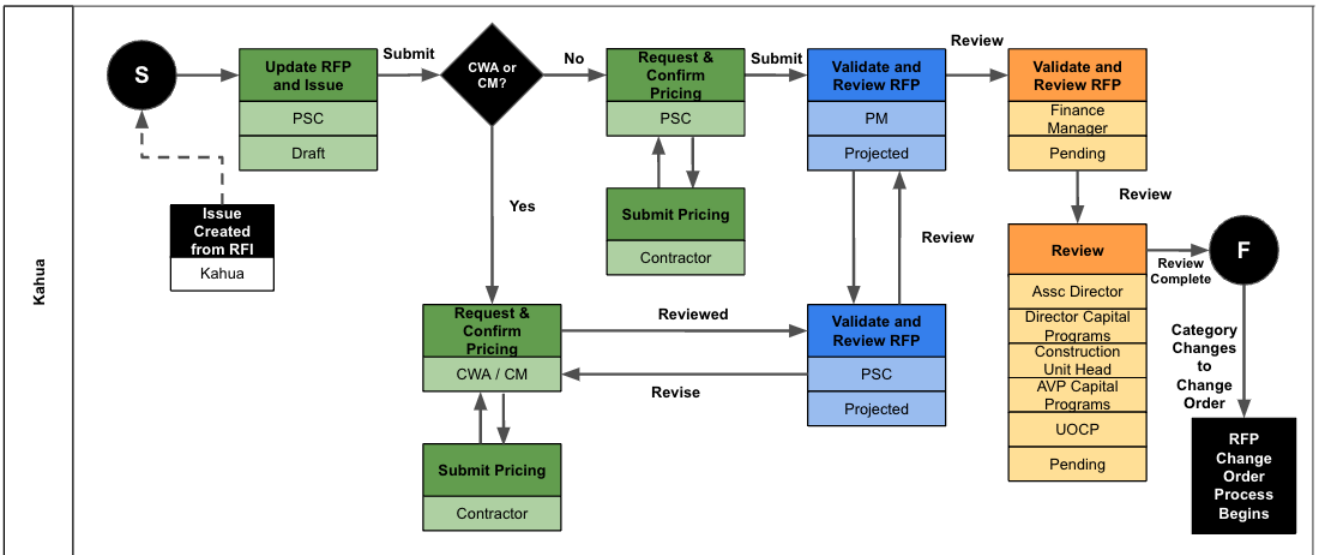
REFERENCES

UPLOAD ADD KAHUA DOC EDIT MARKUP UPDATE REMOVE DOWNLOAD ADD COMPOSITE ADD APPROVAL DOC

<input type="checkbox"/>	↓ TYPE	DESCRIPTION	CONTRIBUTOR	DATE	SIZE	MARKUP?	INCLUDE ON SEND	INCLUDE MARKUP ON SEND	IS CURRENT	PREVIEW STATUS	COMMENTS

- a. **Upload** a document saved on their computer.
 - b. **Add Kahua Doc** to reference a document that is stored within Kahua's File Manager application.
 - c. **Add Approval Doc** which is used anytime a record is being routed for Review or Signature.
19. Once all details have been filled out, click **Save/Close** or **Save** and then click on **Submit** to send to the CWA/CM to Get Pricing from the Contractors.
20. If there is no CWA/CM on the Project, the PSC can click **Save**, then click the **Get Pricing** buttons to gather pricing from the contractor, and then Submit for Review.

Workflow - FD/EWA Type Issue



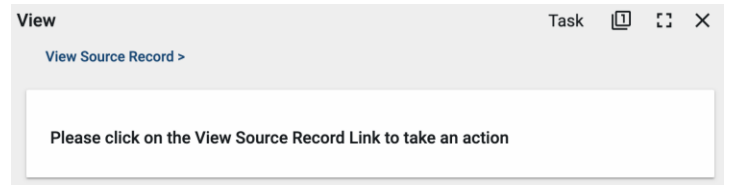
RFP/Issues - Approval	Category = FD/EWA	FD/EWA Sent for Pricing & Review	Originating in Kahua	
Order	Workflow Status	Role Type (Name or Actor)	Approval Threshold	Approval Limit
1	Data Entry	PSC creates/updates the RFP	N/A	N/A
2	Sent for Review	If CWA/CM exist on the project, PSC sends RFP for pricing, if not PSC gets & confirms Pricing	N/A	N/A
3	Get Pricing	CWA/CM verify RFP & go to record to get pricing from Vendors/Contractors	N/A	N/A
4	Confirm Pricing	CWA/CM confirm Pricing received from Contractors	N/A	N/A
5	Review	CWA/CM starts the review process	N/A	N/A
6	Review	PSC	N/A	N/A
7	Review	Project Manager	N/A	N/A

8	Review	Financial Manager	N/A	N/A
9	Review	Associate Director of Capital Programs	>\$25,000	N/A
10	Review	University Director for Capital Programs	>\$50,000	N/A
11	Review	University Construction Unit Head	>\$75,000	N/A
12	Review	Associate Vice President of Capital Programs & Utility Services	≥ \$100,000	N/A
13	Review	UOCP	> \$100,000	N/A

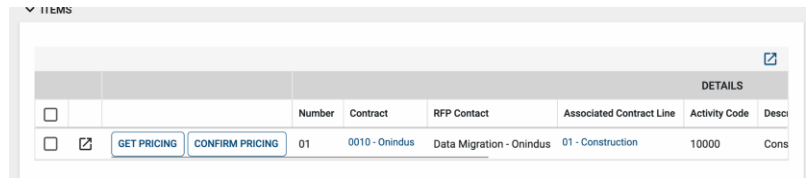
Once Field Directive/EWA Review is complete, the Issue Category will auto change to Change Order & it will follow the Change Order Type Issue Review & Pricing Workflow

Get Pricing Step - FD/EWA Type Issue

1. When the PSC clicks the **Submit** button, a Task and an Email will be sent to the CWA/CM, who was auto-filled in the Responsible Contact in the record. If there is no CWA/CM, the PSC will have already completed the Get Pricing in the last step.



2. Once the CWA/CM clicks the Task, it will ask the CWA/CM to go to the Source Record to start the Get Pricing step.
3. Click the **View Source Record** button to go to the Issue record.
4. Scroll to the Items Grid where you can see two buttons next to each impacted contract.



						DETAILS	
		Number	Contract	RFP Contact	Associated Contract Line	Activity Code	Desc
<input type="checkbox"/>		01	0010 - Onindus	Data Migration - Onindus	01 - Construction	10000	Cons

5. Click on the **Get Pricing** Button.
This will automatically create a Task for the Contractor selected in the To Parties section of that Contract.
 - a. You can also use the Checkbox selector to select all construction contracts and then click on the **Get Pricing** Option that is now visible in the header of the grid.
6. Tasks along with emails will be sent to the Contractors on the impacted contracts.

Enter Pricing - FD/EWA Type Issue

1. The Contractor on the contract will receive a Task and an Email to enter the Pricing as well as the Estimated Schedule Impact (Days).
2. Login to Kahua and click on the Task; a screen similar to the image will be shown.
3. Enter the Estimated Impact in Days and then click on the **Insert** button to add the pricing for yourself and each of your subs.
4. Attach the U of I RFP breakdown form, if used, and any other supporting documents that need to be attached in the Reference Section.
5. Once this is done, click on the **Submit Pricing** button.
 - a. Note: If there is no cost click on **No Cost**.
6. The pricing and the days will be sent back to the CWA/CM for confirmation.

The screenshot shows the 'View Source Record >' page in the Kahua system. It contains a metadata section with fields for Location, Responsible Contact, Scope of Work, Pricing Requested, and Pricing Due. Below this is a 'REFERENCES' section with a search bar. The 'Price' section features a red-bordered input field for 'Estimated Schedule Impact (Days)' and a red-bordered 'Insert' button next to a quantity field set to '1'. Below these is a table with columns for Vendor, Description, Materials, Labor, Other, Total (Calculated), OH & Profit, and Contractor's Mark. A 'Comments' section follows. At the bottom, there are buttons for 'Submit Pricing' and 'No Cost', and a table with columns for TYPE, DESCRIPTION, CONTRIBUTOR, DATE, SIZE, MARKUP?, INCLUDE ON SEND, and INCLUDE.

View Source Record >

Location	Test Location
Responsible Contact	Akshay Pai - Onindus
Scope of Work	Test Issue
Pricing Requested	3/18/2024
Pricing Due	3/19/2024

▼ REFERENCES

Price

Estimated Schedule Impact (Days)

Insert 1 item(s)

Vendor								
<input type="checkbox"/>	Vendor	Description	Materials	Labor	Other	Total (Calculated)	OH & Profit	Contractor's Mark
Comments								

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<input type="checkbox"/>	↓	TYPE	DESCRIPTION	CONTRIBUTOR	DATE	SIZE	MARKUP?	INCLUDE ON SEND	INCLUDE
Submit Pricing No Cost									

Confirm Pricing Step - FD/EWA Type Issue

1. Once the Pricing from all contractors has been received, the CWA/CM can view the record and see data entered in the respective columns.
 - a. To see additional details on the Pricing breakdown by Materials, Labor and Other please click on the Pop-out button next to the record.
 - b. You will see a section called Vendor Pricing which will provide a breakdown of the Pricing.
 - c. To go back to the main record, click **Done** located on the top right of the screen.
 - d. In the main record, the CWA/CM can click **Edit**, then enter the total Not To Exceed pricing in the Scope section for reference.
2. If the Pricing and the Estimated Schedule Impact received from all contractors is agreeable by the CWA/CM, click on the **Confirm Pricing** button.
3. If the pricing and schedule impact is not acceptable, click on the **Request New Pricing** button to start the Get Pricing process again.

▼ ITEMS

		DETAILS							
<input type="checkbox"/>	<input type="checkbox"/>	Number	Contract	RFP Contact	Associated Contract Line	Activity Code	Description	Estimated Schedule	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	01	0010 - Onindus	Data Migration - Onindus	01 - Construction	10000	Construction		

4. When the total pricing from all contractors has been confirmed click on the **Submit for Review** button at the bottom of the record, this will start the Field Directive/Emergency Work Authorization Threshold based Review Workflow outlined on Pages 18-19.

Review Process - FD/EWA Type Issue

1. When the Threshold based Review process is started, a Task and Email will be sent first to the PSC to review the Pricing and Estimated Schedule Impact.
2. When the PSC clicks the Task, a screen similar to the image will be displayed.
3. To view the record in the app click **View Source Record**.
4. When in the record, scroll to the Items grid to view pricing. To review attached contractor backup/documents, expand the grid by clicking the expand icon to the right of the grid. Then click the View Details icon to the left of each contractor line item. Attachments can be found in the references section of each item.
5. If all the information provided by the Contractor & CWA/CM is agreeable, click on the **Reviewed** button.
 - a. If revisions are needed, click on the **Return for Revision** button.
6. Once the PSC clicks the **Reviewed** button, the Issue will be sent to the next Reviewer in the process.
7. Once all the Reviews are complete for the FD/EWA, the PSC can notify the Contractors accordingly.
 - a. If the Contractors and CWA/CM have been added to the CC notifications they will receive an email when the FD/EWA has been reviewed.

View

View Source Record >

▼ APPROVAL DOCUMENT

1 of 1 77%

UNIVERSITY OF ILLINOIS
CONTRACT RFP

Project: Aalto - UAT Project UAT Change Order No. 10000
 UAT Project No. 1000 RFP Awarded: \$1,000,000

The above referenced contract is hereby amended to provide the following described change(s) upon the terms set forth below:

Reason for Urgency:

Training Guide Demonstration

UAT	Contractor	Original Contract	Original Contract	Original Contract	Original Contract	Original Contract	Original Contract
Reference	Contract	Step to Complete	Step to Complete	Step to Complete	Step to Complete	Step to Complete	Step to Complete
Number	Number	By Date	By Date	By Date	By Date	By Date	By Date
Training 1	Contractor	3	3	3	3	3	3

Contract	Reference	Description	Scope	Original Contract	Original Contract	Original Contract	Original Contract
Number	Number	Number	Number	Number	Number	Number	Number
Number	Number	Number	Number	Number	Number	Number	Number
Training 1	Contractor	1000 Construction	Construction	\$100,000.00	\$0.00	\$100,000.00	\$100,000.00
Training 1	Contractor	1000 Construction	Construction	\$100,000.00	\$0.00	\$100,000.00	\$100,000.00
Total				\$100,000.00	\$0.00	\$100,000.00	\$100,000.00

As changed here in above, the above referenced contract shall continue in full force and effect.

Justification	Percentage	Comments
PSC Error	100.00	

Affects project budget and/or scope

Contractor Number	Contract	Project	Organization	Account	Program	Activity	Location
Training 1	Contractor	2	P 10	000	001001	Phd	4007

THE UNDERSIGNED HEREBY CERTIFY THAT THIS CONTRACT CHANGE ORDER IS NECESSARY TO THE ORIGINAL CONTRACT AS BIDDING AND THAT THE CIRCUMSTANCES NECESSITATING THIS CONTRACT CHANGE ORDER WERE NOT REASONABLY FORESEEABLE AT THE TIME THE CONTRACT WAS BIDDING. THIS CONTRACT CHANGE ORDER IS IN THE BEST INTEREST OF THE UNIVERSITY OF ILLINOIS AND IS AUTHORIZED BY LAW (200 ILCS 5.0/5.030-10)

Contractor Approval: University of Illinois Approval

▼ COMMENTS

Reviewed Return for Revision

- b. If not, the PSC can manually notify them using the **Send** button located at the top
- 8. Note: Once the Review has been completed the Category in the record will automatically update to “Change Order”. If the PSC wants to restart the FD review again for any reason, they will click **Resubmit for Review**. If the PSC is ready to send the Issue through for RFP/Change Order Type Issue pricing and approval steps, they will click **Get CO Pricing**. The PSC can then use the steps outlined in the Change Order Type Issue guide to go through the process when ready for contractors to submit finalized pricing.