



OFFICE OF THE UNIVERSITY ARCHITECT

GMP AMENDMENT PROCEDURE IN OAKSCI

After drawings, estimates, information discussed at meetings, etc. are entered and approved under Design Reviews, a GMP Amendment can be entered. This is similar to a Change Order and is actually started under the Change Order Process. The GMP Amendment will be finalized outside of OAKSCI and will be entered after all documentation has been signed.

Contract Administrator Starts:

Step One: The Contract Administrator will have already uploaded the required and fully executed documentation for the GMP Amendment into Document Manager – Construction – Contracting. New folders may need to be set up to differentiate documentation for each amendment. They will all be listed under the Contracting folder.

Step Two: Contract Administrator will go to Logs – Change Orders and then will choose GMP Amendment v2.2.

- A title for this amendment will be entered. These will be numbered sequentially, (GMP Amendment No. 1, No. 2, etc.)
- At Contract Reference, they will use the drop-down Select button to add the Construction Manager's contract. At this point, portions of the contract will populate into select fields.
- All lines with an asterisk will need to be filled in.

The screenshot shows the 'General' tab of the OAKSCI system. The 'Title' field is highlighted with a callout box stating 'Title will be GMP Amendment No. 1 and so on.' The 'Contract Reference' field is a dropdown menu with the text 'Type a Contract No...'. The 'Change Order Type' is set to 'GMP Amendment'. The 'Change Order No.' field is empty. The 'Record Number' field is empty. The 'Creator' is 'Cindy Pizzuto'. The 'Trade' field is empty. The 'Contractor Name' field is empty. The 'EDGE Certified Prime?' field is empty. The 'Fee Title' field is empty.

		Contingency % Cap	0
DB Construction Design Services Fee % Cap		CM/DB Fee % Cap	0
Cost of the Work (\$)	\$0.00		
<div style="border: 1px solid black; padding: 5px; display: inline-block;"> Fill in all lines that have a red asterisk. These figures will be on the executed Amendment. </div>	Construction Stage Personnel Costs (\$)	Construction Personnel Cost Cap (\$)	\$0.00
	General Conditions Costs (\$)	General Conditions Costs Cap (\$)	\$0.00
	Subcontracted Work (\$)		
	Self-Performed Work (\$)		
	Contingency (\$)	Contingency Cap (\$)	\$0.00
DB Construction Design Services Fee (\$)		DB Construction Design Services Fee Cap (\$)	\$0.00
CM/DB Fee (\$)		CM/DB Fee Cap (\$)	\$0.00
Contract Sum (\$)	\$0.00	Total Amount (\$)	\$0.00
		Line Item Total (\$)	\$0.00
		Difference (\$)	\$0.00

Enter the agreed to Contract Time. The Proceed Date will be entered at a later step.

Proceed Date

Contract Days - Final Acceptance *

GMP Completion Date

- Click on Attachments and add all the required documentation for this GMP Amendment.
- Click on Change Order Basis, use the drop down and select GMP Amendment.
- Click on Send, then Workflow Actions will be Submit, then Send. This will send the GMP Amendment to the Construction Manager for review.

Note: Construction Design Services Fee block is only used on a Design Build Project. LEAVE BLANK ON CM-R PROJECT.

Step Three: Contractor will Accept the task.

- The Contractor will review the General Section of this amendment. No changes can be made to this section.

Step Four: Contractor will click on Line Item List, then click the Add button.

Step Five: A new box appears.

Step Six: Skip the Reference line and go straight to the WBS Code line.

- Just start typing in the description of the WBS Code, or the WBS Code itself.
- Enter a short description for this WBS Code.
- Enter the dollar amount.
- Click on Save & Add New.
- Continue to click on the Save & Add New button and putting in each WBS Code that is needed and entering the dollar value.
- The amount of all line items that are listed should match the Total Amount line in the General section.
- Click on Send, then Workflow Actions will be Submit, then Send. This will send the GMP Amendment to the Project Manager for review.

Step Seven: Project Manager Review.

- Project Manager will **Accept** the Task.
- Project Manager will review the **Title**.
- Project Manager will check the **Line Item List** and make sure the proper WBS code is used and the Subcontractor or Supplier is listed on the proper line. Project Manager cannot make changes; they can only review.
- Project Manager will add the Change Order No.

The screenshot shows a form for a GMP Amendment. It has two columns of fields. The left column contains: 'Title' (text box with 'Amendment No. 1'), 'Contract Reference' (text box with 'CMR-01'), 'Change Order Type' (dropdown menu with 'GMP Amendment'), and 'Change Order No. *' (text box). The right column contains: 'Trade' (text box with 'CM at Risk'), 'Contractor Name' (text box with 'Joe General Contractor'), 'EDGE Certified Prime?' (text box with 'Yes'), and 'Fee Title' (text box). Below these is a 'Contingency % Cap' field. A callout box with a black border and a pointer to the 'Change Order No. *' field contains the text: 'PM will enter the Change Order No.'

- Click on Send, then Workflow Actions will be Approve then Send. This will send the GMP Amendment to the Contractor for signature.

Step Eight: Contractor will **Accept** the Task review all information.

- Contractor will do a final check of all numbers and information. No changes can be made at this time.
- Click on Send, then Workflow Actions will be Signed, then Send. This will send the GMP Amendment to the Project Accounting person for Validation.

Note: The GMP Amendment will be signed outside of OAKSCI, there will be no need to print the GMP Amendment in OAKSCI. The signed copy will have been attached by the Contract Administrator in Step One.

Step Nine: Accounting Validates the Change Order/Amendment.

- Accounting **Accepts** the Task.
- Checks that all GMP Documentation is attached and the GMP Amendment has been signed by all parties.
- Checks the WBS codes to ensure they are correct.
- Checks that if a Subcontractor or Supplier is used, that they are coded correctly on the WBS codes.
- Click on Send, then Workflow Actions will be Validated, then Send. This will send the GMP Amendment to the Contracting Authority (Director) for Signature.

Step Ten: Director reviews.

- Director **Accepts** the task.
- Reviews the change order/amendment.
- Click on Send, then Workflow Actions will be Signed, then Send. This will send the GMP Amendment to the Project Accounting person for Funding.

Step Eleven: Project Accounting Person will certify funding.

- First the Project Accounting person will edit existing PO to add funds for Amendment.
- Go into the GMP Amendment and **ACCEPT the Task**.
- Under PO Record, select the correct PO from the drop down. Assign State or Local Funds.
- The GMP Amendment is now Approved.
- Click on Send, then Workflow Actions will be Funded, then Send. This will send the GMP Amendment to the Contract Administrator for issuing the Notice to Proceed.

Step Twelve: Contract Administrator will Accept the task.

- Will enter in the Proceed Date.

The screenshot shows a software interface with a light purple background. On the left, a black-bordered callout box contains the text: "Enter the Notice to Proceed Date. The GMP Completion Date will auto-populate." A line from the top-right corner of this box points to a date input field. The input field is labeled "Proceed Date *" in bold black text. Below the label, the field contains the placeholder text "MM/DD/YYYY HH:MM AM" and a calendar icon on the right. Below this field, there are two more sections. The first is labeled "Contract Days - Final Acceptance" in bold black text, followed by a light purple bar containing the number "89". The second is labeled "GMP Completion Date" in bold black text, followed by another light purple bar and a calendar icon on the right.

- The GMP Completion Date will auto-populate.
- Click on Send, then Workflow Actions will be Notify, then Send. This will send the GMP Amendment to End and the GMP Amendment will now be Complete.