Change Request Process – Centric Project

Change Requests are issued utilizing the tracked activity feature in Centric Project. The process is defined as follows:

a. Initiation of CR by ISU
b. Step 1 – Pricing
c. Step 2 – Price Review - Design Professional
d. Step 3 – Price Review - ISU
e. Step 4 – Final ISU Action and Record

When the project is set up, specific participants are defined for the approval process for each step. One or more individuals may be designated for each step as well as whether action by any or all of the designated participants is required to move to the next step. Each time an action is taken, a user name and password must be entered as authentication – authenticating the action serves as an electronic signature. Each action taken on the CR along with any comments made are recorded with the CR history.

A participant has several options at each step:

a. Approve – Moves the CR to the next step in the process. Any comments that are necessary with the approval may be added.
b. Return – Returns the CR to ISU to be revised, corrected, or voided. The only instance when this would be used is when an error in the CR has occurred or the CR will be cancelled.
c. Recycle – Returns the CR to a previous step in the process with appropriate comments. The CR will then resume the process at the recycled point – to move it to the next step, select Approve. (e.g. if either the Design Professional or ISU would like pricing to be revised or clarified, the CR would be recycled back to Step 2 – Contractor Pricing)
d. Save with Note – Used to add comments to the CR History without advancing the CR to the next step OR if input from other members of the project team is required. When Save with Note is selected, Contributors may be added to the CR process. The CR will be added to the “My Activities” tab on the Dashboard of anyone designated as a contributor and they may be added to the notification email that is generated. (e.g. the design professional could request input on pricing from sub consultants by adding them as a contributor.) Note: Contributors cannot approve the CR to move it to the next step. They may only provide input to the participants designated for approval of the step.
1. The document utilized to request pricing from the Contractor is a Change Request (CR). Change Requests may be issued in two forms: Request for Proposal or Time and Material Work Order. The Request for Proposal requests pricing as a lump sum proposal and work should not proceed until pricing is approved. The Time and Material Work Order authorizes the Contractor to proceed upon receipt and time and material expenditures are kept and tracked and submitted approval after work has been completed.

2. The Design Professional may not issue changes to the Contractor. All changes must be authorized by the Owner’s Representative and only the Owner’s Representative may issue change requests.

3. ISU will initiate the CR in Centric Project. The CR will be routed to the designated Contractor participant(s) (Step 1 – Pricing) and an email notification will be automatically generated.

4. The Contractor should prepare pricing for the requested change, include the pricing as an attachment and approve the CR. Once it is approved, the CR will automatically be routed to the designated Design Professional participant(s) (Step 2 – Design Professional Review) and an email notification will be sent to the Design Professional.

5. The Design Professional should review the submitted pricing. If there are questions or concerns with the pricing, the CR should be Recycled back to the Contractor with the appropriate comments. The CR will automatically be routed back to the Contractor and an email notification will be sent. If the Design Professional wishes to solicit input from sub consultants or other members of the project team, they should be added as contributors by selecting Save with Note. Once the desired input has been received, the CR must be Approved. If the Design Professional recommends accepting the pricing, the CR should be Approved and the CR will automatically be routed to ISU (Step 3 – ISU Review) and an email notification will be sent.

6. ISU will review the submitted pricing. If there are questions or concerns with the pricing, the CR will be Recycled back to either the Design Professional or Contractor with the appropriate comments. The CR will automatically be routed and an email notification will be sent. If ISU recommends accepting the pricing, the CR will be Approved and the CR will automatically be routed to the ISU Project Administrator (Step 4 – ISU Final Action) and an email notification will be sent.

7. The ISU Project Administrator will record the Approval of the CR and complete the processing of the Change Request. At this point the CR Log will indicate the CR is closed.