This instruction covers creating and submitting a lump sum CORAF which is the most common type. The system will allow submission of time & materials, unit price and (addition of) alternate CORAFs. There are slight variations during the creation phase of each type, however, accessing, starting and general setup are all very similar.

A. Introduction

1. It is the GC’s responsibility to create and submit CORAFs through UA’s system
2. Awarded Contract for each project must be setup by UA project manager before system will allow CORAF creation and submission
3. See Article 19 of UA General Conditions for additional information related to changes to your contract

B. Creating and Submitting Change Order Request Approval Form (CORAF)

1. Access eCORAF List to start process
   a. Access My Everest Quick Links through Estus Project Site
   b. Click on “eCORAF List”
      1) Login to Everest using MyBama LDAP credentials, if required
         a) Contact UA PM with any questions related to credentials or ability to login
      c. Click “Add” button in top left corner of screen to start new CORAF

2. Create CORAF – General Setup Steps
   a. Input CA Filing Code (UA Project No.) and select Project Phase (if applicable)
      1) CA Filing Code must be input using the format shown in input field (xxx-xx-xxx)
      2) CA Filing Code field is case sensitive for projects with letters in code (e.g. UTL, etc.)
      3) Select “NA” for Project Phase if phase is not applicable

   b. Once CA Filing Code is input and Project Phase is selected, additional project information should automatically show in expanded section below – Project Name, A/E, UA PM & GC Info
      1) If project information does not appear to be correct, there may be an issue with the CA Filing Code input or Project Phase selection. Contact UA project manager with any questions related to this information.
      2) Click “Next” to proceed forward

   "CORAF List"
   "Change Order Request Approval Form (CORAF)"

   "My Everest Quick Links"
3. Change Order Request Approval Form
   a. Primary summary page for the CORAF that will show description(s), total cost summary, time
      extension requests, comments from GC and reviewers, approvals by reviewers and final
      execution (once complete).
   b. Project Information Section
      1) All information shown in this section is automatically generated and read only status
         with the exception of the time extension section
      2) Time Extension
         a) Input time extension request associated with your CORAF, if applicable, and click
            “Update” button
            - Note: Time extension requests require supporting documentation for approval
            consideration (e.g. critical path schedule impact) – See Section B.3.d.2)b) below
            for instructions on how to add supporting attachments
   c. Change Order Summary Section
      1) The system will allow each CORAF to include multiple Change Order Requests (COR’s).
         It is recommended to keep CORAFs simple and include only one COR per CORAF which
         typically improves the review and approval turnaround time.
      2) Click “Add” to begin process of adding COR
      3) Change Order Request Type
         a) Select COR type - Lump Sum (for this instructional document)
         b) Select COR origin - Price Request, ASI or N/A
         c) Input COR origin number, if applicable
         d) Input description of COR
            - Please take the time to clearly describe your change order request
            - CORAFs which include vague or unclear descriptions will be rejected back to GC
              for improvement
         e) Select “Next” to move forward
   d. Change Order Request
      1) Primary summary page for the COR that will show description, GC self-performed cost
         summary, itemized subcontractor cost summary, and total COR cost
      2) Select “GC Self-Performed Costs” button in General Contractor section to add costs
         associated with self-performed work (if applicable)
         a) General Contractor Costs
            - GC OH&P is defaulted to 10% which is typical for additional work performed by
              general contractor. OH&P field is editable for scenarios where a lesser OH&P is
              allowed by UA General Conditions or negotiated as such
            - Input description of work specific to GC self-performed
b) Attachments

- Click “Add” to attach supporting documents

- Attach file as shown, add description of attachment, click “Save” to complete
  - Include clear descriptions of attachments in order for reviewers to easily identify attachments they would like to review
    - E.g. “Supplier XYZ Door Hardware Quote”
    - Descriptive attachment file names are also helpful

- Once attachments have been added, they will be listed in the attachment section of the cost screen as shown below

- Repeat the attachment process above to add all attachments necessary to support costs

c) Material Costs

- Click “Add” button to add material cost line item
- Input description, quantity, unit of measure and unit cost
- Click “Add” button again to complete cost extension of material line item
- Repeat until all material items have been input

d) Labor Costs

- Click “Add” button to add labor cost line item
- Labor cost section requires identification of labor category and classification from a database of options
- Select the category and classification that best fits the work to be performed
- Input hours, type (regular or premium) and rate per hour
  - Individual rates are required - crew rates will be rejected
  - Rates should reflect direct labor rates
    - UA will question rates that do not appear to be direct labor rates or reasonable for Tuscaloosa market.
    - Verification may be requested to support direct rates shown
- Click “Add” button again to complete cost extension of labor line item
- Repeat until all labor items have been input
- Input approved labor burden
  - Using a labor burden greater than what has been previously approved by UA Contract Administration will result in rejection of CORAF
  - Contact UA project manager if you do not know your approved labor burden

d) Equipment
  - Similar to labor section above, equipment type must be selected from a database of options
  - Select the type that best fits work to be performed
  - Input additional description in 2nd section, if necessary
  - Input quantity, unit of measure and unit cost
  - Click “Add” button again to complete cost extension of equipment line item
  - Repeat until all equipment items have been input

f) Total GC Costs will be progressively calculated in the lower right corner of the screen

g) Once all GC Costs have been added, click “Back to COR” button to return to COR summary screen
  - Note: Using your browser’s back button may cause you to exit the system

3) Adding Subcontractor(s) Costs
a) Click “Add” button to add costs associated with subcontract work

b) Subcontractor Costs
  - Select Subcontractor
    - Once your subcontractor has been selected, their approved labor burden on file with UA Contract Administration will automatically populate for use
    - Click “Add Subcontractor” button if you do not see your subcontractor listed in the database
    - If you add a subcontractor, the system will use a default labor burden of 20%
      - Labor burden for added subcontractor can be submitted to UA project manager any time for review, approval and addition to system database
  - Input description of work specific to selected subcontractor
  - Default OH&P shows 10% for party performing subcontract work plus additional 5% for GC, for a total of 15%
    - 15% OH&P is the maximum allowed over direct cost by UA General Conditions. Editing OH&P will be subject to review and likely rejection, unless agreed upon otherwise.
• Tier 2 subcontract costs - Be sure to use direct cost for work to be performed, not total cost. Adding OH&P to tier 2 subcontractor total cost does not comply with UA General Conditions and will result in rejection of CORAF.

- Refer to Section B.3.d.2)b) above to add attachments, material, labor and equipment costs.

- Miscellaneous Notes:
  • At a minimum, total cost verification from each subcontractor must be attached. Additional support may be required and may be requested by project team during the review process.
  • If subcontractor has provided a detailed, itemized cost breakdown, it is not necessary to re-create every line item within system. You are allowed to enter 1 line item in each section that summarizes all direct costs (material, labor and /or equipment), then attach detailed breakdown that supports costs.

- Once all subcontractor costs have been entered, click “Back to COR” button at bottom of screen to return to COR summary screen

c) Repeat steps shown above to add as many subcontractor costs as necessary

4) Once all COR costs have been captured (GC self-performed and subcontractor), click “Back to CORAF” button at the bottom of the screen to return to main CORAF summary screen

e. Any information entered or attached to this point can be edited. Simply double click on COR item (or single click, then click “Edit”) to re-enter COR sections of system to make edits.

1) This editing method will apply to all entry items throughout system

f. Tip: Adding comments in the bottom section can be very helpful in expediting review and approval of your CORAF

1) E.g. Please review and respond no later than Friday, x/xx/xx to allow subcontractor to complete work over the weekend

g. Once CORAF is complete, click “Submit” at the bottom of the CORAF summary page. See routing and approval information in next section.

C. CORAF Approval Routing

Submitted by GC → Architect/Engineer → UA Project Manager → UA Estimator (situational) → UA Senior Project Manager → Executive Director for Construction Administration → Contract Administration

1. You (GC) will receive an email notification once your CORAF has been approved which will include a PDF of the main CORAF summary page showing all reviewer approvals at the bottom

2. If an issue is identified with your CORAF by any reviewer, it may be rejected. If rejected, you will receive an email notification stating such. You will access your rejected CORAF through the link
provided in the email notification and will correct per the comments provided by the reviewer using the same process as detailed above.

a. Reminder: When you open a CORAF that is in process at any stage, please review the Comments section to fully understand the history of the CORAF

D. Checking Status of CORAF

1. Access eCORAF List as described in section B.1 above
   a. Estus Project Site → Everest Quick Links → eCORAF List

2. Your eCORAF List will provide the status of all CORAFs associated with your projects.
   a. Your List can be filtered by several fields such as project number
   b. Your List will also allow you to download a copy of all executed CORAFs
   c. Please note that CORAFs accessed through your eCORAF List are in view only mode, meaning no edits or changes can be made.