# Vendor

# Submitting Online Change Request

**Overview: Vendors** that believe that there has been a change that affects the contract price or time, can submit a request for change through PM Web using an Online Change Request record.  Vendors must include suitable justification to justify the change in the attachment tab.
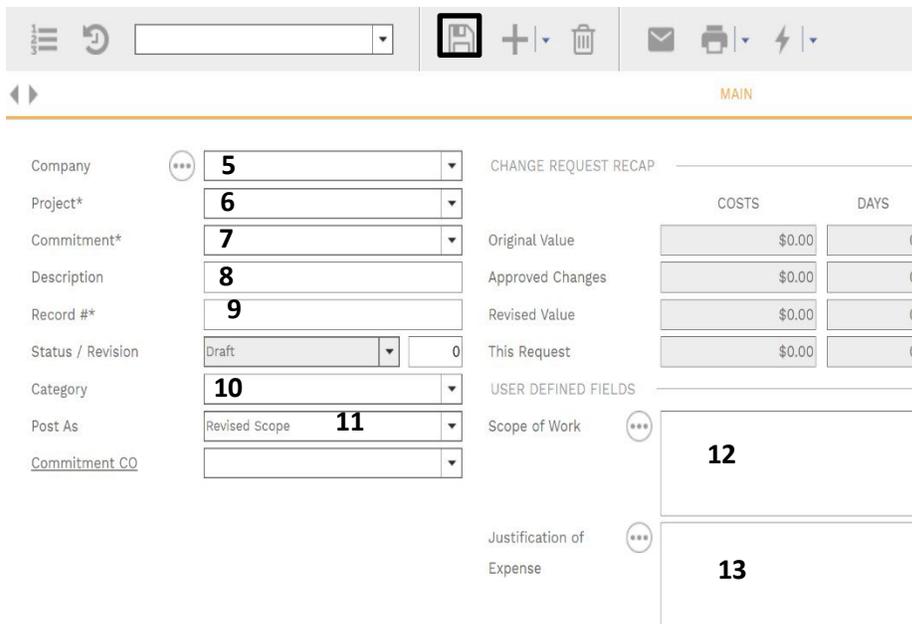
**Reference:** n/a

1- For PAEA, PCCEA, PDCA, PPCO and PGMP, complete the appropriate worksheet template per the instructions provided on the first tab of the worksheet. Attache templates to the record. Templates are available on the UH FPC Vendor Resources page.

2- Click on **Cost Management**



3- Click on **Online Change Requests.**
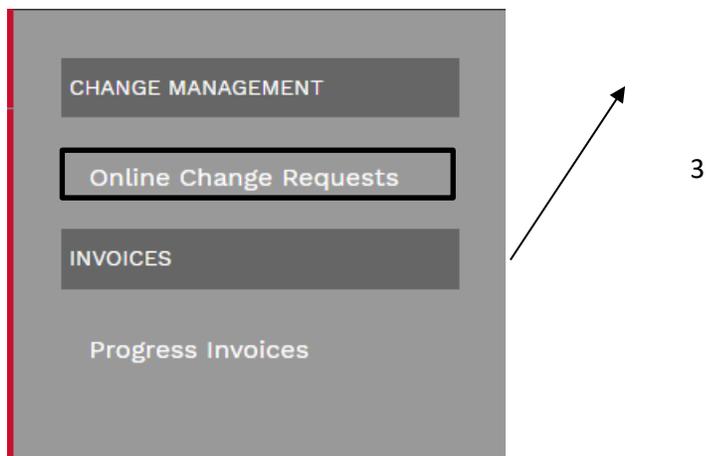
**4-** Click on the ⊞ **+Add** button.

| ☰ ↺ [              ▾] | 💾 ＋｜▾ 🗑 | ✉ 🖨｜▾ ⚡｜▾ |

◄ ►                           **MAIN**

| Company | (…) [ **5** ▾] | CHANGE REQUEST RECAP | | |
|---|---|---|---|---|
| Project* | [ **6** ▾] | | COSTS | DAYS |
| Commitment* | [ **7** ▾] | Original Value | $0.00 | 0 |
| Description | [ **8** ] | Approved Changes | $0.00 | 0 |
| Record #* | [ **9** ] | Revised Value | $0.00 | 0 |
| Status / Revision | [Draft ▾] [ 0] | This Request | $0.00 | 0 |
| Category | [ **10** ▾] | USER DEFINED FIELDS | | |
| Post As | [Revised Scope **11** ▾] | Scope of Work (…) [ **12** ] | | |
| Commitment CO | [ ▾] | | | |
| | | Justification of Expense (…) [ **13** ] | | |

**5-** **Company field** – Your Company will auto select based on your user id.
**6-** **Project field** - Select the project from the Project drop down menu.
**7-** **Commitment field** - On the Commitment drop down menu, select the contract for your company.
**8-** **Description field** - Enter a summary of the proposed change.
**9-** **Record # field** – Enter an appropriate reference that serves as a tracking number, i.e. PCCEA 3, PCO 6, PDCA 2.
**10-** **Category field** – From the drop-down menu, select the appropriate category for the request.
**11-** **Post As field** – Leave as 'Revised Scope'.
**12-** **Scope of Work field** – Enter scope of the work to be performed in this change.
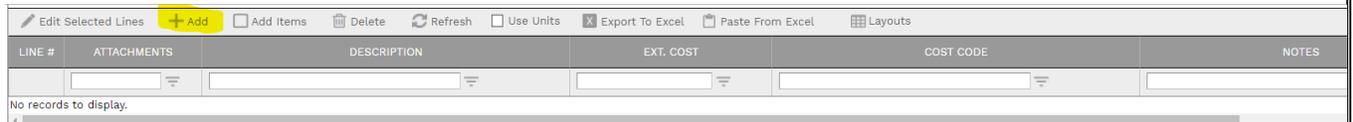**13-** **Justification of Expense field** – Enter sufficiently detailed information to clearly justify the request.
**14-** From the top bar, click on the **Save** icon.

**15-** A new tab at the bottom will appear.

**16-** To add funding lines, click on the '+ Add'

**17-** Select 'Layouts' and ensure Default layout is selected

| ✏ Edit Selected Lines | ➕ Add | ☐ Add Items | 🗑 Delete | ⟳ Refresh | ☐ Use Units | ☒ Export To Excel | 📋 Paste From Excel | ▦ Layouts |
|---|---|---|---|---|---|---|---|---|
| LINE # | ATTACHMENTS | | DESCRIPTION | | EXT. COST | | COST CODE | NOTES |
| | | | | | | | | |

No records to display.

**18-** In the 'DESCRIPTION' column, add a brief description

**19-** Enter the extended costs in the EXT. COST column.

**20-** Enter the cost code in the COST CODE column.  You can start typing the cost code name or number to narrow the search.

**21-** Enter Notes in the NOTES column.
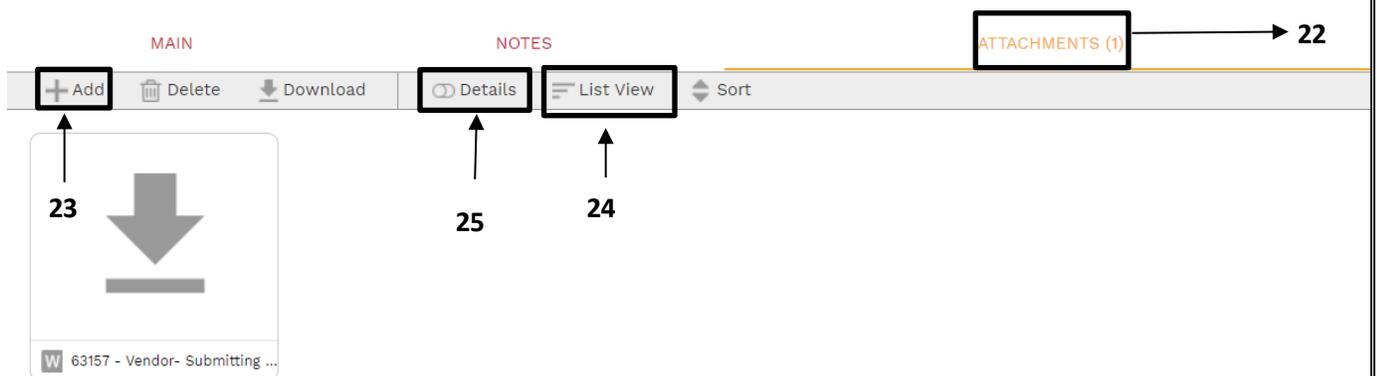
**22-** Repeat the process to add for other Cost Codes**.**

**23-** From the top bar, click on the **Save** icon in the top header.
**24-** Select the **Attachments** tab to add attachments**.**
**25-** Add files by drag/dropping or clicking the Add button.
**26-** Click on **List View** to show attachment details
**27-** Click on **Details** to show the details for attachments.

MAIN          NOTES          ATTACHMENTS (1)        → **22**

➕ Add    🗑 Delete    ⬇ Download    ⊙ Details    ☰ List View    ⇅ Sort

**23**          **25**          **24**

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Drop files here or click the A

4

26- Review attachment details.  Click on the **'Edit'** icon to make edits
27- In the **description field**, provide a brief description of the attachment.
28- Attach worksheets as a pdf or as an .xls file.
29- Repeat the process for additional back up files.
30- Click the **Save Icon.**

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Description*            Vendor- Submitting Online Change
                        Request NLM Review
                                                                    27
Linked Line

Notes

Geolocation

Version                 1

Added From              Upload

Added                   01-02-2023

Added By                Vendor - Vendor

ADD COMMENT

31- Review the data in the Change Request Recap data for accuracy.  For PAEAs and PCCEAs you should see no change since they are net zero to the contract.

CHANGE REQUEST RECAP

|                    | COSTS          | DAYS |
|--------------------|----------------|------|
| Original Value     | $1,140,000.00  | 0    |
| Approved Changes   | $0.00          | 0    |
| Revised Value      | $1,140,000.00  | 0    |
| This Request       | $0.00          | 0    |

**32-** If you identify data errors, select rows with errors and click on the '**Delete**' button. Review data in worksheet then reimport.

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
Drag a column header and drop it here to group by that column **32**

Edit Selected Lines  + Add  ☐ Add Items  🗑 Delete  ⟳ Refresh  ☑ Use Units  X Export To Excel  📋 Paste From Excel  ⊞ Layouts

| LINE # | ATTACHMENTS | DESCRIPTION | QUANTITY | UNIT COST | EXT. COST | COST CODE | COMMITMENT CHANGE ID | NOT |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | | |
| 1 | (0) | | 1.00 | $0.00 | $0.00 | | | |

**33-** Once data is validated, select the **Workflow** tab.

**34-** Click on the **Submit** button. Review information then click on the **Save** button.

◀ ▶     MAIN          NOTES          ATTACHMENTS          WORKFLOW

ACTIONS ——————————————                                    **33**

➤ SUBMIT  ➡ **34**

— BUSINESS PROCESS

— WORKFLOW LOG

**35- Process Complete.**

# Actions for Returned Online Change Request

1- Select the **Workflow** tab at the top navigation bar.
2- Scroll down to the *Workflow Log* section and review comments in the *Comments* column.
3- Select the '**Attachments'** tab to review any attachments from the Reviewer.

| | USER | ACTION DATE | ACTION TIME | ACTION | DELEGATE | TEAM INPUT | DOCUMENT VALUE | SIGNATURE | COMMENTS |
|---|---|---|---|---|---|---|---|---|---|
| | Daniel Rueda(dru | 12-08-2021 | 10:39:50 PM | Submit | | | | | ASI 05, 06, 07 & 09 addressed the location and elevation of the mechanical yard. Revisions to the structural drawings for the mechanical yard were apart of the package. Revisions to the mechanical yard wall panels. |

4- If the decision is made to withdraw the request. Under the '**Workflow'** tab, in the Actions box select **'Withdraw'** then click on the **Save** button.
5- If the decision is to resubmit - make corrections to data and other fields and update attachments as necessary.
6- Under the 'Workflow' tab, in the Actions box select 'Resubmit' then click on the Save button.

ACTIONS

- ( ) RESUBMIT → 6
- ( ) RETURN
- ( ) REJECT
- ( ) WITHDRAW → 4
- ( ) FINAL APPROVE
- ( ) DELEGATE
- ( ) COMMENT

[ SAVE ]