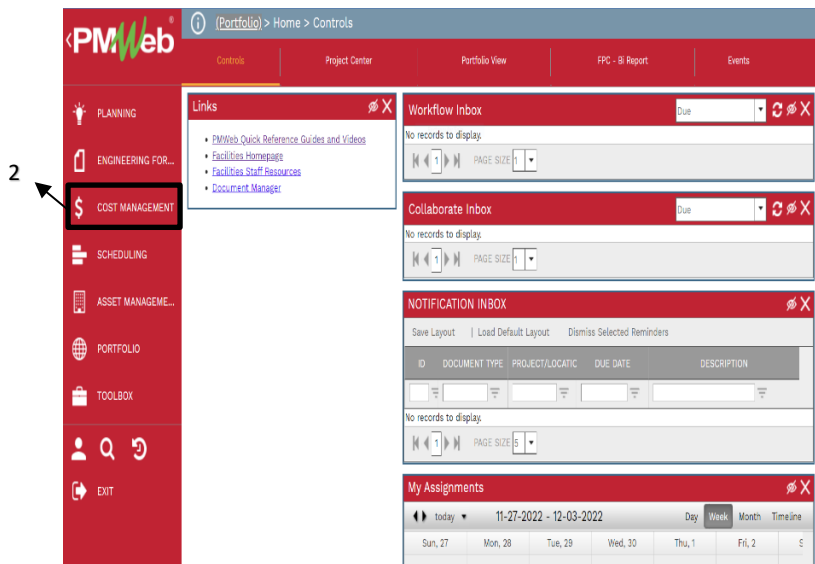UNIVERSITY of
HOUSTON
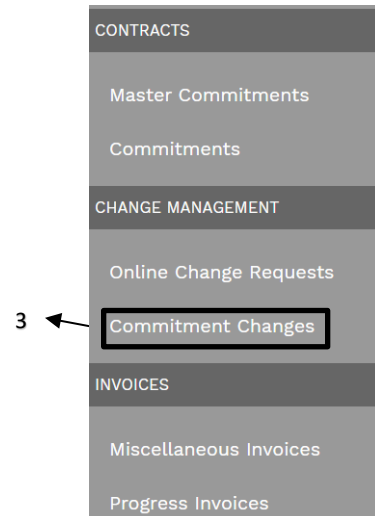FACILITIES SERVICES

PM

Commitment Changes

Submitting Commitment Changes.

1- Prior to submitting Commitment Changes, any vendor proposed Online Change Requests to be included must be validated and marked 'To UH Management Review'.
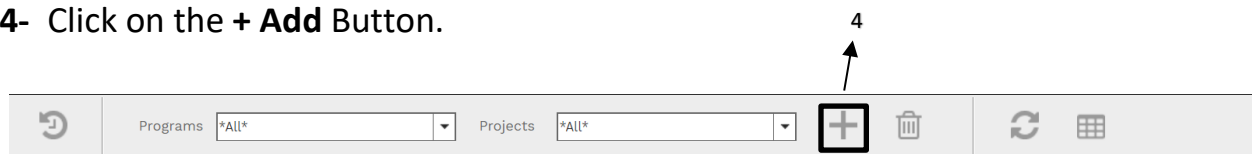
2- Click on **Cost Management**

3- Click on **Commitment Changes** under Change Management

4- Click on the **+ Add** Button.

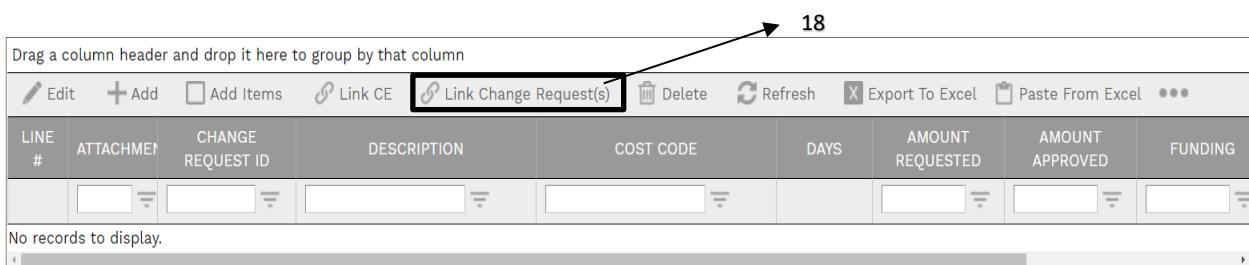| Project*	5		Reason Code	13	
Commitment*	6		Date of Issuance	14	
Company	7		Effective Date	15	
Record #*	8		Days	16	0
Description	9				
Post As	Revised Scope 10		RECAP		
Status / Revision	Draft	0		COSTS	DAYS
Change Request	11		Original Commitment A...	$0.00	0
Category	12		Prior Approved Changes	$0.00	0
			Prior Revised Contract	$0.00	0
			Total of This Change	$0.00	0
			Contract to This Change	$0.00	0

USER DEFINED FIELDS

K Number

5- **Project field** – Select the project from the drop down.
6- **Commitment field** – On the Commitment drop down menu, select the contract for the company.
7- **Company field** – Auto Populates from Commitment
8- **Record # field** – Enter the type and sequential number of changes – i.e. CO1, GMP2, CCEA4.

9- **Description field** – Enter a summary of the OCRs to be included within the scope to help with tracking, i.e. Includes PCO5, PC07 and PCO8.
10- **Post As field**- Leave as 'Revised Scope'
11- **Change Request field**- Leave Blank
12- **Category field**- From the drop-down menu, select the appropriate Category for the request.
13- **Reason Code field**- From the drop-down menu, select the appropriate Reason Code.
14- **Date of Issuance**- Leave blank
15- **Effective Date field**- Leave blank.
16- **Days field**- This header field populates as data rows are added.

17- From the top bar, click on the **Save** icon.

17

18- If pulling data from contractor submitted Online Change Requests, click on **Link Change Request(s)** on the lower bar.

18

Drag a column header and drop it here to group by that column

Edit   + Add   ☐ Add Items   🔗 Link CE   🔗 Link Change Request(s)   🗑 Delete   ⟳ Refresh   X Export To Excel   📋 Paste From Excel   •••

LINE #	ATTACHMEN	CHANGE REQUEST ID	DESCRIPTION	COST CODE	DAYS	AMOUNT REQUESTED	AMOUNT APPROVED	FUNDING

No records to display.

19- From the pop-up menu select the desired **Online Change Requests**.

Cost Codes are required! Lines without cost codes cannot be selected to link.

Not an error message.
Standard cost code

Drag a column header and drop it here to group by that column

SELEC	STATUS	OCR #	DESCRIPTION	REQUESTED DATE	NEEDED BY	REASON
☑	Approved	PCO37	Adding a PCO to test 7.3	12-16-2022		

20

20- Click on the save button to add data to the Commitment Change.

21- Review added data.

22- To edit data, select the appropriate line (Use shift to select multiple lines) then click on **Edit** on the lower bar

LINE #	ATTACHMEN	CHANGE REQUEST ID	DESCRIPTION	COST CODE	DAYS	AMOUNT REQUESTED	AMOUNT APPROVED	FUNDING
1	(0)	PCO8 - PCO8 Desc	PCO8 Scope of Work	03-00-000000 - Construction Cc	4.00	$17,888.00	$17,888.00	$0.00 ⋯
2	(0)	PCCO20 - Testing_	Adding 5 new windows	03-00-000000 - Construction Cc	0.00	$7,525.00	$7,525.00	$0.00 ⋯

22

23- To add additional lines for data not pulled from Online Change Requests, click on **+Add** on the lower bar.

Drag a column header and drop it here to group by that column

🖉 Edit   ＋ Add   ☐ Add Items   🔗 Link CE   🔗 Link Change Request(s)   🗑 Delete   🔄 Refresh   Ⓧ Export To Excel   📋 Paste From Excel   •••

23

24- Enter a description under the **Description** column.
25- Enter the cost code **Cost Code** column.
26- Enter **Amount Requested; Amount Approved** will auto populate
27- Click **Update Records** in grey bar
28- After all lines have been entered, use the *Funding* column to assign funds from Project Cost Centers. For CCEAs/AEAs, use the same funding line that was assigned in the GMP

27

	DESCRIPTION	COST CODE	DAYS	AMOUNT REQUESTED	AMOUNT APPROVED	FUNDING	NOTES
Desc	PCO8 Scope of Work	03-00-000000 - Constructi ▼	4.00	$17,888.00	$17,888.00	$0.00	Includes 4 days
ting	Adding 5 new windows	03-00-000000 - Constructi ▼	0.00	$7,525.00	$7,525.00	$0.00	

24   25   26   28

29- In the **Recap** section, verify the 'Total of This Change' row data**.

RECAP

	COSTS	DAYS
Original Commitment A...	$16,105,000.00	455
Prior Approved Changes	$62,049.00	3
Prior Revised Contract	$16,167,049.00	458
Total of This Change	$15,366.00	3
Contract to This Change	$16,182,415.00	461

** AEAs and CCEAs must be net zero so COSTS must be '0' for AEAs/CCEAs.

30- Under the '**UH Fields'** tab on the top bar, select the tab for the appropriate Category of change.

31- Enter the **Scope** and **Justification** by double clicking the row and entering information in the Data column. Data for remaining rows will be entered by Contracts.

32- Under the **Signatories tab**, enter the Architect and Contractor information.

31

	MAIN	ADJUSTMENTS	UH FIELDS	NOTES	ATTACHMENTS	WORKFLOW	NOTIFICATIONS

Additional Services Requi

✎ Edit

Allowance Exp Authorizat

UH FIELD	DATA	NOTES
Scope		
Justification		

Change Order

31

Construction Contingency

Design Change Authorizat

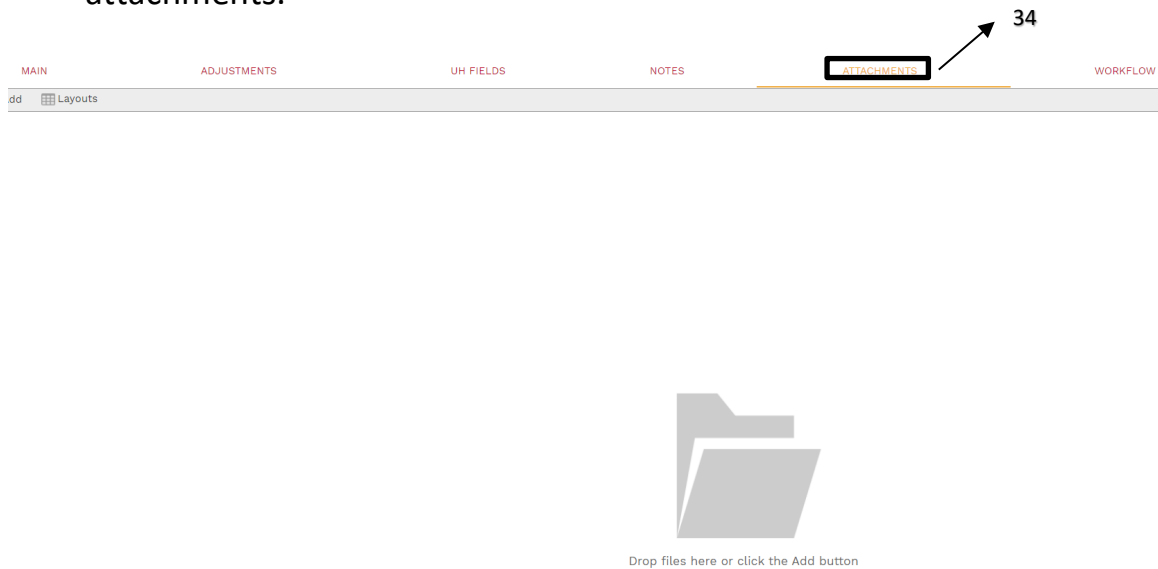Guaranteed Maximum Pri

Unilateral Change Order

32

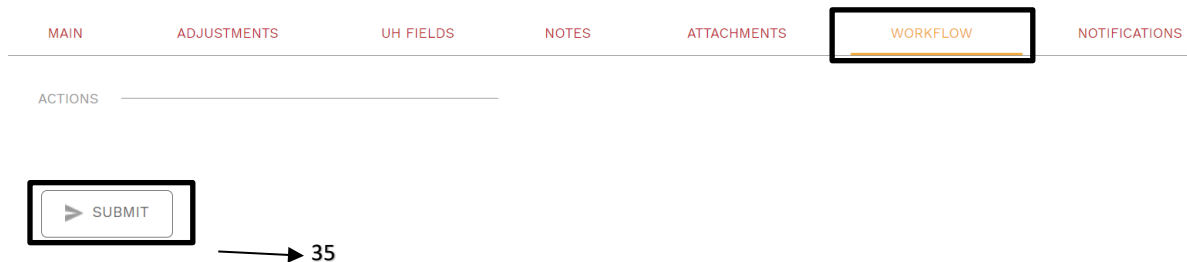Signatories

33- Click on the **Update Records** Button

33

💾 Update Record	⊗ Cancel		
UH FIELD	**DATA**		**NOTES**
Scope		⋯	⋯
Justification			

34- Under the '**Attachments'** tab on the top bar, add appropriate attachments.

34

| MAIN | ADJUSTMENTS | UH FIELDS | NOTES | ATTACHMENTS | WORKFLOW |

dd   Layouts

Drop files here or click the Add button

35- Under the **'Workflow'** tab on the top bar, click on **Submit** button.

| MAIN | ADJUSTMENTS | UH FIELDS | NOTES | ATTACHMENTS | WORKFLOW | NOTIFICATIONS |

ACTIONS

SUBMIT

35

36- If desired, type any comments in the **Comments** field**.**

36

Comments

SAVE

CANCEL   37

37- Click on the **Save** button in the Action box.

38- **The Project Manager may also need to complete a budget realignment to ensure adequate budget amounts in applicable cost codes.**