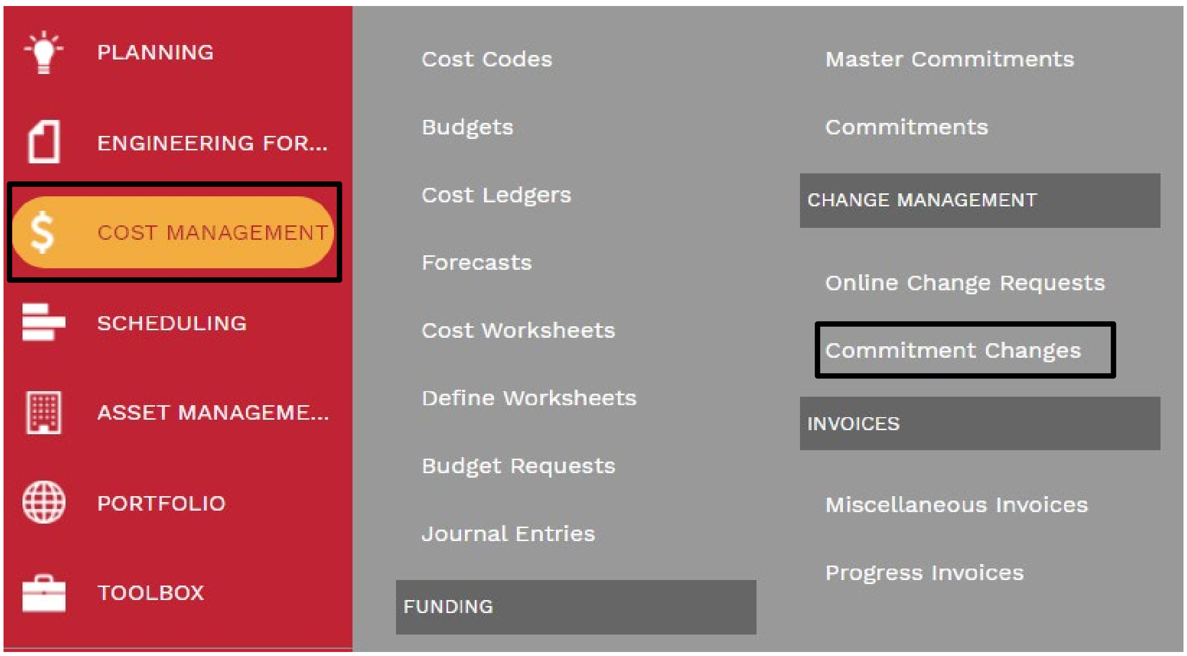
UNIVERSITY of HOUSTON
FACILITIES SERVICES

PM & Contracts

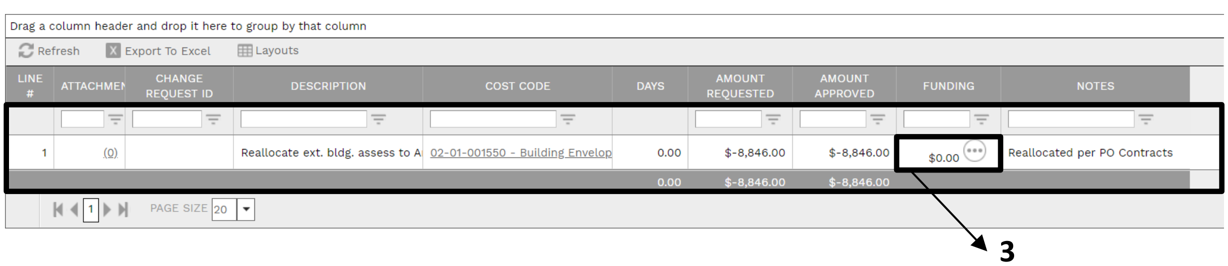
Commitment Change Processing

Contract Administrator

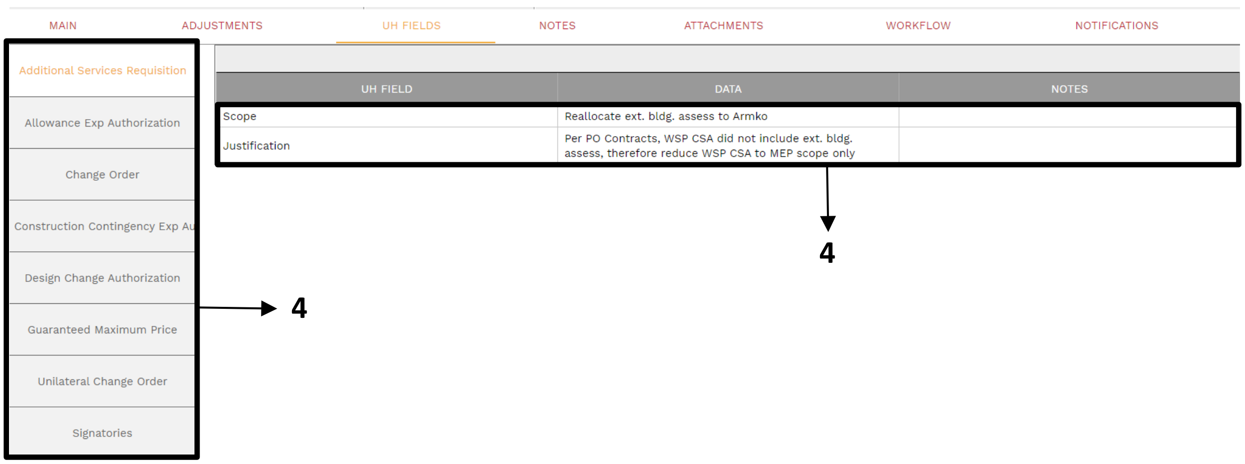
1. Access the Commitment Change record by clicking on the link in the notification e-mail, the item in your PMWeb WORKFLOW INBOX or going to **Commitment Changes** under **COST MANAGEMENT**.



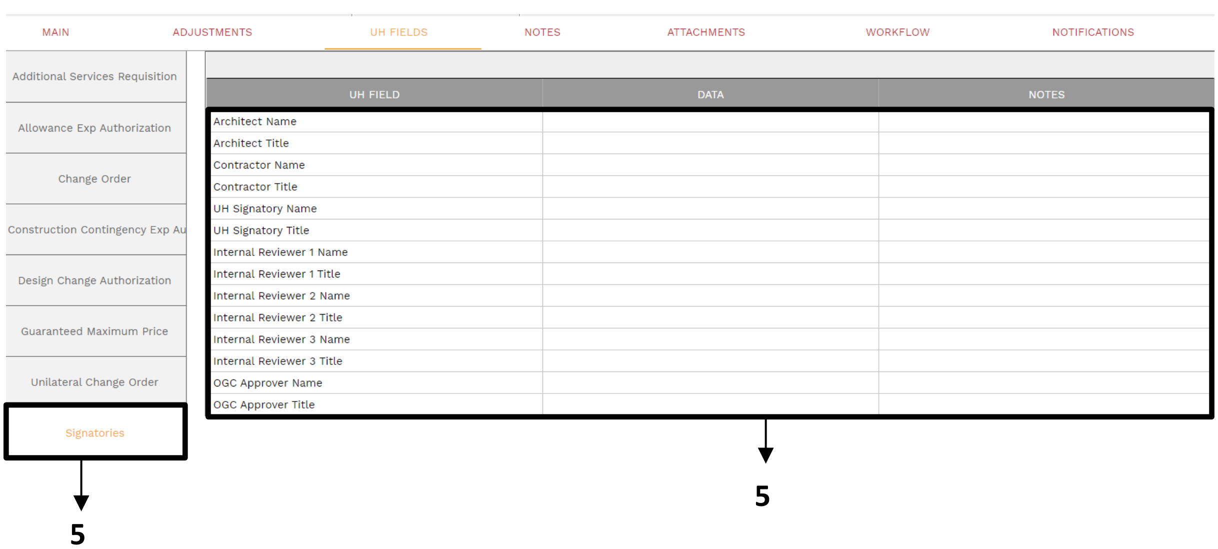
2. In the **Lower tab**, review the data entered.
3. Ensure that funds have been allocated under the 'Funding' column.



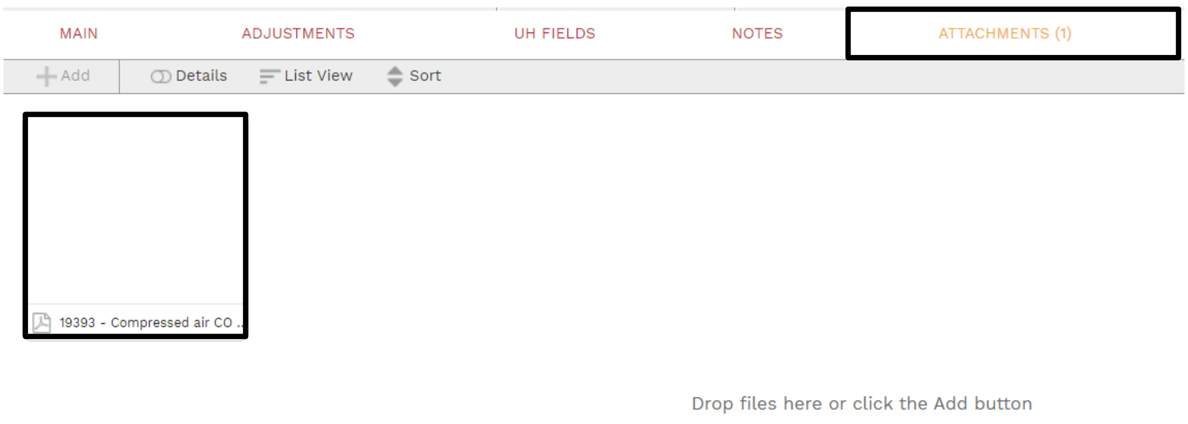
4. Under the ‘**UH Fields’** tab, select the appropriate change type tab. Review the Scope and Justification provided. Enter data for any additional fields required (ie. ‘Change Order Type’ field for Change Orders).



5. Under the ‘**UH Fields’** tab, select the ‘Signatories’ tab. Review the Architect and Contractor data. Enter additional names and titles as required based on the type and dollar value of the change.



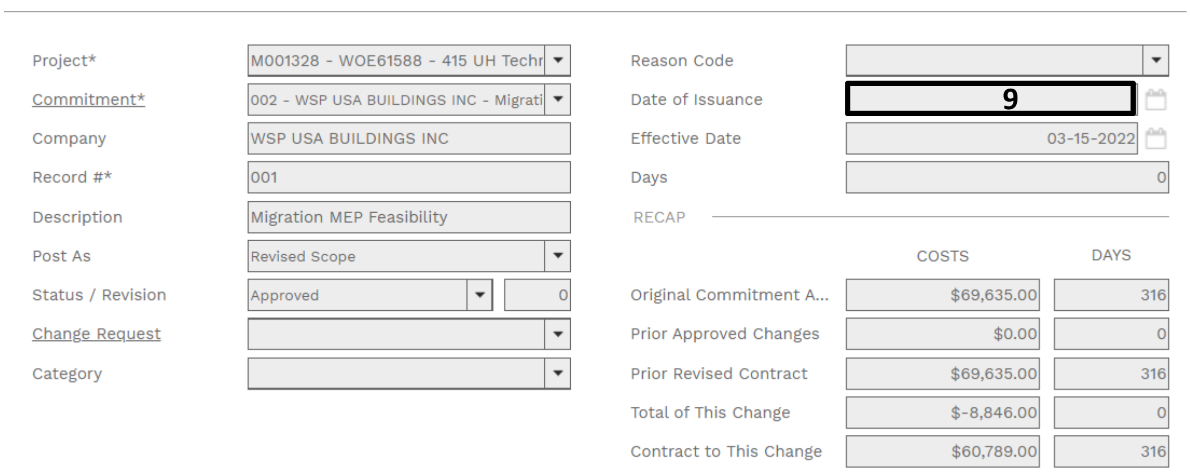
6. Select the '**Attachments**' tab. Review attachments submitted.



7. If the commitment change is ready for submission, continue, if not ready, skip to step 18.

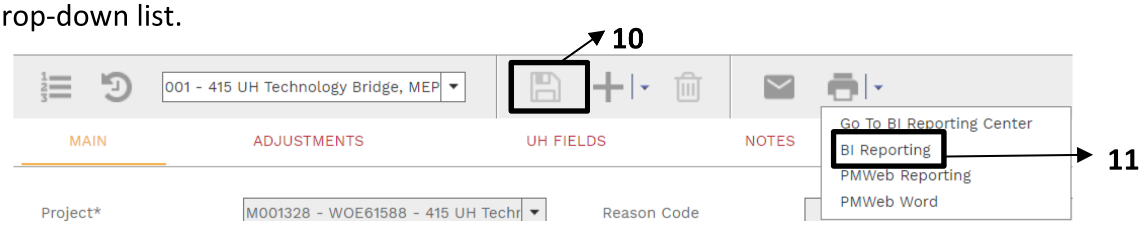
8. Click on the **Main tab** in the top navigation bar.

9. In the **Date of Issuance** field, enter the date the form was submitted by the submitter.



10. From the top bar, click on the icon to save the information entered.

11. On the top bar, click on the drop-down arrow for the Print icon and select BI Reporting from the drop-down list.

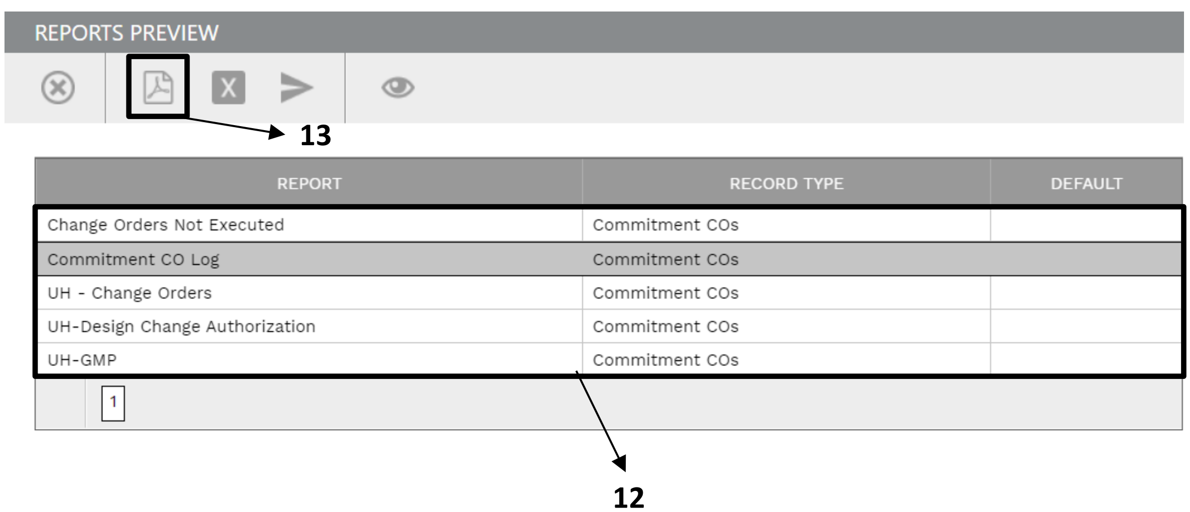


12. Double click the desired UH report to preview.

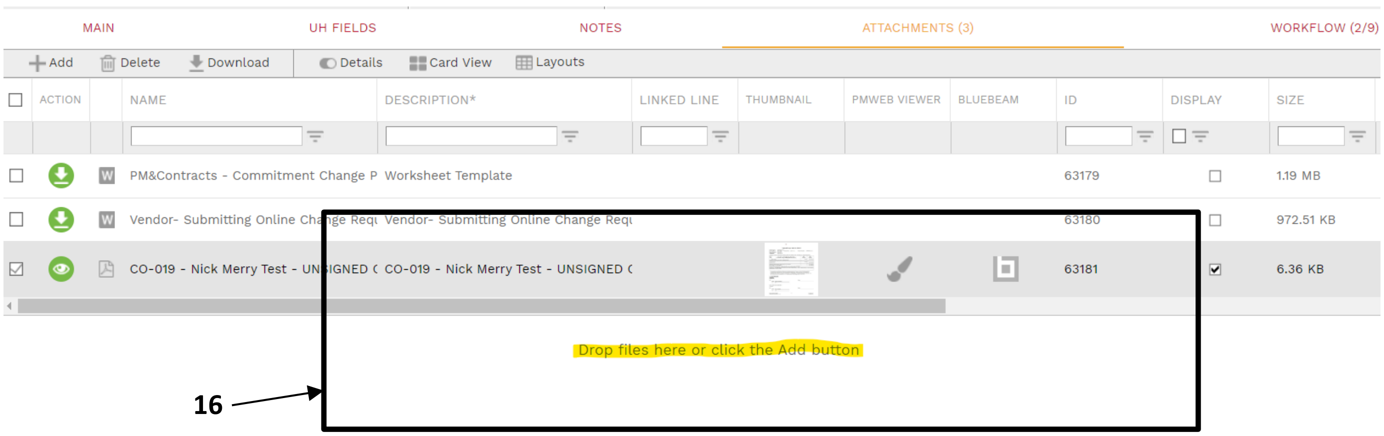
13. Click on Print Drawing to PDF button.

14. Review the form for accuracy.

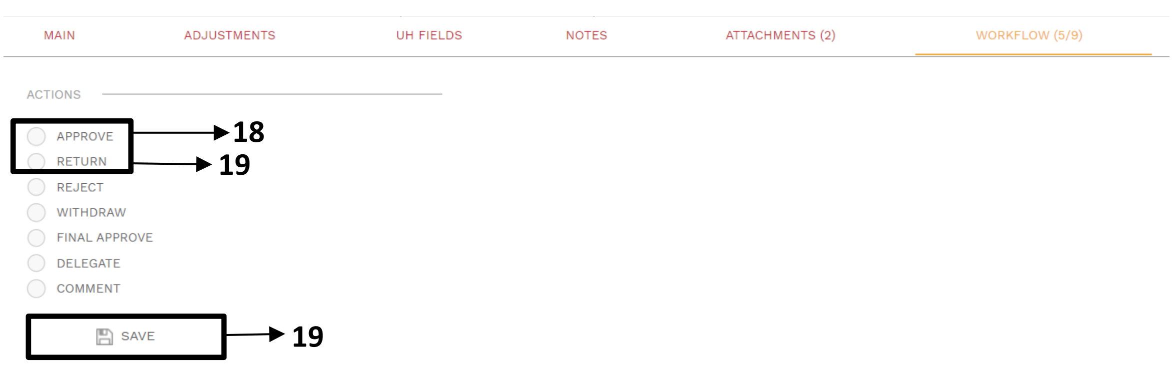
15. Save the file using following format for the file name - "[change number] - [project name] - UNSIGNED Changes Form".



16. Under the '**Attachments**' tab, add the created UNSIGNED Changes Form by dragging and dropping the file to the files list.



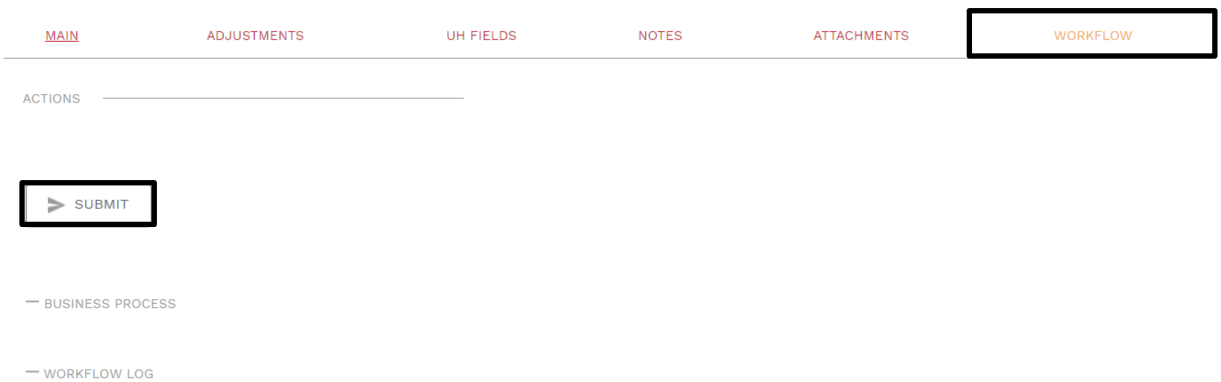
17. Under the "Workflow" tab click on the **Approve** button in the "Actions" box.
18. **OR**, if issues were identified that require resubmission, under the "Workflow" tab click on the **Return** button in the "Actions" box.
19. Click the **Save** button.



20. [If required] The workflow will continue to OGC review if required
21. The change is routed to the submitter to get vendor 'wet' signatures.

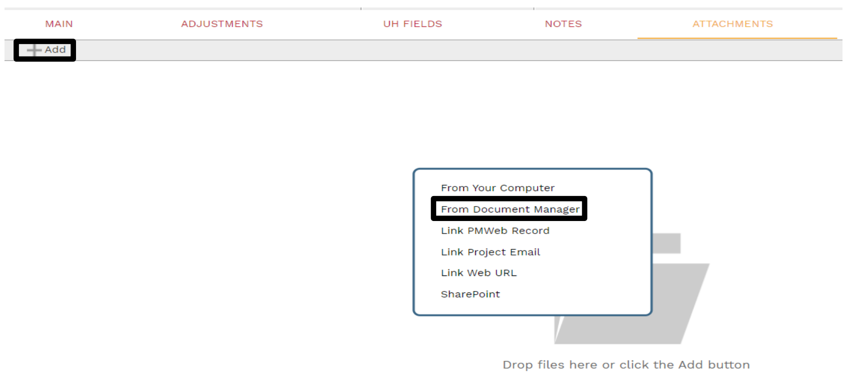
Project Manager

22. Go to the Attachments tab and download the UNSIGNED Changes Form.
23. Print out and circulate the form to get ‘wet’ signatures from vendors.
24. Once form is signed, save the file as “[change number] - [project name] – VENDOR SIGNED Changes Form”.
25. Add the VENDOR SIGNED Form to the Attachments tab.
26. Under the ‘**Workflow’** tab click on the **Submit** button.

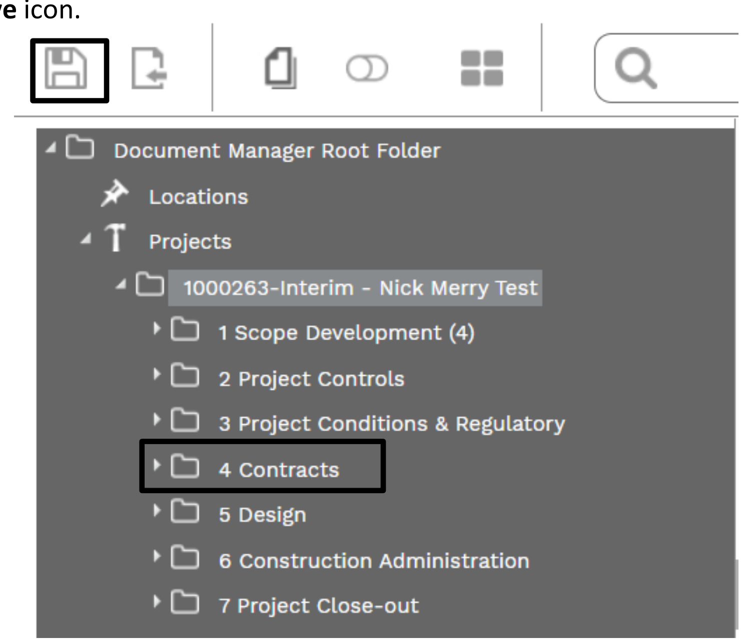


Contracts Coordinator

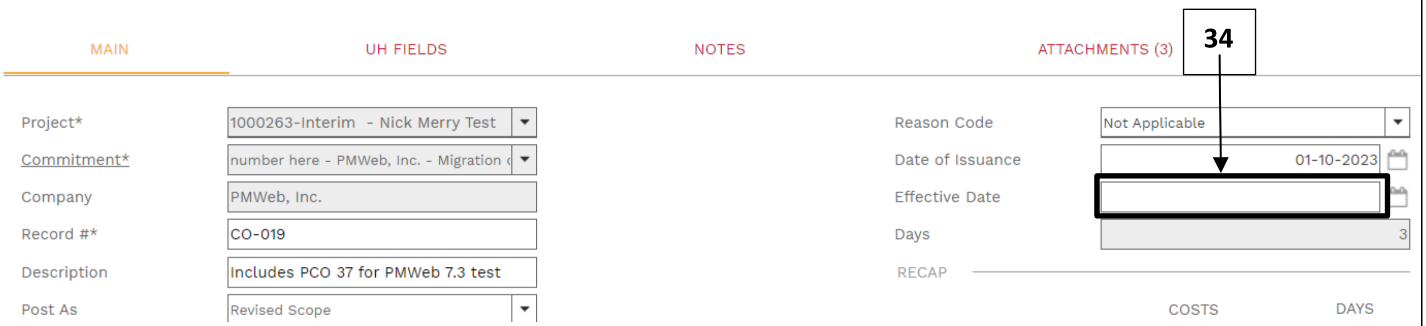
27. Go to the Attachments tab and download the VENDOR SIGNED Changes Form.
28. Print the Form then route through Adobe Sign for signature.
29. Once form is signed, save the file as "[change number] - [project name] – EXECUTED Changes Form".
30. Under the '**Attachments**' tab, click on the **+Add** button and select the Document Manager.



31. Select the attached file and in the Notes column add 'executed form'.
32. Utilize Document Manager to attach the EXECUTED Changes Form in the appropriate Contracts folder.
33. Click on the **Save** icon.

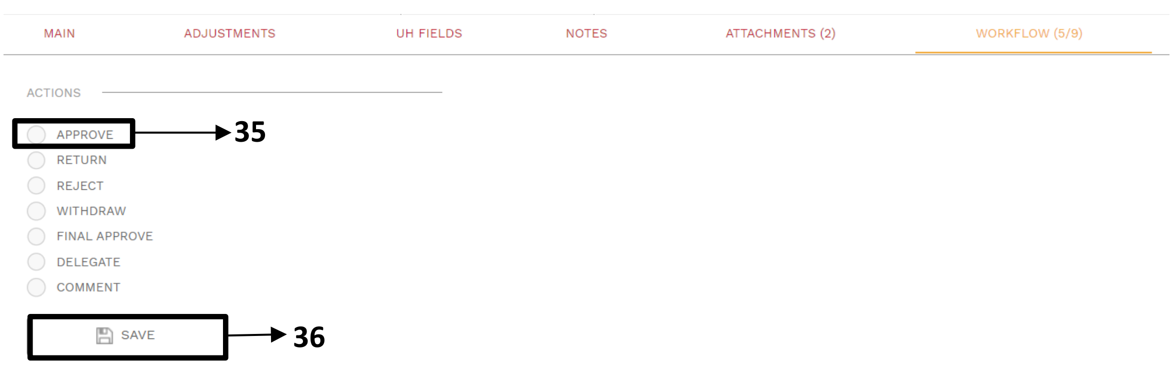


34. Under the MAIN tab, enter the date signed by the binding signatory in the Effective Date field.



35. Under the "Workflow" tab at the bottom, click on the **Approve** button in the "Actions" box.

36. Click the **Save** button.



37. The form then proceeds to Business Services to enter change data into Peoplesoft.

38. Once the Commitment Change is signed by authorized signer, PM will return to Online Change Requests.

39. PM attaches a copy of signed changes form to all included Online Change Requests.

40. In workflow, Final Complete all included Online Change Requests.

The Project Manager may also need to complete a budget realignment using a Budget Request record to ensure adequate funding in applicable cost codes.