

PM Submitting Commitment Changes

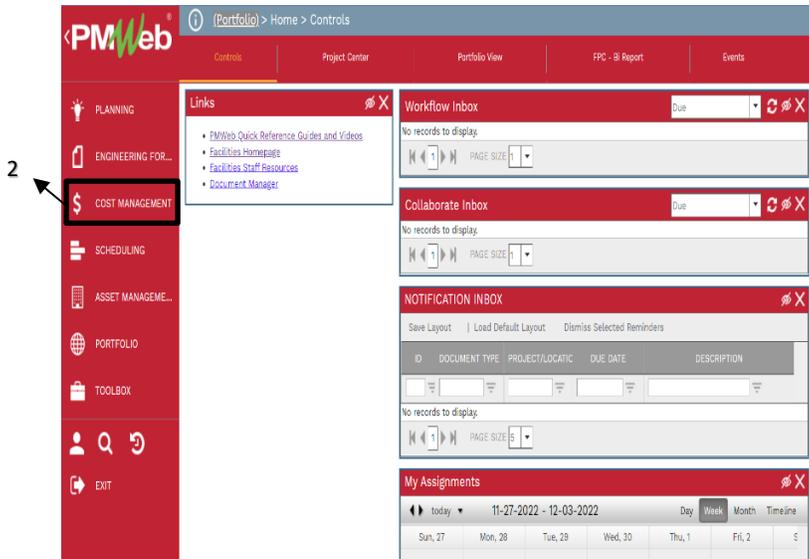
Overview: **Vendors** submit Online Change Request records in response to an owner requested change or if they feel there is an increase in cost or time that warrants a change. The Commitment Changes record is the tool for PMs to submit Online Change Requests they have reviewed for additional review and final approval.

References:

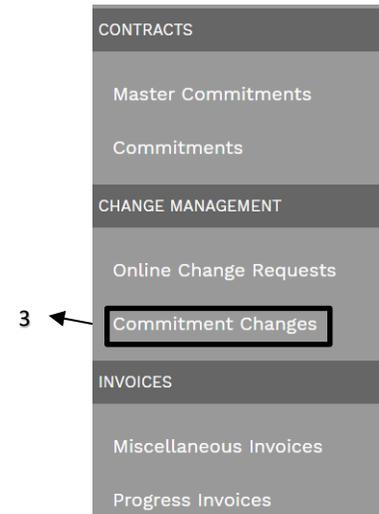
- **FPC Contracts Changes Guide**
- **PM Web Guide for Online Change Requests**

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
Description	9	RECAP	
Post As	Revised Scope 10	COSTS DAYS	
Status / Revision	Draft 0	Original Commitment A...	\$0.00 0
Change Request	11	Prior Approved Changes	\$0.00 0
Category	12	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	

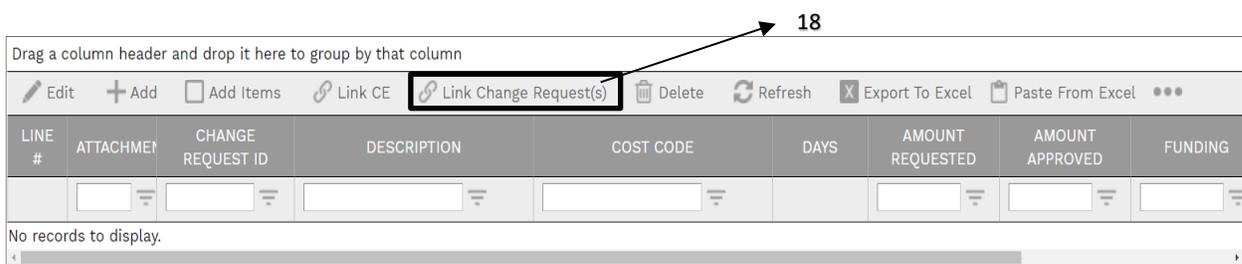
- 5- Project field** – Select the project from the drop down.
- 6- Commitment field** – On the Commitment drop down menu, select the contract for the company.
- 7- Company field** – Auto Populates from Commitment
- 8- Record # field** – Enter the type and sequential number of changes – i.e. CO1, GMP2,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



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



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
<input checked="" type="checkbox"/>	Approved	PCO37	Adding a PCO to test 7.3	12-16-2022		

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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 C	4.00	\$17,888.00	\$17,888.00	\$0.00
2	(0)	PCCO20 - Testing	Adding 5 new windows	03-00-000000 - Construction C	0.00	\$7,525.00	\$7,525.00	\$0.00

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



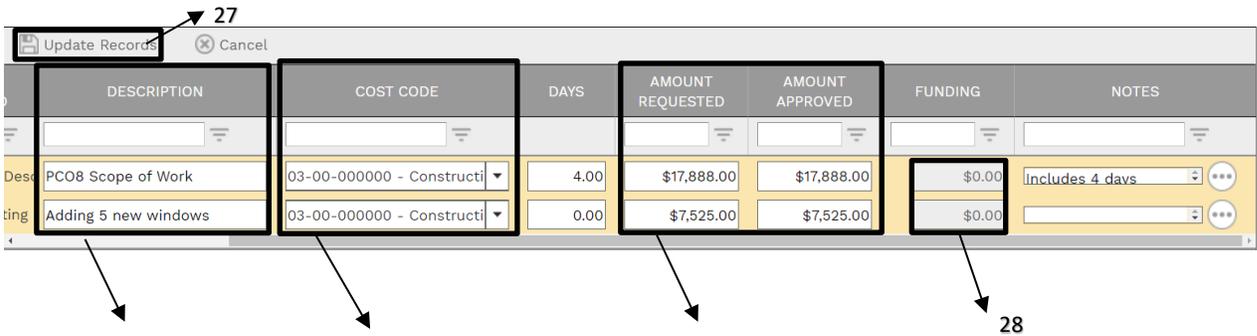
24- Enter a description under the **Description** column.

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



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

UH FIELD	DATA	NOTES
Scope		
Justification		

31

32

Signatories

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

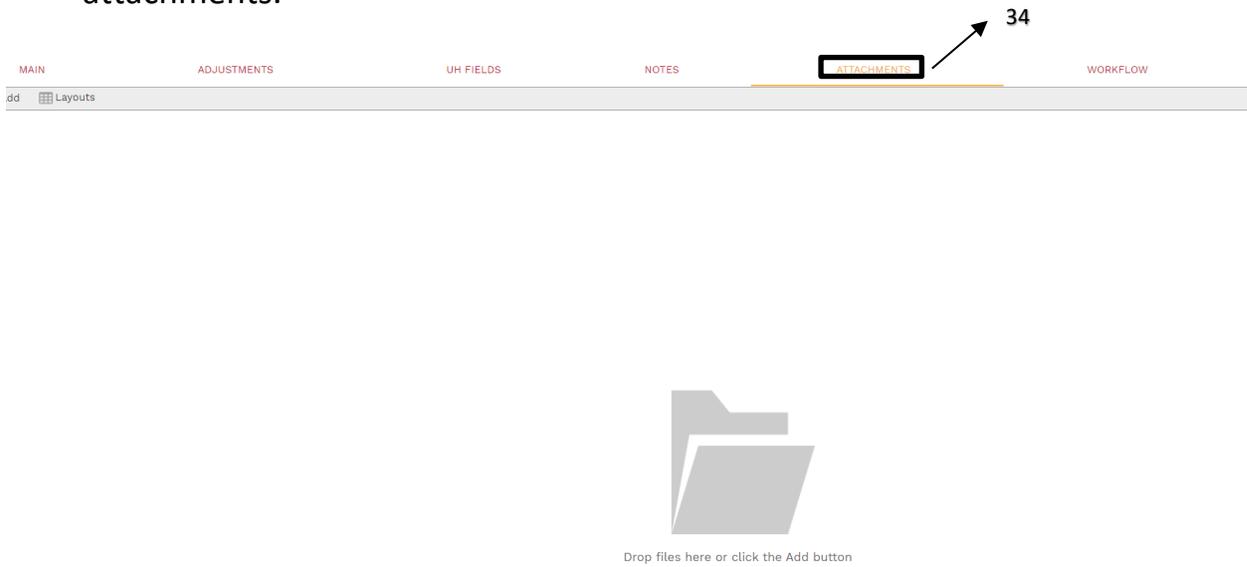
33

UH FIELD	DATA	NOTES
Scope	<input type="text"/>	<input type="text"/>
Justification		

Update Records

Cancel

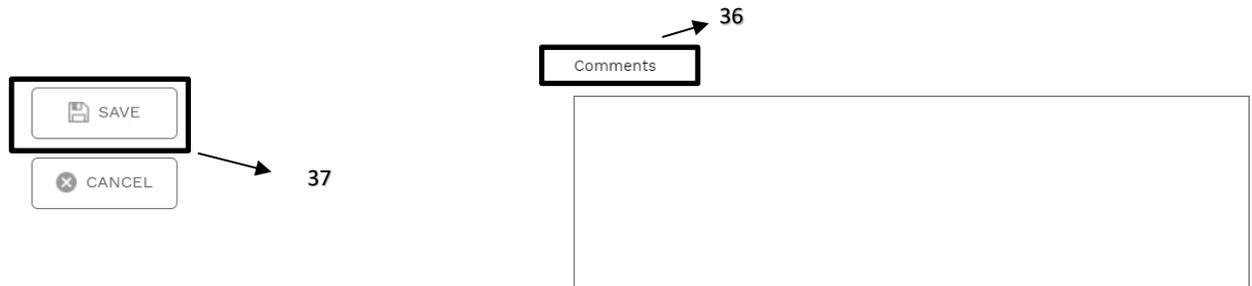
34- Under the **'Attachments'** tab on the top bar, add appropriate attachments.



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



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



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.