

Reviewing Online Change Requests (OCRs)

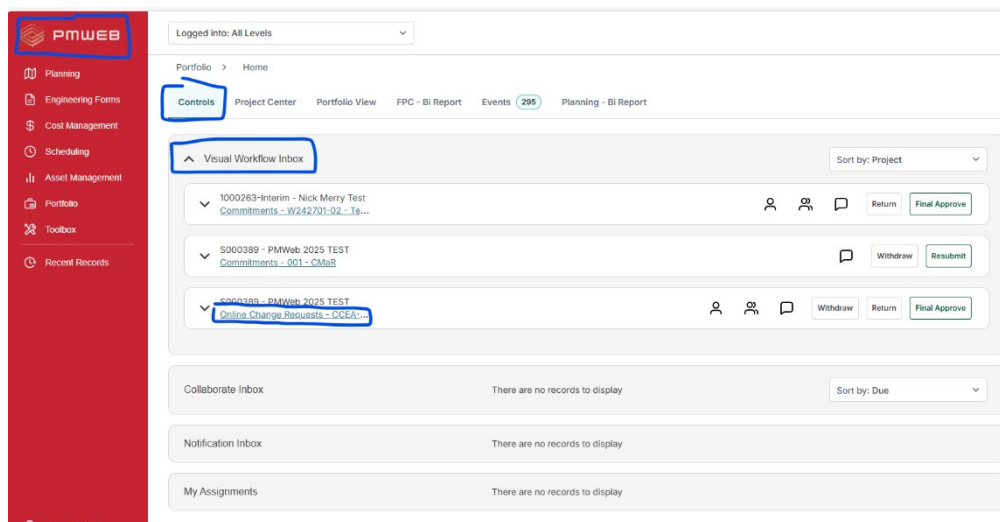
User – UH Project Manager

Task – Reviewing and Approving Online Change Requests for Management Review

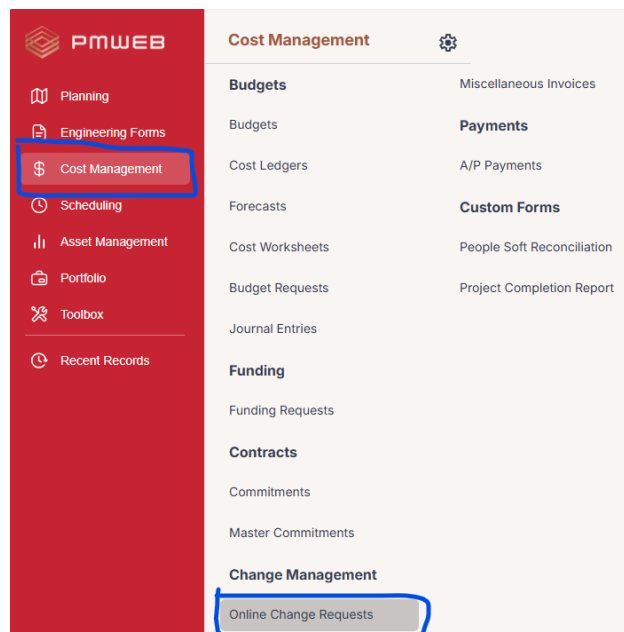
Purpose – For PMs to Review online change requests. The PM can Return requests for additional review/work, Reject requests, or accept those ready for higher review. This includes both those received directly from a construction contractor and those reviewed by A/Es. *If A/E is reviewing the OCRs in the workflow, they must review and move the record forward in the workflow first before UH PM review begins.*

Steps:

1. Navigate to the record for the request to be processed. This can occur multiple ways:
 - a. Select the link in the e-mail notice from PM Web.
 - b. Select the link from your PM Web WORKFLOW INBOX. Below is a snapshot for this option.



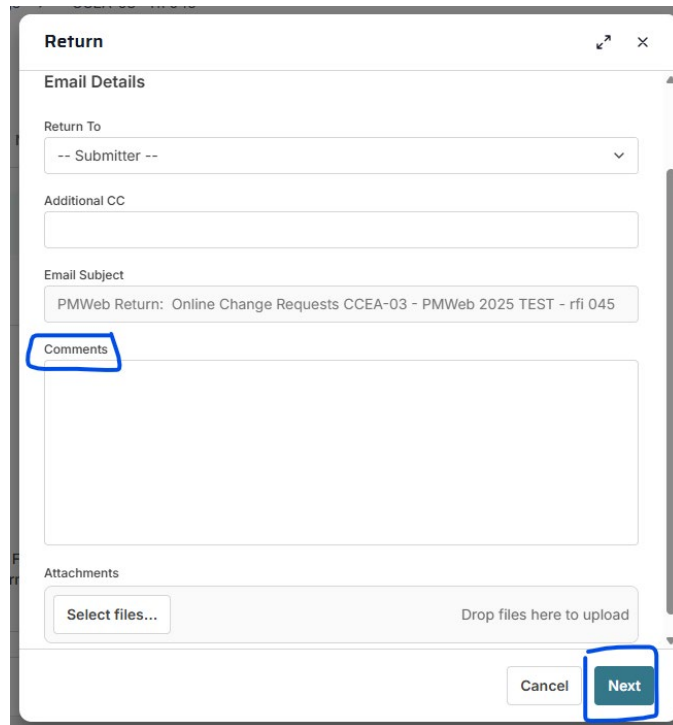
- c. Go to the Online Change Request module and select the desired Online Change Request. Below is a snapshot for this option.



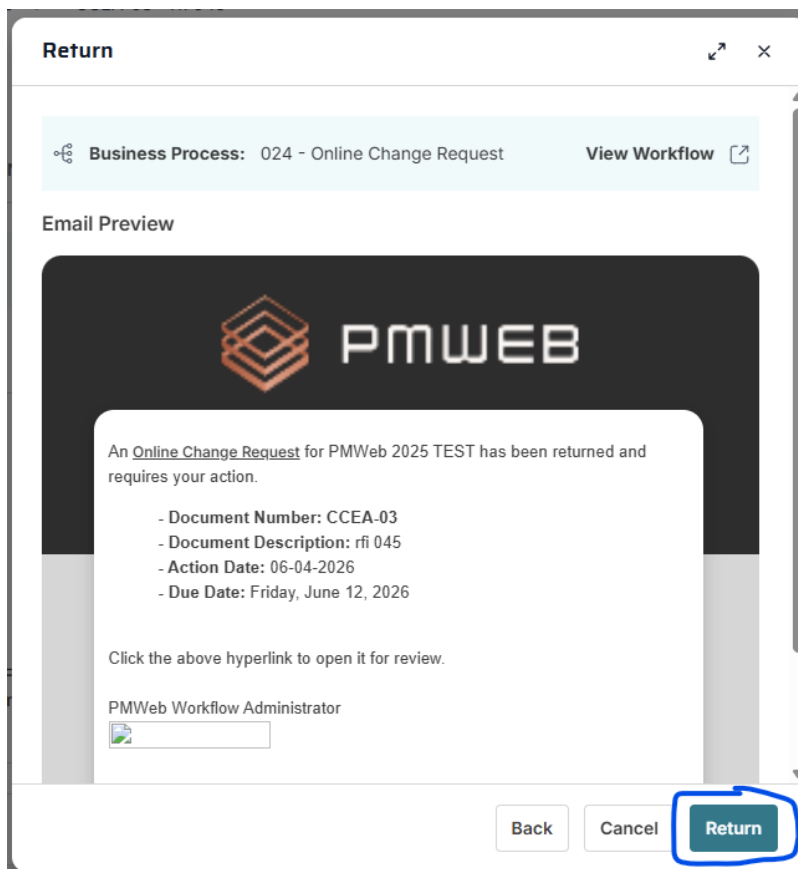
2. Review **Record #** and **Description** field to ensure fields have been filled out correctly.
3. Review the **Category** field to ensure the category is appropriate. This is especially important for construction contracts where many proposed change orders are in fact part of the scope of work. These proposed change orders may be eligible for use of construction contingency or allowances and if so should be selected accordingly under Category.
4. Review the **Scope of Work** and **Justification** fields to ensure submitter has filled out the text appropriately.
5. Select the '**Attachments**' tab. Review all attachments looking for proper use of templates and that proposed costs are fair and reasonable. If Days are requested, a critical path analysis must be attached.

6. Navigate to the '**Details**' section at the bottom of the page. Review the cost code values and ensure the amounts match those in the submitted attachments. For CCEAs and AEAs, ensure the values entered result in a net \$0 submission.
7. When review is complete, the PM has the option to **Return**, **Reject** or mark as **Reviewed** to continue workflow.
8. **If Returning or Rejecting**, comments should be provided in the workflow process and can be augmented with attachment(s).
9. Select the '**Attachments**' tab and attach any files desired.
10. Select the '**Workflow**' tab
11. In the Actions box select 'Return' or 'Reject' to return to the submitter then click on the **Save** box.
 - a. **Return** is designated for OCR submissions that need correction prior to approval
 - b. **Reject** is designated for OCR submissions that are not justifiable in any manner, regardless of whether it is an additive change order, CCEA or AEA.

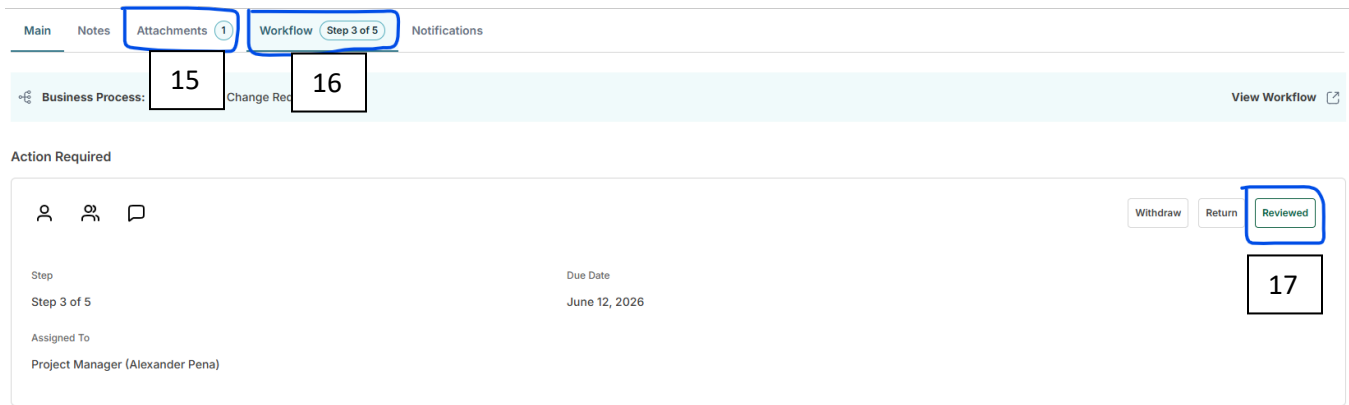
12. A pop-up box will appear. Enter any **comments** to describe reasons for **Return** or **Reject**. You can also attach files here. Then click the **Next** button.



13. Another pop-up box will appear. Click **Return** or **Reject** button as applicable. Once it has been **Returned** or **Rejected** it will go back to the Submitter to revise and resubmit as applicable.

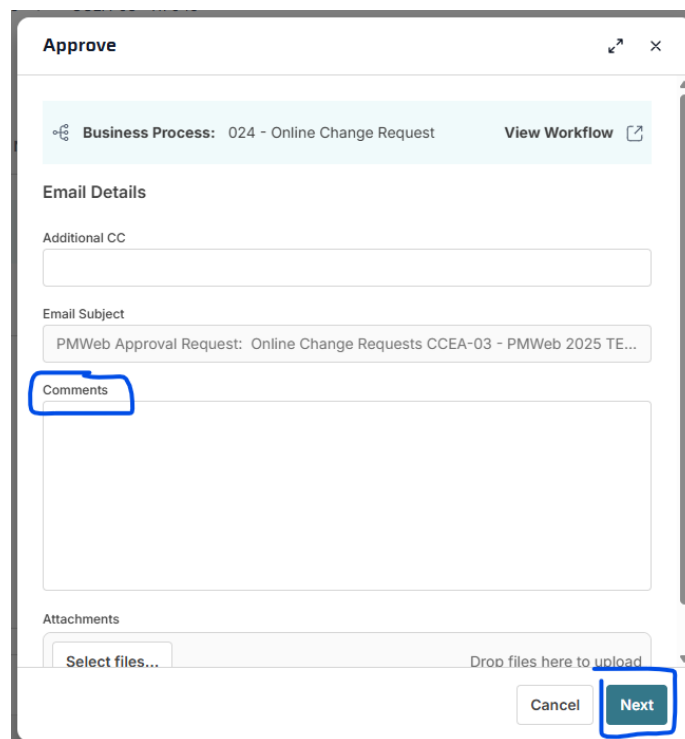


14. If selecting **Reviewed to continue workflow**, comments can be added in the workflow process and can be augmented with attachment(s).
15. Select the **Attachments** tab and attach any files desired.
16. Select the **Workflow** tab.
17. In the Action Required box select the **Reviewed** button.



The screenshot shows the PMWeb interface with the following elements:

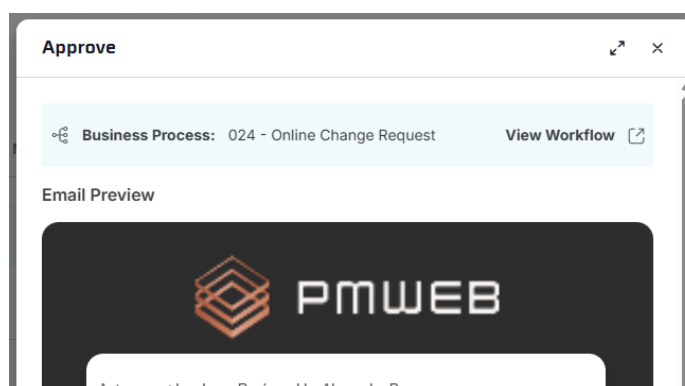
- Top Navigation:** Main, Notes, Attachments (1), Workflow (Step 3 of 5), Notifications.
- Business Process:** 024 - Online Change Request. A 'View Workflow' link is present.
- Action Required:**
 - Step: Step 3 of 5
 - Due Date: June 12, 2026
 - Assigned To: Project Manager (Alexander Pena)
 - Buttons: Withdraw, Return, **Reviewed** (highlighted).



The 'Approve' pop-up box contains the following fields and buttons:

- Business Process:** 024 - Online Change Request. A 'View Workflow' link is present.
- Email Details:**
 - Additional CC: [Text input field]
 - Email Subject: PMWeb Approval Request: Online Change Requests CCEA-03 - PMWeb 2025 TE...
 - Comments:** [Text input field, highlighted with a blue box]
- Attachments:** [Text input field]
- Buttons:** Cancel, **Next** (highlighted with a blue box).

19. Another pop-up box will appear. Click 'Approve'



The 'Approve' pop-up box shows the 'Email Preview' section with the PMWeb logo and the text 'PMWEB'.

20. After the PPM approves for 'To Higher Management Review, the Online Change Request is available to be linked to a Commitment Change. See training for 'Commitment Change' to continue the process.
21. At this time, the Workflow will be in '(Step 5 of 5)'. This will allow the submitter to view that the Online Change Request is ready for 'Higher Management Review'. Do not proceed with workflow until AFTER Higher Management reviews (through Commitment Change workflow) and approves.
22. After Higher Management reviews (Commitment Change is approved) navigate back to the OCR.
23. Click on **Attachments** tab and attach any files as necessary.
24. Click on **Workflow** Tab and click the **Final Approve** button.

The screenshot shows the PMWeb Workflow interface. At the top, there are tabs for 'Main', 'Notes', 'Attachments' (with a red box around it), 'Workflow' (with a red box around it and 'Step 5 of 5' indicated), and 'Notifications'. Below the tabs, a light blue header bar displays 'Business Process: 024 - Online Change Request' and a 'View Workflow' link. The main content area is titled 'Action Required' and contains a table with the following information:

Step	RAM
Step 5 of 5	Approved Record
Assigned To	Due Date
Project Manager (Alexander Pena)	June 12, 2026

On the right side of the 'Action Required' section, there are three buttons: 'Withdraw', 'Return', and 'Final Approve' (highlighted with a red box).

25. A pop-up box will appear. Add any comments or files if desired. Click 'Next'

The screenshot shows the 'Final Approve' pop-up box. It has a title bar with 'Final Approve' and a close button. Inside, there is a header bar with 'Business Process: 024 - Online Change Request' and a 'View Workflow' link. Below this, there is a section for 'Email Details' with fields for 'Additional CC' and 'Email Subject'. The 'Email Subject' field contains the text 'PMWeb Workflow was approved: Online Change Requests DocumentNumber - P...'. Below the email details, there is a 'Comments' field (highlighted with a red box) and an 'Attachments' section (highlighted with a red box) with a 'Select files...' button. At the bottom right, there are 'Cancel' and 'Next' buttons (the 'Next' button is highlighted with a red box).

26. Another pop-up box will appear. Click **Final Approve** button. Reminder, Final Approve is only used after the Commitment Change has been approved by the individual having signature authority.
27. **PROCESS COMPLETE.** Notify the submitter accordingly.

