

Vendor

Submitting Online Change Request

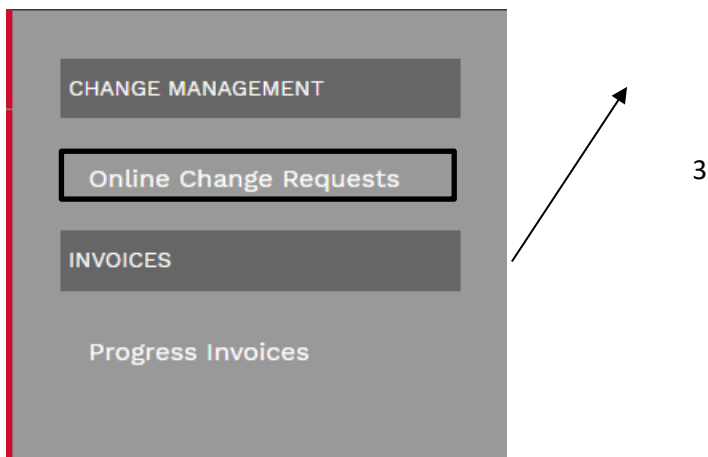
Overview: Vendors that believe that there has been a change that affects the contract price or time, can submit a request for change through PM Web using an Online Change Request record. Vendors must include suitable justification to justify the change in the attachment tab.

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. Attach 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

New Record

button.

Header Fields

Company Project* Commitment* Record #* Description

Currency* Submittal Type Category Post As Workflow Status

USD - Dollars (USA) Revised Scope Draft

Revision 0 Use Units

User Defined Fields

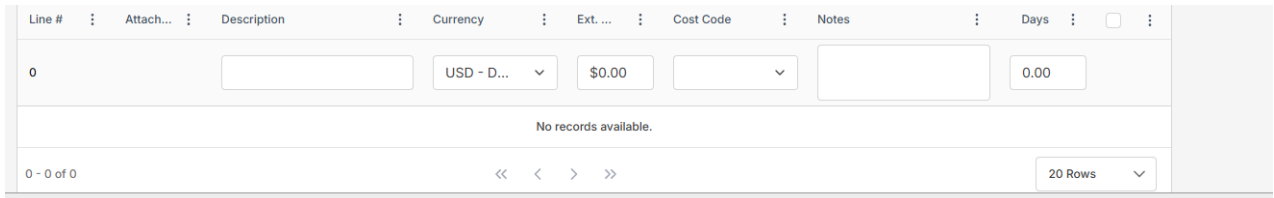
Scope of Work Justification

- 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- On the Right side, click on the **Save** icon.

15- A new tab at the bottom will appear.

16- To add funding lines, click on the 'New Line'

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



The screenshot shows a table with the following columns: Line #, Attach..., Description, Currency, Ext. ..., Cost Code, Notes, Days, and a checkbox. The first row has the value '0' in the 'Line #' column. The 'Currency' column shows 'USD - D...' with a dropdown arrow. The 'Ext. ...' column shows '\$0.00'. The 'Cost Code' column has a dropdown arrow. The 'Notes' column is empty. The 'Days' column shows '0.00'. Below the table, it says 'No records available.' and '0 - 0 of 0'. At the bottom right, there is a '20 Rows' dropdown menu.

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- 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**.

W 63157 - Vendor- Submitting Online Chang...



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Description*

Vendor- Submitting Online Change Request NLM Review

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Linked Line

Notes

Geolocation

Version 1

Added From Upload

Added 01-02-2023

Added By Vendor - Vendor

ADD COMMENT

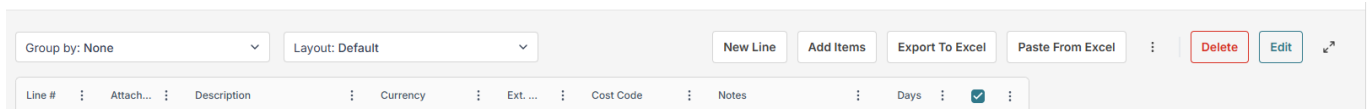
- 31- Review the data in the Change Request Recap data for accuracy. For PAEAs and PCCEAs you should see no change since they are net zero to the contract.

Recap



Calculation	Value	Days	% of Max	Visualization
Original Value	\$1,000,000.00	0	50%	
Approved Changes	\$1,000,000.00	0	50%	
Revised Value	\$2,000,000.00	0	100%	
This Request	\$0.00	0	0%	

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



The screenshot shows a software interface with a table header and a row of action buttons. The table header includes columns: Line #, Attach..., Description, Currency, Ext. ..., Cost Code, Notes, Days, and a checkbox. The action buttons are: New Line, Add Items, Export To Excel, Paste From Excel, a vertical ellipsis, Delete (highlighted in red), Edit, and a small icon.

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



The screenshot shows a row of action buttons: New Record, Print (with a dropdown arrow), Recap, a vertical ellipsis, a vertical line, and Submit (highlighted in blue).

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.

The screenshot shows the top navigation bar with tabs: MAIN, NOTES, ATTACHMENTS, WORKFLOW, and NOTIFICATIONS. An arrow labeled '1' points to the WORKFLOW tab. Below the navigation bar is the 'WORKFLOW LOG' section. It includes a header with a dropdown menu and buttons for 'Resend Message(s)', 'Refresh', and 'Layouts'. An arrow labeled '3' points to the 'Attachments' tab. Below the header is a table with columns: USER, ACTION DATE, ACTION TIME, ACTION, DELEGATE, TEAM INPUT, DOCUMENT VALUE, SIGNATURE, and COMMENTS. An arrow labeled '2' points to the COMMENTS column. The first row of data shows a user 'Daniel Rueda(dru...)' with an action date of '12-08-2021' and an action time of '10:39:50 PM', with the action 'Submit'.

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 & 08 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