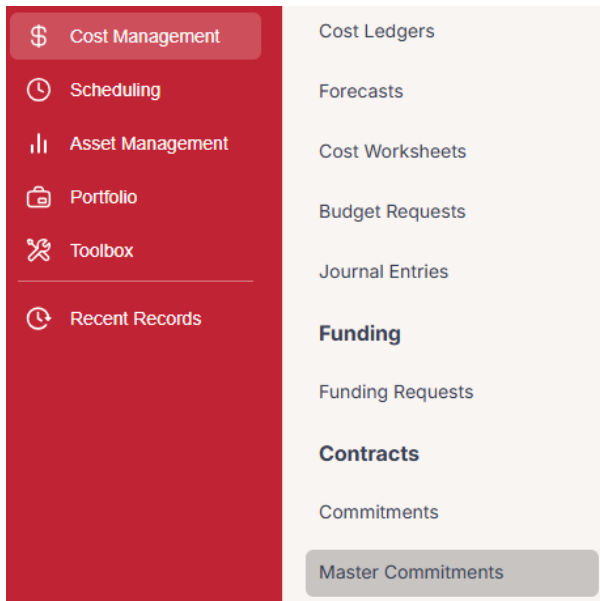


Establishing CSAs as Master Commitments

Overview: This process is for entering a Continuing Service Agreement (CSA) into PM Web. The Master Commitment record is used to manage the CSA and the Commitment record is used to write Project Agreements against the CSA.

Reference: n/a

1- Under Cost Management, select Master Commitments.



- 2- Click on **New Record** on the top right to add a new Master Commitment.
- 3- **Contract No.** field –Enter contract number.
- 4- **Description** field - Enter a brief descriptive explanation of the contract scope.
- 5- **Company** field - Select from the Company drop down menu.
- 6- **Type** field - Select appropriate type from drop down menu.
- 7- **Category** field – Select from the Category drop down menu.
- 8- **Effective Date** field – Enter contract effective date.
- 9- **Start Date** field – Enter contract start date.
- 10- **End Date** field – Enter date for expiration of the base contract (this date is to be updated as extensions are approved).
- 11- **Workflow Status/Rev** fields – Display current workflow status and revision
- 12- **Project Manager** field – Select Project Manager from drop down menu. Can start typing name.
- 13- **RFP-RFQ** field – Enter RFQ number.
- 14- **HB1295 - Approved** field – Enter approved date if applicable, otherwise leave blank.
- 15- **BOR Approved Date** field – Enter approved date if applicable, otherwise leave blank.
- 16- **BOR Approved Amount** field – Enter approved amount, if applicable, otherwise leave blank.
- 17- **NTE Amount** field – Enter the Not To Exceed amount for the contract.
- 18- **K Number** field – Enter the contract K number.
- 19- **Approved Base Cost** field – leave blank. Sums all Project Agreements approved to date.
- 20- **Approved Reimbursable** field – leave blank. Sums all Reimbursables approved to date.
- 21- **DSE Multiplier** field – Enter the negotiated DSE Multiplier
- 22- Click the  icon in the top header.

Program*	Contract No.*	Description	Company	Type
Portfolio ▾	W237507	CSA for Asbestos and Hazardous Mater...	TERRACON CONSULTANTS INC ▾	Project Management CSA ▾
Category	Submittal Type	Effective Date	Start Date	End Date
Asbestos ▾	▾	05-15-2023 📅	05-15-2023 📅	05-14-2026 📅
Master Value Costs	Master Value Days	Workflow Status	Revision	
\$272,067.00	0.00	Approved ▾	0 ▲▼	
User Defined Fields				
Project Manager	RFP-RFQ	HB1295 - Approved	BOR Approved Date	BOR Approved Amount
Allison Wright (University of Houst... ▾)		📅	📅	\$1,500,000.00
NTE Amount	K Number	Approved Base Cost	Approved Reimbursable	DSE Multiplier
\$1,500,000.00	K-23-01044	\$272,067.00	\$0.00	

23- Under the **UH Fields** tab at the top, select the **Dates** tab on the left and enter dates in the **Data** column.

24- Select the **Contacts** tab on the left and enter contact information in the **Data** column.

MainUH FieldsNotesAttachments2WorkflowNotifications1

☐

Spec

Data

Notes

☐

Date to Vendor

☐

Date Partially Executed

1 - 2 of 2<<<1>>>

250 Rows

^ Contacts

☐

Spec

Data

Notes

☐

Primary Contact

☐

Phone

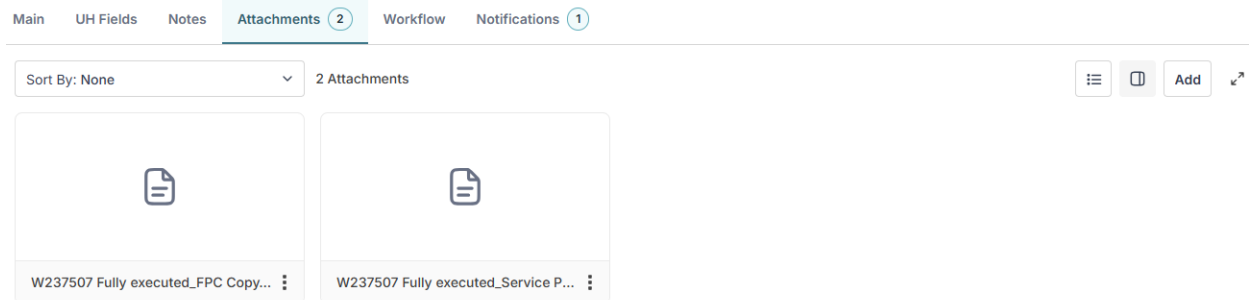
☐

Email

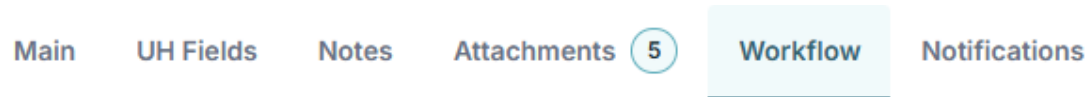
1 - 3 of 3<<<1>>>

250 Rows

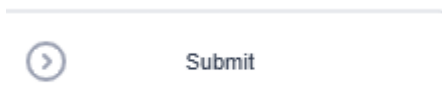
25- Under the **Attachments** tab, add the contract and other documents by dragging to the ‘Drop files here or click the Add button’ section.



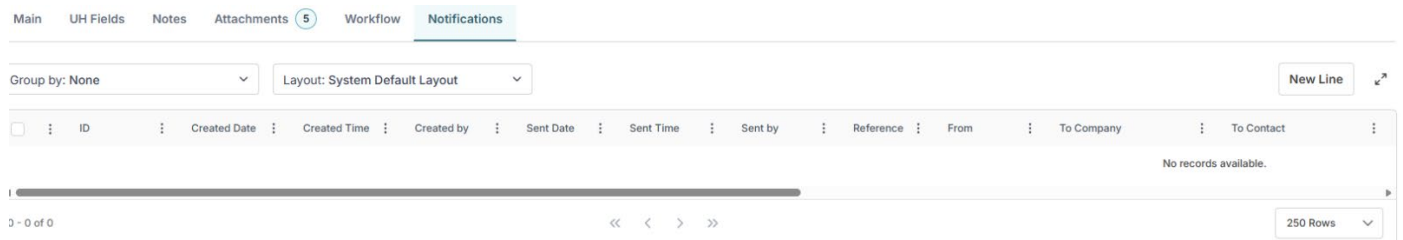
26- Review the work flow under the **Workflow** tab.



27- Click on the click on the **Submit** button and **Save** after the page **refreshes**.



28- To send a copy of the executed Continuing Service Agreement to the Service Provider, select the **Notifications** tab and then **New Line**.



29- To field – Click on the  icon then select Service Provider contacts. To narrow the list, type the company name in the company field and click on the three lines.

30- CC field – Click on the  icon to add PM Web Users as CCs.

31- Manual CC field – Enter any e-mail address for persons not in PM Web. Include “poctract@central.uh.edu” as a manual CC.

32- Notification – Type ‘Fully Executed Contract Document.

33- Subject field – Enter the following: “WXXXXXX [vendor name] CSA ([CSA Category]) Fully Executed Project Agreement [Record #].” For example, “W247007 Contractors CSA (Materials Testing) Fully Executed Project Agreement 07”

34- Include Link check box under the options tab – Ensure this box is NOT checked.

35- Remaining fields can be blank/unchecked.

36- Under the ‘SELECT TO ATTACH TO EMAIL’ list, select the Fully Executed SP Copy attachment.

37- Click on the Save icon

Notification  

Message Attachments Options

From CC

To BCC

Subject Manual CC

Message

Inter 14px B I U abc A                              