

Submitting and Reviewing Bonds and Insurance

Overview: Contractors are required to submit bonds and insurance for review and approval prior to being provided a notice to proceed. This outlines the process for submission and review.

Reference: Contract for bonding and insurance requirements.

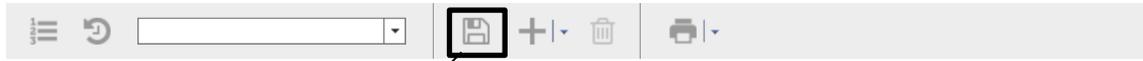
1- Click on **FORMS** from the buttons on the left.



2- Under the Forms, select **Bonds OR Insurance**.



- 3- Click on the  '+' icon.
- 4- **Project Name** - Select the project from the *Select Project* drop down menu.
- 5- **Vendor Name** - Select your firm from the drop-down menu.
- 6- Fill in the information regarding the bonds OR insurance in the appropriate fields.
- 7- On the top bar, click on the  icon to save the header.



7

UNIVERSITY of
HOUSTON
FACILITIES/CONSTRUCTION MANAGEMENT

Bonds

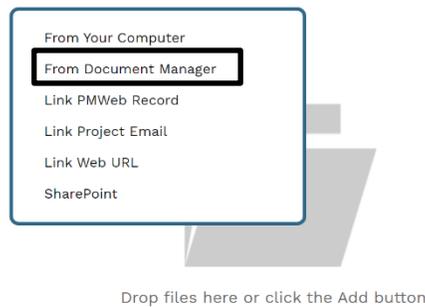
Project Name:	<input type="text" value="4"/>	▼
Vendor Name:	<input type="text" value="5"/>	▼
Performance Bond Number:	<input type="text"/>	
Performance Bond Name of Surety:	<input type="text"/>	
Date of Performance Bond:	<input type="text" value="04-28-2021"/>	
Amount of Performance Bond:	<input type="text" value="\$0.00"/>	
Payment Bond Number:	<input type="text"/>	
Payment Bond Name of Surety:	<input type="text"/>	
Date of Payment Bond:	<input type="text" value="04-28-2021"/>	
Amount of Payment Bond:	<input type="text" value="\$0.00"/>	

8- Select the '**Attachments**' tab

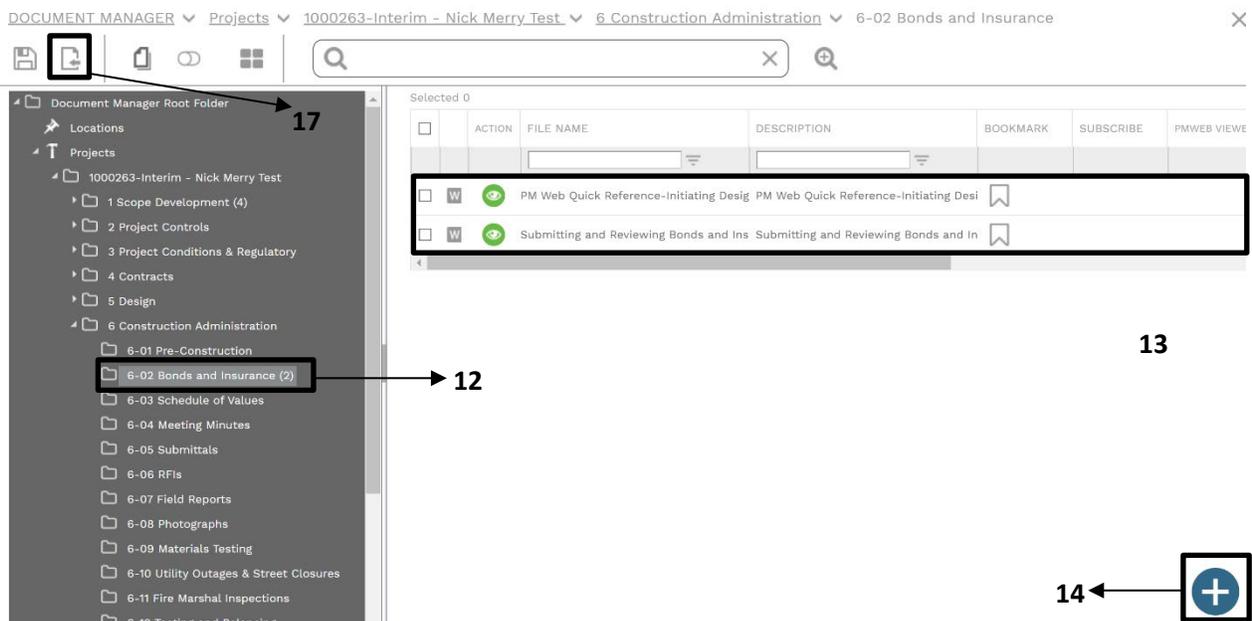
9- Click on the '**+Add**' button

10- Click on the + button and select **Document Manager** from the drop-down list.

11- In the file tree on the left, navigate to the project folder where the file will be stored (6-02 is Bonds and Insurance).



- 12- In the file tree on the left, navigate to the project folder where the file will be stored (6-02 is Bonds and Insurance).
- 13- If the file is already in File Manager, it will be listed.
- 14- To load a file, click on + in the lower right of the window.
- 15- Navigate to, and double click on that file to upload.
- 16- Double click on the file to add it to the record.
- 17- On the top left bar, click on the **Save and exit** icon to save the record.
- 18- Performance bonds, Payment bonds, and each type of insurance shall be separate attachments. File names and descriptions shall identify the document type.
- 19- Original bonds must still be mailed to the University of Houston System for record keeping.



20- Select the **'Workflow'** tab

21- Click on the **SUBMIT** button in the 'Actions' box, then click on the **SAVE** button.



UHS PM

1. Navigate to bond OR insurance record.
2. Review documents and verify that the documents meet contract requirements including scope and amounts
3. Within workflow, return records to vendor if needing corrections OR mark **APPROVE** to submit to Contracts Coordinator.

Contracts Coordinator

1. Navigate to bond OR insurance record.
2. Review documents and verify that the documents are valid including contacting issuer as necessary.
3. Within workflow, return records to vendor if needing corrections OR mark **FINAL APPROVE** if documents have been validated.