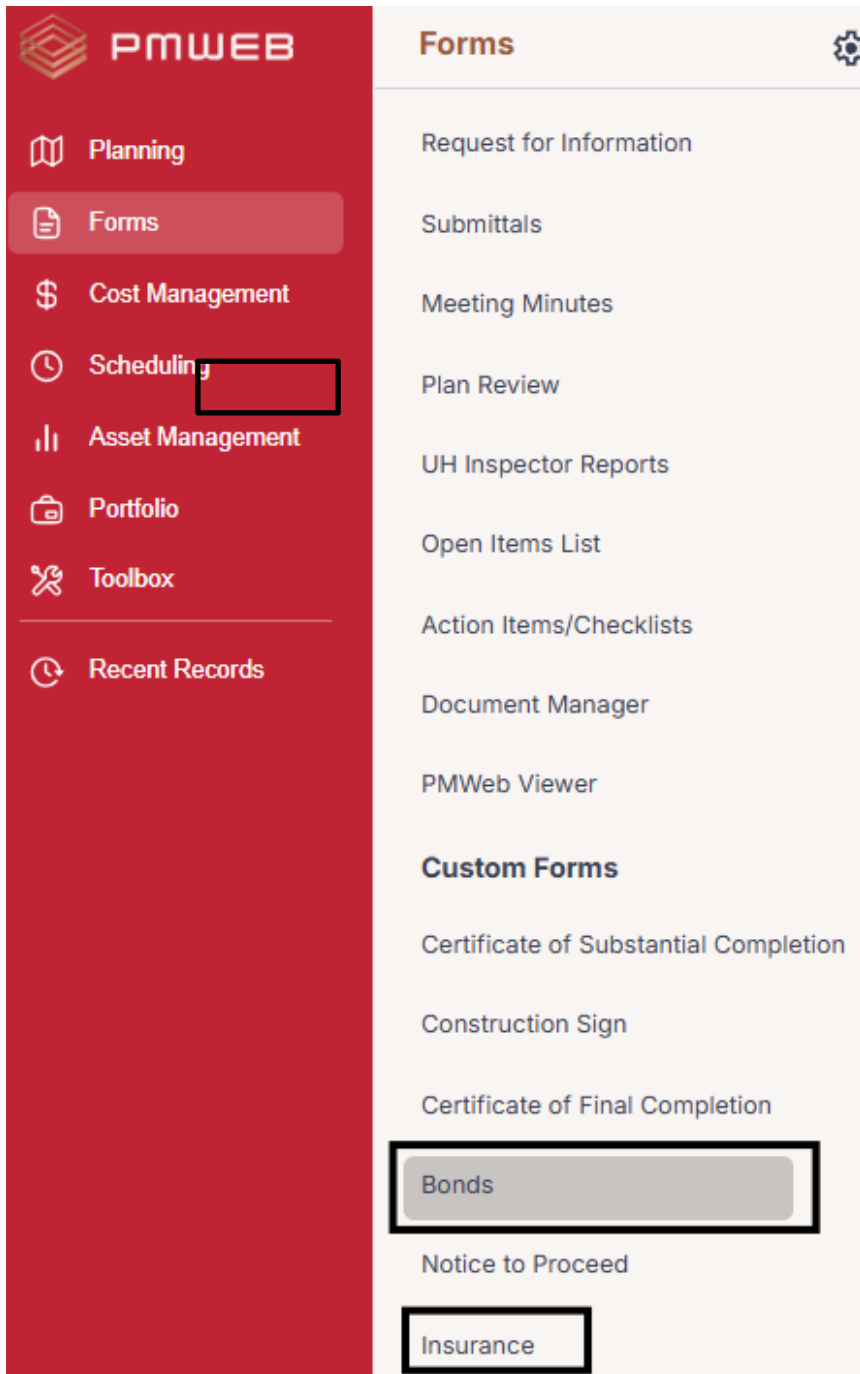


Submitting and Reviewing Bonds and Insurance

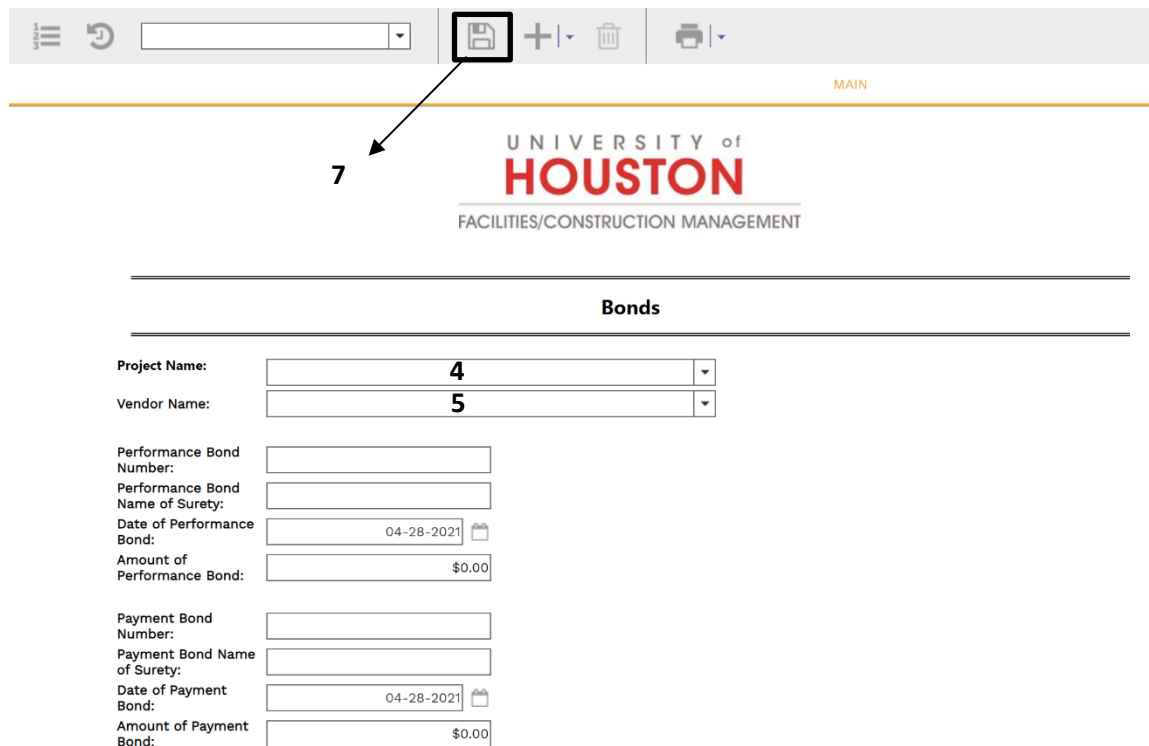
Overview: Contractors are required to submit bonds and insurance for review and approval prior to being provided a notice to proceed. This outlines the process for submission and review.

Reference: Contract for bonding and insurance requirements.

1- Under **Forms**, select **Bonds** OR **Insurance**.



- 2- Click on the **New Record** icon.
- 3- **Project Name** - Select the project from the *Select Project* drop down menu. Start typing name or project number to narrow selection.
- 4- **Vendor Name** - Select your firm from the drop-down menu. Start typing name or project number to narrow selection.
- 5- Fill in the information regarding the bonds OR insurance in the appropriate fields.
- 6- On the top bar, click on the  icon to save the header.



7

UNIVERSITY of
HOUSTON
FACILITIES/CONSTRUCTION MANAGEMENT

Bonds

Project Name:

Vendor Name:

Performance Bond

Number:

Performance Bond Name of Surety:

Date of Performance Bond: 

Amount of Performance Bond:

Payment Bond

Number:

Payment Bond Name of Surety:

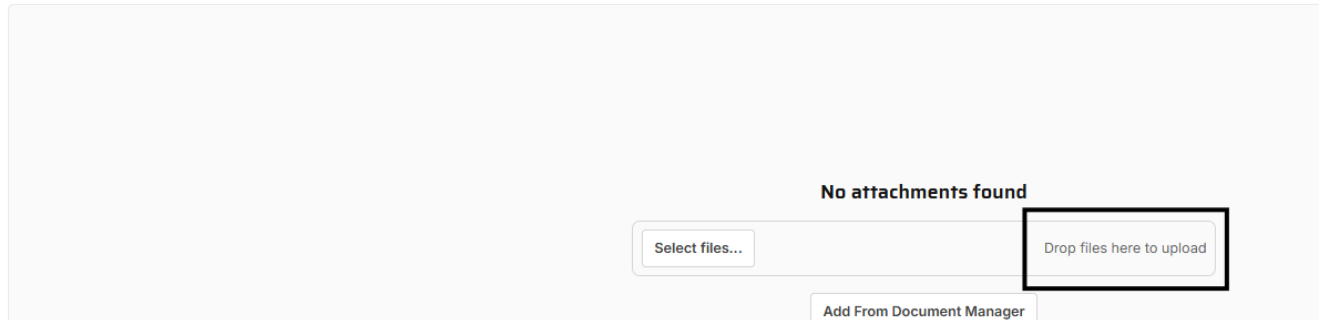
Date of Payment Bond: 

Amount of Payment Bond:

7- Select the **Attachments** tab

8- **Drag and Drop** the files into the rectangle

Main Notes **Attachments** Workflow



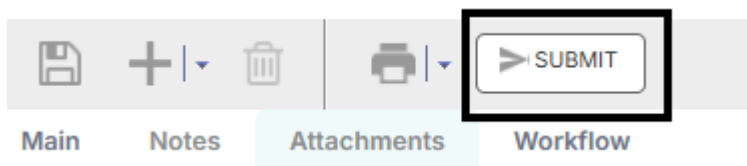
9- On the top left bar, click on the **Save and exit** icon to save the record.

10- Performance bonds, Payment bonds, and each type of insurance shall be separate attachments. File names and descriptions shall identify the document type.

11- Original bonds must still be mailed to the University of Houston System for record keeping.

12- Select the '**Workflow**' tab

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