e-Builder Vendor Initiated Processes

06.06 Pay Requisition and Invoice

When to Use

Use this process to request payment. You must have an MIT username (vndrxxxx@mit.edu) in order to access e-Builder.

Instructions

1. Log into e-Builder (e-builder.mit.edu) using your MIT/e-Builder username and password.
2. Once logged into e-Builder select the project for which you wish to initiate payment.
3. Click on **Processes** in the Project Menu. (Left Side of Screen)
4. Click the **Start Process** button. (Right Side of Screen)
5. Click the **6.06 Pay Req & Invoice - VENDOR (BILL)** process link.
6. Complete the **Invoice Information** Section.

a. Indicate if this is the final invoice by choosing Yes or No to the "Is this the final pay application on the contract" question.
   b. Indicate if the pay application requires AE review.
   c. Enter the period start date.
   d. Enter the period ending date.
7. Complete the **Commitment Invoice Details** section.
   a. Select the Commitment against which you are submitting an invoice.
   b. Once the page refreshes the **Invoice Items** grid appears with distinct commitment lines.
   c. For a Construction contract, enter invoice amounts under columns "E", and if the Pay App includes a Retainage Release enter those amounts under Column J.
   d. For non-construction commitments, enter the requested amounts under the Invoice Amount column.
8. Add Invoice Documents (PDF Format Only). Additional documents can be attached using the "Attached Documents" tab.
9. **Submit** your invoice.

Once you submit the invoice it is sent to the appropriate parties, including the project manager, for review. The project manager can accept the submitted invoice or send it back to you if changes are needed.

You may wish to discuss with the project manager your intent to submit an invoice and what items will be submitted prior to beginning the process.

6.01 Letter of Release/Change Order Request

When to Use

Use this process to initiate a Change Order.

Instructions

1. Log into e-Builder.(e-builder.mit.edu)
2. Once logged into e-Builder navigate to the project for which you wish to request a change order.
3. Click on **Processes** in the Project Menu. (Left Side of Screen)
4. Click on the **Start Process** button. (Right side of Screen)
5. Click the **06.01 Letter of Release/Change Order Request** (COR) process link.
6. Complete the **Change Order Request Details** section. This section includes a field to attach supporting documentation.
7. Complete the Change Details section.
    a. Select the Commitment.
    b. Indicate a Date of Change.
    c. Choose a reason code from the dropdown menu.
8. In the **Commitment Change Custom Fields** section add the Change Justification.
9. Click **Add All Existing Items**. The Commitment Change Items section is populated with all Commitment lines.
10. In the **Change Amount** column enter the change amount for one or more commitment lines.
11. Additional supporting documentation can be attached in the **Attached Documents** tab.
12. Use the Add Additional Scope Commitment Item section to add new commitment lines.
13. **Submit** the Change Request.

6.02 – General Contract Change Order (GCCO)

When to Use

Use this process to combine previously approved Change Order Requests (COR) into a Contract Change Order for final approvals.

Instructions

1. Log into e-Builder. (e-builder.mit.edu)
2. Open the project for which you wish to begin a GCCO.
3. Click on the **Processes** link in the Project Menu. (Left side of screen)
4. Click the **Start Process** button. (Right side of screen)
5. Click the **6.02 – General Contract Change Order (GCCO)** link.
6. Complete the **Change Order** section.
7. You may attach any documents that support the GCCO to the **Attached Documents** tab.
8. You must attach one or more Change Order Requests to a General Contract Change Order.
9. To attach COR's:
   a. Click on the **COR's** tab.
   b. Click the **Attach Existing** button on the right side of the screen. The Filter Processes screen appears.
   c. On the Filter Processes screen, change Status to Pending, click the **Filter** button, select all COR's that you wish to process as part of this General Contract Change Order. When finished click the Attach Existing button. Note that zero dollar changes must be grouped together.
10. Complete the required fields on the **Details** tab.
11. Click the **Submit** button.

6.03 Professional Services Amendment (PSA)

When to Use

Use this process to request an amendment to a professional services agreement.

Instructions

1. Log into e-Builder. (e-builder.mit.edu)
2. Open the project for which you wish to begin a PSA.
3. Click on the **Processes** link in the Project Menu. (Left side of screen)
4. Click the **Start Process** button. (Right side of screen)
5. Click the **6.03 – Professional Services Amendment** process. (PSA) link.
6. Complete the PSA section by entering a Brief Description of Change and an Amendment number. (The number can match a vendor's internal system numbering)
7. In the **Commitment Change Details** section select the Commitment to be changed.
8. Enter the Date of Change.
9. Enter the Reason Code.
10. In the **Commitment Change Custom Fields** section enter the Justification for the change.
11. Click the **Add All Existing Items** button. As a result, a grid will be populated with existing Commitments.
12. Locate the **Change Amount** column in the grid and enter a change for one or more commitment lines.
13. If a new Commitment line is needed use the **Add Additional Scope Commitment Item** section.

14. Click the **Submit** button.

Assistance

Assistance with these processes is available. Please send an email to DOF-ebuilder-info@mit.edu with a brief description of the issue and your contact information. A member of the MIT DoF e-Builder team will respond.