

Code: X = Input Responsibility  
V = Verify Information is Loaded

Campus Planning & Design  
Projects Mangement Team

Capital

**PITS INPUT RESPONSIBILITY MATRIX**



SBC Project Manager	Construction Specialist	Director of Construction	Contract Officer	Contract Specialist	Accountant	AVP Campus P & D
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**Designer Initial Agreement**

SBC Project Manager Obtains Information for Designer Agreement, updates Outworld in PITS, inputs Contract Data in PITS, prepares Designer Agreement SBC-6	X						V
Contract Officer enters offered date in PITS after transmittal of Designer Agreement and Instructions to Designer	V			X			
After Designer signs contract and submits package to Contract Officer, Contract Officer enters Received Date into PITS, adds SBC-1 Form	V			X			
SBC Project Manager reviews completed Designer Agreement, completes Designer Agreement Checklist, and logs OK date into PITS	X						
Once Designer Agreement is signed by State Architect, Legal Counsel, and the University President, Contract Officer scans and uploads into PITS, and enters contract date matching President's signature into PITS	V			X			
Accountant verifies agreement amount in PITS	V				X		

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**Designer Supplemental Agreement**

SBC Project Manager enters Supplemental data into PITS

X

V

SBC Project Manager transmits Designer Supplemental Agreement and instructions to Designer, enters offered date into PITS

X

V

After receipt from Designer, SBC Project Manager reviews signed Supplemental Agreement, completes Designer Supplemental Checklist, and logs OK date into PITS

X

V

Once Designer Supplemental Agreement is signed by required approval entities,, Contract Officer scans and uploads into PITS, and enters contract date matching signature date into PITS

V

X

Accountant verifies obligation in PITS

V

X

**Construction Bidding**

After Bid Date is assigned, Contract Specialist enters Invitation to Bid date in PITS, and generates PITS bid summary

V

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During Solicitation, Contract Specialist receives Bid Documents/Addenda and enters data into PITS

V X

After bid opening, once SBC Project Manager approves Designer recommendation of award, Contract Specialist enters data into PITS

V X

**Construction Agreement**

After receiving instructions to pursue award, Contract Officer creates Contract Package and enters data into PITS

V X

After Awardee signs agreement and returns with required documents, Contract Officer enters data into PITS, then prints SBC-7 from PITS and forwards to SBC Project Manager

V X

After AVP CPD routes agreement for signatures by State Architect, Legal Counsel, and University President, Contract Officer inserts appropriate dates on Agreement and Bonds, and enters dates into PITS.

V X

Contract Officer then uploads job files and updates PITS Construction

V X

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Contract Screen							
Account verifies obligation	V					X	
<b>Construction Contract Modifications</b>							
Designer issues RFP, Construction Specialist logs / tracks RFP's in PITS	V	X	V				
After Contractor responds with appropriate backup, Designer issues recommendation, Construction Specialist generates Modification in PITS	V	X	V				
After signature by Designer and Contractor, Construction Specialist forwards to Director of Construction for review and forwarding to AVP CPD who signs and obtains signatures of State Architect, Legal Counsel, Chief Financial Officer, and University President, Contract Officer inserts appropriate dates into PITS	V		V	X			
Contracting Officer forwards to Accountant, who verifies obligation and makes appropriate accounting entries into PITS	V					X	





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		X			V	
		V			X	
<b>Regional Consultants Pay</b>						
X						V
X					V	
X					V	
V					X	

Construction Director compares G 702 entries with PITS and makes corrections if necessary, then approves in PITS, sends to accounting

Accountant reviews, makes entries in Edison, sends register to TSSBA or F&A requesting disbursment, then enters into PITS

SBC Project Manager receives Pay Request, date stamps, adds approval stamp, enters into PITS Pay Request Screen and assigns payment type

SBC Project Manager confirms \$ amount in PITS and approves

SBC Project Manager Uploads invoice, enters approved dates into PITS and enters sent to Account date

Accountant reviews, makes entries in Edison, sends register to TSSBA or F&A requesting disbursment, then enters into PITS

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**Direct Billing**

After Accountant enters into Edison as General Pay and audits,  
SBC Project Manager enters into PITS and approves date

X					V	
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**Vendor Billing**

After SBC Project Manager or Construction Director approves invoice and  
forwards to Accountanting, Accountant initiates payment process and  
payment in PITS General Pay

V					X	
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**Project Payments Funded by TSSBA, Fund 32**

Construction Specialist reviews/certifies payment, enters into PITS, and  
sends to Accounting

Director of Construction reviews, verifies PITS and initials, then makes entry  
into PITS and makes pre-list call to TSSBA

	X	V				
			X		V	



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After acknowledging adjustments and re-audit, Accountant makes entry into Edison and Warrants entry into PITS

V X

**Designer Evaluations at End of Design**

Contract Specialist prints SBC-7 from PITS, forwards to SBC Project Manager

V X

SBC Project Manager completes form, forwards to AVP CPD, enters date in PITS

X V

After AVP CPD reviews and initials, SBC Project Manager sends to Designer, State Archtect, and uploads to PITS

X V

**Designer/Contractor Eval. At Substantial Compl.**

At Construction Substantial Completion, Contract Specialist prints SBC-8 and CER-1 from PITS, completes form, forwards to Director of Construction

X V

Director of Construction review, signs, enters date into PITS

V X

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**Close-Out**

V				X									
V										X			
V												X	
X										V			

After Substantial Completion and Final Inspection, Director of Construction goes to Master Project Overview in PITS, selects link to Project Archival and select Approve

Accountant reconciles PITS and Edison, notes funds to liquidate, enter PITS Archival and select Approve, initial and date form and route

After reviewing Closure Nomination, AVP CPD upgrades PITS SBC-1 form to pending, initial/date form and route by selecting Archival in PITS and Approve

SBC Project Manager enters Funding Liquidations in PITS, upgrades PITS SBC-1 to Approved Current, invokes PITS Project Archiving function, initial and date form