Reference Guide

Subcontractor Prequalification v10x

By CMiC



Proprietary Notice

The contents of the CMiC software product, including both this manual and the program components, are proprietary to Computer Methods International Corp. (CMiC), are copyright protected and are considered Confidential Information by CMiC. All rights are reserved by CMiC. A copy of the manual and the program has been provided to the original licensee under license with CMiC strictly for their own use under the terms of the license. All copies of this manual whether in print or electronic format must contain a copy of this Proprietary Notice. Any selling, licensing or other distribution of the contents of either this manual or the program components, whether for profit or not, is unlawful and may subject the violator and the original licensee to termination of license, criminal charges, civil action, or any combination of these.

Copyright © 2019

Computer Methods International Corp. 4850 Keele Street Toronto, Ontario M3J 3K1 Canada

Risk of Use Notice

The CMiC software product, including both this manual and the program components, is licensed on an "AS IS" basis. The entire risk as to the results of its use is with the licensee. Except in those jurisdictions which impose certain warranties by statute which may not be waived by one or more of the parties, and only to that extent, Computer Methods International Corp. (CMiC) makes no warranties whatsoever, either expressed or implied, with respect to the quality, performance, merchantability or fitness for any particular purpose of any or all components of this software product, except as provided in the licensee's license agreement. The licensee (and not CMiC or its agents) will be solely responsible for the costs of all service, or of any defect in this software product and any incidental or consequential damages caused or alleged to be caused either directly or indirectly by the software product to the licensee or any other person, including, but not limited to, any interruption of service, or loss of business or anticipatory profits, even if CMiC has been advised of the possibility of such damages.

"Computer Methods International Corp" and "CMiC" are registered trademarks of Computer Methods International Corp. Oracle, Oracle9^{iTM}, Oracle Application Server11gTM, Oracle Database 11gTM, Oracle® DiscovererTM are trademarks or registered trademarks of Oracle Corporation.

User Reference Guide – Version: CMiC Open Enterprise v10x

Printed: September 25, 2019

Contents

SUBCONTRACTOR RELATIONSHIP MANAGEMENT	1
OVERVIEW – SUBCONTRACTOR RELATIONSHIP MANAGEMENT	1
SUBCONTRACTOR PREQUALIFICATION	
INTRODUCTION	
SUBCONTRACTOR LOG	4
SUBCONTRACTOR PREQUALIFICATION APPLICANTS	7
Locations – Tab	
General – Tab	9
User Defined Fields – Tab	
Insurance – Tab	
Safety – Tab	
Financial – Tab	
Surety – Tab	
Litigation – Tab	
Approvals – Tab	
Submission Log – Tab	
Call Log – Tab	
Project History – Tab	
References – Tab	
Attachments – Tab	
Additional Information Options	
SUBCONTRACTOR PREQUALIFICATION – SCREEN	20
Locations – Tab	
General – Tab	
User Defined Fields – Tab	
Insurance – Tab	
Safety – Tab	
Financial – Tab	
Surety – Tab	
Litigation – Tab	
Approvals – Tab	
Submissions Log – Tab	
Call Log – Tab	
Project History – Tab	
References – Tab	
Contacts – Tab	
Attachments – Tab	
SELF SERVICE	
OVERVIEW – PREQUALIFICATION SELF SERVICE	
SUBCONTRACTOR PREQUALIFICATION QUESTIONNAIRE	
Company Name and Locations	
License, Trade, and Business Status	
Insurance and Safety Information	

Surety and Financial Information	
Financial Contacts, Litigation Information, and References	
Attachments and Submission	
PREQUALIFICATION SETUP	41
Key Integration Points	41
PREQUALIFICATION CONTROL & MAINTENANCE OPTIONS	41
PREQUALIFICATION CONTROL	
Control Flag to Make References Mandatory in Self Service	
Alternate Self Service URL	
SUBCONTRACTOR RATING SETUP	44
SUBCONTRACTOR RATINGS – MOBILE INTEGRATION	45
Overview – Setup & Administration	
Subcontractor Prequalification – JSP	
CMiC Field – JSP	
Review Moderation – Screen	
Subcontractors – Screen	
ADDENDUM	53
PREDUALIFICATION REQUIRED INDICATOR	53
PREQUALIFICATION LIMITS AT CONTROLLING BP LEVEL	
FREQUENTLY ASKED QUESTIONS	55
COMMON QUESTIONS ABOUT SUBCONTRACT PREQUALIFICATION	55
INDEX	61

Subcontractor Relationship Management

Overview – Subcontractor Relationship Management

CMiC Subcontractor Relationship Management helps an organization manage subcontractors from start to finish, by integrating all subcontracting activity into the organization. Subcontractors are a vital part of completing any construction project, but the mismanagement of subcontractors can present a substantial risk that can threaten the stability and profitability of a project.

CMiC Subcontractor Prequalification is designed to be applicable both for general contractors and subcontractors. CMiC Subcontractor Prequalification enables collaboration in line with the PM JSP approach, and it automates the pre-qualification process. Applicants may submit their documents such as financial statements, insurance certificates, and other supporting documents through the web-enabled self-serve application, and the owners can go through the information to determine the prequalification status of the applicants.

Create, track, and approve vendor applications online and track multi-tiered contracts. Prequalify subcontractors before they begin work on a project, and store ratings and past work performance for future reference to ensure that subcontractors meet the organization's high standards of quality and reliability. Manage exposure through the detailed tracking of lien waivers, releases, and insurance certificates, and gain full control of all subcontracting arrangements, including contracts, billing, and payments.

CMiC Subcontractor Relationship Management includes:

- Prequalification
- Subcontractor Rating
- Subcontractor Management

This document covers both prequalification and rating. See the *Subcontract Management* guide for details on managing subcontracts.

Subcontractor Prequalification

Introduction

Subcontractor Pred	qualification		DnB Rati	ng Reset Self-Service Password Print Report Approve Su	ubcontractor Check Spelling Add Workflow Delete Applicant Save 🏼 🍞 🏠 🏠
호 응 원 CMiC Field Menu			A	pplication	
			Subcontrac	tor Prequalification	
search GO	Code 144	Tax ID	77771	Prequalification Status Update Prequal 🗸	Insurance Approval Level
Project: Freshmart Office Building - Chicag	Company New Haven Builders & As	soc.		Insurance Category 🗸	Approval Status
Communication Management	Also Known As			Aggregate Project Limit:	Single Project Limit:
Subcontractor Pregualification	Legal Name			Joint Check	
B Dubcontractors	Parent Corp.			CAP Approved	CAP Approved
Applicants	Ctrl Business Partner			Host Region	Lineat
Subcontractor Rating Setup	Street 61 Churchil Meadowr			Last Approval Data	Renewal Date
Prequalifications Control	Culto			Wadday Status Les desited	Drop val Dom (and Drop val Dom (and
Workflow Notification	City James City			Marker Col	
Budget & Cost Management	City Jesey City			Financial S	tatement Onen Shon 🛛
🗄 🦲 Site Management	State New Jersey	¥ 21	p 89012	OSHA 30	30A Form Sample Insurance Cert.
H C User-Defined Loos	Country			Bonding Referen	ce Letter Additional Comments
🗉 🦲 File Maintenance	Contact Mr. Janoy				
E Security	Phone 603-1788-2391	Fa	× (999) 999-9999		
le Subcontractor Reviews	Toll Free	E-ma	il janoy@cmic.ca		
_			Projec	History Totals	
	Currer	t Contract Amount 0.00	Bill To Date 0.00	Remaining To Be Billed 0.00	Largest Contract To Date 0.00
	General Contacts User-Defin	ed Fields Insurance Safety	Financial Financial Surety	Litigation Approvals Submission Log	Call Log Project History References Attachments 🗸
			Header 1		
	UDF 1				
	Comments				
			Header 2		
	E-Mail stephanic	©cmic.ca			
			Compliance		
	Acknowledge that you have reviewed our	Subcontractor code of conduct, that you	accept its terms and will adhere to its pr	inciples, and that you will report any suspect violatio	n of the code known to you.
		Cut and Paste the t	following URL to access the Supplier Code	: https://cmic.ca/.	
	Acknowledgement Date	69	Advnowledge	Date Forms	
	ACK DATE ADF	10	File	Attachments 2	

Sample of Subcontractor Prequalification

Internal users are presented with the options as presented within the Project Management Treeview within a node. Standard functionality of PM Treeview Menu Maintenance allows repositioning and labeling of the options as per their own requirements. For simplicity, the Treeview being shown in several of these screens was modified to eliminate display of the remaining PM options.

The Subcontractors and Applicants log views present the standard set of buttons for printing, querying, filtering, and sending to spreadsheet.

Subcontractor Log

CI	MIC FIELD			Print Report: Show Filter: Sond To Eprecublect: Enter Query 👔 ն 🏠								
¢ ⊟ €	CMiC Field Menu						Vendor Pregualification - Partners					(Filtered)
Conrela		2517	more rows are avai	lable. Click here to retrieve all rows.								
bearui	00	41	Tax ID	Name	Partner Code	Preq. Status	Approval Status	CAP Approved Date	Single Project Limit	Days Until Renewal Active Flag	g Insurance Cat. Code 1	Insurance Category 🗠
🖃 🗁 Pr	oject: Freshmart Office Building - Chicag	4	456789	Tuesday Blues Construction	TUEBLUE	Received	Subs Are Approved			-132 Y		
± 🔁	Communication Management	4	000000000000000000000000000000000000000	new application	LGAPPSUB	Received	Subs Are Approved		1,000.00	Y		
	Document Management	•	8551	Gracious Living	GRACIOUS	Received	Prequal Date is Blank or > 365 Days Old		250,000.00	-208 Y		
	Subcontractors	•	1111	TES-V10 Applicant - Oct. 13- check this out again	SUS-PRQ5	Received				Y		
	Applicants	•	8723	Whitlock & Associates	WHITLK01					Y		
	Self Service	•	25-1503596	Wellington Power Corp	024373		Subs Are Approved			Y		
	Subcontractor Rating Setup	4	777771	Veritas Incorporated	VERITAS	Pending	Regional Hold - Read Comments for Explanation			Y		
	Workflow Notification	4	2309 2309	Validation_Procedures	23092014	Update Prequal				Y		
🖻 💼 🧰	Bid Management	4	test1	test1	TEST1	Update Prequal				Y		
E 🗎 💭	Budget & Cost Management	4	67222	test applicant	TESTBP22	On Hold Missing Data	Pregual Date is Blank or > 365 Days Old			Y		
	Reports	4	TAR12	Tarun Company	TAR12	On Hold Missing Data				Y		
Ū.	User-Defined Logs	4	ss22	ss22	SS22	Update Pregual	Regional Hold - Read Comments for Explanation			Y	1	
÷	File Maintenance	4	7811	Shellcom Partners Inc.	SHELLCOM				10,000,000.00	Y		
	Subcontractor Reviews	4	6210	Screws and Bolts Limited	CREWS	Update Prequal	Prequal Date is Blank or > 365 Days Old			Y		
10	new folder	4	416439	Royal Planters	ROYAL439	Update Pregual	Safety CAP and/or Insurance Deficiencies	04-05-2018		-445 Y	V N	V
		4	9343	Regulated Contractors Ltd.	JSP-BP3A	Sent For Review	Needs Management Committee Sign-off		2,000,000.00	-473 Y		
		4	PV151127	PV 2015/11/26 - SC 3	PV151127					Y		
		4	PV151126	PV 2015/11/26 - SC 1	PV151126	Update Prequal			10.00	Y		
		٩.	882010789	Pregual Applicant Sample 1	TSTPRQ1	Update Prequal	Needs Management Committee Sign-off		5,000,000.00	-3171 Y		
		4	882010789	Pregual Applicant Sample 1	QAP1	Workflow Rejected	Prequal Date is Blank or > 365 Days Old		5,000,000.00	-3171 Y		
		4	azu1	PeterC1	100	Update Prequal			2,500.00	Y		
		4	31313	Partitions and Barriers Ltd.	PART1	Pending	Safety CAP and/or Insurance Deficiencies			Y	1 1	
		4		Open Source Construction Inc.	OPEN					Y		
		4	0911	Non-Controlling	MMER	Update Prequal	Prequal Date is Dlank or > 365 Days Old		100,000.00	Y		

Subcontractor Log

The Subcontractor log, by default, displays only partners that are marked as "Prequalification Required". This results in a smaller listing of those appropriate for viewing rather than the entire business partner listing. If the business partner is pre-existing, setting the business partner to prequalification required will now make prequalification settings applicable to that business partner.

BUSINESS PARTNER M	BUSINESS PARTNER MAINTENANCE													
Business Partner Pre-qualification	n is Required													1
M														^
🖗 Search 🚛 Insert 🚈 De	elete 🛛 🔶 Previo	us 📦 Next 🍭	Workflow	s •	🔒 Report Options	👻 🕎 Impo	ort 🖉 Atta	achments	Notes 🛛 ECM Documents	▼ Q 0 0 User Extensions				
Business Partner Code	A1BRICKS				A1 Bricks Manufactu	ks Manufacturing Company Save								
Business Partner OM	Classification	Market Sector	CSI	Add	ress Classifiers	Territory	Bank	Company	Company Type					
Also Known As	A1BRICKS													
Legal Name	A1 - Bricks' Man	ufacturing & Compa	any											
Abbreviation	A1BRICKS				Short Name A1	Bricks Manuf			Valid					
Ctrl Business Partner														
Street	123, Bricker Stre	eet							Customer					
Suite	500, Floor V								Vendor					
City	Chicago								SSN SSN					
State/Province	IL				Illinois									
Country	US				ZIP/Postal Code 62	2541			Available For Dispatch					
Attention	Mr. Rectangle B	ricker							Funding Source					
Phone	8728069963				Fax									
Email	Rohini@cmic.ca													
Web Site	www.cmic.ca													
Legal Entity Type	CORP			۸	Corporations									
Registration Code	956326154				VAT Registration #		45869856							
Class	CONC			۸	Concrete									
1099	х			۸	Exempt									
Start Date	01-01-2011			2	One Time Busir	ness Partner	Active	Prequal	ification Required					
	Contacts	/endor Custom	er Up	late A	Address Update	1099 Code							, j	
														Ļ

[Print Report] - Button

С	MIC FIELD								Print Rep	port Show Filter	Send To Sp	readsheet Enter Qu	*** [/ 1	a
\$⊡€	CMiC Field Menu						Vendor Pregualification - Partners						(Filter	ed)
Search	60	2517 m	ore rows are avail	able. Click here to retrieve all rows.										-
		+	Tax ID		Partner	Preq. Status	Approval Status	CAP Approved	Single Project	Days Until Renewal	Active	Insurance Cat.	Insurance	^
	roject: Freshmart Office Building - Chicag	4	456789	Tuesday Blues Construction	THERI HE	Received	Subs Are Approved	oute	CIIIX	-132	Y	Couc	cutegory	
	Decument Management		909099999999	new application	LGAPPSUR	Received	Subs Are Approved		1.000.00	-102	, v			
Ξē	Subcontractor Prequalification		8551	Gracious Living	GRACIOUS	Received	Pregual Date is Blank or > 365 Days Old		250.000.00	-208	Y Y			
E	Subcontractors	•	1111	TES-V10 Applicant - Oct. 13- check this out	SUS-PRQ5	Received	,				Ŷ			
	new application	•	0725	Whitlock & Associates	WHITLK01						Υ			
	Gracious Living	• 🗹	25-1503596	Wellington Power Corp	024373		Subs Are Approved				Y			
	- Applicants	∢ ⊠	777771	Veritas Incorporated	VERITAS	Pending	Regional Hold - Read Comments for Explanation				Y			
	- Self Service	•	2309-2309	Validation_Procedures	23092014	Update Prequal					Y			
	- Subcontractor Rating Setup	•	test1	test1	TEST1	Update Prequal					Y			
		•	67222	test applicant	TESTBP22	On Hold Missing Data	Prequal Date is Blank or > 365 Days Old				Y			
÷.	Bid Management	•	TAR12	Tarun Company	TAR12	On Hold Missing Data					Y			
÷.	Budget & Cost Management	•	\$\$22	\$\$22	SS22	Update Pregual	Regional Hold - Read Comments for Explanation				Y	1	1	
	Site Management	•	7811	Shellcom Partners Inc.	SHELLCOM				10,000,000.00		Y			
. mē	User-Defined Logs	4	6210	Screws and Bolts Limited	CREWS	Update Pregual	Pregual Date is Blank or > 365 Days Old				Y			
÷.	File Maintenance	•	416439	Royal Planters	ROYAL439	Update Pregual	Safety CAP and/or Insurance Deficiencies	04-05-2018		-445	Y	v	v	
	Security	•	9343	Regulated Contractors Ltd.	JSP-BP3A	Sent For Review	Needs Management Committee Sign-off		2,000,000.00	-473	Y			
	new folder	•	PV151127	PV 2015/11/26 - SC 3	PV151127						Y			
		+ 🗆	PV161126	PV 2015/11/26 - SC 1	PV161126	Update Prequal			10.00		Y			
		• 🗆	882010789	Pregual Applicant Sample 1	TSTPRQ1	Update Pregual	Needs Management Committee Sign-off		5,000,000.00	-3171	Y			
		4	882010789	Pregual Applicant Sample 1	QAP1	Workflow Rejected	Pregual Date is Blank or > 365 Days Old		5.000.000.00	-3171	Y			
		4 🗆	azu1	PeterC1	100	Update Prequal			2,500.00		Y			

The checkboxes in the log are tied in with the [**Print Report**] button allowing output from multiple partners in a single step. Also, users have the ability to select/unselect all the subcontractors from the list by checking/unchecking the box in the header.

[Show Filter] - Button

CMIC FIELD									Print Re	eport Show Filter S	Send To S	preadsheet Enter Q	verv 🕻 🗈 🍙
‡ 🕀 € CMiC Field Menu			Filter										^
Search	Column	Operator		Value		Example Value							
Project Freshmart Office Durklos Occursition Management Communication Management Occursition Management Occursition O	Tax D Name Partner Code Preq. Status CAP Approved Date Single Project Limit Active Flag Davs Unit Renewal Insurance Cat. Code Insurance Category Prequat. Required		Ŷ			'Xyz' 'Xyz'							
Ste Management Deorts Reports Deor Defined Logs Deor Defined Logs File Maintenance Security Security	Save As Default The following substitut Use the DD-MON-YY for 2517 more rows are on	Reset To System I ion variables are availab rmat for Date values. alable, Click here to re	Defaults Show ble for fitering: &today, &use trieve all rows.	All Filters mane, 8user	Clear Reset	Submit Cancel type, &contact. Vendor Prequali	fication - Partners						(Filtered)
L new folder	Tax ID 4 456789 4 9090999990 4 8551	Tuesday Blues Co new application Gracious Living	Name	Partner Code TUEBLUE LGAPPSUB GRACIOUS	Preq. Status Received Received Received	Approved Subs Are Approved Subs Are Approved Pregual Date is Blan	wal Status k or > 365 Days Old	CAP Approved Date	Single Project Limit 1,000.00 250,000.00	Days Until Renewal -132 Y Y -208 Y	Active Flag	Insurance Cat. Code	Insurance Category
		Whitlock & Associat Wellington Power C	t - Oct. 13- cneck this out les orp	SUS-PRQ5 WHITLK01 024373	Received	Subs Are Approved				Y Y V			

The [Show Filter] button allows viewing and changing of the current filter set on the log. This is the standard filtering option provided on all JSP Log screens.

The default filter is to only show business partners where the 'Prequalification Required' box is checked.

[Send To Spreadsheet] - Button

C	MIC FIELD									Print Rej	port Show Filter Send	To Spreadsheet Enter	Query 🔓 🖬 🏫
¢ÐĐ	CMiC Field Menu						Vendor Pregualification - Pa	ortners					(Filtered)
Saarch	60	2517 m	ore rows are avai	able. Click here to retrieve all rows.									
search	0	+		Name	Partner	Preq. Status	Approval Status		CAP Approved	Single Project	Days Until Acti Renewal Fla	ve Insurance Cat.	Insurance ^
	Project: Freshmart Office Building - Chicag		456789	Tuesday Blues Construction	THERINE	Received	Subs Are Approved				-132 V	3 0000	concyse (
	Communication Management		9090999999999	new application	LGAPPSUR	Opening PMSCPR	EQUALBP.cev		×	1.000.00	-152 I		
I I	Subcontractor Pregualification			Gracious Living	CRACIOUS					250,000,00	202 ¥		
	E Cubcontractors		0001	TES-V10 Applicant - Oct. 13- check this out	GRACIOUS	You have chosen	to open:		_	200,000.00	-200 1		
	- Tuesday Blues Construction	•	1111	again	SUS-PRQ5	D PMSCPPEC	MALPROV		-		Y		
	new application	◀ □	8723	Whitlock & Associates	WHITLK01	a moenae	toneoneon				Y		
	TES.V10 Applicant - Oct 13- check	4 ⊠	25-1503596	Wellington Power Corp	024373	which isi N	licrosoft Excel Comma Separated V	alues File			Y		
	- Applicants	4 ☑	777771	Veritas Incorporated	VERITAS	from: http:	//test4v10.cmic.ca://85				Y		
	Self Service	+ 🗆	2309-2309	Validation_Procedures	23092014						Y		
	- Subcontractor Rating Setup	4 D	test1	test1	TEST1	What should Fire	efox do with this file?				Y		
	Prequalfications Control Workflow Notification	▲ □	67222	test applicant	TESTBP22	Open with	Microsoft Excel (default)		~		Y		
•	Bid Management	4 D	TAR12	Tarun Company	TAR12	O Save File					Y		
	Budget & Cost Management		8822	8522	\$\$22						Y	1	1
P	Site Management		7811	Shelicom Partners Inc	SHELLCOM	Do this aut	comatically for files like this from no	ow on.		10 000 000 00	Y		
	liser-Defined Long		6210	Screws and Bolts Limited	CDEWC								
	File Maintenance		416439	Royal Planters	ROYAL439			ок	Cancel		-445 Y	×	v
B (Security		9343	Regulated Contractors Ltd	ISD.803A					2 000 000 00	.473 V		
	Subcontractor Reviews		0040		01/15/107					2,000,000.00			
	I lew loider		PV131127	PV 2015/11/20 - 3C 3	PV101127	Undete Descuel				40.00	1		
			19101120	PV 2015/11/26 - 50 1	19101120	Opdate Prequal				10.00	*		
		• •	882010789	Prequal Applicant Sample 1	ISIPRUT	Update Prequal	Needs Management Committee Sign-	-011		5,000,000.00	-31/1 Y		
		▲ ∟	882010789	Prequal Applicant Sample 1	QAP1	Workflow Rejected	Prequal Date is Blank or > 365 Days	Old		5,000,000.00	-3171 Y		
		• 🗆	azu1	PeterC1	100	Update Prequal				2,500.00	Y		
		4	31313	Partitions and Barriers Ltd.	PART1	Pending	Safety CAP and/or Insurance Deficie	encles			Y	1	1
		4		Open Source Construction Inc.	OPEN						Y		

The [Send To Spreadsheet] button available in all JSP Logs is provided to export the log data currently displayed to a CSV/Excel file. This is useful when someone wants to perform more analysis on the data or to transfer for external processing and reporting.

[Enter Query] - Button

Log records can be filtered using the query feature. The query criteria is remembered for the current log while the user drills into a detail record and returns back to the log. The sort order also is remembered while the user works with the same log.

To query the log, simply click the [**Enter Query**] button, and a blue line of empty fields will be displayed above the log records. Enter the value or query criteria for record selection. Refer to the sample below.

CMIC FIELD								Print Rep	ort Send To Spre	adsheet Clear (Query Execute Que	rv [}€	â
¢ ⊟ € CMiC Field Menu						Vendor Prequalification - Part	ners						
Search	2522 moi	re rows are available	. Click here to retrieve all rows.										
	-	Tax ID	Name	Partner Code	Preq. Status	Approval Status	CAP Approved	Single Project Limit	Days Until Penewal	Active Flag	Insurance Cat.	Insurance Category	^
Project: Freshmart Office Building - Chicag Ommunication Management		1%											1
Document Management Subcontractor Pregualification	۹ 🗆	1111	TES-V10 Applicant - Oct. 13- check this out again	SUS-PRQ5	Received					Y			
E C Subcontractors	۹ 🗆	152365478		ZEMP0008						Y			
Tuesday Blues Construction	•	123	ZZ-Acme Supply	ZZ-ACME						Y			
new application	۹ 🗆	152635258	TRHI BUSINESS100	TRHI 100						Y			
TES-V10 Applicant - Oct. 13- checl	۹ 🗆	13371337	Terence US inc	UTER						Y			
- Applicants	• 🗆	123412341	Terence Test Vendor	TBR02						Υ			
Self Service	۹ 🗆	1212	Supreme Windows	SUPREME						Y			
Pregualfications Control	•	178293648	Summit Design	SUMMIT						Y			
Workflow Notification	4 □	12345	Sterling Investments	STERLING						Y			
🕀 🛄 Bid Management 🕀 🦳 Budget & Cost Management	۹ 🗆	15555	Standard Industrial Developers	STANDARD						Y			
Gite Management Geports	۹ 🗆	123789456	Sphere Controlling Business Partner	SPHERE						Y			
🕀 🦲 User-Defined Logs	۹ 🗆	123789456	SPH5	SPH5						Y			
E Canada	۹ 🗆	123789456	SPH4	SPH4						Y			
Subcontractor Reviews	• 🗆	123789456	SPH3	SPH3						Y			
new folder	۹ 🗆	123789456	SPH2	SPH2						Y			
	۹ 🗆	123789456	SPH1	SPH1						Y			
	•	102030405	Sheridan College Institute of Technology	SHERID10						Y			
	۹ 🗆	1523654781	SHELCO1 - Customer in RVHQ1001 AND rv1	SHELCO1						Y			
	4	111222333	Service Ontario	SERONT01						Y			

For date fields, the format for query entry is dd-mm-yy, dd/mm/yy, or dd-mmm-yyyy. The operators, such as "=", "<", ">", ">=", etc. can be included where appropriate. Also, users may use a wild card character such as "1%" to query a specific set of data.

Click the [Execute Query] button to run the query against the entered data.

Subcontractor Prequalification Applicants

Subcontractor Prec	qualification	DnB Rating Reset Self-Se	rvice Password Print Report Approve Subcontractor	Check Spelling Add Workflow Delete Applicant Save 🛛 🕻 🏠 🏠
⊈∃⊞ CMiC Field Menu		Appli	ication	
		Subcontractor	Prequalification	
Search Go	Code 148	Tax ID chi-109-109	Prequalification Status Received V	Insurance Approval
Project: Freshmart Office Building - Chicag	Company Chili Fence and Borders		Insurance Category	Approval Status
Communication Management	Also Known As		Aggregate Project	
Subcontractor Pregualification	Legal Name		Limit:	Single Project Limit:
E Subcontractors	Bareat Com		Joint Check	
🗄 🗁 Applicants	chil Projecto		CAP Approved	CAP Approved
- 136	Partner	<u>A</u>	Hest Region	Iroant
140	Street 172 Edgewalk Drive		Those Negron	
146	Suite		Last Approval Date	Renewal Date
- Self Service			Workflow Status Unsubmitted	Pregual Required V
- Subcontractor Rating Setup	City kirkheid		Master Subcon	tract Union 🗹
Prequalfications Control	State Ilinois 🗸	Zip 50416	Financial State	nent Open Shop
Bid Management	Country		OSHA 300A F	Form Sample Insurance Cert.
Budget & Cost Management	Contact Mr. Thomas		Bonding Reference Le	etter Additional Comments
🗉 🧀 Site Management	Phone 415-965-8965	Fax (415) 451-0856		
Reports	Phone 413-303-6303	100 (110) 101-9030		
🗄 🦲 User-Defined Logs	Toll Free	E-mail lori.gbson@cmic.ca		
H Security				
Subcontractor Reviews	Contract Contract Amount 0.00	Project His	story lotals	Langest Contract To Date 0.00
- new folder	Current Contract Amount 0.00	bill to Date 0.00	Remaining to be billed 0.00	Largest Contract to Date 0.00
	General Contacts User-Defined Fields Insuran	nce Safety Financial Financial	Surety Litigation Approvals Sul	omission Log Call Log Project History References *
		Header 1		
	Comments			
		Header 2		
	E-Mail			
		Compliance		
	Acknowledge that you have reviewed our Subcontractor code of	f conduct, that you accept its terms and will adhere	to its principles, and that you will report any su	spect violation of the code known to you.
		Cut and Paste the following URL to access the Supp	lier Code: https://cmic.ca/.	
	Acknowledgement Date	Ads	nowledge Date Forms 26-06-2019	
	ACK DATE ADE 10-06-2019		File Attachments 546	
			and a second line in a second line in a	

Applicant Log – Add Applicant initial screen

The [Add] button in the Applicants Log is provided to allow internal users to add applicants directly into the subcontractor prequalification process. Applicants also have the option (if allowed) to use the Self Service screen to manually add their own information to which an internal user would be able to update as required. This may also include a workflow process.

		Appli
		Subcontractor
Code	148	Tax ID chi-109-109
Company	Chili Fence and Borders	
Also Known As		
Legal Name		
Parent Corp.		
Ctrl Business Partner		A
Street	172 Edgewalk Drive	
Suite		
City	Kirkfield	
State	Illinois	Zip 50416
Country		
Contact	Mr. Thomas	
Phone	415-965-8965	Fax (415) 451-9856
Toll Free		E-mail

The left section of the header block allows for maintenance of the applicant information, such as code, tax ID, name, address, and other contact related information.

Prequalification Status	Received ~	Insurance Approval Leve	×
Insurance Category	\sim	Approval Status	
Aggregate Project Limit:		Single Project Limit	
Joint Check			
CAP Approved		CAP Approved	20 A
Host Region		Urgen	
Last Approval Date	20	Renewal Date	
Workflow Status	Unsubmitted	Prequal Required	Prequal Required
	Master Subco	ntract	Union 🗸
	Financial State	ement 🗌	Open Shop
	OSHA 300A	Form	Sample Insurance Cert.
	Bonding Reference	Letter	Additional Comments

The right side of the header section allows updates on the current status of the applicant, as well as the approval level, insurance category, limits, CAP information, workflow status, whether a default compliance code set in SC control is to be inserted/updated in all subcontracts/vouchers (applicable only when the applicant turns subcontractor vendor), whether they will require prequalification (only applicable once converted into a business partner), as well as checkboxes indicating which documents have been provided.

						Аррисацон								
-0				Su	bcont	ractor Prequalification								
Code	148		Tax ID	chi-109-109		Prequalification Status	Received	\sim	Insurance App	roval Level	\sim			
Company	Chili Fence a	nd Borders				Insurance Category	\sim		Appro	oval Status				\sim
Also Known As						Aggregate Project Limit:			Single Pro	oject Limit:				
Legal Name						Joint Check								
Parent Corp.						CAP Approved			CAF	Approved		0		
Ctrl Business Partner						Host Region				Urgent				
Street	172 Edgewal	lk Drive				Last Approval Date		20	Rer	newal Date		0		
Suite						Workflow Status	Unsubmitte	d	Prequa	I Required	Prequal Required	1	×	
City	Kirkfield							Master Subco	ontract 🗌				Union 🗸	
State	Illinois	~	Zip	50416				Financial State	ement 🗌				Open Shop	
Country								OSHA 300A	Form			Sample	e Insurance Cert.	
Country							Bo	onding Reference	Letter			Addi	tional Comments	
Contact	Mr. Thomas													
Phone	415-965-896	5	Fax	(415) 451-9856										

Completed applicant header section sample

Locations - Tab

								Proj	ect History	Totals								
		Cur	rent Contract An	ount 0.00		Bill	To Date 0.00				Remaining To Be Bi	led 0.00			Largest Contract	To Date	0.00	_
Locations	General	Contacts	User-Defin	ed Fields	Insurance	Safety	Financial	Financial	Surety	Litigation	Approvals	Submission Log	Call Log	Project History	References	Atta	chments	*
	Selected Reg	gions								Addre	:55						Action	^
ATLANTA	Atlanta, G	3A		Address	Code			Name									+ x	
AUS	Australia				Church									Dhana				
AUSTIN	Austin, T	x			Street									Phone				
CENTRAL	Central				Suite													
CHRLOTTE	Charlottes	sville Area			City									Fax				
CONNECT	Connectio	out			State		~	Zip						Toll Free				
DELAWARE	Delaware	•					1221											
DOC	District of	Columbia			Junu y													
EAST	East			Ci	ontact									E-mail				
FAIRFAX	Fairfax, V	/A															+	
IOWA	lowa																	
MAINE	Massach	usetts																
MADVD	Manuland	Paltimore																

The Locations tab allows the selection of one or more business partner territories (left section), as well as the entry of actual addresses (right section) as required. In both cases, multiple regions/addresses are permitted.

The selected regions data is maintained in the PM Forms Local Table - Business Partner Territories.

BUSIN	ESS PART	INER TERRI	TORY								P Save	Exit	(i) (?) (d	∆ D∕ ⊂ O
BUSINESS P	PARTNER TER	RITORIES												
View 👻	Y 🖪 Free	ze 📲 Detach	🔯 Search	nsert 🔄	Insert Multiple	Delete	\otimes_{\otimes} Workflows	Report Options	Export	ECM Documents	User Exte	ensions		
*	Code	Des	scription											
ATLANTA		Atlanta, GA												^
AUS		Australia												
AUSTIN		Austin, TX												
CENTRAL		Central												
CHRLOTT	E	Charlottesville Are	a											
CONNECT	r	Connecticut												
DELAWAR	RE	Delaware												
DOC		District of Columbia	ia											
EAST		East												
FAIRFAX		Fairfax, VA												
IOWA		Iowa												
MAINE		Massachusetts												
MARYB		Maryland - Baltimo	ore											
MARYW		Maryland - Wester	m											
NEBRASK	A	Nebraska												~

Business Partner Territories

General - Tab

								taus Tatala						
		Current C	ontract Amount 0.00		Bill To Date	0.00	Project his	tory rotais	Remaining To Be	Billed 0.00			Largest Contract To [ate 0.00
		content of			on roode	0100			remaining to be	uncu unu			La gest contact rol	
+ Locations	General	Contacts	User-Defined Fields	Insurance	Safety	Financial	Financ	ial Surety	Litigation	Approvals	Submission	Log Call	Log Project History	References
							License Ir	formation						
	4	Authority				lass			Licens	e Number			Date Expire	Action
N/A	~												20	+×
														+
			Trade Informatio	n							Certifying Ag	jencies		
			CSI Number				Action			MBES	Information			
01100 - Summar	ry						+ ×	Disability Own	ned Business Enter	orise 🗌 Mi	nority Owned Busin	ess Enterprise	Not Applicable	
							+	Other		Pr	ivately Owned Ente	rprise	Publicly Owned Enterpresenter	orise
								Small Busines	s Enterprise	U Ve	eteran Owned Busin	ess Enterprise	Woman Owned Busine	ess Enterprise
								Other Other						
											Certifying Agency	7		Action
								Disability Owner Business Agency						+×
														+
							Union Af	filiations						
			Name								Action			
														+

The General tab allows the maintenance of trade information, such as CSI numbers, certifying agencies, and license information of a subcontractor.

Trade Information

	Tra	de Information			
	CSI	Number		Act	ion
01100 - Summary		A		+>	۲.
	🍯 CSI I	LOV - Mozilla Firefox — D		Х	+
	(i) 🔒	https://v10xsandboxwls.cmicglobal.c •••• 🗵	☆	≡	
	Find: 9	Go Close Accept vrev Set 1 - 44 of 44 v Next Set >>			n Af
	Code	Name		^	
	01	General Requirements			
C	01100	Summary			
C	01200	Price and Payment Procedures			
C	01300	Administrative Requirements		~	

CSI Number

The CSI LOV is created from the PM JSP Local Files > CSI Maintenance.

		CSI Maintenance	
	CSI Group A	ll Groups 🔽 ┿ 🕲 🗙	
		CSI Group	
Select	Code	Name	Action
	01	General Requirements	User Extension
	01100	Summary	User Extension
	01200	Price and Payment Procedures	User Extension
	01300	Administrative Requirements	User Extension
	02050	Basic Ste Materials and Methods	User Extension
	02100	Site Remediation	Si X User Extension
	02200	Site Preparation	User Extension
	02300	Earthwork	User Extension
	02400	Tunneing, Boring and Jacking	User Extension
	02600	Drainage and Containment	User Extension
	02900	Panting	User Extension
	03050	Basic Concrete Materials and Methods	User Extension

PM JSP Local Tables - CSI Maintenance

Licenses Information

	Project History Totals														
		Current C	ontract Amount 0.00		Bill To Date 0	.00			Remaining To Be	Billed 0.00				Largest Contract To Da	ate 0.00
Locations	General	Contacts	User-Defined Fields	Insurance	Safety	Financial	Financial	Surety	Litigation	Approvals	Submission	Log	Call Log	Project History	References
							License Inform	nation							
		Authority			Cla	SS			Licens	e Number			Date	Expire	Action
Alabama	bama 🗸										+×				
															-

The License Information section allows entry of any relevant license information available. This includes specification of the authority which has issued the license as well as the expiry date.

Certifying Agencies

	Certifying Agencies		
	MBES Information		
Disability Owned Business Enterprise	Minority Owned Business Enterprise	Not Applicable	
Other	Privately Owned Enterprise	Publicly Owned Enterprise	
Small Business Enterprise	Veteran Owned Business Enterprise	Woman Owned Business Enterp	orise
Other Other			
	Certifying Agency		Action
Disability Owner Business Agency		A	+×
			-

This section allows tracking of MBE/DBE (minority/disadvantaged business enterprise) information including specification of the certifying agency.

The Certifying Agency LOV is self-maintained in this section. Entry of a value will prompt the user for saving on committing of the record. From that point forward, the LOV will include the value just saved.



Confirmation dialog when adding a new certifying agency for MBE/DBEs

User Defined Fields - Tab

				Projec	t History Totals						
	Current Contract Amount 0	.00	Bill To Date 0.0	0		Remaining	To Be Billed 0.00			Largest Contract To Da	te 0.00 ~
General Contacts	User-Defined Fields	Insurance	Safety Financ	al Financial	Surety	Litigation	Approvals	Submission Log	Call Log	Project History	References 🕈
			н	eader 1							
Common the											
Comment	S										
			н	eader 2							
E-Mai	il										
			Co	npliance							
Acknowledge that you have revie	ewed our Subcontractor c	ode of conduct, t	hat you accept its terms	and will adhere to	its principles, a	nd that you will	report any suspe	ct violation of the code	known to you.		
		Cut and Pas	te the following URL to	access the Supplie	r Code: https://c	mic.ca/.					
Acknowledgement Date	e 🖄			Acknov	vledge Date Form	26-06-2019	20				
ACK DATE ADF	10-06-2019 🖄				File Attachment	546					

The User Defined Field tab allows maintenance of any ad-hoc entries, if required.

Insurance - Tab

						Project	History Totals						
		Current Contract Amount 0	.00	Bill T	o Date 0.00			Remaining	To Be Billed 0.00			Largest Contract To Date	0.00 ~
🕈 General	Contacts	User-Defined Fields	Insurance	Safety	Financial	Financial	Surety	Litigation	Approvals	Submission Log	Call Log	Project History	References 🕈
Insurance	Broker Name:	Harde	r and Assc.							GL Expiration Date:		30-06-2020 🔯	
Meets Ins	urance Requireme	nts											
GL Limits	per occurence are	only \$1M with no Umbrella/	Excess Policy.										
Aggregate	e limits do not appl	y separately per project. (U	nless Aggregate + I	Umbrella Limits	are greater than	n \$5M)							
Additional	I Insured Endorsem	nent does not cover complet	ed operations.										
Mold Cove	erage in GL Policy o	or Separate Pollution Liability	y Coverage.										
Additional	l Insured Endorsem	nent does not include prima	y wording.										
Other													
Insurance Commer	nts:												
Surety Company													

The Insurance tab allows the recording of various items related to vendors insurance.

Safety - Tab

					Project His	tory Totals							
	Current Cor	ntract Amount 0.00		Bill To Date 0.00			Remaining T	o Be Bille	d 0.00			Largest Contract To Dat	e 0.00 Y
🕈 General 🕴 Co	ontacts User-De	fined Fields	Insurance Safe	ety Financial	Financial	Surety	Litigation	Appro	ovals Submissi	on Log	Call Log	Project History	References 🕈
Does your company ha	we a written field based :	safety program?	O _{Yes} (No No									
Does your company ha	ive a substance abuse po	licy?	Oyes (No No									
Do you hold site safety	meetings?		Oyes (No How Often?									
Do you conduct project	t site safety inspections?		O _{Yes} (No How Often?									
Who follows up on the	se Inspections?				ME								
Freeze Year	Year	Citations	EMR	RIR					FWH		ANE	Fatalities	Action
	2018	0	0	0	0		0.00		0		0	0	+×
													+

Under the Safety tab, maintenance of safety related information is completed by checking the appropriate status values and entry of standard safety related values by year, such as safety citations received, fatalities in the year, and other values including:

- EMR Experience Modification Rate: The rate is based on two major issues, the number of claims and the cost of each claim. In essence, subcontractors whose unsafe acts result in injury have a higher EMR than subcontractors who actively practice safety and mitigate claims.
- RIR Recordable Injury Rate: The incidence rate can be computed for all recordable cases of injuries and illnesses using the following formula: Total number of injuries and illnesses (N) ÷ number of hours worked by all employees (EH) x 200,000 hours = total recordable case rate. The 200,000 figure in the formula represents the number of hours 100 employees working 40 hours per week, 50 weeks per year would work and provides the standard base for calculating incidence rates.
- LTIR Lost Time Injury Rate: This is calculated in the same way as the recordable injury rate, but instead of counting the total number of injuries and illnesses, the count would be for number of injuries and/or illnesses resulting in lost workdays.
- FWH Total hours worked for all employees.
- ANE Annualized average number of employees for the specified year.

The Incident Rate (IR) field is calculated: (RIR + LTIR) \times 200000/FWH

To record additional years, click the add icon (\ddagger) .

Financial - Tab

			Project	History Total	5					
Current Contract	Amount 0.00	Bill To Date	0.00		Remaining	To Be Billed 0.00			Largest Contract To Dat	te 0.00
General Contacts User-Defined	Fields Insurance	Safety Fir	nancial Financial	Surety	Litigation	Approvals	Submission Log	Call Log	Project History	References
Year Endir	g 2018 🗸 🕂 🗙									·
Highest Dollar Amou	nt 1.00)				Average Project	Size 1	1.00		
Legal Entity Typ	e Corporations	\sim				Current As	sets 0	0.00		
Year Company Found	d 2019					Total As	sets 0	0.00		
Fiscal Year End Da	a Jan 🗸 1 🗸					Average Receiva	bles 0	0.00		
Amount Line Of Cree	lit 1.00					Current Liabil	ties 0	0.00		
Against Line Of Cree	lit 1.00					Total Liabil	ties 0	0.00		
D&B Numb	er					Net Ec	uity	0.00		
D&B Paydex 1	lo					Current Year Reven	ues 0	0.00		
Any Previous companie	7 View Companies					Net Inco	ome C	0.00		
Any Subsidiarie	7 View Subsidiaries					Current Backlog a To	s of day	0.00		
Parent Organizatio	n					Average Monthly Bi	ling	0.00		
O Yes No Has Your Firm Ever Filed Bankrupto	R									

The Financial tab will allow entry for the current and past years financial information that may have an impact on qualification for the contractor.

Legal Entity Type

The legal entity types are selectable as specified in the AP Setup screen for AP business partners.

Year Ending

The + displays a pop-up window:

🧕 Add Financial Year - M.	. –			×							
 test4v10.cmic.ca:7785/ · · · · ☑ ☆ 											
Add Financial Year											
New Financial Year	2019										
Copy Previous Year's Data	\checkmark										
		Ok		ancel							

This allows for keeping of more than a single year of financial information related to the vendor. The 'Copy Previous Year's Data' checkbox can be used to simplify updates to the newly added year where most of the information is the same.

The financial year record can be deleted by clicking the \times beside the chosen year.

View Companies

Against Line Of Credit	1.00			Total	Liabilities
D&B Number		Previous Company - Mozilla Firefox		×	et Equity
D&B Paydex No		(j) test4v10.cmic.ca:7785/cmictestv10x/PmScPrequ •••	⊠ ☆	≡	tevenues
Any Previous companies?	View Companies	Save An	d Close	Close	t Income
Any Subsidiaries?	View Subsidiaries				log as of
		Company Name		Action	Today
Parent Organization					ily Billing
○Yes ● No Has Your Firm Ever Filed Bankruptcy?				T^+	
Accountant				Financia	al Format
	View Financial Contacts				

The View Companies link allows the tracking of other company names that may be related to the applicant.

View Subsidiaries

Against Line Of Credit	1.00	Subsidiaries - Mozilla Firefox -		×	Liabilities
D&B Paydex No		(i) test4v10.cmic.ca:7785/cmictestv10x/PmScPrequ •••	ା ଅ	= 1	.evenues
Any Previous companies?	View Companies	Save Ar	d Close	Close	: Income
Any Subsidiaries?	View Subsidiaries				log as of
		Subsidiary Name		Action	Today
Parent Organization				+×	ily Billing
○Yes ●No Has Your Firm Ever Filed Bankruptcy?				+	•
Accountant				Financ	ial Format
	View Financial Contacts				

The View Subsidiaries link allows the tracking of other subsidiary names that may be related to the applicant.

View Financial Contacts – Link

 General Contacts User-Defined F 	ields Insurance	Safety Financial	Financial	Surety Liti	gation Ap	provals	Subm
Fiscal Year End Date	Jan 🗸 1 🗸	Financial Contacts -	Mozilla Firefox		-		×
Amount Line Of Credit	1.00	i) test4v10.cmic.ca	a:7785/cmictes	stv10x/PmScPregua	al/Show ••• (= 1
D&B Number	1.00				Save And	Close Cl	ose
D&B Paydex No		Financial Cont	tact Kevin Muilson				
Any Previous companies?	View Companies	т	itle CEO				_
Any Subsidiaries?	View Subsidiaries	Pho	one 415-965-8965	;			
Parent Organization		F	Fax				-
O Yes ● No Has Your Firm Ever Filed Bankruptcy? Accountant		E-m	nail kevin@mail.co	om 			_
Accountant	View Financial Contacts	Steve	Name	manager	e		on iev
Financial Comment							+

The Financial Contacts link allows specification of name and titles related to the company officers for this applicant. Additional officer names and titles are added by using the Add icon (+).

View Bank Information – Link

Defined	Fields Insurance	Safety Financial	Financial	Surety	Í	Litigation	Approvals	Submission Log	Call Log	Pro
r End Da	Einancial Contacts - Mo	zilla Firefox		_		×	Average Receivab	les	0.00	
e Of Cre		Lind Therein			_		Current Liabili	ties	0.00	
e Of Cre	i test4v10.cmic.ca:77	785/cmictestv10x/Pm	ScPrequal/Sho	ow ••• 🖻	و ک ر	≣	Total Liabili	lies	0.00	
B Numb				Save And C	lose	Close	Net Eq	uity	0.00	
Paydex	Daale Name	Die Daels Crare				_	Current Year Reven	ues	0.00	
ompanie	валк мате	Big Bank Guys					Net Inco	me	0.00	
heidiarie	Bank Contact	Shiely Zen					Current Backlog a	s of	0.00	
JSIGIALIE	Bank Title					_	То	day		
ganizati	Bank Phone	415-965-8965					Average Monthly Bil	ing	0.00	
ankrupte	Bank Fax									
Accounta	Bank E-mail						Financial For	nat		
				-				View Bank Informa	tion	

This allows for the recording of the applicant's primary bank information, including the contact at the bank and their title and contact information.

Surety - Tab

			Project Hi	istory Totals						
Current Contract Amount	0.00	Bill To Date 0.00	Remaining To Be Billed 0.00						Largest Contract To D	ate 0.00 ~
General Contacts User-Defined Fields	Insurance Sa	ety Financial	Financial	Surety	Litigation	Approval	Is Submission Lo	g Call Lo	g Project History	References →
Is your Company Bondable?										
Surety Company							\$ 0 - \$ 100 K	.00%		
Broker Name							\$ 100 K - \$ 500 K	.00%		
Phone							\$ 500 K - \$ 1 M	.00%		
Single Project Bonding Capacity	0.0	0					\$1 M - \$2 M	.00%		
Aggregate Project Bonding Capacity	0.0	0					\$ 2 M - \$ 5 M	.00%		
Current amount under bond today	0.0	0								
Surety Status	Approved 🗸									
Surety Comments										.1

The Surety tab allows for the entry of bond information for the applicant.

Litigation - Tab

		Project History Totals				
Current Contract Amount 0.00	Bill To Date 0.00	Remaining	Remaining To Be Billed 0.00			
General Contacts User-Defined Fields Insurance	Safety Financial	Financial Surety Litigation	Approvals Submission Log	Call Log Project History References 🕈		
Any current litigation with Owners or General Contractors?	⊖ Yes ● No					
Any judgements against in the last 3 years?	⊖ Yes ● No					
Any Principals of your company in litigation?	⊖Yes ● No					
Any paid liquidated damages?	⊖ Yes ● No					
Any labor law violations?	⊖ Yes ● No					
Have you ever defaulted on a contract?	⊖ Yes ● No					
Ever failed to complete a contract?	⊖ Yes ● No					
Have you ever been terminated from a contract?	O Yes No					
Have you ever had your license revoked or suspended?	⊖ Yes ● No					
Litigation Status Approved						
Litigation Comments				j.		

The Litigation tab allows entry of any litigation data for the applicant as well as specification of approved, not approved, or need more info options for the applicant.

Approvals - Tab

				Project His	tory Totals						
	Current Contract Amount 0.	00	Bill To Date 0.0	0	Rei	naining To Be	Billed 0.00		Largest Contract To Date 0.00		
General Contacts	User-Defined Fields	Insurance	Safety Finance	ial Financial	Surety Litig	ation 🚺 A	Approvals Submission Log	Call Log	Project History	References 🕈	
Year Ending AL	L 🗸										
Year Ending Orde	er Approver Name	Approval Type	Date Submitted	Date Received	Action			Comments		Action	
	A	Insurance 🖌	1 to the second s							. +×	
		Insurance								+	
		Safety		Workflo	w Progress						
Acti	ion	Financial	tole	le Date User Notes							
		Regional		No Rec	ords Found						
		CAP Assigned									

The Approvals tab allows for the maintenance of the approvals the vendor has received regarding various items, such as insurance, safety, financial, regional, or CAP assigned including the year and who has made the approval.

NOTE: The Date, Action, and Comments fields are display only and will be populated only when approvals are done via a workflow.

Submission Log - Tab

 Project History Totals

 Current Contract Amount 0.00
 Bill To Date 0.00
 Remaining To Be Billed 0.00
 Largest Contract To Date 0.00
 V

 General
 Contacts
 User-Defined Fields
 Insurance
 Safety
 Financial
 Surety
 Litigation
 Approvals
 Submission Log
 Call Log
 Project History
 References

 Transmit No.
 Date Sent
 Sent Via
 Prequel Type
 Sent To
 Date Received
 CC
 Submission Detail
 Action

The Submissions Log tab is a display only type of log, showing information regarding reports that have been generated from the Applicant/Subcontractor Prequalification screen, as well as information from any prequalification process workflows.

Call Log - Tab

	Project History Totals																
Current Contract Amount 0.00 Bill To Date 0.00									Remaining T	o Be Billed 0.00			Larg	est Contract To Dat	e 0.00	~	
 General 	Contacts	User-Defined Fields	Insu	irance	Safety	Financial	Financia	al Š	urety	Litigation	Approvals	Submission Log	Call Lo	og Pl	roject History	Refere	ences 🕈
Call No.		Contact Name:		PI	hone	Call Da	te		Call			Notes		Call Back	Call Back D	ate	Action
							20	Aaron Be	eckam				.::			20	+×
																	- +

The Call Log tab allows the entry of any calls made related to the applicant. Optionally, a call back date can also be added as a manual reminder to call them back.

Project History - Tab

Project History Totals											
Current Contract Amount	Remaining To Be Billed 0.00 Largest Contract To Date 0.0					0.00 V					
General Contacts User-Defined Fields	Safety Financial	Financial	Surety Litigati	on Approvals	Submission Log	Call Log	Proj	ect History	References 🕈		
Company Code Project Code Project	lame Contract C	Code Contract Type	Cu	rrent Contract Amount	Bill To Date	Remaining To Be I	Billed	Rating	Contract Date	Action	
	No Records Found										
Total (0 rows)											

The Project History tab displays all the project information for the subcontractor vendor (applicable only when the applicant becomes a subcontractor).

References - Tab

							Project Histo	ry Totals						
		Current Contract Amo	ount 0.00		Bill To Date	0.00		Rer	naining To Be Billed 0.00			Largest Contract	: To Date 0.0	a ~
:8	User-Defined Fields	Insurance	Safety	Financial	Financial	Surety	Litigation	Approvals	Submission Log	Call Log	Project History	References	Attachm	ents 🖌 🖣
							References							Action
Co	ompany Name:								Contact Name:					
	Street								E-mail					+×
	City						State		Zip		Phone			
														+

One or more references can be entered using the References tab.

Attachments - Tab

Project History Totals										
Current Contract Amount 0.00	Bill To Date 0.00	Remaining To Be Billed 0.00	Largest Contract To Date 0.00							
User-Defined Fields Insurance Safety	Financial Financial Surety Litigation Appr	ovals Submission Log Call Log Project History	References Attachme	nts 🖌 🔸						
Type	Number	Rev. Number	Attachment	Action						
	A		+-							
				+						

Existing attachments from any project can be selected for the applicant. Additionally, new documents can be added using the **[Upload New]** button in the title bar when in the Add Attachments section.

									Save	Save & New	Close
				Add At	tachment	\checkmark					
Number	00000646			Title							
Document Folder Select											
From Contact				To Contact							
Copies				Status	Open 🗸						
Acknowledgement Date				Area Company				Project type			
Doctype				Attach. Type				Reviewer Name			
				Revision	Info						
SB - Designer Ref.	Revision Date	Receiv	ved Date	Status	Desc	ription	URL	Attachment			
21	-08-2019 🖄	21-08-2	019 🖄	Open ~	Original Version			Browse No file selec	ted.		

	Upload Multiple		
[Browse No files selected.		
	Upload File List		Upload Status
	Filename	Size	In progress
	Drawings.pdf	1311 KB	Successful
or drop files here	Details.xlsx	5 KB	Failed
Number of Files: 2		1316 KB	
Note: Maximum upload file s	ize for each file is 20MB . If file size exceeds 20MB, file will be hightlighted in R ote: Remove unnecessary files before uploading.	ED Upload Re	emove Cancel

New documents may also be added using the [**Upload Multiple**] button in the title bar when on the Add Attachments section. This allows users to upload multiple documents at once.

Additional Information Options

The following buttons are available on the top of the screen to perform the following specific actions

[DnB Rating] - Button

The Dunn & Bradstreet rating information, if available, may be entered/edited related to an applicant.

				Save And Clo	ose Close
	Du	unn & Bradstreet	Rating		
12 Month D&B Paydex:			Stress Sc	core	
DnB Credit Appraisal:	No Rating 🖂		Credit Score Percer	ntile	
Financial Stress Class					
Ratings					
DnB Composite Credit Appraisal		No Rating	🔘 Fair	◯ Good	🔘 High
DnB Paydex (if applicable)	0 - 40	0 41 - 50	0 51 - 65	0 66 - 80	○ > 80
Financial Stress Class	0 5	O 4	Оз	O 2	01
Stress Score	O 1001 - 1100	O 1101 - 1200	O 1201 - 1400	O 1401 - 1500	○ > 1501
Credit Score Percentile	0 - 20	O 21 - 40	0 41 - 60	0 61 - 80	○ > 81

[Reset Self-Service Password] - Button

If an applicant is permitted to use the self service functionality to enter/update their information, this popup window may be used to set/reset the password and notify the applicant via an email. This is useful to reset the password for an applicant that may have forgotten/lost their existing password.

	Reset Self-Service Password Cancel
To Email	lori.gibson@cmic.ca
Predefined Subjects	Manual Renewal Notification E-Mail Subject
Subject	Prequalification Renewal
Body	Dear Subcontractor:
	Below is a link to the prequalification screen and a new password has been generated for you.
	Should you have any questions or you require assistance, please contact the Prequalification Department.
	Sincerely,
	Prequalification Department
	Use password ' <ss_password>' - and use the following link to enter your data: <ss_url></ss_url></ss_password>
** This will reset the Self-Service in the e-mail.	password for the current Partner. The password and link information will automatically be included

[Print Report] - Button

This is a standard CMiC Print Reports pop-up window which allows the user to select and print the available reports.

[Approve Subcontractor] - Button

When an applicant is pre-qualified to be a business partner, use this approve screen to enter the business partner code and abbreviation and approve. Once approved, from this time forward, the applicant will only be available under the Subcontractor Log. The applicant is now recognized as a business partner in CMiC.

		Approve	Cancel
	Approve Subco	ntractor	
Old Partner Code:	148		
New Partner Code:	BP148		
New Partner Abbreviation	BP148		

[Check Spelling] - Button

The standard check spelling functionality is available for use, as required.

				Application	
			Subco	ontractor Prequalifi	cation
Code	148	Tax ID	nter - Mozilla F	- 0	× Received
Company	Chili Fence and Borders aplicant				· 🗸
Also Known As			(i) test4v10.cmic.ca:7785/	'cr ••• 🕑 🏠	=
Legal Name					^:□
Parent Corp.			Not Found	-	
Ctrl Business Partner			Replace With	Replace	
Street	172 Edgewalk Drive		applicant	Tapore	
Cuito			Suggestions	Ignore All	Unsubmitted
Suite				Learn	s onsubmitted
City	Kirkfield		applicant		_
State	Illinois ~	Zip	pliant	Finish	
Country			appliance ~		Ben
Contact	Mr. Thomas				V
Phone	415-965-8965	Fay	(415) 451-9856		

[Add] - Button

This button allows the user to start entering a new applicant into the Subcontractor Prequalification module.

[Delete Applicant] - Button

An applicant may be deleted, and the user will be required to confirm before deleting from the system.

							Application			
						Subcontra	actor Prequalifica	ation		
Code	148		Tax ID	chi-109-109			Prequalification	Status	Received	
Company	Chili Fence and Borders						Insurance C	ategory	\checkmark	
Also Known As							Aggregate Project	t Limit:		
Legal Name							Join	t Check		
Parent Corp.								roved		
Ctrl Business Partner								tegion		
Street	172 Edgewalk Drive		I his will dele	te the applica	ant. Are you su	ire you wisr	to continue?	I Date		2
Suite								Status L	Jnsubmitted	i
City	Kirkfield									Master
State	Illinois	~			0	K	Cancel			Financia
Country						_				OSHA
country									Во	nding Refe
Contact	Mr. Thomas									
Phone	415-965-8965		Fax	(415) 451-98	56					
🕈 General 🛛 Co	ontacts User-De	fined Fields	Insurance	Safety	Financial	Financia	Surety	Litig	jation	Appr

[Save] - Button

The standard commit function processes when a new entry is made or updates are performed for an existing applicant.

Subcontractor Prequalification - Screen

Sub	ocontractor Pred	qualificat	ion							DnB Ratin	g Reset Self-Se	rvice Password Print	Report Check Speling	Workflow Save	12 🗈 🍙
\$ E E	CMiC Field Menu							Subcontr	actor Prequalificat	ion					^
Search	60	Code	A1GARDEN		Tax	ID 85266655	5		Prequalification S	Status Review Con	nplete 🗸	Insurance Approval Lev	el A 🗸		
		Company	A1GARDEN Sul	bcontractor Vendor					Insurance Cate	egory IV 🗸		Approval State	us Subs Are Approved		~
E Proje	ommunication Management	Also Known As	GARDEN-A1						Aggregate Project I	Limit: 100,000,000	.00	Single Project Limi	it: 10,000,000.00		
🕀 🦲 D	ocument Management	Legal Name	A1GARDEN Ser	rvices Incorporated					Joint 0	Check 🔽					
E C S	ubcontractor Prequalification	Parent Corp.							CAP App	roved 🗹		CAP Approve	ad 09-09-2014 🛛 🔯		
	Tuesday Blues Construction	Ctrl Business Partner	A1 CEMENT IN	IDUSTRIESBP NAME					Host R	egion		Urge	nt 🔲		
	new application Gracious Living	Street	100, Garden St	treet					Last Approval	Date 24-03-201	5 🖄	Renewal Da	te 24-03-2016 🕅		
	TES-V10 Applicant - Oct. 13- che	Suite	Suite 500 Floor	r V					Workflow S	Status Rejected		Prequal Require	ed Prequal Required	\sim	
	Wellington Power Corp	City	Chicago								Master Subcon	tract 🗹		Un	ion 🗌
	A1WORKS INC A1GARDEN Subcontractor Vendor	State	Illinois	\sim		Zip 55555					Financial Stater	ment 🔽		Open SI	op 🗹
• <u>•</u>	Applicants	Country	US							Bor	OSHA 300A F	etter		Sample Insurance Co Additional Comme	ert.
	Self Service Subcontractor Rating Setup	Contact	Mr.GARDENER							001	ing reference o			riddicional comme	
-0	Prequalfications Control	Phone	(111) 222-333	3		Fax (111) 222-	-3334								
	Workflow Notification						-	124	7				7	7	×
E 🔁 B	udget & Cost Management	🕈 General 🛛 Us	er-Defined Fi	ields Insurance	Safety	Financial	Financial	Surety	Litigation	Approvals	Submission	Log Call Log	Project History	References	Contacts 🕈
-0	Subcontract						Head	er 1							
	Subcontract Change Orders Subcontractor SOV			User Defined Information											
	CMIC BIM 360		Comments												
	Potential Change Items														
	Change Orders														
	Change Transmittai						Head	er 2							
	Compliance Status Log		E-Mail	a1garden@unicodemail.											
	Expense Authorization						Compli	3000							
	Cost Status Query						compi								
	Budget Status Query (Revenue)	Acknowledge that y	ou nave reviev	wed our Subcontractor co	de of conduct,	r, that you acco	ept its terms and	will adhere	to its principles, an	id that you will re	port any suspec	t violation of the code	e known to you.		
	Cost Status Query (Category)				Cut and Pa	aste the follow	ving URL to acce	ess the Suppl	ier Code: https://cm	iic.ca/.					
	Budget Status Query (Category)	Acknowle	edgement Date	20				Adkn	owledge Date Forms		20				
	Contract Enracasting with PCI Projectic	A	K DATE ADF	B					File Attachments	25					
	PCI Markup Rules														
	Coharanteer Transline I an														
<	>														

Selecting a partner from the Subcontractors Log opens the detail in the main context window. The information in this main context window is divided into an upper section with header information and lower section of detailed information, broken up into tabs. These sections are scrollable to display more detail.

The subcontractor and contact information, such as address, phone, fax, and email, etc. are displayed on the left side of the upper section. On the right, information, such as status, project limit amounts, and approval/renewal dates are displayed.

Sub	ocontractor Pred	qualification							DnB Rating Re	set Self-	Service Password	l Print Rej	port Check Spe	eling Workflow Save	2 🖬 🍙
\$ E E	CMIC Field Menu					Sul	contra	actor Prequalification							^
Search	Go	Code A1GARDEN		Tax ID	852666555			Prequalification Status	Review Complete	~	Insurance Appro	oval Level	A 🛩		
		Company A1GARDEN Su	bcontractor Vendor					Insurance Category			Approv	val Status	Subs Are Approv	ved	~
E D Proj	ect: Freshmart Office Building - Chica	Also Known As GARDEN-A1						Aggregate Project Limit:	Pending		Single Proj	ect Limit:	10,000,000.00		
	locument Management	Legal Name A1GARDEN Se	rvices Incorporated					Joint Check	Submitted						
📄 🔁 S	ubcontractor Prequalification	Devent Gum						CAR Approved	Received		CAR	Approved	00-00-2014	62	
₽€) Subcontractors	Parent Corp.		101				Chi Approved	Sent For Review		0.1	Approved	09 09 2014	-0	
	Tuesday Blues Construction	Ctrl Business Partner A1 CEMENT IN	IDUSTRIESBP NAME					Host Region	Review Complete			Urgent			
	Gracious Living	Street 100, Garden S	treet					Last Approval Date	On Hold Missing D	ata	Rene	ewal Date	24-03-2016	20	
	TES-V10 Applicant - Oct. 13- che	Suite Suite 500 Floo	r V					Workflow Status	Non-Responsive		Prequal	Required	Prequal Required	d ~	
		City Chicago							Update Prequal		ontract 🗹			U	Jnion
	A1WORKS INC	State Illinois	×	Zin	55555				Workflow Rejecte	d	ement 🔽			Open 5	Shop 🗹
-	A IGARDEN Subcontractor vendor								05	GHA 300/	A Form 🗹			Sample Insurance	Cert.
	Self Service	Country US							Bonding R	eference	Letter			Additional Comm	nents
	Subcontractor Rating Setup	Contact Mr.GARDENER													
	Prequalfications Control	Phone (111) 222-333	3	Fax	(111) 222-33	334									
L-1	Workflow Notification	T-0		· · · · · · · ·			E								~
	lid Management	 General User-Defined F 	elds Insurance	Safety F	inancial	Financial Su	rety	Litigation Ar	provals Sul	bmissio	n Log 🕺 Cal	Log	Project Histo	References	Contacts >
	Subcontract					Header 1									
	Subcontract Change Orders		User Defined Information												
-0	Subcontractor SOV		ober bernied Brorniddon												
-0	CMIC BIM 360	Comments													
-0	Potential Change Items														
-0	Change Orders														
	Change Transmittal														
-0	Request For Payment		-			neader 2									
	Compliance Status Log	E-Mail	a1garden@unicodemail.												
	Expense Authorization					Compliance									
	Cost Status Query	Acknowledge that you have review	wed our Subcontractor cod	de of conduct, th	at you accep	t its terms and will a	dhere	to its principles, and tha	t you will report a	ny susp	ect violation of th	he code kr	nown to you.		
	Dudget Status Query (Revenue)			Cut and Paste	the followin	a URL to access the	Suppli	ier Code: https://cmic.ca							
	Budget Status Query (Category)		65			.g									
	PCI Projection	Acknowledgement Date	ĽO				Ackno	owledge Date Forms 1	20						
	Contract Forecasting with PCI Projectic	ACK DATE ADF	20					File Attachments 25							
	PCI Markup Rules														
1	Cohandrastar Tracking Law														

The prequalification status may be selected from the drop-down list for a specific subcontractor. This prequalification status may be used to run workflows, as well as reports and queries.

Sul	ocontractor Pre	qualification							DnB Ratin) Reset Self-S	Service Password	I Print Repor	t Check Spelin	ng Workflow Save	12 🗈 🍙
\$ E E	CMiC Field Menu						Subcontr	actor Prequalificati	ion						^
Search	Go	Code A1GARDEN		Tax ID	852666555			Prequalification S	tatus Review Com	plete 🗸	Insurance Appro	oval Level A	\sim		
		Company A1GARDEN Su	bcontractor Vendor					Insurance Cate	egory IV 🗸		Approv	val Status Su	ibs Are Approved	l.	\sim
E Pro	ect: Freshmart Office Building - Chica	Also Known As GARDEN-A1						Aggregate Project L	imit: 100,000,000.	00	Single Proj	ject Limit: 5	fety CAP and/or	Insurance Deficiencies	
	Document Management	Legal Name A1GARDEN Se	rvices Incorporated					Joint C	theck 🔽			S	ibs Are Approved		
📄 e 🤂 s	Subcontractor Prequalification	Decemb Core						CAP Appr	mad II		CAP	Approved	equal Date is Bla	nk or > 365 Days Old	
B	Subcontractors	Parent Corp.						Cri rippi			0.	N	eds Managemen	t Committee Sign-off	
	Tuesday Blues Construction	Ctrl Business Partner A1 CEMENT IN	DUSTRIESBP NAME					Host R	rgion			Urgent	gional Hold - Re	ad Comments for Expla	nation
	Gracious Living	Street 100, Garden S	treet					Last Approval	Date 24-03-2015	20	Reni	ewal Date Si	gn Off Required I	by RM & CFO	
	TES-V10 Applicant - Oct. 13- che	Suite Suite 500 Floo	r V					Workflow S	tatus Rejected		Prequal	Required			
	Wellington Power Corp	City Chicago								Master Subco	ontract 🗹			Un	ion 🗌
	A1WORKS INC	State Ilinois	~	Zip	55555					Financial Stat	ement 🗹			Open Sh	nop 🗹
	Applicants	Country US								OSHA 300A	Form 🗹			Sample Insurance Ce	ert. 🗌
T-0	Self Service	Country 05							Bon	ding Reference	Letter			Additional Comme	nts
	Subcontractor Rating Setup	Contact Mr.GARDENER													
	Prequalfications Control	Phone (111) 222-333	3	Fax	(111) 222-3334	4									
-	Workflow Notification						1.2								~
	aid Management	General User-Defined F	elds Insurance Sa	fety Fir	nancial	Financial	Surety	Litigation	Approvals	Submission	n Log 👘 Cal	I Log P	roject History	References	Contacts 🕈
	Subcontract					Header									
6	Subcontract Change Orders		User Defined Information												
-	Subcontractor SOV		oser bernied phormadon												
-	CMIC BIM 360	Comments													
-0	Potential Change Items														
-0	Change Orders														
-0	Change Transmittal					Header									
-0	Request For Payment		_			neader 2	-								
-	Compliance Status Log	E-Mail	a1garden@unicodemail.												
	Expense Authorization					Complian	ce								
	Budget Status Query	Acknowledge that you have review	ved our Subcontractor code of	conduct, that	t you accept it	ts terms and wi	ill adhere	to its principles, an	d that you will rep	ort any suspe	ct violation of th	he code knov	/n to you.		
	Cost Status Query (Category)		Ci	it and Paste t	the following	URL to access	the Suppl	ier Code: https://cm	ic.ca/.						
-	Budget Status Query (Category)	A desculadesment Date	10				Asker	uuladaa Data Forma		50.					
-	PCI Projection	Acknowledgement bate	00				ALMI	wieuge bate Forms		-0					
	Contract Forecasting with PCI Projectic	ACK DATE ADF	20					File Attachments	25						
-	PCI Markup Rules														
<	Cubasetester Traching Las														

Subcontractors may be categorized by assigning an appropriate approval status. These approval statuses are color-coded for easy identification or a quick review. Also, users may use these color-coded statuses for their own ranking system.

Subc	ontractor Prec	qualificat	ion							DnB Rating Reset	Self-Service Passw	ord Print R	eport Check Speling	Workflow Save	12 🖬 🍙
\$ - •	CMiC Field Menu							Subcontr	actor Prequalification						^
Search	Go	Code	A1GARDEN		Tax II	852666555			Prequalification Status	Review Complete	V Insurance A	oproval Level	A ~		
	_	Company	A1GARDEN Subco	ontractor Vendor					Insurance Category	N V	Ap	proval Status	Subs Are Approved		~
E Project:	Freshmart Office Building - Chica	Also Known As	GARDEN-A1						Appreciate Project Limit:	100.000.000.00	Single F	Project Limit:	10.000.000.00	-	
E Comm	nunication Management	Land Name	ALCADOFN Card	Terreneted					loint Chark						
E C Subco	ontractor Prequalification	Legar Name	AIGARDEN SEIVE	ces incorporated					Some check						
🖻 🤭 Su	bcontractors	Parent Corp.							CAP Approved			AP Approved	09-09-2014 20		
	Tuesday Blues Construction	Ctrl Business Partner	A1 CEMENT INDU	JSTRIESBP NAME					Host Region			Urgent			
	new application	Street	100, Garden Stre	et					Last Approval Date	24-03-2015 🔯	F	enewal Date	24-03-2016 🔯		
	TES-V10 Applicant - Oct. 13- che	Suite	Suite 500 Floor V	/					Workflow Status	Rejected	Preq	ual Required	Prequal Required	~	
	Wellington Power Corp	ON	Chicago							Master	Subcontract 🔽			Uni	
	A1WORKS INC	(int)	Minute	100		-				Financia	I Statement 🔽			Open Sh	
	A1GARDEN Subcontractor Vendor	State	alinois	~	2	ccccc di				OSH/	300A Form 🖌			Sample Insurance Ce	rt. 🗌
AP	If Senice	Country	US							Bonding Refe	rence Letter 📃			Additional Comme	ts
	bcontractor Rating Setup	Contact	Mr.GARDENER												
- Pr	equalfications Control	Phone	(111) 222-3333		Fa	ax (111) 222-	3334								
W	orkflow Notification							1							~
Bid M	anagement	🕈 General 🛛 Us	er-Defined Fiek	ds Insurance	Safety	Financial	Financial	Surety	Litigation A	pprovals Subn	ission Log	Call Log	Project History	References	Contacts >
	bcontract						Heade	er 1							
- 🔂 Su	bcontract Change Orders		114	ser Defined Information											
- 🔁 Su	bcontractor SOV														
	AiC BIM 360		Comments												
- Po	Itential Change Items														
- Ch	lange Orders						4								
	auge transmittal						Heade	er 2							
- 🔂 Co	impliance Status Log		E-Mail a1	1garden@unicodemail.											
- 🦲 Ex	pense Authorization						Compli	ance							
- 🔁 Co	ist Status Query	Acknowledge that vo	u have reviewe	d our Subcontractor co	de of conduct t	that you acce	nt its terms and	will adhere	to its principles and the	at you will report any	suspect violation o	f the code l	mown to you		
- 🛄 Bu	idget Status Query (Revenue)	ricknowledge that ye	a nave rememe	a our subconductor co	Cut and Das	to the follow	ing UDL to core	will duriere	io la principies, una un	at you will report any	suspect violation c	a ule code i	diowii to you.		
	ist Status Query (Category)			¢h.	Cut anu Pas	ae the follow	ing one to acce	ss ure Suppr	er code. naps.//cinic.ca	a.					
- 0 PC	2 Projection	Acknowle	dgement Date	ĽO				Ackno	wledge Date Forms	ĽO					
- 🔂 Co	intract Forecasting with PCI Projectic	AC	X DATE ADF	20					File Attachments 25						
- PC	CI Markup Rules														
<	handrader Traching I an														

This main screen may be used to set aggregate and single project limits for a subcontractor.

Single project limit may be maintained to set the highest estimated cost of a single project that an applicant is capable of undertaking at any given point of time, whereas aggregate project limit may be used to set the highest estimated cost of all the projects that the applicant is capable of undertaking concurrently.

хР	Subcontract	Entry							Us	er Extens	ions Copy	From Add E	Edit Post	Delete	Print Compliar	nce Select Bid Iter	ns Select PCIs	Back To Log	
									Subcon	tract									
	Vendor	A1GARDEN Sub	contractor Vendor						Con	tact Gard	len Doctor				Date	e 10-Sep-2014			
	Contract No.	CCC-A1GARDE-	140910-8					1	Contract T	ype					Post Date	•			
	Description	Subcontract for	Pre-Qualification V	endor											Status	Pending			
	Invoiced	Via - Subcontrac	st i i i i i i i i i i i i i i i i i i i						Curre	ncy US D	ollars				Bank Account	t 1000.100			
	Address							Corr	resp. Addr	ess					Bid Amoun	t			
	Default Retainage %	8						1	Default Ta	xes 🗹									
Allow	Only Single Job, CO Per RFP						SOV	Level Retai	inage Rele	ase 🗹									
	Start Date	01-Jan-2014							End C	Date 31-D	ec-2018				Issued Date	01-Oct-2014			
	Received Date	30-Sep-2014						E	Executed [Date 01-0	ct-2014				Rating	Rate It			
	Pay When Paid	✓							D	ays 0					Complian	t 🗆			
	Check Hdl						Calci	ulate Tax O	On Net Am	ount 🗆					CD	I 🗆			
	Single Project Limit	10,000,000.00	-	_			S	ingle Proj Li	.imit Remair	ning 9,69	5,000.00	-							
	Aggregate Project Limit	100,000,000.00	-	_			Aggre	gate Proj Li	.imit Remain	ning 97,4	05,661.83	-		_					
	Scope Of Work														Term Code	Net 30 Days Ret	10% Disc 2%		
1	Bid Package Description																		
	Acknowledgement Date								Bank C	ode									
							_		Summ	arv								Hide Summa	arv
E SOV	Change Orders		Participation	At	tachments		Altern	nates		Special Pri	cing	Indu	isions		Exclusions	Text Co	odes	Free Form	
Task Code	Task Unit W/M	Rate Amour	nt Job Phase	Category	JB Bill Code	Tax1 Ta	xable Tax	2 Taxable	Tax3 Ta	xable R	etainage %	Expense Code	Fully Purch.			Long Description		Post Cha	ed/Unposted ange Orders

The limits which are maintained in subcontractor prequalification are reflected in the Subcontract Entry screen. The remaining amounts for both limits are also displayed for reference.

Subcontractor Pre	qualification			Dn8 Rating Res	et Self-Service Password Prin	It Report Check Spelling Workflow :	Save 📝 🗈 🏫
호 리 코 CMIC Field Menu ^			Subcontractor	Pregualification			
Count I	Code A IGARDEN	Tax ID 852666555		Prequalification Status Review Complete	Insurance Approval Level	AV	
search	Company A 1C ADDEN C deservice standar			Ten sumer Calencer D/ 3/	American Status	Color Area Americand	24
E 🗁 Project: Freshmart Office Building - Ch	Company A ISARDEN Subcond actor Vendor			Insurance category IV	Approval Status	Subs Are Approved	
Communication Management	Also Known As GARDEN-A1			Aggregate Project Limit: 100,000,000.00	Single Project Limit:	10,000,000.00	
Document Management	Legal Name A1GARDEN Services Incorporated			Joint Check 🖌			
Subcontractor Prequalification	Parent Corp.			CAR Approved	CAD Approved	00.00.2014	
Tuesday Blues Construction	Ctri Business Partner	*		CAP Approved	син ирротео	09-09-2014	
new application				Host Region	Urgent		
- Gracious Living	Street 100, Garden Street			Last Approval Date 24-03-2015	Renewal Date	24-03-2016	
TES-V10 Applicant - Oct. 13- c	Suite Suite 500 Floor V			Workflow Status Unsubmitted	Pregual Required	Pregual Required	
Wellington Power Corp	City Chicago						
ATWORKS INC	State Ilinois V	Zip 55555		Master Subco	itract		Union
F Applicants	Country US			Financial Stat	ment 🖌	C	ipen Shop 🗹
Self Service	County 03			OSHA 300A	Form 🖌	Sample Insura	nce Cert.
- Subcontractor Rating Setup	Contact Mr.GARDENER			Bonding Reference	.etter	Additional 0	Comments
Prequalifications Control	Phone (111) 222-3333	Fax (111) 222-3334					
	Tol Free	E-mail ravi@cmic.ca					
Budget & Cost Management			Project Ne	ton: Totals			
E C Subcontract	Current Contract Amount 181 319 45	81 To Date 484 695 95	Project ne	Remaining To Be Billed 180 734 763 79	_	arcent Contract To Date 150 000 00	00.00
- A1MASON-0001			T T		Y		
- Subcontract Change Orders	General User-Defined Fields Insurance	Safety Financial Financial Surety	Litigation	Approvals Submission Log Call Log	Project History F	References Contacts A	ttachments 🖌
CMC BIN 350		Header 1					
- Potential Change Items	User Defined Information	1					
Change Orders							
Change Transmittal	Comments						
Request For Payment							
Expanse Authorization							
Cost Status Query		Header 2					
Budget Status Query (Revenue)	E-Mail a 1garden @unicodemail.o	B					
Cost Status Query (Category)		Compliance					
- Budget Status Query (Category)	Acknowledge that you have reviewed our Subcontractor	code of conduct, that you accept its terms and will adhe	re to its principles,	and that you will report any suspect violation of the	code known to you.		
Contract Enrecepting with PCI Project		Cut and Paste the following URL to access the Su	pplier Code: https://	emic.ca/.			
Contract Creasing that Contract		out and i doto the fenering one to doto the ba					
	Acknowledgement Date		Advowledge Date For	ms T			
- PCI Markup Rules - D Subcontractor Tracking Log	Admowledgement Date		Advnowledge Date For	ms 25			
PCI Markup Rules Subcontractor Tracking Log Self Billed Payment Worksheet	Admowledgement Date		Admowledge Date For File Attachme	nts 25			
PCI Markup Rules Subcontractor Tracking Log Self Billed Payment Worksheet Set Management	Admowledgement Date 변형 ACK DATE ADF * 변형		Admowledge Date For File Attachme	me 1 25			
PCI Markup Rules Subcontractor Tracking Log Set Filled Payment Worksheet Set Management Reports Reports	Admowledgement Date		Acknowledge Date For File Attachme	ms 25			
Cl Martup Rules Cl Martup Rules Sel Biled Payment Worksheet Sel Biled Payment Worksheet Georgenet Seports Se User-Defined Logs User-Defined Logs	Admonitedgement Date		Acknowledge Date For File Attachme	ma 🖓 ma Yang Yang Yang Yang Yang Yang Yang Yan			
PCI Markup Rules Subcontractor Tracking Log Set Bilde Payment Worksheet Port Reports Worksheet Set Management Worksheet Seconds Fill Mantenance Fill Mantenance Fill Mantenance	Adrowledgement Date		Acknowledge Date For File Attachme	ms * Es			
Cl Martup Rules Cl Martup Rules Cl Status Annual Cl Status Cl Sta	Aderowledgement: Date		Acknowledge Date For File Attachme	me North Control Contr			

Project History Totals are displayed at the bottom of the upper section. This presents an overall view on the subcontractor's current contract, billed to date, and remaining to be billed amounts.

NOTE: The largest contract to-date is also reported.

Joint Check – Checkbox

The 'Joint Check' checkbox is used to assign a compliance code to the subcontracts for the purpose of enforcing join-check and holding the payments.

The subcontract application company control has a Compliance Code field for this purpose. Users may enter or select a valid compliance code (non-date sensitive) defined for the joint-check compliance.

The 'Joint-Check' checkbox has a default value of unchecked for all subcontractors. When the 'Joint-Check' box is checked and the Prequalification Required field is also set to a value of "Prequal Required", then upon saving, all the subcontractors and open vouchers for the vendor will be inserted/updated with the compliance code and set as non-compliant. Any new subcontracts created for the

vendor, will also be assigned with the joint-check compliance code. When either one or both fields are set with the value of unchecked or "Not Applicable", then upon saving, the compliance code will be deleted from all subcontracts and open vouchers for the same vendor.

Locations - Tab

Subcontractor Pred	qualificat	ion								Dn0 Rati	ing Reset Self-Service	Password Print	t Report Check Spelling	Workflow Save	₽ 🖬 🏟
¢ 🕀 🗄 CMiC Field Menu							Cor	tractor Pres	qualification						
Search Go	Code	DANFORTH			Tax ID	999910			Prequalification	n Status Review (Complete 🗸	Insurance Rati	ng 🗸		
	Company	Danforth							Insurance C	ategory V		Approval Stat	us Subs Are Approved		~
Project: Westin Savannah Harbor (183100)	Also Known As	s							Appreciate Proje	ct Limit: 15.000.0	00.00	Single Project Lim	it: 5.000.000.00		
Communication Management Document Management	Logal Manual								riggregoterroje			anger reject on			
Contractor Pregualification	Legal Name	-													
🗄 🗁 Contractors	Parent Corp.								CAPH			CAP Approv	ed		
- A1LAND	Ctrl Business Partner	r							Host	Region		Urge	nt 🗌		
DANFORTH	Street	t							Last Approv	val Date	120	Renewal Da	ste 🛛 🖏		
Self Service	Suite	P							Workflow	v Status Unsubmitt	ed	Pregual Require	ed Pregual Required	\sim	
Contractor Rating Setup	Ch.										Master Subcontra	at 🗆			
Prequalfications Control	City	y									Financial Statemer			Open	Shop
Workflow Notification	State	District of Co	olumbia 🗸		Zip						OSHA 300A For	m []		Sample Insurance	Cert.
Bid Management	Country	У								B	onding Reference Lette			Additional Com	nents
Dudget & Cost Management Site Management	Contact	t													
E Ca Reports	Phone	p			Fax										
E 🛄 User-Defined Logs	Tel Free				Engl			1							
File Maintenance		-			L mon										
Subcontractor Reviews							1	roject Histo	ory Totals						
Drawing Management		Curre	nt Contract Amount 13	,085.00		Bill To Date .00			Remaining To E	e Biled 13,085.0	0		Largest Contract	To Date 13,085.0	0
- Drawing Log	_														
Subcontractor Reviews	Locations	General	User-Defined Fields	Insurance	Safety	Financial	Financial	Surety	Litigation	Approvals	Submission Log	Call Log	Project History	References	Contacts
	Sele	ected Regions							Add	iress					Action ^
	ATLANTA	Atlanta, GA		Address Code			Nar	ne							+ ×
	AUS	Australia		Church									ph		
	AUSTIN	Austin, TX		Street									Phone		
	CENTRAL	Central		Suite											
	CHRLOTTE	Charlottesville	Area	City									Fax		
	CONNECT	Connecticut		State			~	Tip .					Tol Free		
	DELAWARE	Delaware					-	-							
	DOC	District of Colu	mbia 🗌	Country											
	EAST	East		Contact									E-mail		
	FAIRFAX	Fairfax, VA													- +
	IOWA	lowa													
	MAINE	Massachusette	• 0	1											
	MARYB	Maryland - Bat	imore												
	MARYW	Maryland - We	stern	1											

The Locations tab on the lower section allows selecting the regions of operation for the subcontractor. On the right, address codes and contact information for each location may be maintained.

General - Tab

Subcontractor Pred	qualificati	ion					DnB Rating Re	eset Self-Service Passwo	rd PrintReport CheckSp	sling Workflow Save	C 🗈 🍙
유리한 CMIC Field Menu					Contract	or Prequalitication					
search ()	Code	DANFORTH	Ta	w ID 7 999910		Prequalificat	tion Status Review Comple	ete 🗸 Insura	ance Rating 🔍		
Project: Westin Savannah Harbor (183100)	Also Known At	Lantorth				Angregate Pro	e Category	Appr Single P	roloct Limit: 5 000 000 00	ovec	~
Ocument Management	Larval Name										
🖹 🦰 Contractor Prequalification	Desperiod in					CAL	P.Dequired	CA	P Annroued	3	
E Contractors	Parent Corp								Uncent -	-0	
	Ctrl Business Partne	a	<u> </u>			^	аннуал				
Applicanta	Stree	et				Last App	roval Date	_Bo Ro	newal Date	20	
- Gelt Service	Suite	c				Workf	low Status Unsubmitted	Prequ	of Required Pregiod Regui	ed 🗸	
Contractor Rating Sctup	City	у					м	laster Subcontract 🗌			Union
	State	District of Columbia		ZIp			F	nancial Statement		Open	Shop []
🗄 🦲 Bid Management	Country	Y					Rondon	Doference Letter		Sample prisorance	
Budget & Cost Management	Contac	at l					DO NOT	Incleasing netter 1.1		Additional Com	iera i
T C Reports	Phone			East							
🔟 🦲 Oser-Debred Logs	Tel Con			C and							
E Cie Maintenance	Torried	•		L-filai							
E Security					Projec	d History Totals					
- 🔄 Drawing Management		Current Contract Amount 13	,085.00	DII To Date	: .00	Renaining T	o De Diled 13,085.00		Largest Co	ntract To Date 13,085.0	0
🕒 Drewing Log		+									
🔟 🧾 Subcontractor Reviewa	+ Locations	General User Defined Fields	Insurance Sa	fety Financia	l Financial Si	urety Litigation	Approvals 5	ibmission Log G	all Log Project Hist	ory References	Contacts
				_	Licen	rac Information					
		Authority	tiass		License Nu	mher		Date Lx	lae	Action	+
		•	Frade Information					Certifying	Agencies		
			SI Nambu n		As	line		MBES Information			
	01 - General Require	ements		*	+:	X 🛛 Disability Ow	ned Dusiness Enterprise	Minanty Owned U	usiness Linterprise	Not Applicable	
	02200 - Site Prepara	ation			+:	X Uther		Privately Owned L	nterprise	Publidy Owned Enterprise	.
	03050 Basic Concr	rete Materials and Methods			+:	🗙 🔲 Small Dusines	is Enterprise	Veteran Owned D	usiness Enterprise	Woman Owned Dusiness I	Enterprise
	01300 Administrativ	ive Requirements		*	+	X U Other					
					-	+	Cer	Bfying Agency		Actor	
											+
				_	Uni	on Affiliations					_
			Name					Actor	1		
	L										+

The General tab allows for the maintenance of trade information, such as CSI numbers, certifying agencies, and license information of a subcontractor.

User Defined Fields - Tab

	CMiC Field Menu							Subconti	ractor Prequalificat	on						
arch	Go	Code	AIGARDEN			Tax ID 852666	555		Prequalification S	atus Review O	mplete 🗸 🗸	Insurance App	proval Level	AV		
		Company	A1GARDEN Subcontra	ictor Vendor					Insurance Cate	gory IV 🗸		Appr	oval Status	Subs Are Appro	ved	
Projec	ct: Freshmart Office Building - Chicago I mounication Management	Also Known As	GARDEN-A1						Aggregate Project I	imit: 100,000,0	0.00	Single Pr	oject Limit:	10,000,000.00		
E Doc	cument Management	Legal Name	A1GARDEN Services 1	ncorporated					Joint C	heck 🔽						
🖯 🔁 Sut	bcontractor Prequalification	Parent Corn							CAP App	oved 🗸		CA	P Approved	09-09-2014	100	
	Subcontractors	Ctrl Business Partner	AL CEMENT INDUSTR	TES -RP NAME					Host R	nion			Urgent			
-	new application	Street	100. Carden Street	acon on normal	_				Last Approval	Date 24-03-20	15	Re	newal Date	24-03-2016	12	
	Gracious Living	Sueer	Cuite Coo Share M						Workflow C	atus Uscuberitto		Produ	al Required	Broowal Boowing	4 1	
	IES-V10 Applicant - Oct. 13- check t Wellington Power Coro	Suite	Suite 500 Floor V						WOINIOW 3	atus onsoonnitte	Master Color	riequ	arriveguireu	Frequal Require	u r	Union
	A1WORKS INC	City	Chicago								Financial Stat	tement 🔽			00	en Shon 🔽
14	A1GARDEN Subcontractor Vendor	State *	Ilinois	~		Zip 55555					OSHA 300/	Form 🔽			Sample Insuran	ce Cert.
	Applicants Self Service	Country	US							В	onding Reference	Letter			Additional Co	mments
	Subcontractor Rating Setup	Contact	Mr.GARDENER													
	Prequalfications Control	Phone	(111) 222-3333			Fax (111) 2	22-3334									
e Co Bid	Workflow Notification	Tall Fran	-		7	P mult muldhe	aia an 7	- E				~				
E 🚺 Bud	dget & Cost Management	 General Us 	er-Defined Fields	Insurance	Safety	Financial	Financial	Surety	Litigation	Approvals	Submission	Log Cal	Log	Project Histor	y References	Conta
🛄 Site	e Management						Head	er 1								
E C Rep	ports or Defined Leas		User D	efined Informatio	n											
File	Maintenance		0													
🛛 🦲 Sec	curity		Comments													
🗄 🦲 Sub	bcontractor Reviews															
new	w folder						Hear	or 2								
			E-Mail al card	ion@unicodom	1											
			C Mon organ	rengenicodenigija			Comp	lance								
		Acknowledge that vo	ou have reviewed ou	r Subcontractor	code of cond	uct, that you as	cent its terms an	l will adhere t	o its principles, and	that you will re	port any suspec	t violation of th	ie code kn	own to you.		
					Cut and	Paste the folk	wing URL to acc	ess the Suppli	er Code: https://cmie	.ca/.						
		A star south	decision from the	62	curum	asto the form	in the to use	A share	uladas Data Carra 1		60.					
		Acknowle	ogement vate	LO				Ackno	wieage Date Forms		U ()					
		AC	K DATE ADF	20					File Attachments	25						

The User Defined Fields tab is used to maintain any additional information that may be required to be entered for the subcontractor.

Insurance - Tab

ÐÐ	CMiC Field Menu							Subcontr	actor Prequalificati	on						
arch	Go	C	Code AIGARDEN		Tax II	852666555			Prequalification St	atus Review C	omplete 🗸 🗸	Insurance App	oval Level	Α 🗸		
	t Freehmant Offlag Pulliding Chicago I	Comp	pany AIGARDEN Subcontra	ctor Vendor					Insurance Cate	gory IV 🗸		Appro	wal Status	Subs Are Approve	d	~
E Cor	mmunication Management	Also Knov	vn As GARDEN-A1						Aggregate Project Li	mit: 100,000,0	00.00	Single Pro	ject Limit:	10,000,000.00		
🗄 🦲 Doo	cument Management	Legal I	Name AIGARDEN Services 1	ncorporated					Joint Cl	neck 🗹						
🖻 🔁 Sub	contractor Prequalification	Parent	Corp.						CAP Appro	oved 🔽		CAF	Approved	09-09-2014	Eb.	
	Subcontractors Tuesday Blues Construction	Ctrl Business Pa	rtner A1 CEMENT INDUSTR	ESBP NAME					Host Re	aion			Urgent			
	new application		treat 100 Carden Street		_				Last Approval I	Date 24-03-20	15	Rer	ewal Date	24-03-2016	B	
H	Gracious Living	-	Culte Colte SOO Share M						Workflow St	atus Unsubmitte	4	Broquit	I Required	Broqual Required	-0	
	IES-V10 Applicant - Oct. 13- check 1 Wellington Power Corp		Suite Suite Suite Suite Suite						WOLNIOW SL			rieque	rikequireu	Frequal Required		
	A1WORKS INC		City Chicago								Einancial Stat	ament Z			Oner	Shop 2
4	A1GARDEN Subcontractor Vendor	S	itate Illinois	~	Z	ip 55555					OSHA 300A	Form 🔽			Sample Insurano	e Cert.
•	Applicants	Co	untry US							В	onding Reference	Letter			Additional Corr	iments
	Subcontractor Rating Setup	Co	intact Mr.GARDENER													
	Prequalifications Control	F	hone (111) 222-3333		Fa	x (111) 222-33	34									
	Workflow Notification	Tall	Free		C			124								
H Bid	Management Inst & Cost Management	 General 	User-Defined Fields	Insurance	Safety	Financial	Financial	Surety	Litigation	Approvals	Submission	Log Call	Log	Project History	References	Contac
E Ca Site	Management	Insuranc	e Broker Name:	Allied	Insurance Broker L	td.						GL Expira	tion Date:	:	2-12-2020 🔯	
🗄 🦲 Rep	ports	Meets In	surance Requirements													
🗋 Use	er-Defined Logs	GL Limits	s per occurence are only \$1M	with no Umbrella/	Excess Policy.											
File	Maintenance	Aggrega	te limits do not apply separa	tely per project. (U	nless Aggregate + I	Umbrella Limits a	are greater tha	n \$5M)								
H Sec	cunty	Addition	al Insured Endorsement does	not cover complet	ed operations.											
	contractor Reviews	Mold Co	verage in GL Policy or Separa	te Pollution Liability	v Coverage.											
- Ilev	loidei	Addition	al Incured Endorroment deer	not include primar	, wording											
		Other	ar biscred chuorsement does	r not include primar	y wording.											
		Ouler	ine													
				lanceee												
		Insurance Commi	ents:													

The Insurance tab is used to manage insurance information of a subcontractor. Users may record the insurance broker's name, GL expiration date, and other insurance related information.

Safety - Tab

Subc	contractor Pred	qualificat	ion							DnB R	ating Reset Self-	Service Password	Print Report Ch	eck Speling Workflow :	Save 🛛 🗈
E₽	CMiC Field Menu							Subcontr	actor Prequali	ication					
arch	60	Code	A1GARDEN		Tax ID	852666555			Prequalificat	ion Status Review C	Complete 🗸 🗸	Insurance Appro	wal Level 🛛 🗸		
		Company	A1GARDEN Subcontrac	tor Vendor					Insurance	Category IV ~		Approv	al Status Subs Are	Approved	\sim
Project:	Freshmart Office Building - Chicago I	Also Known As	GARDEN-A1						Aggregate Pro	lect Limit: 100,000,0	00.00	Single Prote	ect Limit: 10,000,00	0.00	
E Docu	munication management	Local Nama	ALCARDEN Convicor In	ornorated						aint Check					
E C Subc	ontractor Prequalification	Cegurinaine	ALGRADER SERVICES IN	or por aced					C 40	Annual I		CAD		14 13	
🖻 🔁 Si	ubcontractors	Parent Corp.			line i				CAP	Approved [V]		CAP /	Approved 09-09-20	014 00	
	Tuesday Blues Construction	Ctrl Business Partner	A1 CEMENT INDUSTRI	SBP NAME					H	ist Region			Urgent		
	Gracious Living	Street	100, Garden Street						Last App	roval Date 24-03-20	015	Rene	wal Date 24-03-20	016	
-0	TES-V10 Applicant - Oct. 13- check t	Suite	Suite 500 Floor V						Workfl	ow Status Unsubmitte	ed	Prequal	Required Prequal R	Required 🗸	
	Wellington Power Corp	City	Chicago								Master Subco	intract 🖌			Union 🗌
	A1WORKS INC A1GARDEN Subcontractor Vendor	State	Illinois	~	Zip	55555					Financial Stat	ement 🗹		0	pen Shop 🔽
H 🗀 🗛	oplicants	Country	us								OSHA 300A	Form 🗹		Sample Insura	nce Cert. 🗌
- 📄 Se	elf Service	Contrat									Bonding Reference	Letter		Additional C	omments
- Su	abcontractor Rating Setup	Contact	MILGARDENER												
	equancations Control	Phone	(111) 222-3333		Fab	(111) 222-	3334								
🖲 🦲 Bid M	lanagement	Tall Free			C and	en ith ente		T-A		(((
🗄 🦲 Budg	et & Cost Management	 General Us 	ser-Defined Fields	Insurance	Safety F	inancial	Financial	Surety	Litigation	Approvals	Submission	Log Call L	og Project F	listory Reference	s Contacts
Site N	danagement	Does your company ha	we a written field based	safety program?	6	Yes No									
E C User-	ns Defined Logs	Does your company na	we a substance abuse p	oncy?		Yes No	How Office								
E D File N	faintenance	Do you conduct projec	t site safety inspections		č	Vies 🔍 No	How Ofter	0							
🗄 🦲 Secu	rity	Who follows up on the	se Inspections?		0	res eno	non one	test							
Subci	ontractor Reviews older	Freeze Year	Year	Citations	EMR		RIR	LTIR		R	R	VH	ANE	Fatalitie	s Action
			2017	0			0		0	0.00		0		0 0	+×
			2016	0		0	0		0	0.00		0		0 0	+×
			2015	0		5	0		0	0.00		0		0 0	+×
			2014	0		2	0		0	0.00		0		0 0	+
			2013	5			1		1	400.000.00		1		0	- + x
			2013				-		-	0.00		-		0	1.
			2012				0		•	0.00		0		0	
			2011	1		L	U		v	0.00		U		0	T ^

The Safety tab is used to manage safety statistics of a subcontractor. The number of incidents under various categories may be maintained for each year to track the safety history of a subcontractor.

The Incident Rate (IR) field is calculated: (RIR + LTIR) X 200000/FWH

- **RIR** = Recordable Incident Rate
- LTIR = Lost Time Incident Rate
- **FWH** = Total Hours Worked by All Employees

Freeze Year – Checkbox

The Freeze Year checkbox, when checked, causes fields that were previously editable (mostly the amount fields) to not be available for editing for that particular year that is frozen.

 General Use 	r-Defined Fields	Insurance	Safety Financia	Financial	Surety Liti	gation Approvals	Submissio	on Log Call Log	Project History	References	Contacts 🕴
Does your company have	e a written field based :	safety program?	🔾 Yes 🔘	No							
Does your company have	e a substance abuse po	licy?	🔾 Yes 🖲	No							
Do you hold site safety n	neetings?		🔾 Yes 🖲	No How Often	?						
Do you conduct project s	site safety inspections?		🔾 Yes 🖲	No How Often	?						
Who follows up on these	Inspections?				test						
Freeze Year	Year	Citations	EMR	RIR	LTIR	IR		FWH	ANE	Fatalities	Action
	2017	0	0	0	0	0.00		0	0	0	+×
	2016	0	0	0	0	0.00		0	0	0	+×
	2015	0	0	0	0	0.00		0	0	0	+ ×
	2014	0	0	0	0	0.00		0	0	0	+
	2013	5	1	1	1	400,000.00		1	0	0	+×
	2012	5	1	0	0	0.00		0	0	0	+×
	2011	1	1	0	0	0.00		0	0	0	+×

The ability to see and update this checkbox is controlled by a prequal (VPQ) collaboration privilege: 'Freeze Year (on Financial and Safety tabs)', and applies to Self Service and SC Prequalification screens. By default, the privilege is unchecked.

Financial - Tab

Subcontractor Pred	qualification						Dn8 Rating	Reset Self-Service Password	Print Report Check Spelling V	Vorkflow Save 📝 🗈 🏫
				*****	Subcontractor	Pregualification				
Search Go	Code A IGARDEN			Tax ID 852666555	_	Prequalification Status Re	wiew Complete	Insurance Approval Level	A 🗸	
	Company A1GARDEN S	ubcontractor Vendor				Insurance Category IV	~	Approval Status	Subs Are Approved	\sim
Project: Freshmart Office Building - Chicag Ormunication Management	Also Known As GARDEN-A1					Aggregate Project Limit: 100	0,000,000.00	Single Project Limit:	10,000,000.00	
Document Management	Legal Name A1GARDEN Se	ervices Incorporated				Joint Check 🗸]			
Subcontractor Prequalification	Parent Corp.					CAP Approved	1	CAP Approved	09-09-2014	
Tuesday Blues Construction	Ctrl Business Partner A1 CEMENT I	NDUSTRIES BP NAME				Host Panion		Ikoant		
- new application	Street 100, Garden S	Street				Last Assessed Date 24	02 2015	Descent Date	24.02.2016	
TES-V10 Applicant - Oct. 13- checi	Suite Suite 500 Floo	or V				Waldaw Claba Usa	-03-2013 000	Renewal Date	24+03+2016 EG	
- Wellington Power Corp	City Chicago					WORKIOW Status Ons	ubmitteo	Prequai Regureu	Prequal Required	
A1WORKS INC A1GARDEN Subcontractor Vendor	State Illinois	~		Zp 55555			Master Subco	ontract 🗹		Union
+ 🗀 Applicants	Country US						hinancial Star	tement 🗹		Open Shop 🔽
Self Service	Contact Mr.GARDENER	R					OSHA 300	A Form	San	pie Insurance Cert.
	Phone (111) 222-33	33		Fax (111) 222-3334			bonding Kelerence	cetter []	,	ocidonal comments
Workflow Notification	Toll Free			E-mail ravi@cmic.ca	\$					
Budget & Cost Management					Project Hi	story Totals				
Site Management	Current Cont	ract Amount 181,219,459	.74	Bill To Date 484,695.95	,	Remaining To Be Billed 1	30,734,763.79		Largest Contract To Date 15),000,000.00
George George George George George George George Ge	General User-Defined Fi	elds Insurance	Safety Finan	cial Financial Surety	/ Litigation	Approvals Submissi	on Log Call Log	Project History R	eferences Contacts	Attachments 🖌
Security Subcontractor Reviews		Year Ending 2019 🗸	+ ×							^
- new folder	Hghe	st Dollar Amount	1.00				Average Project Size	1.00		
	L	egal Entity Type Charity/N	on Profit	\sim			Current Assets	.00		
	Year Co	mpany Founded 2010					Total Assets	.00		
	Fisc	al Year End Date 🛛 Jan 🖂	1 ~				Average Receivables	.00		
	Amou	nt Line Of Credit	.00				Current Liabilities	.00		
	Again	st Line Of Credit	.00				Total Liabilities	.00		
	[D&B Number					Net Equity	.00		
		D&B Paydex No					Current Year Revenues	.00		
	Any Prev	ious companies? New Comp	anies				Net Income	.00		
		Inv Subsidiaries? View Subsi	fiaries				Current Backlog as of Today	.00		
	Par	ent Organization					Average Monthly Billing	0.00		
		and Ranko estru 2								
	C res Control rats four nimit ever n	Accountant					Elegandal Exempt			_
		Wew Finan	cial Contacts				- Handai Pormai	View Bank Information		
< >		Financial Comment								~

The Financials tab is used to manage the financial information of a subcontractor, and to review the financial stability for prequalification. New financial year information may be created by clicking on the \pm icon. Users may elect to copy the previous year's information as well.

The View Companies link opens a pop-up window to enter/edit any previous companies or subsidiary company information. Also, users may view financial contacts and banking information by opening the pop-up window (not shown in the above screen).

Freeze Year - Checkbox

The 'Freeze Year' checkbox, when checked, causes fields that were previously editable (mostly the amount fields) to not be available for editing for that particular year that is frozen.

			Project History Totals			
Current Contract An	ount 181,219,459.74	Bill To Date 484,695.95	Remain	ing To Be Billed 180,734,763.79	Largest Cor	ntract To Date 150,000,000.00
Council University of Could	Turner Colta Course	al Canadal Canada Lillion		Culture Law Calling Day	And History Defermine	Contrata Allendaria de la
General User-Defined Fields	Insurance Sarety Finance	al Financial Surety Litiga	ation Approvais	Submission Log Call Log Pro	ject history References	Contacts Attachments •
Year Ending	2019 🗸 🕂 🗙			Freeze Year		~
Highest Dollar Amount	100			Average Project Size	1.00	
Legal Entity Type	Charity/Non Profit			Year Company Founded	2010	
Fiscal Year End Date	Jan 🗸 1 🗸					
Amount Line Of Credit	.00			Against Line Of Credit	.00	
D8B Number				D&B Paydex No		
Any Previous companies?	View Companies			Any Subsidiaries?	View Subsidiaries	
Parent Organization				○Yes ●No Has Your Firm Ever Filed Bankruptcy?		
Accountant				Financial Format		
	View Financial Contacts				View Bank Information	
Fin	ancial Comment					

The ability to see and update this checkbox is controlled by a prequal (VPQ) collaboration privilege: 'Freeze Year (on Financial and Safety tabs)', and applies to Self Service and SC Prequalification screens. By default the privilege is unchecked.

Surety - Tab

			[]]]]]]]	///////			/////	999999999						
CMiC Field Menu							Subcontra	ctor Prequalification						
Search Go	Code A1GA	ARDEN		Tax ID	852666555			Prequalification Status	Review Complete	✓ Insura	ince Approval Lev	el A 🗸		
-	Company A1GA	ARDEN Subcontractor V	endor					Insurance Category	IV ~		Approval State	Subs Are Approved	l.	~
Project: Freshmart Office Building - Chicago I	Also Known As GARI	DEN-A1						Aggregate Project Limit:	100,000,000.00	s	ingle Project Limi	t: 10,000,000.00		
Communication Management Document Management	Local Name A1C	ARDEN Convices Incorne	orated					Joint Cherk						
Subcontractor Pregualification	Cegar Name Ard	ANDEN SERVICES INCOLDE	oraceo											
E Cubcontractors	Parent Corp.							CAP Approved	M		CAP Approve	09-09-2014	0	
Tuesday Blues Construction	Ctrl Business Partner A1 C	EMENT INDUSTRIESB	IP NAME					Host Region			Urge	nt 🛄		
new application	Street 100,	Garden Street						Last Approval Date	24-03-2015	6	Renewal Dat	e 24-03-2016	0	
TES-V10 Applicant - Oct. 13- check t	Suite Suite	e 500 Floor V						Workflow Status	Unsubmitted		Prequal Require	d Prequal Required	~	
	City Chica	800							Maste	r Subcontract	2		Uni	on 🗌
A1WORKS INC	State Illing	nis	×	Zie	55555				Finan	cial Statement -	2		Open Sh	op 🗹
Anglicante					55555				OS	IA 300A Form	2		Sample Insurance Ce	rt. 🗌
Self Service	Country US								Bonding Re	ference Letter [Additional Commer	nts 🗌
	Contact Mr.G	SARDENER												
- Prequalfications Control	Phone (111) 222-3333		Fax	(111) 222-33	34	1							
	 General User-D 	Defined Fields	Insurance	Safety	Financial	Financial	Surety	Litigation A	pprovals Su	mission Loa	Call Log	Project Histor	References	Contact
Bid Management Budest & Cost Management	Is your Company Bo	ondable?						<u> </u>		5			,	
Site Management		Surety	Company Sure	ty Inc						\$ 0 - 1	\$ 100 K	10%		
🖽 🧰 Reports		, Pro	akar Nama Arru	ranco Brokoro						# 100 K	- # 500 K	100		
🕀 🦲 User-Defined Logs		DIC	oker warne Assu	diffe brokers						\$ 100 K	- 5 300 K	10.10		
File Maintenance			Phone (444)	777-7777						\$ 500 H	(-\$1M .	10%		
Subcontractor Reviews		Single Project Bondin	ig Capacity	15,00	0,000.00					\$1 M	-\$2 M .	10%		
new folder	Ag	ggregate Project Bondin	ig Capacity	750,00	0,000.00					\$ 2 M	-\$5M	10%		
_	c	Current amount under b	bond today	45,00	0,000.00									
		Su	irety Status App	oroved 🗸]									
			Арр	roved on 01/01/	2014									
		Surety	Comments											

The Surety tab is for maintaining the bonding information of a subcontractor which may be used as protection against subcontractor defaults. Also, the surety status such as approved, unapproved, etc. may be set by selecting from the drop-down list. Additional information on this tab may also be entered in the comments section.

Litigation - Tab

Subcontract	tor Prec	qualificat	tion							DnB Rating Reset Self-	Service Passwor	rd Print Re	eport Check Speling	Workflow Save	12 🖬 🍙
🗘 🕀 🖭 🛛 CMiC Field Menu								Subcontra	actor Prequalification						^
Search	60	Code	AIGARDEN		Tax ID	852666555			Prequalification Status	Review Complete 🗸	Insurance App	proval Level	A ~		
	_	Company	A1GARDEN Subcontrac	or Vendor					Insurance Category	IV ~	Appr	oval Status	Subs Are Approved		~
Project: Freshmart Office B	uilding - Chicago I	Also Known A	GARDEN-A1						Aggregate Project Limit:	100.000.000.00	Single Pr	olect Limit:	10.000.000.00		
Communication Managem Document Management	ient	Logal Nam	ALCARDEN Convices In	boteromor					Joint Check			·			
🗄 🛅 Subcontractor Prequalifica	ition	Legal Natio	e Alganden Services II	orporated					CID Lorented						
E Constructors		Parent Corp	L						CAP Approved		CA	P Approved	09-09-2014		
Tuesday Blues Co	onstruction	Ctrl Business Partne	A1 CEMENT INDUSTRE	SBP NAME					Host Region			Urgent			
		Stree	t 100, Garden Street						Last Approval Date	24-03-2015 🔯	Re	newal Date	24-03-2016		
	nt - Oct. 13- check t	Suit	e Suite 500 Floor V						Workflow Status	Unsubmitted	Prequ	al Required	Pregual Required	~	
	Corp	01	Chicago							Master Subo	contract 🗸			Unic	
A1WORKS INC		Ctate	Tlinnin	14	7	e FFFFF				Financial Sta	atement 🔽			Open Sho	ep 🗹
A1GARDEN Subci	ontractor Vendor	State	annois		21	p 33333				OSHA 300	A Form 🗹			Sample Insurance Cer	t. 🗌
Self Service		Countr	y US							Bonding Reference	e Letter 📃			Additional Commen	ts
	Setup	Contac	t Mr.GARDENER												
- Prequalfications Contro	l l	Phon	e (111) 222-3333		Fa	× (111) 222-333	4		+						~
Workflow Notification		🕈 General 🚺	User-Defined Fields	Insurance	Safety	Financial	Financial	Surety	Litigation A	pprovals Submissi	ion Log 🚺 🕻	all Log	Project History	References	Contacts
Budget & Cost Management	tot	Any current litigation	with Owners or General	Contractors?		Ves Oh	In 2323	3wewe							
Gite Management		Any judgements aga	inst in the last 3 years?			O Yes @ h	10								
E C Reports		Any Principals of you	r company in litigation?			O Yes O	10								
E Diser-Defined Logs		Any paid liquidated of	lamages?			O Yes 🔍 N	40								
E Security		Any labor law violati	ons?			🔾 Yes 🔘 N	10								
Subcontractor Reviews		Have you ever defau	ited on a contract?			🔾 Yes 🔘 N	10								
- new folder		Ever failed to comple	ste a contract?			🔾 Yes 🔘 N	10								
		Have you ever been	terminated from a contra	ct?		🔿 Yes 🔘 N	10								
		Have you ever had y	our license revoked or su	spended?		🔾 Yes 🔍 N	lo Once	e due to non-o	ompliances						
			Litigation Status App	roved 🗸											
		L	Litigation Comments	ition Cleared											.1

The Litigation tab is used to track past and present litigation against the subcontractor. Litigation status may be updated from the available drop-down list as required and comments may be entered to record any detailed information.

Approvals - Tab

CMiC Field Menu								Su	bcontra	actor Prequalification						
Search Go		Code A1GARDE	N			Tax ID	852666555			Prequalification Status	Review Complete	✓ Insuran	ce Approval Leve	A ~		
	Co	mpany A1GARDE	N Subcontracto	or Vendor						Insurance Category	IV V		Approval Status	Subs Are Approve	d	~
Project: Freshmart Office Building - Chicago	Also Kr	own As GARDEN-	A1							Aggregate Project Limit:	100,000,000.00	Sit	ngle Project Limit:	10,000,000.00		
Communication Management										Joint Chark						
Subcontractor Pregualification	Lega	al Name AIGARDE	N Services Inc	orporated						Joint Check						
Subcontractors	Pare	nt Corp.								CAP Approved			CAP Approved	09-09-2014	0	
Tuesday Blues Construction	Ctrl Business	Partner A1 CEME	NT INDUSTRIES	SBP NAM	IE					Host Region			Urgent			
new application		Street 100, Gard	len Street							Last Approval Date	24-03-2015	6	Renewal Date	24-03-2016	20	
Gracious Living		0.0.0	61 M							Worlflow Status	Unsubmitted	-	Proquial Required	Drogual Deguired	-	
TES-V10 Applicant - Oct. 13- check	1	Suite Suite 500	FIGOR V							WOLKIOW Status	onsabinittea		Prequal Required	Frequal Required	-	
A1WORKS INC		City Chicago									Maste	er Subcontract	1		U	nion 🔄 👘
A1GARDEN Subcontractor Vendor		State Illinois		~	/	Z	55555				Finan	cial Statement 🗹]		Open S	.hop 🗹
Applicants		Country US									OSI	HA 300A Form	1		Sample Insurance (Jert.
Self Service											Bonding Re	ference Letter			Additional Comm	ents
- Subcontractor Rating Setup		Contact Mr.GARDI	ENER													
Prequalfications Control		Phone (111) 222	-3333			Fa	< (111) 222-33	34			+					
Workflow Notification	 General 	User-Defin	ed Fields	Insura	ance	Safety	Financial	Financial	Surety	Litigation	Approvals Sul	bmission Log	Call Log	Project Histo	ry References	Contac
Budget & Cost Management	Year Ending	2013 ~														
E G Site Management	Year Ending	Order App	rover Name	A	pproval Typ	e Date	Submitted	Date Received					Co	mments		Act
🗉 🧰 Reports						_										
🕀 🛄 User-Defined Logs	2013	1 Data Adm	in	Ins.	surance	~	20		٥ 📃							· · · ·
🕀 🦲 File Maintenance				_		_										
E Security	2013	2		▲ Ins	surance	~	20	0	۵							. +
a subcontractor reviews		1				1										
									w	orkflow Progress						
		A			un la		Data			onalon riogress						
	DE IEOTEO	Action	01/07	TCA 4	loie	40.00.0	Date			User			N	otes		
	REJECTED		515	1Cm		19-02-2	015	513	I CIVI	110 0	contact was found for	porsec_user				

The Approvals tab is used to assign and track one or more approvers by the approval types to facilitate the applicable workflows.

Submissions Log – Tab

Subcontractor Pred	qualifica	ition							Driß Rating	Reset Self-Se	rvice Password	I Print Repor	rt Check Speling	Workflow Save	2 🖬 🍙
🗘 🖃 🐑 CMiC Field Menu							Subcontr	actor Prequalification							^
Search Go	Coo	A1GARDEN		Tax ID	852666555			Prequalification Status	Review Com	plete 🗸	Insurance Appr	roval Level A	\sim		
Project: Freshmart Office Building - Chicago I Communication Management The Docume Management Subcontractor Propugatization Subcontractor Propugatization Gracious Lining Gracious Lining Gracious Lining AutoPACON Subcontractor Vendos Polya Application Subcontractor Vendos Polya Application	Compar Also Known Lagal Nai Parent Co Ctrl Business Partt Str Str Str Str Ctrl Sta Con Coun	vip ALGARDEN Subcontractor ALGARDEN Subcontractor GARDEN-A1 vip ALGARDEN Services Incor rp. ALGARDEN Services Incor ALCARDEN Services Incor File ALGARDEN Services Incor Conceptone Street Billowide Suite 500 Fileor V Chicago Billinois try US CM MIGARDENER CM MIGARDENER	Vendor porated BP NAME	Zip	55555			Insurance Category Aggregate Project Limit: Juint Chaek CAP Approved Hust Region Last Approval Date Workflow Status	Ⅳ ✓ 100,000,000.0 ✓ ✓ ✓ 24-03-2015 Unsubmitted Bond ✓	Master Subcom Financial Stater OSHA 300A R	Appro Single Pro CAP Ren Prequa tract (2) ment (2) form (2) etter []	val Status S ject Limit: 10, Approved 09 Urgent ewal Date 24 I Required Pr	ubs Are Approved ,000,000.00 -09-2014 -03-2016 Required	Union Open Shop Sample Insurance Cert. Additional Comments	
Prequalifications Control	Pho	ne (111) 222-3333		Fax	(111) 222-3	334				1					~
Workflow Notification	• General	User-Defined Fields	Insurance	Safety	Financial	Financial	Surety	Litigation	Approvals	Submissio	n Log Ca	all Log	Project History	References	Contacts
E Budget & Cost Management	Transmit No.	Date Sent	5	ient Via		Prequal Type		Sent To		Date Received		cc	c	Submission Detail	Action ^
🕀 🛄 Site Management 🕀 🛄 Reports 🖶 🛄 User-Defined Logs	001	20-11-2014	EMAIL			~	Mr.	GARDENER		10				First Renewal Notificatio (WORKFLOW)	×
Gile Maintenance Security Subcontractor Reviews	002	13-02-2015	EMAIL			~	test	: tester		6				Password Reset (PREQUAL)	×
	003	13-02-2015	EMAIL			~	tes	: tester		5				Password Reset (PREQUAL)	×
	004	05-06-2015	EMAIL			~	and	lrejs.zuravels@cmic.c		1				Password Reset (PREQUAL)	×
	005	07-10-2015	EMAIL			Y	Lor	DO NOT Gibson- USI		B				Password Reset (PREQUAL)	×

The Submission Log tab is used to keep a log of all transmissions when electronically sent to the subcontractor, such as changed password notifications and workflow notifications.

Call Log - Tab

 NextD NextD 	CMiC Field Menu								Subcontra	actor Prequalification					
earch	Go	0	ode"	AIGARDEN		Tax ID	852666555			Prequalification Status	Review Complete	 Insurance Approval Level 	A ~		
-		Comp	any	A1GARDEN Subcontract	or Vendor					Insurance Category	IV 🗸	Approval Status	Subs Are Approved		~
Proje	ct: Freshmart Office Building - Chicago I	Also Knov	/n As	GARDEN-A1						Aggregate Project Limit:	100,000,000.00	Single Project Limit:	10,000,000.00		
	ormenication management	Legal	lamo	A1CARDEN Sandras Inc	ornorated					Joint Check	2				
E C Su	bcontractor Prequalification	Legal	ane e	ATGARDEN Services Inc	orporated					out the second					
ē	Subcontractors	Parent	Corp.							CAP Approved	M	CAP Approved	09-09-2014		
	Tuesday Blues Construction	Ctrl Business Pa	rtner	A1 CEMENT INDUSTRIE	SBP NAME					Host Region		Urgent			
	new application	S	treet	100, Garden Street						Last Approval Date	24-03-2015 🔯	Renewal Date	24-03-2016 🔯		
	TES-V10 Applicant - Oct. 13- check 1		Suite	Suite 500 Floor V						Workflow Status	Unsubmitted	Prequal Required	Prequal Required	\sim	
	Wellington Power Corp		ON	Chicago							Master S	ubcontract 🗸		Unior	
	A1WORKS INC			directo di concesso di conces	100						Financial	Statement 🗹		Open Shop	
	A1GARDEN Subcontractor Vendor	-	tate	annois	~	21	p 22222				OSHA 3	00A Form 🗸	5	Sample Insurance Cert	Ē
	Applicants Self Senice	Co	untry	US							Bonding Refere	nce Letter		Additional Commenter	s 🗌
	Subcontractor Rating Setup	Co	ntact	Mr.GARDENER											
	Prequalfications Control	F	hone	(111) 222-3333		Fa	x (111) 222-3	334				1			
	Workflow Notification	 General 	lls	er-Defined Fields	Insurance	Safety	Financial	Financial	Surety	Litigation	Approvals Subr	aission Log Call Log	Project History	References	Conta
E Bio	d Management	Call No.		Contact Nam	ve:	1	hone	Call Da	te	Caller		Notes	Call Back	Call Back Date	LA
E Sit	te Management								_ #b						
🗄 🦲 Re	ports	001 CM	C Inc			555 888 9	999	01-10-2014	20	Aaron Best	A			30-09-2014	• +
	0.6 11														

The Call Log tab is used to maintain a log of all communications to and from the subcontractor.

Project History - Tab

Subco	ntractor Prec	qualificat	ion									DnB Rating	Reset Self-Se	rivice Passwo	ard Print Re	eport Check Speling	Workflow	v Save 🛛	🗈 🏠
\$ E E C	MiC Field Menu								Subcontr	actor Prequalif	ication								^
Search	60	Code	AIGARDEN			Tax II	\$52666555			Prequalificati	on Status	Review Com	plete 🗸	Insurance Ap	proval Level	A ~			
	_	Company	A1GARDEN S	ubcontracto	or Vendor					Insurance	Category	IV V		Арр	oroval Status	Subs Are Approved			~
Project: Fres	shmart Office Building - Chicago I	Also Known As	GARDEN-A1							Aggregate Proj	ect Limit:	100,000,000.	00	Single P	roject Limit:	10,000,000.00			
E Document	t Management	Legal Name	A1GARDEN S	ervices Inc	orporated					10	int Check	2							
E 🔁 Subcontra	actor Prequalification	Parent Corn								CAP	Annroved			C	AP Annroved	09-09-2014			
E 🔁 Subco	ontractors	Cel During Centre																	
	ew application	Ctri Business Partner	AI CEMENT I	NUUSTRIE	STOP NAME					HU	st Region		60.		orgent				
- Gr	racious Living	Stree	t 100, Garden	Street						Last Appr	oval Date	24-03-2015	E0	R	enewai Date	24-03-2016			
- <u> </u>	ES-V10 Applicant - Oct. 13- check t	Suite	Suite 500 Flo	or V						Workflo	ow Status	Unsubmitted		Prequ	ual Required	Prequal Required	\sim		
	/ellington Power Corp 1WORKS INC	City	Chicago										Master Subcor	itract 🗹				Union	1
- A1	1GARDEN Subcontractor Vendor	State	Illinois		~	Z	ip 55555						Financial State	ment 🗹				Open Shop	
🕀 🦲 Applica	ants	Country	US									0	OSHA 300A	Form			Sample Ins	urance Cert.	1
Self Se	ervice Dation Cation	Contac	Mr.GARDENE	R								bolic	ing Reference i				Audition	I Comments	
Pregus	affications Control	Phone	(111) 222-33	33		P	(111) 222-33	34											~
Workfl	low Notification	Cananal 1	leas Defined	Calda	Tananan	Calaba	Cinensial	Financial	Cumh		m Í a	a no no co lo	Cubminst	n taa	Calling	Destinet History	Def		Cantasta
🗉 🧰 Bid Manag	gement	General	Ser-Denned	reas	insurance	Salety	FILIALICIAL	Financial	Surety	Corda		approvais	SUDINISS		Call Log	Project ristory	Ration	rences	Contacts
Budget &	Cost Management	RVH01001 13	81740P	1381740	2	riojectitanie		138	17005		contract	Type Carr	210	000.00	0.00	210 000 00	6	07-01-2014	Rate It
Reports	agement	77 16	107P	LG 15107	project			77.4	1GA0001				17	598 15	0.00	17 598 16		09-02-2016	Rate It
🗉 🦲 User-Defin	ned Loga	RVHQ1001 16	1M	161M	P			GI	101				144	000.00	0.00	144 000 00		15-09-2016	Rate It
File Maint	tenance	CCC 14	91523M	1491523	4			GAI	RDEN1491523	3M			7	575.00	587.06	6 987 94		20-02-2015	Rate It
Security	actor Reviews	22 01	VPWP1	Project fo	r CMPWP			CM	GARDENPW	p			4.	000.00	0.00	4,000.00		26-04-2019	Rate It
	r	77 .19	PWPTESTO	js pwp te	st0			JSF	WPTEA1G00)1			2	000 00	0.00	2,000.00		26-04-2019	Rate It
		RVHQ1001 16	15464	1615464	- sc rfp CREATION			G10	000				35.	000.00 4	783.33	30,216.67		15-08-2016	Rate It
		RVHQ1001 10	0001	100001 N	lame of the Job			GA	R1001				8.	999.00 9.	.000.00	-1.00		26-10-2017	Rate It
		RVHQ1001 10	0001	100001 N	lame of the Job			G68	3965				45,	000.00	0.00	45,000.00		18-08-2017	Rate It
		RVHQ1001 10	0001	100001 N	lame of the Job			U88	18				25,	00.00	0.00	25,000.00		11-10-2016	Rate It
		RVHQ1001 10	0001	100001 N	lame of the Job			G92	20				16,	764.00	0.00	16,764.00		02-11-2017	Rate It
		RVHQ1001 10	10001	100001 N	lame of the Job			H68	19				19,	316.55	0.00	19,316.55		02-11-2017	Rate It
		RVHQ1001 10	0001	100001 N	lame of the Job			GA	R101				-10,	00.00	0.00	-10,000.00		27-10-2017	Rate It

The Project History tab includes company, project, contract code, and the amounts which the subcontractor is associated with. This is useful to view historical contract data in a log with the ability to critique and rate via a predefined questionnaire pop-up window.

Rate It

1 🗉	CMiC Field Menu								Subcon	tracti	or Pre	equali	icatio												
ch	60		Code	A1GARDEN				Tax ID	852666555		Prequa	alificati	on Stal	us F	eview	Compl	ete	\sim	Insuran	ce Approv	val Level	A ~			
		Com	pany 7	A1GARDEN S	ubcontract	or Vendor					Insu	urance	Catego	ry I	$I \sim$					Approva	al Status	Subs Are Approved			~
) Proje	t: Freshmart Office Building - Chicago I	Also Knov	wn As	GARDEN-A1						Ag	gregal	te Proj	ect Lin	a: 10	10,000,	00.00			Sin	igle Proje	ect Limit:	10,000,000.00			
	cument Management	Local	Namo		optices Inc	boteroene						10	int Che	d D	7										
Su Su	bcontractor Prequalification	cagai	-	ATRACTICE A	ervices are	orporated						C40			2					C10.4		0.00.0014	a.		
ē	Subcontractors	Parent	Corp.									CAP	Approv	ed L	1					CAP A	Approved		3		
	Tuesday Blues Construction	Ctrl Business Pa	artner	A1 CEMENT I	NDUSTRIE	SBP NAME	6	untitled - Mc	zilla Firefox							_			х		Urgent				
	Gracious Lision	5	Street	100, Garden	Street													_		Renew	wal Date	24-03-2016	•		
	TES-V10 Applicant - Oct. 13- check t		Suite	Suite 500 Flo	or V		(🛈 test4v10.cmic.ca:7785/cmictestv10x/PmScRating/ShowScRating.do?scm2 🚥 🥑 🏠 🧧 kqual Required Prequal Required 🔍																	
	Wellington Power Corp		City 0	Chicago			-										Sav	e C	lose	^				Union	ā
	A1WORKS INC		tate	Illinoie		×			Subcont	ractor	r Ratir	na						_	-					Open Shop	\checkmark
-	And		- toto					ate Completed	13-10-2014	Pro	niect C	ontact	Data	\dmin									Sample Ir	isurance Cert. [
1-0	Self Service		suntry [US			Ľ	ote completes		Deer			0000	Auge		-	E.	veellee	N/A				Additio	al Comments	
	Subcontractor Rating Setup	C C	ontact	Mr.GARDENE	R			Has your com	any managed to complete most	1 001			-	Aven	go			Accellent	10/5						
	Prequalfications Control	I	Phone ((111) 222-33	33		1.	project work w	thin the alloted schedules?	0	0	0	0	0		2									
Bir	Workflow Notification	🕈 General	Us	er-Defined	Fields	Insurance	2.	How do you m	anage your work.	0	0	0	0	0		C) (C)	Ca	all Log	Project Histor	y N	ferences	Co
Bu	dget & Cost Management	Company Code		roject Code			2	Had either a s	ate or the federal occupational Safety											To De	ate Rer	naining To Be Billed	Rating	Contract Date	1
5 Sit	e Management	RVHQ1001	1381	1740P	1381740	P	Ĩ.,	assess penalt	es against your firm?	9	0	9	9	9					'	0	0.00	210,000.0	J0 6	07-01-2012	4 F
Re	ports	ZZ	1510	07P	LG 1510	7 project		Had either a s	ate or the federal Environment				~			_				0	0.00	17,598.1	6	09-02-2016	6 F
	er-Defined Logs	RVHQ1001	1611	М	161M			(NoV) and/or a	ssess penalties against your firm?	9	9	9	9	9	9	210		10	1	0	0.00	144,000.0	JO	15-09-2016	6 F
Se	curity	CCC	1491	1523M	1491523	м		Had a period v	hen your firm had employees without		_		~	_	~	_	_			587	7.06	6,987.9	<u>44</u>	20-02-2016	5 R
Su	bcontractor Reviews	22	CMP	PWP1	Project fi	or CMPWP	5.	self-insurance	ensation insurance or state approved	0	0		0	0	0					0	0.00	4,000.0	JO	26-04-2019	9 R
) ne	v folder	ZZ	JSP	WPTESTO	js pwp te	estO	6.	Been a debtor	in a bankruptcy case?	0	0	0	0	0	0	00	DO	DIC		0	0.00	2,000.0	10	26-04-2019	9 R
		RVHQ1001	1615	5464	1615464	- sc rfp CREAT	7.	Filed for bankr	uptcy under any of the bankruptcy	0	0	0	0	0	0	20	20			4,783	3.33	30,216.6	iT	15-08-2016	6 R
		RVHQ1001	1000	001	100001	Name of the Job	Ľ.	Codes? Had a busines	s license or certifications been		-		-	-	-	-			+	9,000	0.00	-1.0	10	26-10-2017	7 F
		RVHQ1001	1000	001	100001	Name of the Job	8.	suspended?		0	0	0	0	0	0	C	D			0	0.00	45,000.0	01	18-08-2017	7 F
		RVHQ1001	1000	001	100001	Name of the Job		Had either a s	ate or the federal Environment				~				~ / /			~ 0	0.00	25,000.0	10	11-10-2016	6 F
		RVHQ1001	1000	001	100001 1	Name of the Job	-	Contraction and	G920									16,	764.00	0	0.00	16,764.0	00	02-11-2017	7 P
		RVHQ1001	1000	001	100001 1	Name of the Job			H689									19,	316.55	0	0.00	19,316.5	65	02-11-2017	7 F
		RVHQ1001	1000	001	1000011	Name of the Job			GAB101									-10	00 00	0	0.00	-10,000,0	00	27-10-201	7 0

The Rate It pop-up window is used to rate the work performed by the subcontractor, as well as add comments. These ratings are defined using the Subcontractor Rating Setup screen.

References – Tab

CMiC Field Menu					Subcontracto	Prequalification		
rðh Go	Code	A 1GARDEN		Tax ID 852666555		Prequalification Status Review Complete 🗸	Insurance Approval Level 🛛 A 🤝	
Project: Freehmart Office Building - Chicac	Company	A 1GARDEN Subcontractor	Vendor			Insurance Category IV 🗸	Approval Status Subs Are Appro	ved 🗸 🗸
Communication Management	Also Known As	GARDEN-A1				Aggregate Project Limit: 100,000,000.00	Single Project Limit: 10,000,000.00	
Document Management	Legal Name	A IGARDEN Services Incorp	porated			Joint Check 🗹		
Subcontractor Prequalification	Parent Corp.					CAP Approved 🗹	CAP Approved 09-09-2014	23
Tuesday Blues Construction	Ctrl Business Partner	A1 CEMENT INDUSTRIES.	BP NAME			Host Region	Urgent	
new application	Street	100, Garden Street				Last Approval Date 24-03-2015	Renewal Date 24-03-2016	25
TES-V10 Applicant - Oct. 13- checl	Suite	Suite 500 Floor V				Workflow Status Unsubmitted	Pregual Required Pregual Require	d v
A1GARDEN Subcontractor Vendor	City	Chicago				Master Su	bcontract 🖓	Union 🗌
Applicants	State	Tilinois	×.	7in 55555		Financial S	itatement 🗹	Open Shop 🗹
Subcontractor Rating Setup	Country	115				OSHA 3	00A Form 🗹	Sample Insurance Cert. 🗌
Prequalfications Control	Contact	Mr. CADDENED				Bonding Referen	ice Letter	Additional Comments
	Contact			E (111) 000 0001				
Budget & Cost Management	Filme	(111) 222-5555		Pax (111) 222-5554	FA			
Site Management	Toll Free			E-mail ravigeonic.ca				
Reports					Project H	listory Totals		
File Maintenance		Current Contract Amount	181,219,459.74	Bil To Date 484,695.95		Remaining To Be Billed 180,734,763.79	Lergest Contract	To Date 150,000,000.00
Security		0.0.10.11			1			Carta da Manda antes
a subcontractor Reviews	General Use	r-Defined Fields	Insurance Safety Fi	nancial Financial Surety	References	Approvais Submission Log Call Log	Project history References	Contacts Attachments Attachments
	Company Name:	BC Continental Ltd				Contact Name: ABC	Contact	
	Street	00 Downtown				E-mail abro	ontinental@crc.crc	
	ou cou							T *

The References tab is used for the entry of all references associated with the subcontractor.

Contacts - Tab

Tax ™ 35266535 Tax № 1	
toto Wade toto Wade toto Wade Buruance Collego yr Agrouel Rescue Agroue	
Aggregate Project Limit: 10,000,000.00 Single Project Limit: 10,000,000.00 Single Project Limit: 10,000,000.00 South Code (2) ColP Approved (0+09-2014) ColP Approved (0+09-2014) ColP Approved (0+09-2014) Limit Approved Dia (2+0-2015) Workfow Status Unabunited Precipial Required Precipial Require	v.
And Charles and Angenet and An	
CAP Approved () CAP Approved () 09-09-2014 () ES-67 NAVE () ES-67 NAVE () ES-67 NAVE () ES-67 NAVE () CAP Approved () 09-09-2014 () House Raymon () CAP Approved () 09-09-2014 () House Cap Approved () 09-09-2014 () Used () Used () Workfow Status Unsubmitted () Proved Status Unsubmitted () Prov	
ES- 6P NAVE ES- 6P NAVE ES- 6P NAVE Correspond to the second of the s	4
trol Kalon trol	و
Ended States Contract To Det 1942-953	
Workflow Status Unsubentited Preguil Regard Preguil Regard Image: Space of the state of the st	3
Zep 55555 Photo Statement 2 Text 20 55555 Phone distance OH X00A Prem 2 Bording Reference Letter Banding Reference Letter Real randomic.cs Project listory Totals Project listory Totals Ref. 180,219,499.74 Bit To Date 484,695.55 Remarking Toble Bited 180,734,763.79 Larget Contract To Date 141,000 FL	~
Image: Contract To Date: Apple:	Union 🗌
OSH X004 From 2 Bording Reference Letter Braid fraid/ownic.cs Fraid/ownic.cs Project History Totals Project History Totals Vit 181,219,499.74 Bit To bate 484,695.95 Remarking Table Billed 180,734,763.79 Largest Contract To Die	Open Shop 🖌
Bit Option 2014 Bit Option	Sample Insurance Cert. 🗌
Fair Fill Fill <th< td=""><td>Additional Comments</td></th<>	Additional Comments
Project History Totals unt 183,219,459.74 Bill To bale. 484,695.55 Remaining To Be Billed. 180,724,763.79 Largest Contract To Dire. 181,219,459.74	
Examily rank@calc.ca Calc Project History Totals unt 181,219,459.74 Bill To Date: 484,695.95 Remaining To Bit Billed: 188,734,763.79 Largest Contract To Date: 1	
Project History Totals unt 181,219,459.74 Bill To Date: 484,695.55 Remaining To Be Billed: 180,724,763.79 Largest Contract To Date:	
unt 181,219,459.74 Bil To Date 484,695.95 Remaining To Be Biled 180,734,763.79 Largest Contract To Dite J	
	Date 150.000.000.00
Insurance Safety Financial Financial Surety Libgation Approvals Submission Log Call Log Project history References Conta	Contacts Attachments
Insurance	Safety Financial Financial Surety Litigation Approvals Submission Log Call Log Project History References User ID First Name Last Name Prove # E-Mail

The Contacts tab is used to maintain all relevant subcontractor contacts. Selecting a contact opens the PM JSP Contact Maintenance screen and all relevant information may be entered/edited.

Attachments - Tab

Subcontractor Pre	qualificatio	on					Upload Mult	tple Add/Upload New Show M	Mapping Add Attachment ESign Documents	Bluebeam Review Back To Log 🛛 👔 🕯
CMiC Field Menu						Subcontract	or Prequalification			
Search Go	Code	A 1GARDEN		Tax ID	852666555		Pregualification Status	Review Complete 🗸 🗸	Insurance Approval Level A	
	Company	A IGARDEN Subcontractor Ve	ndor				Insurance Category	IV 🗸	Approval Status Subs Are Ap	pproved 🗸
Communication Management	Also Known As	GARDEN-A1					Aggregate Project Limit:	100,000,000.00	Single Project Limit: 10,000,000.	.00
🖶 🦲 Document Management	Legal Name	A IGARDEN Services Incorpo	rated				Joint Check	M		
Subcontractor Prequalification	Parent Corp.						CAP Approved	2	CAP Approved 09-09-201	4 25
Tuesday Blues Construction	Ctrl Business Partner	A1 CEMENT INDUSTRIES, -BE	NAME				Host Region		Lirgent	
- new application	Street	100. Garden Street		_			Last Approval Date	24-03-2015	Renewal Date 24-03-201	5 13
Gracious Living	Cuite	Cuito 500 Floor V					Worldfow Status	Ling herittad	Propulation and Propulation	a dead
A1GARDEN Subcontractor Vendor	Suite	Chinese					WORNIOW Status	Master C.	Frequer Required Frequer Rec	
- Applicants	City	chicago						Financial S	tatement 2	Come Shan M
Self Service	State	Ilinois	\sim	Zip	55555			OSHA 3	00A Form	Sample Insurance Cert.
Prequalifications Control	Country	US						Bonding Referen	ice Letter	Additional Comments
Workflow Notification	Contact	Mr.GARDENER								
Bid Management	Phone	(111) 222-3333		Fax	(111) 222-3334					
Gible Management	Toll Free			E-mail	ravi@cmic.ca	1				
🕀 🦲 Reports						Project	History Totals			
User-Defined Logs		Current Contract Amount 1	81,219,459.74	B	To Date 484,695.95		Remaining To Be Billed	180,734,763.79	Largest Cont	/act To Date 150,000,000.00
Security										
Subcontractor Reviews	General Us	er-Defined Fields II	isurance Safe	ty Financial	Financial Su	rety Litigation	Approvals Subr	nission Log Call Log	Project History References	Contacts Attachments 🖌
- new folder	Туре	Number N	ame	Rev. Number	Rev. Date	Description	Notes User	Status	Attachment	ESignings ESign Status Action
	Attachment 00	0000001 Attachmer	t1 0	History	15-11-2018		Terry Salandanan	SUBMITTED	Outlook and Skype.bd	<u></u>

The Attachments tab is for the attaching of applicable subcontractor documentation. Throughout the process of subcontractor prequalification, there will be a good number of documents required from the subcontractor. A subcontractor may attach an unlimited number of documents through the Subcontractor Self-Service screen.

Self Service

Overview – Prequalification Self Service

ompany nouaquatoro mormatori				
Federal Tax ID:		Year Company Founded		
Company Name:				
Also Known As				
Legal Name				
Parent Corp.				
Address: *		Contact		
Sute:		Phone		
City:		Toll Free		
State		Fax		
Zip		E-mail *		
Country				
	Plea	ise Enter your Federal Tax ID:		
anch Offices: (Enter your branch office(s) and bid contact	tames)			
	<i>µ</i>	This connection is not secure. Logins entered here could be	J	Add Ro
	k in: 1	compromised. Learn More		
dicate what region your company does wor	N III.			
dicate what region your company does wor	N III.	View Saved Logins		
dicate what region your company does wor Select All Regions Central Canada	US North Eastern	View Saved Logins	US South Western	
dicate what region your company does wor Select All Regions Central Canada Eastern Canada	US North Eastern	View Saved Logins	US South Western	

When logging into the Subcontractor Prequalification Self Service module, they will initially be prompted to enter their federal tax ID.

If they do not enter a valid federal tax ID and/or matching password, they will receive the following error message and no option to continue.

Subcontractor Qualification Questionnaire
You need a valid Federal Tax ID in order to Prequalify.
If you have any questions please contact the Prequalification Department

If they enter a new federal tax ID, they will then be prompted to enter a password (twice to validate entry) and then be able to continue with filling in the prequalification questionnaire.

Subcontractor Prequalification Questionnaire

Company Name and Locations

		All questions contain	equalification ed in this questionnaire are strict		
Company ł	Headquarters Information				
Federal Tax	(ID: 201002289	_	Year Company Founded	1988	
Company Na	me: SC Performance Contracting Corporation	on			
Also Know	/n As				
Legal N	Name				
Parent (Corp.				
Addre	4850 Keele Street		Contact	Fred Jones	
5	Suite:		Phone	(305) 555-5555	
с	City: Miami		Toll Free	(888) 525-5555	
St	tate Florida 🗸		Fax	(305) 555-5050	
	Zip 31206		E-mail	fred@scpcc.com	
Co	untry USA				
	ILCS. (Philer your branch office(s) and bit	contact names)			
Branch Name Address	Miami Accounting Office 4850 Keele St	d contact names)	Contact Grace Jones		
Branch Name Address Suite	Miami Accounting Office 4850 Keele St Suite 12	d contact names)	Contact Grace Jones		
Branch Name Address Suite City	Miami Accounting Office 4850 Keele St Suite 12 Miami	d contact names)	Contact Grace Jones Phone Toll Free		Remove Roy
Branch Name Address Suite City State	Miami Accounting Office 4450 Keele St Suite 12 Miami Florida	d contact names)	Contact [¶] Grace Jones Phone Toll Free Fax		Remove Rot
Branch Name Address Suite City State Zip	Miami Accounting Office 4850 Keele St Soute 12 Miami Florida V	J contact names)	Contact Grace Jones Phone Toll Free Fax E-mail grace@scpcc.co	m	Remove Rot
Branch Name Address Suite City State Zip Country	Miami Accounting Office 4850 Keele St Suite 12 Miami Florida 31206 USA	J contact names)	Contact [¶] Grace Jones Phone Toll Free Fax E-mal [¶] grace@scpcc.co	m	Remove Rot
Branch Name Address Suite City State Zip Country	Miami Accounting Office 4850 Keele St Suite 12 Miami Florida 31206 USA	J contact names)	Conlact [¶] Grace Jones Phone Toil Free Fax E-mail [¶] grace@scpcc.co	m	Remove Roi Add Roy
Branch Name Address Suite City State Zip Country	Miami Accounting Office 4850 Keele St Suite 12 Miami Florida 31206 USA		Conlact [¶] Grace Jones Phone Toil Free Fax E-mail [¶] grace@scpcc.co	m	Remove Rot Add Roy
Branch Name Address Suite City State Zip Country	Miami Accounting Office Mismi Accounting Office 4850 Keele St Suite 12 Miami Florida 31206 USA 14 region your company doe	es work in: `	Contact [¶] Grace Jones Phone Toll Free Fax E-mai [¶] grace@scpcc.co	m	Remove Rot Add Rov
Branch Name Address Suite City State Zip Country	Miami Accounting Office Mismi Accounting Office 4850 Keele St Suite 12 Miami Florida 31206 USA 14t region your company doe legions	es work in: `	Contact [¶] Grace Jones Phone Toll Free Fax E-mail [¶] grace@scpcc.co	m	Remove Rot Add Rot
Branch Name Address Suite City State 7 Zip Country	Intersection of the set of the se	s work in: US North Eastern	Contact [¶] Grace Jones Phone Toll Free Fax E-mail [¶] grace@scpcc.co	m	Remove Rot Add Rov
Branch Name Address Suite City State Zip Country	Miami Accounting Office Miami Accounting Office Miami ASSD Keele St Suite 12 Miami Florida J1206 USA hat region your company doe tegions tda ada	s ontact names) s work in: US North Eastern US North Vestern US North Western	Contact [¶] Grace Jones Phone Toll Free Fax E-mal [¶] grace@scpcc.co	m US South Western V York Region Toronto	Remove Rov

Self Service – Page 1 – Office and Company General Information

The first page of the questionnaire requires an applicant to maintain information such as company, contact, branch, and region of work. The mandatory fields are marked with a triangle icon (**¬**) and must be entered by the applicant. New rows may be added if required to maintain more than one branch office. Click [**Next**] to go to the next page when all the mandatory information has been entered.

Once all mandatory fields have been entered, applicants may use [**Save Draft**] on the top right corner of the page to save their work, should they prefer to return at a later time to complete their application.

License, Trade, and Business Status

License Information	nation 1: Enter your company's contr	ractors license information			Data Fusina	
Alaska		Class		cense number	Bate Expire	Remove Row Add Row
			Minority Business Enterp	rise Status:		
			🗆 NA	Class 01	Architectural	
			Concrete	Customer	Design	
			Electrical	General Subcontractors	Government	
			Government	Heating Ventilation and Ai	ir 🔲 Material Supplier	
			Mechanical	Medical/Hospital	Metal	
			Plumbing	Retail Stores - Clothing	Retail Stores - Groceries	S
			Roofing	Taxation Agencies	Trucking and Delivery	
			Union	Warehousing of Goods	SCA	
our firm signatory to any unions?	Yes No		Other Other			
de Information:			Certifying Agen	icy Names:		
		Remove Row				A Remove
		Add Row				Add

Self Service – Page 2 – General Information including Licenses, Trades, and MBES Status

The second page has a General Information section where the license information of the applicant can be entered. This page requires that at least one trade is selected from the available list. If any minority status is selected, then it is mandatory to select a certifying agency as well from the list.

License	Information: Enter yo Authority	our company's contract	ors license information Class		320	License Number 065FL-C	Date Expire	Remove Row Add Row
our firm signatori	ry to any unions? T	V No			Minority Business Ente NA Concrete Electrical Mechanical Plumbing Roofing Union Other	arprise Status: Class 01 Customer Heating Ventilatior Medical/Hospital Retail Stores - Clo Taxation Agencies Warehousing of G	Architectural Design actors Government and Air Material Suppler Material Stores - Groceries s Trucking and Delivery isoods SCA	s
ade Inform	nation:				Certifying Age	ency Names:		
0110 - Maintenar	nce of Concrete Forming and A	Accessories	A	Remove Row				A Remove
0100 - Maintenar	nce of Masonry		A	Remove Row				Add
7329 - Cleaning	and Waste Management			Remove Row				
319 - Installatio	n		A	Remove Row				
0000 - Electrical			A	Remove Row Add Row				

Self Service – Page 2 Trade Information Sample

Find: 9	6 Go Close Accept]
<< P	rev Set 1 - 50 of 62 V Next Set >>	
Code	Name	
0000211	CMIC Miscellaneous	
002	Site Office CSI	
0173113	Application	
017316	Erection	
017319	Installation	
017323Q	Bracing and Anchoring	
017326	Existing Products	
017329	Cleaning and Waste Management	
017400	Closeout Procedures	
017401	Setup Procedures	
030110	Maintenance of Concrete Forming and Accessories	
030120	Maintenance of Concrete Reinforcing	
030123	Maintenance of Stressing Tendons	

Trade Information pop-up window

The Trade Information pop-up window is populated from the system. Applicants are required to select all those that apply to their companies. The system requires that a minimum of one trade is selected by the applicant.

Insurance and Safety Information

Insurance Info	ormation						
NOTE: Please revie	w the attached Attachment A	- Insurance Requirements to	verify whether or n	ot your company meets In	surance requirements. If you	r policy does not meet	our
requirements plea IMPORTANT!! Pleas	se mark up the Attachment A e send a copy of your current	A to reflect any differences be it Insurance Certificate.	tween your policy a	nd our requirements.			
Insurance Broke	er Name: All State Insurance Co	orporation			GL Expiration	Date: 01-Aug-2020	0
We have reviewed th	e attached documents and we fu	IIv meet the Insurance Requireme	nts Ves No				-
If you have checked	No, then please check from the	list below, the Insurance Requirer	ents you DO NOT MEE	r.			
GL Limits per d	occurence are only \$1M with no l	Umbrella/Excess Policy.					
Aggregate limit	s do not apply separately per pro	oject. (Unless Aggregate + Umbre	la Limits are greater th	in \$5M)			
Additional Insu	red Endorsement does not cover	r completed operations.					
Mold Coverage	e in GL Policy or Separate Pollutio	n Liability Coverage.					
Additional losu	red Endorsement does not includ	le primary wording					
	red Endorsement does not includ	te prindry wording.					
Insurance C	omments:						.i
Insurance C Safety Inform Does your company Does your company Do you hold site safe	ation (OSHA Form 3) have a written field based safety have a substance abuse policy? tv meetinos?	00 Must Be Attached) y program? ⊻ Yes □ No ⊻ Yes □ No ∀ Yes □ No. Ht	w Often?				.1
Insurance C Safety Inform. Does your company Does your company Do you hold site safe Do you conduct proje	ation (OSHA Form 3/ have a written field based safety have a substance abuse policy? ty meetings?	00 Must Be Attached) y program? ∑ Yes □ No ∑ Yes □ No ∑ Yes □ No Hd ∑ Yes □ No Hd	w Often?				a.
Insurance C Safety Inform Does your company Does your company Do you hold site safe Do you conduct proje Who follows up on th	ation (OSHA Form 3) have a written field based safety have a substance abuse policy? ty meetings? sct site safety inspections?	00 Must Be Attached) y program? Yes No Yes No Yes No Yes No Ho Yes No Ho	w Often?				ii.
Insurance C Safety Inform Dees your company Dess your company Do you conduct proj Vho holl site safe Do you conduct proj Who follows up on th Year ¹ 2018 2017 2016	ation (OSHA Form 30) have a written field based safety have a substance abuse policy? ty meetings? set site safety inspections? test hspections?	00 Must Be Attached) y program? Yes No Yes No Yes No Yes No Yes No Herricological RIR	w Often?	FWH ¹ 0 0	ANE ¹ 0 0	Fatalities	is.



The insurance and safety information can be entered using page 3. The Insurance Broker Name, Expiration Date, and the 'Agreement of Fulfillment of the Insurance Requirements' checkbox are mandatory. If selecting "No", then there are additional fields which become editable and applicants may check the appropriate boxes.

The lower section presents the safety information questionnaire, where all of the fields are mandatory. The legend at the bottom provides a detailed description of the abbreviated column headers such as EMR, ANE, etc.

				Save	e Draft Previous Page 4 of 7 Next
	Subcontract	or Prequali	fication Question	naire	
	All ques	tions contained in this quest	onnaire are strictly confidential.		
Surety Information					
Is your Company Bondable?	Yes 🗌 No				
Surety Company	Bond State Surety Co		\$ 0 - \$	100 K 35.00%	
Broker Name	Global Bonds Co		\$ 100 K -	\$ 500 K 25.00%	
Phone	(999) 999-9998		\$ 500 K	- \$ 1 M 10.00%	
Single Project Bonding Capacity	1,750,000	.00	\$ 1 M -	\$ 2 M 10.00%	
Aggregate Project Bonding Capacity	5,750,000	.00	\$ 2 M -	\$ 5 M 20.00%	
Current amount under bond today	2,500,000	.00			
inancial Information					
Legal Entity Type		De veu heue D	R Number? Ven Die Number	123	
Year Company Founded 1988	·	Do you have b	D&B Pavdex No	456	-
Fiscal Year End Date			0.01.0700.000		
Subsidiary Names: 1. Atlantis Construction Co			Previous Company Names: 1.	New Era Construction	
2.			2.		
3.			3.		
4.			4.		
5.			5.		
Parent Organization					
Has Your F	irm Ever Filed Bankruptcy?	Yes 🗹 No	If Yes, explain:		
Accountant:			Financial Format:		
Subcontractor is require <u>NOTE:</u> Audited financial statements a	d to send a financial statemen nd a reference letter from you	IT. I his document be held Ir bonding company will	a in strict confidence for the purpose not be required for subcontractors the	hat will be performing w	requalification only. ork under the value of \$50,000.
Amount Line Of Credit 7,500,000.00					
Against Line Of Credit 1,250,000.00					
Highest Dollar Project 8,500,000.00			Questions regarding Financial Infor	mation, please contact t	the Prequalfication Department
Average Project Size 1,350,000.00					
1					1
Company Officers:					
Company Officer Name	Litle	Action			
loary smin	put.	Add Row			
L		AVGROW			
				Save	e Draft Previous Page 4 of 7 Next

Self Service Page 4 - Surety, Financial Information and Company Officers

The Surety and Financial Information page allows subcontractors to enter vital financial details of their companies. The Surety Information section maintains the single and aggregate project limits allowed for the company. The Financial Information section allows storing the D&B number if applicable. The appropriate legal entity type may be selected from the list. Mandatory requirements such as the D&B number, amounts of credit, etc. are marked with a triangle icon (**\)**. Applicants must enter those values before proceeding to the next page.

Financial Contacts, Litigation Information, and References

Financial Information								
Enter information for a contact in your company who can ansi	wer specific question	ns about your Fir	nancials:					
Contact Name: Danny Fernandis					Phone	2165689999	Fax	
Title/Position: Accountant					E-mail	test@cmic.ca		
Bank Reference:								
Name of Bank: Canadian Company					Phone	2169869999		
Contact Name: Melissa Brown					Fax			
Title/Position:					E-mail	test@cmic.ca		
Litigation Information		If ves, please e	enter a brief descri	ption				
Any current litigation with Owners or General Contractors?	Yes No							
Any judgements against in the last 3 years?					_			
Any Principals of your company in litigation?								
Any paid liquidated damages?					_			
Any labor law violations?	Yes No							
Have you ever defaulted on a contract?								
Ever failed to complete a contract?					_			
Have you ever been terminated from a contract?	Yes 🗹 No							
Have you ever had your license revoked or suspended?	Yes 🗹 No				_			
· · · · · · ·								
mpany				Contact				
Name:				Name:			_	Remov
Idress				E-mail				Row
City	State		Zip	Phone				
Mame:				Contact Name:				
ddress				E-mail				Remov Row
City	State		Zip	Phone				
mpany				Contact				
idress				F-mail	_			Remov
		_	-		_			Row

Self Service Page 5 – Financial Contacts, Litigation Information, and References

Subcontractors are required to provide their contact information for the finance department and the banking references. The middle block requires litigation information of the subcontractor, if any. All questions are mandatory in this section. References may be entered in the last section as required.

Attachments and Submission

user-Denned Fleids		
		Header 1
	comments	
Comment	s	
	1	Header 2
E Ma	il taat@amia.ca	header z
L-Md	in testigenic.ca	Compliance
Acknowledge that you have a	reviewed our Subcontractor code	of conduct, that you accept its terms and will adhere to its principles, and that you will report any suspect violation of the code
·····		known to you.
	Cut an	d Paste the following URL to access the Supplier Code: https://cmic.ca/.
Acknowledgement Date	e 14-Aug-2019	Acknowledge Date Forms 23-Aug-2019
ACK DATE ADF	23-Aug-2019	File Attachments 1
The following attachments ar Signed W9 form Sample Insurance Certificate DSHA 300 A forms for last 3 y Leference letter from bonding (hird party prepared financial ihould you need to send any o	e requested to be submitted at the including the endorsements ears (note - these are different the agent if your firm is bondable statements if wishing to do scop of these at a separate time, they	e same time as the prequalification. At least one of them must exist before you will be able to submit the form to us. an the 300 forms) es of work greater than \$50,000. can be e-mailed or faxed directly to our Prequalification Department.
The following attachments an signed W9 form Sample Insurance Certificate 2514 300 A forms for last 32 Reference letter from bonding third party prepared financial Should you need to send any o lease click Add Row, add a de	e requested to be submitted at the including the endorsements ears (note - these are different the agent if your firm is bondable statements if wishing to do scop of these at a separate time, they escription such as "insurance cert	e same time as the prequalification. At least one of them must exist before you will be able to submit the form to us an the 300 forms) es of work greater than \$50,000. can be e-mailed or faxed directly to our Prequalification Department. and then the browse button to attach documents to your application.



Against Line Of Cr Highest Dollar Project	edit 1,250,000.00	Questions rega	arding Financial Information	, please contact the Pregualfication	n Department
Awar	ded 8,500,000.00				
Average Project	Size 1,350,000.00				
Company Officar					
company onicers	Company Officer Name	Title			
	Gary Smith	Mr.			
Financial Informa	tion				
Enter information for a cont	act in your company who can answer spec	ific questions about your Financials:			
Contact Name:	Danny Fernand	dis	Phone	2165689999	Fax
Title/Position:	Accountant		E-mail	test@cmic.ca	
Bank Reference:			-		
Name of Bank:	Canadian Com	pany	Phone	2169869999	
Contact Name:	Melissa Brown	1	Fax	test@enia.ea	
Title/Position:			E-mail	test@cmic.ca	
Litigation Informa	ation		If yes, plea	se enter a brief description	
	Any current litigation	with Owners or General Contractors?	Yes No		
	Anvi	udgements against in the last 3 years?	Yes No		
	Any P	rincipals of your company in litigation?	Yes No		
		Any paid liquidated damages?	Ves No		
		Any labor law violations?	Yes No		
	н	ave you ever defaulted on a contract?	Yes No		
		Ever failed to complete a contract?	Yes No		
	Have you	ever been terminated from a contract?	Yes No		
	Have you ever had	I your license revoked or suspended?	Yes No		
References					
User-Defined Fiel	ds				
		Heade	r 1		
Com	ments comments				
		Heade	r 2		
	E-Mail test@cmic.ca				
		Complia	ance		
Acknowledge that you h	ave reviewed our Subcontractor code	of conduct, that you accept its terr	ms and will adhere to its p	rinciples, and that you will report a	ny suspect violation of the code
	Cutan	known to Paste the following URL to access	you.	tionic cal	
Acknowledgeme	of Date 14 AUG 2019	a rusto die following one to acces	Acknowledge Date For	ne 23 AUG-2019	
Acknowledgeme	TE ADE 22 AUG 2010		File Attacking	10 20-00-2010	
ACK DA			In state of the st		

Self-Service Page 7 - Submission

Subcontractor Qualification Questionnaire Submitted	
We will review your Prequalification request and will contact you if any further information is required. If you have any questions please contact the Prequalification Department	

Self Service – Submission confirmation

The subcontractor applicant is now available to internal users for amendments, review, and approval via workflow.

Prequalification Setup

Key Integration Points

CMiC Workflow

- Streamline the approval and renewal process.
- Define approvers in the prequalification front end by type.

Business Partner Maintenance

• Manage partner attributes in either screen.

Subcontract Entry

- Assign the contract rating.
- Review aggregate and single project limits.
- Receive hard or soft warnings when exceeding limits.

Assign Bidders

• Use prequalification data to aid in the bidder selection process on the invitation to bid and bid packages.

Prequalification Control & Maintenance Options

Prequalification Control

- Define instructions and error messages.
- Define instructions and messages included within Workflow notifications.
- Select warnings vs. hard stops on single and project limit overages in Subcontractor Prequalification.

Log Builder

- Vendor Prequalification Applicants
- Vendor Prequalification Partners

Role Maintenance

- Assign Programs
- Assign Menu Items
- Assign Privileges
- Assign Field Security

Prompt Maintenance

- Update verbiage on headers, columns, tabs, and buttons.
- Assign at user and/or project level.

Prequalification Control

	Prequalification Control	^
	Subcontractor Prequalification Questionnaire	
Self Service Header		
	All questions contained in this questionnaire are strictly confidential.	
Self Service Header Sub		
Self Service Insurance	<	5.
	Do vou have D\&B Number?	
Report On Business		
	https://www.dubi.eeg/	
	ntd5//www.diibir.com/	
Report On Business Link		
Self Service Financial Statement	 <td></td>	
	Questions regarding Financial Information, please contact the Prequalification Department	
Self Service Financial Information Questions		
	You need a valid Federal Tax ID in order to Prequalify. If you have any questions please contact the Prequalification Department	
Self Service Error Page		
	The Tax ID or Password that you entered is not valid.	
Self Service Password Error Page Text		
Sen Service rassivora entiti Page Text		
		-d 🗸

The Prequalification Control screen sets up the text seen in many of the Prequalification screens available. Default text is populated in the fields. However, all text as shown above is editable to suit individual needs.

The text entered in these fields supports basic HTML formatting, such as for bold, <u> for underline, etc.

Generally, there should be text in each and every field on the maintenance screen. If unsure what text is appropriate, paste in a copy of the description for the field, as that allows for tracking back to this screen when the text appears while using the application.

Control Flag to Make References Mandatory in Self Service

Subcontractor Pred	qualification	Sone UX [ະ ຄ
🕏 🗉 🗉 CMiC Field Menu	Prequalification Dept. E-mail	stephanie @cmic.ca	^
Search Go	First Workflow Renewal Notification E-mail Subject	Vendor Prequalification Renewal	
🖃 🚞 Project: Freshmart Office Building - Chicag		Dear Subcontractor:	^
Communication Management Document Management Subcontractor Prequalification Subcontractors	First Workflow Renewal Notification E-mail Body	Attached to a live to the prequalitation forms that we require to be updated on an annual basis. Your most recent prequalitation is about to expire and we need to have back from you quidy so that there is no dispution in an advise to soliciblish from you wire abounders to you. In order to make earth hat you company remains on a to blie with no scass, we ask that you respond to this request within the next 30 days. Otherwise, your firm will be blocked out of our approved sub lat until the prequalitation form as well as all of the below infomation is received and processed.	•
Applicants	Second Workflow Renewal Notification E-mail Subject		
Subcontractor Rating Setup Pregualfications Control	Second Workflow Renewal Notification E-mail Body	Dear Subcontractor:	Ŷ
Workflow Notification		We value the relationship that has developed with you and we look forward to continuing to work together on future opportunities. These future opportunities are subject to more stringent control measures though, as	
Bid Management Budget & Cost Management	Manual Renewal Notification E-Mail Subject	Prequalification Renewal	
B Site Management		Dear Subcontractor:	^
Reports	Manual Renewal Notification E-mail Body	Below is a link to the prequalification screen and a new password has been generated for you.	
E Carlos File Maintenance		Should you have any questions or you require assistance, please contact the Prequalification Department.	~
Security Security			
new folder		Please note that after you hit Submit you should receive a confirmation page. If you do not, please contact the Prequal team directly.	
	Self-Service Wait For Confirmation		
	Review Self-Service Application	-b>Please Review your data entered. If you need to make any corrections you may go back and do so. Once you are satisfied, please dick the Submit button at the bottom of this page. 	
	Project	Major project 2	
	Financial Document Type	Finandal Documents from Prequal	
		WARNING MESSAGE	^
		Disregard this message if you have entered a Purchase Order or are working on a Non-COMPACT project	
	Subcontract/CO Over Single Project Limit	You have entered a subcontract value greater than the Single or Aggregate Project Limit for this Subcontractor, Risk Management and your Regional Manager have been alerted.	×.
		Werning Only	
		WARNING MESSAGE	^
		Disensed this message if you have entered a Purchase Order or are working on a Non-COMPACT project	
	Subcontract/CO Over Aggregate Project Limit	an angle a farmer in the second	~
		In the new consistence consistence rows greated care on angle or eggregate respectively to the subcontract of Rowshite and your Regulate Haire Deciritation.	
	Classification Section Required		
	Display Financial Calculations in Self-Service		
	Self-Service (3) References are required.		
	Alternate Self-Service URL		
. /			×

The 'Self-Service (3) References Are Required' checkbox in the Subcontractor Prequalification Control screen is used to indicate whether references in Self-Service are mandatory or not. When the box is checked, all the fields in the first three sections of the References section of Self-Service are mandatory. Any additional references are not mandatory.

References				
Company Name:			Contact Name:	
Address			E-mail	Remove
City	State	Zip	Phone	
Company Name:			Contact Name:	_
Address			E-mail	Remov
City	State	Zip	Phone	
Company Name:			Contact Name:	
Address			E-mail	Row
City	State	Zip	Phone	
				Add Roy

Alternate Self Service URL

This field can be used to provide an alternate URL for external users, so that they do not have access to the client's internal server.

Subcontractor Rating Setup

Subcontractor Rati	ng Questionr	aire Setup			Save [2 🖿 🍙									
¢ 🗉 🗉 CMiC Field Menu		Subcontractor Rating Questionnaire Setup													
Search Go	SI	Start Scale 1 No. Of Scale Buttons (Max 10) 10													
Project: Freshmart Office Building - Chicag Project: Freshmart Office Building - Chicag	Display Order Number	Ind Scale 15 Question		Allow N/A	Question Weight	Action									
E 🔁 Document Management	1	Has your company managed to complete most project work within the alloted schedules?			10	+×									
B Cubcontractor Prequalification	2	How do you manage your work.			10	+×									
Applicants	3	Had either a state or the federal occupational Safety and Health Administration Cite serious violations and assess penalties again			10	+×									
- Self Service	4	Had either a state or the federal Environment Protection Agency (EPA) issue a Notice of Violation (NoV) and/or assess penalties a			10	+×									
Subcontractor Rating Setup	5	Had a period when your firm had employees without workers compensation insurance or state approved self-insurance?			10	+x									
Workflow Notification	6	Been a debtor in a bankruptcy case?			10	+×									
Bid Management	7	Filed for bankruptcy under any of the bankruptcy codes?			10	+×									
Budget & Cost Management	8	Had a business license or certifications been suspended?			10	+x									
E Che management	9	Had either a state or the federal Environment Protection Agency (EPA) issue a Notice of Violation (NoV) and/or assess penalties a			100	+x									
User-Defined Logs	10	Had a period when your firm had employees without workers compensation insurance or state approved self-insurance?			100	+×									
E Security	11	Been a debtor in a bankruptcy case?			100	+×									
E Subcontractor Reviews	12	Filed for bankruptcy under any of the bankruptcy codes?			100	+x									
new folder	13	Had a business license or certifications been suspended?			100	+×									
	14	How experienced were they with the work they performed?			100	+×									
	15	How well did they adhere to schedules?			100	+x									
	16	How timely were their responses to questions and requests?			100	+×									
	17	How clear was their communication?			100	+×									
	20	Had either a state or the federal occupational Safety and Health Administration Cite serious violations and assess penalties again			100	+×									
	21	How were they to cooperate with?			100	+×									
		Has the company managed to complete most project work within the allotted schedules?			100	+×									
					100	+×									
					100	+x									
					· · · · · · · · · · · · · · · · · · ·	+									

Subcontract Rating Questionnaire Setup

The Subcontractor Rating Setup screen is provided to allow customized rating questions to be used for rating subcontractor performance on contracts they have worked on.

NOTE: If the mobile application is not being used, use the Subcontractor Rating Setup menu on the CMiC Field Treeview, shown in the red box above.

Questions are designed with a scale factor such as 1 to 5. If the question should be allowed to be unanswered, the 'Allow N/A' flag must be checked on the question. When entering questions, both the Display Order Number and the Question Weight fields must be specified. To add additional questions, click the Add icon (\ddagger) and to delete any question, use the Delete icon (\times).

Sul	ocontractor Pred	qualifica	atior	n									Dut	Rating	Reset	self-se	stvice Par	ssword Prin	t Report Check Speling	Work	uw Save 🛛	E 6
\$ E E	CMiC Field Menu							Subco	ntract	or Pre	qualiti	ication									-	~
Search	60	Co	de A1GA	ARDEN			Tax ID	852666555		Prequa	lificatio	on Statu	s Revi	ew Com	olete	\sim	Insuranc	e Approval L	wel A 🗸			
		Compa	any A1GA	ARDEN Sub	contractor Vendor						rance Category 🛛 🗸 🗸							Approval St	tus Subs Are Approved			~
E Proj	ect: Freshmart Office Building - Chicago I	Also Known	AS GARE	DEN-A1					A	gregat	e Proje	ect Limii	: 100,0	00,000.0	10		Sin	gle Project Li	nit: 10,000,000.00			
	Document Management	Lecal N	ame A1GA	APDEN Sen	ices Incornorated						301	int Cher	* 🔽									
e 🔁 e	Subcontractor Prequalification	December 10									CAR	Innrous						CAR Appro	und 0.0-00-2014			
B	Subcontractors	Parent C	orp.				-				Chr /	hppiove						CAP Appro	09-09-2014			
	Tuesday Blues Construction	Ctrl Business Par	tner A1 O	CEMENT IND	USTRIESBP NAME		untitled - Me	zilla Firefox							_		х	Urg	ent			
	Gracious Living	St	reet 100,	, Garden Str	reet	-												Renewal [ate 24-03-2016	2		
	TES-V10 Applicant - Oct. 13- check t	s	uite Suite	e 500 Floor	V	(test4v10. 	cmic.ca:7785/cmictestv10x/Pm	ScRa	ting/S	Show	ScRat	ing.do	?scma	••••	⊎ ર	2 =	qual Requ	red Prequal Required	\sim		
	- Wellington Power Corp		City Chica	ago (1	Save							lose	^			Union				
	A1WORKS INC	St	ate Illing	ois	~			Subcont	racto	r Ratir	g				_						Open Shop 🚽	2
FI-C	And And En Subcontractor Vendor		atau 110)ate Completed	Pro	Project Contact Data Admin									Sample !	Insurance Cert.			
I TO	Self Service		10 9 05	CADDENED			Po		Poo	r .		Average Excel			xceller	t N/A			Additio	onal Comments		
	Subcontractor Rating Setup	Setup Cor		ILGARDENER			Has your com	pany managed to complete most			-				-							
	Prequalifications Control	Ph	Phone (111) 222-:		11) 222-3333		project work w	ithin the alloted schedules?	0	0	0	0	0	0	0	O C				-	ž	~
E ()	3id Management	agement Company Code	User-D	Defined Fi	elds Insuran	e 2.	How do you m	anage your work.	0	0	0	0 (0	0	0 0		Call Lo	g Project History	N	ferences	Contacts
👘 🛄 E	Budget & Cost Management		Project	ct Code		3.	Had either a s and Health Ad	tate or the federal occupational Safety ministration Cite serious violations and										To Date	Remaining To Be Billed	Rating	Controct Date	Action ^
🗉 🕒 🕄	Site Management	RVHQ1001	1381740)P 1	1381740P		assess penalt	ies against your firm?	<u> </u>	<u> </u>	~	~	~		~	~		0.00	210,000.0	1 6	07-01-2014	Rate It
	Reports	22	15107P	L	G 15107 project	4	Had either a s	tate or the federal Environment										0.00	17,598.1	J	09-02-2016	Rate It
	File Maintenance	RVHQ1001	161M	1	161M		(NoV) and/or a	issess penalties against your firm?			<u> </u>				<u> </u>			0.00	144,000.0	J	15-09-2016	Rate It
i 🗄 🦲 🗧	Security	ccc	1491523	3M 1	491523M	6	Had a period v	when your firm had employees without										587.06	6,987.94	1	20-02-2015	Rate It
🗉 🛄 😫	Subcontractor Reviews	22	CMPWP	P1 F	Project for CMPWP	0.	self-insurance	?	10	9	9	9					' I	0.00	4,000.0	J	26-04-2019	Rate It
<u>-</u> -	iew folder	22	JSPWPT	TESTO ji	s pwp test0	6.	Been a debtor	in a bankruptcy case?	0	0	0	0 0	DC	0	0	00		0.00	2,000.0	1	26-04-2019	Rate It
		RVHQ1001	1615464	۱ I	1615464 - sc rfp CRE/	TT 7.	Filed for banks	uptcy under any of the bankruptcy	0	0	0	00		0	0			4,783.33	30,216.6	1	15-08-2016	Rate It
		RVHQ1001	100001	1	00001 Name of the J	b	Had a busines	s license or certifications been	-	~	~	~			~			9,000.00	-1.0) (26-10-2017	Rate It
		RVHQ1001	100001	1	00001 Name of the J	6. B.	suspended?		0	0	0	0	50	0	0		2	0.00	45,000.0	3	18-08-2017	Rate It
		RVHQ1001	100001	1	00001 Name of the J	ıb 🖕	Had either a s	tate or the federal Environment										✓ 0.00	25,000.0	J	11-10-2016	Rate It
		RVHQ1001	100001	1	00001 Name of the J	b		C920								16,	764.00	0.00	16,764.0	1	02-11-2017	Rate It
		RVHQ1001	100001	1	00001 Name of the J	b		H689								19,	316.55	0.00	19,316.5	j .	02-11-2017	Rate It
		RVHQ1001	100001	1	00001 Name of the J	b		GAR101								-10,	00.00	0.00	-10,000.0	1	27-10-2017	Rate It

Sample Rating Questionnaire for a contract (History tab of the Subcontract Prequalification screen)

Subcontractor Ratings – Mobile Integration

Overview – Setup & Administration

Prequalification Management		Subcontractor Rating Questionnaire Setup				
arch	Display Order	Category	Weight	Start Scale	End Scale	Action
Project: Freshmart Office Building - Chicag		Quality	3			+×
Subcontractors		Experience	1			+×
Applicants		Teamwork	1			+×
Self Service Subcontractor Rating Setup	Financial	1.5			+×	
Subcontractor Rating Questionnaire Setup		Schedule	2			+×
Prequalfications Control		Communication	2			+×
Document Management		Safety	2			+×
Maintenance						+
Security		Questions for Communication Category				
- Review Moderation	Display Order	Question	We	right	Allow N/A	Action
	16	How timely were their responses to questions and requests?		100		+×
	17	How dear was their communication?		100		+×
		II.	0			+

Subcontractor Ratings Mobile functionality in Subcontractor Prequalification JSP module

NOTE: If the mobile application is being used, use the Subcontractor Rating Questionnaire Setup menu on the Prequalification Management Treeview, shown in the red box above.

This section provides details about setting up the user-defined rating categories and questions (e.g. quality, experience, communication, etc.) for Subcontractor Ratings (Mobile) in the Subcontractor Prequalification JSP module, shown above, and about monitoring reviews.

Assumptions:

- Category items will be fixed and defined by the client. These will not be changed once defined.
- Category weights should all be the same.
- Questions are fixed and defined by clients and will not be changed or altered in any way once defined.
- The scale starts at 0 and ends at 5.
- The ratings are not required for each question, therefore if the rating is null it should be skipped and does not impact the calculation.

NOTE: The Subcontractor Reviews functionality for monitoring reviews is also available in CMiC Field (JSP):

CMiC Field Menu					Review Moderation										
arch	41	Review ID	Subcontractor	Reviewer	Review Status	Overall	Quality	Experience	Teamwork	Safety	Schedule	Communication	Financia	Completed Date	
Project: Freshmart Office Building - Chicago II (P448957)	•	00000089	A1 CEMENT INDUSTRIES.	Mike Fernandes	DRAFT	3.5	0	0	0	0	0	0	0	03/20/2018	
Communication Management Document Management	•	00000088	A1 CEMENT INDUSTRIES.	Mike Fernandes	SUBMITTED	4.5	0	0	0	0	0	0	0	03/20/2018	
Subcontractor Prequalification Subcontractor Prequalification Subcontractor Prequalification Subcontractor Prequalification Subcontractor Prequalification Subcontractor Prequalification Subcontractor Prequalification	•	0000087	A1 Bricks Manufacturing Company	Mike Fernandes	SUBMITTED	3.2	0	0	O	0	0	0	o	03/16/2018	
	•	0000086	A1 Bricks Manufacturing Company	Mike Fernandes	SUBMITTED	2.7	0	0	0	0	0	0	0	03/16/2018	
Guero Defined Logs		0000085	A1 Bricks Manufacturing Company	Anand Badinger	SUBMITTED	3.3	0	0	O	0	0	0	o	03/16/2018	
Subcontractor Reviews	4	00000084	Frugger Technology	Anand Badinger	DRAFT	2.6	0	0	0	0	0	0	0	03/15/2018	
	4	0000083	A1MARBLE	Anand Badinger	SUBMITTED	3.9	0	0	0	0	0	0	0	03/15/2018	
	4	00000082	A1 Mechanical Services	Anand Badinger	SUBMITTED	3.6	0	0	0	0	0	0	0	03/14/2018	
	4	00000081	A1 Masons	Anand Badinger	SUBMITTED	4.6	0	0	0	0	0	0	0	03/14/2018	

Subcontractor Prequalification – JSP

CM <i>i</i> C			
DEVELOPMENT TOOL	.S	SOFTWARE V10	
CHOOSE A TOOL:	CHOOSE AN ENVIRONMENT:	CHOOSE A PRODUCT:	CHOOSE AN ENVIRONMENT:
• Treeview Builder	• testv10x	Enterprise Console	• testv10x
Query Builder	• pretestv10x	Enterprise Classic	• pretestv10x
Process Builder		Classic without treeview	
Workflow Monitor		Project Management	
Form Letter Definition		Timesheet Entry	
 Jasper Server / Analytics 		HR Self-Service	
Program Builder		Opportunity Management	
Simple Menu		Subcontractor Prequalification	
Report Parameters		-	-
Oracle Report Queue			
Server Logs			
Latest Server Log			
Catalog Builder			
Dashboard Builder			
	RUN DevTools »		RUN Software »
			Logout

The Subcontractor Prequalification JSP module can be launched using the CMiC Launch Page, as shown in the above sample of a CMiC Launch Page.

🗈 🗄 Prequalification Management		
rch Go	Display Order	
Project: Freshmart Office Building - Chicac		Quality
- Subcontractors		Experience
- D Applicants		Teamwork
Self Service		Financial
Subcontractor Rating Setup		Schedule
Prequalfications Control Workflow Notification		Communication
Document Management		Safety
Maintenance		
Security Subcontractor Reviews Review Moderation	Display	
Subcontractors	Urder	How timely were their responses to questions and requests?
	10	now unley were their responses to questions and requests?
	17	How clear was their communication?

Security Setup for Subcontractor Ratings Mobile

To grant a user access to the Subcontractor Rating Questionnaire Setup, Review Moderation, and Subcontractors screens (links framed above), use the Role Maintenance screen's Assign Menu Items option, shown below, to grant their JSP security role access to these screens:

Prequalification Manag	lement					12 🗈 🍙
Contraction Management	HCM_ADMIN	HR Administrator	N	🕲 🗙	Choose your action 🔽	
Search	HRMARJROLE	MARJ HRADMIN	Y	🛯 🗙	Choose your action 💌	
	IHCOLPRJ	IHCOLLP	Y	S 🔀	Choose your action 🗸	
Project: Freshmart Office Building - Chicago	IHMASTER	Irina's Role	Y	🛯 🗙	Choose your action 🗸	
Subcontractors	JDROLE	JDROLE	Y	😒 🗙	Choose your action 💌	
- Self Service	JSP-TIME	JSP Time Sheets	Ν	😒 🗙	Choose your action 🗸	
Subcontractor Rating Setup	LG_MASTER	LG_Master	Y	🛯 🗙	Choose your action 🗸	
Subcontractor Rating Questionnaire Setup	LINGSROLE	Ling Shi - QA Role	Y	😒 🗙	Choose your action 🗸	
Prequalifications Control	LUDMILA	Ludmila's Role	Y	😒 🗙	Choose your action 🗸	
Worklow Notication	MIKEPMJSP	MIKE PMJSP Role	Y	🛯 🗙	Choose your action	
E Maintenance	MISTY-JSP	Misty's JSP Security Role	Y	Si 🗙	Assign Users Assign Programs	
E Construction	MRROLE	Madhuri Role	Y	S 🗙	Assign Menu Items	
User Maintenance	MRTESTPMRO	MR TEST PM ROLE	Ν	Si 🗙	Assign Privileges Assign Field Security	
User Access	NAVCOLLAB	navcollabrator	Ν	😒 🗙	Choose your action 🗸	
Subcontractor Reviews	NAVMASTER	navmaster	Y	🕥 🗙	Choose your action 🗸	
	NEWROLE	new role	Ν	Si 🗙	Choose your action 🗸	
	NLROLE	Novi Test Role	Y	😒 🗙	Choose your action 🗸	
	OM_ADMIN	OM Administration	Ν	Si 🗙	Choose your action V	
	PM_ADMIN	PM Administration	Y	St X	Choose your action 🗸	

Framed in the screenshot below are the menu items for the Subcontractor Ratings Mobile screens:

Prequalification Management			D 12 6						
年回世 Prequalification Management	Add/Remove menu items from the EVERY	Add/Remove menu items from the EVERYTHING Role							
Search Go Poject: Frahmart Office Building - Chicag Subcontractors Subcontractors Subcontractor Raing Ocusetonaire Setup Prequatifications Control Workfow Volfication Bio Evance Subcontractor Raing Ocusetonaire Setup Subcontractor Raing Ocusetonaire Subcontractor Raing Ocusetonaire	Menu Item I Subcontractors Applicants Self Service Subcontractor Rating Setup Subcontractor Rating Setup Subcontractor Rating Castonnaire Setup Prequadistication Contractor Rating Castonnaire Setup Prequadistication Control Document Vanagement Document Vanagement Documents Documents Documents Manitemance Menu Mantenance Security User Access Subcontractor Reviews Review Identified Subcontractors Subcontractors		Select All Umselect All Update Back						

Subcontractor Rating Questionnaire Setup

🗉 🗉 Prequalification Management			Subcontractor Rating Questionnaire Setup											
earch Go	Display Order		Category	Weight	Start Scale	End Scale	Action							
- Chicag		Quality		3			+×							
Subcontractors		Experience	1			+×								
- D Applicants		Teamvork 1												
Subcontractor Rating Setup		Finandal 1.5												
Subcontractor Rating Questionnaire Setup		Schedule			+×									
Prequalfications Control		Communication	2			+×								
Workflow Notification		Safety	in the function of the functio											
Maintenance														
🖻 🦳 Security		Rating Questions for	Questions for Safety Category											
User Maintenance Role Maintenance	Display Order	Rating Category	w	eight	Allow N/A	Action								
User Access	9	Had either a state or the federal Environment Protectio	in Agency (EPA) issue a Notice of Violation (NoV) and/or assess penalties against your firm?		1		+×							
Subcontractor Reviews	contractor Reviews 10 Had a period when your firm had employees without workers compensation insurance or state approved self-insurance? 0.5 2 webwe Moderation 20 Had a beniod when your firm had employees without workers compensation insurance or state approved self-insurance? 20 Jul Had a beniod when your firm had employees without workers compensation insurance or state approved self-insurance? 20 Jul Had a beniod when your firm had employees without workers compensation insurance or state approved self-insurance? 20 Jul Had a beniod when your firm had employees without workers compensation insurance or state approved self-insurance? 20 Jul Had a beniod when your firm had employees without workers compensation insurance or state approved self-insurance? 20 Jul Had attract the first sector of the state or the state or the first sector of the state or the first sector of the state or the state or the first sector of the state or the s													
Subcontractors														
		20 Had either a state or the federal occupational Safety and Health Administration Cite serious violations and assess penalties against your firm? 2 🗹												

This screen is used to set up the rating categories, and where applicable, to set up rating questions for categories.

NOTE: By default, ratings are <u>not</u> required for each question. Therefore, if a rating is null, it is skipped and does not impact the calculation.

CMiC Field – JSP

This section contains details about the Subcontractor Ratings Mobile functionality and setup in the CMiC Field module.

CMIC FIELD				Flag as	Private Flag	as Public	: Returi	n To Review	er Show F	ilter S	end To Sp	readsheet Enter	r Query		
¢ ∃ ♥ CMiC Field Menu						Re	view Mo	deration							_
Search	•	Review ID	Subcontractor	Reviewer	Review Status	Overall	Quality	Experience	Teamwork	Safety	Schedule	Communication	Financial	Completed Date	~
Project: Freshmart Office Building - Chicago II (P448957)	•	00000089	A1 CEMENT INDUSTRIES.	Mike Fernandes	DRAFT	3.5	0	0	0	0	0	0	0	03/20/2018	1
Communication Management Document Management	4	0000088	A1 CEMENT INDUSTRIES.	Mike Fernandes	SUBMITTED	4.5	0	0	0	0	0	0	0	03/20/2018	
Bucontractor Prequeification Subcontractor Prequeification Budget & Cost Management Bor Reports Ste Management Bor Reports User-Defined Logs Bor File Maintenance Subcontractor Reviews Cost Moderation Subcontractors	•	0000087	A1 Bricks Manufacturing Company	Mike Fernandes	SUBMITTED	3.2	0	o	0	0	0	0	0	03/16/2018	
	•	00000086	A1 Bricks Manufacturing Company	Mike Fernandes	SUBMITTED	2.7	0	0	0	0	0	0	0	03/16/2018	
	•	0000085	A1 Bricks Manufacturing Company	Anand Badinger	SUBMITTED	3.3	0	o	0	0	0	0	0	03/16/2018	
	•	0000084	Frugger Technology	Anand Badinger	DRAFT	2.6	0	0	0	0	0	0	0	03/15/2018	
	4	0000083	A1MARBLE	Anand Badinger	SUBMITTED	3.9	0	0	0	0	0	0	0	03/15/2018	
	•	0000082	A1 Mechanical Services	Anand Badinger	SUBMITTED	3.6	0	0	0	0	0	0	0	03/14/2018	
	4	0000081	A1 Masons	Anand Badinger	SUBMITTED	4.6	0	0	0	0	0	0	0	03/14/2018	

Security Setup for Subcontractor Ratings Mobile - CMiC Field

To grant a user access to the Review Moderation and Subcontractors screens (links framed above), use the Role Maintenance screen's Assign Menu Items option, shown below, to grant their JSP Security Role access to these screens:

С	MIC FIELD						
\$ D D	CMiC Field Menu	FAR_MASTER	HR Master (JSP)	Y	🛯 🗙	Choose your action 🗸	
Search	60	HCM_ADMIN	HR Administrator	N	🛯 🗙	Choose your action 🔽	· · · · · · · · · · · · · · · · · · ·
bounding		HRMARJROLE	MARJ HRADMIN	Y	🕅 🗙	Choose your action 🗸	
🖃 🗁 🛙	Project: Freshmart Office Building - Chicago II (P448957)	IHCOLPRJ	IHCOLLP	Y	😒 🗙	Choose your action 🗸	
Ē.	Communication Management	IHMASTER	Irina's Role	Y	🕅 🗙	Choose your action 🗸	
	Document Management	JDROLE	JDROLE	Y	😒 🗙	Choose your action 🗸	
E E	Bid Management	JSP-TIME	JSP Time Sheets	N	🕥 🗙	Choose your action 🗸	
Ū.	Budget & Cost Management	LG_MASTER	LG_Master	Y	😒 🗙	Choose your action 🗸	
Ð.	Site Management	LINGSROLE	Ling Shi - QA Role	Y	X 🖉	Choose your action 🗸	
. .	Reports	LUDMILA	Ludmila's Role	Y	Si 🗙	Choose your action 🗸	
±.	File Maintenance	MIKEPMJSP	MIKE PMJSP Role	Y	N X	Choose your action	
	Security	MISTY-JSP	Misty's JSP Security Role	Y	× 🖉	Assign Users	
	Partners	MBBOLE	Madhuri Role	Y	N X	Assign Programs Assign Menu Items	
	Contacts	MRTESTPMRO	MR TEST PM ROLE	N	N X	Assign Privileges	
	Convert/Merge Partners and Contacts		nevcollabrator	N	N X	Assign Field Security	
	Change User I DAP Server	NAVMASTER	navcollabrator	×	Si ¥	Choose your action	
	Role Maintenance	NEWBOLE	novinaster	N	S 4	Change your action	
	User Access	NEW KOLE	New Tote	IN N	S ~	Choose your action 🗸	
	Project Roles	NEROLE	Novi Test Role	T N		Choose your action V	
	License Pools	OM_ADMIN	OM Administration	N		Choose your action 🗸	
	Subcontractor Reviews Review Moderation	PM_ADMIN	PM Administration	Y		Choose your action 🗸	
	Subcontractors	QATESTER1	QATESTER1	Y	X	Choose your action 🗸	
	_	RAJ1ROLE	Raj1role	Y	X	Choose your action 🗸	
		RAJMASTER	Rai's role		X	Choose your action 🗸	

Framed in the screenshot below are the menu items for the Subcontractor Ratings Mobile screens in CMiC Field:

CMIC FIELD			
CMiC Field Menu	RTI Maintenance	V	
Search	RTI Mapping	✓	
Device to Free based Office Building _ Obierry II (D440057)	RTI Error Log	✓	
Communication Management	RTI Log	V	
Document Management	File Upload	V	
E C Subcontractor Prequalification	Auto Cold Storage	 Image: A set of the set of the	
Bid Management Bid Management Bidget & Cost Management	Job Scheduler		
Gite Management	Security	~	
E C Reports	Partners	✓	
User-Defined Logs File Maintenance	Contacts		
E Contraction of the second se	Convert/Merge Partners and Contacts		
- Dartners	Licer Maintenance		
Contacts	Charge Lines L DAD Carrier		
User Maintenance	Change User LDAP Server		
Change User LDAP Server	Role Maintenance	×	
Role Maintenance	User Access	✓	
User Access	Project Roles	\checkmark	
License Pools	License Pools	\checkmark	
Subcontractor Reviews	Subcontractor Reviews	~	
Review Moderation	Review Moderation		
Subcontractors	Subcontractors	✓	~

Setup for Reviewer Weight by Project Role - CMiC Field

PM Roles					Add PM Role	Save Cancel	2 🗈 🍙							
CMiC Field Menu		Project Roles												
Search	Role	Description		Admin Req.	Key Player	Order Seq.	Eval Weight							
Project: New Kaiser Auditorium (T&M) (1000	1) ARCHITECT	Architect				3								
Communication Management Document Management	BID	Bidder												
Contractor Prequalification Contractor Prequalification Didget & Cost Management Site Management Cost Management Site Management Cost Second Cost Cost Second Cost Second Cost Cost Cost Second Cost Cost Cost Second Cost Cost C	BUSDEV	Salesman		✓		6								
	СМ	Construction Mgr				3								
	CUSTOMER	Customer				10								
	ENGINEER	Engineer				3								
	EQUIPSUPP	Equipment Supplier				21								
Contacts	ERECT	Erector				110	<u> </u>							
User Maintenance		Update Role C	EM											
Change User LDAP Server	View/Create/Update/Delete	All Objects View/Create/Update/Delete All Do	cument Types 🗌 Mobile	Springboard Ob	ojects 🗌 Defa	ult Email Notifica	ation Settings.							
User Access	Restricted View All for RFIs													
License Pools	Receive Owner Change On	der	Receive Partner RFI											
	Send Partner REI		Ecoward REI											

In calculating a subcontractor's overall weighted average rating, and weighted average rating per review category, the PM role of the reviewers will impact the calculation if reviewer weights have been set up for PM roles.

To set up reviewer weights for PM roles, use the Project Roles screen in the CMiC Field JSP module. As shown above, the Project Roles screen has the Eval Weight column to set the reviewer weight for each PM role. As an example, a project manager could have a weight of 3, and a site supervisor could have a weight of 1, resulting in the project manager's ratings impacting weighted averages 3 times as much.

Review Moderation – Screen

Prequalification Mar	nac	jemen	C			Flag a	as Private	Flag as Public	Return To Re	eviewer	Show Filter	Send To Spreadshe	et Enter Q	uery 🕻 🗈 🕯	à
Contraction Management					Re	eview Mod	eration								
Search Go	•	Review ID	Subcontractor	Reviewer	Review Status	Overall	Quality	Experience	Teamwork	Safety	Schedule	Communication	Financial	Completed Date	^
	 ↓ 	00000034	Eagle Investments Company	Glenda bb Stimpson	PRIVATE	1.7	0	0	0	0	0	0	0		
Project: Freshmart Office Building - Chicag Subcontractors	∢ [80000000	ASR Architectural Design Group	Data Admin	PRIVATE	3	0	0	0	0	0	0	0		
- Applicants	 I 	00000033	Veritas Incorporated	Glenda bb Stimpson	RETURN	-1	0	0	0	0	0	0	0		
Self Service	4 E					0	0	0	0	0	0	0	0		
Subcontractor Rating Setup	↓ [00000042	Parkdale Holdings	Glenda bb Stimpson		3	0	0	0	0	0	0	0		
	• [00000030	Gladstone Design/Build	Glenda bb Stimpson		2	0	0	0	0	0	0	0		
	4 E	00000029	Gladstone Design/Build	Glenda bb Stimpson		0.5	0	0	0	0	0	0	0		
Document Management	▲ [00000005	ABS Contractors Ltd	Data Admin		0	0	0	0	0	0	0	0		
B Security	↓ [00000027	Gladstone Design/Build	Glenda bb Stimpson		-1	0	0	0	0	0	0	0		
E Subcontractor Reviews	4 E	00000020	Eagle Investments Company	Glenda bb Stimpson		2.8	0	0	0	0	0	0	0		
- Review Moderation	< C	00000035	Crafty Manufacturing Company Ltd.	Glenda bb Stimpson		5.2	0	0	0	0	0	0	0		
	4 [0000036	Crafty Manufacturing Company Ltd.	Glenda bb Stimpson		5.5	0	0	0	0	0	0	0		
	4 C	00000046	Aetna Insurance	Data Admin		0	0	0	0	0	0	0	0		
	4 E	00000043	AXIS Technologies	Glenda bb Stimpson		7	0	0	0	0	0	0	0		
	4 E	00000032	Veritas Incorporated	Glenda bb Stimpson	RETURN	4	0	0	0	0	0	0	0		
	4 [00000014	Gladstone Design/Build	Amanda Matthews		3	0	0	0	0	0	0	0		

This screen is updated by changes made in the Mobile app.

The features of this screen are:

- A log view of all the reviews in the system. Initially the reviews are taken from the Subcontractor Prequalification Project History > Rate It link
- On drill-down, it provides a detailed view of the review with the option to "Flag as Private", "Flag as Public", and "Return to Reviewer".
- The "Flag as Private" option makes the review visible only to the moderator.
- The "Return to Reviewer" option allows the reviewer to modify their response and re-submit.

Subcontractors - Screen

						[]]]]	////////					
Prequalification Management				Subco	ontractors							
Search Go	Subcontractor ID	Subcontractor Name	#Reviews	Overall Rating	Overall Rank	Quality	Experience	Teamwork	Safety	Schedule	Communication	Financial
	A1BRICKS	A1 Bricks Manufacturing Company	4	3.3	25	2.8	3.5	3.4	3.7	2.8	3.4	3.7
Project: Freshmart Office Building - Chica	g A1CEMENT	A1 CEMENT INDUSTRIESBP NAME	2	4.5	18	5	5	4	5	3.5	4.3	5
Subcontractor Rating Setup Subcontractor Rating Setup Subcontractor Rating Questionnaire Setup	A1FLOOR	A1 FLOOR MAKER BP Name	1	3.2	27	2.5	4.5	1.5	4	3	2	5
	A1GARDEN	A1GARDEN Subcontractor Vendor	5	4.2	19	4.5	4	4.2	4.7	3.3	4.3	4.6
	A1MARBLE	A1MARBLE	1	3.9	20	2.5	4	4.5	4	4	4.3	3.8
	A1MASONS	A1 Masons	2	4.6	17	4.8	4	4.8	4.9	4.3	4.4	4.8
Workflow Natification	A1MECH	A1 Mechanical Services	1	3.6	22	3	4	3	4.5	3.5	3.3	4.2
Document Management	A1STEEL	A1 Steel Mill	1	3.5	24	4	4.5	4.5	3.5	3.5	3.5	0.8
E C Maintenance	ABSCONT	ABS Contractors Ltd	2		1							
E Curity	ACCESSEN	Access Engineering	3	3.6	22	3.5	2.7	4	4.2	3.5	3.1	4,4
E C Subcontractor Reviews	AETNA	Aetna Insurance	1		1							
Subcontractors	ASR	ASR Architectural Design Group	11	3.3	25	3.8	3.3	2.3	4.2	2.1	3.1	4.6
-	AVIS	AXIS Technologies	10	3.2	27	24	2.8	23	3.8	3.2	3.1	47

This screen shows a log view of subcontractors along with their ratings. It is important to note that zeros will not impact the subcontractor's score. It too is updated by changes made in the Mobile app.

Overall Rank

The overall rank for subcontractors is based on their overall rating in relation to that of the other subcontractors.

In case of ties, the tied subcontractors get the same rank, and the ranks that would have been used if there were no ties are not used. For instance, if three vendors are tied at rank 4, then all three get rank 4 and there is no rank 5 and 6, and the next subcontractor gets rank 7. Note that this is how the Olympics handles ties. If two teams tie at first:

• both get gold

- no one gets silver
- third best gets bronze

NOTE: Inline filtering does not affect overall rank values, so the overall rank values shown for a subset of subcontractors when an inline filter is in use are the values that would be shown for the full set of subcontractors when no filter is used.

Addendum

Prequalification Required Indicator

			Subo	ontracto	r Prequalification				
Code	AIGARDEN	Tax ID	852666555	<u>≞</u>	Prequalification Status	Review Complete 🗸	Insurance Approval Level	A 🗸	
Company	A 1GARDEN Subcontractor Vendor				Insurance Category	IV 🗸	Approval Status	Subs Are Approved	\sim
Also Known As	GARDEN-A1				Aggregate Project Limit:	100,000,000.00	Single Project Limit:	10,000,000.00	
Legal Name	A 1GARDEN Services Incorporated				Joint Check				
Parent Corp.					CAP Approved		CAP Approved	09-09-2014 🔯	
Ctrl Business Partner	A1 CEMENT INDUSTRIESBP NAME				Host Region		Urgent		
Street	100, Garden Street				Last Approval Date	24-03-2015 🔯	Renewal Date	24-03-2016	
Suite	Suite 500 Floor V				Workflow Status	Unsubmitted	Pregual Required	Prequal Required 🔽	
City	Chicago					Master Subco	ontract 🗹	Prequal Required Union	
State	Ilinois 🗸	Zip	55555			Financial Stat	tement 🗹	Prequal Required On Post Open Shop	\checkmark
Country	US					OSHA 300/	A Form 🗹	Not Applicable arance Cert.	
Contact	Mr. CARDENER					Bonding Reference	Letter	Additional Comments	
Contact	MI. GARDENER								
Phone	(111) 222-3333	Fax	(111) 222-3334						
Toll Free		E-mail	ravi@cmic.ca						

Subcontractor Prequalification screen

The Prequal Required field has a drop-down box with three options:

• **Prequal Required** - To indicate that prequalification is required as per previous functionality. In this case, if hard stop options are used to highlight that the project or aggregate limits are being exceeded, they will continue to prevent subcontracts and change orders from being written for unqualified vendors.

The security privilege 'SC Prequal. - Issue Contracts To Non-Qualified Vendors' will continue to function as it did before with this option.

• Prequal Required on Post

- This selection will allow subcontracts and subcontract change orders to be written even if the project or aggregate limits are being exceeded, but when it is posting time, they will be revalidated for prequalification. This option allows users to start entering subcontracts/change orders prior to prequalification, with limits that are monitored through hard stops. On saving, the program treats the record as though it was monitored through limit warnings only warning messages for the limits are displayed. However, if the user tries to post the record, the hard stop messages will be displayed.
- If the security privilege 'SC Prequal. Issue Contracts To Non-Qualified Vendors' is not checked for the user when this option is in use, the subcontract or subcontract change order will still be created but on attempting to post the record, a message will be displayed to the user informing that the vendor requires prequalification.

• Not Applicable – means that prequalification is not required, so there are no warnings or stops when entering and saving subcontracts/change orders.

Prequalification Limits at Controlling BP Level

Subcontractor prequalification limits set at the controlling business partner level can be used to apply to the lower level business partners when subcontracts and subcontract change orders are written.



To accomplish this, the Project Management Systems Options checkbox 'SC Prequalification Limits on Controlling BP' was introduced.

When unchecked (default setting), the system will use the single project limit and aggregate project limit that is set on the prequalification subcontractor record to validate any subcontracts and subcontract change orders that are written for that subcontractor. This is the standard functionality.

When the PM System Options box is checked, this setting defaults to any new applicant records created in the prequalification Applicants screen, in the checkbox 'Override with Ctrl BP Limits', and will be pushed to the Subcontractors screen when approved.

Subcontractor Prequal	lificati	on						DnB Rating Res	et Self-Service Password P	int Report Check Spell	ing Workflow Save	₽ ⊑ ♠
¢ ⊟						Subcontra	ctor Prequalification					
Search Go	Code [®]	A 1GARDEN		Tax ID 852	666555	<u>ا</u>	Prequalification Status	Review Complete 🗸 🗸	Insurance Approval Level	A 🗸		
Project Freehmart Office Building Chicar	Company	A 1GARDEN Subcontract	tor Vendor				Insurance Category	IV 🗸	Approval Status	Subs Are Approved		\sim
Communication Management	lso Known As	GARDEN-A1					Aggregate Project Limit:		Single Project Limit:		Override w	ith Ctrl BP Limits
Document Management	Legal Name	A 1GARDEN Services Inc	orporated				Joint Check				1	
Subcontractor Prequalification	Parent Corp.						CAP Approved		CAP Approved	09-09-2014		
Tuesday Blues Construction Ctrl Busin	iness Partner	A 1 CEMENT INDUSTRIE	SBP NAME				Host Region		Urgent			
- new application	Street	100, Garden Street					Last Approval Date	24-03-2015	Renewal Date	24-03-2016		
TES-V10 Applicant - Oct. 13- checi	Suite	Suite 500 Floor V					Workflow Status	Unsubmitted	Pregual Required	Pregual Required	~	
A1GARDEN Subcontractor Vendor	City	Chicago						Master S	ubcontract 🔽			Union
Applicants	State	Ilinois	~	Zip 555	55			Financial	Statement 🗹		Open	Shop 🗹
Subcontractor Rating Setup	Country	US	Lances of Control of C					OSHA	300A Form 🖌		Sample Insurance	Cert.
Prequalfications Control	Contact	Mr. GARDENER						Bonding Refer	ence Letter 🗌		Additional Com	ments
Workflow Notification Bid Management	Phone	(111) 222-3333		Fax (11	1) 222-3334							
🖲 🦲 Budget & Cost Management	Tol Free	(11) 111 0000		E-mail ravi	Remic ca							
Site Management	Torrice			E mai Tavi	gennered.							
User-Defined Logs	0	urrent Contract Amount	181 219 459 74	Bill T	Date 484 695 95	Projec	Remaining To Be	Biled 180 734 763 79		Largest Contract To	Date 150 000 000	00
E Constantes			101/223/1030/1	011			renaring to be			congest contract ro	200,000,000	
Subcontractor Reviews	eral Use	er-Defined Fields	Insurance Safe	ty Financial	Financial Sure	ty Litiga	tion Approvals	Submission Log	Call Log Project His	tory Reference	s Contacts	Attachments
new folder					Header	1						
		User D	efined Information									
		Comments										
					Header	2						
		E-Mail a 1gard	len@unicodemail.c									
	Compliance											
Acknow	Acknowledge that you have reviewed our Subcontractor code of conduct, that you accept its terms and will adhere to its principles, and that you will report any suspect violation of the code known to you.											
	Cut and Paste the following URL to access the Supplier Code: https://cmi.ca/.											
	Acknowl	eogement Date	200 HB			Adknow	ledge Date Forms 21-0	08-2019 4 0				
	A	ICK DATE ADF 1 21-08	-2019 20				Hie Attachments 1 25					

This checkbox becomes visible for applicants and subcontrators alike, only when the PM Systems Option checkbox is checked.

The 'Override with Ctrl BP Limits' checkbox will become enabled only for applicant or subcontractor records that have a controlling business partner value under the above condition.

When the box is checked for any business partners below the controlling business partner, the Single Project Limit and Aggregate Project Limit fields are read-only and the prequalification limits on the controlling business partner are used to validate any subcontracts and subcontract change orders written for these lower level business partners.

Subcontractor Pred	qualificat	ion						OnB Rating Res	et Self-Service Password P	rint Report Ched	Spelling Workflow Save	2 🗈 🏟
¢ ⊟ th CMiC Field Menu		Subcontractor Prequalification										
Search	Code	A 1GARDEN		Tax ID 852	666555	1	Prequalification Status	Review Complete 🗸	Insurance Approval Level	Α 🗸		
P Project: Freshmart Office Building - Chicac	Company	A 1GARDEN Subcontracto	or Vendor				Insurance Category	IV V	Approval Status	Subs Are Appro	ved	\sim
Demonstration Management	Also Known As	GARDEN-A1					Aggregate Project Limit:	100,000,000.00	Single Project Limit:	10,000,000.00	Override w	ith Ctrl BP Limits
Document Management Subcontractor Pregualification	Legal Name	A 1GARDEN Services Inco	orporated				Joint Check				× 1	
E C Subcontractors	Parent Corp.						CAP Approved		CAP Approved	09-09-2014	When the she	akhay
Tuesday Blues Construction	Ctrl Business Partner	A1 CEMENT INDUSTRIES	BP NAME				Host Region		Urgent		is unchecker	the
Gracious Living	Street	100, Garden Street					Last Approval Date	24-03-2015	Renewal Date	24-03-2016	limit fields are	open
TES-V10 Applicant - Oct. 13- checl	Suite	Suite 500 Floor V					Workflow Status	Unsubmitted	Prequal Required	Pregual Require	for user en	try
Applicants	City	Chicago						Master S	ubcontract 🗹			·
Self Service	State	Ilinois	~	Zip 555	55			Financial	Statement		Cample Top (rappe	Shop M
Prequalifications Control	Country	US						Bonding Refere	ence Letter		Additional Com	ments
	Contact	Mr.GARDENER										
Budget & Cost Management	Phone	(111) 222-3333		Fax (11	1) 222-3334	-						
Site Management	Tol Free			c-mail ravi	@cmic.ca							
Keports User-Defined Logs		Current Contract Amount	181 210 450 74	pi r	o Data 484 695 95	Project	t History Totals	Bilad 190 734 763 79		Largert Contr	act To Data 150 000 000	00
Ele Maintenance		content contract Amount	101,219,439.74	UN 1	0.0010 404,033.33		Kendining to be	blica 100,734,703.79		Largest Correc	Sec 10 Date 130,000,000.	
Subcontractor Reviews	🕈 General 🛛 U	ser-Defined Fields	Insurance Safety	Financial	Financial Sure	Litigat	ion Approvals	Submission Log	Call Log Project His	tory Refer	ences Contacts	Attachments
- new folder					Header	1						
		User De	fined Information									
		Comments										
			a		Header	2						
	E-mail a gartieneur ricoleniai. Uga											
	Acknowledge that you have reviewed our Subcontractor code of conduct, that you accept its terms and will adhere to its principles, and that you will report any suspect violation of the code known to you.											
		Cut and Paste the following URL to access the Supplier Code: https://cmic.ca/.										
	Advnov	wledgement Date	120			Advnowl	edge Date Forms 21-0	08-2019				
		ACK DATE ADF 21-08-	2019 💑				File Attachments 7 25					

When the override flag is unchecked for any business partners below the controlling business partner, it supercedes the PM Systems Option checkbox setting of checked. The Single Project Limit and Aggregate Project Limit fields become open for entry (if the record previously had individual limit settings these will show but can be overridden) and the prequalification limits validation for any written subcontract and subcontract change order is made against the individual subcontractor limits, allowing more flexibility under this PM Systems Option setting.

The Ctrl Business Partner field was added to the Prequalification screen as part of this implementation.

Frequently Asked Questions

Common Questions about Subcontract Prequalification

What is the actual process for subs to input their own info? Do they receive a password and login ID? Internally, how do we verify the info that is entered?

Subcontractors would access the Prequalification Self Service screen via a URL posted in an email or website. They would then be prompted for their tax ID. If the tax ID was found in the system, they would be prompted for a password (previously issued by you). If not, it would ask them to create and confirm a new password. Internal users would review and manage via a detailed Subcontractor Prequalification screen.

If information is updated or changed on a business partner, do we receive a notification? It's possible that a sub that was very qualified in 2011 may not be qualified at all in 2014. How do we manage that process and know what specific info has changed (safety record for example).

Notifications of changes, expiries, and other scenarios can drive workflows or appear on dashboards, queries, and reports.

Can we modify the required information fields to include all basic info we would need to make a decision on the first pass, rather than having to go back and ask them for more information after the fact? If info isn't required to start the profile, we will have a lot of follow-up with many subcontractors we really aren't interested in, just to get them off the Applicant Log.

This configuration would be addressed during the implementation of Subcontractor Prequalification.

Can the subcontractors check their prequalification status – e.g. is there an automated response built in to the program to notify them when reviewed, approved, or rejected, or can they access the status somehow by logging in to their file? Considering (in my opinion) many of the subs applying are not qualified or won't be selected based on other factors, it will be a waste of our and their time to spend a lot of effort with multiple notifications and follow-up.

If a subcontractor has been given access, they can log in and review/update their own information. Workflow can be configured to alert internal and external contacts of any situation with regards to approving or rejecting a qualification.

Is there an automated notification process when a profile has not been updated for a length of time? It would be great if they could be notified that their profile is outdated and if they don't respond, they get flagged or re-classed.

Yes. Workflow can be configured to alert both internal and external contacts on any time interval. It can also send reminders and update statuses automatically.

Can we query by project history, location, and/or prequalification status and if so, can we send the found set a bid invitation?

Using the filtering available in invitation to bid and bid packages, correspondence can be distributed to selected bidders.

Will modifying company information in this module change the information in business partners?

Yes. Numerous items are shared between Business Partners, Vendors, and the Subcontractor Prequalification screens. Updating need only be done from one location.

Are we able to run a report on renewal dates to determine who needs to be sent a request for renewal?

Yes. This can be accomplished by viewing the Prequalification log itself, or by printing from the log via CMiC's Microsoft Integration Pack (MIP) technology.

Dashboard, queries, and reports are also great options.

Is there any component to this module that will track when we request a prequalification from a subcontractor and how long we wait for their response?

Yes. Workflow could be configured to manage this process.

Is the Ranking and Prequalification Status drop-down menus modifiable?

This configuration would be addressed during the implementation of Subcontractor Prequalification.

Can we customize the Trade Information fields?

Yes. The available items are defined as market sectors in Project Management, and can be uniquely assigned to each subcontractor.

Are the certifying agencies customizable?

Yes. The available items are defined as classifications in Project Management, and can be uniquely assigned to each subcontractor.

Do you need a collaborator license to use this?

Subcontractor Prequalification requires a self-service license for subcontractor privileges when applying or maintaining their profile online. Please contact Michael Somer at CMiC for more details (416-736-0123 x266 or michael.somer@cmic.ca).

Does the system send out emails to the current business partner for them to update their files?

Yes. Workflow can be configured to notify business partners of a required update.

Does it create a duplicate record if the business partner already exists?

No.

Does the hard or soft stop capture the committed remaining or the total value?

Yes. Regardless of the hard or soft warning, the subcontract header includes the single project limit remaining, as well as the aggregate project limit remaining.

Can the system be used to send addendums as a follow up to bidding?

Yes. Addendums can be sent out electronically as a follow up to bidding.

Workflow could also be configured to accomplish this.

How is project specific qualifications handled. Some of our projects require specific qualifications unique to that project. For example, qualifications for gaming control board/licensing that may be needed for work on a casino project may not be qualification criteria for other jobs.

This configuration would be addressed during the implementation of Subcontractor Prequalification.

What is the CMiC inter-dependency of the Subcontractor Prequalification module on other CMiC modules like Bid Management and Procurement? If the Bid Management module functions are not used, is the performance of the Subcontractor Prequalification module affected. If so, please identify.

Numerous areas are connected to the Subcontractor Prequalification module such as Business Partner Maintenance, Bid Management when searching for and assigning bidders, as well as Subcontract Management and CMiC Workflow.

Is the collaboration functionality required to use this module? If so, please identify the dependencies and costs associated.

Subcontractor Prequalification requires a Self-Service license for subcontractor privileges when applying or maintaining their profile online. Please contact Michael Somer at CMiC for more details (416-736-0123 x266 or michael.somer@cmic.ca).

Does this module support/offer I/O?

CMiC I/O, like with workflow, would have to be configured for use with Subcontractor Prequalification as per your requirements.

Will the form letter functionality be compatible with this new module?

Yes. CMiC's Microsoft Integration Pack (MIP) is available for use with this module in producing output via Word and Excel. Dashboards, queries, and reports are also great options. This configuration would be addressed during the implementation of Subcontractor Prequalification.

Please identify what standard reports or output is provided with this module.

Reports, queries, dashboard objects, and workflow correspondence can be developed as per your unique requirements. This configuration would be addressed during the implementation of Subcontractor Prequalification.

Does this module support user extensions and user-defined fields?

This configuration would be addressed during the implementation of Subcontractor Prequalification.

Can you send sample reports in PDF format for us to review?

Reports, queries, dashboard objects, and workflow correspondence can be developed as per your unique requirements. This configuration would be addressed during the implementation of Subcontractor Prequalification.

How long will it normally take from time of install to realistically go live?

The length of time between install and go live would depend on configuration, reporting, and the number of users to be trained.

How much training do we need to budget for and would it be onsite?

General configuration and training should take between 5 and 10 days.

Does UDQ play a part in the surveys or is that part of the module?

The questionnaire that was shown to calculate the subcontractor rating is a user-defined function within the Subcontractor Prequalification module.

We use a custom numbering scheme for business partners so we can take advantage of the quick find feature in lookups. How will that work with this module? Do we have control over the business partner coding scheme?

Business partner autonumbering is supported by Subcontractor Prequalification.

Does the system allow for us to send out an email auto response once the prospective subcontractor completes the prequalification form? If so, who will the email responses be returned to and do we control the message being sent?

Workflow can be configured to manage all correspondence with respect to prequalification. You have full control over all the contacts involved during the workflow process. There is an Approvals tab in the Subcontractor Prequalification screen that provides from end control to the workflows.

Does the Federal Tax ID field work for Canadian customers?

Yes. The prompt upon logging in can be adjusted and linked to the registration code on the business partner for validation.

The Subcontractor Prequalification module was presented in detail, but the Bid Management module, which works hand in hand with the prequalification process, was not shown. Is this included with the Subcontractor Prequalification module? If not, is this an extra module and how is it licensed? (By Bid Management, we are referring to bid notices, downloading of bid documents by bidders, tracking of bidders.)

The Subcontractor Prequalification module is tied into the bid management process when searching for and assigning bidders to the invitation to bid and bid packages. Bid management is licensed through CMiC Project Management. Bidders logging into the system to download bid documents is

licensed through CMiC Collaboration. Please contact Michael Somer at CMiC for more details on Subcontractor Prequalification and Self-Service licensing (416-736-0123 x266 or michael.somer@cmic.ca).

How much information from the Subcontractor Prequalification module gets transferred into the business partner record once the applicant is approved? If it is not transferred, is it viewable from the business partner record?

Some of the items shared include work territories, address codes, market sectors, MBE designations, and attachments. Shared items can be accessed and updated via the Business Partner Maintenance screen or the Subcontractor Prequalification module. Items not shared can still be configured to view from the Business Partner screen via one of many reporting options.

How much access do subcontractors have to update their own profile in the system? Can they log in to update their address, etc?

Subcontractors and applicants can be provided access to the Subcontractor Prequalification Self-Service screen in order to create or update their profile. Please contact Michael Somer at CMiC for more details on Subcontractor Prequalification and Self-Service licensing (416-736-0123 x266 or michael.somer@cmic.ca).

What reports are included with the Subcontractor Prequalification module? One report we would like to see is a subcontractor rating report – a list of all subcontractors that can be filtered by rating.

Reports, queries, dashboard objects, and workflow correspondence can be developed as per your unique requirements.

Can you track 1st, 2nd, and 3rd tier subcontractors?

Subcontractors are currently all tracked at the same level, but could be configured during an implementation.

Index

A

С

Call Log - Tab	16, 29
CMiC Field - JSP	
Common Questions about Subcontract Prequalification	55
Company Name and Locations	34
Contacts - Tab	31
Control Flag to Make References Mandatory in Self Service	43

F

Financial - Tab	
Financial Contacts, Litigation Information, and References	
Frequently Asked Questions	55

G

Ι

Insurance - Tab	12, 24
Insurance and Safety Information	
Introduction	

K

⁷ Integration Points

L

License, Trade, and Business Status.	
Litigation - Tab	
Locations - Tab	

0

Overview - Prequalification Self Service	33
Overview - Setup & Administration	45
Overview - Subcontractor Relationship Management	1

P

Prequalification Control	42
Prequalification Control & Maintenance Options	41
Prequalification Limits at Controlling BP Level	53
Prequalification Required Indicator	53
Prequalification Setup	41
Project History - Tab	

R

References - Tab	30
Review Moderation - Screen	.51

S

Safety - Tab	
Self Service	
Subcontractor Log	
Subcontractor Prequalification	
Subcontractor Prequalification - JSP	
Subcontractor Prequalification - Screen	
Subcontractor Prequalification Applicants	
Subcontractor Prequalification Questionnaire	
Subcontractor Rating Setup	
Subcontractor Ratings - Mobile Integration	45
Subcontractor Relationship Management	
Subcontractors - Screen	
Submission Log - Tab	
Submissions Log - Tab	
Surety - Tab	
Surety and Financial Information	

U

User Defined Fields -	Tab	.11,	24