Quick Reference Guide -- Subcontracts

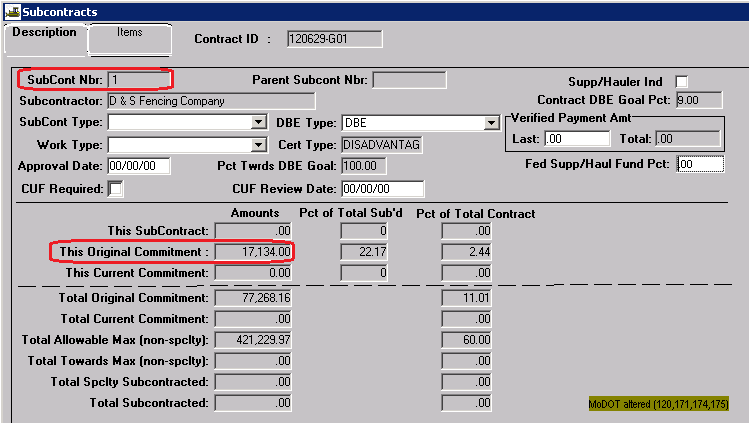
This article is intended to guide the user in the creation of a subcontract in SM.

Log on to the system and navigate to Contract Administration – Contractor Management – Subcontracts.  

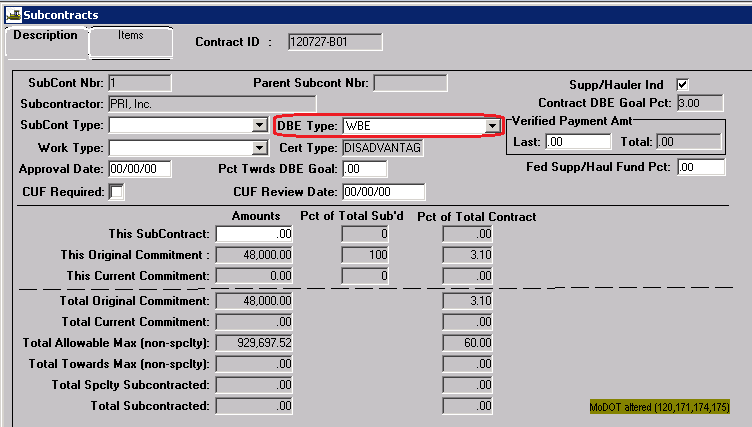





# Important Information Regarding Subcontract Process

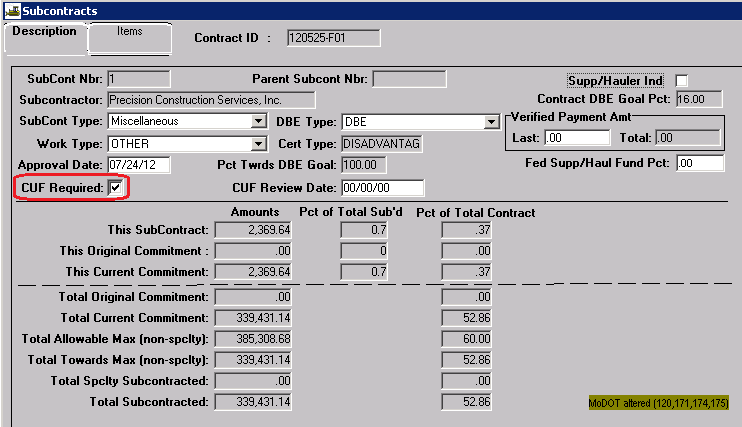
The contractor will submit **DBE commitments** at the time of bidding. These commitments can be for DBE suppliers and/or haulers as well as DBE subcontractors, and may be passed into the system as numbered **DBE subcontracts** (see below). Do NOT delete these subcontracts; they are to be left in the system.  


DBE subcontracts for suppliers/haulers that are passed into SM will be left as is, except when the DBE Type field contains something other than “DBE” (*e.g.*, MBE, WBE, MWBE, or OTH). In this case, select “DBE” from the drop down list.



# CUF Required

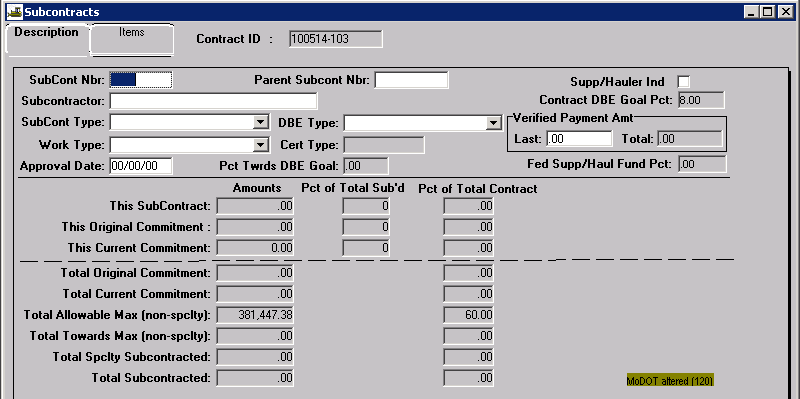
To determine if DBE subcontractors and supplier/haulers are performing a Commercially Useful Function (CUF), the project office must conduct CUF interviews as outlined in [EPG Category 146.3](http://epg.modot.org/index.php?title=Category:146_Disadvantaged_Business_Enterprise_%28DBE%29). When the Save icon is selected on the Description tab, “MBE”/”WBE” will change to “DBE” and the CUF Required check box will automatically select. Once the CUF interview is performed, the “CUF Review Date” should be entered.



When a Request to Subcontract (Form C-220) is received from the prime for a DBE subcontractor whose information has been passed into the system, verify the DBE Type. If it is something other than “DBE” (as noted above), change it to DBE. Select “SubCont Type” and “Work Type,” then click the Items tab and add the contract items as described under the “Items Tab” heading of this article.

When a Request to Subcontract (Form C-220) is received from the prime for a non-DBE subcontractor or for a DBE subcontractor whose information was not passed into SM, proceed as directed below.

# Description Tab



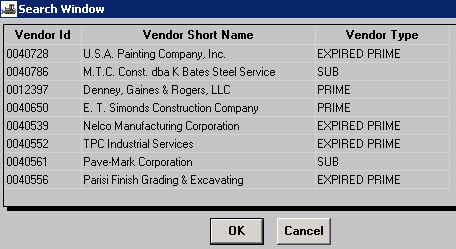
**Contract ID:** Select Services – Choose Keys to select contract.

**SubCont Nbr:** If DBE commitments have been passed into SiteManager, number the contract using the next available number. Otherwise, begin numbering with “1” -- do **NOT** enter contract numbers with a leading zero.

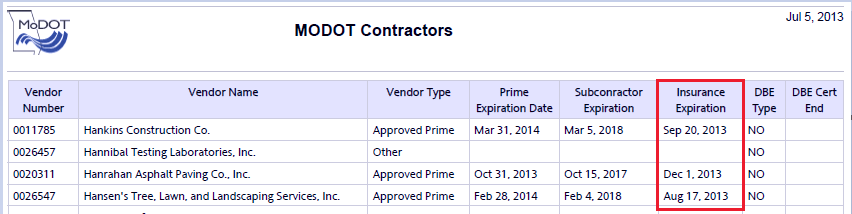
**Parent SubCont Nbr:** If this is a second tier subcontract, *i.e.*, a subcontractor hired by a previously approved subcontractor, perform a search and select the first tier subcontractor.

**Supp/Hauler Ind:**  Do not check this box. MoDOT does not subcontract with suppliers or haulers. (This box may be automatically checked as a result of a DBE commitment. If so, leave it checked.)

**Subcontractor:** Perform a search and select the appropriate subcontractor (vendor) from the list. Verify the subcontractor’s Vendor Id on the Request to Subcontract Work (Form C-220) with the Search Window if the subcontractor’s name does not appear exactly as it does on the Form C-220. Any vendor listed as “Subcontractor,” “Prime,” or “Expired Prime” may be selected.



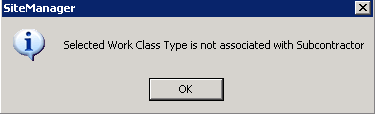
**Remarks Bubble :** Verify the contractor/subcontractor’s insurance by running the MoDOT Contractors report in Cognos. The report is located in the Headquarters > Contract Administration folder and is searchable.



**Note**: Contact the [Construction Contract Administrator](mailto:Christina.Teter@modot.mo.gov?subject=Need%20Subcontractor%20Added) at the Division Construction & Materials office if the subcontractor’s name is not available to be selected or if the insurance has expired.

**SubCont Type:** Select the type that most closely fits.

**DBE Type:** Select either “DBE” or “NO” from the drop down.

**Work Type:** Select a work type from the drop down that most closely matches the work the subcontractor will be doing. Because the work types are not associated with each contractor, SiteManager will produce the following message:   
  
  
  
Select OK.

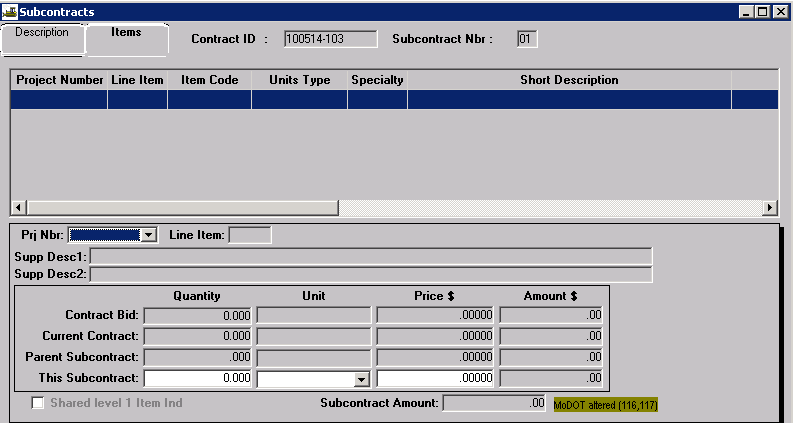
**Verified Payment Amt:**  MoDOT does not use these fields.

**Approval Date:** Do not enter anything in this field. An approval date will be entered when the subcontract is approved at the District level.

**Note:** It is possible to receive a subcontract for a non-DBE subcontractor before a DBE contract passed into the system. It is permissible to approve these subcontracts out of order.

# Items Tab

Click the New icon to open the Items detail at the bottom of the window.

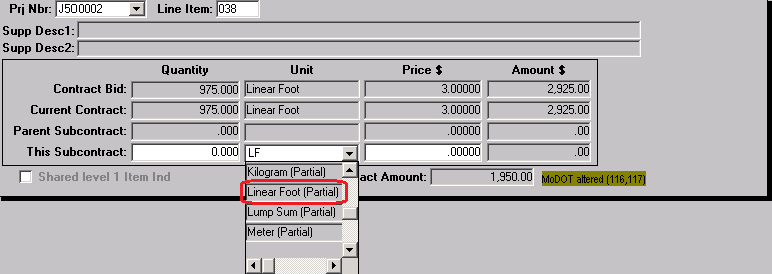


**Prj Nbr**: Select the appropriate project number from the drop down.

**Line Item**: Perform a search and select the appropriate line item.

**Note**: The tab order for this window has been changed. Tabbing will take the user from “Line Item” to “This Subcontract, Unit.” This is necessary so the system will not zero “This Subcontract, Quantity” when the unit is changed to “partial.”

**This Subcontract, Unit**: The contract unit will be displayed for the line item. Always select the corresponding **Partial** unit. For example, if the contract item unit is Linear Foot, the user should select Linear Foot (Partial) from the drop down.

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**This Subcontract, Quantity**: Enter the quantity of the subcontracted item.

**This Subcontract, Price**: Enter the amount shown on the Request to Subcontract Work (Form C-220) for the subcontract.

**This Subcontract, Amount**: This field is automatically calculated by the system.

Save the information. Select the New icon and repeat the above steps to add additional items to the subcontract.

Return to the Description tab and select the New icon to enter additional subcontracts.

# Modifying Existing Subcontracts

Certain situations will require modification of approved subcontracts.

Additional Contract or Contingent Item Work Added to an Approved Subcontract  
Revise the previously approved subcontract in SM for the additional items of work. This will allow the inspector to select the subcontractor as doing the additional work on the DWR Work Items tab. The user shall place a Remark indicating the date of the revision and why the subcontract was revised. No revision of the hardcopy is required.

Routine Increase of Contract Quantity on Subcontracted Items  
No modification of the subcontract is required.

Change of Subcontractors for Previously Approved Subcontracted Work Items  
In this situation, the user shall modify the existing subcontract removing the item(s) of work not being performed. The user shall add a remark indicating the reason for the revision. No revision of the hardcopy is required. A subcontract shall be added with the items of work to be performed by the new subcontractor. Hardcopies of the new subcontract shall be submitted.