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| Processing ***On-Call/MOU*** Consultant Contracts Checklist *(see EPG 134)* | |
| **1: PE Funding (EPG 134.2.2.1)** | |
| PE funds must be identified in the STIP in order to utilize the DBC Budget, otherwise the District/Division must use their own budget to cover the cost of the consultant contract. | |
| **2. Design Liaison Engineer Review and Approval of MOU (EPG 134.2.4)** | |
| All District MOU’s must be reviewed and approved by the assigned Design Liaison Engineer prior to selection of an on-call consultant to ensure all other resources have been considered. | |
| **3: MOU Contract in** [**eAgreements SharePoint Site**](http://sp/sites/eagreements/SitePages/Home.aspx) **(EPG 134.2.4)** | |
| PM/CA must choose the MOU contract from the eAgreements SharePoint site. The federal MOU contract must be used for all MOU’s unless approved by the PSC to use a state funded MOU contract (state funded MOU contracts may be used if the funding source is coming from a District/Division budget). | □ |
| **4: Develop Scope of Services and Establish DBE Goal for the Consultant Contract (EPG 134.2.4)** | |
| PM/CA must develop a scope of services to be provided for the project. Once the scope of work is defined, the MoDOT PM/CA must obtain a DBE Goal by sending the appropriate project information (including scope, county, estimated construction cost, potential subcontracting opportunities) to MoDOT External Civil Rights (ECR) for review at [DBEConsultGoal@modot.mo.gov](mailto:DBEConsultGoal@modot.mo.gov). Once the DBE goal has been established by ECR, it shall be included in the MOU. All consultant contracts that utilize federal funds must be reviewed by ECR, regardless of the dollar amount of the contract. If the prime consultant or any sub-consultants are DBE firms, the DBE section must be filled out. If the prime or subs are not DBE firms, the DBE section can be left blank. | □ |
| **5: Review the On-Call Consultant List and Choose a Consultant (EPG 134.2.4)** | |
| PM/CA will review the on-call consultant list and choose a consultant based on the scope of services that has been developed and DBE goal established. The on-call consultant list is found on the [MoDOT Website – Consultant Services – Consultant Prequalification Requirements](http://www.modot.org/business/consultant_resources/consultant_prequalification_requirements.htm). ***\*\*Note: Only firms that are prequalified with MoDOT financially can be chosen from the on-call consultant list. Firms must update their information yearly in order to stay current on their prequalification***. [MoDOT’s Prequalification List](http://www.modot.org/business/lpa/documents/ConsultantPreQualList.pdf). | □ |
| **6: Consultant executes contract (EPG 134.2.4) – Electronic or Wet Signatures** | |
| * When using electronic signatures, the PM/CA drafts contract in eAgreements and distributes for electronic execution through DocuSign. Reference [DocuSign instructions](http://sp/sites/eagreements/TrainingDocuments/Forms/AllItems.aspx) in eAgreements or [DocuSign workflow instructions](http://epg.modot.org/files/8/81/134_Docusign.pdf) in the EPG.   or   * When using wet signatures, the PM/CA sends contract to consultant for execution on their behalf. | □ |
| **7: MoDOT executes contract (EPG 134.2.4)** | |
| * District/Division must have the District Engineer or Division Engineer execute the contract on MoDOT’s behalf, per the [MHTC Policy “Delegation of Authority for Approval and Execution of Documents](http://modot.org/about/documents/008-01-01-EXECUTIONOFDOCUMENTS.pdf)”. | □ |
| **8: Contract Distribution (EPG 134.2.4)** | |
| * If using electronic signatures, copies of the fully executed agreement will be distributed electronically to the recipients entered into DocuSign. In DocuSign, the PM/CA must cc:/ Central Office FS (***Obligate***), DE (***CODEPSCReview***), and ECR (***DBEConcurrence***) so they receive a copy of fully executed agreement. * If using wet signatures, the PM/CA is responsible for uploading a copy of the fully executed MOU in eAgreements, sending the consultant a copy of the fully executed agreement, and sending a link to the fully executed agreement to Central Office FS (***Obligate***), DE (***CODEPSCReview***), and ECR (***DBEConcurrence***). | □ |
| **9: Notice to Proceed (EPG 134.2.4)** | |
| PM/CA sends NTP to consultant only after the contract is executed, federal funds have been obligated, and DBE concurrence is received. | □ |
| **10: Paying Invoices (EPG 134.5.1)** | |
| PM/CA receives invoices (Fig. 134.5.1.3) from the consultant and must review them for accuracy. | □ |
| PM/CA submits invoice to email group ***ContractualPayments*** so the invoice will be paid. The email or cover letter must state:   * Project #, * Amount to be paid * Entity/Vendor that is being paid * Activity Code | □ |
| **11: Contract Close-Out/Final Invoice (EPG 134.5.3)** | |
| * When submitting the FINAL invoice to Central Office - FS, the District/Division must mark the invoice final and tell Central Office - FS in the cover letter to CLOSE OUT the project and no further payments will be processed. * PM/CA must change the Agreement Status to “Completed” in [eAgreements](http://sp/sites/eagreements/SitePages/Home.aspx) to initiate the retention schedule of the document and to accurately track open/closed contracts. | □ |
| **12: Consultant Evaluation (EPG 134.5.4)** | |
| District/Division must perform an evaluation (through the [Design Consultant Evaluation Database](http://netprod3/DesignConsultant/Questionnaire)) of the consultant’s performance for engineering services contract with MoDOT at each project milestone and at a minimum, on an annual basis during the term of the contract. | □ |