

Process for Construction Project Consultant Services – Solicitation

Project Selection

- **Solicitation is needed if Consultant Fees are greater than \$200,000**
- Determine what type of inspection will be needed.
 - Roadway Inspection
 - Roadway and Asphalt Plant Inspection
 - RE oversight with Roadway Inspection, possibly Asphalt Plant Inspection

Step 1: DBE Goal Requirements *(1 to 3 weeks to receive answer)*

This process may take a week to obtain a DBE Goal percent, **request as early as possible.**

- The Consultant contract will require a DBE goal.
 - Items needed to get a DBE goal from ECR.
 - Project STIP Estimate – found in eProject folder for project or ask District Planning Manager.
 - Estimated Breakdown of Work on Engineering Consultant Contracts form
 - [Estimated Breakdown of Work Spreadsheet](#)
 - Enter the percent breakdown for the work the Consultant will perform totaling 100 percent for once completed.
 - Send request to DBEConsulGoal@modot.mo.gov
 - Items needed in request email
 - Request the DBE goal for construction inspection services.
 - Include – County, Route, Project Number, and Contract ID
 - Attached the STIP and Estimated Breakdown files to email.

Step 2: Solicitation and Request Letter (PSC Request) *(1 to 2 weeks for drafting/review/signatures)*

The Solicitation and Request Letter will begin the process of getting your request for Consultant Services added to the MoDOT Solicitation site.

- Solicitation and Request Letter (figure 134.2.2.2, EPG 134 Engineering Professional Services)
 - https://epg.modot.org/forms/general_files/DE/134.2.2.2.docx
- Items needed to fill out Solicitation and Request Letter
 - Estimated construction cost from STIP
 - PE and CE cost from STIP
 - DBE Goal from DEBConsulGoal group (ECR)
 - Scope of Service days (estimated calendar days for project)
 - Total cost of Consultant Service (estimated cost)
 - Go to “MoDOT Solicitations (FRG)” page to see posting calendar (MoDOT RFQ Posting Calendar).
 - <https://www.modot.org/modot-solicitations-rfq>
 - Look at “Posted to Website” date to determine when you want your letter posted to website.
 - Once the posted date has been determined for the PSC Request, allow at least two weeks prior to solicitation for review by the Construction and Design Liaisons.

- **Solicitation Response Date** - 2 to 3 weeks after the “Posted to Website” date to allow time for the Consultant to submit a “Letter of Interest”.
 - **Date of Selection** - Give two weeks after the “Solicitation Response Date”.
 - **Execution of Contract by date** - Give about two months after “Date of Selection” to complete all needed documents.
- District Liaisons will need to review Solicitation and Request Letter
 - Design Liaison Engineer
 - Construction Liaison Engineer
 - Bridge Liaison Engineer
- Fill out Consultant letter in the red highlighted areas.
- Fill out District contact information.
 - District Engineer for DE info
 - RE or ARE over the project info
- Fill out Consultant Service request.
 - Job Number, Location, Proposed Improvements, Length, Estimated Cost, DBE goal from ECR, and description of services required.
 - Rating Criteria w/ Weighted Values
 - Determine how you want the 6 categories weighted for your project needs. These values will also need to match the rating sheet.
- Once the Solicitation and Request Letter (PSC) is completed, it will need to be sent off to the Liaisons for review.
 - Attached PSC letter along with STIP, TIP, and/or SIMS project summary in an email and send to:
 - Design Liaison Engineer – **Person assigned to District.**
 - Construction Liaison Engineer – **Person assigned to District.**
 - Bridge Liaison Engineer – **Person assigned to District.**
- After all correction has been completed from the review. The Solicitation and Request Letter (PSC) is ready for docusign.
- An email will need to be sent to CODEPSCreview at codepscreview@modot.mo.gov for docusign
 - Items needed in the email.
 - PDF Version of the Solicitation and Request Letter (PSC)
 - List all individuals that will need to sign the Letter.
 - Design Liaison Engineer – **Person assigned to District**
 - Construction Liaison Engineer – **Person assigned to District**
 - Bridge Liaison Engineer – **Person assigned to District**
 - Transportation Planning Director – **Individual in this position.**
 - State Construction and Materials Engineer – **Individual in this position.**
 - State Bridge Engineer – **Individual in this position.**
 - PSC Chair approval – **State Design Engineer**
- Once all signatures have been completed, the Solicitation and Request Letter will be posted online at <https://www.modot.org/modot-solicitations-rfq>

Step 3: Consultant Selection and Ratings *(Allow up to 2 weeks – 1 week for committee to review letters before scoring meeting)*

Consultants will submit “Letters of Interest” for the RE or ARE by the date listed in the PSC Letter. A minimum of three Consultant “Letters of Interest” are required per PSC Request. If less than three are submitted, a discussion will need to take place with the Construction and Design Liaisons to extend the listing for an additional week to allow a Consultant to submit a letter. After the additional week, all letters submitted will be reviewed for the PSC

Request. During the discussion with Construction and Design Liaisons, it may be determined the additional week can be waived based on inspection needs.

- Review of “Letters of Interest” (LOI)
 - A selection committee needs to be formed to review and rate the Consultants’ letters.
 - Construction & Materials Engineer, RE and/or ARE, Project Manager, Construction Liaison, and any individual you feel can fairly rate the Consultants
 - A “Consultant Rating Form” will need to be created with all the Consultants that submitted a LOI.
 - Consultant Rating Form (Fig. 134.2.2.5.1, EPG section 134 Engineering Professional Services)
 - [Consultant Rating Form](#)
 - This rating form will need to match the values assigned in the PSC letter.
 - The submitted LOI’s and Rating Form will need to be emailed to the Selection Committee for review.
 - Allow at least one week for the Selection Committee to review, note comments, and determine the ratings per Consultant based on the review criteria before the selection meeting.
 - At the selection meeting, each member will provide their notes and discuss how they arrived at their rating score.
 - The selection committee will need to agree on which Consultant was selected.
 - Meeting notes will need to be saved along with all LOI’s submitted. Note what the Consultant did well and what improvements can be made to their letter if they ask after selection has been posted.
 - **All LOI’s, ratings, and notes need to be stored in eProjects or One Drive**

Step 4: Consultant Selection Approval Letter (*Less than 1 week after scoring completed – Letter can be drafted with Consultant name left blank prior to selection and rating*)

This letter is sent to the District Engineer for signature once the Consultant has been selected from the committee.

- Consultant Selection Approval Letter (Fig. 134.2.2.5.3, EPG section 134 Engineering Professional Services)
 - https://epg.modot.org/files/6/61/134.2.2.5.3_Oct_2021.docx
- Fill out the project description, short scope of work, which Consultant was selected, and PE/CE cost from STIP.
- Email the Consultant Selection Approval Letter with rating sheets attached in PDF to the District Engineer for signature.
- Email Signed selection letter to CODEPSCReview@modot.mo.gov and carbon copy assigned Liaisons.
 - CODEPSCReview will post selected Consultant to MoDOT Solicitation website.
- Once posted on website, the Consultants not selected may reach out for an explanation on why they were not selected.
- Once the District Engineer has signed, you can notify selected Consultant and begin the discussion of Scope of Work and Fee Estimate.

Step 5: Scope of Service Letter (Up to 1 week to allow Consultant to review and ask questions – **can be drafted prior to selection and rating**)

- Scope of Services
 - Let’s the Consultant know what work they will be required to perform and what expectations MoDOT requires. This is a detailed list of items that will be attached to the contract.
 - **Exhibit I** – This will detail the items the Consultant will be responsible for.

- List what testing will be required, what expectations are needed, what their services need cover, etc.
- **Exhibit II** – This will detail the items the Commission will be responsible for.
 - Training needed for Consultant to perform the work, loose box samples and oil cans for asphalt work, etc.
- **Exhibit IV** – Schedule or period of service for Consultant Services
 - Plan enough time: (not limited to examples)
 - To cover assigned work for the contract
 - To complete final plans
 - To cover stormwater reviews and seed acceptance/growth through winter
 - Once the scope has been completed, it will need to be sent to the Consultant. This will allow them to begin the process of creating their ‘Fee Estimate’ for the work items laid out in the scope.
 - The write-up for the Scope of Services can start prior to the selection of the Consultant and be readily available after the Consultant is selected.

Step 6: Background Check and Access to MoDOT Systems *(This can be completed while waiting for fee estimate, this will be an ongoing process while the contract is completed)*

- The Consultant will need to complete a background check to allow them access to MoDOT’s server for AWP, Cognos, eProjects, Sharepoint, and Virtual Desktop.
- Background check will allow HR/IS to assign a MoDOT username and password. *(If Consultant individual is already on a MoDOT project or has an active MoDOT account in the past 3 months, no background check is needed).*
 - A Background Check form will need to be completed by any Consultant individual accessing MoDOT’s internal network.
 - [Consultant Contractor Background Check Form](#)
 - The filled-out Background Check form will need to be sent to:
 - District HR
 - Missouri Automated Criminal History System (MACHS) background check will also need to be completed
 - <https://www.machs.mo.gov/MACHSFP/home.html>
 - Once completed, it needs to be submitted to HR
 - Once background checks have been completed and approved. HR will issue a username and password to access AWP and Cognos. (This could take up to 2 to 3 weeks to be fully processed)
 - The district IS department will need to be contacted to have STARTS request completed for Cognos and Contractor Performance Rating access once username has been created.
 - The Consultant will need a Virtual Desktop Environment to access MoDOT’s server to input data.
 - Horizon Virtual Desktop - [Horizon Virtual Desktop Client](#)
 - This is the system the Consultant will need to download. In this document is the process of downloading the virtual desktop
 - If the Consultant has any issues accessing Horizon
 - VDI Helpdesk (753-751-1900)
 - An email will need to be sent to ReDev with Consultant inspector names and email address to get access to sharepoint and assigned contract access in AWP.

Step 7: Evaluation of “Fee Estimate” *(1 to 2 weeks depending on the scope of work to be completed by Consultant)*

- Once Consultant has submitted the fee estimate, this document will need to be reviewed to determine the hours for the work described in the “scope of work” is reasonable.

- The fee estimate will need to be detailed with a breakdown of hourly cost, OT cost, miles, etc.
- The Consultant “Overhead Rate” percentage and Facilities Capital Cost of Money Rate (FCCM) will need to be checked
 - [SharePoint - Audits & Investigations section](#)
 - Click on [ConsultantOverheadRateLookup](#) for percentage values. (Will need site access to open the excel sheet)
 - FCCM is applied to labor costs only before Overhead Rate is applied
 - FCCM should not be included in the Fixed Fee calculation
- During the review of the submitted fee estimate, the profit (**Fixed Fee**) will need to be compared to the “MoDOT Allowable Profit Curve” graph.
 - [MoDOT Allowable Profit Curve](#)
 - Standard solicitation contracts capped at 15 percent
 - MOU contracts capped at 12 percent
 - Max subconsultant capped at 12 percent
- If a subconsultant is used, their fee estimate will also need to be included
 - The subconsultant does not need to include their FCCM in with their overhead rate
 - Review of the Overhead rate and FCCM percentages submitted by the subconsultant
 - FCCM should not be included in the **Fixed Fee** calculation
- Federal Highway requires that MoDOT completes an independent fee estimate to compare to what the Consultant submits. This Fee estimate will need to be saved for documentation in case of a Federal Highway audit.
- The **Fixed Fee** is based off the total cost of the work performed. When reviewing the hours for cost, it is better to estimate on the lower end. Even if the work is completed for less than the original cost, the fixed fee is still paid based on the original agreed cost and not the lower cost of work performed. A Supplement Contract can be created later if the original cost is underestimated.
- Once the Fee Estimate has been reviewed at the District level, it will need to be sent to the District assigned Liaisons for final review.
- Once verified and approved, the fee estimate will be **Exhibit III** for the contract.

Step 8: PSC Approval to Execute Contract (1 to 2 weeks to get all signatures completed)- **(This document can be prepared after the Consultant has been picked and Fee Estimate is being reviewed)**

- Once fee estimate has been approved, a “PSC Approval to Execute Contract” will need to be completed.
 - PSC Approval to Execute Contract (figure 134.4.1, EPG 134 Engineering Professional Services)
 - https://epg.modot.org/files/8/86/134.4.1_2022.docx
 - Information from the “Selection Approval Letter” will be needed to fill out the project description, scope of service, and period of service.
 - Information from the “Fee Estimate” will be needed to fill out the cost, man-hours, percent profit, work cost, fixed fee cost, and total cost.
 - Send to District Liaisons for review and comments.
 - Once completed, the PSC Approval to Execute Contract will need to be sent for signatures.
 - Send to codepscreview@modot.mo.gov
 - Items needed in the email.
 - PDF version of the PSC Approval to Execute Contract
 - List all individuals that will need to sign.
 - Design Liaison Engineer – **Person assigned to District.**
 - Construction Liaison Engineer – **Person assigned to District.**
 - Transportation Planning Director – **Individual in this position.**
 - State Construction and Materials Engineer – **Individual in this position.**

- State Bridge Engineer – **Individual in this position.**
- PSC Chair approval – **State Design Engineer**

Step 9: Consultant Agreement (1 to 2 weeks for review) – (Can be work on at the same time as PSC Approval to Execute Contract)

- Access to eAgreements is required to begin the contract process.
- This is the agreement that will be signed by the Consultant and MoDOT to allocate funds.
 - [eAgreements](#)
 - eAgreements Manual for additional information for agreements and DocuSign
 - [eAgreement Manaul](#)
- On the main page for eAgreements, select **"New Agreement"**

 eAgreements Home **New Agreement** Request a Change ▼ Admin ▼ Help ▼

- The agreement form needed is - **CM43** – *Construction Consultant Agreement*
 - This is Step 1 of the agreement
 - Click next to move to Step 2

New Agreement

Step 1: Choose a Template

CM43 Construction Inspection Consultant Agreement

Filter by Division

Search by Template Name

start typing to filter the list below

Clear Filters

Next

Template List (Viewing 363 of 363 templates)	
☐	CM04 Contract Bond
☐	CM05 Materials Lease
☐	CM06 River Barge Agreement
☐	CM07 Materials Standardization Service Agreement
☐	CM08 Inspection Services Agreement
☐	CM10 Standard Research Agreement
☐	CM11 Inspection and Testing Agreement
☐	CM13 Extension of Standard Research Agreement
☐	CM14 Assignment Agreement with Bond
☒	CM43 Construction Inspection Consultant Agreement
☐	CM44 Construction Inspection Supplemental Agreement
☐	CM46 Consultant Services Memorandum of Understanding (Federal Assistance)
☐	CM47 Consultant Services Memorandum of Understanding Supplemental Agreement
☐	CMB1 Basic Agreement Form
☐	CMB2 Extension of Basic Agreement
☐	CMB3 Task Order Contract
☐	CMB4 Task Order Contract Supplemental - Additional Time Only
☐	CMB5 Task Order Contract Supplemental - Additional Services Only
☐	CMB6 Task Order Contract Supplemental - Additional Time and Services

○ Step 2 of the agreement

Step 2: Provide Required Information

Warning: Using your browser's back button on this page will cause you to lose any unsaved changes. You can navigate to the previous page without losing your progress by using the back button at the bottom of this page.

Agreement Details

Agreement Amount

\$

Fee Estimate

Agreement with Whom

Consultant (Full Name)

☐ Agreement Amount unknown

Select this option if the agreement amount is currently unknown. You will have the opportunity to update the agreement amount at a later step.

Commission Details

Was this approved by specific Commission action?

← **Will be No unless directed by Commission**

Select Applicable Commission Policy

Highways-Consultant Engineering-STIP Project-Negotiated Contract ← **Solicitations will be STIP Project-Negotiated Contract**

Additional Comments

If you can't find your applicable policy or you have additional information enter it in this field.

Signature Type

There are two types of execution: electronic signature and wet (handwritten) signature. Electronic signature is preferred for executing all agreements as it speeds up the process but wet signature (handwritten) is acceptable.

Signature Type

Electronic (DocuSign) ← **Select "Electronic" (DocuSign)**

Previous or Parent Agreement

Previous/Parent Agreement

start typing to search by agreement number **Leave blank**

If this agreement is a supplemental or revision to a previous agreement, you can link to that previous agreement using the search above. All supplemental agreements should be linked to the original or master agreement. Hourly rate agreements should be linked to the master or negotiated rate agreement that the hourly is based on.

A maximum of 50 results will be displayed at a time, if you do not see your agreement please narrow your search criteria

- Enter the approved Fee Estimate amount along with the full name of the Consultant Firm
- Select "No" for Commission approved (*Only select "Yes" if directed by Commission*)
- Applicable Commission Policy – *Highway-Consultant Engineering-STIP Project-Negotiated Contract*
- Digital signature required
- Click next to move to Step 3

-
- *Step 3 of the agreement*

Step 3: Provide Agreement Location Information

Warning: Using your browser's back button on this page will cause you to lose any unsaved changes. You can navigate to the previous page without losing your progress by using the back button at the bottom of this page.

Do you have a SIMS Job number?

☒ Yes ☐ No

Will be Yes if Project Number is known

Please select one or more SIMS job numbers using the search below. At least one number must be selected before continuing.

Search for SIMS Job Numbers

start typing to search **Project Number**

Selected SIMS Job Numbers

Job Number	District	County(s)	Route(s)	
SE0002	SE	ST. FRANCOIS	US 67 S	Remove

Pulls information from SIMS

If you have any job identifiers, counties, or routes in addition to the SIMS job information, please enter them below

Job Identifier

Enter the applicable job number, program number, project number, RFP, or LPA (e.g. TAP-9999(999)), etc. If there is not job number, please enter "NA". (128 character limit)

Division/District Responsible

District administering contract

Agreement County(s)

ST. FRANCOIS

[Click Here to Add/Remove County\(s\)](#)

Agreement Route(s)

US 67

[Click Here to Add/Remove Route\(s\)](#)

Pulls information from SIMS

Other Details

Location

Enter a more detailed location description (US 50 at Jefferson etc.) (256 character limit)

Bridge Number(s)

[Click Here to Add/Remove Bridge Numbers](#)

[Add a Future Bridge Number](#)

Enter if contract has bridges involved

Is this agreement with another state?

☐ Yes ☒ No

Usually marked No

Agreement Comments

Enter services completed by Consultant

Please enter comments regarding the Agreement review. If additional comments are necessary, please indicate the changes within the document. (256 character limit)

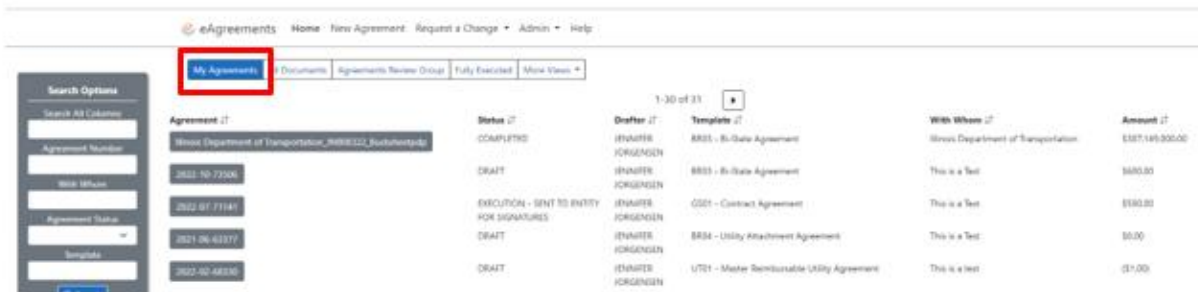
- Select Yes for SIMS Job Number
- Enter Job Number
- Division/District Responsibility – select District handling contract
- Job will populate in boxes from SIMS information
- Agreement Comments – Enter service completed by MOU
 - Examples (not limited to)
 - Resident Engineer and Roadway Inspection services
 - Roadway Inspection services
 - Asphalt Plant Inspection services
- Click next to generate contact
- Once all data has been entered and saved, the agreement will need to be downloaded for editing.

- An agreement number will be assigned once the agreement is created.
- Information will need to be entered into certain pages.
 - Page 1 – Enter information in the underlined sections
 - Contract Agreement number
 - Project Route
 - Project location with county
 - Project Number
 - Consultant Name (Full name listed in eAgreements)
 - Enter the contact executed date (date parent agreement was signed and
 - Type of work being performed (brief description)
 - Example
 - Roadway Inspection
 - Asphalt Plant Inspection
 - Route information, County(s), project limits (station or log mile), Project Number
 - Section (1) Definitions
 - Subsection (T) Services
 - Review Drafters Notes for Service.
 - Delete Drafters Notes after review
 - Section (2) Scope of Services
 - Subsection (A) – information to be entered.
 - Project Number
 - Route and County(s)
 - Project Office
 - Subsection (B) – Review Drafters Notes for Scope of Service requirement.
 - Delete Drafters Notes after review
 - Section (7) Disadvantage Business Enterprise (DBE) Requirements
 - Subsection (A) DBE Goal – Enter DBE goal from ECR
 - Subsection (8) DBE Participation Obtained by Consultant
 - Enter DBE goal from ECR
 - Fill out information for subconsultant or put N/A if none used
 - Section (8) Subconsultants – Subconsultant information with dollar amount (if applicable, N/A if none)
 - Section (10) Compensation – Review Drafters Notes for Compensation.
 - Delete Drafters Notes not required after review
 - Enter the required information for the Drafters notes that apply to the consultant contract
 - Actual Cost Plus Fixed Fee
 - (A) Enter Fixed Fee and Total Cost
 - (4.) A breakdown of the consultant Overhead on Salary Cost. This will need to be obtained through Audits and Investigation. They will be able to provide the breakdown
 - Section (23) Notice to the Parties – DE and Consultant information
 - Subsection (A) Notice to the Commission
 - Enter District Engineer information
 - Subsection (B) Notice to the Consultant
 - Enter Consultant information

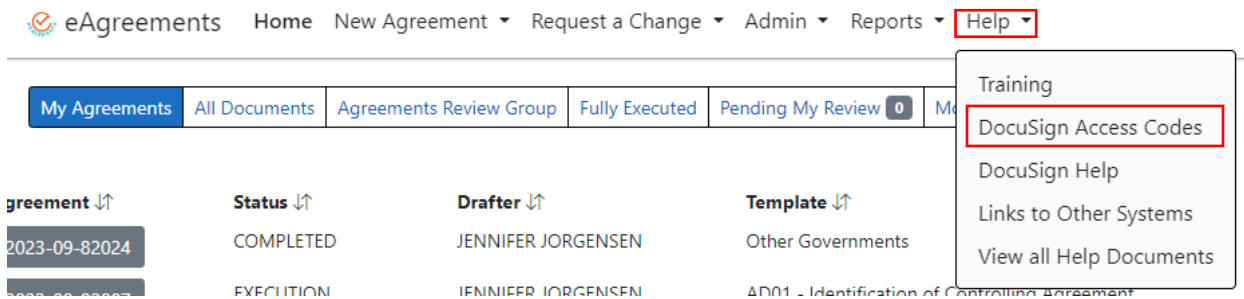
- Section (32) Attachments – Review Drafters Notes – keep what applies and delete the other two
 - Exhibit I - Scope of Service
 - Exhibit II - Services Provided by the Commission
 - Exhibit III - Estimate of Cost (Fee Estimate)
 - Exhibit IV - Schedule (Period of service)
 - Exhibit V, VI, etc for additional exhibits if applicable
- Page 33 – Update with Consultant name - **[Insert Consultant Name Here]**
 - Must match exactly what is in eAgreements
- Once eAgreement has been completed,
 - The edited version will need to be updated in eAgreements with your current changes.
 - This will need to be a **word document** for the Liaisons edit when reviewed.
 - Exhibit 1 and 2 (scope), Exhibit 3 (Fee estimate), and Exhibit 4 (period of service) will also need to be uploaded into eAgreements under the attachment tab. (**PDF format**)
- When all documents have been uploaded, it will need to be sent out for review.
 - Select the staff tab and enter the following individuals.
 - Construction Liaison – **Person assigned to District.**
 - Design Liaison – **Person assigned to District.**
 - Legal Counsel – **Designated Legal Counsel for Consultant Contract Review**
 - **(all contracts must be reviewed by Chief Counsels Office)**
 - After each individual/group has reviewed and corrections made from comments, the contract will need to be submitted to DBE Concurrence for review.
 - Select DBE tab and click submit.
 - Once the Liaisons and DBE have completed their review and all comments corrected, time for DocuSign.
- Download the edited word version of the agreement and create a PDF version of the contract including Exhibit 1, 2, 3, and 4.
 - This will need to be all in one file (**PDF**).
- Click on the tab **“Submit to DocuSign”** in eAgreements
 - A prompt will pop up, and you will need to upload the PDF file.
 - Next select the submit to DocuSign.
 - You will be prompted to click on move to DocuSign.
 - The DocuSign window will open to your agreement.

Step 10: Contract Agreement Execution *(Less than 1 week)*

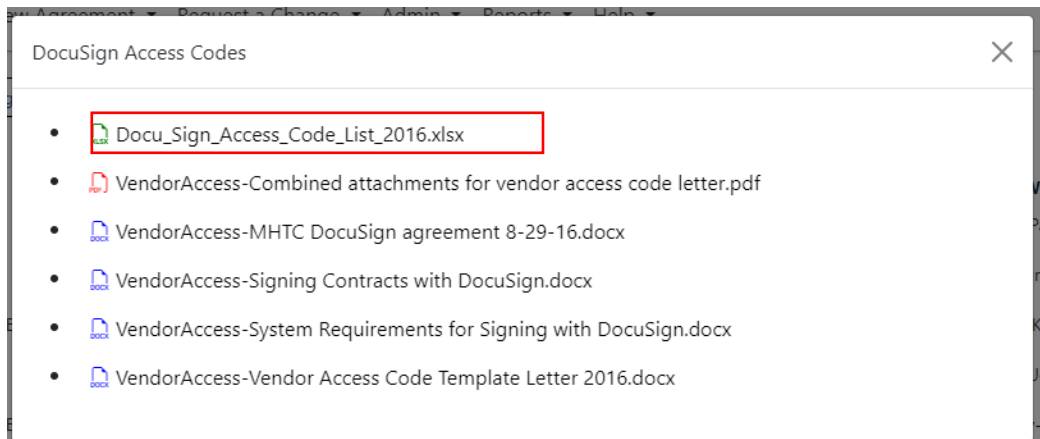
- In DocuSign, select the agreement and click the add signer button.
 - You will be prompted to begin filling out who will need to sign the agreement. Order of whose signing is below. Each signer will be assigned a color shade to the left of their name.
- For the Consultant to sign in DocuSign, an “Access Code” will need to be used. Follow this step below to determine Consultants “Access Code” or to get on authorized for the Consultant
 - **Navigate to the List of Access Codes (Steps 1-4)**
 1. In an internet browser (Edge [preferred], Google Chrome, etc.) navigate to the eAgreements II site
(<https://netprod3.dot.missouri/eAgreements/Search/QuickSearch>).
 2. By default, the drafter will land on the “My Agreements” view.



3. Click on the arrow next to the Help menu.



4. Select "DocuSign Access Codes".



o **Determine if the External Party has an Access Code (Steps 5-6)**

5. Can you find the external party on the list (look under the *Vendor Name* field)?

If **yes**, go to Step 6.

If **no**, go to Step 7.

6. Is there a date in the *Date Access Code Issued to Vendor* field?

If **yes**, a letter with the access code has already been sent to the external party. You may want to contact your external party to remind them they have already received their access code and will need it to execute the agreement. No other steps are necessary at this time.

If no, go to Step 7.

Date Access Code Issued to Vendor MM/DD/YY	DOCUSIGN PIN	REVENDOR NM	VENDOR NUMBER	VENDOR NAME
	107399		4315684870	Wayne Millington
	107400		4318999760	Wayne's Heating & Co



- **Request an Access Code, If Applicable (Step 7)**

7. Send an email to the CS email group (CS@modot.mo.gov) requesting a DocuSign access code. You will need to provide the following information, which the external party should be able to provide.

- ☐ SAMII Vendor Number, Missouri Buys Number, or Federal/Taxpayer Identification Number
- ☐ Name
- ☐ Address, City, State, and Zip Code
- ☐ Phone Number

A member of the CS email group will email you and let you know the list of access codes has been updated. When this has been completed, the DocuSign process can begin.

- **Begin the process of getting signer and CC boxes added**

- You will click “Add Recipient” to add boxes for signers and CC individuals
 - Update the signing/CC order on the left-hand side.
 - Executive Assistants will need to match the signing order number as the Commission signer

The screenshot displays the DocuSign interface for adding a recipient. The 'Name' field contains 'Consultant Signers Name' and the 'Email' field contains 'Consultant Signers email'. A dropdown menu is open next to the 'Needs to Sign' button, showing options: 'Select signature type', 'Add access code' (highlighted with a red box), 'Add identity verification', and 'Add private message'. Below the fields, the 'Access code' section has a text input field with a red arrow pointing to it and the text 'Enter 6 digit code'. A sidebar on the left shows a box with the number '1'.

- Consultant Agreement Signer (Name and email will need to be entered) **(Level 1)**
 - Select “Need to Sign” to right of name.
 - Click on Customize
 - Select “Add access code”
 - This code needs to be sent to the Consultant Signer

2

Name *

District Assigned Chief Counsel

Needs to Sign ▼

Customize ▼

Email *

District Assigned Chief Counsel email

DS Electronic

- **Commission Counsel Signer (Level 2)**
 - Chief Legal Counsel – **District Assigned Counsel from Chief Counsel Office**
 - Select “Need to Sign” to right of name.

3

Name *

MARK CROARKIN

Needs to Sign ▼

Customize ▼

Email *

MARK.CROARKIN@modot.mo.gov

DS Electronic

3

Name *

Tara Herx

cc Receives a Copy ▼

Customize ▼

Email *

tara.herx@modot.mo.gov

DS Electronic

3

Name *

Dana L. Kaiser

cc Receives a Copy ▼

Customize ▼

Email *

Dana.Kaiser@modot.mo.gov

DS Electronic

- **Missouri Highway and Transportation Commission Signer (Level 3)**
 - Executive Officer – Assistant Chief Engineer - **Mark Croarkin**
 - Select “Need to Sign” to right of name.
 - For level 3 these individuals will need to be CC

- Senior Executive Assistant - **Tara Herx**
 - Select “CC” to right of name.
- Senior Executive Assistant to Director - **Dana Kiser**
 - Select “CC” to right of name.

4

Name *

Jennifer Jorgensen

Needs to Sign ▾

Customize ▾

🗑️

Email *

jennifer.jorgensen@modot.mo.gov

DS Electronic

▾

4

Name *

Lisa Gerling

CC Receives a Copy ▾

Customize ▾

🗑️

Email *

lisa.gerling@modot.mo.gov

4

Name *

Betty Wood

CC Receives a Copy ▾

Customize ▾

🗑️

Email *

betty.wood@modot.mo.gov

- **Secretary to the Commission Signer (Level 4)**
 - Secretary to the Commission – **Jennifer Jorgenson**
 - Select “Need to Sign” to right of name.
 - For level 4 this individual will need to be CC
 - Senior Executive Assistant to Commission Secretary - **Lisa Gerling**
 - Select “CC” to right of name.
 - Senior Executive Assistant to Commission Secretary – **Betty Wood**
 - Select “CC” to right of name.
-

5

Name *

CODEPSCReview

CC Receives a Copy ▾

Customize ▾

Email *

codepscreview@modot.mo.gov

5

Name *

DBE Concurrence

CC Receives a Copy ▾

Customize ▾

Email *

DBEConcurrence@modot.mo.gov

5

Name *

Obligate

CC Receives a Copy ▾

Customize ▾

Email *

obligate@modot.mo.gov

- **Review Groups (Level 5)**

- These groups will all receive a “CC”
 - CODEPSCReview
 - Select “CC” to right of name.
 - DBE Concurrence
 - Select “CC” to right of name.
 - Obligate
 - Select “CC” to right of name.

-
- Click **Next** in the bottom right-hand corner to continue to place the signatures on the agreement.
 - You will assign the location for the signature for each individual listed above in the PDF document. You will be required to set up the signature blocks, date blocks, and title blocks per person.
 - On the left side of the screen is where the different blocks are located (The color of the signature block will match the color shade when setting up the individuals)
 - Consultant signature data
 - Click and drag the “Signature” block and drop it on the line under the consultant signer. Next click and drag the “Title” block and drop it on the line under the signer's block. Finally click and drag the “Date” block and drop it on the line for the “Executed by the Consultant on” section above the signer's area.
 - On the right-hand side there will be a drop-down menu with each individual's name that will be signing, title block and date are assigned to the Consultant, make sure this is selected for each item).

- Executive Officer signature data (MoDOT)
 - Click and drag the “Signature” block and drop it on the line above the **Commission Council**
 - On the right-hand side there will be a drop-down menu with each individual's name for signing, make sure **District Assigned Council** is selected.
 - Click and drag the “Signature” block and drop it on the line under the **Missouri Highways and Transportation Commission**. Next click and drag the “Title” block and drop it on the line under the signer's block.
 - On the right-hand side there will be a drop-down menu with each individual's name for signing and title, make sure **Mark Croarkin** is selected.
 - Click and drag the “Signature” block and drop it on the line above the **Secretary to the Commission**. Next click and drag the “date” block and drop it on the line “Executed by Commission on”.
 - On the right-hand side there will be a drop-down menu with each individual's name for signing and title, make sure **Jennifer Jorgensen** is selected.
- See below for layout.

The screenshot shows a legal agreement form with two main sections: "MISSOURI HIGHWAYS AND TRANSPORTATION COMMISSION" and "BACON FARMER WORKMAN ENGINEERING & TESTING, INC.". Each section has fields for "By:" (Signature), "Title:", "ATTEST: (Commission seal)", and "APPROVED AS TO FORM:". Red arrows point to specific fields: "Chief Engineer and Title" points to the "By:" field of the Missouri section; "Consultant Signer, Consultant Title, and date signed" points to the "By:" field of the Bacon Farmer section; "Commission Secretary and date signed" points to the "By:" field of the Missouri section; and "District Assigned Chief Counsel" points to the "By:" field of the Bacon Farmer section. On the right side, there is a "Signature" block with a dropdown menu for "Recipient" showing "Mark Workman" selected, and a "Send" button highlighted with a red box.

- Click on send once all boxes have been assigned and properly color coded to the correct individual.
- The agreement will be sent in order to each individual or group after signing has been completed. You will receive an email once each individual has signed the agreement.

Step 11: Consultant Agreement Completion

- You will receive an email from MoDOTSP stating the “agreement has been fully executed”.
- An Email from obligate@modot.mo.gov will be received roughly one to two weeks after the agreement has been fully executed.

- Financial Services will send an email with the SAM II code for the Financial Number. The email will be roughly two to three weeks after the agreement has been fully executed. (The Financial number will not be issued until Federal Highway completes their review of the contract)
- Once Funds are obligated, the Notice to Proceed can be issued
 - NPT letter will need to be sent to the Consultant
 - [NTP Letter](#)