

MoDOT Trns*port™ SiteManager™

Quick Reference Guide

Subcontracts

So, you want to create a Subcontract? Here's a quick reference on what steps to take.

Contract Administration.Contractor Management.Subcontracts

Description Tab

1. **SubCont Nbr:** Use a two digit subcontract number such as 01, 02,.. etc. this will put the subcontracts in logical order when looking at a list of the subcontracts because of the method SM uses to sort numeric values.
2. **Parent Subcont Nbr:** MoDot does not use parent subcontractors, do not put anything in this field.
3. **Supp/Hauler Ind:** MoDot does not write subcontracts for Supp/Hauler, so do not check this box.
4. **Subcontractor:** Subcontractor is picked from a list, the subs may be listed more than once. The subcontractor may not appear on the list exactly as it does on the paper copy of the subcontract from the prime. Choose the name that resembles the name the closest. Assume that a contractor listed as a prime is approved to be a subcontractor. If the subcontractor does not appear on the list, stop and contact the Construction Reports Processor in the Support Center in order to have the subcontractor added to the list.
5. **SubCont Type:** Pick the one that most closely fits. This is only a description field and does not affect how the subcontract is calculated. For now, if you have a DBE that is doing Speciality work choose DBE for the type.
6. **DBE Type:** Choose Spaces as the DBE type. This field affects the way the subcontract is calculated and for now, DBE's will not be tracked in SiteManager.
7. **Work Type:** Use what matches the subcontractor the closest. Sometimes work type for contractors is not populated with real "work types" that are associated with each contractor and this causes SiteManager to produce warning statements saying that the subcontractor is not associated with the specified work type. If you receive this warning, select OK. A subcontract can still be entered after these warnings are bypassed.
8. **Verified Payment Amt.:** At this time there is no need to put an entry in this field.
9. **Approval Date:** When catching up existing contracts, enter the District Approval Date. When entering subcontracts after July 1, 1999, leave this field blank at the Project Office level. This date will be entered when the subcontract is approved in the District.
10. **This Original Commitment:** Leave blank , this may be used later if we track DBE's within SM.
11. Save the information entered. If you receive the error "Subcontractor's uncompleted work amount exceeds the sum of work class qualification amount" appears, select OK.

Items Tab

Be sure to place the focus in the lower portion of the window.

1. **Prj Nbr:** Select the project that the item applies to from the drop down list.
2. **Line Item:** Search for the line item that applies. In the upper window check that any speciality items are designated with a Y in the speciality item. (Speciality items are designated in the Job Special Provisions). If any discrepancies are found, contact the Construction System Administrator immediately!
3. **This Subcontract, Quantity:** Enter the quantity of the item that is subcontracted **unless** an item is included on more than one subcontract. If it is, SiteManager requires you to calculate the quantity of the item based on the percentage of the unit price for which the subcontractor will be reimbursed. Only adjust the quantity of the item, leave the unit price the same as the original contract amount.

Example: The contract plan quantity is 4 Movable Barricades at unit price of \$500.00 each.

Subcontractor #1 is going to furnish and install the barricades. Subcontractor #2 is going to provide the daily maintenance of the barricades. The Prime contractor submits approval for the subcontracted line items for each subcontractor. The submittal for Subcontractor # 1 shows the quantity of 4 each at the unit price of \$225.00 and the submittal for Subcontractor #2 shows a quantity of 4 each at the unit price of \$275.00. To calculate the correct quantity take the unit price submitted by the subcontractor, divided by the original contract unit price, then multiply by the original plan quantity.

Subcontract #1 = $\$225.00/\$500 = 0.45 \times 4 = 1.8$

Enter 1.8 in the This Subcontract Quantity field and \$500.00 for the Unit Price for subcontract #1

4. **This Subcontract, Unit:** The correct unit should already be displayed for the line item. If not, select from the drop down list.
5. **This Subcontract, Price \$:** Enter the price per unit for the item. This may have to be adjusted from what it actually is if you encounter a situation as described in #3.
6. Save the information entered.
7. Repeat Steps 1 -6 of the Items Tab section for any additional items associated to this subcontract. Focus in the upper portion of the window and select the new icon. Remember to save each additional item.
8. If additional subcontracts are desired, return to the Description folder tab and select the new icon.