

# General Contracts Procedures – Project Managers

## Possible statuses that PMs will receive:

<i>Who sets it to this status?</i>	<i>Who receives this status?</i>	<i>Status</i>	<i>Description</i>
PM	PM	CM-PM REQUEST	CM or PM is requesting initial contract. If CM, the request needs to go to PM for approval.
PM	PM	PM APPROVE REQUEST	PM needs to approve the initial contract request by CM.
AC	PM	INCOMPLETE -AC TO PM	Accounting is missing information. PM should go to notes section to see what is needed and reply.
CN	PM	INCOMPLETE -CN TO PM	Contracts is missing information. PM should go to notes section to see what is needed and reply
BOB	PM	NEED PM APVL FOR DOJ	Bob Voica has approved contract for DOJ review and is sending it to the PM to review
BOB	PM	MGR APPROVED - TO PM	Bob Voica has approved contract and is sending it to the PM to review

## FIND A CONTRACT



- Go to Module/Contract Administration, then Contract Administration/Project Contract

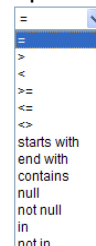


- Click on Search icon in toolbar  

- Scroll down to Project Manager and set it to your last name



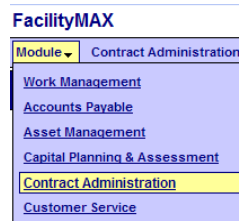
- Click  to execute search
- Use any other fields on this page to narrow your search including Status
- If you want to search on a Contractor Name, go to description. Use the drop down to select "contains", type the name
- If you are looking for a particular status, select that status
- Click  to execute search



# REQUEST A NEW CONTRACT

CM or PM wants to request an initial contract.

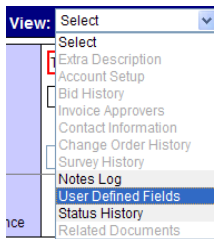
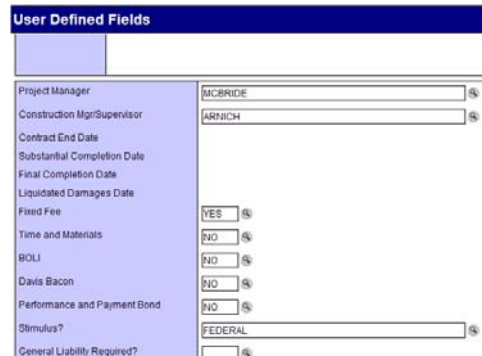
- Go to Module/Contract Administration
- Contract Administration/Project Contract



- Start new contract
- Leave **Contract Number** as assigned.
- Enter **Description**. Include Contractor name (if known), Building, Project Name, Work Request # (if known) and dollar amount of contract.
- Choose **Contractor**. When searching, make sure you're setting description to "contains" and enter name. If contractor has not been selected, use UNKNOWN.
- Enter today's date in **Request Date**
- Choose a contract type from **Type**

- Fill out User Defined Fields (UDF's) under View/Select/User Defined Fields

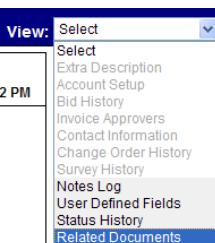
- o **Project Manager** (last name)
- o **Construction Manager** (last name)
- o **Contract End Date**
- o **Substantial Completion Date** (if needed)
- o **Final Completion Date** (if needed)
- o **Liquidated Damages?** (yes/no)
- o **Liquidated Damages Amount** (\$)
- o **Liquidated Damages Start Date** (if needed)
- o **Fixed Fee** (yes/no)
- o **Time and Materials** (yes/no)
- o **BOLI** (yes/no)
- o **Davis Bacon** (yes/no)
- o **Performance & Payment Bond** (yes/no)
- o **Stimulus** (Federal/State/None)
- o Click green flag



- You can Save at this point if you don't want to lose your work
- After saving, click on Edit

- Attach quote and estimate sheet (under View/Select/Related Documents)




- o Go to View/Select/Related Documents
- o Click on yellow post it note (not paper clip) to add a document
- o Click on icon next to Flag and select General
- o Click on Browse
- o Find your document and double click on it
- o Click on attach
- o Enter Title for document – something like Quote or Estimate Sheet
- o Click Save , green flag , green flag



- Change Status to PM APPROVE REQUEST if you are a CM
- Change Status to TO ACCOUNTING if you are a PM
- Save

## RESPOND TO PM APPROVE REQUEST STATUS






Construction Manager has requested a contract that needs PM approval before being sent to Accounting

- If the project is not in your Personal Query Count on your FacilityMax desktop, use the instructions to Find a Contract
- Click on Edit 
- Review **Description** – should include Contractor name (if known), Building, and Project Name
- Confirm **Contractor**
- Scroll down to see if there is anything entered under Line Items at the bottom
  - o If so, click on the link to the left and review **Work Order**, **Phase** and **Award** amount
  - o Click on green flag 
- Check that the following UDF's have been filled out (under View/Select/User Defined Fields)
  - o **Project Manager** (last name)
  - o **Construction Manager** (last name)
  - o **Contract End Date**
  - o **Substantial Completion Date** (if needed)
  - o **Final Completion Date** (if needed)
  - o **Liquidated Damages Date** (if needed)
  - o **Fixed Fee** (yes/no)
  - o **Time and Materials** (yes/no)
  - o **BOLI** (yes/no)
  - o **Davis Bacon** (yes/no)
  - o **Performance & Payment Bond** (yes/no)
  - o **Stimulus** (Federal/State/None)
- Confirm that a quote and estimate sheet have been attached (under View/Select/Related Documents)
- Review quote and estimate sheet for accuracy
- Change Status to TO ACCOUNTING
- Save 

User Defined Fields	
Project Manager	MACERIDE
Construction Mgr/Supervisor	ARNICH
Contract End Date	
Substantial Completion Date	
Final Completion Date	
Liquidated Damages Date	
Fixed Fee	YES
Time and Materials	NO
BOLI	NO
Davis Bacon	NO
Performance and Payment Bond	NO
Stimulus?	FEDERAL
General Liability Required?	

## RESPOND TO INCOMPLETE – AC TO PM STATUS






Accounting has changed the status to INCOMPLETE –AC TO PM and sent the contract back to you with a question.

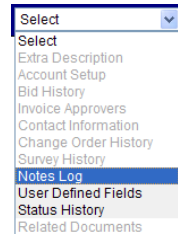
- If the project is not in your Personal Query Count on your FacilityMax desktop, use the instructions to Find a Contract
- Go to Notes Log (View/Select/Notes Log) to find out what information is still needed
- Review note with request from Accounting
- Reply to the note by adding a new note
  - o Click on green plus sign  to add a new note
  - o Type in red outlined notes field
  - o Click Save , green flag 
- Click on Edit 
- Change the status to PM RETURNING TO ACCT
- Save 

Select
Select
Extra Description
Account Setup
Bid History
Invoice Approvers
Contact Information
Change Order History
Survey History
Notes Log
User Defined Fields
Status History
Related Documents

## RESPOND TO INCOMPLETE – CN TO PM STATUS



Contracts has changed the status to INCOMPLETE –CN TO PM and sent the contract back to you with a question.

- If the project is not in your Personal Query Count on your FacilityMax desktop, use the instructions to Find a Contract
- Go to Notes Log (View/Select/Notes Log) to find out what information is still needed
- Review note with request from Contracts
- Reply to the note by adding a new note
  - o Click on green plus sign  to add a new note
  - o Type in red outlined notes field
  - o Click Save , green flag 
- Click on Edit 
- Change the status to PM RETURNING TO CNTR
- Save 





## RESPOND TO NEED PM APVL FOR DOJ STATUS

A contract has been written that will need to go to DOJ for approval but needs your approval first

- If the project is not in your Personal Query Count on your FacilityMax desktop, use the instructions to Find a Contract
- Review Contract under View/Select/Related Documents
- If there are questions or concerns, call the Contracts Officer directly to resolve
- Keep any notes in the Notes Log (View/Select/Notes Log)
- Once approved, click on Edit 
- Change the status to PM APPROVED FOR DOJ
- Save 

## RESPOND TO MGR APPROVED – TO PM STATUS

Contracts has written the requested contract, gotten internal approval and has attached it for your review

- If the project is not in your Personal Query Count on your FacilityMax desktop, use the instructions to Find a Contract
- Review Contract under View/Select/Related Documents
- If there are questions or concerns, call Contracts directly to resolve
- Keep any notes in the Notes Log (View/Select/Notes Log)
- Once approved, click on Edit 
- Change the status to PM APRVD –TO AST DIR
- Save 

## Contract Statuses in Facility Max

<b>Who sets it to this status?</b>	<b>Who receives this status?</b>	<b>Status</b>	<b>Description</b>
PM	PM	CM-PM REQUEST	CM or PM is requesting initial contract. If CM, the request needs to go to PM for approval.
PM	PM	PM APPROVE REQUEST	PM needs to approve the initial contract request by CM.
PM	AC	TO ACCOUNTING	PM has approved initial contract request entered by CM and is forwarding to Accounting
AC	PM	INCOMPLETE -AC TO PM	Accounting is missing information. PM should go to notes section to see what is needed and reply.
PM	AC	PM RETURNING TO ACCT	PM has entered notes providing the requested missing information and is returning the contract request to Accounting
AC	CN	TO CONTRACTS	Accounting is done with contract request and forwarding to Contracts
CN	CN	TO RFP/RFQ/ITB	Contract is out for proposal/quote/or bid
CN	CN	PREPARE CONTRACT	Contracts is preparing contract
CN	PM	INCOMPLETE -CN TO PM	Contracts is missing information. PM should go to notes section to see what is needed and reply
PM	CN	PM RETURNING TO CNTR	PM is providing the requested missing information and is returning the contract request to Contracts
CN	BOB	NEED MGR APPROVAL	Contract is written and awaiting approval from Bob Voica
BOB	PM	NEED PM APVL FOR DOJ	Bob Voica has approved contract for DOJ review and is sending it to the PM to review
PM	BOB	PM APPROVED FOR DOJ	PM has reviewed and approved contract for DOJ review and is sending it to Bob Voica to send to DOJ
BOB	BOB	TO DOJ	Contracts is sending the contract to DOJ for review
BOB	PM	MGR APPROVED - TO PM	Bob Voica has approved contract and is sending it to the PM to review
PM	DAVID	PM APRVD -TO AST DIR	PM has reviewed and approved contract and is sending it to David Hobbs
DAVID	CN	AST DIR APRVD -TO CN	David Hobbs has reviewed and approved contract and is sending it to the Contracts Dept to send out for Contractor signature
CN	CN	SENT TO CONTRACTOR	Contract has been sent to Contractor for signature
CN	CN	CONTRACTOR SIGNED	Received signed contract from Contractor
CN	AC	CONTRACT EXECUTED	Contract has been executed
AC	AC	ENCUMBERED	Accounting encumbered contract value
AC	AC	RETAINAGE RELEASED	Retainage released
		CLOSED	Contract closed
		HOLD	Hold
		ERROR	Error
		CANCEL	Contract canceled

## Change Order Statuses in Facility Max

Who sets it to this status?	Who receives this status?	Status	Description
PM	PM	CM-PM REQUEST	CM or PM is requesting a change order. If CM, the request needs to go to PM for approval.
PM	PM	PM APPROVE REQUEST	PM needs to approve the change order request by CM.
PM	CN	PM APRVD -TO CNTR	PM has approved the CO and is sending it to Contracts to write
CN	CN	PREPARE CHANGE ORDER	Contracts is preparing change order
CN	PM	INCOMPLETE -CN TO PM	Contracts is missing information. PM should go to notes section to see what is needed and reply
PM	CN	PM RETURNING TO CNTR	PM is providing the requested missing information and is returning the change order request to Contracts
CN	BOB	NEED MGR APPROVAL	Change order is written and awaiting approval from Bob Voica
BOB	AC	MGR APPROVED -TO ACTG	Bob Voica has approved change order and is sending it to Accounting for approval
AC	PM	INCOMPLETE -AC TO PM	Accounting is missing information. PM should go to notes section to see what is needed and reply.
PM	AC	PM RETURNING TO ACCT	PM has entered notes providing the requested missing information and is returning the contract request to Accounting
AC	PM	ACCT APRVD - TO PM	Accounting has allocated funds in Fmax for the Change Order and is forwarding the CO to PM for approval
PM	DAVID	PM APRVD -TO AST DIR	PM has reviewed and approved the change order and is sending it to David Hobbs
DAVID	CN	AST DIR APRVD -TO CN	David Hobbs has reviewed and approved change order and is sending it to Contracts to send out for Contractor signature
CN	CN	SENT TO CONTRACTOR	Change Order has been sent to Contractor for signature
CN	CN	CONTRACTOR SIGNED	Received signed change order from Contractor
CN	AC	CHANGE ORD EXECUTED	Change order has been executed
AC	AC	ENCUMBERED	Accounting encumbered change order value
		HOLD	Hold
		ERROR	Error
		CANCEL	Contract canceled