



Managing Subcontracts - Internal

CONSTOFF, BOOKPR

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Managing Subcontracts

Background

A subcontract is a contract between the prime contractor on an agency contract and a third party. The subcontract assigns part of the work in the original contract to the third party. Managing subcontracts includes both the Area office Bookkeeper and the District Construction office. The Area Office Bookkeeper will enter the subcontractor for the contract and the District Construction office will approve the association with the contract in the

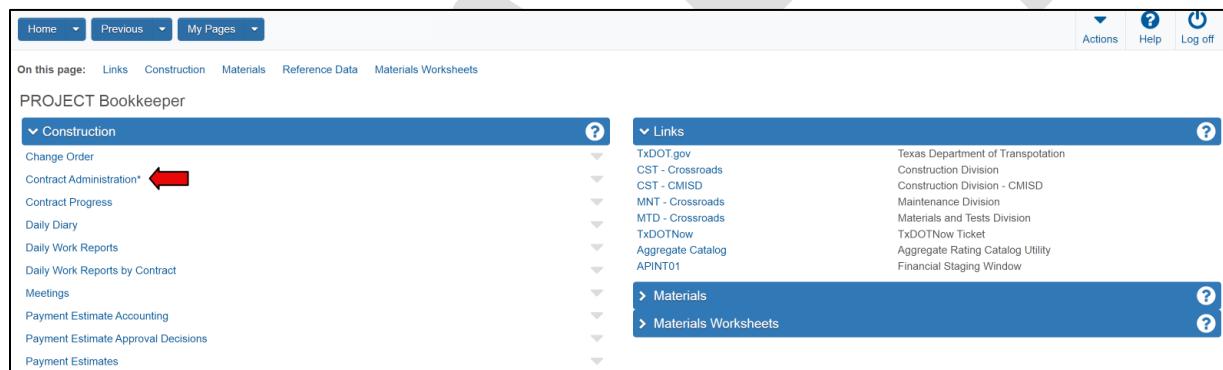
Key to Action Buttons

- Actions Global Actions menu (top of the screen)
- Component Actions menu (on headings)
- Row Actions menu (on rows)

Adding Subcontracts to a Contract - Bookkeeper

Navigation: Construction > Construction Administration

1. From the **Construction** component, select the **Contract Administration** link.



The screenshot shows the 'Construction' component's 'Contract Administration' link highlighted with a red arrow. The interface includes a 'Links' section with various TxDOT links like TxDOT.gov, Construction Division, and Maintenance Division.

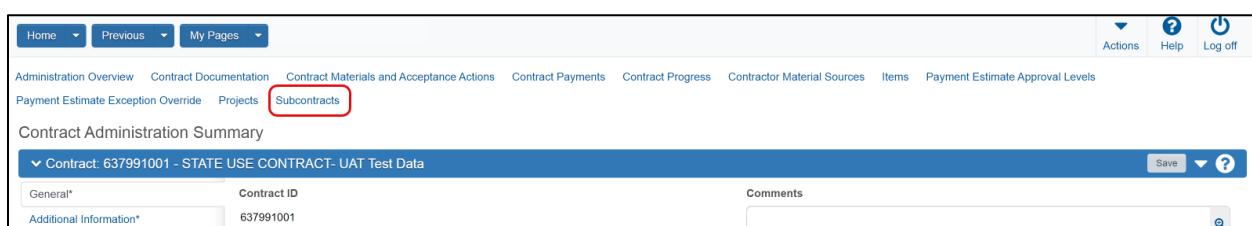
2. Search for and select the contract by clicking the **Contract ID** link.



The screenshot shows the 'Contract Administration Overview' page with a search bar containing '637991' and a red arrow pointing to it. The table below shows a single contract entry with the ID '637991001' highlighted with a red box.

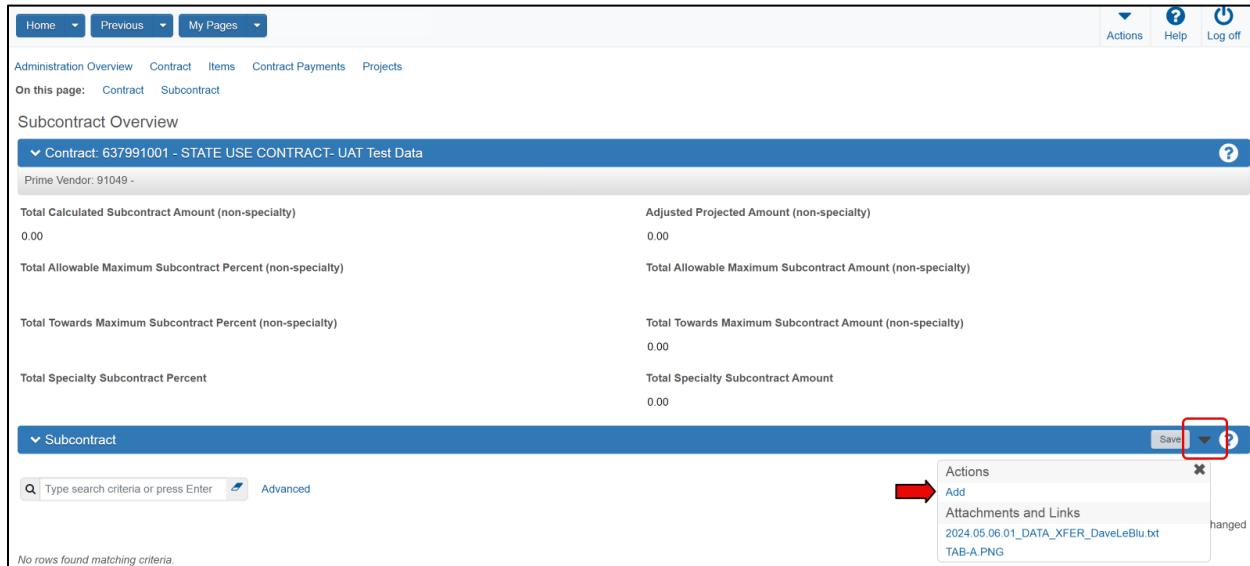
Contract	Cont Nbr	Description	Prime	Awarded Amo...	Current Amt
637991001	09211303	STATE USE CONTRACT- UAT Test Data	91049 - FOUTSCO PAVING COMPANY, LLC	\$31,127.94	\$0.00

3. From the Contract Administration Summary, click the **Subcontracts** quick link.



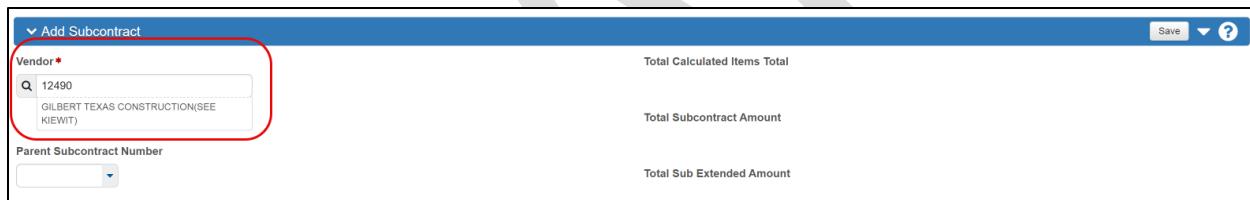
The screenshot shows the 'Contract Administration Summary' page with the 'Subcontracts' quick link highlighted with a red box. The interface includes tabs for 'Contract Documentation', 'Contract Materials and Acceptance Actions', and 'Contract Payments'.

4. On the Subcontract Summary page, click the component **Actions** menu.
5. Click the **Add** action.



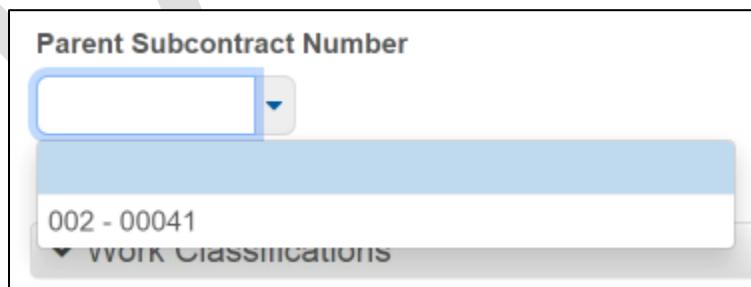
The screenshot shows the 'Subcontract Overview' page for Contract 637991001. The 'Actions' menu is open, and the 'Add' option is highlighted with a red arrow. The page displays various subcontract metrics and a search bar for subcontractors.

6. In the **Vendor** field, enter the vendor, by number or begin typing the vendor's name selected to work on the contract.



The screenshot shows the 'Add Subcontract' page. The 'Vendor' field is highlighted with a red box. The dropdown menu shows '12490 GILBERT TEXAS CONSTRUCTION(SEE KIEWIT)'. Other fields on the page include 'Parent Subcontract Number' and various total amounts.

7. If this is a tier 2 or lower subcontract, in the **Parent Subcontract Number** field, click the drop-down arrow and select the parent subcontract from the dropdown list. Previously entered subcontractors will be available to choose as a Parent, if needed.



The screenshot shows a dropdown menu for 'Parent Subcontract Number' with the value '002 - 00041' selected. Below the dropdown, there is a section for 'WORK CLASSIFICATIONS'.

8. Click the **Save** button.

If the subcontractor request is identified as a Trucker, follow the following steps:

1. Click the **Trucker** check box if this subcontractor provides trucking services for the contract.
2. Click the **Save** button.

Subcontract Information

<input type="checkbox"/>	Supplier
<input type="checkbox"/>	Trucker
<input type="checkbox"/>	Subcontract Amount

If the subcontractor request is identified as a Supplier, follow the following Steps:

1. Click the **Supplier** check box if this vendor is a supplier for the contract.
2. Click the **Save** button.

Subcontract Information

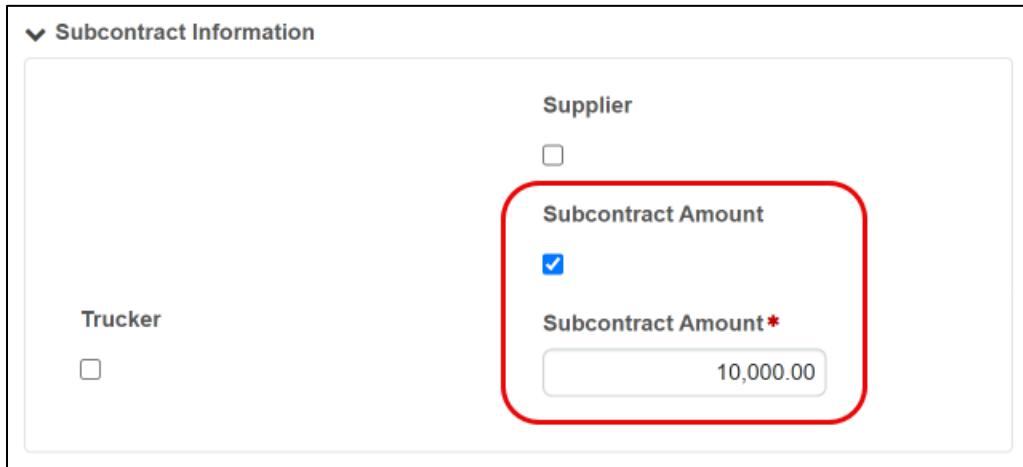
<input type="checkbox"/>	Trucker
<input type="checkbox"/>	Supplier
<input type="checkbox"/>	Subcontract Amount

3. Click the **Subcontract Amount** check box.

Subcontract Information

<input type="checkbox"/>	Supplier
<input type="checkbox"/>	Trucker
<input checked="" type="checkbox"/>	Subcontract Amount
Subcontract Amount*	

4. Enter the dollar value of the subcontract agreement in the **Subcontract Amount**.



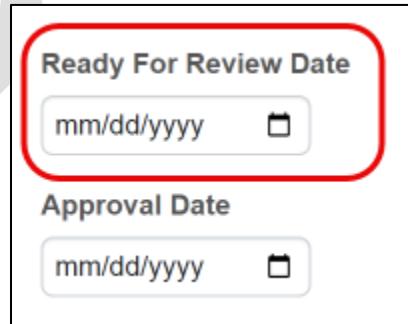
The screenshot shows a form titled "Subcontract Information". On the left, there are two checkboxes: "Supplier" (unchecked) and "Trucker" (unchecked). On the right, there is a section titled "Subcontract Amount" which contains a checked checkbox and a text input field containing "10,000.00". The "Subcontract Amount" section is highlighted with a red box.

5. Include additional information, as applicable, in the **Comments**.



The screenshot shows a form titled "Comments" with a large, empty text area for input.

6. Enter the **Ready for Review Date**. This date is required for the District Construction Office to be able to enter the Approval Date.



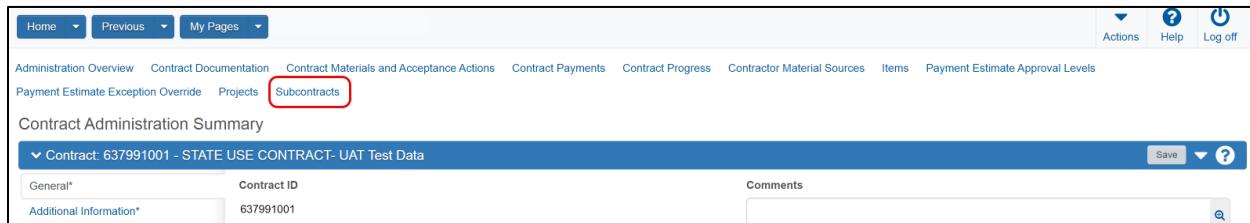
The screenshot shows two date input fields. The top field is labeled "Ready For Review Date" and the bottom field is labeled "Approval Date". Both fields include a date input box and a calendar icon. The "Ready For Review Date" field is highlighted with a red box.

7. Click the **Save** button.

- **Note:** The calculated amounts will be populated after the record is saved.

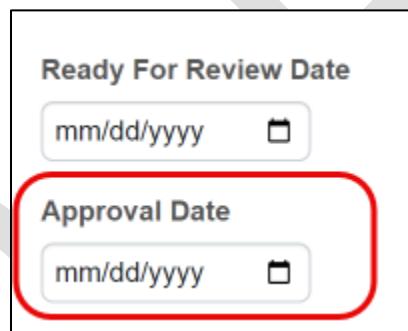
Approving a Subcontract Request – District Construction Office

1. The Area Office will notify the District Construction office of the need to review the Subcontract(s) for Review.
2. From the **Construction** component, select the **Contract Administration** link.
3. Search for and select the contract by clicking the **Contract ID** link.
4. From the Contract Administration Summary, click the **Subcontracts** quick link.



The screenshot shows a web-based application interface for contract administration. At the top, there are navigation links: Home, Previous, My Pages, Actions, Help, and Log off. Below these are several tabs: Administration Overview, Contract Documentation, Contract Materials and Acceptance Actions, Contract Payments, Contract Progress, Contractor Material Sources, Items, Payment Estimate Approval Levels, Payment Estimate Exception Override, Projects, and Subcontracts. The Subcontracts tab is highlighted with a red box. The main content area is titled 'Contract Administration Summary' and shows a sub-section for 'Contract: 637991001 - STATE USE CONTRACT- UAT Test Data'. This section includes tabs for General*, Contract ID (set to 637991001), and Additional Information*. On the right, there are 'Comments' and 'Save' buttons. A search bar with a magnifying glass icon is also present.

5. The District Construction office, after verifying the subcontractor information, will enter in the **Approval Date** field, the date the subcontract was approved.



The screenshot shows a date input field with a red box around the 'Approval Date' label. The field is labeled 'Ready For Review Date' and 'mm/dd/yyyy' with a calendar icon. Below it is another date input field labeled 'Approval Date' and 'mm/dd/yyyy' with a calendar icon.

Adding Bid Items to a Subcontract

Navigation: Construction > Contract Administration > Subcontracts quick link > Sub Num link

Note: These steps are not currently applicable.

1. From the Subcontract Summary, click the **Items** tab.
2. Click the **Select Items** button.
3. Search for and select the items to add to the subcontract.
4. Click the **Add to Subcontract** button.
5. Expand the row to enter information for the new subcontract item.
6. In the **Quantity** field, enter the number of units of the item to be included on this subcontract.
7. In the **Subcontract Unit Price** field, enter the unit price for the item to be paid to the subcontractor by the prime contractor.
8. Click the **Save** button.
9. Click the **Detail** tab.

Reviewing Subcontract Items

Navigation: Construction > Contract Administration > Subcontracts quick link > Sub Num link

Note: This is only applicable if subcontract items are entered.

1. From the Subcontract Summary, click the **Items** tab.
2. Review the following fields of each item for accuracy:
 - **Quantity**
 - **Unit of Measure**
 - **Prime Unit Price**
3. Once all items have been verified, click the **Detail** tab.
4. If any information is updated, click the **Save** button.