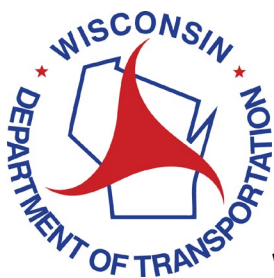


# Contract Negotiation in Masterworks

Fall 2018



Wisconsin Department of Transportation

Version 1.1

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# Version Notes

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## Version 1.1

- Revise sectioning in section 1 and add additional content.
- Add subsection to section 3 for copying rate cards.
- Add clarifications to section 5.

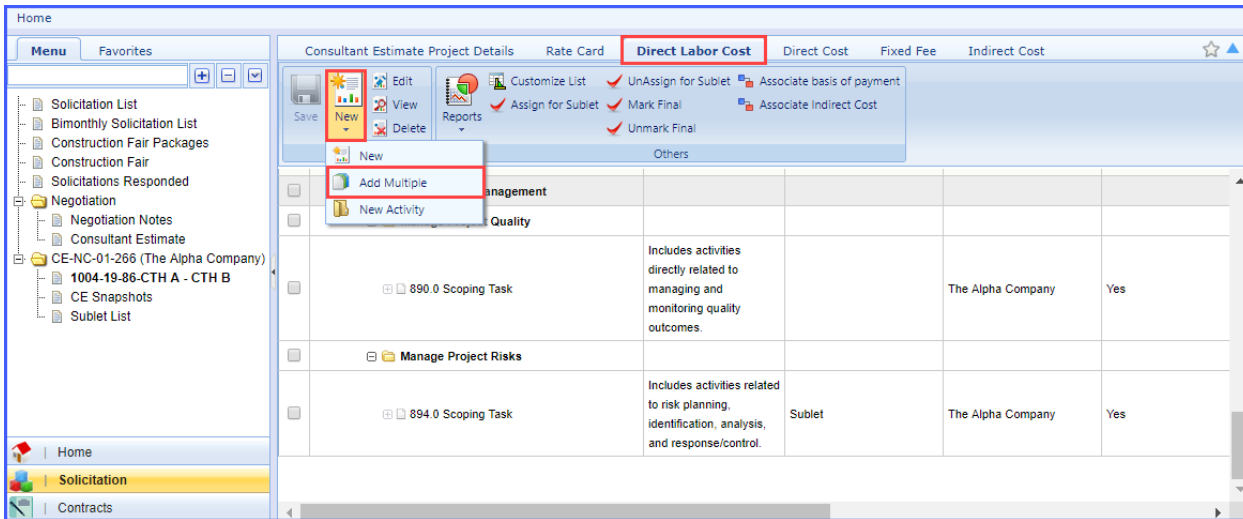
# 1 General Masterworks Information

## 1.1 Consultant/WisDOT

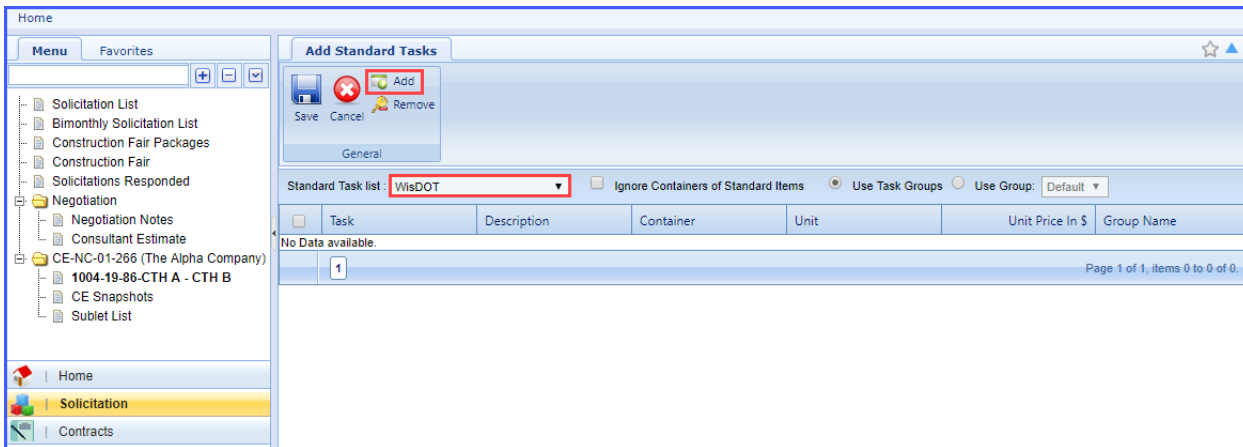
### 1.1.1 Add a new task

#### 1.1.1.1 Add a new task from the library

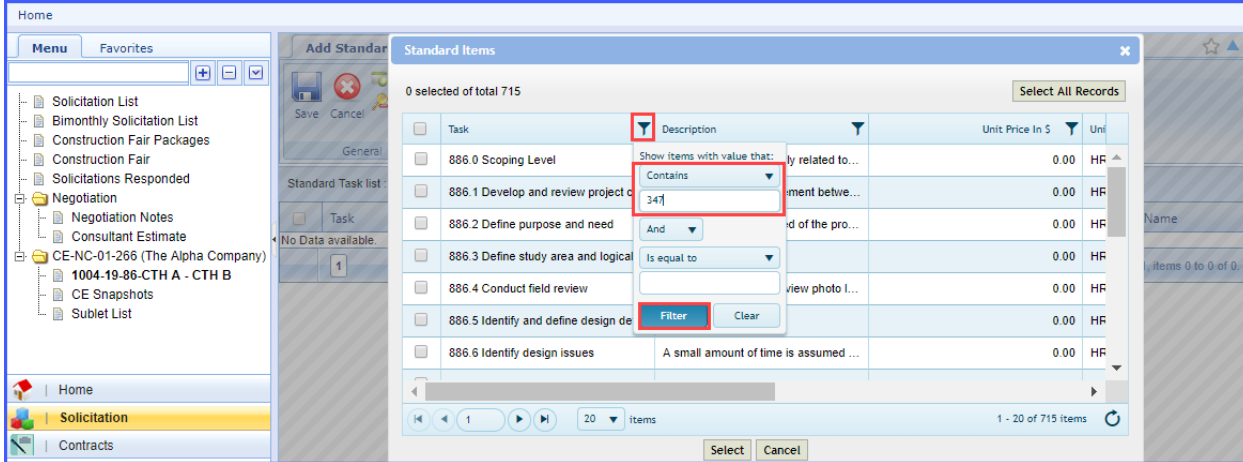
To add a new task from the task library, start on the **Direct Labor Cost** tab of the Consultant Estimate. In the ribbon, click **New** and then click **Add Multiple**.



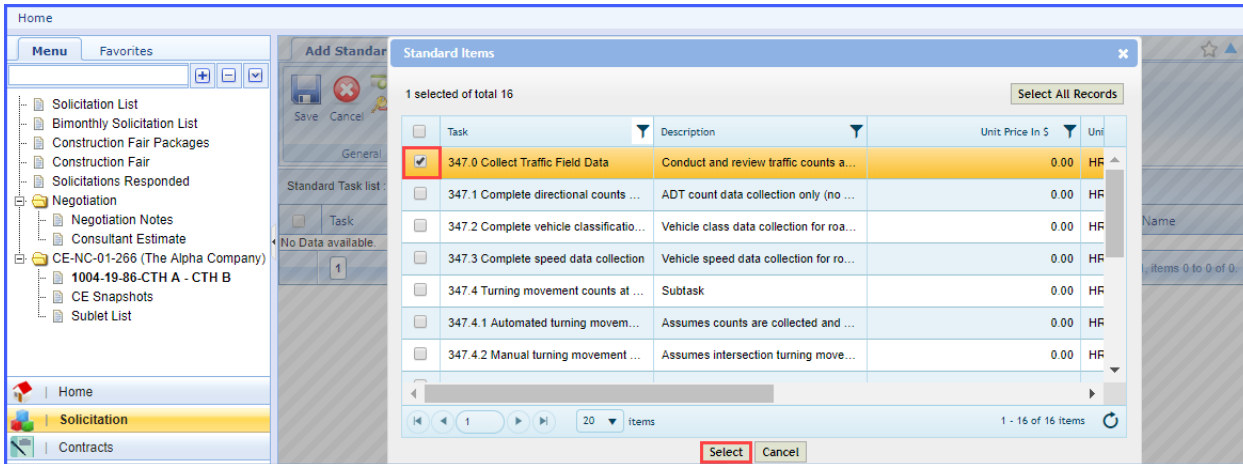
Select WisDOT from the dropdown list next to Standard Task list and click **Add**.



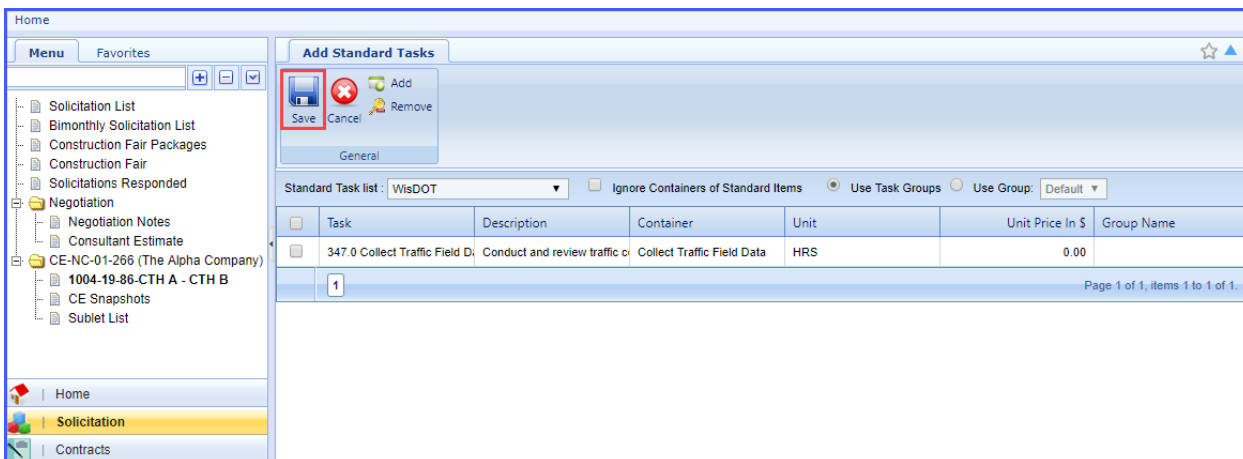
Use the filter to search for the task to be added.



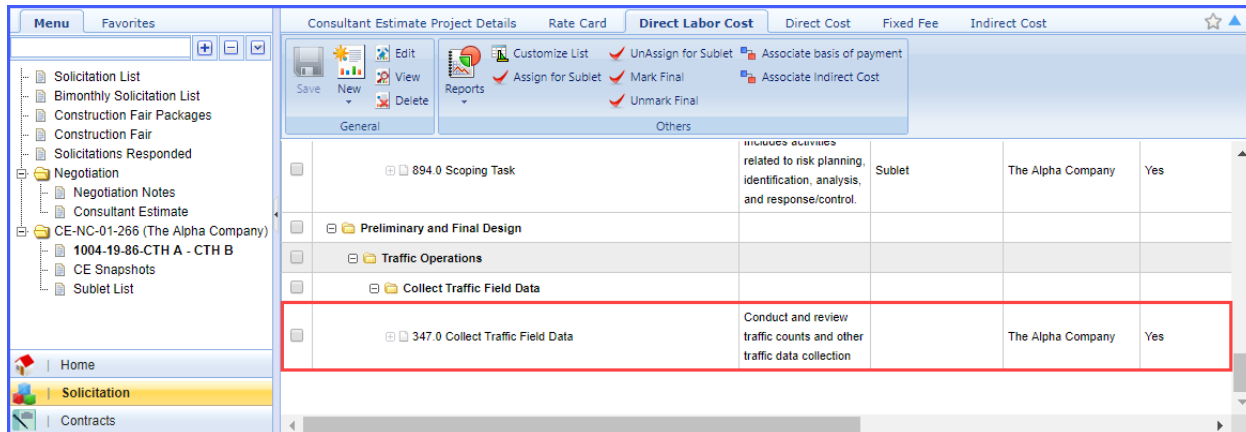
Check the box next to the task(s) to be added and click **Select**. Note: multiple tasks may be selected and added at the same time.



Click **Save** to add the task to the task list.



The task has now been added to the task list.

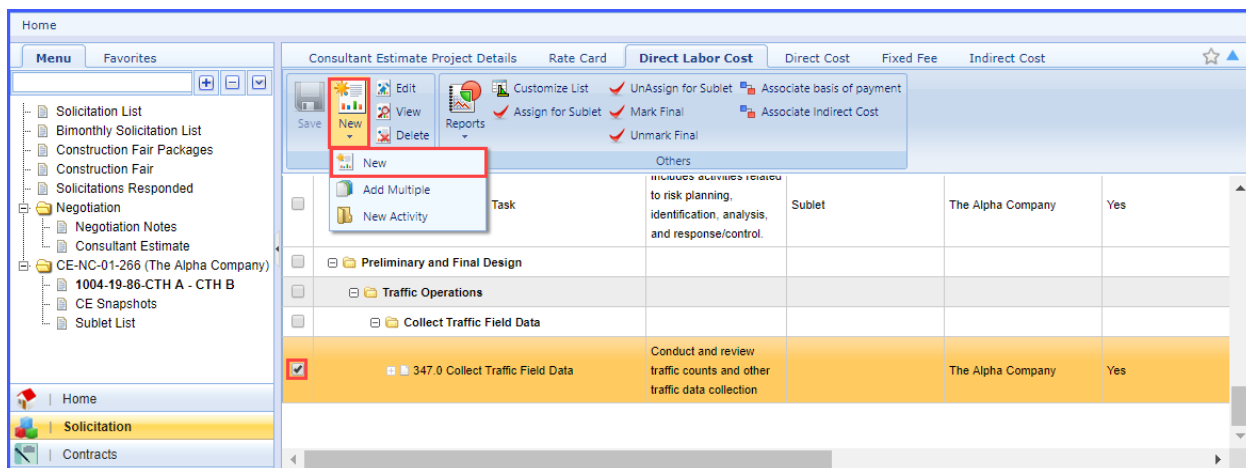


### 1.1.1.2 Create a new task

In some cases, a new task that does not exist in WisDOT's library needs to be created. Standard tasks should be used whenever possible. An example of when a new task needs to be created is when entering in a cost per unit.

**Please coordinate with WisDOT before creating a new task.**

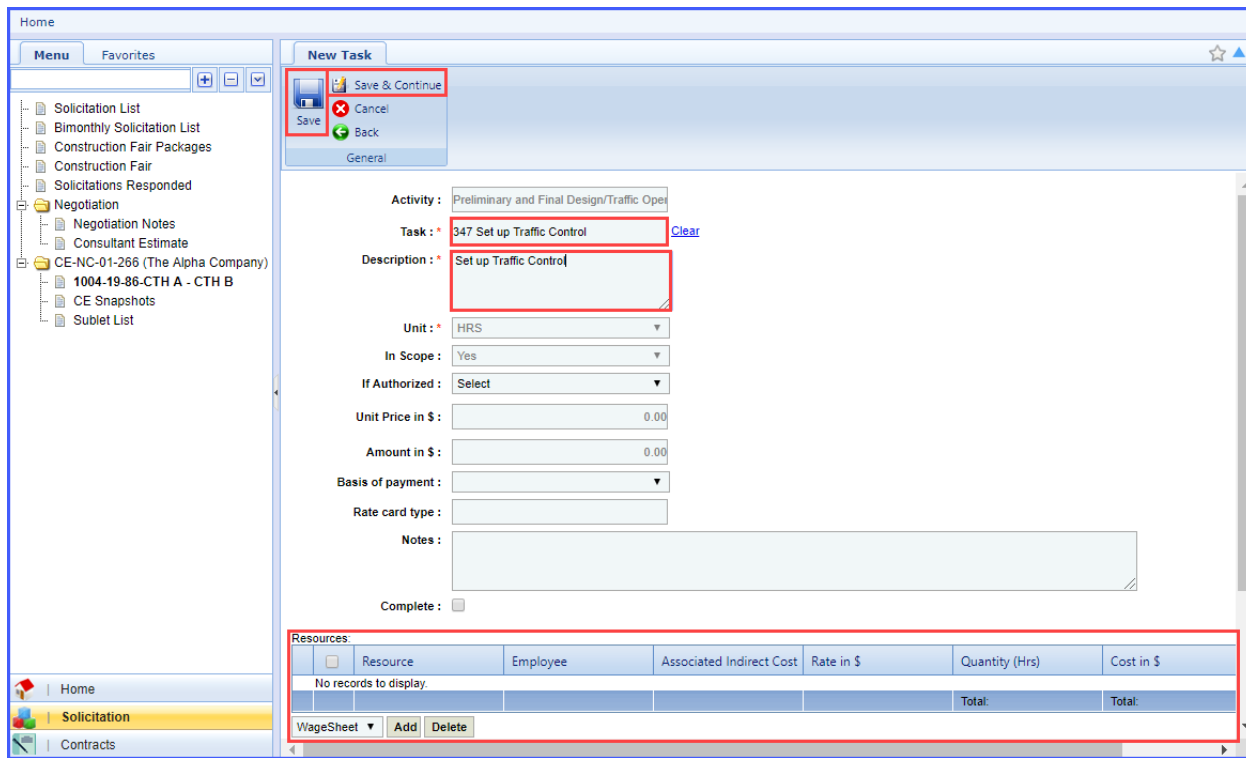
Select the task that will become the parent task, click **New** in the ribbon and click **New** in the dropdown.



Click **OK** on the warning message that appears.

**Any resource or cost information that has been added to that task will be deleted.**

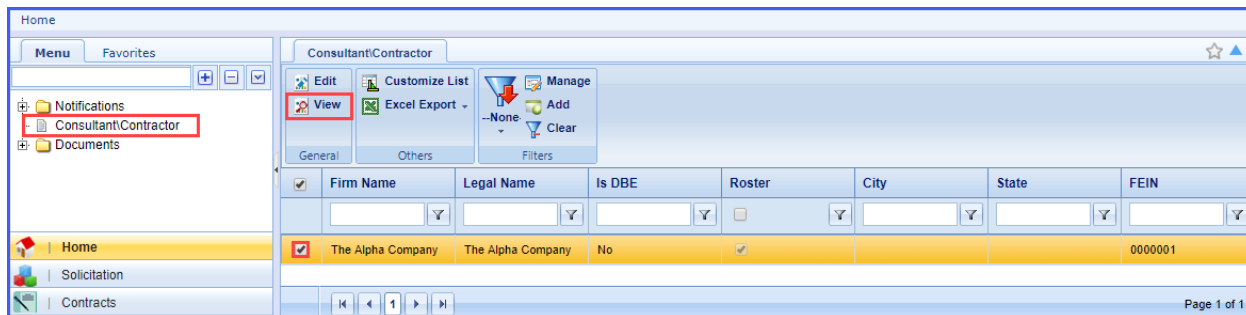
Enter the new task name in the Task field. This should contain the activity code of the parent task. Enter a short description of the task, add resources and costs to the task and click **Save**. If more than one new task will be added to the activity, click **Save & Continue** to create another new task.



## 1.2 Consultant

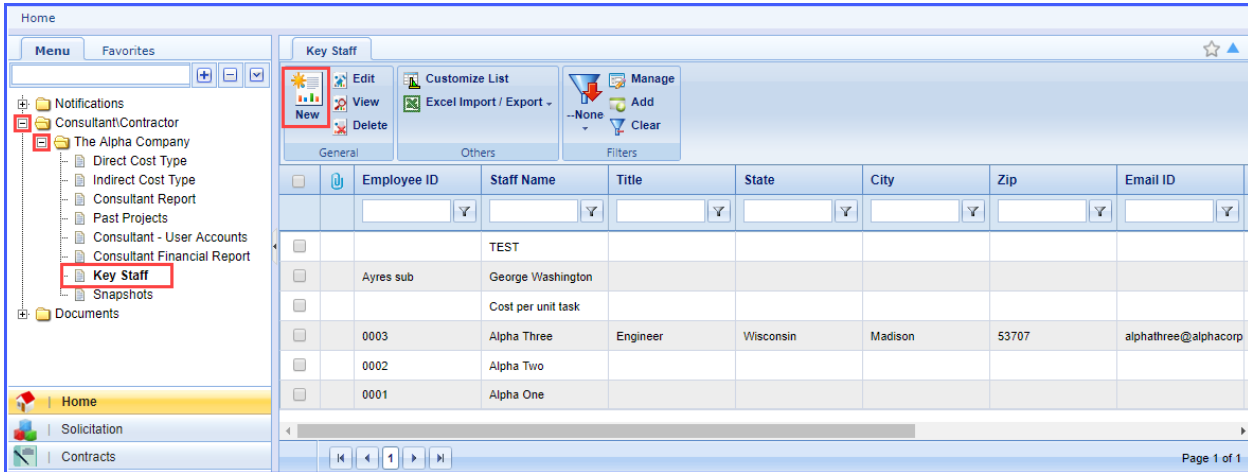
### 1.2.1 Add key staff

Click the **Consultant\Contractor** link, check the box next to the firm in the middle of the page and click **View**.



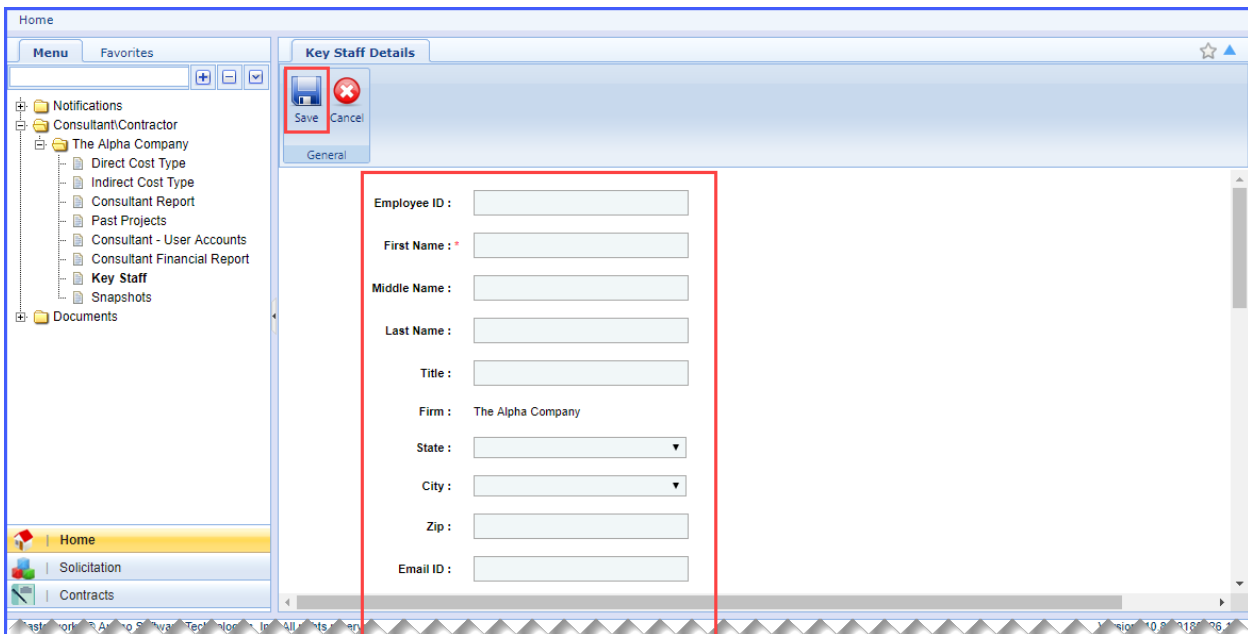


Expand the folders for Consultant\Contractor and the consultant firm. Click on the **Key Staff** link and click **New**.



Employee ID	Staff Name	Title	State	City	Zip	Email ID
	TEST					
	Ayres sub	George Washington				
	Cost per unit task					
0003	Alpha Three	Engineer	Wisconsin	Madison	53707	alphathree@alphacorp
0002	Alpha Two					
0001	Alpha One					

Fill out the employee information and click **Save**.



Employee ID :

First Name :

Middle Name :

Last Name :

Title :

Firm : The Alpha Company

State :

City :

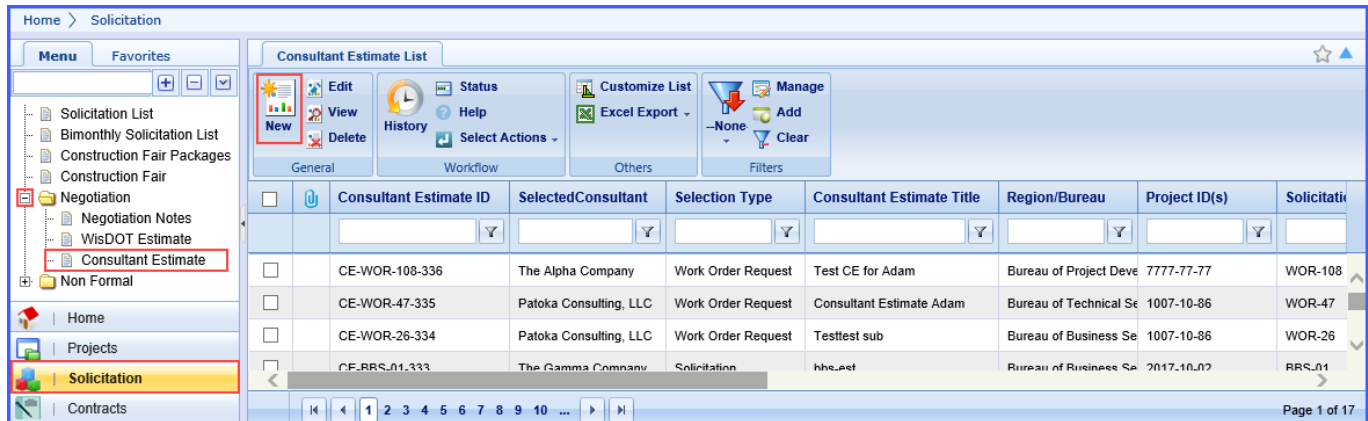
Zip :

Email ID :

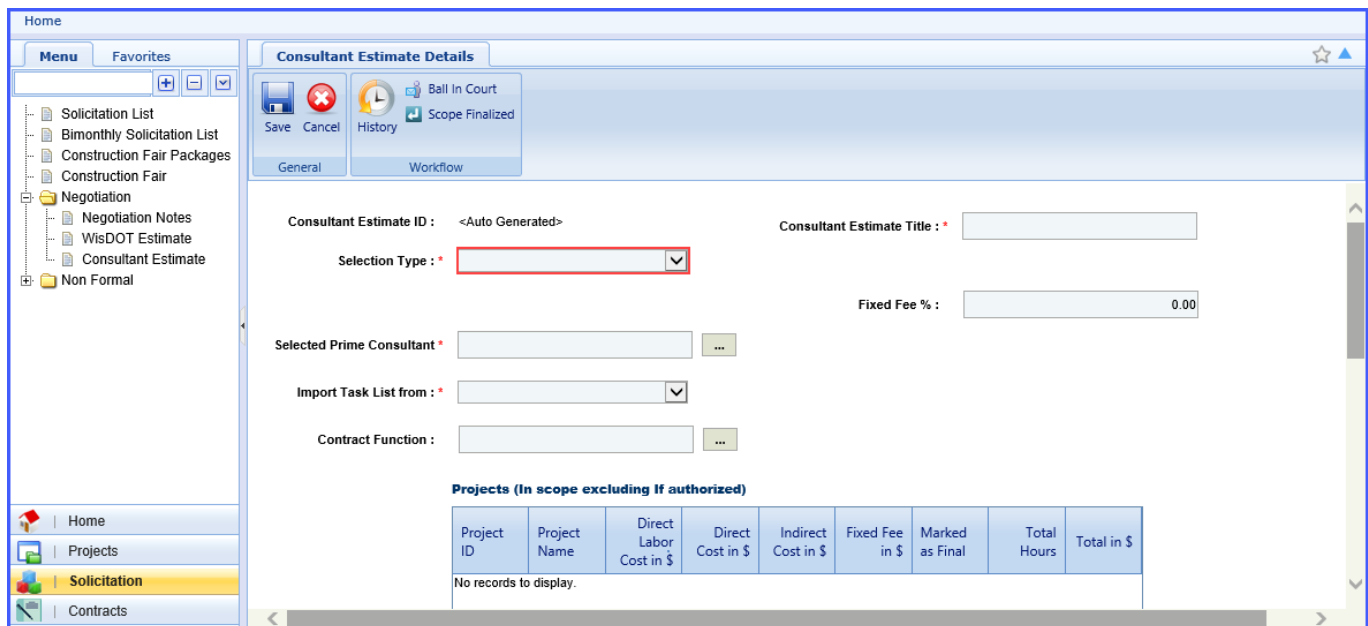
## 2 Consultant Estimate – WisDOT

### 2.1 Start a Negotiation

Navigate to the **Solicitation** module, expanding the **Negotiation** folder in the left navigation and clicking **Consultant Estimate**. Click **New**.



Pick the **Selection Type** from the dropdown menu. This will change the autofill fields.



If beginning a negotiation for a bimonthly solicitation package proceed to section 2.2 *Bimonthly Solicitation*.

If beginning a negotiation for a construction fair package proceed to section 2.3 *Construction Fair*.

## 2.2 Bimonthly Solicitation

Add a **Consultant Estimate Title**. Use the ellipses to select the **Bimonthly Solicitation Title**, which is the month and year of the solicitation. Use the ellipses to select the **Solicitation ID**, this is also known as the package ID. Use the ellipses to select the **Selected Prime Consultant**; this should be the number one ranked consultant from the shortlist, unless permission has been given to go to the next ranked consultant. Select Solicitation Task List from the dropdown in the **Import Task List from** field. Choose a **Negotiation Submission Due Date**; this is a date for a check in.

The screenshot shows the 'Consultant Estimate Details' form. The left sidebar contains a navigation menu with 'Solicitation' selected. The main form area includes the following fields:

- Consultant Estimate ID: <Auto Generated>
- Selection Type: Solicitation
- Bimonthly Solicitation Month/Year: March 2015
- Region/Bureau: Southwest Region
- Selected Prime Consultant: The Della Company
- Import Task List from: Solicitation Task List
- Consultant Estimate Title: March 2015 SW-01
- Bimonthly Solicitation Title: March 2015
- Contract Function: Design Services
- Solicitation ID: SW-01
- Fixed Fee %: 7.50
- Negotiation Submission Due Date: 10/31/2018

Below the form is a table titled 'Projects (In scope excluding If authorized)':

Project Name	Direct Labor	Direct Cost	Indirect Cost	Fixed Fee	Marked as	Total Hours	Total in \$	limit
ILLINOIS S	0.00	0.00	0.00	0.00		0.00	0.00	CTH N INTE

### 2.3 Construction Fair

Add a **Consultant Estimate Title**. Use the ellipses to select the **Construction Fair Title**, which is the year of the solicitation. Use the ellipses to select the **Construction Fair Package ID**. If the project leader (consultant/WisDOT) has changed, update the **Fixed Fee %**. Use the ellipses to select the **Selected Prime Consultant**; this should be the number one ranked consultant from the shortlist, unless permission has been given to go to the next ranked consultant. Select Construction Fair Package from the dropdown in the **Import Task List from** field. Choose a **Negotiation Submission Due Date**; this is a date for a check in. Use the ellipses to add a contract function; in most cases this will be Construction Services.

Home

Menu Favorites

- Solicitation List
- Bimonthly Solicitation List
- Construction Fair Packages
- Construction Fair
- Negotiation
  - Negotiation Notes
  - WisDOT Estimate
  - Consultant Estimate
- Non Formal

Home | Projects | **Solicitation** | Contracts

Consultant Estimate Details

Save Cancel History Scope Finalized

General Workflow

Consultant Estimate ID : <Auto Generated>

Consultant Estimate Title : \* Con Fair 2050 SW-01

Selection Type : \* Construction Fair

Construction Fair Month/Year : January 2050

Construction Fair Package ID : \* SW-01

Region/Bureau : Southwest Region

Selected Prime Consultant \* The Delta Company

Import Task List from : \* Construction Fair Package

Contract Function : Construction Services

Construction Fair Title : \* January 2050

Construction Fair Number : 5001

Fixed Fee % : 7.25

Negotiation Submission Due Date : 10/31/2018

**Projects (In scope excluding If authorized)**

Project Name	Direct Labor	Direct Cost	Indirect Cost	Fixed Fee	Marked as	Total Hours	Total in \$	Limit
ILLINOIS S	0.00	0.00	0.00	0.00		0.00	0.00	CTH N INTE

### 2.4 Add Tasks to the Scope

If a task needs to be added to the scope before the negotiation is sent to the consultant click **Save**.

Home

Menu Favorites

- Solicitation List
- Bimonthly Solicitation List
- Construction Fair Packages
- Construction Fair
- Negotiation
  - Negotiation Notes
  - WisDOT Estimate
  - Consultant Estimate
- Non Formal

Home | Projects | **Solicitation** | Contracts

Consultant Estimate Details

Save Cancel History Scope Finalized

General Workflow

Consultant Estimate ID : <Auto Generated>

Consultant Estimate Title : \* Con Fair 2050 SW-01

Selection Type : \* Solicitation

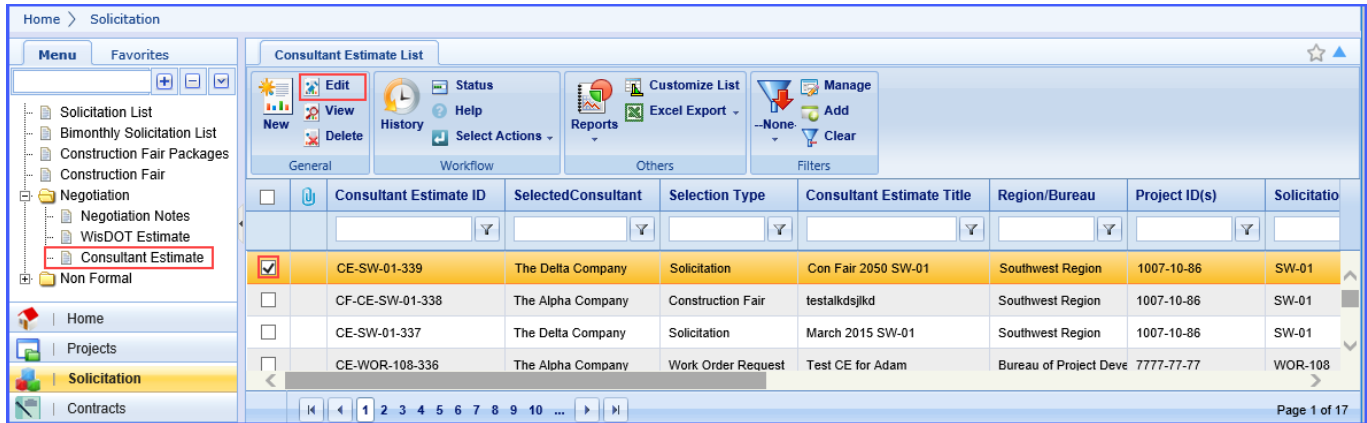
Bimonthly Solicitation Month/Year : March 2015

Region/Bureau : Southwest Region

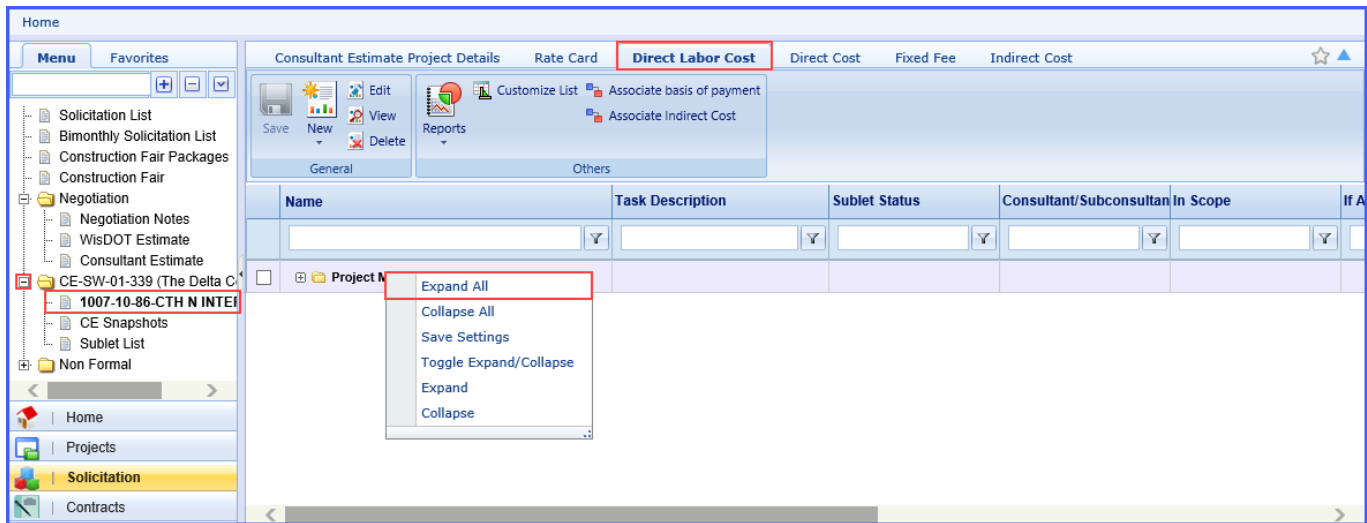
Contract Function : Design Services

Solicitation ID : \* SW-01

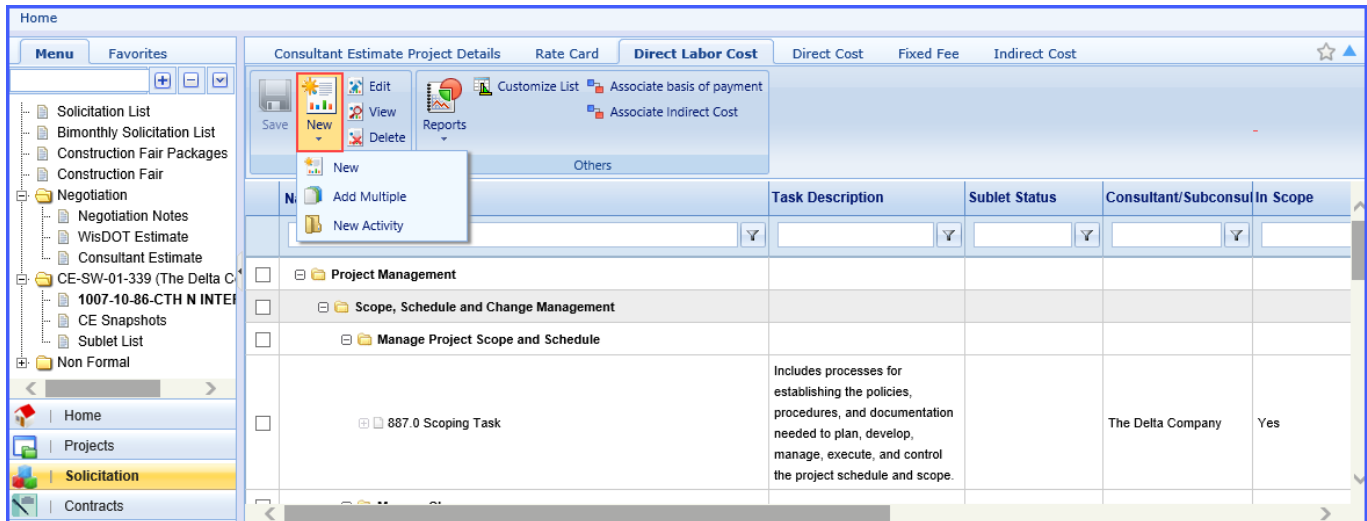
Check the box next to the negotiation in the Consultant Estimate list. Click **Edit**.



Expand the folder in the left navigation pane. Click on the link with the project ID. Click on the **Direct Labor Cost** tab on the top of the screen. Right click on the folder(s) in the middle of the screen and click **Expand All** to view all tasks currently under negotiation.



Use the **New** to add task(s) as outlined in section [Add a New Task](#) in this guide.



## 2.5 Send the Negotiation to the Consultant

If no changes needed to be made to the task list click Scope Finalized.

The screenshot shows the 'Consultant Estimate Details' form. The 'Workflow' section contains buttons for 'Save', 'Cancel', 'History', and 'Scope Finalized'. The 'Scope Finalized' button is highlighted with a red box. The form fields include:

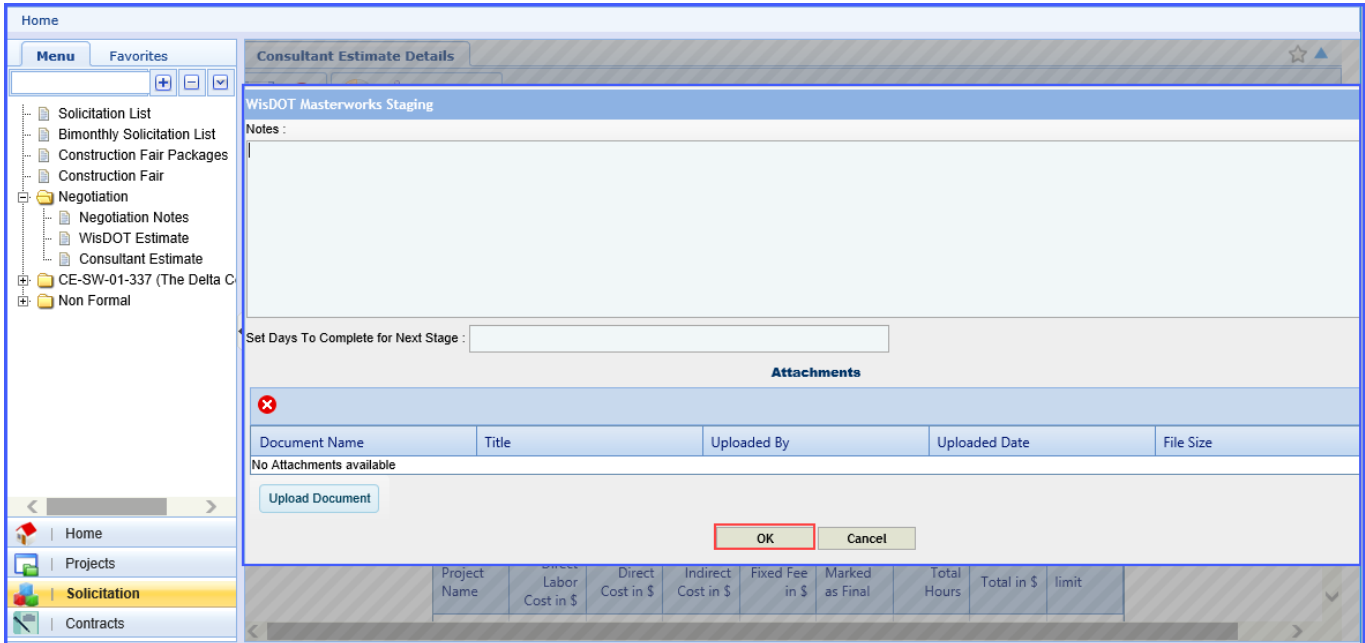
- Consultant Estimate ID: CE-SW-01-339
- Consultant Estimate Title: Con Fair 2050 SW-01
- Selection Type: Solicitation
- Bimonthly Solicitation Month/Year: March 2015
- Contract Function: Design Services
- Solicitation ID: SW-01
- Region/Bureau: Southwest Region
- Selected Prime Consultant: The Delta Company
- Fixed Fee %: 7.50

If changes were made to the task list, or if the estimate was saved in Draft status before being submitted return to the Consultant Estimate list. Check the box next to the negotiation and click **Select Actions** and **Scope Finalized**.

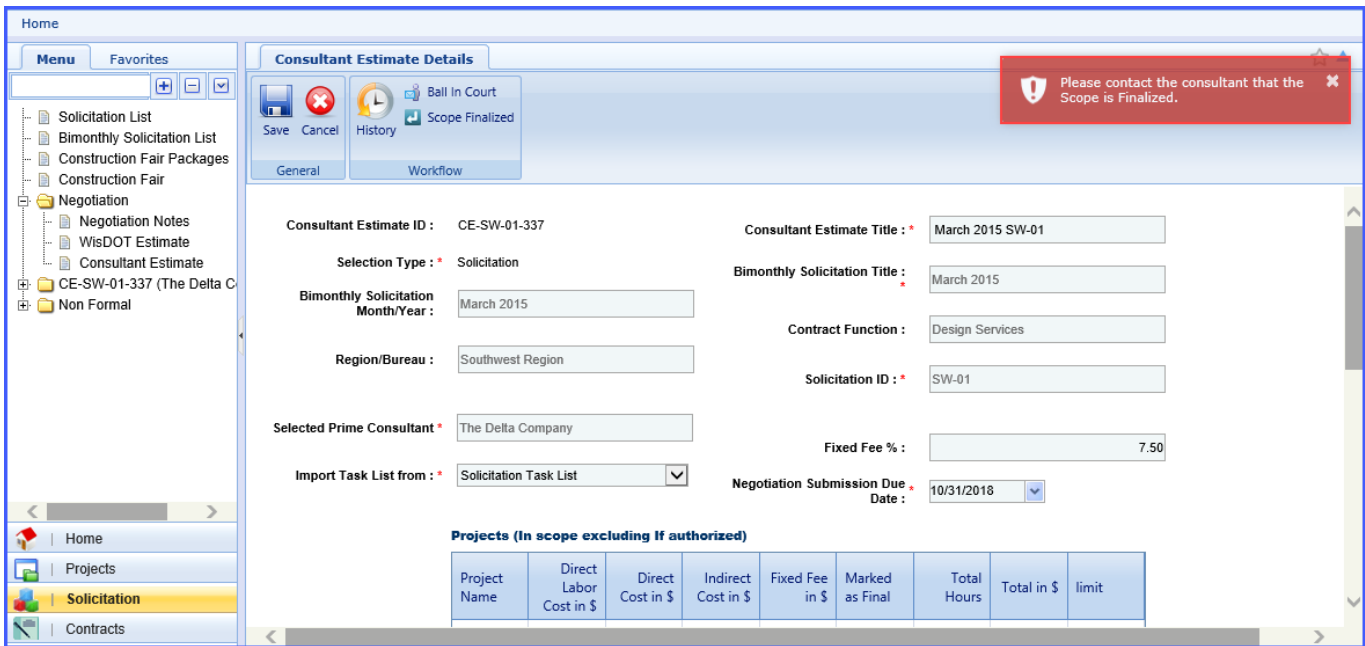
The screenshot shows the 'Consultant Estimate List' table. The 'Select Actions' button in the toolbar is highlighted with a red box, and its dropdown menu is open, showing 'Scope Finalized'. The table contains the following data:

	Consultant Estimate ID	Selected Consultant	Selection Type	Consultant Estimate Title	Region/Bureau	Project ID(s)	Solicitation
<input checked="" type="checkbox"/>	CE-SW-01-339	The Delta Company	Solicitation	Con Fair 2050 SW-01	Southwest Region	1007-10-86	SW-01
<input type="checkbox"/>	CF-CE-SW-01-338	The Alpha Company	Construction Fair	testalkdsjkkd	Southwest Region	1007-10-86	SW-01
<input type="checkbox"/>	CE-SW-01-337	The Delta Company	Solicitation	March 2015 SW-01	Southwest Region	1007-10-86	SW-01
<input type="checkbox"/>	CE-WOR-108-336	The Alpha Company	Work Order Request	Test CE for Adam	Bureau of Project Deve	7777-77-77	WOR-108

Click **OK** on the acknowledgement screen. No additional notes are needed.



A red warning message will be displayed in the upper right corner of the screen indicating that the system was unable to send a message to the consultant. Please notify the consultant that it has a new negotiation to begin.

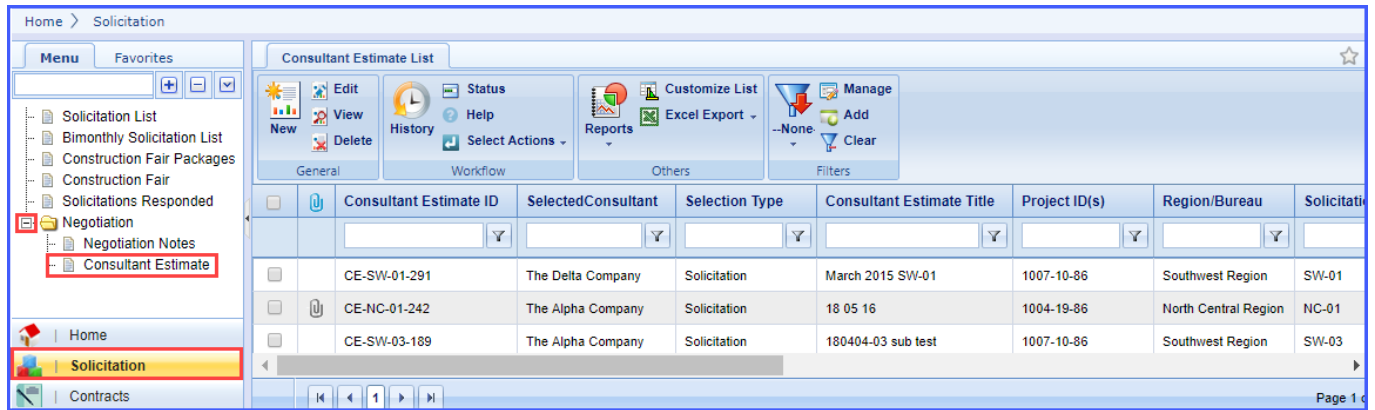


### 3 Consultant Estimate - Consultant

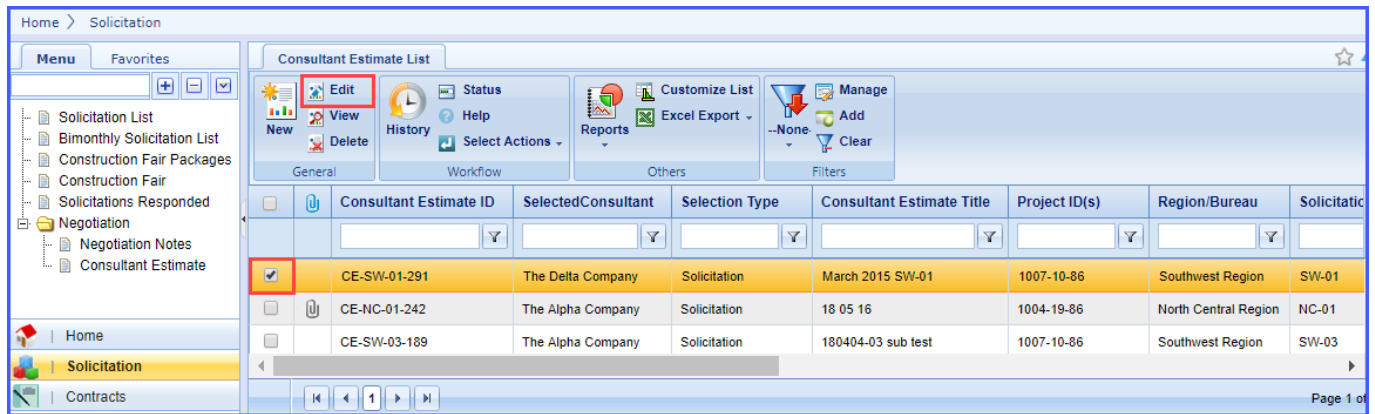
#### 3.1 Finding the Negotiation

##### 3.1.1 Prime Consultant

Navigate to the **Solicitation** module, expand the **Negotiation** folder in the left navigation and clicking **Consultant Estimate**.



Select the negotiation using the check box and click Edit.





The solicitation information is displayed on the top half of the screen.

The screenshot shows the 'Consultant Estimate Details' window. On the left is a navigation tree with 'Solicitation' selected. The main area displays the following details:

- Consultant Estimate ID : CE-SW-01-291
- Consultant Estimate Title : \* March 2015 SW-01
- Selection Type : \* Solicitation
- Bimonthly Solicitation Title : \* March 2015
- Bimonthly Solicitation Month/Year : March 2015
- Contract Function : Design Services
- Region/Bureau : Southwest Region
- Solicitation ID : \* SW-01
- Selected Prime Consultant \* The Delta Company
- Fixed Fee % : 7.50
- Import Task List from : \* Solicitation Task List
- Negotiation Submission Due Date : 10/01/2018

A summary of the negotiation cost is displayed. Any attachments included in the negotiation are included at the bottom. If the negotiation contains multiple projects, a separate line and subtotal will be displayed for each project.

**Attachments made at this level will be visible to the prime consultant and all subconsultants.**

The screenshot shows the 'Consultant Estimate Details' window with project cost tables and an attachments section.

**Projects (In scope excluding If authorized)**

Project Name	Direct Labor Cost in \$	Direct Cost in \$	Indirect Cost in \$	Fixed Fee in \$	Marked as Final	Total Hours	Total in \$	Limit
ILLINOIS S	0.00	0.00	0.00	0.00		0.00	0.00	CTH N INTE
	0.00	0.00	0.00	0.00		0.00	0.00	

**Projects (If authorized)**

Project Name	Direct Labor Cost in \$	Direct Cost in \$	Indirect Cost in \$	Fixed Fee in \$	Marked as Final	Total Hours	Total in \$	Limit
ILLINOIS S	0.00	0.00	0.00	0.00		0.00	0.00	CTH N INTE
	0.00	0.00	0.00	0.00		0.00	0.00	

**Notes :**

**Attachments**

Document Name	Url/Link	Title	Uploaded By	Uploaded Date	File Size
No Attachments available					

Buttons: Link Document, Upload Document

Expand the folder with the Negotiation ID in the left navigation and click on the link with the project ID. A summary of project costs is displayed.

### 3.1.2 Subconsultant

Navigate to the **Solicitation** module, expanding the **Negotiation** folder in the left navigation and clicking **Consultant Estimate**.

Consultant Estimate ID	Selected Consultant	Selection Type	Consultant Estimate Title	Region/Bureau	Project ID(s)	Solicitation ID
CE-BTS-01-296	The Alpha Company	Solicitation	CE - Solicitation - I	Bureau of Technical Se	1000-02-07, 1009-03-4	BTS-0
CE-WOR-168-295	The Alpha Company	Work Order Request	Test of Sub of Sub	Bureau of Project Deve	1234-55-55	WOR-1
CE-BPD-01-294	The Alpha Company	Solicitation	Sub Sub test	Bureau of Project Deve	1021-00-06, 1021-00-0	BPD-0
CE-SW-01-291	The Delta Company	Solicitation	March 2015 SW-01	Southwest Region	1007-10-86	SW-01
CE-NC-01-266	The Alpha Company	Solicitation	asdf	North Central Region	1004-19-86	NC-01
CE-NC-01-265	The Alpha Company	Solicitation	1850706-02	North Central Region	1004-19-86	NC-01

Check the box next to the negotiation and click **Edit**.

Home > Solicitation

Menu Favorites

Consultant Estimate List

General Workflow Others Filters

	Consultant Estimate ID	SelectedConsultant	Selection Type	Consultant Estimate Title	Region/Bureau	Project ID(s)	Solici
<input type="checkbox"/>	CE-BTS-01-296	The Alpha Company	Solicitation	CE - Solicitation - I	Bureau of Technical Se	1000-02-07, 1009-03-4	BTS-0
<input type="checkbox"/>	CE-WOR-168-295	The Alpha Company	Work Order Request	Test of Sub of Sub	Bureau of Project Deve	1234-55-55	WOR-1
<input type="checkbox"/>	CE-BPD-01-294	The Alpha Company	Solicitation	Sub Sub test	Bureau of Project Deve	1021-00-06, 1021-00-0	BPD-0
<input checked="" type="checkbox"/>	CE-SW-01-291	The Delta Company	Solicitation	March 2015 SW-01	Southwest Region	1007-10-86	SW-01
<input type="checkbox"/>	CE-NC-01-266	The Alpha Company	Solicitation	asdf	North Central Region	1004-19-86	NC-01
<input type="checkbox"/>	CE-NC-01-265	The Alpha Company	Solicitation	1850706-02	North Central Region	1004-19-86	NC-01

Page 1 of 1

Expand the folder with the negotiation title and click Sublet List. Check the box next to negotiation and click **Edit**.

Home

Menu Favorites

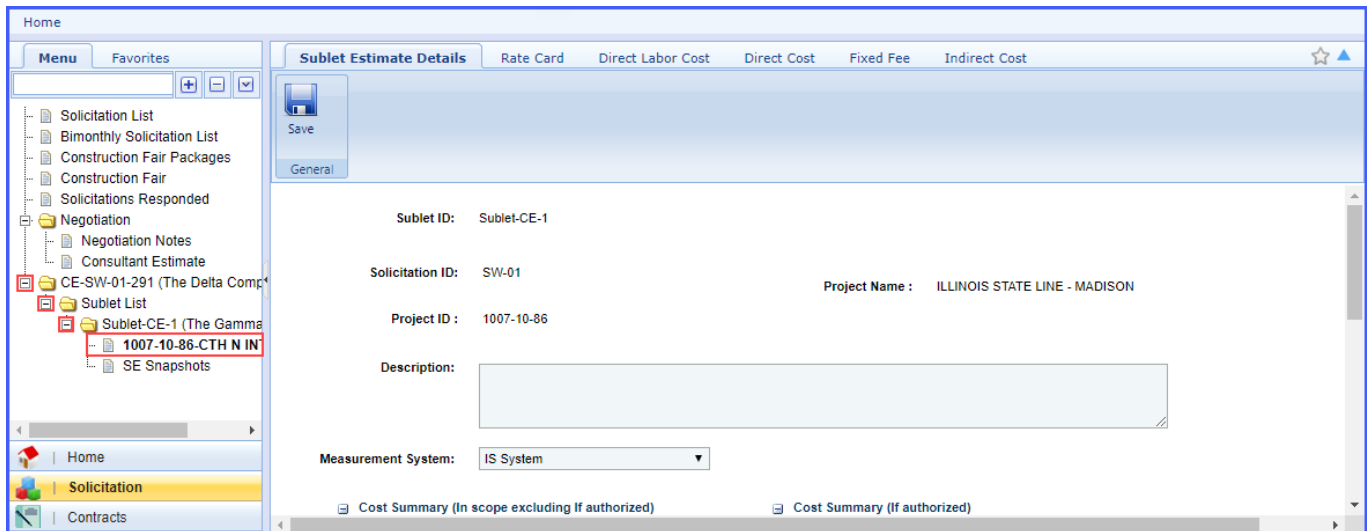
Sublet List

General Workflow Others Filters

	Sublet ID	Sublet No	Solicitation ID	Sublet By	Region/Bureau	Pending On Role(s)	Pending On User(s)	Bimc
<input checked="" type="checkbox"/>	Sublet-CE-1	291-01	SW-01	The Delta Company	Southwest Region	Administrator Consultant Ne	Adam Sellin, Administrator A	Marc

Page 1 of 1

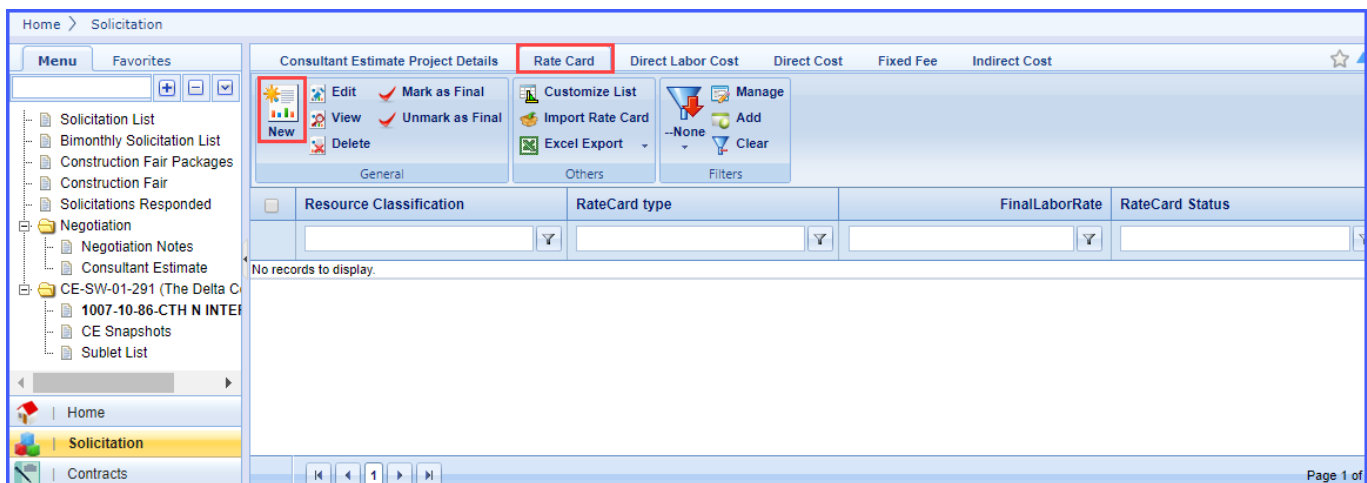
Expand the folders with the in the left navigation and click on the link with the project ID. A summary of project costs is displayed.



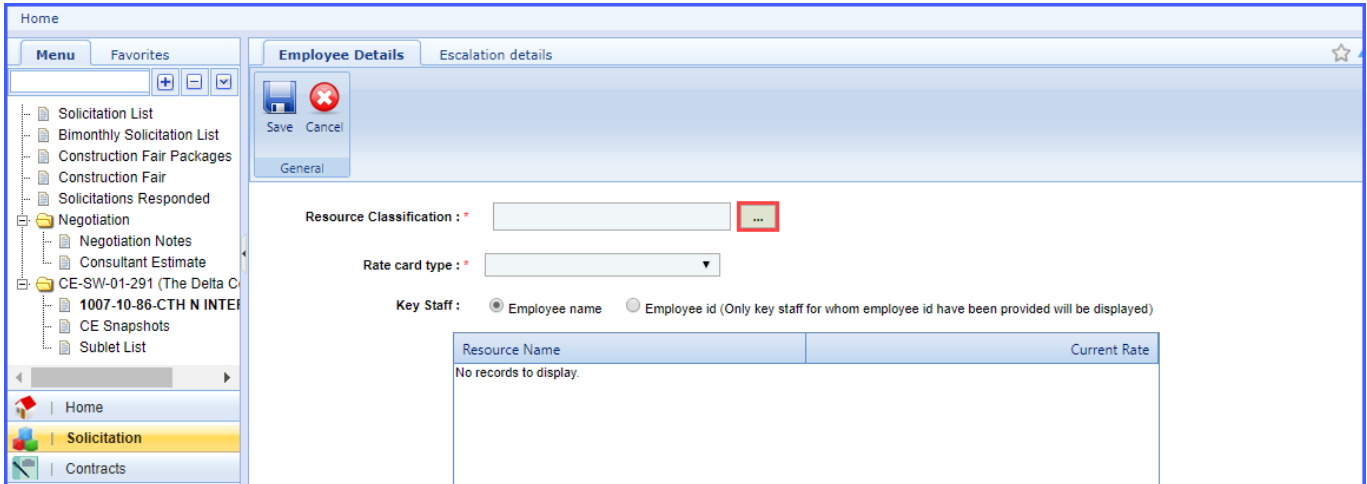
## 3.2 Create a Rate Card

### 3.2.1 Create a new rate card

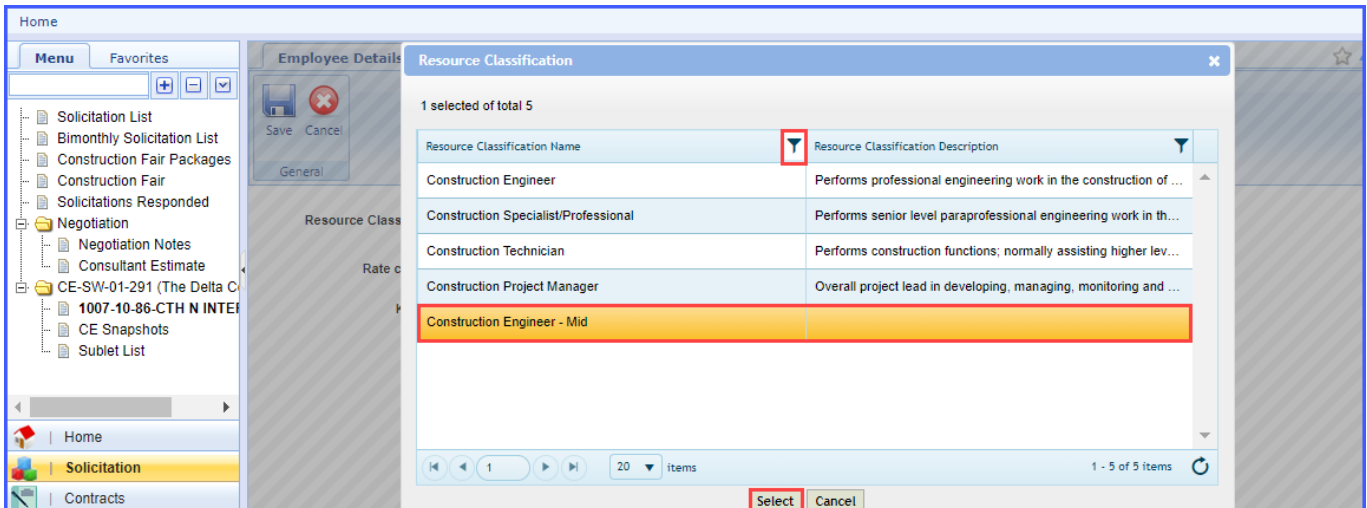
Click on the **Rate Card** tab and click **New**.



Click on the ellipses next to the **Resource Classification** field.



Use the filter to narrow the list of options, select the Resource Classification and click **Select**.



Select the **Rate Card Type** from the dropdown menu. Use Individual Wage when the basis of payment will be actual cost plus fixed fee or lump sum, NA when the basis of payment will be cost per unit and Specific Rate when the basis of payment will be specific rate of compensation.

The screenshot shows the 'Employee Details' form. The 'Resource Classification' is set to 'Construction Engineer - Mid'. The 'Rate card type' dropdown is highlighted with a red box. The 'Key Staff' section has two radio buttons: 'Employee name' (selected) and 'Employee id (Only key staff for whom employee id have been provided will be displayed)'. Below this is a table with columns 'Resource Name' and 'Current Rate', containing the text 'No records to display.'.

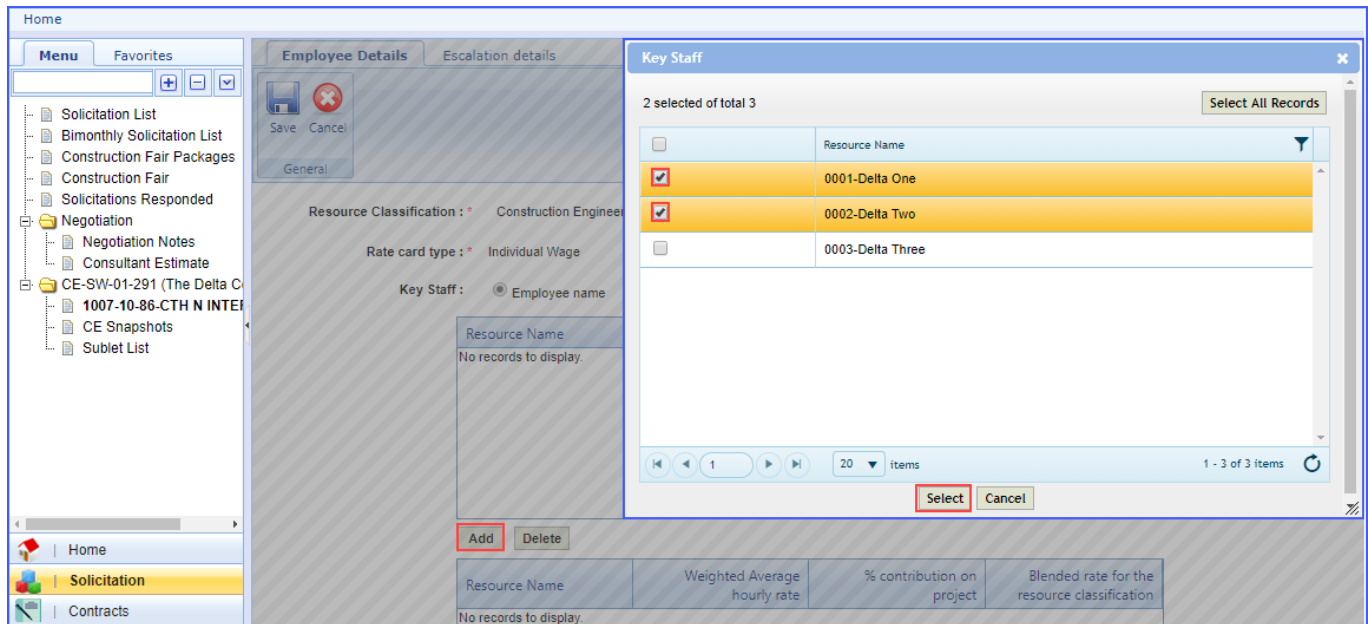
Resource Name	Current Rate
No records to display.	

Choose the option to include employee names in the contract or only employee IDs.

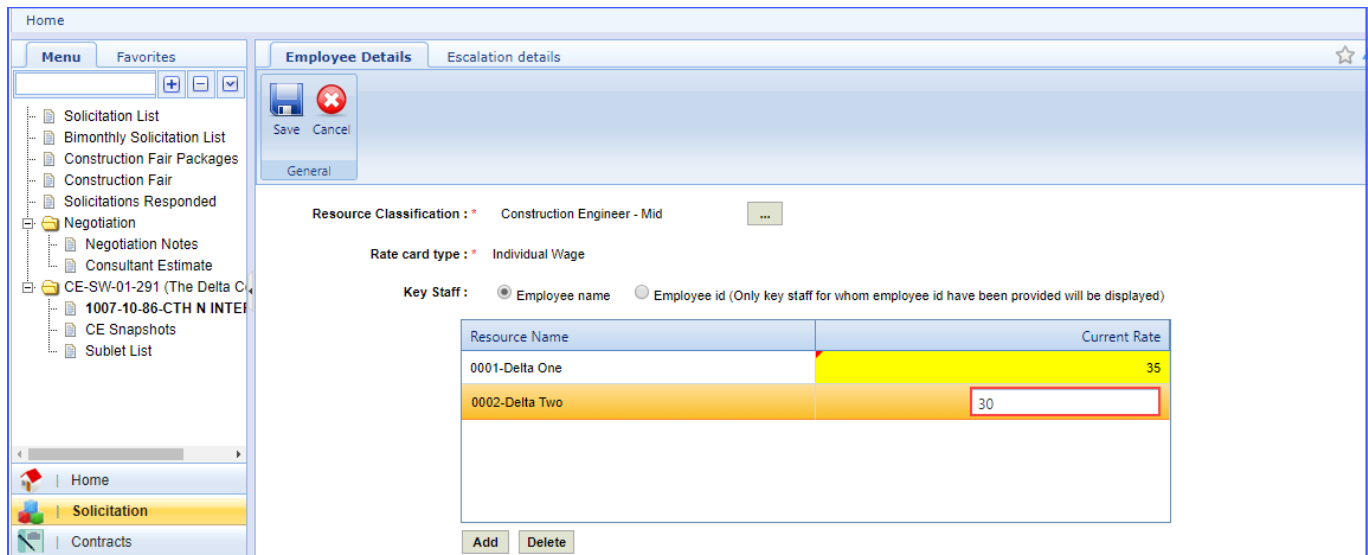
The screenshot shows the 'Employee Details' form. The 'Resource Classification' is set to 'Construction Engineer - Mid'. The 'Rate card type' dropdown is set to 'Individual Wage'. The 'Key Staff' section has two radio buttons: 'Employee name' (selected and highlighted with a red box) and 'Employee id (Only key staff for whom employee id have been provided will be displayed)'. Below this is a table with columns 'Resource Name' and 'Current Rate', containing the text 'No records to display.' and 'Add' and 'Delete' buttons.

Resource Name	Current Rate
No records to display.	

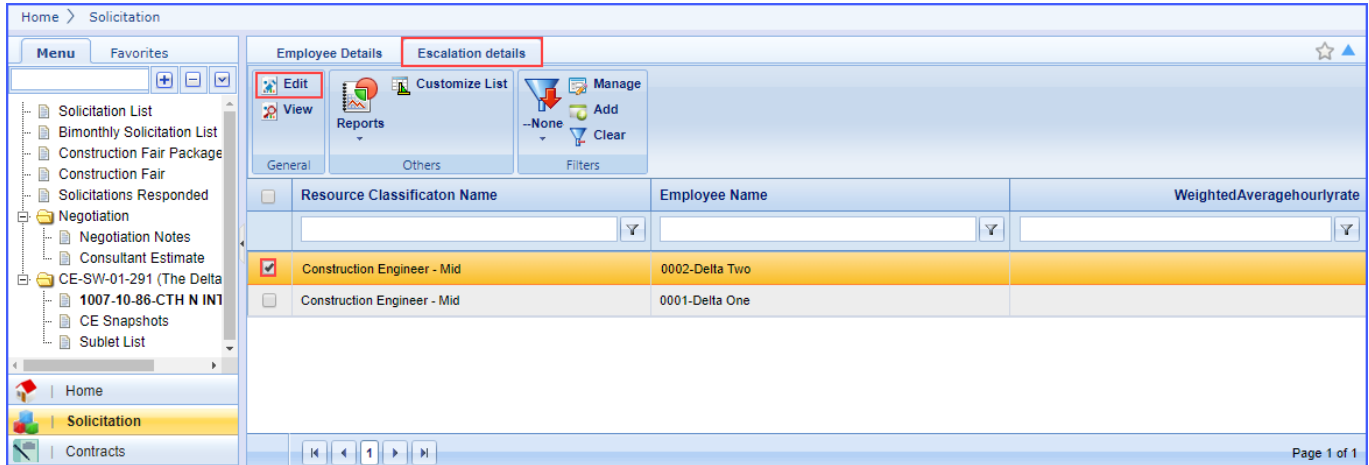
Click **Add** underneath the first table to select employees that will be part of this resource classification. On the pop up box that opens us the checkboxes to select one or more employees and click **Select**.



Double click in the box next to each employee in the column Current Rate and enter the current pay rate for each employee.

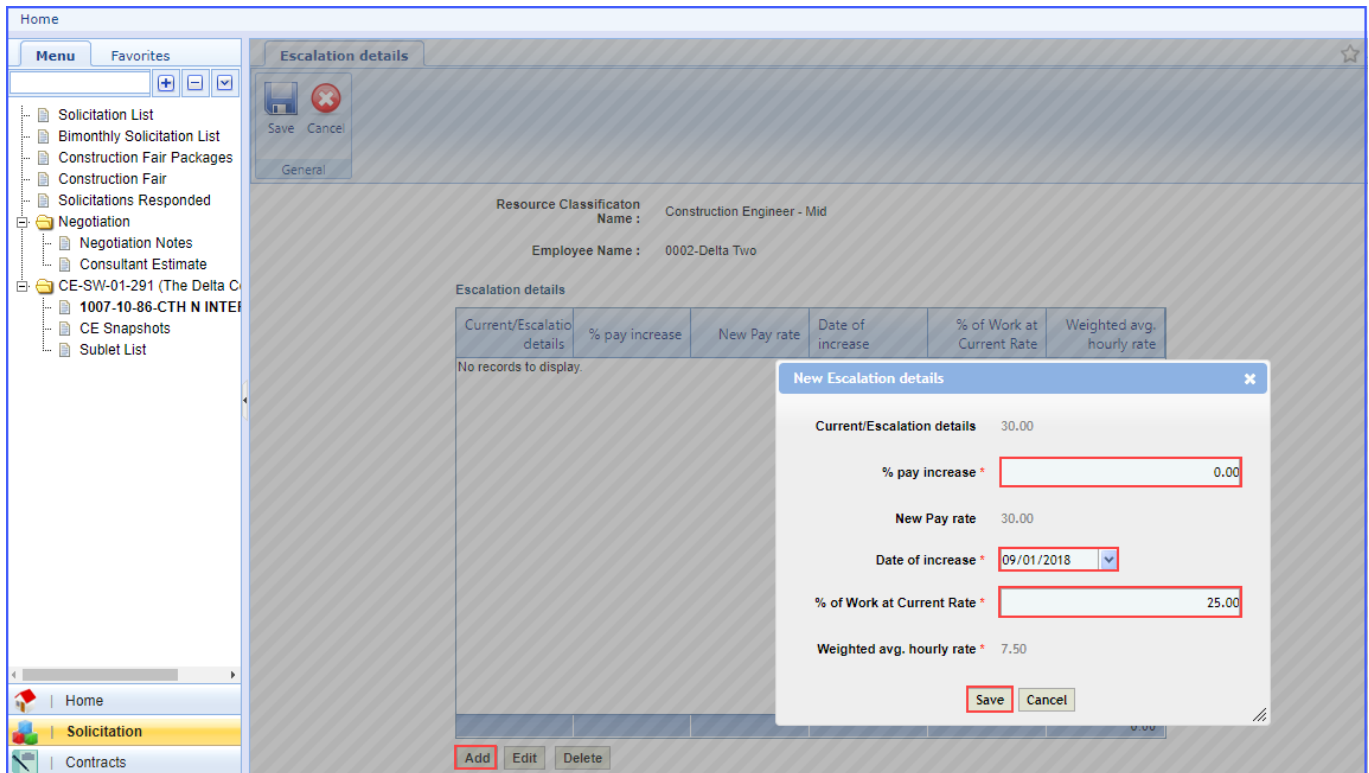


Click on the **Escalation details** tab, check box next to the employee and click **Edit**.



### 3.2.2 Add Individual Wage Escalation Details

First define the period the employee will be receiving the current rate of pay. Click **Add** underneath the table. Enter 0 as the **% pay increase**, today's date as the **Date of Increase** and the estimated amount of work that will be completed at this rate as the **% of Work at Current Rate**. If the employee will not be receiving escalation in the contract period enter 100 as the % of Work at Current Rate. Click **Save**.





Next, define the period the employee will be receiving the escalated rate of pay. Click **Add** underneath the table. Enter the escalation rate as the **% pay increase**, the date of increase as the **Date of Increase** and the estimated amount of work that will be completed at this rate as the **% of Work at Current Rate**. Click **Save**.

The escalation rate should not exceed the amount published on WisDOT’s Consultant Notices webpage.

The screenshot shows a software application window titled 'Escalation details'. On the left is a navigation pane with a tree view containing items like 'Solicitation List', 'Negotiation', and '1007-10-86-CTH N INTE'. The main area displays 'Resource Classification Name: Construction Engineer - Mid' and 'Employee Name: 0002-Delta Two'. Below this is a table with the following data:

Current/Escalatio details	% pay increase	New Pay rate	Date of increase	% of Work at Current Rate	Weighted avg. hourly rate
30.00	0.00	30.51			

A 'New Escalation details' dialog box is open, showing input fields for:

- Current/Escalation details: 30.00
- % pay increase: 1.70
- New Pay rate: 30.51
- Date of increase: 01/01/2019
- % of Work at Current Rate: 70.00
- Weighted avg. hourly rate: 21.36

Buttons for 'Add', 'Edit', and 'Delete' are visible at the bottom of the table area, and 'Save' and 'Cancel' are on the dialog box.

If the employee will be receiving multiple wage escalations during the contract period, define additional records as necessary. When all escalation records are complete click **Save**.

**The % of Work at Current Rate must sum to 100.**

Resource Classification Name : Construction Engineer - Mid  
Employee Name : 0002-Delta Two

Current/Escalation details	% pay increase	New Pay rate	Date of increase	% of Work at Current Rate	Weighted avg. hourly rate
30.00	0.00	30.00	09/01/2018	25.00	7.50
30.00	1.70	30.51	01/01/2019	75.00	22.88
					30.38

Buttons: Add, Edit, Delete

### 3.2.3 Add Specific Rate Escalation Details

**If specific rate rate card will be completed using market rates (no indirect cost or fixed fee,) please contact WisDOT to remove these costs.**

Click on the ellipses next to the **Indirect Cost %** field. Select the indirect cost rate type from the popup box and click **Select**. The current indirect cost rate will be added

Indirect Cost popup window showing 1 selected of total 4:

Indirect Cost Type	Percentage
Field Office	115.75
Home Office	163.59
Subcontract Handling	20.00
G & A	60.00

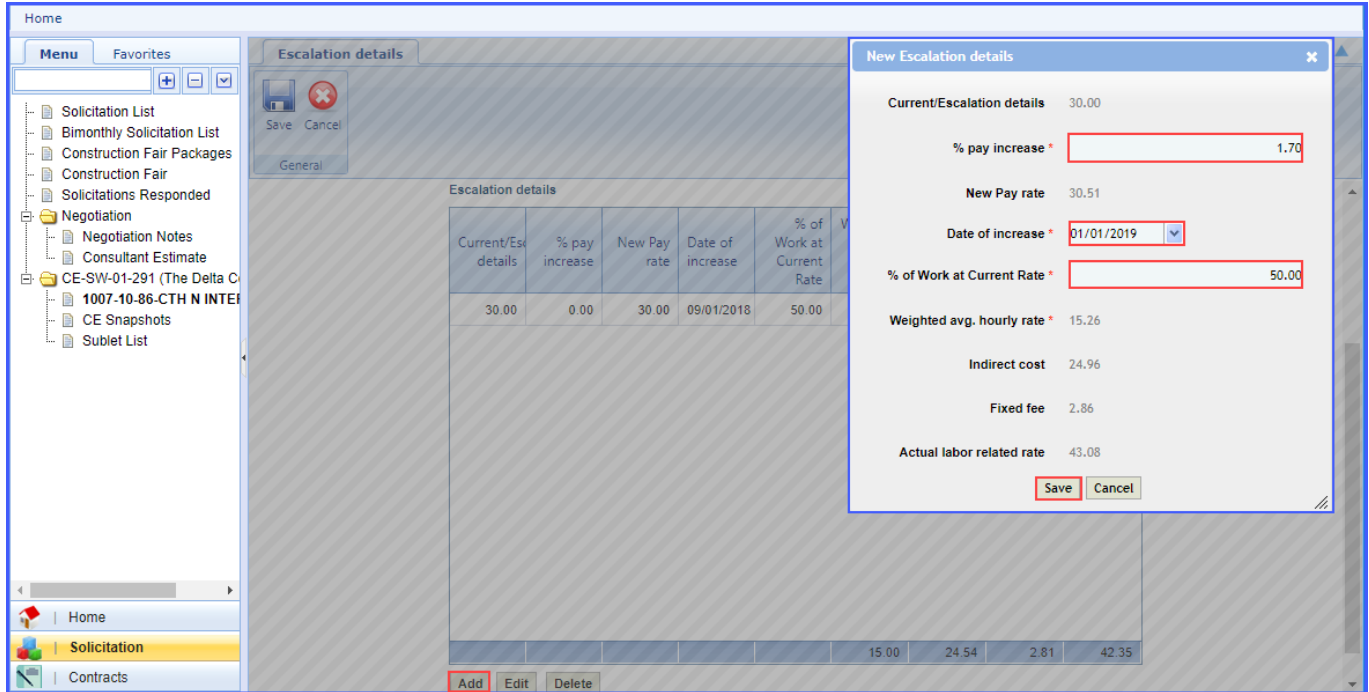
Buttons: Select, Cancel

First define the period the employee will be receiving the current rate of pay. Click **Add** underneath the table. Enter 0 as the **% pay increase**, today's date as the **Date of Increase** and the estimated amount of work that will be completed at this rate as the **% of Work at Current Rate**. If the employee will not be receiving escalation in the contract period enter 100 as the % of Work at Current Rate. Click **Save**.

The screenshot shows a software interface with a left-hand navigation pane and a main content area. The navigation pane includes a 'Home' button and a tree view with categories like 'Solicitation List', 'Negotiation', and 'Contracts'. The main content area is titled 'Escalation details' and contains a table with the following columns: 'Current/Est details', '% pay increase', 'New Pay rate', 'Date of increase', and '% of Work at Current Rate'. The table currently displays 'No records to display.' and a single row of zeros at the bottom. A dialog box titled 'New Escalation details' is open on the right, showing the following fields: 'Current/Escalation details' (30.00), '% pay increase \*' (0.00), 'New Pay rate' (30.00), 'Date of increase \*' (09/01/2018), '% of Work at Current Rate \*' (50.00), 'Weighted avg. hourly rate \*' (15.00), 'Indirect cost' (24.54), 'Fixed fee' (2.81), and 'Actual labor related rate' (42.35). The dialog box has 'Save' and 'Cancel' buttons at the bottom.

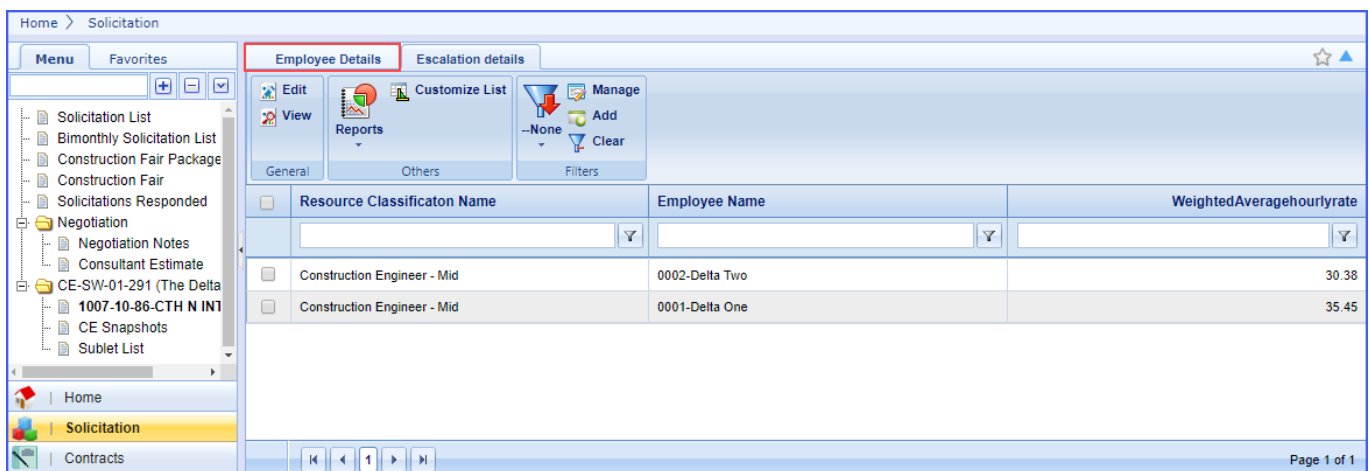
Next, define the period the employee will be receiving the escalated rate of pay. Click **Add** underneath the table. Enter the escalation rate as the **% pay increase**, the date of increase as the **Date of Increase** and the estimated amount of work that will be completed at this rate as the **% of Work at Current Rate**. Click **Save**.

The escalation rate should not exceed the amount published on WisDOT’s Consultant Notices webpage.



### 3.2.4 Weight Employee Contributions

When the escalation has been completed for all employees click **Employee Details**.



The escalated wages are brought back to the Employee Details page and the contribution of each employee to the contract must be defined. Select the first details and click on **Edit**. In the pop up box enter the employee’s estimated contribution to the contract within this classification in the **% contribution to project** and click **Save**.

The screenshot shows the 'Employee Details' window with an 'Edit' dialog box open. The dialog box contains the following information:

- Resource Name: 0002-Delta Two
- Weighted Average hourly rate: 30.38
- % contribution on project: 40.00
- Blended rate for the resource classification: 12.15

The background table shows the following data:

Resource Name	Weighted Average hourly rate	% contribution on project	Blended rate for the resource classification
0002-Delta Two	30.38	0.00	0.00
0001-Delta One	35.45	0.00	0.00
			0.00

Complete the weighting for the remaining employee(s).

The % contribution to project must sum to 100.

The screenshot shows the 'Employee Details' window with the 'Save' button highlighted. The background table shows the following data:

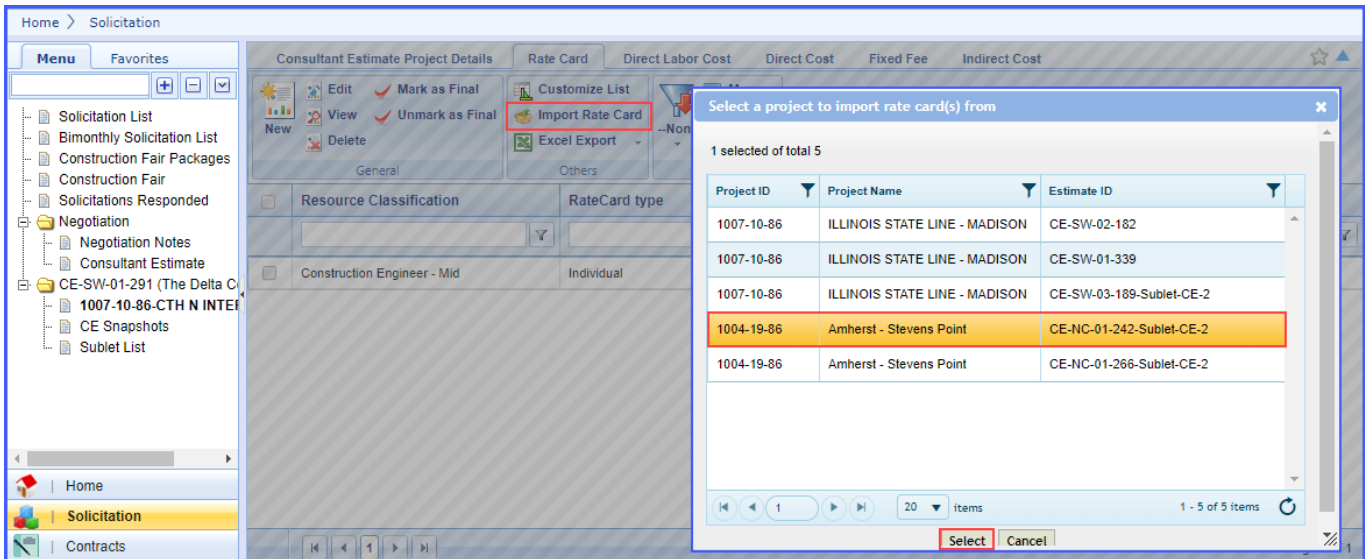
Resource Name	Current Rate
0001-Delta One	35.00
0002-Delta Two	30.00

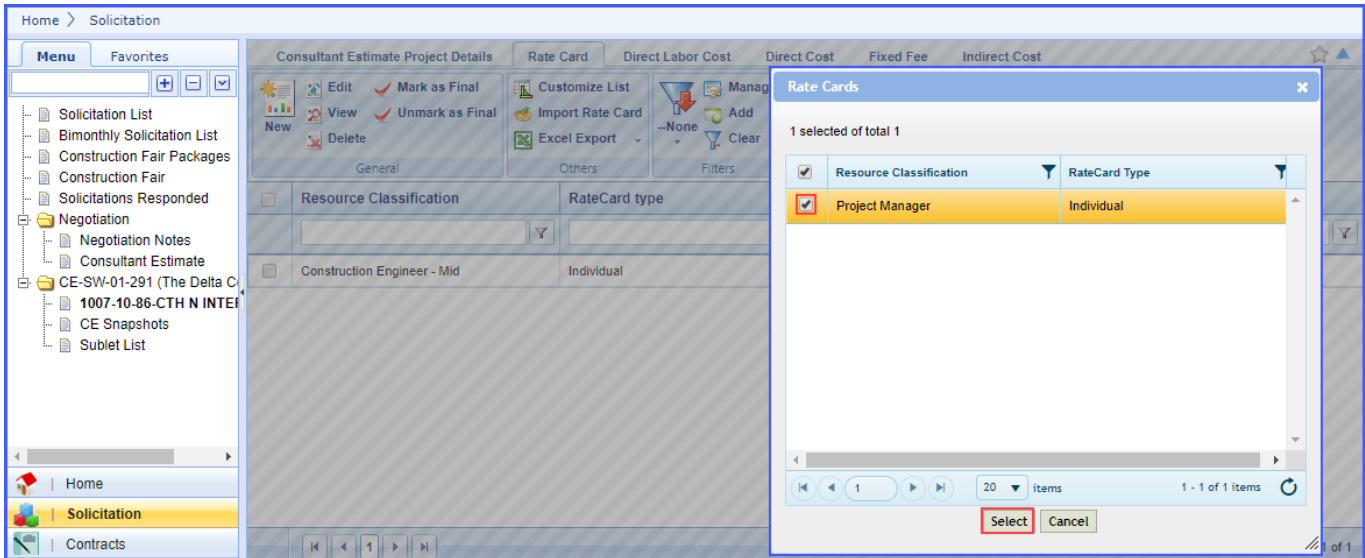
Resource Name	Weighted Average hourly rate	% contribution on project	Blended rate for the resource classification
0002-Delta Two	30.38	40.00	12.15
0001-Delta One	35.45	60.00	21.27
			33.42

### 3.2.5 Import a Rate Card

A rate card may also be imported from a previous negotiation. To import a rated card click Import Rate Card. In the pop up box select a negotiation and click **Select**.

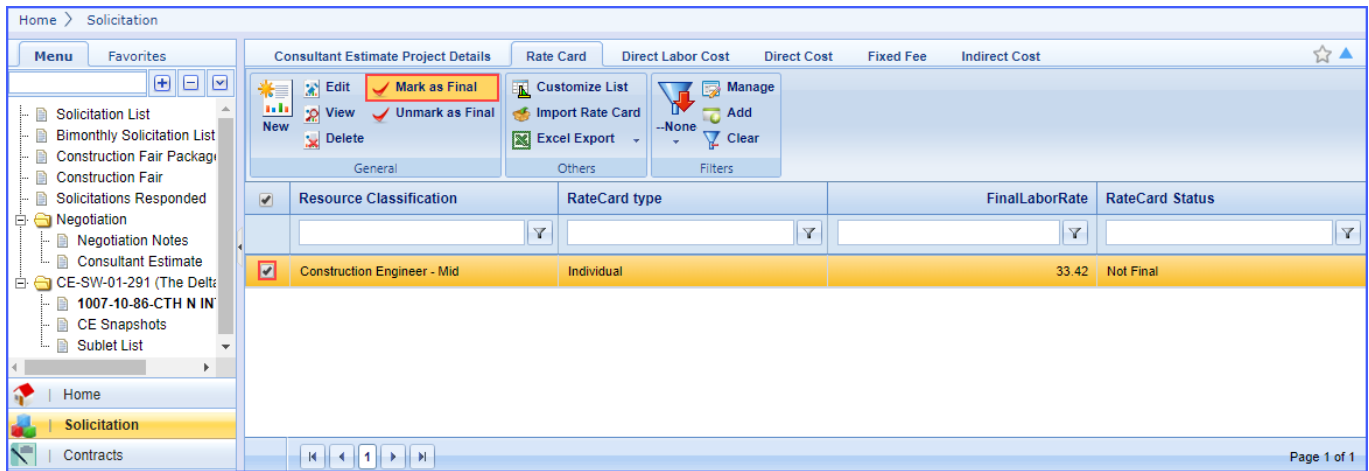


In the next pop up box that appears check the box next to the rate card to be imported and click Select.

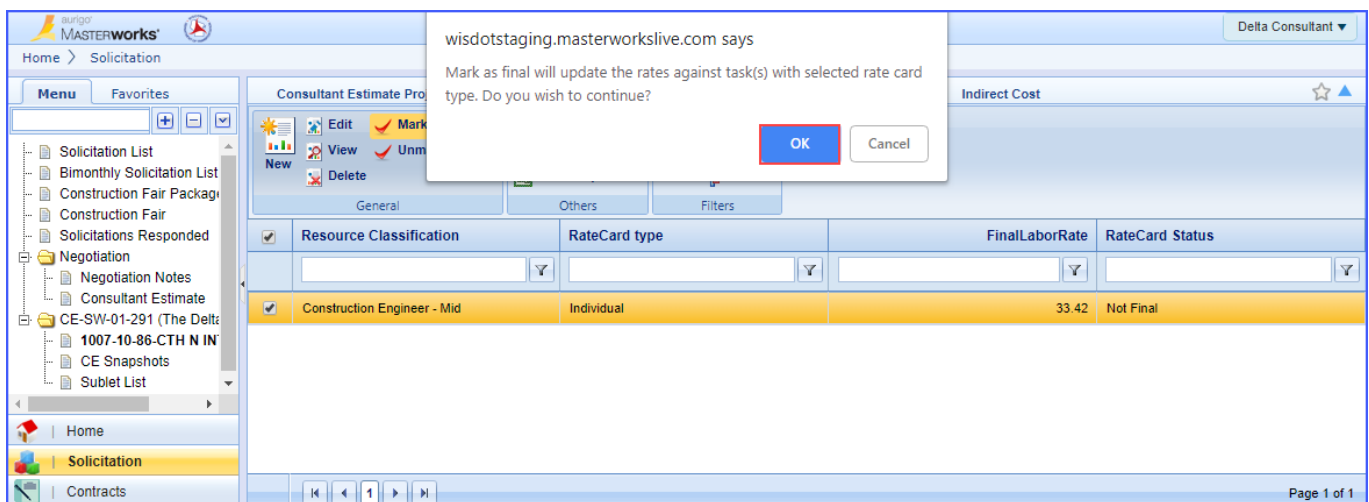


### 3.2.6 Complete the Rate Card

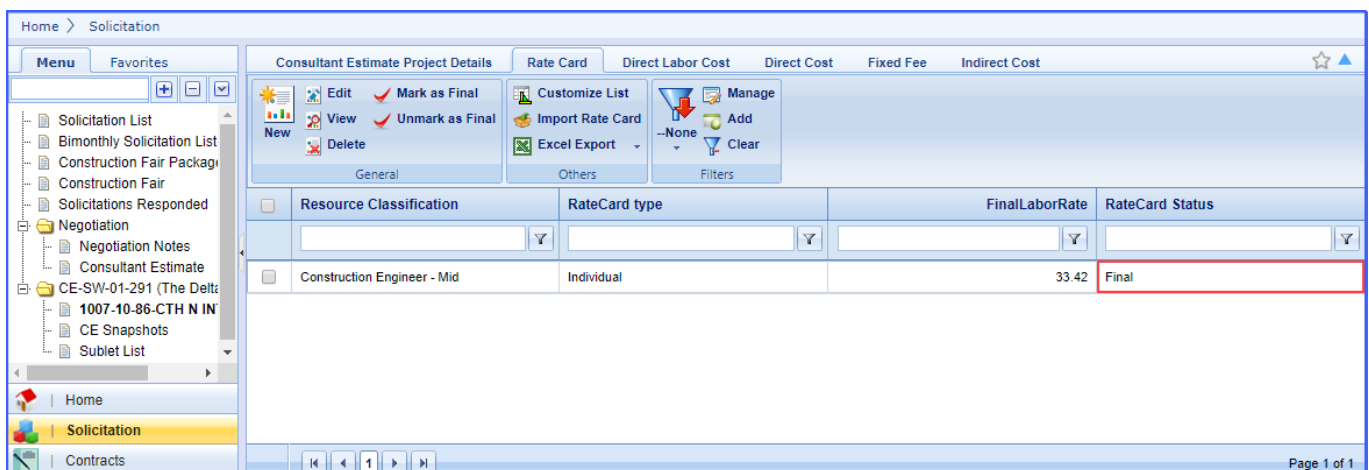
Mark the rate card final by selecting it using the checkbox and clicking **Mark as Final**.



Click **OK** on the warning message that appears.



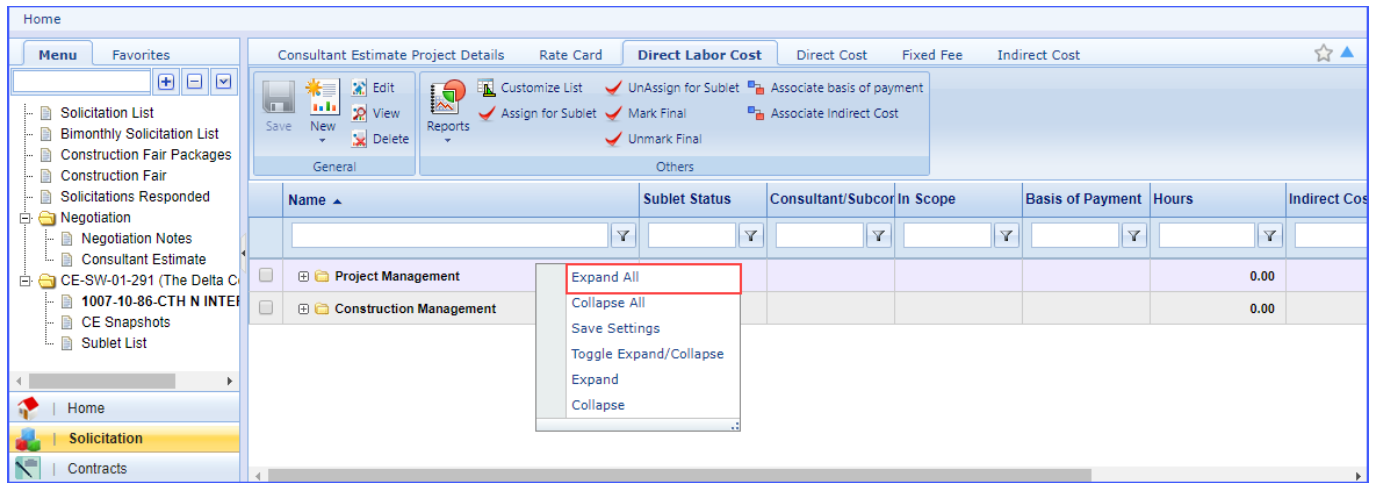
The RateCard Status should now show Final.



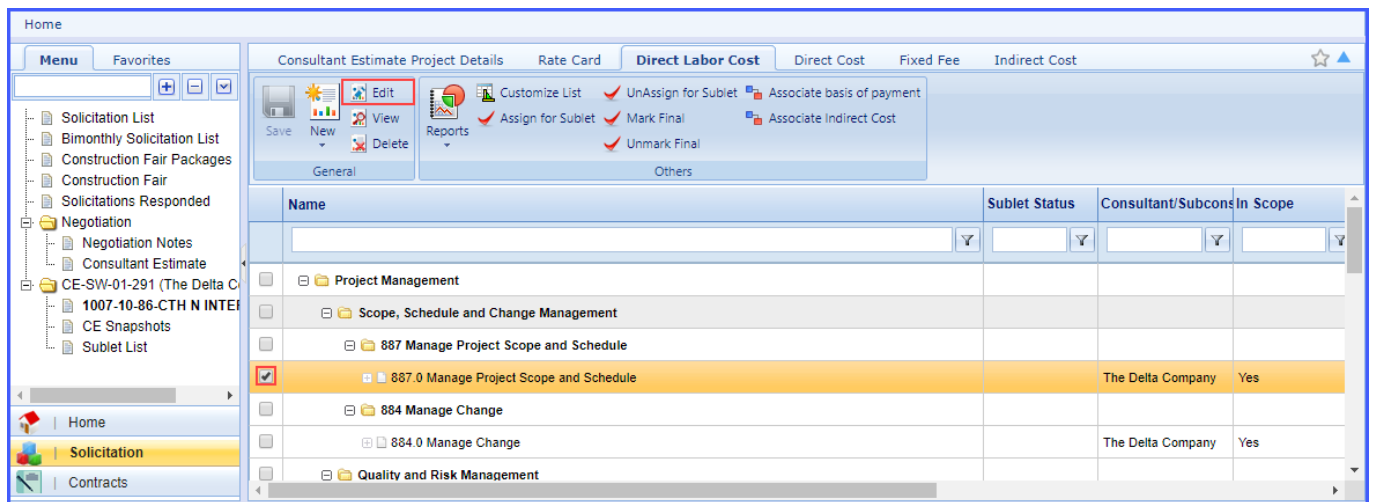
### 3.3 Direct Labor Cost

#### 3.3.1 Entering Direct Labor

Click on the **Direct Labor Cost** tab. Right click on the folders that appear and click **Expand All**.



Check the box next to the first task and click **Edit**.





A description of the task will be displayed. Select **Yes** or **No** from the dropdown for field If Authorized. Select the Basis of Payment from the dropdown menu. Notes may be added to include any assumptions made.

**In most cases the field for If Authorized should be set to No. This indicates that the task will be part of the initial contract authorization.**

The screenshot shows the 'Edit Task' window with the following details:

- Activity:** Project Management/Scope, Schedule ar
- Task:** 887.0 Manage Project Scope and Sched [Clear](#)
- Description:** Includes processes for establishing the policies, procedures, and documentation needed to plan, develop, manage, execute, and
- Unit:** HRS
- In Scope:** Yes
- If Authorized:** No
- Unit Price in \$:** 0.00
- Amount in \$:** 0.00
- Basis of payment:** Actual Plus Fixed Fee
- Rate card type:** Individual Wage
- Notes:** (Empty text area)
- Complete:**

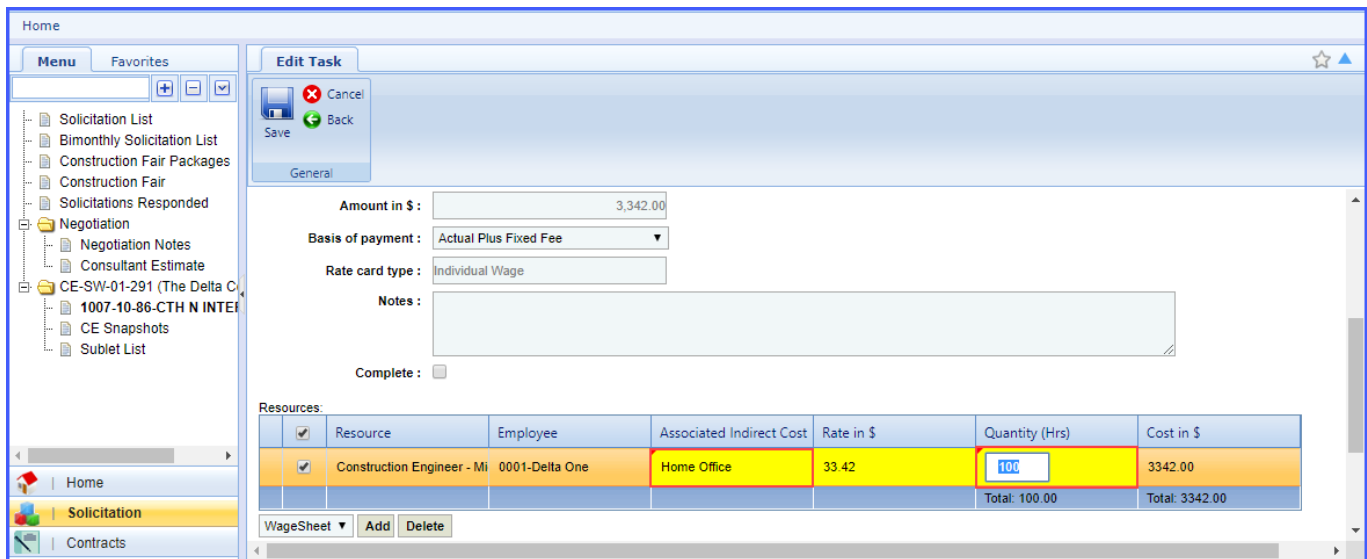
Click on the **Add** button beneath the Resources table. Check the box next to the resource(s) that will be working on the task and click **Select**.

The screenshot shows the 'Edit Task' window with the 'Resource' dialog box open. The dialog displays the following table:

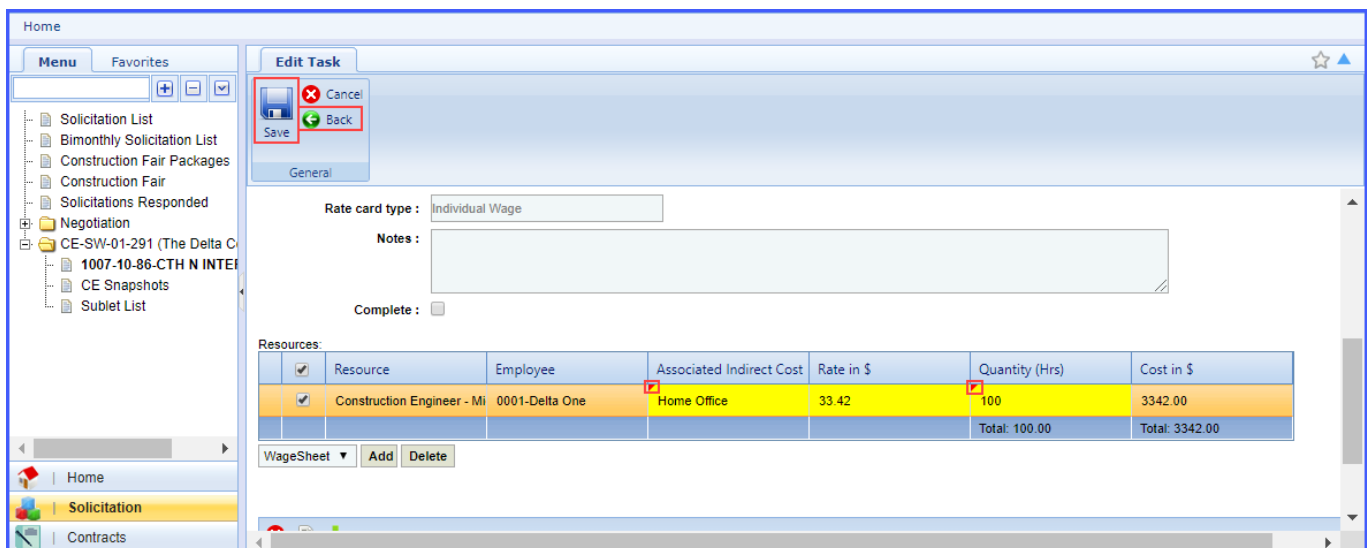
Resource	Employee
<input checked="" type="checkbox"/> Construction Engineer - Mid	0001-Delta One
<input type="checkbox"/> Construction Engineer - Mid	0002-Delta Two

The 'Add' button in the Resources table is highlighted. The 'Select' button in the dialog is also highlighted.

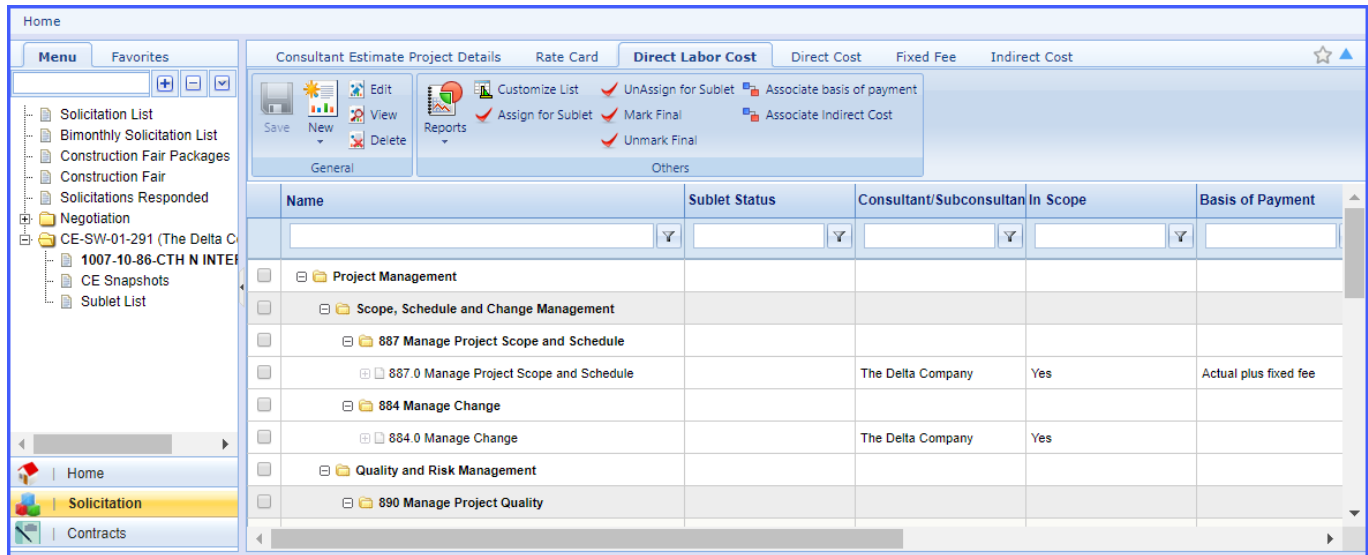
Double click in the cell in the **Associated Indirect Cost** column and select an indirect cost rate type from the dropdown. Double click in the cell in the **Quantity (Hrs)** column and enter the estimated number of hour this resource will take to complete the task.



Click outside of the yellow cell so that red triangles appear in the upper left corners. Click **Save** and then click **Back** to return to the task list.



Complete the rest of the task in the task list as above.

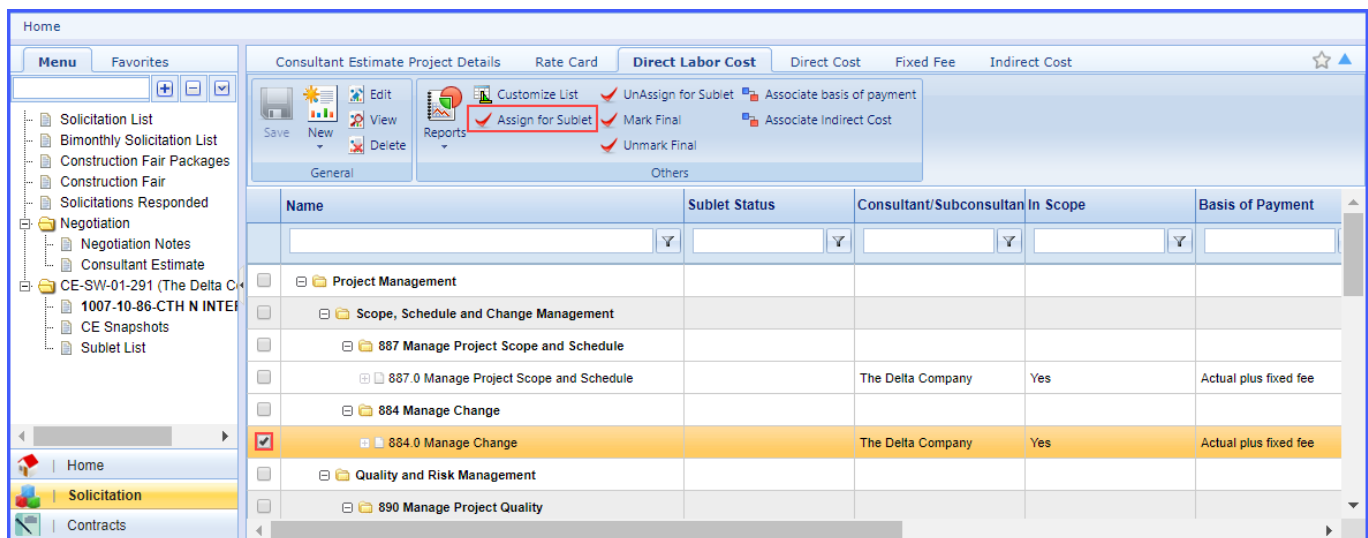


Additional tasks may be added to the task list as outlined in section [Add a New Task](#) in this guide. Please discuss with your WisDOT contact before adding additional tasks.

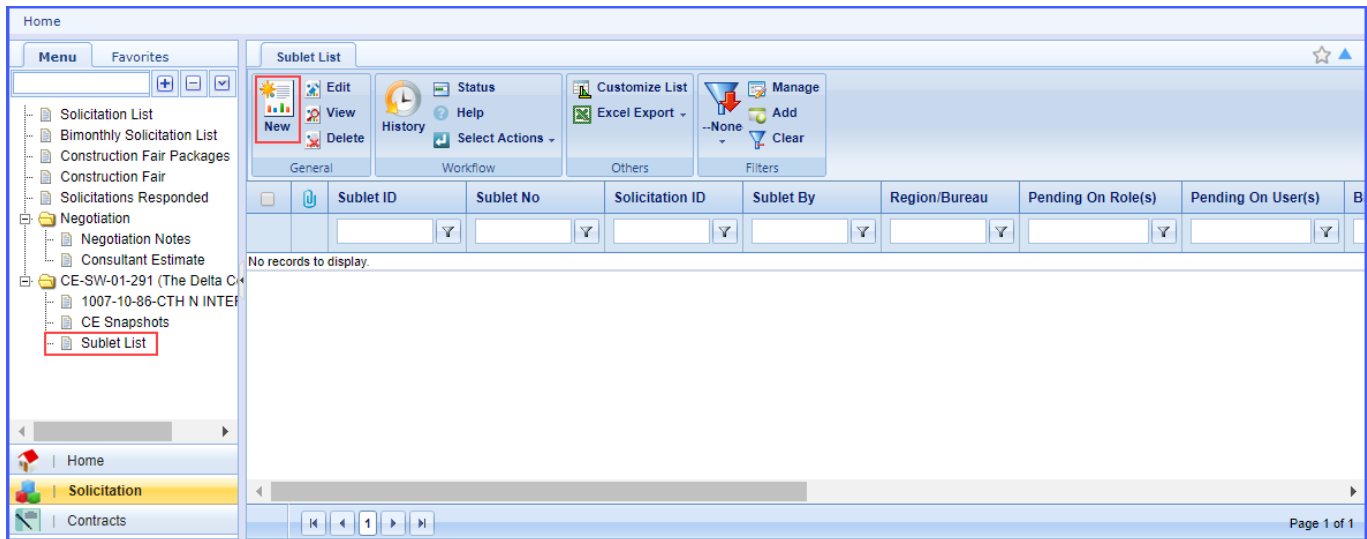
### 3.3.2 Creating a Sublet

A single task may not be performed by more than one consultant. If a task will be performed by more than one consultant add the same task to the task list twice. See [Add a New Task](#) in this guide.

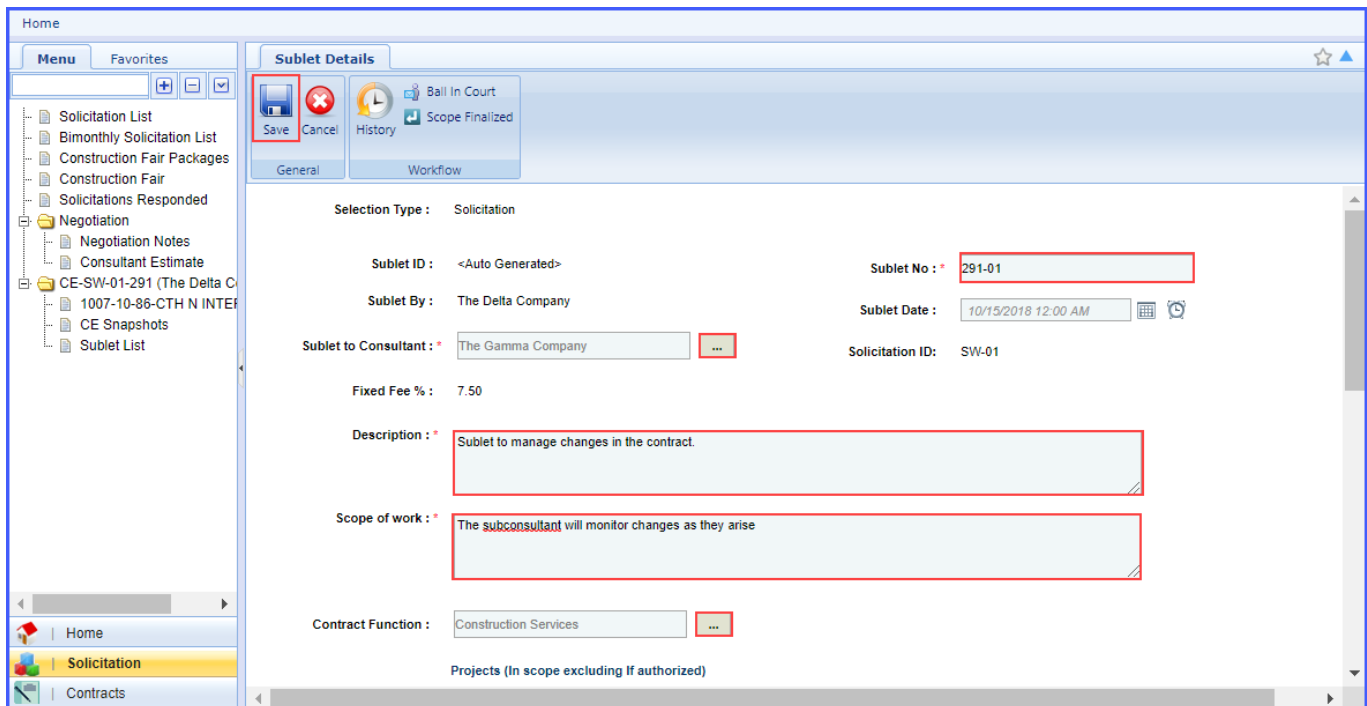
To create a sublet check the box next to the task to be given to the subconsultant and click **Assign for Sublet**.



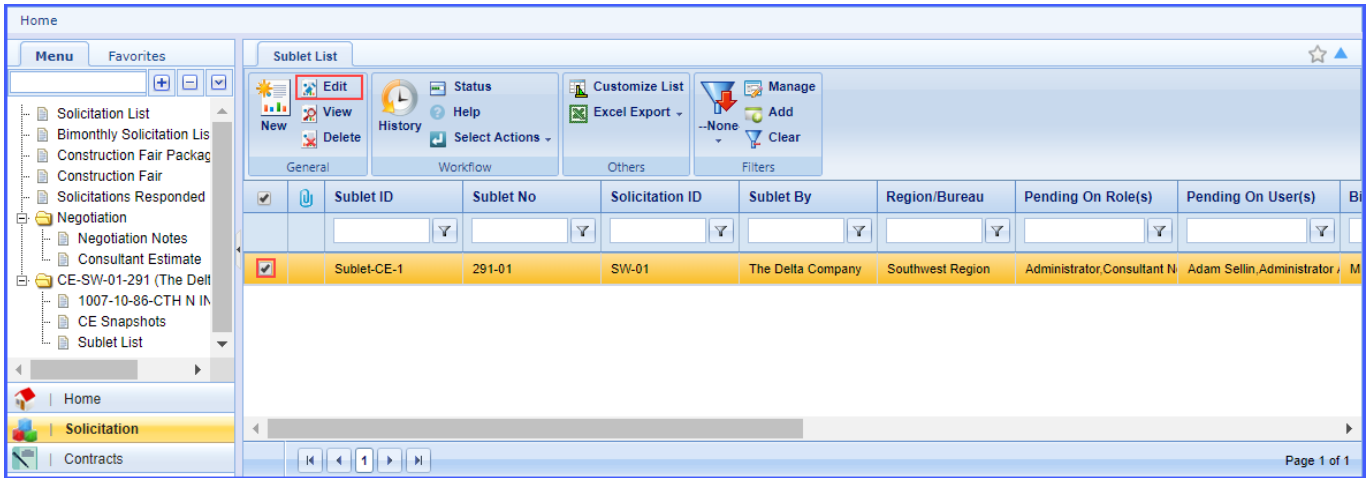
Click on Sublet List in the left navigation pane and click on **New**.



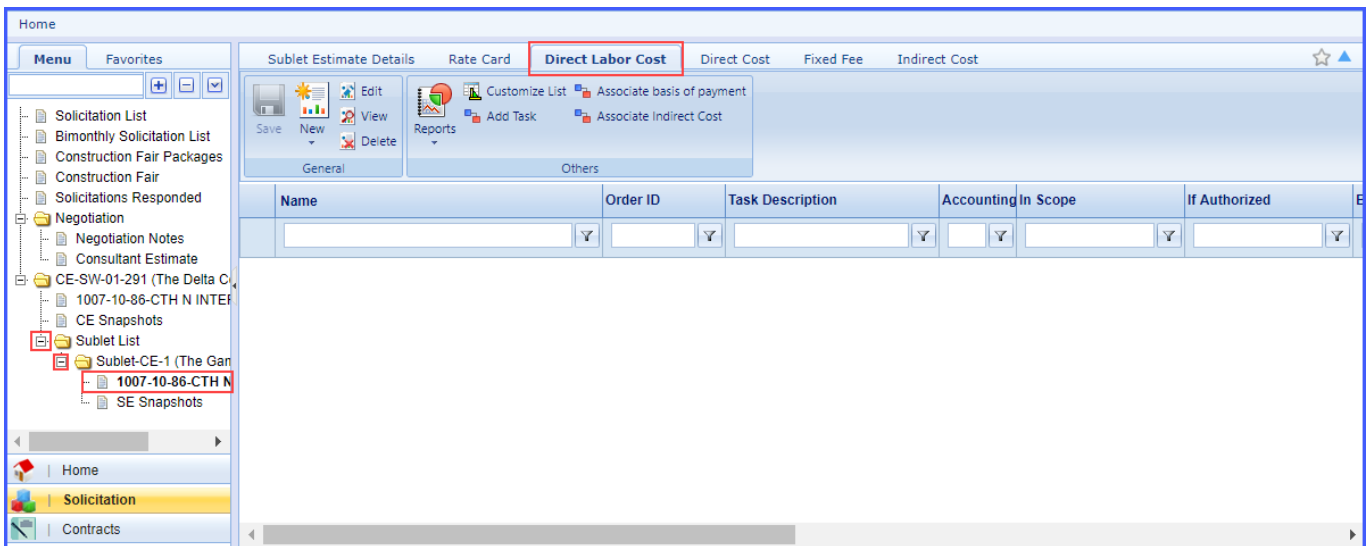
Enter the **Sublet No** as the negation number with a dash and sequence number (ex 291-01.) Use the ellipses to select **Sublet to Consultant**. Enter **Description** and **Scope of Work** narratives. Use the ellipses to select the **Contract Function** of the sublet. Click **Save**.



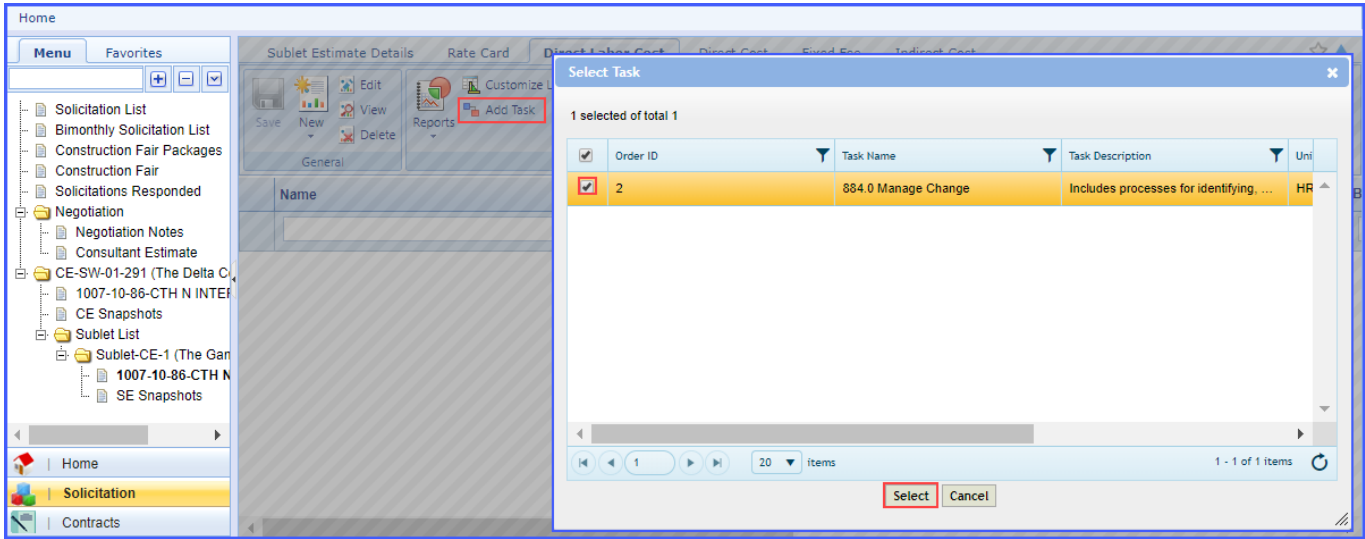
Check the box next to the newly created sublet and click **Edit**.



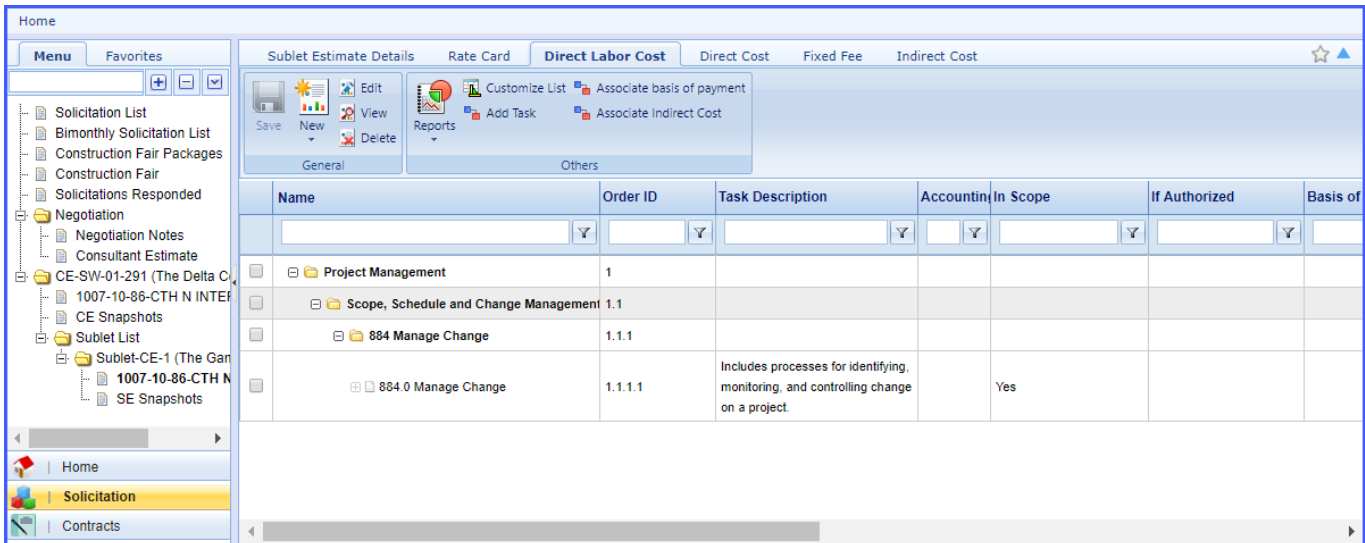
Expand the folder in the left navigation pane and click on the link with the project ID. Click on the **Direct Labor Cost** tab.



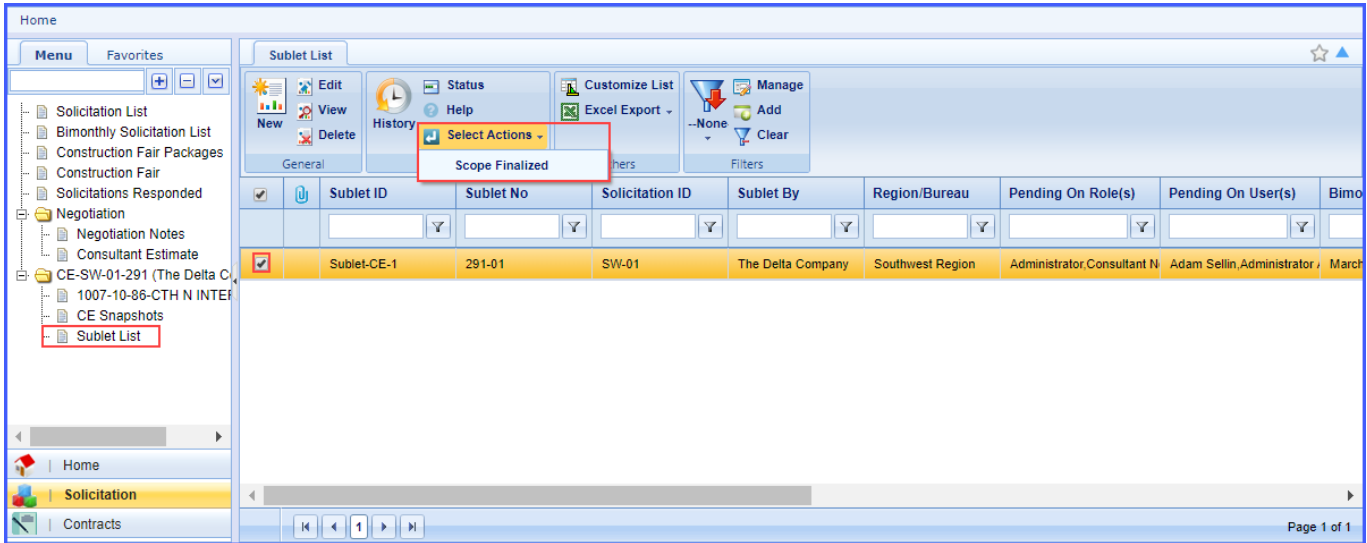
Click **Add Task**. In the pop up box check the box next to the task to be assigned to the subconsultant and click **Select**.



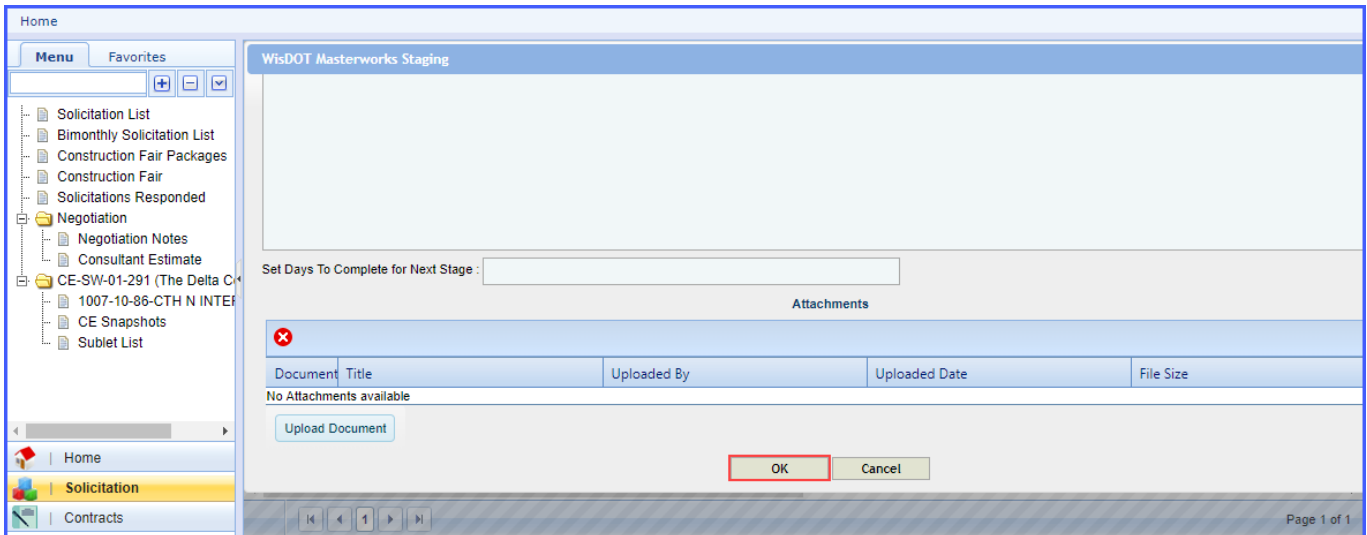
The task will now show up in the subconsultant's task list.



Click on **Sublet List** in the left navigation pane. Check the box next to the sublet. Click on **Select Actions** and **Scope Finalized**.



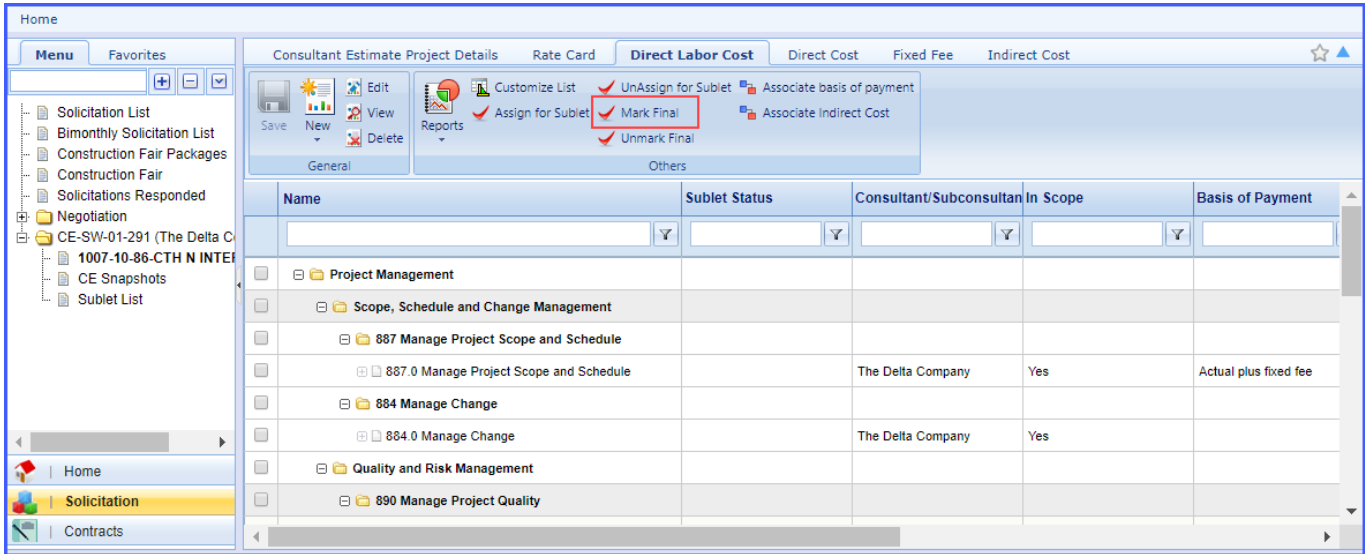
Click **OK** on the acknowledgement screen. The subconsultant can now begin work on its negotiation.



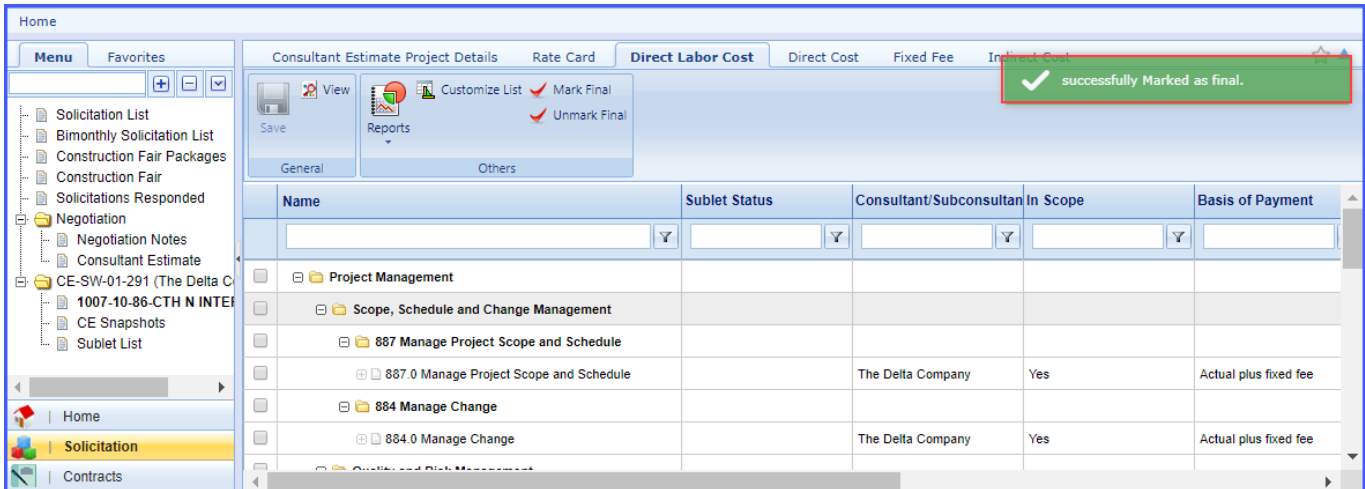
### 3.3.3 Completing Direct Labor Cost

Once all tasks have been completed click **Mark Final**.

**A basis of payment must be associated to every task to complete this action.**



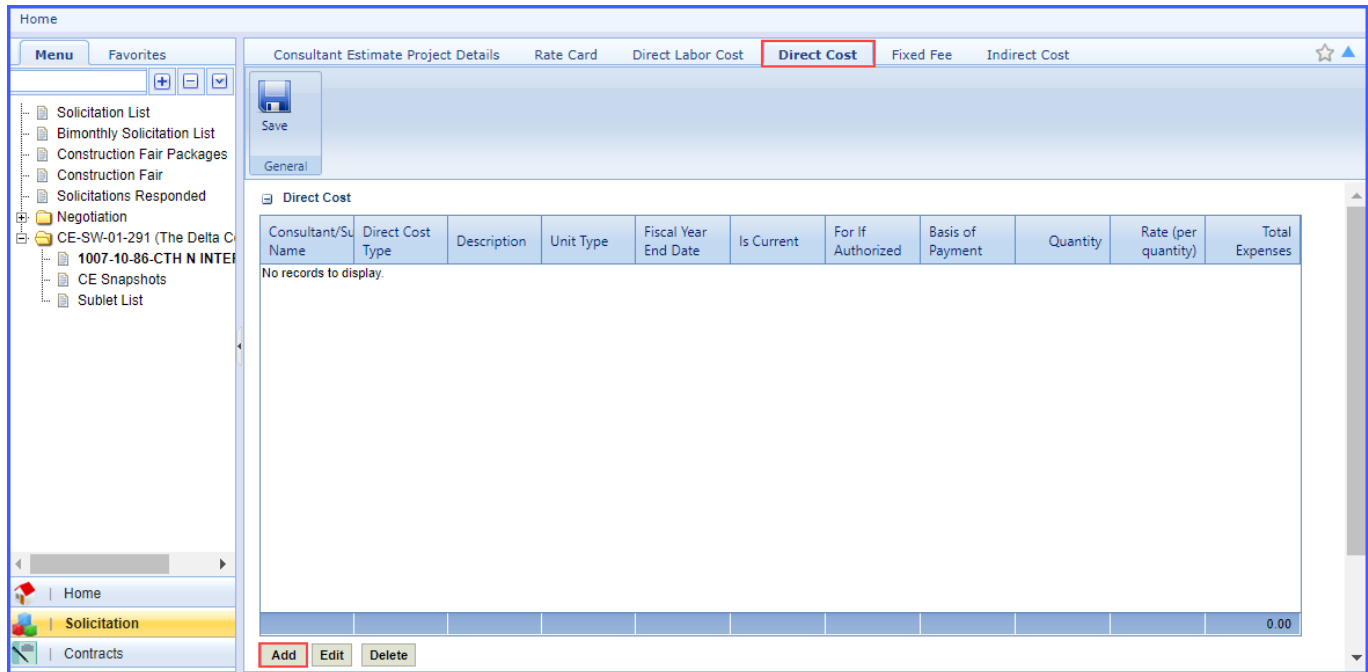
A success message will appear.



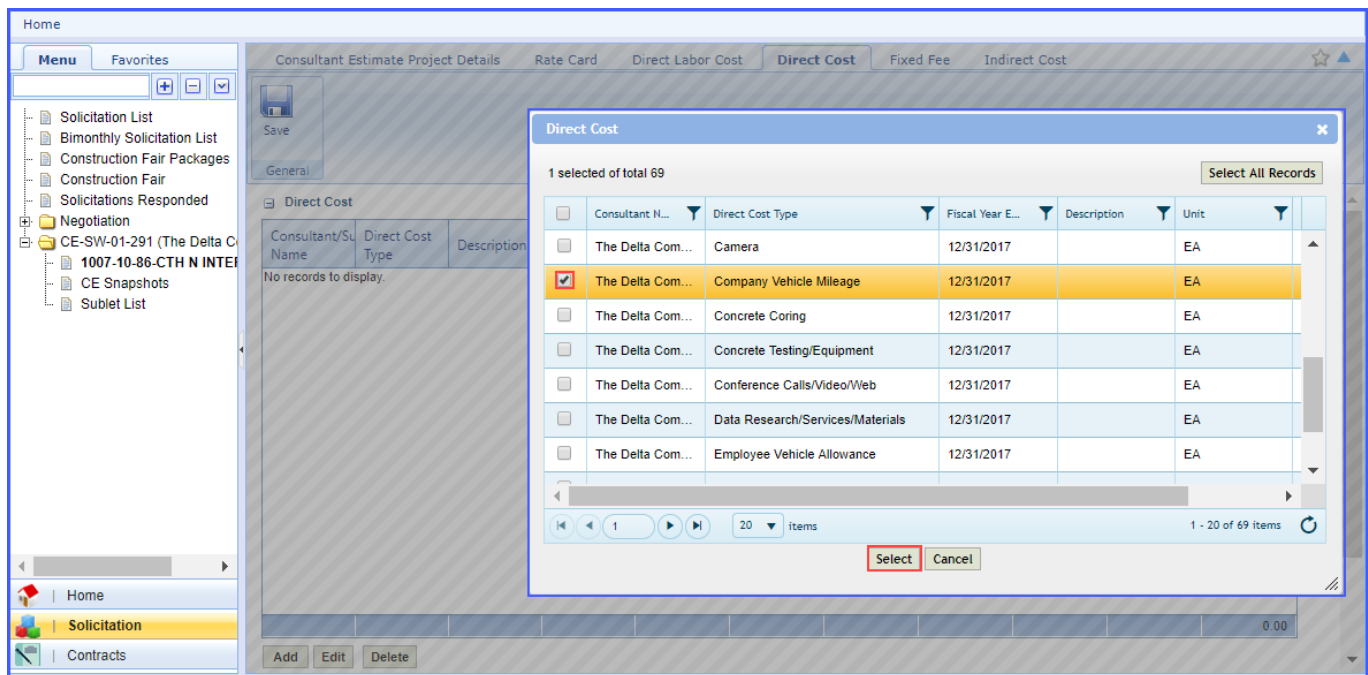


### 3.4 Add Direct Costs

To add direct costs, click on the **Direct Cost** tab and click **Add** below the Direct Cost table.



In the pop up box check the box(es) next to direct cost type(s) that will be part of the contract. Click **Select** to add the types to the table. Multiple types may be added at once. Direct cost types may be duplicated, for example meals for lunch and meals for dinner.



Click on one of the direct types so that it turns orange and click **Edit**.

The screenshot shows the 'Direct Cost' section of the software. A table lists direct costs with columns for Consultant/Su Name, Direct Cost Type, Description, Unit Type, Fiscal Year End Date, Is Current, For If Authorized, Basis of Payment, Quantity, Rate (per quantity), and Total Expenses. The row for 'Meals' is highlighted in orange. Below the table, the 'Edit' button is highlighted in red.

Consultant/Su Name	Direct Cost Type	Description	Unit Type	Fiscal Year End Date	Is Current	For If Authorized	Basis of Payment	Quantity	Rate (per quantity)	Total Expenses
The Delta Com	Company Vehi	Miles to and from site	EA	12/31/2017	Yes	No	Actual Plus Fix	3,500.00	0.545	1907.50
The Delta Com	Meals		EA	12/31/2017	Yes	No		0.00	0	0.00
The Delta Com	Meals		EA	12/31/2017	Yes	No		0.00	0	0.00
										1,907.50

Enter an additional **Description**. **For If Authorized** defaults to No, this should not be changed unless it will be part of a future contract authorization. Select a **Basis of Payment**. Enter the estimated **Quantity** of the item and the **Rate (per quantity)**. Click **Save**.

**The basis of payment for direct costs should match the basis of payment for direct labor cost.**

The screenshot shows the 'Edit Direct Cost' dialog box. The dialog box contains the following fields: Description (Meals for lunch), Unit Type (EA), Fiscal Year End Date (12/31/2017), Is Current (Yes), For If Authorized (No), Basis of Payment (Actual Plus Fixed Fee), Quantity (175.00), and Rate (per quantity) (10.00). The Total Expenses are calculated as 1,750.00. The 'Save' button is highlighted in red.

After all items have been completed click **Save**.

Save

Consultant/SU Name	Direct Cost Type	Description	Unit Type	Fiscal Year End Date	Is Current	For If Authorized	Basis of Payment	Quantity	Rate (per quantity)	Total Expenses
The Delta Com	Company Vehi	Miles to and from site	EA	12/31/2017	Yes	No	Actual Plus Fix	3,500.00	0.545	1907.50
The Delta Com	Meals	Meals for lunch	EA	12/31/2017	Yes	No	Actual Plus Fix	175.00	10.00	1,750.00
The Delta Com	Meals	Dinner	EA	12/31/2017	Yes	No	Actual Plus Fix	50.00	20.00	1,000.00
										4,657.50

In Scope excluding if authorized: 4,657.50

### 3.5 Fixed Fee

Click on the Fixed Fee tab to review the amount of fixed fee included in the contract. There is no user entry on this screen.

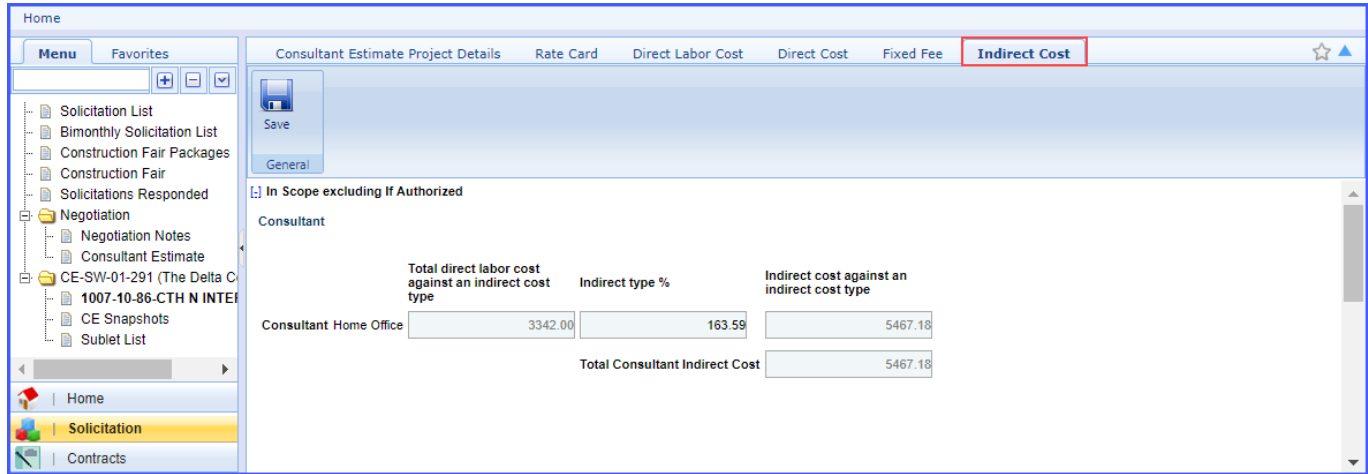
Fixed Fee

**The Delta Company**

	Total direct labor cost (A)	Fixed Fee % (B)	(A * B)	Multiplication factor	Total
'In Scope' excluding 'If Authorized'	3342.00	7.50	250.65	3.00	751.95
<b>Total Fixed Fee</b>					<b>751.95</b>

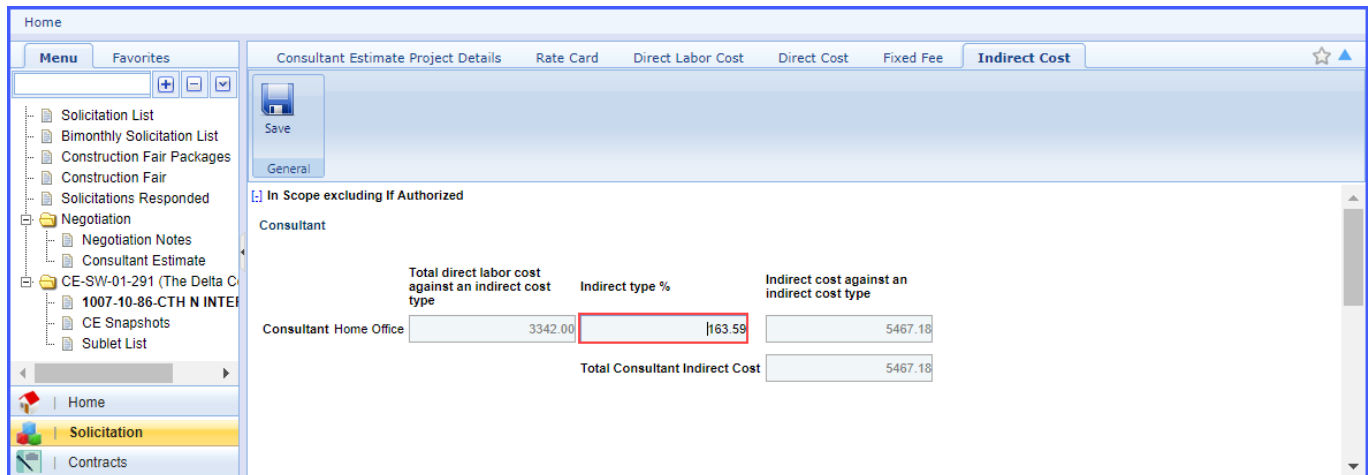
### 3.6 Indirect Cost

Click on the **Indirect Cost** tab to review the indirect cost added to the contract.



The **Indirect type %** field may be edited as part of negotiations.

**At this time, the indirect cost rate may only be edited down. If the consultant is expecting an increase in an indirect cost rate please contact WisDOT prior to beginning negotiations.**

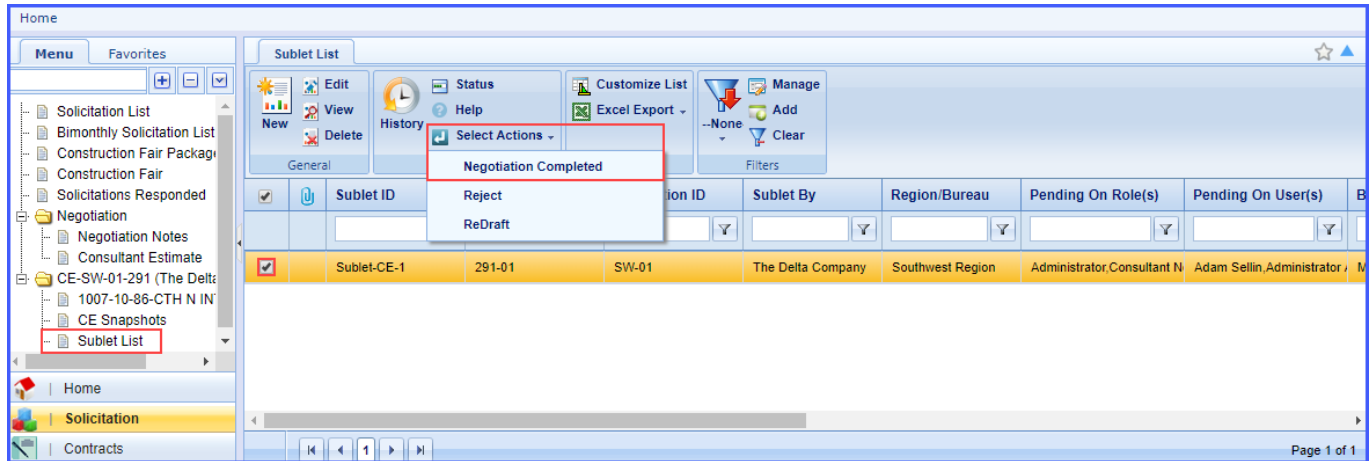


### 3.7 Publishing the Estimate

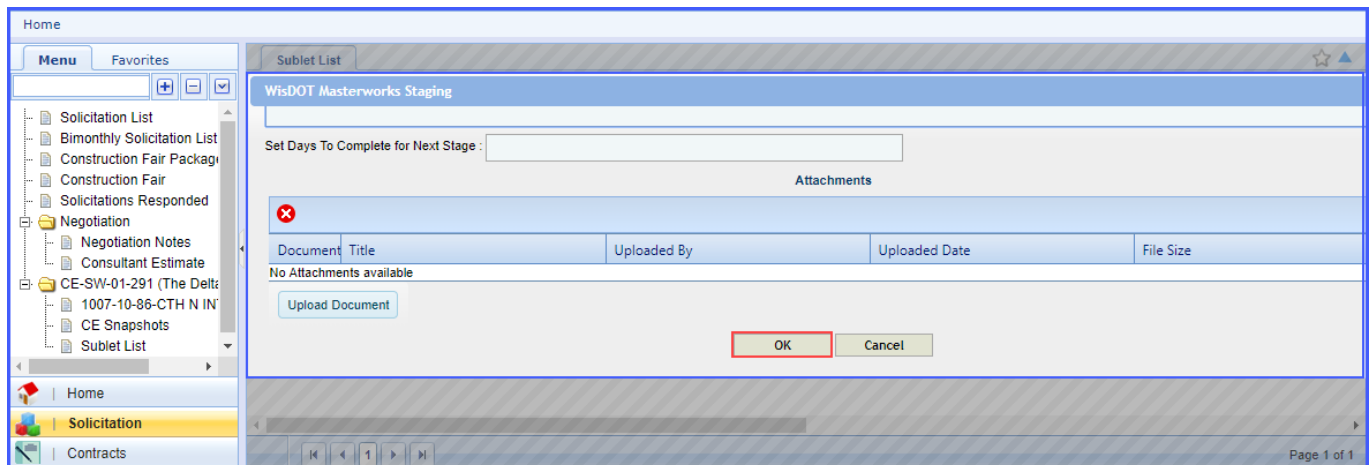
#### 3.7.1 Accepting Subconsultant Negotiations

If any sublets have been made, the higher tier consultant must accept before the negotiation may be published back to WisDOT.

Click on **Sublet List** in the left navigation pane. Check the box next to the negotiation. Click on **Select Actions** and **Negotiation Completed** to accept the subconsultants estimate. If revisions are needed choose **ReDraft** and then click on **Select Actions** and **Scope Finalized**.

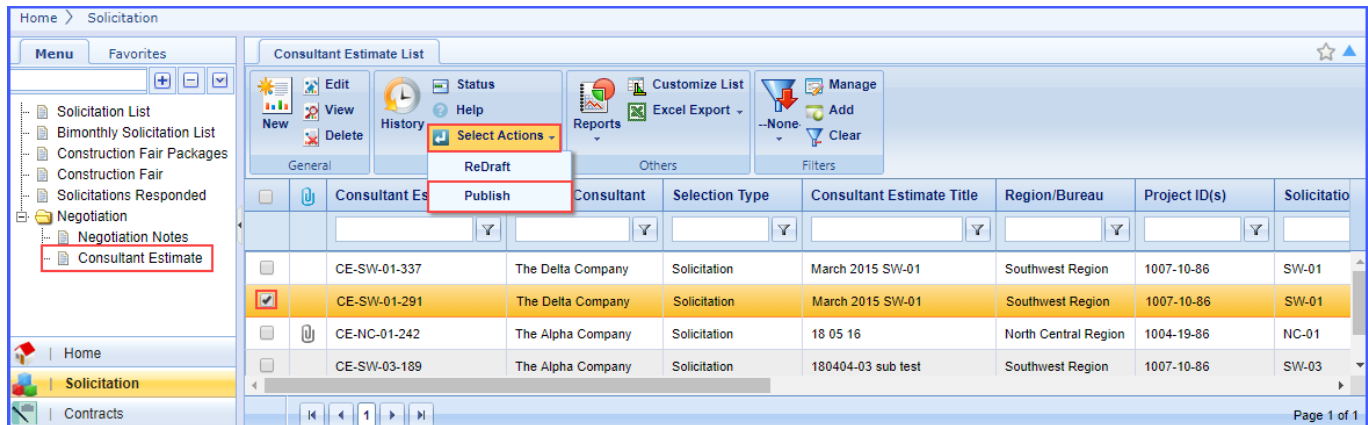


Click **OK** on acknowledgement screen.

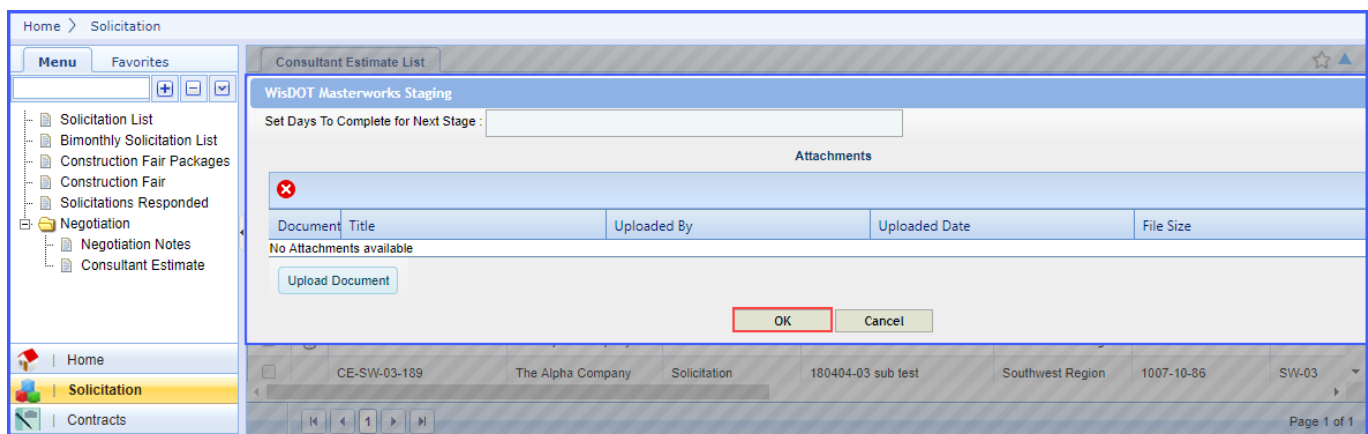


### 3.7.2 Publishing the Prime's Estimate

After reviewing project costs click on **Consultant Estimate** in the left navigation pane. Check the box next to the negotiation. Click **Select Actions** and then click **Publish**. This returns the negotiation to WisDOT and moves the process forward. Selecting ReDraft will return the negotiation to WisDOT for revisions.

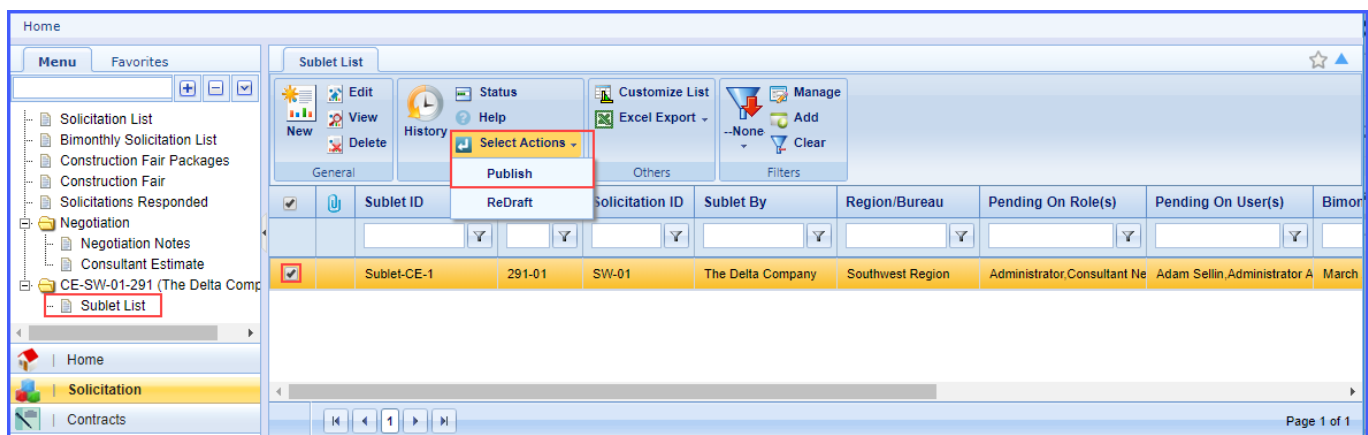


Click **OK** on the acknowledgement screen.

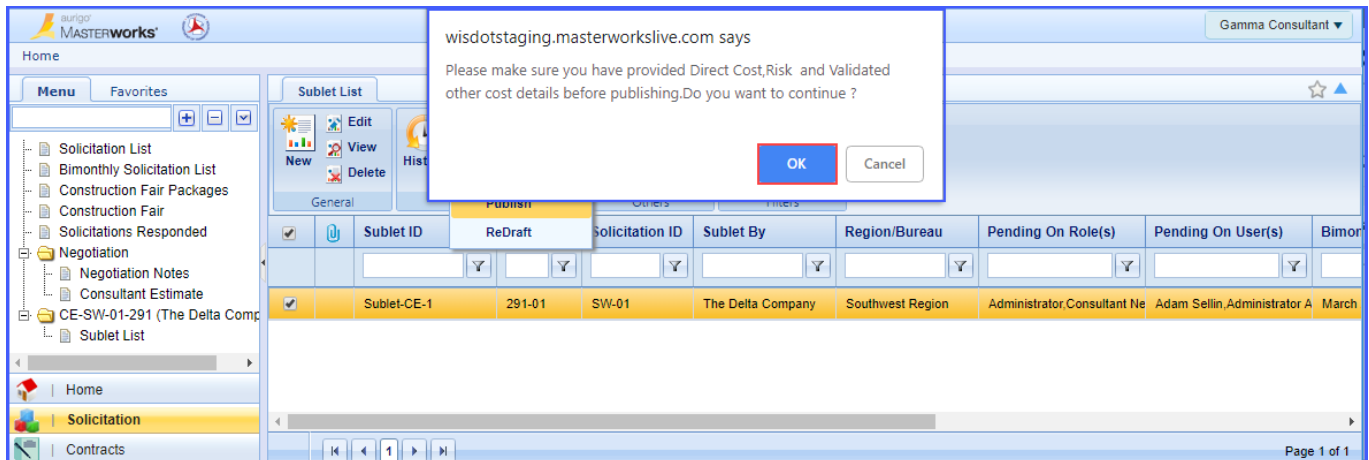


### 3.7.3 Publishing a Sublet

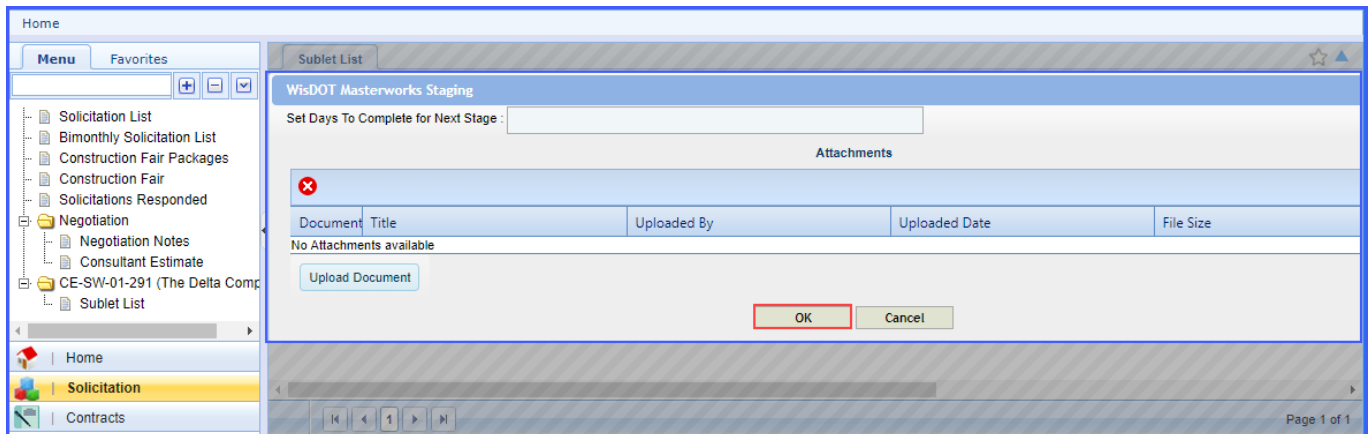
After reviewing project costs click on the **Sublet List** link in the left navigation pane. Check the box next to the negotiation. Click **Select Actions** and then click **Publish**.



Click **OK** on the warning message that appears



Click **OK** on the acknowledgement screen.



The negotiation has now been returned to WisDOT. Please let your WisDOT contact know the estimate is ready for review.

## 4 Review Estimate – WisDOT

After the consultant has published the estimate, WisDOT may begin its review.

### 4.1 Negotiation Reports

To view reports, navigate to the solicitation module. Click on Consultant Estimate. Check the box next to the negotiation. Click on the Reports button and select one of the reports from the menu.

The screenshot shows the 'Consultant Estimate List' interface. The left navigation pane has 'Solicitation' selected. The main table lists several estimates, with 'CE-SW-01-291' selected. The 'Reports' button is highlighted, and a dropdown menu is open, showing options like 'Full Negotiation Report', 'Details Report', 'List Page Report', 'Consultant Estimate Summary', and 'Project Consultant Estimate Summary'.

Consultant Estimate ID	Selected Consultant	Selection Type	Consultant Estimate Title	Region/Bureau	Project ID(s)	Solicitation
CE-LD-21-292	El Seif Engineering Co LT	Local Design	Muz_CE_LD_001	Bureau of Structures	proj-12-11	LD-21
<input checked="" type="checkbox"/> CE-SW-01-291	The Delta Company	Solicitation	March 2015 SW-01	Southwest Region	1007-10-86	SW-01
CE-WOR-167-290	The Alpha Company	Work Order Request	Test for DT25	Bureau of Project Deve	1517-07-13	WOR-167
CE-NE-01-289	El Seif Engineering Co LT	Solicitation	Test_CE_Khan	Northeast Region	proj-12-11	NE-01

- The Full Negotiation Report contains all negotiation information.
- The Details Report contains a summary of prime consultant costs.
- The List Page Report lists all negotiations displayed on the screen.
- The Consultant Estimate Summary contains a summary of costs by type and task.
- The Project Consultant Estimate Summary contains a summary of direct labor cost by task.

### 4.2 Reviewing Estimate Costs

Navigate to the **Solicitation** module, expand the **Negotiation** folder in the left navigation and clicking **Consultant Estimate**. Check the box next to the negotiation and click **View**.

The screenshot shows the 'Consultant Estimate List' interface. The left navigation pane has 'Solicitation' selected. The main table lists several estimates, with 'CE-SW-01-291' selected. The 'View' button is highlighted in the toolbar.

Consultant Estimate ID	Selected Consultant	Selection Type	Consultant Estimate Title	Region/Bureau	Project ID(s)	Solicitation
CE-BPD-01-293	The Alpha Company	Solicitation	Consultant contract Viewer test1	Bureau of Project Deve	2645-08-90	BPD-01
CE-LD-21-292	El Seif Engineering Co LT	Local Design	Muz_CE_LD_001	Bureau of Structures	proj-12-11	LD-21
<input checked="" type="checkbox"/> CE-SW-01-291	The Delta Company	Solicitation	March 2015 SW-01	Southwest Region	1007-10-86	SW-01
CE-WOR-167-290	The Alpha Company	Work Order Request	Test for DT25	Bureau of Project Deve	1517-07-13	WOR-167
CE-NE-01-289	El Seif Engineering Co LT	Solicitation	Test_CE_Khan	Northeast Region	proj-12-11	NE-01



A summary of prime consultant costs is displayed.

The screenshot shows the 'Consultant Estimate Details' window. The left navigation pane is expanded to 'Solicitation'. The main area displays 'Selected Prime Consultant: The Delta Company' and 'Negotiation Submission Due Date: 10/01/2018'. Below this is a table titled 'Projects (In scope excluding If authorized)'. The table has columns for Project Name, Direct Labor Cost in \$, Direct Cost in \$, Indirect Cost in \$, Fixed Fee in \$, Marked as Final, Total Hours, Total in \$, and limit. One project is listed: ILLINOIS S, with a total cost of 14,218.63.

Project Name	Direct Labor Cost in \$	Direct Cost in \$	Indirect Cost in \$	Fixed Fee in \$	Marked as Final	Total Hours	Total in \$	limit
ILLINOIS S	3,342.00	4,657.50	5,467.18	751.95	Yes	100.00	14,218.63	CTH N INTE
	3,342.00	4,657.50	5,467.18	751.95		100.00	14,218.63	

To view more detailed information, expand the folder in the left navigation and click on the link with the project ID. Click through the tabs on the top of the screen to see more details.

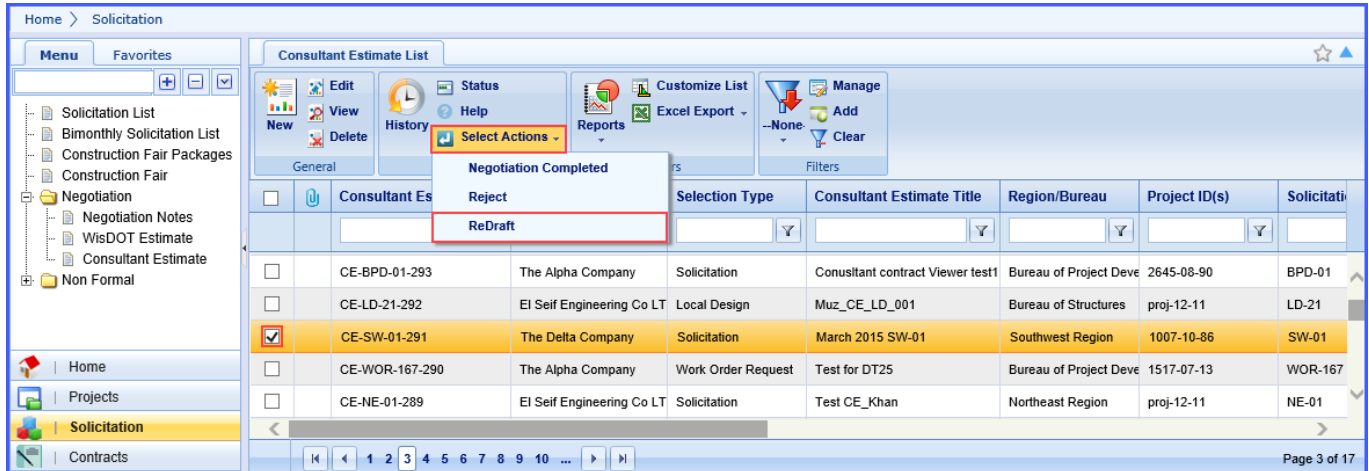
The screenshot shows the 'Consultant Estimate Project Details' window. The left navigation pane is expanded to 'Solicitation' and the project '1007-10-86-CTH N IN' is selected. The main area has tabs for 'Rate Card', 'Direct Labor Cost', 'Direct Cost', 'Fixed Fee', and 'Indirect Cost'. The 'Direct Labor Cost' tab is active, showing a 'Measurement System: IS System' and two cost summary tables. The first table, 'Cost Summary (In scope excluding If authorized)', shows costs for Direct Labor Cost, Direct Cost, Fixed Fee, and Indirect Cost. The second table, 'Cost Summary (If authorized)', shows zero costs for all categories. The total estimate is 14,218.63.

Cost Type	Amount in \$
Direct Labor Cost	3,342.00
Direct Cost	4,657.50
Fixed Fee	751.95
Indirect Cost	5,467.18
<b>Estimate Total in \$:</b>	<b>14,218.63</b>

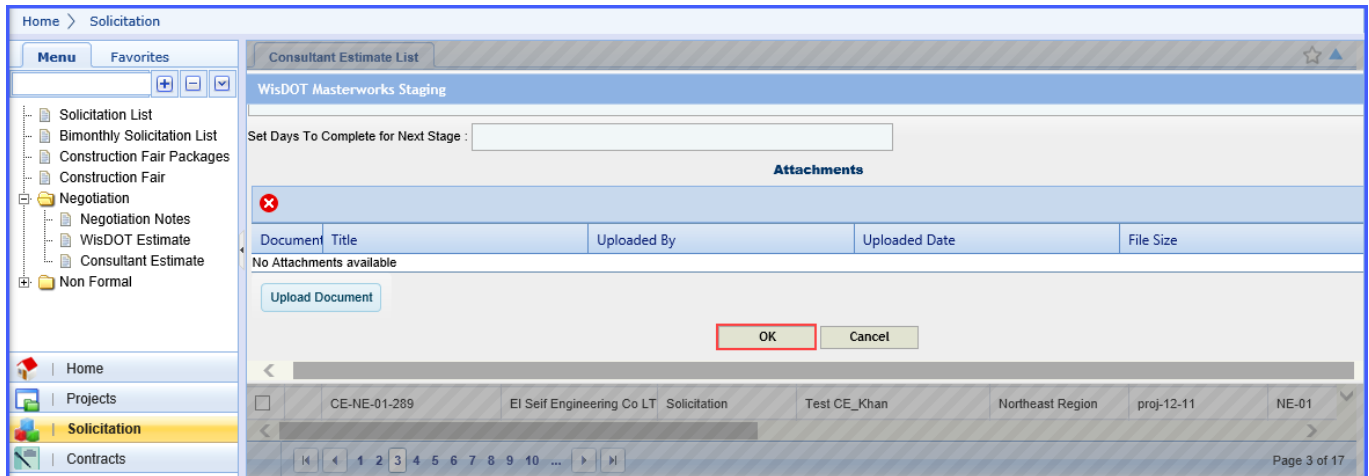
Cost Type	Amount in \$
Direct Labor Cost	0.00
Direct Cost	0.00
Fixed Fee	0.00
Indirect Cost	0.00
<b>Estimate Total Auth in \$:</b>	<b>0.00</b>

### 4.3 Returning the Negotiation for Revision

If the consultant needs to make changes to the estimate navigate to the Consultant Estimate list page. Check the box next to the negotiation and click **Select Actions** and **ReDraft**. Reject is an option that should only be used if negotiations have reached an impasse will not be proceeding.



Click **OK** on the acknowledgement screen.



Check the box next to the negotiation and click **Edit**.

	Consultant Estimate ID	SelectedConsultant	Selection Type	Consultant Estimate Title	Region/Bureau	Project ID(s)	Solicitati
<input type="checkbox"/>	CE-LD-21-292	El Seif Engineering Co LT	Local Design	Muz_CE_LD_001	Bureau of Structures	proj-12-11	LD-21
<input checked="" type="checkbox"/>	CE-SW-01-291	The Delta Company	Solicitation	March 2015 SW-01	Southwest Region	1007-10-86	SW-01
<input type="checkbox"/>	CE-WOR-167-290	The Alpha Company	Work Order Request	Test for DT25	Bureau of Project Deve	1517-07-13	WOR-167
<input type="checkbox"/>	CE-NE-01-289	El Seif Engineering Co LT	Solicitation	Test CE_Khan	Northeast Region	proj-12-11	NE-01
<input type="checkbox"/>	CE-BPD-01-288	The Alpha Company	Solicitation	Jan 2032	Bureau of Project Deve	1021-00-06, 1021-00-0	BPD-01

In the left navigation pane expand the folder with the negotiation title and click on the link with the project ID. Upload documents that are evidence of negotiations. These may include emails or notes from meetings or phone conversations. Click **Save**.

Not all details of negotiations need to be kept in masterworks. But, include a record of what was discussed in Masterworks.

Cost Type	Amount in \$	Cost Type	Amount in \$
Direct Labor Cost	3,342.00	Direct Labor Cost	0.00
Direct Cost	4,657.50	Direct Cost	0.00
Fixed Fee	751.95	Fixed Fee	0.00
Indirect Cost	5,467.18	Indirect Cost	0.00
<b>Estimate Total in \$:</b>	<b>14,218.63</b>	<b>Estimate Total Auth in \$:</b>	<b>0.00</b>
<b>Estimate Total Hours:</b>	<b>100.00</b>	<b>Estimate Total Auth Hours:</b>	<b>0.00</b>

**Attachments**

Document Name	Url/Link	Title	Uploaded By	Uploaded Date	File Size
No Attachments available					

Link Document **Upload Document**

Return to the **Consultant Estimate** page check the box next to the negotiation and click **Select Actions** and **Scope Finalized**.

Home > Solicitation

Menu Favorites

Consultant Estimate List

General: Edit, View, Delete, History, Help, Select Actions (Scope Finalized), Reports, Customize List, Excel Export, Manage, Add, Clear

	Consultant Estimate ID	SelectedConsultant	Selection Type	Consultant Estimate Title	Region/Bureau	Project ID(s)	Solicitati
<input type="checkbox"/>	CE-BPD-01-293	The Alpha Company	Solicitation	Consultant contract Viewer test1	Bureau of Project Deve	2645-08-90	BPD-01
<input type="checkbox"/>	CE-LD-21-292	EI Seif Engineering Co LT	Local Design	Muz_CE_LD_001	Bureau of Structures	proj-12-11	LD-21
<input checked="" type="checkbox"/>	CE-SW-01-291	The Delta Company	Solicitation	March 2015 SW-01	Southwest Region	1007-10-86	SW-01
<input type="checkbox"/>	CE-WOR-167-290	The Alpha Company	Work Order Request	Test for DT25	Bureau of Project Deve	1517-07-13	WOR-167

Page 3 of 17

Click **OK** on the acknowledgement screen.

Home > Solicitation

Menu Favorites

Consultant Estimate List

WisDOT Masterworks Staging

Set Days To Complete for Next Stage :

Attachments

Document	Title	Uploaded By	Uploaded Date	File Size
No Attachments available				

Upload Document

OK Cancel

<input type="checkbox"/>	CE-NE-01-289	EI Seif Engineering Co LT	Solicitation	Test CE_Khan	Northeast Region	proj-12-11	NE-01
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Page 3 of 17

A red warning message will be displayed in the upper right corner of the screen indicating that the system was unable to send a message to the consultant. Please notify the consultant that it has a new negotiation to work on.

The screenshot shows a software interface for 'Consultant Estimate Details'. On the left is a navigation menu with categories like Solicitation List, Negotiation, and Contracts. The main area contains a form with fields for Consultant Estimate ID (CE-SW-01-337), Selection Type (Solicitation), Bimonthly Solicitation Month/Year (March 2015), Region/Bureau (Southwest Region), Selected Prime Consultant (The Delta Company), and Import Task List from (Solicitation Task List). Other fields include Consultant Estimate Title (March 2015 SW-01), Bimonthly Solicitation Title (March 2015), Contract Function (Design Services), Solicitation ID (SW-01), Fixed Fee % (7.50), and Negotiation Submission Due Date (10/31/2018). A red warning message in the top right corner reads: 'Please contact the consultant that the Scope is Finalized.' Below the form is a table titled 'Projects (In scope excluding if authorized)' with columns for Project Name, Direct Labor Cost in \$, Direct Cost in \$, Indirect Cost in \$, Fixed Fee in \$, Marked as Final, Total Hours, Total in \$, and limit.

Project Name	Direct Labor Cost in \$	Direct Cost in \$	Indirect Cost in \$	Fixed Fee in \$	Marked as Final	Total Hours	Total in \$	limit
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## 5 Revising the Estimate – Consultant

To begin revising the estimate check the box next to the negotiation and click **Edit**.

	Consultant Estimate ID	Selected Consultant	Selection Type	Consultant Estimate Title	Region/Bureau	Project ID(s)	Solicitation
<input type="checkbox"/>	CE-SW-01-337	The Delta Company	Solicitation	March 2015 SW-01	Southwest Region	1007-10-86	SW-01
<input checked="" type="checkbox"/>	CE-SW-01-291	The Delta Company	Solicitation	March 2015 SW-01	Southwest Region	1007-10-86	SW-01
<input type="checkbox"/>	CE-NC-01-242	The Alpha Company	Solicitation	18 05 16	North Central Region	1004-19-86	NC-01
<input type="checkbox"/>	CE-SW-03-189	The Alpha Company	Solicitation	180404-03 sub test	Southwest Region	1007-10-86	SW-03
<input type="checkbox"/>	CE-SW-02-182	The Delta Company	Solicitation	1408 SW-02	Southwest Region	1007-10-86	SW-02

Change may now be made to the Rated Cards, Direct Labor Cost and Direct Cost. Revise the Estimate using the steps outlined in Section 2: Consultant Estimate – Consultant

**Consultant Estimate ID:** CE-SW-01-291  
**Solicitation ID:** SW-01      **Bimonthly Solicitation Month and Year:** March 2015  
**Project ID:** 1007-10-86      **Project Name:** ILLINOIS STATE LINE - MADISON  
**Description:**   
**Measurement System:** IS System

If the Direct Labor Cost needs to be revised, click Unmark Final before making changes.

The screenshot shows a software application window with a navigation pane on the left and a main content area. The main content area has a ribbon with tabs: Consultant Estimate, Project Details, Rate Card, **Direct Labor Cost**, Direct Cost, Fixed Fee, and Indirect Cost. The 'Direct Labor Cost' tab is active and contains a ribbon with buttons: View, Save, Reports, Customize List, Mark Final, and Unmark Final. The 'Unmark Final' button is highlighted with a red box. Below the ribbon is a table with the following columns: Name, Sublet Status, Consultant/Subcor, and In Scope. The table contains several rows of project data.

Name	Sublet Status	Consultant/Subcor	In Scope
Project Management			
Scope, Schedule and Change Management			
887 Manage Project Scope and Schedule			
887.0 Manage Project Scope and Schedule		The Delta Company	Yes
884 Manage Change			

## 6 Complete Negotiation – WisDOT

After the final price has been agreed to the negotiation needs to be completed.

From the Consultant Estimate list page use the checkbox to select the negotiation. Click on **Select Actions** and **Negotiation Completed**.

The screenshot shows the 'Consultant Estimate List' interface. On the left is a navigation tree with 'Consultant Estimate' highlighted. The main area contains a table of estimates. The second row is selected, and a context menu is open over it, showing 'Negotiation Completed' as the chosen action.

	Consultant Es		Selection Type	Consultant Estimate Title	Region/Bureau	Project ID(s)	Solicitation
<input type="checkbox"/>	CE-LD-21-292	EI Self Engineering Co LT	Local Design	Muz_CE_LD_001	Bureau of Structures	proj-12-11	LD-21
<input checked="" type="checkbox"/>	CE-SW-01-291	The Delta Company	Solicitation	March 2015 SW-01	Southwest Region	1007-10-86	SW-01
<input type="checkbox"/>	CE-WOR-167-290	The Alpha Company	Work Order Request	Test for DT25	Bureau of Project Deve	1517-07-13	WOR-167
<input type="checkbox"/>	CE-NE-01-289	EI Self Engineering Co LT	Solicitation	Test CE Khan	Northeast Region	proj-12-11	NE-01

Click **OK** on the acknowledgement screen.

The screenshot shows a 'WisDOT Masterworks Staging' dialog box titled 'Attachments'. It contains a table with columns for Document, Title, Uploaded By, Uploaded Date, and File Size. Below the table is an 'Upload Document' button. At the bottom of the dialog, the 'OK' button is highlighted with a red box.

Document	Title	Uploaded By	Uploaded Date	File Size
No Attachments available				



From the **Consultant Estimate** list page use the checkbox to select the negotiation. Click on **Select Actions** and **Approved for Contract**.

The screenshot shows the 'Consultant Estimate List' interface. On the left is a navigation menu with 'Consultant Estimate' highlighted. The main area contains a table of estimates. The second row is selected, and a context menu is open over it, with 'Approved for Contract' highlighted. The table has columns for Selection Type, Consultant Estimate Title, Region/Bureau, Project ID(s), and Solicitation.

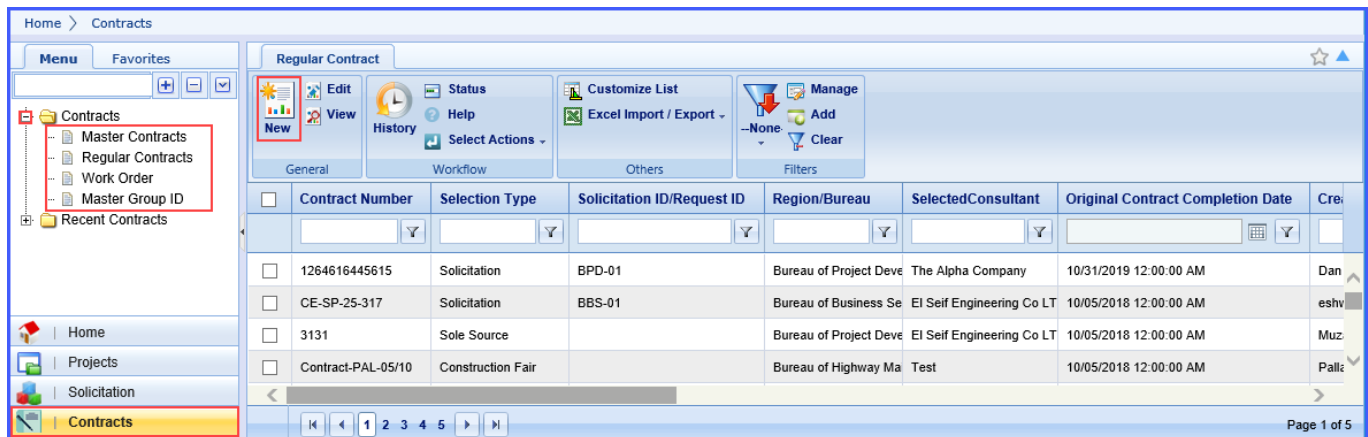
	Selection Type	Consultant Estimate Title	Region/Bureau	Project ID(s)	Solicitation
<input type="checkbox"/>	Local Design	Muz_CE_LD_001	Bureau of Structures	proj-12-11	LD-21
<input checked="" type="checkbox"/>	Solicitation	March 2015 SW-01	Southwest Region	1007-10-86	SW-01
<input type="checkbox"/>	Work Order Request	Test for DT25	Bureau of Project Deve	1517-07-13	WOR-167
<input type="checkbox"/>	Solicitation	Test CE Khan	Northeast Region	proj-12-11	NE-01

Click **OK** on the acknowledgement screen.

The screenshot shows an acknowledgement dialog box titled 'WisDOT Masterworks Staging'. It includes a 'Set Days To Complete for Next Stage' field, an 'Attachments' section with an 'Upload Document' button, and 'OK' and 'Cancel' buttons at the bottom. The 'OK' button is highlighted with a red box. The background shows the same table as the previous screenshot.

## 7 Create a Contract – WisDOT

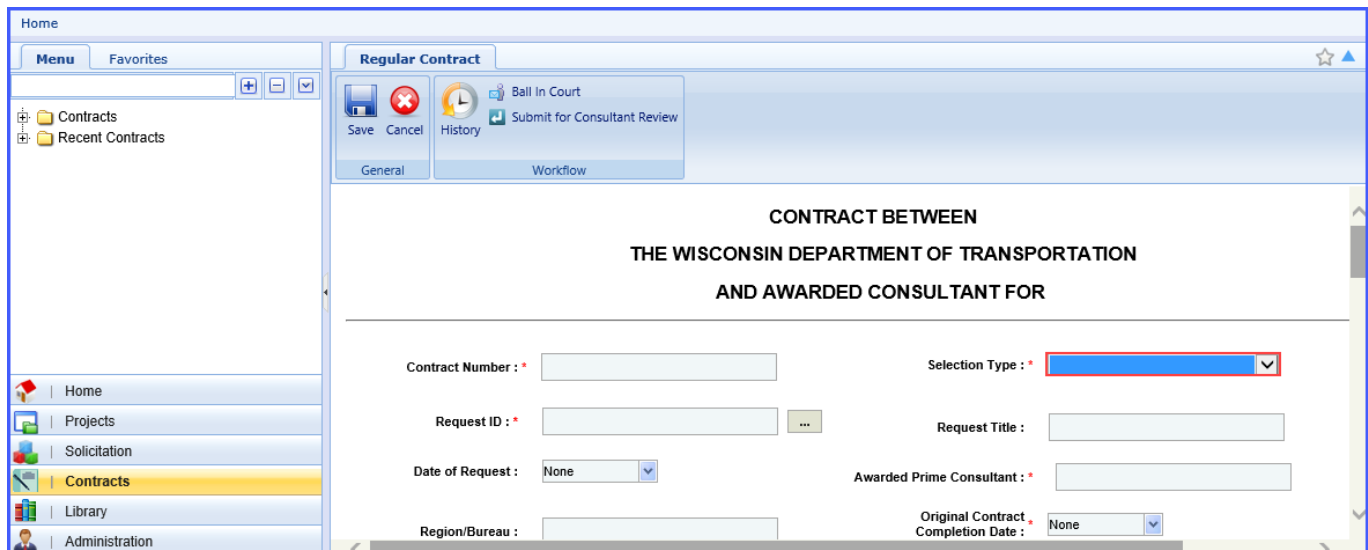
To create a new contract, click on the Contracts module. Expand the Contracts folder in the left navigation pane and click on the type of contract to be created. Master Contracts are created only by Central Office. Regular Contracts include contracts from bimonthly solicitations, construction fair, small purchase and sole source. Click on the **New** button.



The screenshot shows the 'Regular Contract' form in the WisDOT system. The left navigation pane is expanded to 'Contracts', and the 'New' button is highlighted. The main area displays a table of existing contracts with the following data:

Contract Number	Selection Type	Solicitation ID/Request ID	Region/Bureau	Selected Consultant	Original Contract Completion Date	Cre:
1264616445615	Solicitation	BPD-01	Bureau of Project Deve	The Alpha Company	10/31/2019 12:00:00 AM	Dan
CE-SP-25-317	Solicitation	BBS-01	Bureau of Business Se	EI Seif Engineering Co LT	10/05/2018 12:00:00 AM	eshv
3131	Sole Source		Bureau of Project Deve	EI Seif Engineering Co LT	10/05/2018 12:00:00 AM	Muz
Contract-PAL-05/10	Construction Fair		Bureau of Highway Ma	Test	10/05/2018 12:00:00 AM	Palle

Choose the **Selection Type**.



The screenshot shows the 'Regular Contract' form in the WisDOT system. The 'Selection Type' dropdown menu is highlighted, and the form fields are as follows:

**CONTRACT BETWEEN**  
**THE WISCONSIN DEPARTMENT OF TRANSPORTATION**  
**AND AWARDED CONSULTANT FOR**

Contract Number : \* [Text Field]  
 Selection Type : \* [Dropdown Menu]  
 Request ID : \* [Text Field] ... [Ellipsis]  
 Request Title : [Text Field]  
 Date of Request : [Dropdown Menu: None]  
 Awarded Prime Consultant : \* [Text Field]  
 Region/Bureau : [Text Field]  
 Original Contract Completion Date : \* [Dropdown Menu: None]

Fill in the fields with the required information. Enter the **Contract Number** from CARS. Use the ellipses to select the **Construction Fair Title**. Use the ellipses to select the **Construction Fair Package ID**. Use the ellipses to select the **Awarded Prime Consultant**. Add the **Original Contract Completion Date**. Select Regular as the **Type of Contract**. Add the Account Code to the projects table. Type a short Description of Services. Add the WisDOT Representative and Consultant Representative.

Home
Regular Contract ☆

Menu Favorites

- Contracts
  - Master Contracts
  - Regular Contracts
  - Work Order
  - Master Group ID
- Recent Contracts

Save
Cancel
History
Ball in Court

Submit for Consultant Review

General
Workflow

**CONTRACT BETWEEN**  
**THE WISCONSIN DEPARTMENT OF TRANSPORTATION**  
**AND AWARDED CONSULTANT FOR**

Contract Number : \*

Selection Type : \* Construction Fair ▼

Construction Fair Title : \*  ...

Construction Fair Month and Year :

Construction Fair Number :

Construction Fair Package ID : \*  ...

Region/Bureau :

Awarded Prime Consultant : \*  ...

Consultant Estimate ID : \*

Original Contract Completion Date : None ▼

Created By : Mitch Patoka

Type of Contract : \*  ▼

Last Updated By :

Created Date : 10/22/2018

Last Update Date : 10/22/2018

**Projects**

Project ID	Project Description	Project Limits	Route	County	Account Code	Contract Amount Project
No records to display.						

**Edit**

Description of Services :

**WisDOT Department Representative**

Contact Name	Title	Work Address	Email	Telephone
No records to display.				

**Add** **Edit** **Delete**

**Consultant Representative**

Contact Name	Work Address	Email	Telephone
No records to display.			

**Add** **Edit** **Delete**

Consultant Services to be performed at Departments office located at :

Deliver Project Documents to :

Compensation for all services provided by PRIME CONSULTANT under terms of the contract shall be for an amount not to exceed in \$: 0.00

If Authorized, Contract Amount in \$: 0.00

DBE Goal Set :  ▼

**Attachments**

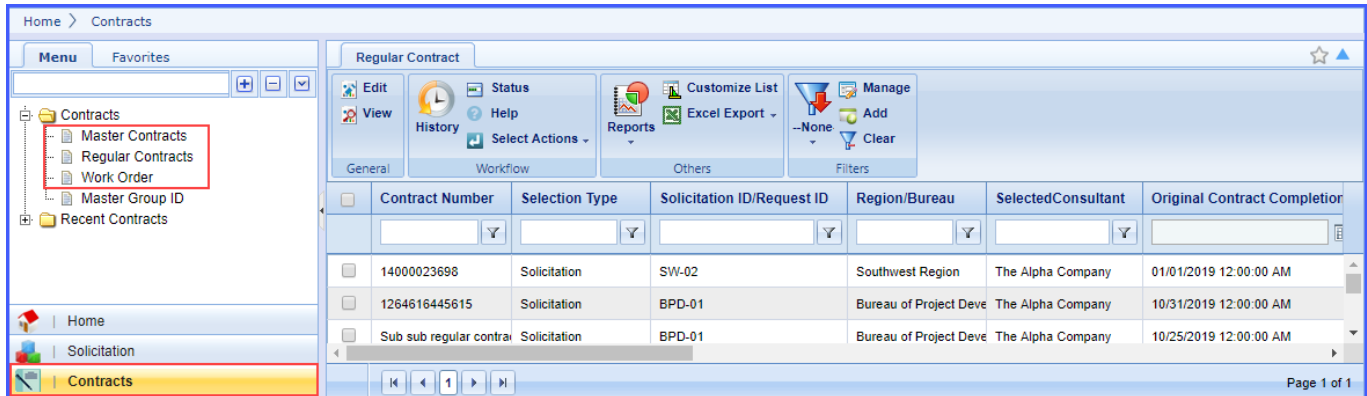
Title
No records to display.

**Add** **Edit** **View** **Delete**

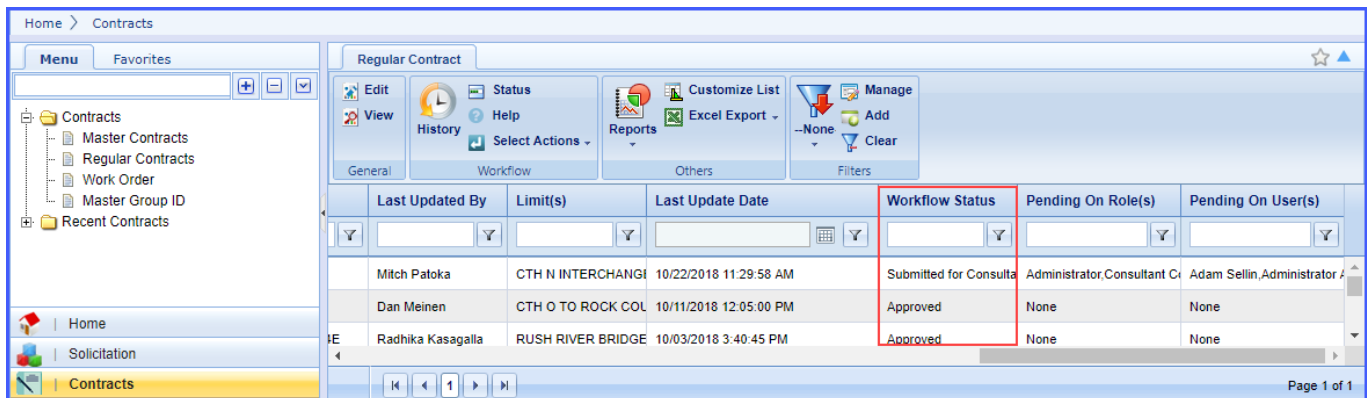
- Home
- Projects
- Solicitation
- Contracts
- Library
- Administration

## 8 Review Contract – Consultant

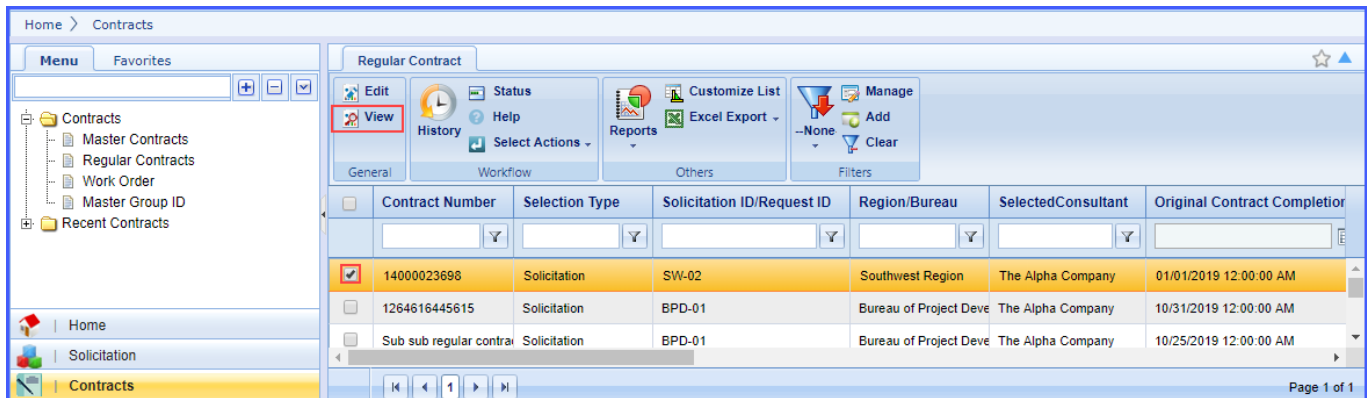
Navigate to the **Contracts** module and expand the folder **Contracts** which contains four links: **Master Contracts** to view master contracts, **Regular Contracts** to view contracts from bimonthly and construction fair solicitations and small purchase and sole source requests and **Work Order** to view work orders. Consultants cannot view the Master Group ID link.



Contracts/Work Orders requiring consultant approval have a **Workflow Status** of “Submitted for Consultant Review.”



To view the contract, check the box next to the contract and click **View**.

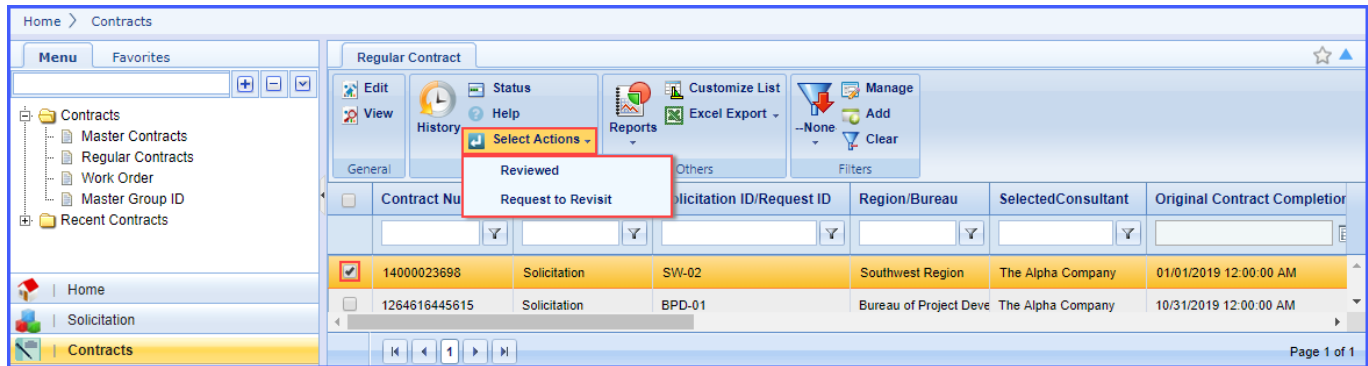


Review the contract. Click **Cancel** to return to the list page.

Check the box next to the negotiation and click **Select Actions**. Clicking **Reviewed** will approve the contract. Clicking **Request to Revisit** will send it back to WisDOT for revisions.

## 9 Submit Contract for Approval - WisDOT

After the contract has been approved by the consultant check the box next to the contract and click **Select Actions**. Click **Submit for Approval** to send the contract for approval in Central Office. Click **Redraft** if changes need to be made to the contract.



The screenshot displays the 'Regular Contract' view in the WisDOT system. A table lists contracts with columns for Contract Number, Solicitation, Solicitation ID/Request ID, Region/Bureau, Selected Consultant, and Original Contract Completion Date. The first row is selected, and the 'Select Actions' dropdown menu is open, showing options like 'Reviewed' and 'Request to Revisit'.

Contract Number	Solicitation	Solicitation ID/Request ID	Region/Bureau	Selected Consultant	Original Contract Completion Date
<input checked="" type="checkbox"/> 14000023698	Solicitation	SW-02	Southwest Region	The Alpha Company	01/01/2019 12:00:00 AM
<input type="checkbox"/> 1264616445615	Solicitation	BPD-01	Bureau of Project Deve	The Alpha Company	10/31/2019 12:00:00 AM

**After clicking Submit for Approval send a completed DT25 to Diane Phaneuf.**