Complete a Consultant Report

2/1/2021

Wisconsin Department of Transportation

Table of Contents

Version Notes

Version 1.0

- None

1   Additional Information

See Guide *Navigate to Consultant Information* to find the Consultant Report.

The user must have the **Consultant – CR** role assigned to complete a consultant report.

Notifications are sent to consultant users with the following roles at the following changes in workflow status.
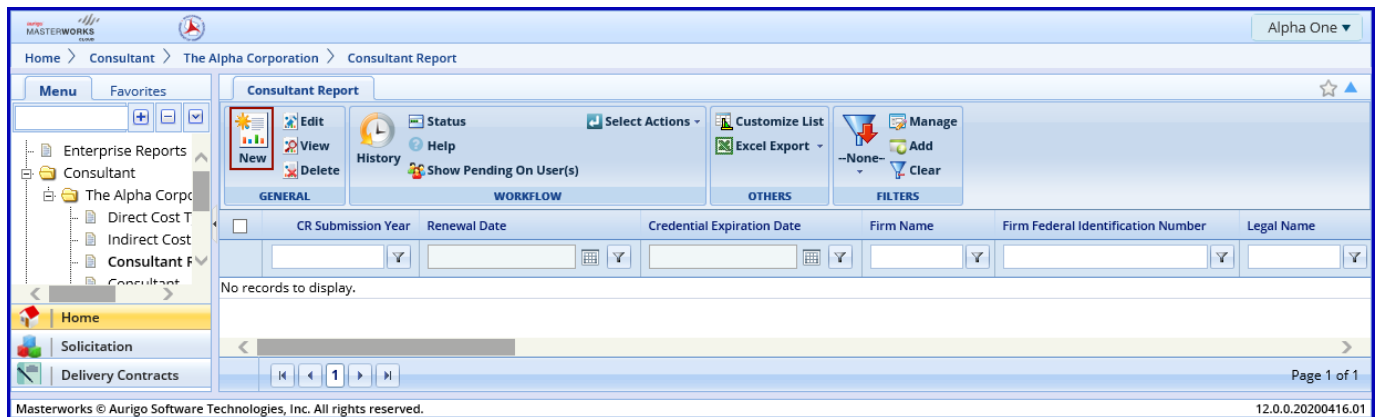
All users assigned the **Consultant – CR** role will receive a notification email from Masterworks when the CR has been Approved, Returned for more info or Rejected.

All users assigned the **Consultant – CR** role will be cc'd on the notification email sent to the Department when the CR has been Submitted, Resubmitted or Reopened.

All users assigned the **Consultant – CR** role will receive a notification email from Masterworks as a Renewal Reminder one month prior to the Renewal Date of the CR.

2   Create a Consultant Report

Click **New** to start a new Consultant Report.

2.1   Add Firm Information

Beginning at the top of the form add:

1. **Legal Name**: the firm's legal name of incorporation
2. **Firm type**: Choose **Private Entity** from the dropdown menu
3. **Year Present Firm Established**: **Year** the current entity was incorporated
4. **Fiscal Year End Month and Date**: **Month** and **Day** the firm's fiscal year ends
5. **Name of Parent Company & Address**: If the firm is a subsidiary list the parent company; otherwise leave blank
6. **CR Submission Year**: Choose the current **Year** from the dropdown menu

Complete a Consultant Report

Continue to complete the form:

1. **Affiliated Consultants and Contractors**: All other consultants and contractors which the firm is associated
2. **Previous Firm Names**: Enter all other names the firm has done business under
3. **WI Architectural or Engineering Corp Certificate of Authorization Credential # Applicable?:** If choosing to purse engineering services for WisDOT use the default Applicable option; otherwise choose Not Applicable from the dropdown menu
4. **WI Architectural or Engineering Corp Certificate of Authorization Credential #:** If box 3 is set to Applicable, enter the credential number; if box 3 is set to Not Applicable, box 4 will not be present
5. **Credential Expiration Date:** If box 3 is set to Applicable, enter the date the current credential expires; if box 3 is set to Not Applicable, box 5 will not be present
6. **Is DBE:** If the firm is an accepted DBE, choose Yes from the dropdown menu; otherwise choose No
7. **DBE Type of Ownership:** If the firm is a DBE, select the DBE type; if box 6 is set to No, box 7 will not be present
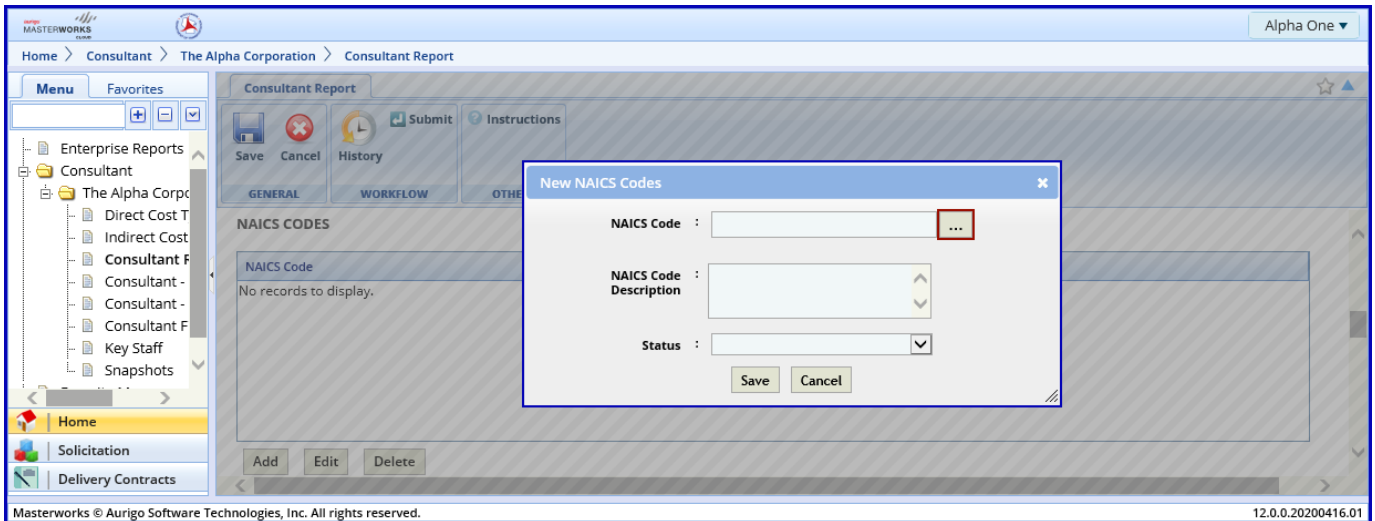
2.2 Add NAICS Codes

If the firm is a DBE, add applicable NAICS codes, otherwise move to the next section.
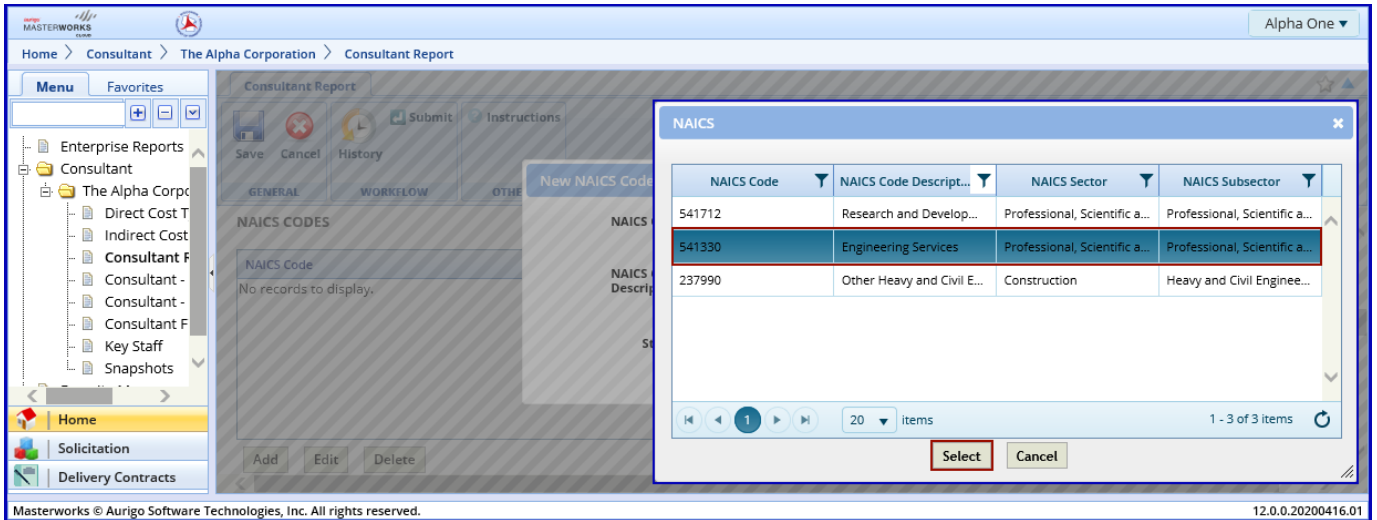
Click **Add** under the NAICS CODES table.
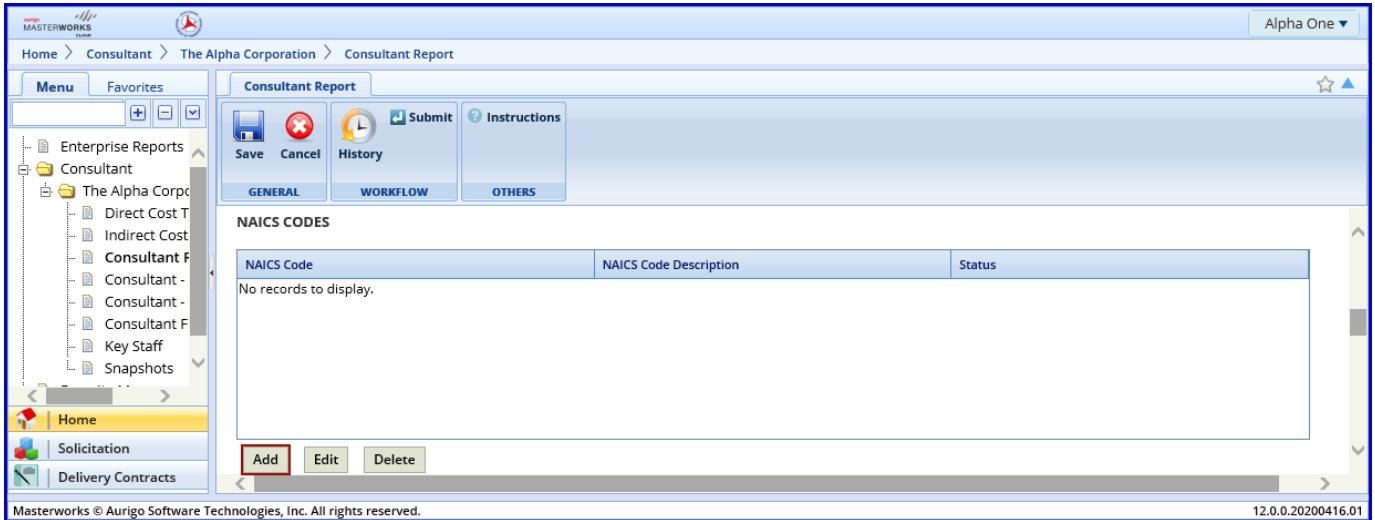
In the popup box that appears click on the **ellipses …** .
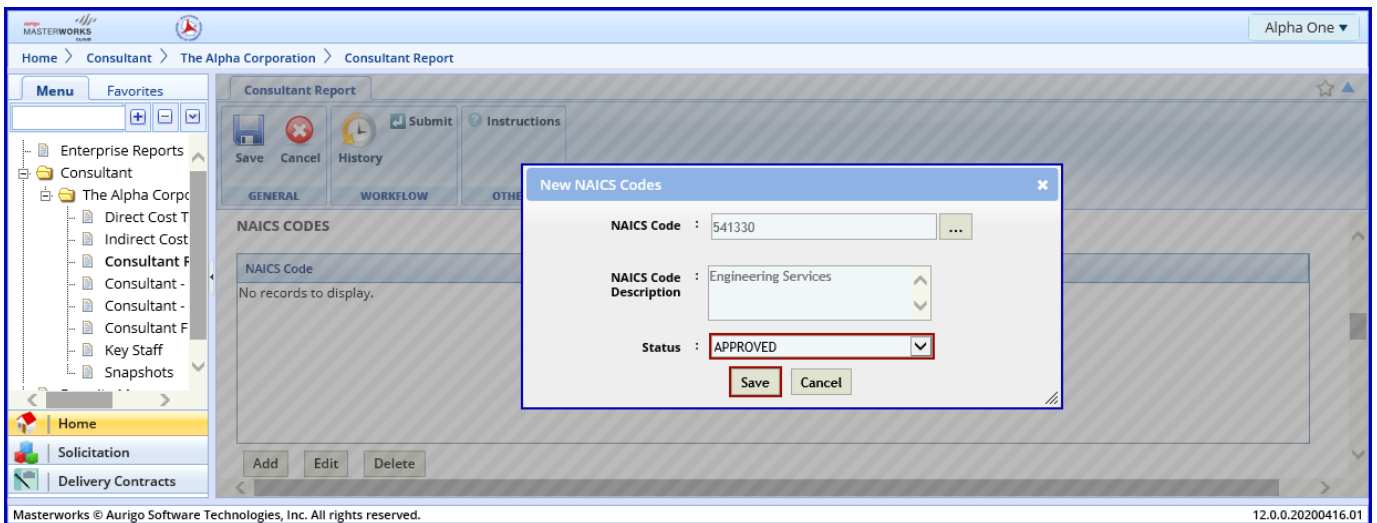
Complete a Consultant Report
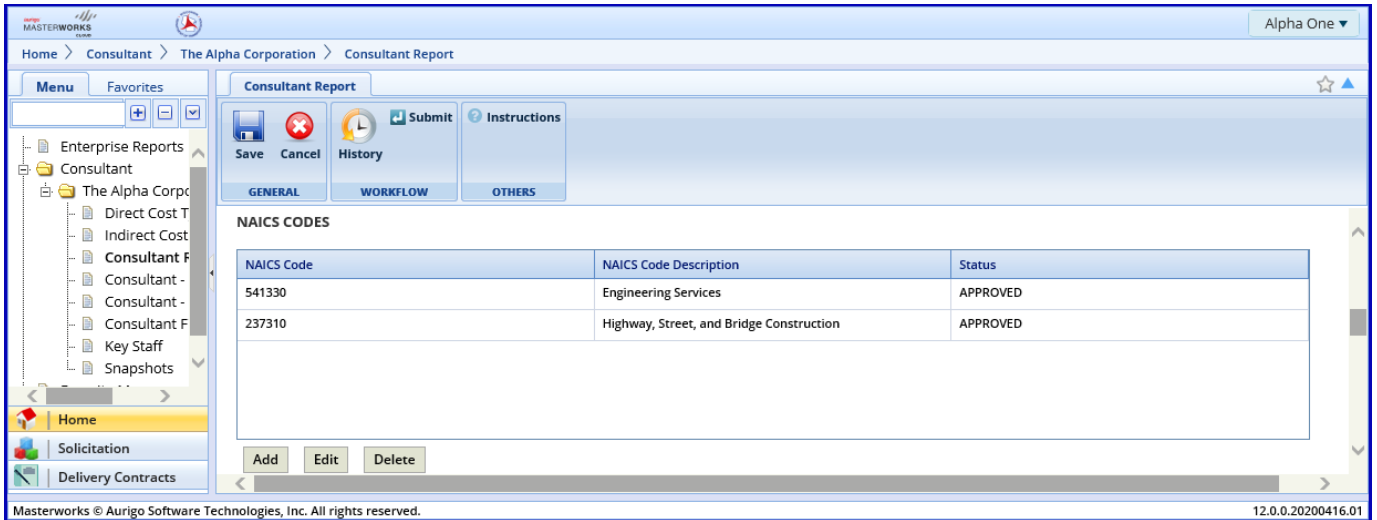
Select a **NAICS Code**, using the filters if necessary, and click **Select**.

Set the **Status** to **APPROVED** using the dropdown menu. Pending codes should not be included. Click **Save**.

Complete a Consultant Report

Add additional NAICS codes as necessary.

2.3 Add Contact Information

Add the contact information of at least one senior manager.

Click **Add** under the CONTACT INFORMATION table.

Complete a Consultant Report

Complete the field for **Name**, **Title**, **Telephone**, **Email** and **Contact Type**. Click **Save**.

There are two Contact Types, "Primary" and "Secondary". Up to two contacts may be identified as Primary. Primary contacts will receive notification emails from WisDOT, in addition to Masterworks users with a solicitation role. Secondary contacts may be contacted by WisDOT to resolve other questions.
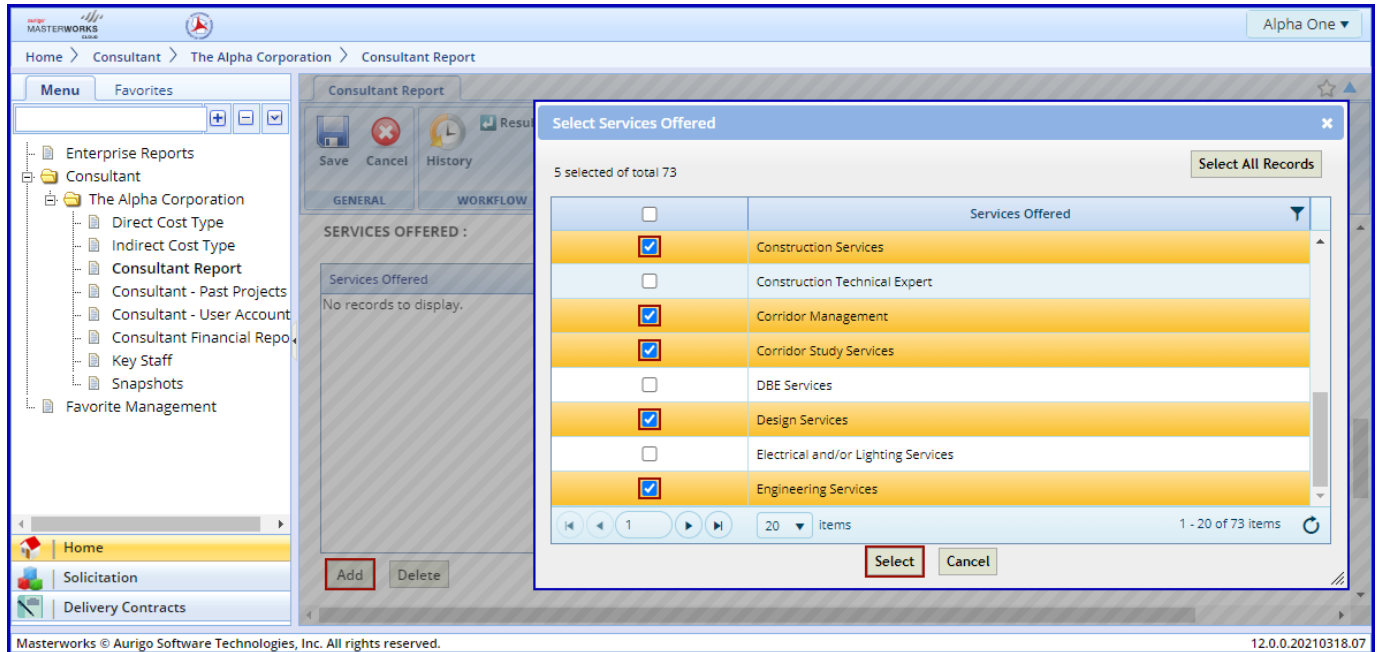

Add additional contacts as necessary.

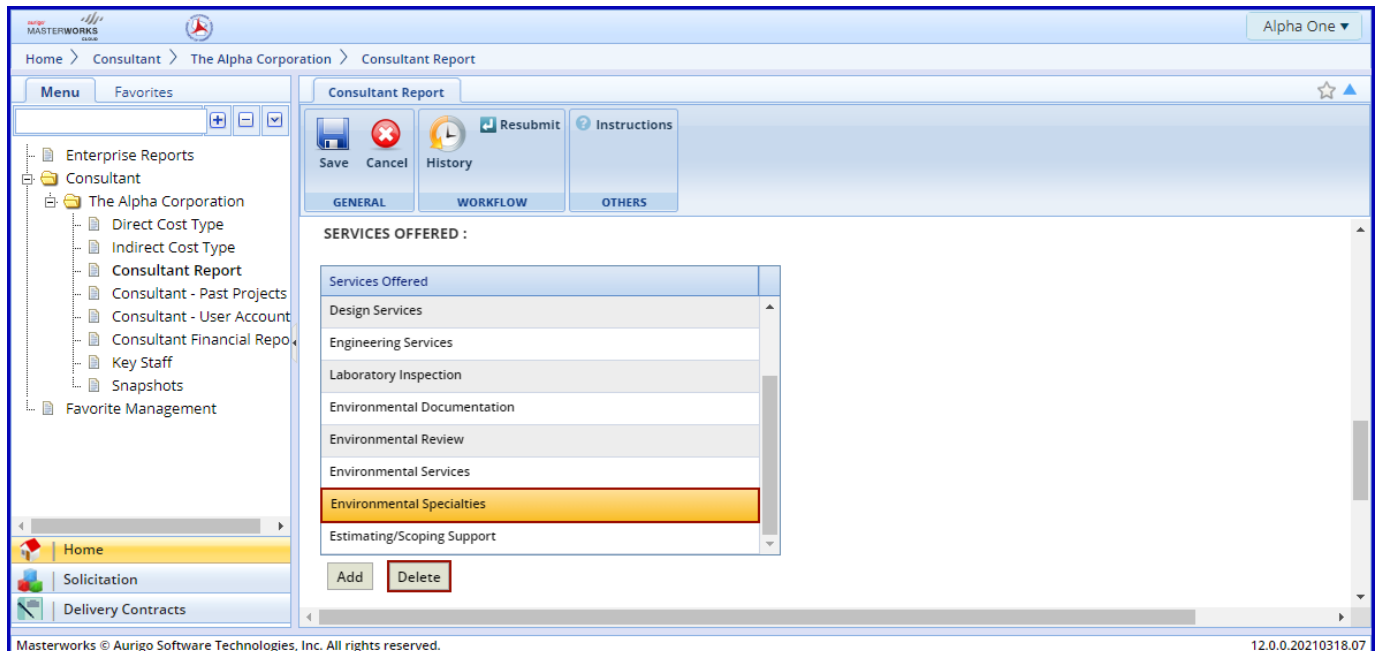Complete a Consultant Report

2.4   Add Services Offered

Add the types of services the firm performs.

Click **Add** underneath the **SERVICES OFFERED**. Select one or more services from the popup and click **Select**.

If a service the firm offers is not on the list, add only the services the firm offers.
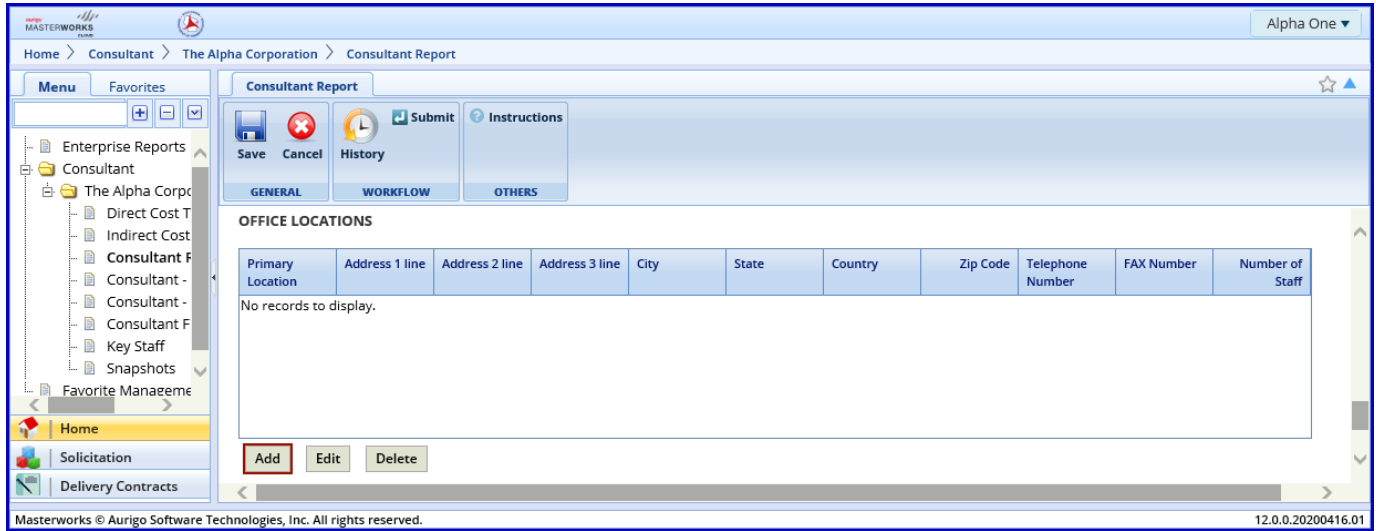

If a service needs to be removed select it and click **Delete**.

2.5 Add Office Locations

Click **Add** under the **OFFICE LOCATIONS** grid to add the first office.

If the office is the **Primary Location** use the dropdown and select Yes; otherwise leave the default No. Add the address using **Address 1 line**, **Address 2 line** and **Address 3 line**; **Zip Code**; **Telephone Number**; **FAX Number** and **Number of Staff** (at that location.)
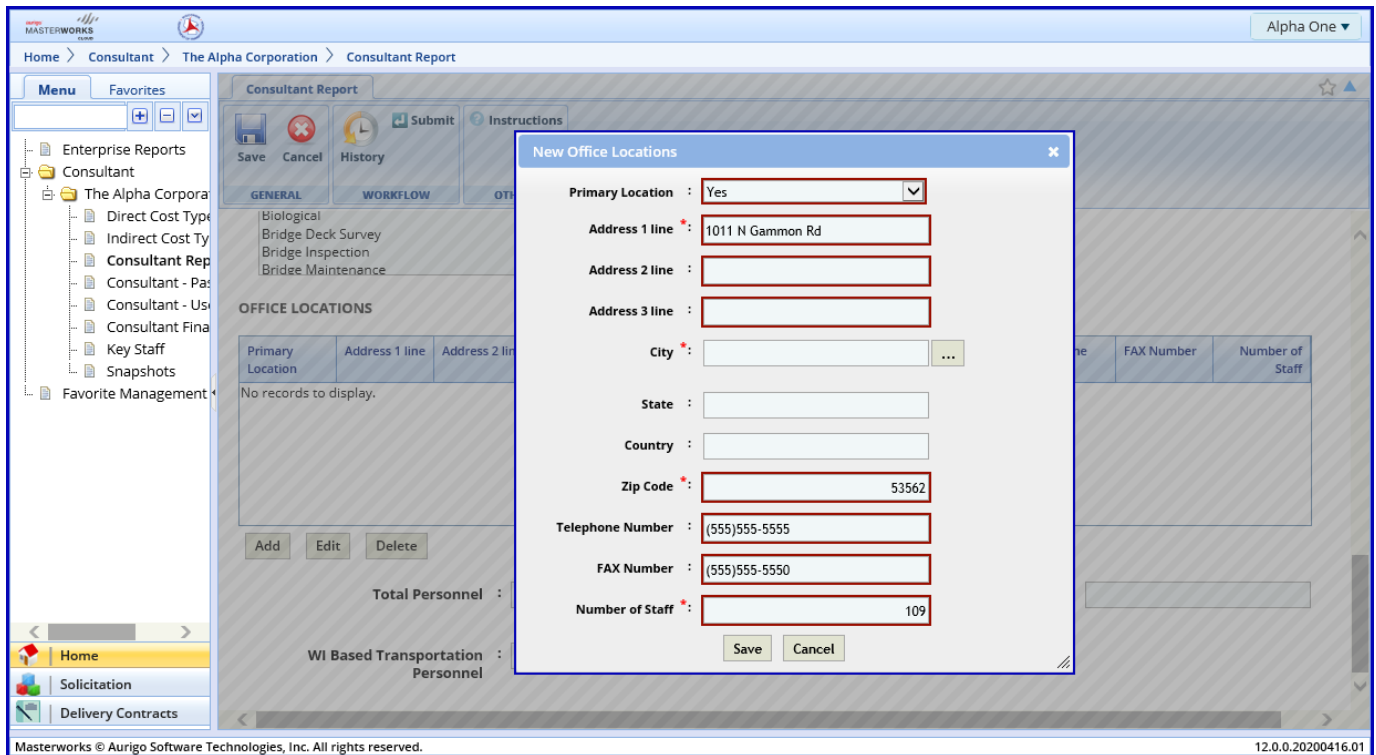
Complete a Consultant Report

Add the City, State and Country by clicking on the ellipses **…** next to **City**.

In the popup select a city, using the filters, and click **Select**.

Complete a Consultant Report

After all information has been added click **Save**.

Add additional locations if necessary.

2.6   Add Personnel

Add the number of personnel employed.

1. **Total Personnel**: Total number of employees employed by the firm.
2. **WI Based Personnel**: Total number of employees based in Wisconsin
3. **WI Based Transportation Personnel**: Number of employees performing transportation services

2.7   Saving and/or Submitting

2.7.1   Save for Later

To save the report for later click the **Save** button at any time.

Complete a Consultant Report

2.7.2   Save and Submit

To save and submit the report from the form screen, click **Submit**.

Click **OK** on the acknowledgement screen.
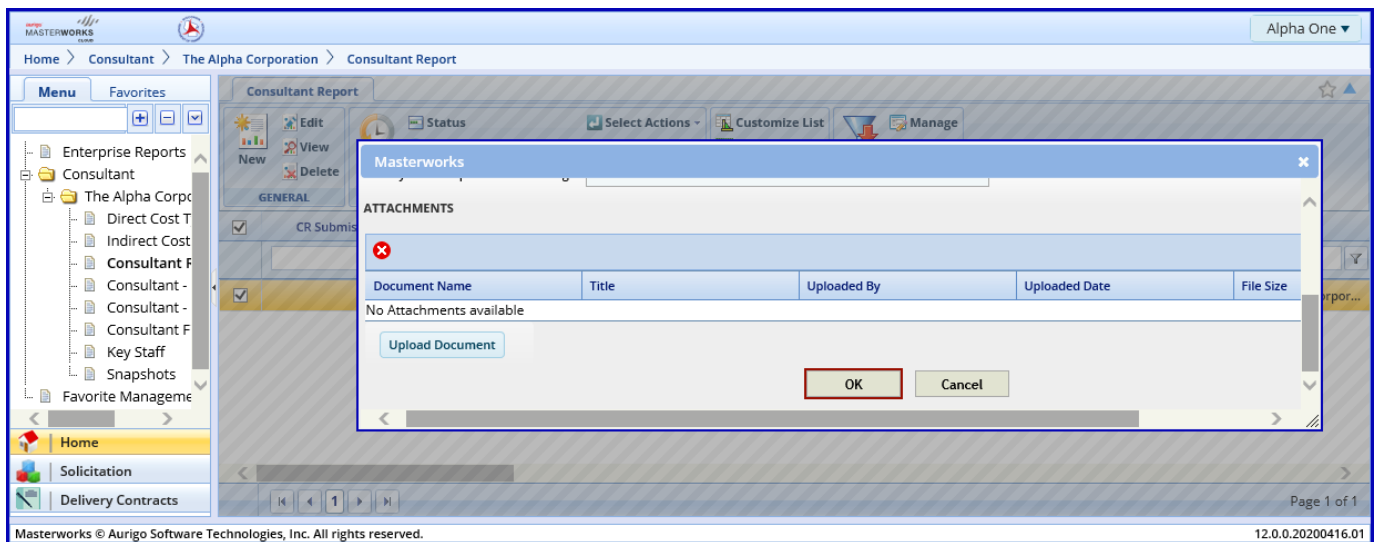
2.7.3   Submit from the List Page

To submit from the list page, select the report using the checkbox ✓ and click **Select Actions**, then **Submit**.
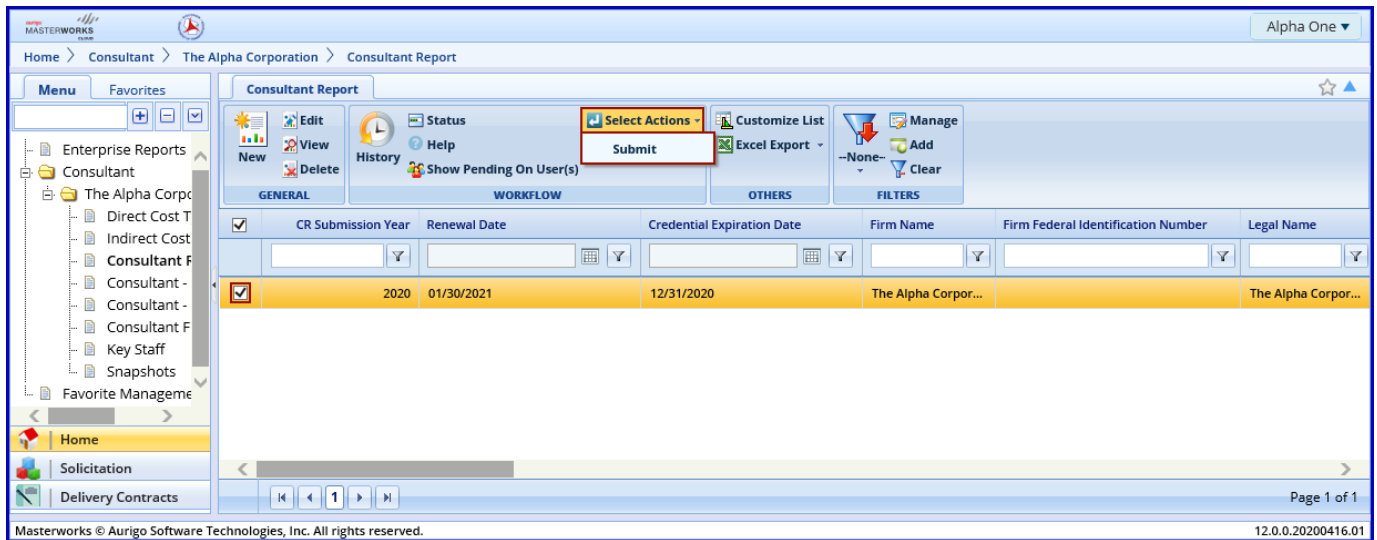
Click **OK** on the acknowledgement screen.

The form has now been submitted to WisDOT

2.8   View Status

The consultant report flows through the following statuses:

- Draft: Viewable only to the consultant and the consultant may make updates
- Submitted: Under review by WisDOT
- Approved: Accepted by WisDOT
- Returned for more info: Returned to the consultant for revisions
- Rejected: Not accepted by WisDOT
- Returned for Re-submission: Reopened by consultant to make updates

Complete a Consultant Report

2.8.1 View Current Status

To view the current status from the list page, scroll to be able to see the **Workflow Status** column.

2.8.2 View Complete History

To view the complete history, select the report using the checkbox ✓ and click **History**.
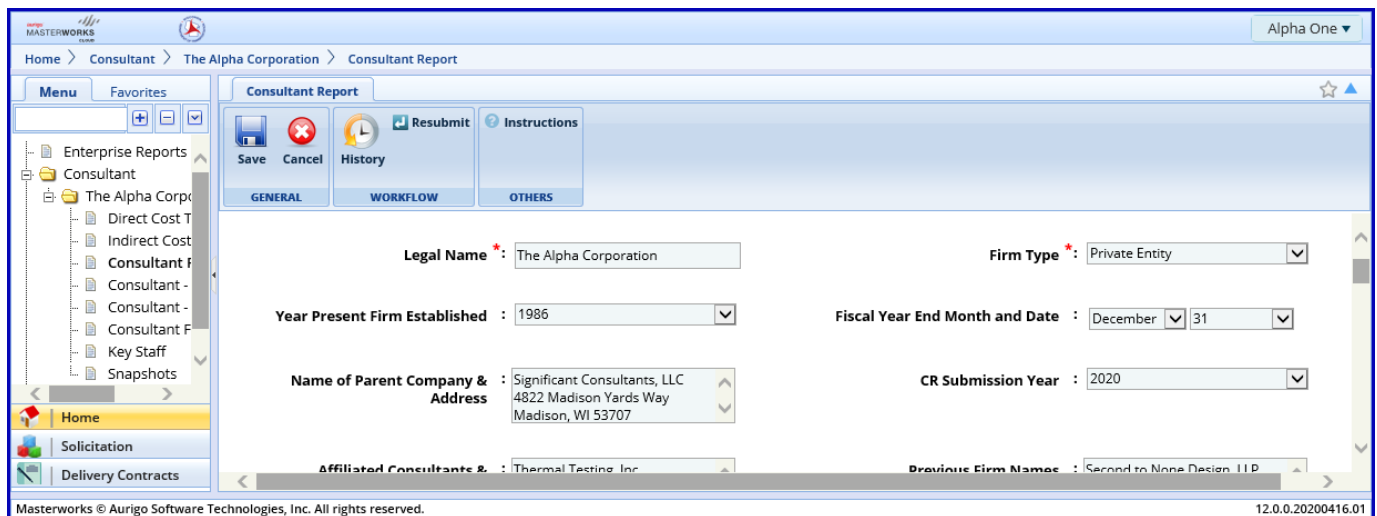
2.9   Complete Consultant Report

If a report was saved without submitting or returned by WisDOT for more info the report may be edited.

To complete a report that has been saved or returned by WisDOT to make changes, select the report using the checkbox ✓ and click **Edit**.
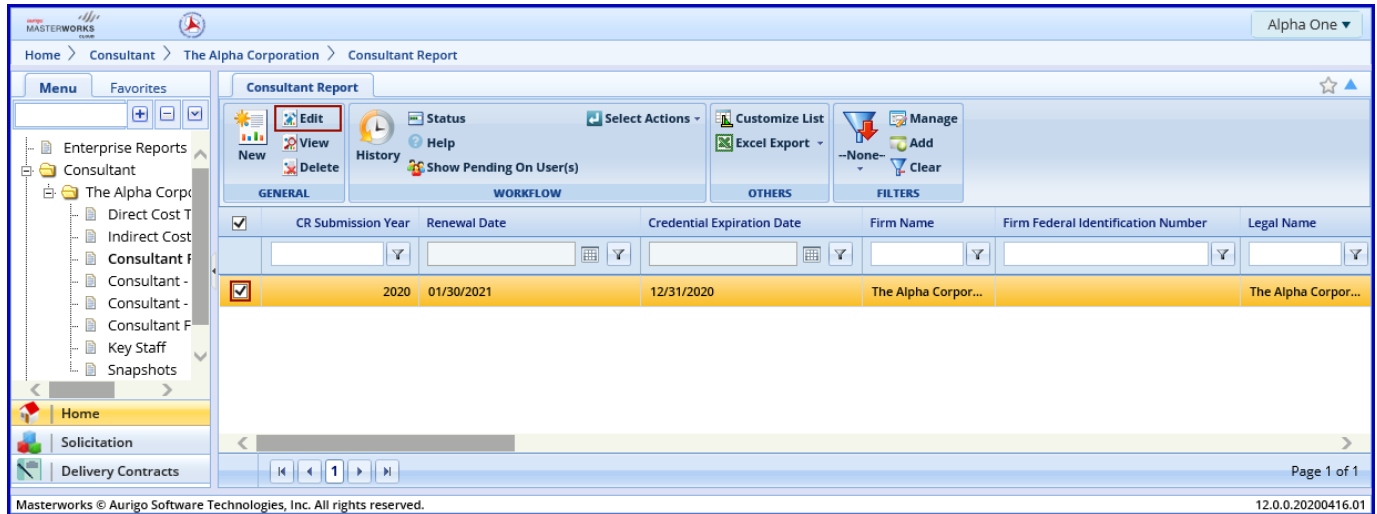
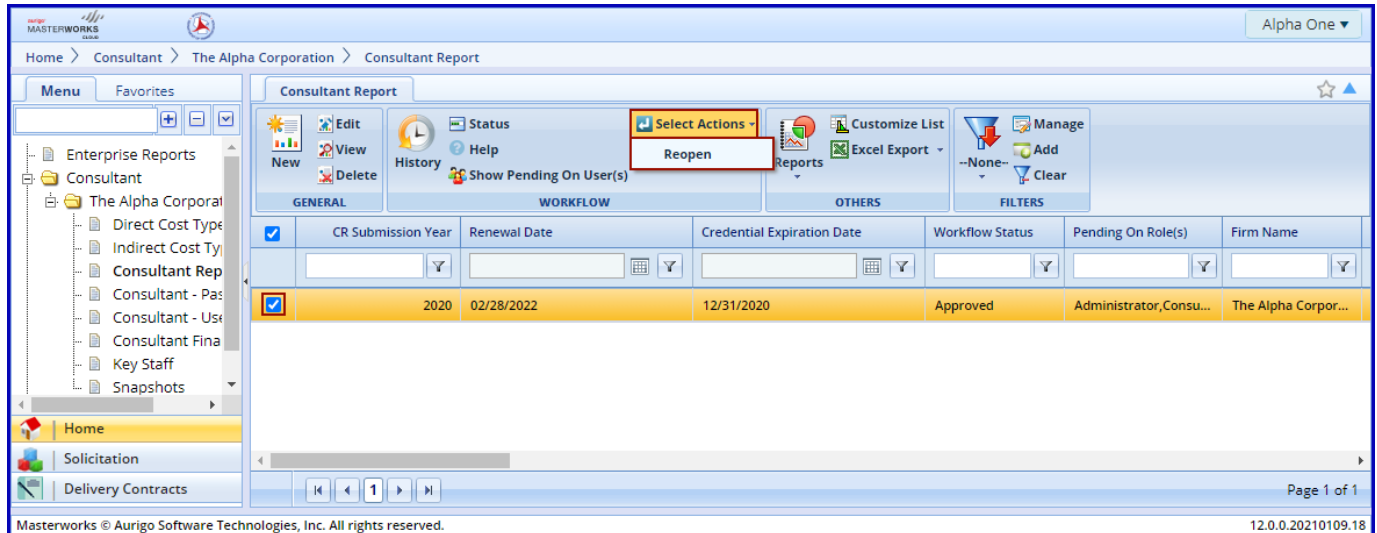The form may now be completed/updated. Resubmit as shown above.

2.10 Update an Approved Report

An approved Consultant Report may be resubmitted if the firm's information needs to be updated before the next Consultant Report is due. For example to update an address.
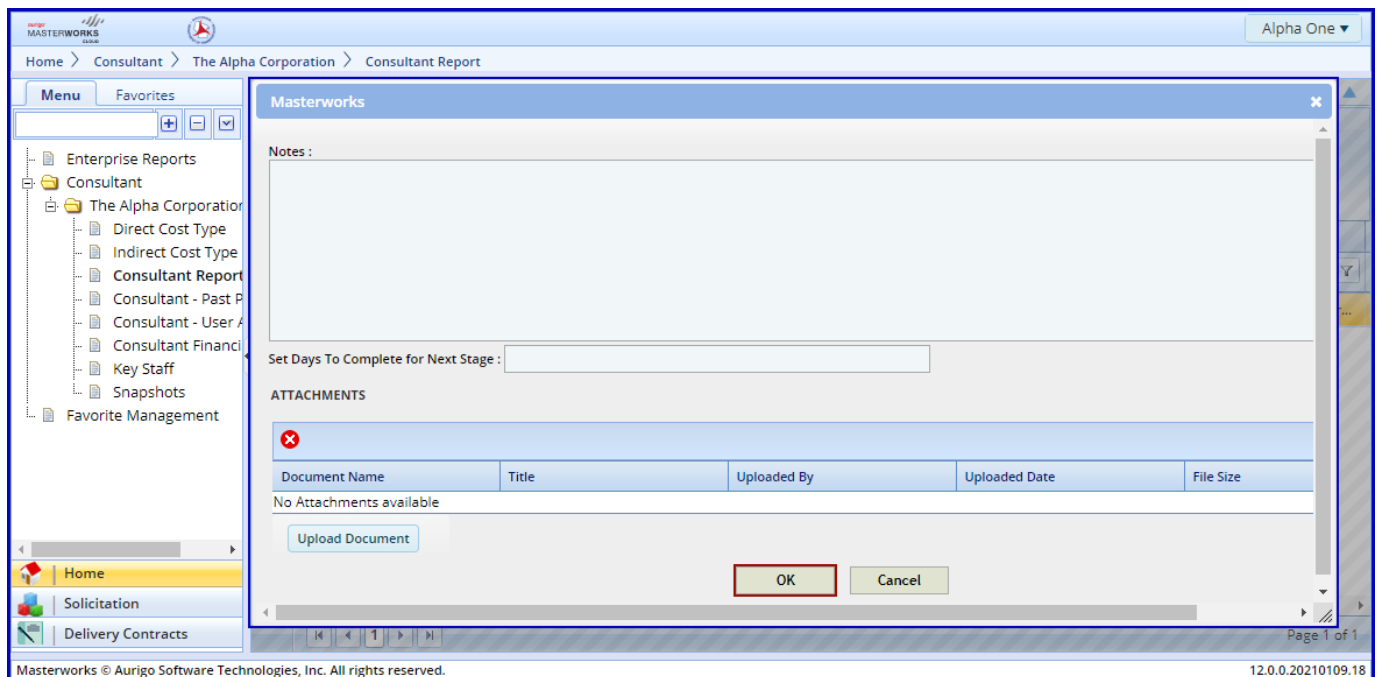
Select the report using the checkbox ✓, click **Select Actions** and **Reopen**.

Click **OK** on the acknowledgement screen.

Complete a Consultant Report

The workflow status is now **Returned for Re-submission**. Select the report using the checkbox ✓, and click **Edit**.
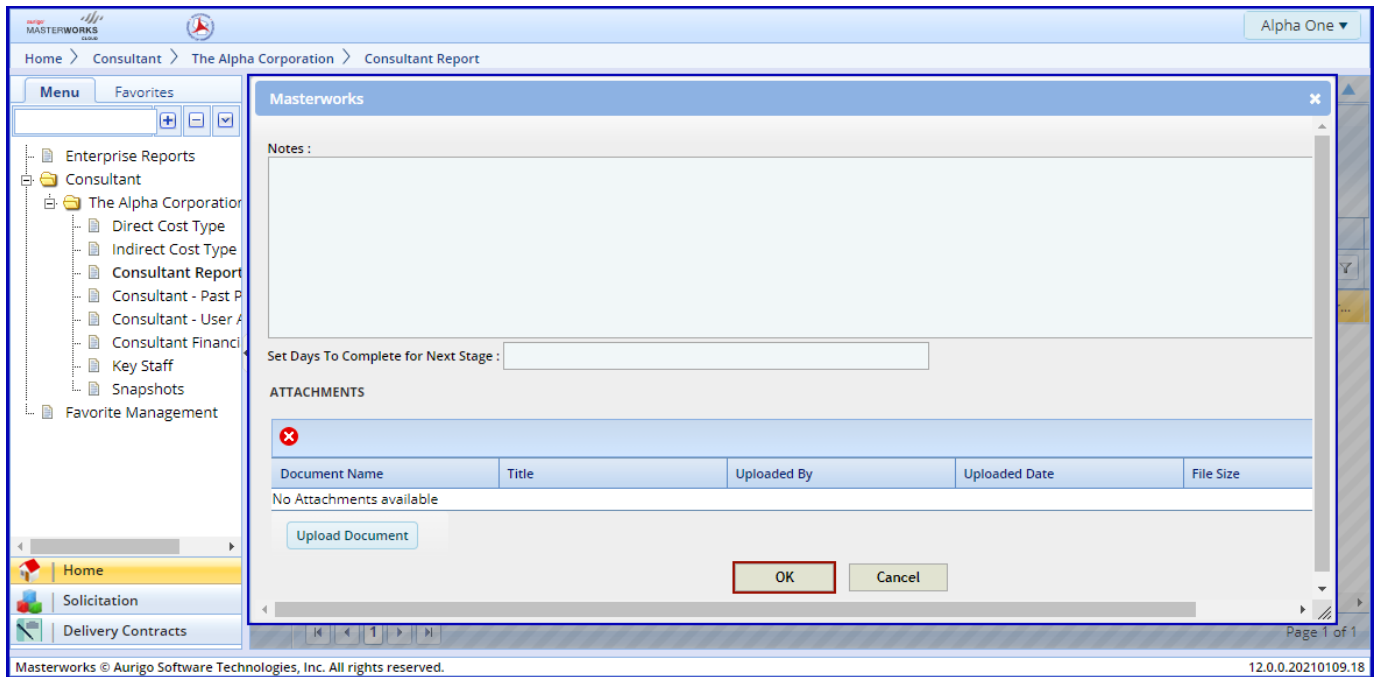

The report may now be updated. Click **Save** to complete changes later and/or Resubmit from the list page. To submit from the form, click **Resubmit**.

Complete a Consultant Report

Click **OK** on the acknowledgement screen.

The form has now been resubmitted to WisDOT.

2.11 Review Previous Submissions

Previous submissions of the Consultant may be reviewed by click on the Snapshots link. Select the report using the checkbox ✓ and click **View.**