

State of Maryland
Interagency Commission on School
Construction

Business Management System
Contract Approval Process
Process User Guide



Interagency Commission on School Construction
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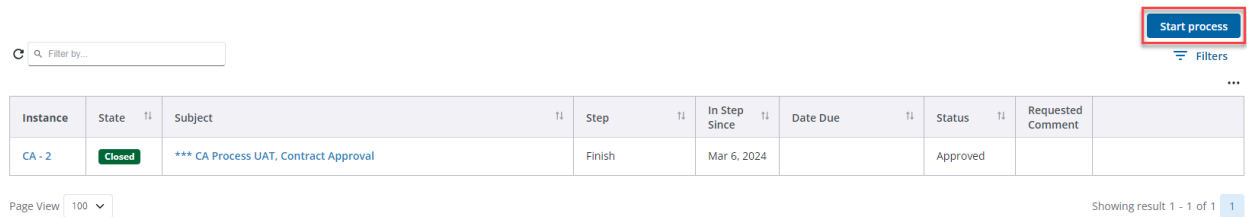
This guide is available for download at iac.mdschoolconstruction.org

Contract Approval Process

Starting the Process

This process is used for the submission and review of construction contracts for school construction projects. To start this process, you must choose the correct project where the contract will reside. Once you are within that project, please use these steps to start the process.

- In the Project Menu on the left side of the page, select the “Processes” tab.
- In the “Project Processes” home screen, click on the “Start process” button which is situated in the top right corner of the page.

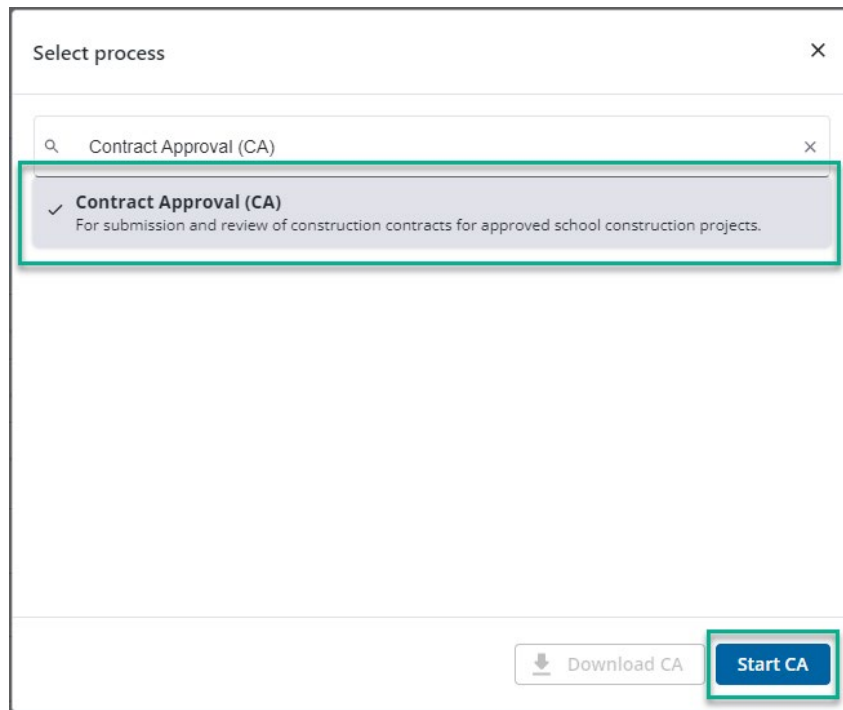


The screenshot shows a web interface for 'Project Processes'. At the top right, there is a blue button labeled 'Start process' with a white border. Below it is a 'Filters' link. A search bar is located at the top left. The main content is a table with the following data:

Instance	State	Subject	Step	In Step Since	Date Due	Status	Requested Comment
CA - 2	Closed	*** CA Process UAT. Contract Approval	Finish	Mar 6, 2024		Approved	

At the bottom left, there is a 'Page View' dropdown set to '100'. At the bottom right, it says 'Showing result 1 - 1 of 1'.

- Once you have clicked the “Start Process” button, you will be presented with a list of processes that you have access to start or submit.
- Choose the process by clicking on the name.



The screenshot shows a 'Select process' dialog box. It has a search bar at the top with the text 'Contract Approval (CA)'. Below the search bar, there is a list of process options. The first option is 'Contract Approval (CA)' with a checkmark and a description: 'For submission and review of construction contracts for approved school construction projects.' This option is highlighted with a green border. At the bottom right of the dialog box, there is a 'Download CA' button and a 'Start CA' button, which is also highlighted with a green border.

- You will then be presented with the initial step of the process. Fill out all pertinent information, specifically whether or not the contract is a CMA contract or not.

Contract Approval (CA)

Start Process Print Check Spelling Submit Save Draft Cancel

Project: Mickey Test Project
Project Number: dgdghh
Process: Contract Approval

Details Documents (2) Attached Processes (2) Attached Forms (2)

Expand All Collapse All

Data

Is this a CMA Contract? Yes No

In order to submit this Contract Award Request, you must please choose a "Commitment Type", as well as a "Company"
For the "Commitment Type", please choose the option that best describes the type of contact you are creating
For the Company, if this is a CMA contract, then please choose the company named CMA Vendor. You can do this by typing CMA in the dropdown, and then just highlight the name.
If this is not a CMA contract, then please choose the correct Vendor or Contractor.
Please disregard everything else as it only pertains to the MD IAC.
Thank you,

Commitment Details

Status: Draft
Master Commitment: Please select a master commitment...
Commitment Type: Select one...
Commitment Control: Controlled By Commitment Item
Company: cma
Contact: Select a contact...

Unit Cost Options: Lump Sum Amount
Company Number:

Commitment Others

Commitment Date:
Scope of work:
Retainage Percent: 0.00

Notice to Proceed Date:
Retainage amount: Support manual entry

- You will be asked to choose a "Commitment Type" as well as the contractor/vendor that this contract will be awarded to. If this is a CMA contract, please choose "CMA Vendor" within the list of companies.
- You are able to search companies by typing the first few letters of the company into the dropdown, and it will bring you automatically to that company.

Commitment Details

Status: Draft
Master Commitment: Please select a master commitment...
Commitment Type: Select one...
Commitment Control: Controlled By Commitment Item
Company: cma
Contact: CMA Vendor

Unit Cost Options: Lump Sum Amount
Company Number:

- Once finished, you can submit the process using the "Submit" button which will be in the top right corner.
- If needed during the filling out of the process fields, you can save your work by clicking on the "Save" button in the top right corner. This will put the process in a "Draft" status. While in "Draft" status your work will only be available to you.
- After submitting, the request will be routed to the IAC for review and approval. Please see the description of the workflow below.

Submitting Contract Information

- Once you have initially submitted the process, it will go through two possible decision points. Both decision points are automated steps that will not require you to take action.. The first decision point will be to determine if the contract will be funded by local funds

only. If the contract is funded by local funds, the automation will route the process to a second step for the process initiation to add the contract information. If it is not locally funded, then the process will be routed to the second conditional step.

- The second conditional will be based upon what type of contract it is (either CMA or non CMA). Depending on the contract type, the request will be routed to the correct layout so the data fields that you will see will be specific to the contract type. At this point, the request will still be in your court, and you will need to fill out the remaining information for the contract approval. The next step will not automatically appear for you. You will have to go back to your home screen and reopen the process.

Contract Approval (CA) - 20

Delete Instance Workflow Override All Fields View

Submit Take Action Check Spelling Print Copy Delegate Save Cancel

Project: Washington/Governor/ Mickey Memorial/ Overpass/ Project (L0144556699882211)	Project Number: CFS-1234
Process Document: CA - 20	Overall Due Date:
Show History Current Actors	Step Due Date:
Current Workflow Step: Non CMA Contract Show Workflow Diagram	
Subject: Washington/Governor/ Mickey Memorial/ Overpass/ Project (L0144556699882211), Contract Approval, 2365	
Status: Submitted	

Details Comments (0) Documents (0) Attached Processes (0) Attached Forms (0) Attached To (0)

Expand All | Collapse All

Contract Award Information

Fill in all information that would have been in the old 303.3 form. If any data fields are not needed, please enter \$0.

* Total State Allocation: <input type="text"/>	* New Sq. Ft: <input type="text"/>
* Local Funds: <input type="text"/>	* Reno Sq. Ft: <input type="text"/>
Other*: <input type="text"/>	* Demo Sq. Ft: <input type="text"/>
* Date of bid opening: <input type="text"/>	* Method of Procurement: -- Please select an option --
* Detailed Scope: <div style="border: 1px solid gray; padding: 2px;">"Segue UI", A, - 12px - B / I U A Test</div>	* Do you anticipate additional contracts for the project?: <input type="radio"/> Yes <input type="radio"/> No
* Total Contract Amount: 150.00	

MBE Goal(s) for project

* Overall MBE Goal Percentage: <input type="text"/>	* Does contractor meet or exceed these goals?: <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
* African American Goal Percentage: <input type="text"/>	* If no, does contractor request a partial or full waiver?: <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
* Asian Goal (Percentage): <input type="text"/>	* Does LEA approve this contractor even if goals are not met?: <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
* Women Goal (Percentage): <input type="text"/>	
* Hispanic Goal %: <input type="text"/>	

Proposed Non CMA Contract Award

Show Filter | Select All | Row Height: 1X

Download Template Import Delete

This information is required. Please add lines to the table by filling out each data field and then selecting the "Add" button in the lower right hand corner of the table.

#	Contract Cost Category	STATE	LOCAL	Other	Other Description
Grand Totals (0 Items)		0.00	0.00	0.00	

Add New Item for Proposed Non CMA Contract Award

Contract Cost Category	Please select...
STATE	<input type="text"/>
LOCAL	<input type="text"/>
Other	<input type="text"/>
Other Description	<input type="text"/>

Clear Add

Bid Grid

Show Filter | Select All | Row Height: 1X

Download Template Import Delete

This information is required. Recommendation is for the acceptance of the Base Bid and alternates (list alternates in boxes). Please make sure to include the Base Bid within the table.

#	Bid	Bid Amount	Description
Grand Totals (0 Items)		0.00	

Add New Item for Bid Grid

* Bid: Please select...
 * Bid Amount:
 * Description:

Clear Add

Ineligibles

* Are there ineligibles? Yes No

Filter | Select All | Row Height: 1X | Download Template | Import | Delete

#	Ineligibles Item	Ineligible Amount
Grand Totals (0 Items)		
		0.00

Add New Item for Ineligibles

* Ineligibles Item:
 * Ineligible Amount:

Clear Add

Required Attachments (Uploads)

Please upload all applicable attachments to the appropriate upload field below. Any additional supporting documents may be attached to the documents tab of this process. Incomplete submissions will be returned to the LEA.

Draft Contract:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
* Proposal/Quote:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
Bid Tabulation:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
Bid package submitted by low bidder:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
Bid Specifications:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
Bid Drawings:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
Bid Bond:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
Certificate of Liability/Insurance:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
* BOE Approval:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
BOE approval of agenda item:	<input type="text"/>			
MBE Documentation Packet:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
Prevailing Wage Documentation if project is over \$250K:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
CD Review/Response Letter if project is over \$1M:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
Addendum 1:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
Addendum 2:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
Addendum 3:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
Addendum 4:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
Addendum 5:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
Addendum 6:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
Addendum 7:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
Addendum 8:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
Addendum 9:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
Addendum 10:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>
Other:	<input type="text"/>	or	<input type="button" value="Browse Computer"/>	<input type="button" value="Browse e-Builder"/>

Submit | Take Action | Check Spelling | Print | Copy | Delegate | Save | Cancel

- Now that you have completed the request, and filled in all required information, you can then submit the request for review. To submit the request, you will have to use the **“Take Action”** dropdown option which is different from the initial request submission. This can be found in the top right corner of the screen.

Contract Approval (CA) - 20

Delete Instance | Workflow Override | All Fields View

Submit | Take Action | Check Spelling | Print | Copy | Delegate | Save | Cancel

Project:	Washington/Governor/ Mickey Memorial/ Overpass/ Project (0144556699882211)	Project Number:	CF017224
Process Document:	CA - 20	Overall Due Date:	
Current Workflow Step:	Show History Current Actors Now CMA Contract: Show Workflow Diagram	Step Due Date:	
Subject:	Washington/Governor/ Mickey Memorial/ Overpass/ Project (0144556699882211), Contract Approval - 2365		
Status:	Submitted		

- **IAC Financial Check:** In this step the MD IAC CFO will review the contract for final approval. Once reviewed, the IAC CFO will route the process forward. Once approved by the CFO, the process will go to the Finish Step with an approved status.

CMA Contract Submitted By LEA

- **CMA Contract:** The process will be routed back to the process initiator so that they can fill in all of the requested information for the contract.
- **LEA Submission (Conditional Step):** This is another decision point that checks to see if the process was submitted by the LEA Facility Planner, or by another user role.
- **Finance Completeness Check CMA:** The IAC Finance Administrator will check the submission for completeness. If there are any questions or concerns, the IAC Administrator can then send it back to the process initiator for revisions.
- **CPM Review CMA:** The Capital Projects Manager (CPM) will review the application. If there are any questions or revision required, the CPM will route it back to the process initiator.
- **Contract Review CMA:** The IAC Finance Administrator will then review the contract. If approved, the administrator will route the process forward.
- **Funding Programs Manager Review CMA:** The IAC Funding Programs Manager will review the submission, and either submit it forward, or send it back to the IAC Finance Administrator for revision.
- **CFO Review CMA:** The IAC CFO will review the submission, and then approve it. If there are revisions required, it will be sent back to the IAC Finance Administrator for revision.

Non CMA Contract Submitted By the LEA

- **If this is a Not a CMA Contract:** The process will still be routed back to the process initiator so that they can fill in all of the requested information for the contract. The data fields will be different for a CMA contract. Then the process will be routed onward as shown above.
- **Finance Completeness Check Non CMA:** The IAC Finance Administrator, will check the submission for completeness. If there are any questions or concerns, the IAC Administrator can then send it back to the process initiator for revisions.
- **CPM Review Non CMA:** The Capital Projects Manager (CPM) will review the application. If there are any questions or revision required, the CPM will route it back to the process initiator.
- **Contract Review Non CMA:** The IAC Finance Administrator will then review the contract. If approved, the Administrator will route the process forward.
- **Funding Programs Manager Review Non CMA:** The IAC Funding Programs Manager will review the submission, and either submit it forward, or send it back to the IAC Finance Administrator for revision.

- **CFO Review Non CMA:** The IAC CFO will review the submission, and then approve it. If there are revisions required, it will be sent back to the IAC Finance Administrator for revision.

Final Steps For all Contracts

- **Contact Under \$100K (Conditional Step):** This is an automated conditional step. If the contract is over 100K, then the process will be routed to the IAC Communications Coordinator step for review. If the contract is under 100K, then the process will route to the "Reversion Required" conditional step.
- **Reversion Required (Conditional Step):** This is a conditional automated step that will check to see if there are any "Reverted Funds" for this contract. If there are no reverted funds, then the process will be routed to the "Bundled Contract" step. If there is a Reversion Required, then the process will be routed to the IAC Communications Coordinator step.
- **Bundled Contract (Conditional Step):** This is a conditional automated step that will check if the contract will be bundled with another contact. If it is not bundled, then the process will be routed to the "Under \$100K Notification" step which will be explained below. If it is a bundled contact, then the process will be routed to the "Bundled Under \$100K" Automated step.
- **Under \$100K Notification (Automation Step):** This is an automated step that will send the process initiator an approval notification.
- **Communications Coordinator Review:** The IAC Communications Coordinator will make a final review of the contract. Once the review is complete, then the process will be routed to the IAC Approval step.
- **IAC Approval:** The IAC Administrator will then have final review, and will update the correct information into the cost portion of the project. This updated information will be visible to the process initiator. If for some reason the IAC Meeting Date must be changed, then the IAC admin will route the process to the IAC Finance Admin to update.
- **Revise IAC Meeting Date:** This step will be taken by the IAC Finance Admin. They will update the meeting information and route the process back to the IAC Admin to review.
- **IAC Approval Notification (Automation Step):** This is an automated step that will send the process initiator the final approval notification along with all corresponding documents.
- **Final Executed Contract:** The process initiator will be able to review all final data, and will be tasked with uploading all final contract documents.
- **IAC Review of Final Documents:** The IAC Finance Administrator will review all contract documents, and then route the process to the finish step. If the administrator has questions, they are able to route the process back to the initiator for revisions or comments.

Final Comments

- At any point the process initiator and all project participants will be able to review this process. This process will be available for review during the workflow steps, as well as after the completion.
- At any point, all project participants will be able to print this process to either a hard paper copy, or a pdf.