

# Quick Reference Guide

Last Modified: 09/23/2008 08:02:36 AM  
Reviewed for Version:

## Contract Activation Checklist

Checklist for Contract Activation:

The following items will need to be done before charging time against a contract:

Construction Division:

- ✓ Generate Estimate Days have 1 and 15
- ✓ Contract Limit Amount will remain at zero
- ✓ Assign Division
- ✓ Assign Residency
- ✓ Set Variance Pct @ 20%
- ✓ Check to make sure funding box is filled in
- ✓ Bid Days match contract
- ✓ Bid Amount matches green contract
- ✓ Spec Year is Correct
- ✓ PCN or Job Piece Number is correct
- ✓ Time Charges are correct (Calendar Day Option will not be used)
- ✓ Wage Rates are assigned (If Applicable)
- ✓ Oversight is checked (If applicable)
- ✓ Generic Field labeled "Comptroller Contract Number" is entered
- ✓ Generic Field labeled "Comptroller Account Number" is entered
- ✓ Generic Field labeled "Design Engineer's FEI No." is entered.
- ✓ Asst. Resident Engineer/Manager is assigned to the Project Manager Field
- ✓ Resident Engineer/Manager is assigned to the Project Engineer Field
- ✓ Division Engineer and Asst. Div. Engr. are notified in the Distribution List showing the contract has been activated.
- ✓ Description matches contract
- ✓ Contract Type is selected correctly
- ✓ Work Type is filled in
- ✓ County is correct
- ✓ Contract Limit Pct will remain at zero
- ✓ Liquidated Damages match contract
- ✓ Leave Price Ajmnt. Ind. blank
- ✓ Retain age will be left blank
- ✓ Critical Dates that need to be filled in to activate:
  - Letting Date
  - Award Date
  - Execution Date
- ✓ Notice to Proceed Date (NOTE: This date will be entered when contract is changed to active)
- ✓ Prime Contractor is correct
- ✓ Prime Contractor's address is correct since some contractors have two different addresses. If you get an error message when trying to save this address, click on the address until it shows up and then close and click on save button.
- ✓ Bonding and Insurance Companies are loaded

- ✓ Prime Associate is added which is the representative who signs the contract
- ✓ Max Subcontract Percent is set at 50% unless special provision is included in contract to change to 70%
- ✓ D.B.E. Goal is set at correct percent according to green contract
- ✓ D.B.E. Goal value is correct
- ✓ Milestones are added (If applicable)
- ✓ Counties are all inclusive with one as primary county
- ✓ Pay Plan Quantity Items have a check in the box (If Applicable)
- ✓ Major Items have a check in the appropriate box (If Applicable)
- ✓ Add the "Notice to Proceed Date" in Critical Dates
- ✓ Go back to the Contracts Window and change contract from pending to active

The Construction Residency will do the following:

- ✓ Resident assigns access to contract for residency personnel
- ✓ Asst. Constr. Engr. assigns access to contract for division personnel
- ✓ Set up pre-work conference and load minutes into SiteManager
- ✓ Assign a Work Begin Date in the Key Date Window and notify Construction Division on the Distribution List
- ✓ Check Key Dates or Checklist Event dates and make sure to delete any that are not applicable to each contract. You may want to add some that are contract specific.
- ✓ Residency Auditor will need to associate DWR Templates to pay items
- ✓ Attach any spreadsheets, forms, etc. needed for contract

Note on Last Modified Date:

This QRG was not revised. The Last modified date reflects a change to the design of the SSS database system.