

CMS Training

Consultant Contract Doc Prep Module

2010 -- 2011

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www.udot.utah.gov/go/epm

The Golden Rules of CMS Consultant Doc Prep

Use “Tab” or “Enter” to navigate from entry fields

Bold indicates double click (like a web link)

All activities **MUST** have duration

All activities **MUST** have at least one employee

(Recommendation – include labor hours for the employee overseeing a sub-consultant in the activity rather than “passing it through” to the sub-consultant)

All employees **MUST** have at least one labor hour

Sub-consultants must be assigned activities in order to enter any data for their responsibilities

3. In order to establish a contract with UDOT, the Consultant Administrator will need to set up certain information for your company such as your Other Direct Costs [ODC] and employee information.
 - a. Click on the Consultant Menu and Select the 930 Consultant Screen.

4. Verify that your address information is correct or make any necessary updates and click Save.
 - a. If you need to add another address, first click Add and then fill out the information under the Address tab and then click Save.
 - b. The name listed under the Contract Contact is the primary contact for all or your company's contracts. This person also serves as the primary contact for ePM security administration within your company.

Oracle Developer Forms Runtime - Web

ePM Home Federal Aid Agreement Contract Consultant Table Maintenance Menu Reports Old CMS Help Window **ORACLE**

ePM930 Consultant (v 1.0) 06-DEC-2010 09:58:47

Consultant

Federal ID: 999999444 Firm Name: PRIME ENGINEERING, INC Legal Status: FOR-PROFIT CORPORATION Active: Save Delete Print Re...

Annual Cost of Living Adjustment Date: 01/01/2011 Annual Cost of Living Adjustment Percentage: 3.00

Financial Contact Info **Contract Contact Info**

Salutation: MS First Name: RAE Last Name: SANCHEZ Salutation: MS First Name: RAE Last Name: SANCHEZ

Phone: (801) 123-456; Fax: (801) 123-456; Phone: (801) 123-456; Fax: (801) 123-456;

Email: RAELEEN@UTAH.GOV Email: RAELEEN@UTAH.GOV

Address Financial Screening Correspondence ODC Category Insurance Discipline Employee ODC Item Security

Description: _____ Primary: Finance: Save Delete Add

Line 1: _____

Line 2: _____

City: _____ State: _____ Zip: _____

Description	Primary	Finance	Line 1	City	State	Zip
PRIMARY	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1234 MAIN ST	ANYTOWN	US	00123
ST GEORGE OFFIC	<input type="checkbox"/>	<input type="checkbox"/>	1234 MAIN STREET	ST GEORGE	UT	84444

Record: 1/1 ... <OSC>

5. To view your financial screening information, click on the Financial Screening Tab. It is your [Consultant Administrator] responsibility to provide active financial screenings to UDOT Consultant Services.
 - a. Consultants are approved to work on Lump Sum, Cost Plus Fixed Fee or Unit Price Contracts if the corresponding boxes have been checked by UDOT Consultant Services in the Financial Screening process.
 - b. Types of contracts are determined during the financial screening process based on information provided by Accounting staff.

Oracle Developer Forms Runtime - Web

ePM Home Federal Aid Agreement Contract Consultant Table Maintenance Menu Reports Old CMS Help Window

ePM930 Consultant (v 1.0) 09-DEC-2010 11:29:17

Consultant

Federal ID: 999999444 Firm Name: PRIME ENGINEERING, INC Legal Status: FOR PROFIT CORPORATION Active: Y

Annual Cost of Living Adjustment Date: 01/01/2011 Annual Cost of Living Adjustment Percentage: 3.00

Financial Contact Info: Salutation: MS First Name: RAE Last Name: SANCHEZ Contract Contact Info: Salutation: MS First Name: RAE Last Name: SANCHEZ

Phone: (801) 123-4567 Fax: (801) 123-4567 Email: RAELEEN@UTAH.GOV

Address Financial Screening Correspondence ODC Category Insurance Discipline Employee ODC Item Security

Received Date: Review Date: Effective Date: Expiration Date:

Fringe Overhead: G&A Overhead: Total Overhead: FHWA Cost Certification:

Negotiated Rates: CPA OK: CPA Overhead: Lump Sum: Cost Plus: Unit Price: DBE:

Audit Date: Audit Company Name:

Received Date	Review Date	Effective Date	Expiration Date	Fringe Overhead	G&A Overhead	Total Overhead	Cost Cert.	Neg. Rates	CPA OK	CPA OH	Lump Sum	Cost Plus	Unit Price	DBE
10/01/2010	10/01/2010	10/01/2010	10/01/2011	100.00	50.00	150.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Record: 1/1 <OSC>

- To view any correspondence notes between you [Consultant Administrator] and UDOT Consultant Services regarding your Financial Screening, click on the Correspondence tab. Information is specific to Financial Screening periods.

The screenshot shows the Oracle Developer Forms Runtime - Web interface for the Consultant form. The form is titled "Consultant" and displays various fields for a consultant named PRIME ENGINEERING, INC. The "Correspondence" tab is selected, showing a table with columns for "Date" and "Comment". The table is currently empty. The record count at the bottom is "Record: 1/1".

- View Other Direct Cost [ODC] Categories that UDOT Consultant Services has approved for the Consultant during the Financial Screening process. These will be established for each Financial Screening period.

The screenshot shows the Oracle Developer Forms Runtime - Web interface for the Consultant form. The form is titled "Consultant" and displays various fields for a consultant named PRIME ENGINEERING, INC. The "ODC Category" tab is selected, showing a table with columns for "ODC Category" and "ODC Category Type". The table contains the following data:

ODC Category	ODC Category Type
CONTRACTED LABOR	Direct
MILEAGE REIMBURSEMENT	Direct
PER DIEM	Direct
PHOTOCOPIES / PRINTING	Direct
POSTAGE	Direct
TRAVEL EXPENSES	Direct

The record count at the bottom is "Record: 1/7".

- In order to be eligible to complete your contract, Consultants need to provide current insurance certificates to UDOT Consultant Services. To verify that Consultant Services has your most recent insurance information, click on the Insurance Tab.

Oracle Developer Forms Runtime - Web

ePM Home Federal Aid Agreement Contract Consultant Table Maintenance Menu Reports Old CMS Help Window

ORACLE

ePM930 Consultant (v 1.0) 06-DEC-2010 09:58:47

Consultant

Federal ID: 999999444 Firm Name: PRIME ENGINEERING, INC. Legal Status: FOR-PROFIT-CORPORATION Active: Y

Annual Cost of Living Adjustment Date: 01/01/2011 Annual Cost of Living Adjustment Percentage: 3.00

Financial Contact Info: Salutation: MS, First Name: RAE, Last Name: SANCHEZ, Phone: (801) 123-456, Fax: (801) 123-456, Email: RAELEEN@UTAH.GOV

Contract Contact Info: Salutation: MS, First Name: RAE, Last Name: SANCHEZ, Phone: (801) 123-456, Fax: (801) 123-456, Email: RAELEEN@UTAH.GOV

Address Financial Screening Correspondence ODC Category Insurance Discipline Employee ODC Item Security

Insurance Waived Expiration Date Insurance Carrier Policy Number

Insurance	Waived	Expiration Date	Insurance Carrier	Policy Number
AUTOMOBILE LIABILITY	N	10/26/2011	AMERICAN CASUALTY CO.	AB12345678
GENERAL LIABILITY	N	10/26/2011	HARTFORD CASUALTY INSURANCE C	GL23456789
PROFESSIONAL LIABILITY	N	10/26/2011	TRAVLERS COMMERCIAL INS. CO	PL5555345654
WORKERS COMPENSATION	N	10/26/2011	WORKERS COMPENSATION FUND	608915

Record: 1/4 <OSC>

- View the Disciplines that the Consultant has qualified for, click on the Discipline Tab. Disciplines will be unique to Pool Periods.

Oracle Developer Forms Runtime - Web

ePM Home Federal Aid Agreement Contract Consultant Table Maintenance Menu Reports Old CMS Help Window

ORACLE

ePM930 Consultant (v 1.0) 06-DEC-2010 09:58:47

Consultant

Federal ID: 999999444 Firm Name: PRIME ENGINEERING, INC. Legal Status: FOR-PROFIT-CORPORATION Active: Y

Annual Cost of Living Adjustment Date: 01/01/2011 Annual Cost of Living Adjustment Percentage: 3.00

Financial Contact Info: Salutation: MS, First Name: RAE, Last Name: SANCHEZ, Phone: (801) 123-456, Fax: (801) 123-456, Email: RAELEEN@UTAH.GOV

Contract Contact Info: Salutation: MS, First Name: RAE, Last Name: SANCHEZ, Phone: (801) 123-456, Fax: (801) 123-456, Email: RAELEEN@UTAH.GOV

Address Financial Screening Correspondence ODC Category Insurance Discipline Employee ODC Item Security

Pool Period: 2010-2013 GE / LG

Discipline	Active
PRECONSTRUCTION ENGINEERING	Y

Record: 1/1 <OSC>

10. Click on the Employee Tab to add employees from your Staffing Plan.

Oracle Developer Forms Runtime - Web

ePM Home Federal Aid Agreement Contract Consultant Table Maintenance Menu Reports Old CMS Help Window ORACLE

ePM930 Consultant (v 1.0) 06-DEC-2010 09:58:47

Consultant

Federal ID: 999999444 Firm Name: PRIME ENGINEERING, INC Legal Status: FOR-PROFIT-CORPORATION Active: Save Delete Print Re...

Annual Cost of Living Adjustment Date: 01/01/2011 Annual Cost of Living Adjustment Percentage: 3.00

Financial Contact Info: Salutation: MS First Name: RAE Last Name: SANCHEZ Phone: (801) 123-456 Fax: (801) 123-456 Email: RAELEEN@UTAH.GOV

Contract Contact Info: Salutation: MS First Name: RAE Last Name: SANCHEZ Phone: (801) 123-456 Fax: (801) 123-456 Email: RAELEEN@UTAH.GOV

Address Financial Screening Correspondence ODC Category Insurance Discipline Employee ODC Item Security

UDOT Pay Category: [] Group: First Name: [] Last Name: [] Save Delete Add

Employee Job Title: [] Education/Certification Level: [] License Type: [] License Number: [] License Issuing State: [] Allow Multiple Wage Rates on a Contract: Actual Wage Rate: [] Unit Price Rate: []

Employee Name	Company Job Title	UDOT Pay Category	Active
JEFFERSON, THOMAS	LEGAL ADVISOR, QC/QA	Lawyer	<input checked="" type="checkbox"/>
KENNEDY, JACK	PROJECT MANAGER	Engr	<input checked="" type="checkbox"/>
LINCOLN, ABE	STRUCTURAL LEAD	EngSpecIst	<input checked="" type="checkbox"/>
MAIN OFFICE CADD TECHS	CADD TECH	CADD Tech	<input checked="" type="checkbox"/>
REAGAN, RONALD	STRUCTURES LEAD	Engr	<input checked="" type="checkbox"/>
ROOSEVELT, TERRY	ENGINEER IN TRAINING	Engr	<input checked="" type="checkbox"/>

Record: 1/7 <OSC>

Note – Pay Category is used by the UDOT PM to calculate labor costs for a category of employees on the ICE. Tying your employees to a UDOT Pay Category assists the UDOT PM in managing his project budget. Employee Job Title is the working job classification your firm uses for employees. In the contract document section, you will identify the employee’s role as the Contract Job Title.

For example, John Doe is the owner of a company. The UDOT Pay Category may be “Principle Engineer”. His Employee Job Title may be “Owner” or “Principle Engineer” on his employee record; his Contract Job Title for one contract may be Project Manager or QC/QA Manager, and on another contract, he may be the Structural Lead.

You can create groups of employees for non-critical positions for use on unit price contracts. This may be a group of CADD technicians or administrative staff, using an average for rates of pay. You may not create a group for licensed professionals.

11. Add the following employees by clicking 'Add' and selecting a pay category similar to their job title within your organization. Complete all necessary fields for each employee and Save. License information is required for all licensed professionals.

- a. Engineer (Pay Category) - Jack Kennedy, P.E. - Project Manager - BS Civil Engineering - License Number 11221963 - \$35.45 per hour.
- b. Engineer (Pay Category), Ronald Reagan, Structures Lead, BS Civil Engineering, PE, 11041980, UT, \$49.77 per hour.



NOTE: CMS will calculate a unit price rate of pay by loading the actual wage by the OH rate and a fixed fee of 10.5%. This can be overridden by Administrative staff, by inserting the firm's standard loaded unit rate for each employee.

In order for your Consultant PM to identify Other Direct Cost Items for this specific Contract, you need to make them available under the ODC Item Tab. If the ODC Category you need is not available, contact the Financial Screener with UDOT Consultant Services.

12. Add the following ODC Items from your Cost Proposal
 - a. Other - Testing - Each - \$225
 - b. Contract Labor - Each
 - c. Mileage Reimbursement - Personal Mileage Reimbursement - Mile - \$.50

Oracle Developer Forms Runtime - Web

ePM Home Federal Aid Agreement Contract Consultant Table Maintenance Menu Reports Old CMS Help Window **ORACLE**

ePM930 Consultant (v 1.0) 06-DEC-2010 09:58:47

Consultant

Federal ID: 999999444 Firm Name: PRIME ENGINEERING, INC Legal Status: FOR PROFIT CORPORATION Active: Y

Annual Cost of Living Adjustment Date: 01/01/2011 Annual Cost of Living Adjustment Percentage: 3.00

Financial Contact Info: Salutation: MS First Name: RAE Last Name: SANCHEZ Phone: (801) 123-456 Fax: (801) 123-456 Email: RAELEEN@UTAH.GOV

Contract Contact Info: Salutation: MS First Name: RAE Last Name: SANCHEZ Phone: (801) 123-456 Fax: (801) 123-456 Email: RAELEEN@UTAH.GOV

Address Financial Screening Correspondence **ODC Category** Insurance Discipline Employee ODC Item Security

Financial Screening Dates: Received Date: 10/01/2010 Review Date: 10/01/2010 Effective Date: 10/01/2010 Expiration Date: 10/01/2011

ODC Category	Item Description	UOM	Item Cost
MILEAGE REIMBURSEMENT	PERSONAL MILEAGE REIMBURSEMENT	MILE	.500
CONTRACTED LABOR	CONTRACTED LABOR	EACH	.000
MILEAGE REIMBURSEMENT	PERSONAL MILEAGE REIMBURSEMENT	MILE	.500
PER DIEM	LODGING CONUS	DAY	79.000
PER DIEM	PER DIEM CONUS	DAY	39.000
PHOTOCOPIES / PRINTING	11 X 17 B&W	EACH	.240
PHOTOCOPIES / PRINTING	11 X 17 COLOR	EACH	.450

Record: 1/1 <OSC>

13. When you are logged in as an Administrator, you will have access to the Security Tab under the Consultant 930 Screen. Only those individuals with administrator rights will see the security tab. Consultant Services and UDOT PM's do not have access to this tab to ensure complete control by the Consultant over who has access to their data. This screen provides three functions:

- a. The consultant manages ePM / CMS security for their employees. Consultants will give new employees access and inactivate employees when they terminate with the firm.
- b. "Allow UDOT Consultant Services to act as Prime." The consultant can give access to UDOT Consultant Services staff. This function enables CS to see what you see when completing contract documents in a support function when your firm needs assistance. This flag can be open or closed as needed.
- c. "Restrict Other Consultants from doing Document Preparation." The consultant can give access to other consultants. This function enables smaller firms to allow a prime consultant to enter contract information in their behalf. It does not allow other consultant firms to address any areas of the 930 screen (security, employees, and other direct cost items). Note – any consultant adding your firm as a sub-consultant to a contract project team will have access to see employee and other direct cost information. **This field is all or nothing, either no consultants may have any access to your information or all consultants have access to see your information as a sub-consultant.**

Oracle Developer Forms Runtime - Web

ePM Home Federal Aid Agreement Contract Consultant Table Maintenance Menu Reports Old CMS Help Window **ORACLE**

ePM930 Consultant (v 1.0) 08-DEC-2010 15:10:36

Consultant

Federal ID: 999999444 Firm Name: PRIME ENGINEERING, INC Legal Status: FOR PROFIT CORPORATION Active: Save Delete Print Report

Annual Cost of Living Adjustment Date: 01/01/2011 Annual Cost of Living Adjustment Percentage: 3.00

Financial Contact Info: Salutation: MS First Name: RAE Last Name: SANCHEZ Contract Contact Info: Salutation: MS First Name: RAE Last Name: SANCHEZ

Phone: (801) 123-4567 Fax: (801) 123-4567 Phone: (801) 123-4567 Fax: (801) 123-4567

Email: RAELEEN@UTAH.GOV Email: RAELEEN@UTAH.GOV

Address Financial Screening Correspondence ODC Category Insurance Discipline Employee ODC Item Security

Employee Names: PAN, PETER (selected), TINKER BELL, [Empty], [Empty], [Empty], [Empty]

Available Profiles for Selected Employee:

- 61 - CMS VIEW ACCESS TO DATA (CONSULTANTS)
- 67 - EPM VIEW ACCESS TO DATA (CONSULTANTS)
- 68 - EPM LIMITED ACCESS TO DATA (CONSULTANTS)
- 69 - EPM PM ACCESS TO DATA (CONSULTANTS)

Applied Profiles for Selected Employee:

- 63 - CMS PM ACCESS TO DATA (CONSULTANTS)
- 64 - CMS ADMIN ACCESS TO DATA (CONSULTANTS)

(Double-click available or applied profiles to activate or deactivate.)

Allow UDOT Consultant Services to act as Prime: Restrict Other Consultant from doing Document Preparation:

Record: 1/2 <OSC>

To add an ePM account, consultant employees need to fill out an access request form online from www.udot.utah.gov/go/ePM. Click on Access Request – Outside Customer

ePM Staff will then create a login account for an employee and associate them with the company they claim to work for.

The employee has a login, but no access to ePM until the Consultant gives them access.

The employee will show up on the employee list on the Security Tab with no security access.

In order for them to be able to access anything in ePM, you [as the consultant security administrator] must first grant them security access.

If this person does not work for you, simply delete them by clicking “Remove Employee”. This will make the login “inactive” until UDOT associates the login with another consultant.

If this person does work for you, you can grant them the appropriate security access by double clicking on the security profiles in the left hand box. Applied security profiles will then show up in the right hand box.

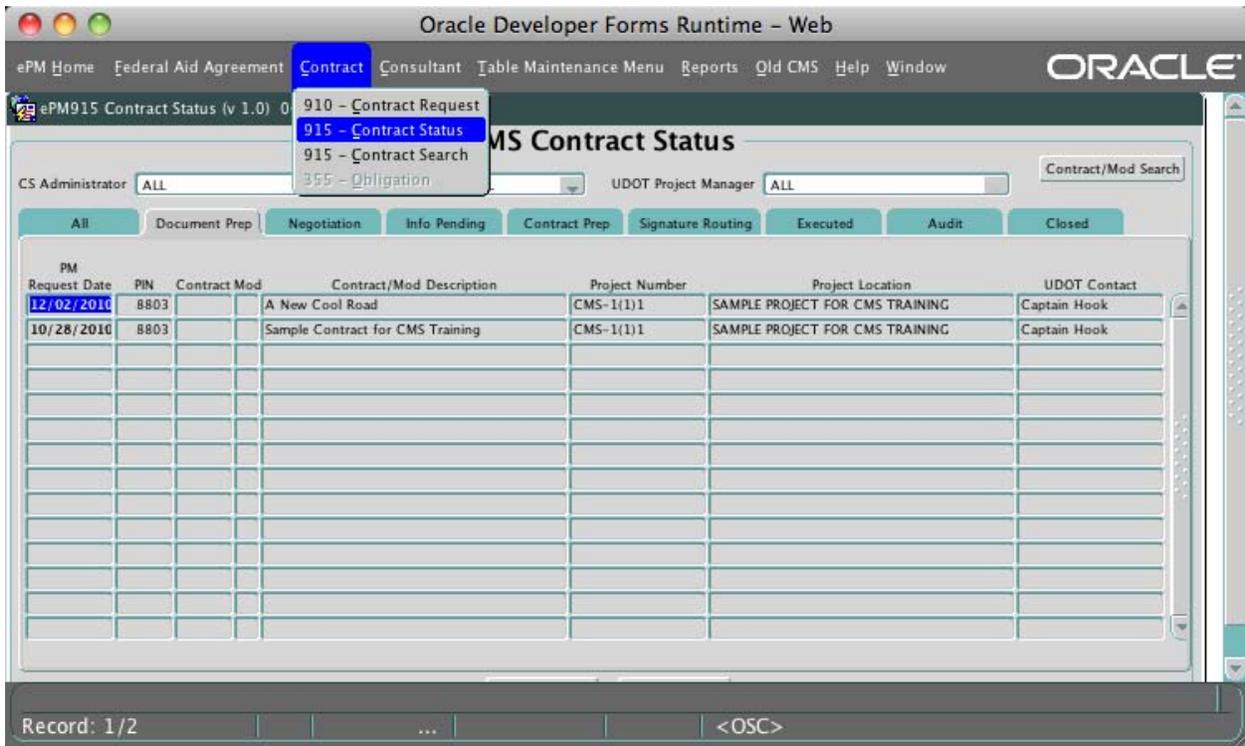
Some of these security access profiles have read only capabilities while others have read / write capabilities.

Security accesses are:

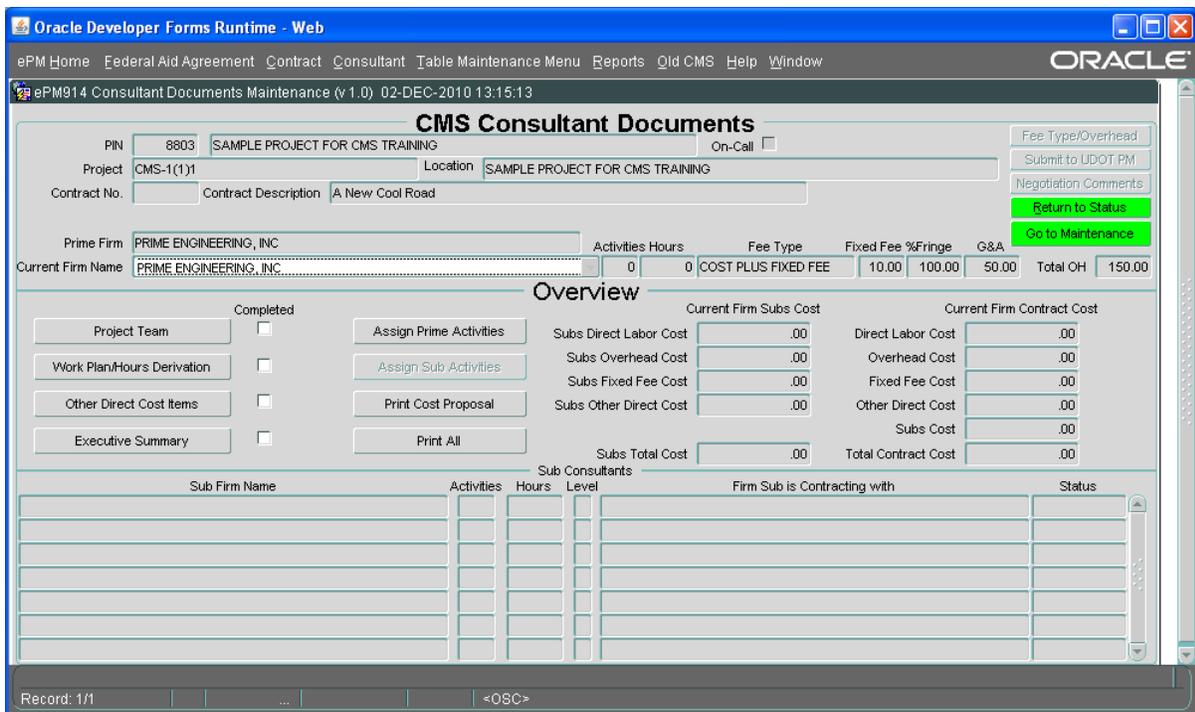
- 61 – CMS View access to data (consultants)
Allows the individual to view information in CMS
- 63 – CMS PM access to data (consultants)
Allows the individual to view some data on the 930 screen and enter contract documentation in CMS
- 64 – CMS Admin access to data (consultants)
Allows the individual to enter data on the 930 screen and view contract documentation in CMS.
- 67 – ePM View access to data (consultants)
Allows the individual to view information in ePM after your firm has been associated with a Project PIN.
- 68 – ePM Limited access to data (consultants)
Allows the individual access to some screens in ePM after your firm has been associated with a Project PIN.
- 69 – ePM PM access to data (consultants)
Allows the individual access to all consultant screens in ePM after your firm has been associated with a Project PIN.

17. Or choose the 915 Contract Status Screen under the Contract menu and find your contract under the Document Prep Tab.

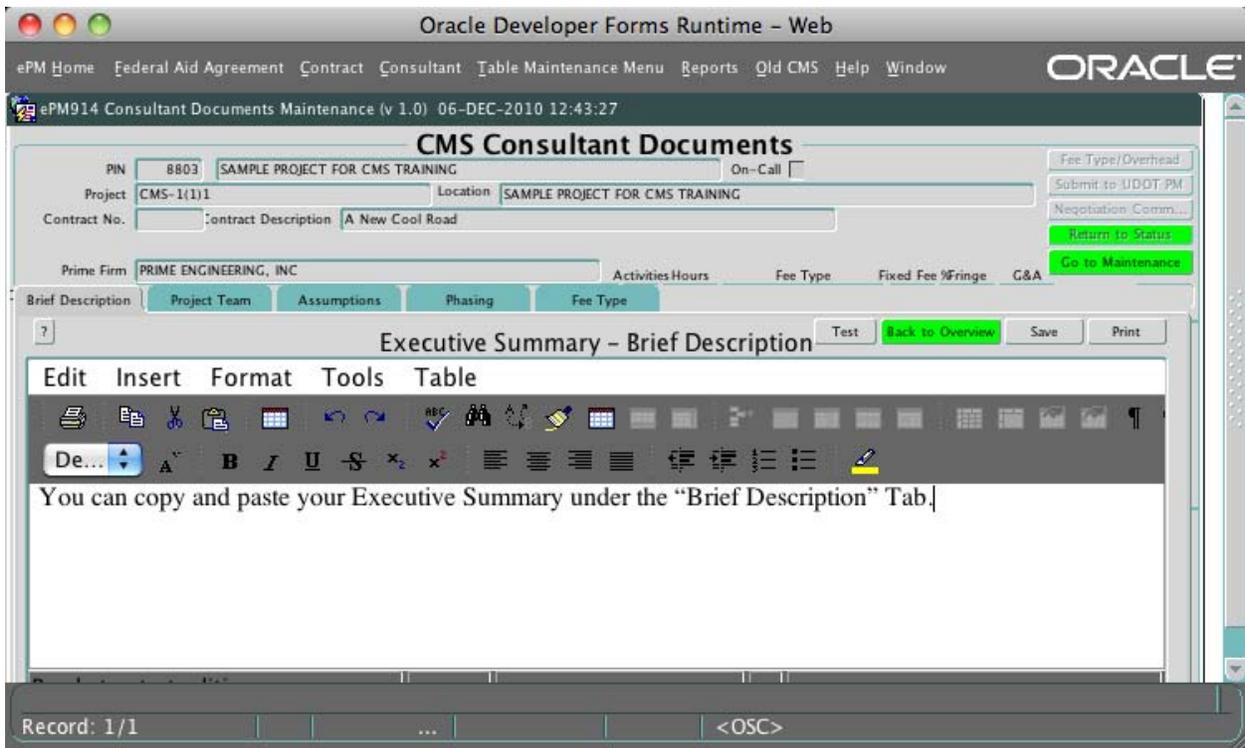
18. Double click on your contract to go to the Document Preparation Screen. All of the information you enter here will be used to generate your contract.



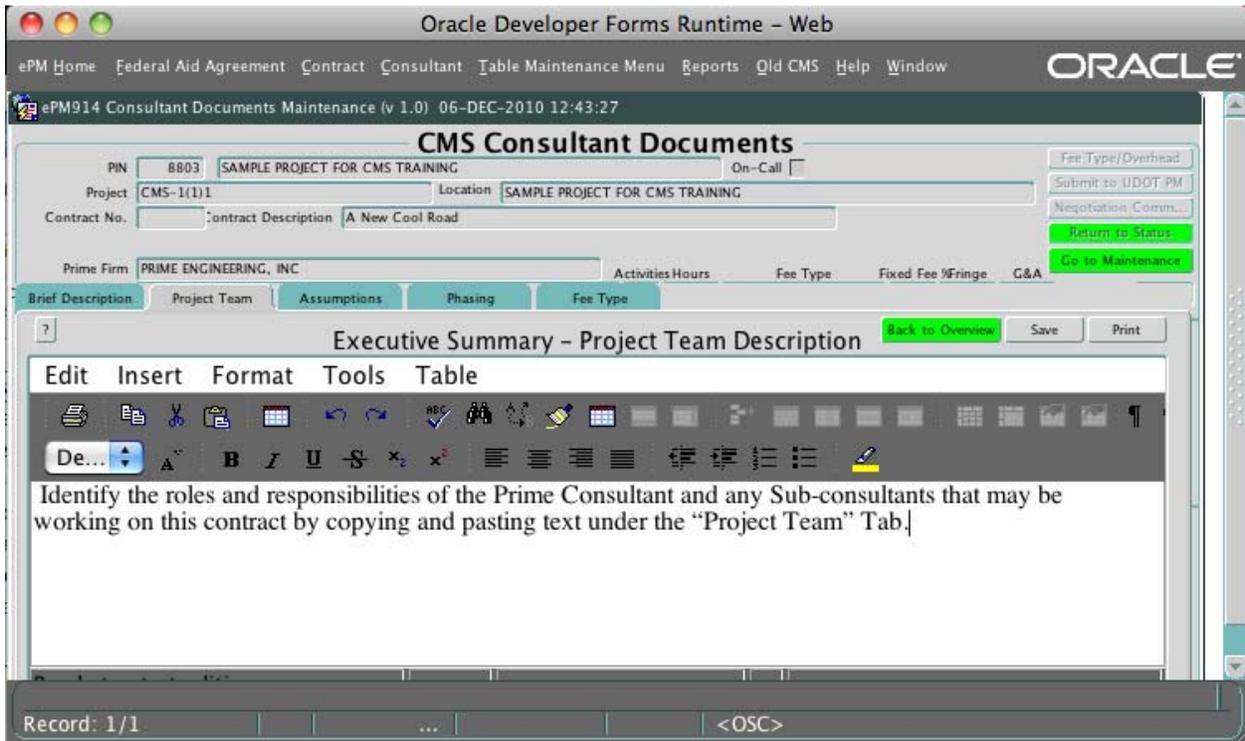
19. The primary screen in Consultant Document Prep is the Overview screen. From here, you can access all the areas necessary to complete your contract transaction.



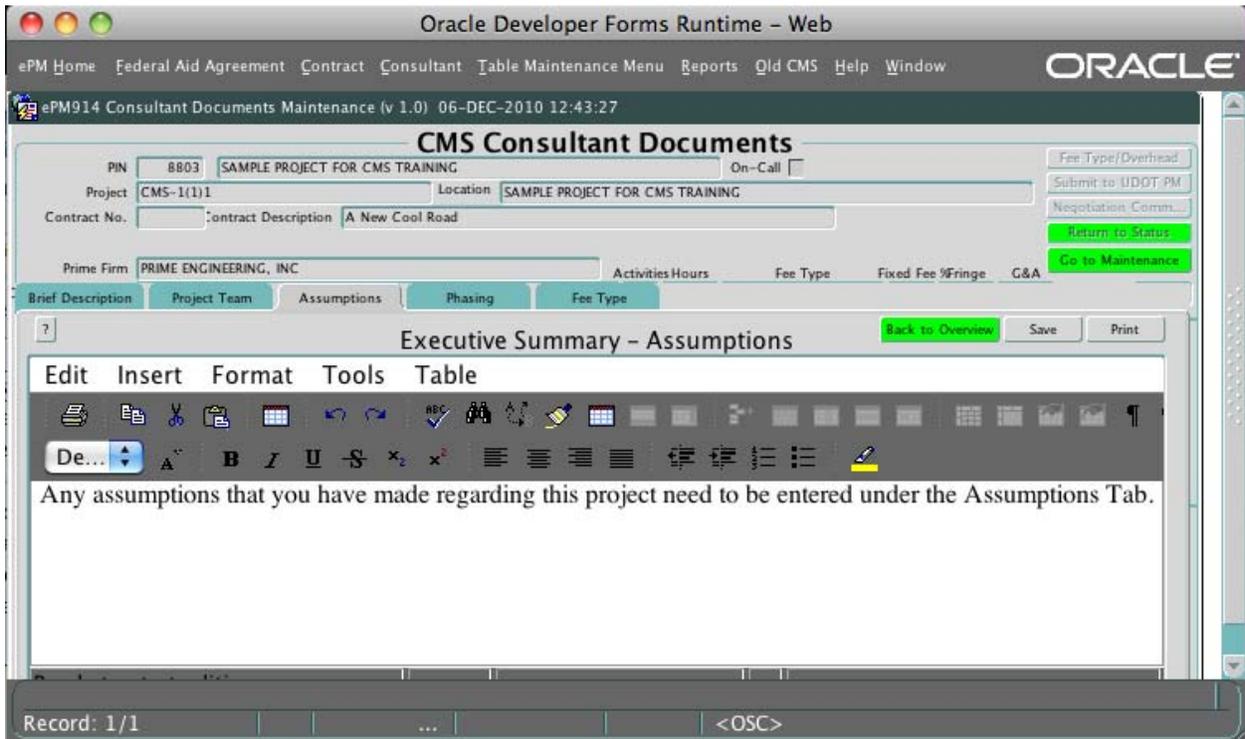
20. Select the “Executive Summary” button to complete the required information for the Executive Summary (center left).
21. In this area, you can type text directly in the appropriate fields, or you may cut and paste data from a Word.DOC. You may move around the Executive Summary tabs, but you MUST “Save” data before returning to “Overview”. Returning to “Overview” without saving will result in no data in these fields.
22. Enter the written text of your contract by clicking on the “Executive Summary” button.
 - a. You can copy and paste your Executive Summary under the “Brief Description” Tab. Click Save.



- b. Identify the roles and responsibilities of the Prime Consultant and any Sub-consultants that may be working on this contract by copying and pasting text under the “Project Team” Tab. Click Save.



- c. Identify any assumptions that you have made regarding this project under the Assumptions Tab. Click Save.



- d. Enter any information regarding phasing of this project or contract under the “Phasing” Tab. If there are none, state it. Click Save.

The screenshot shows the Oracle Developer Forms Runtime - Web interface. The title bar reads "Oracle Developer Forms Runtime - Web". The menu bar includes "ePM Home", "Federal Aid Agreement", "Contract", "Consultant", "Table Maintenance Menu", "Reports", "Old CMS", "Help", and "Window". The Oracle logo is in the top right corner. The main form is titled "CMS Consultant Documents" and contains the following fields: PIN (8803), Project (CMS-1(1)1), Location (SAMPLE PROJECT FOR CMS TRAINING), Contract No., Contract Description (A New Cool Road), and Prime Firm (PRIME ENGINEERING, INC). There are buttons for "Fee Type/Overhead", "Submit to UDOT PM", "Negotiation Comments", "Return to Status", and "Return to Maintenance". The "Phasing" tab is selected, and the "Executive Summary - Phasing Description" is displayed. The text area contains the instruction: "Enter any information regarding phasing of this project or contract under the 'Phasing' Tab. If there are none, state it." The status bar at the bottom shows "Record: 1/1" and "<OSC>".

- e. Identify the contract fee type here and indicate why it is the best choice for this contract under the “Fee Type” Tab. Click Save.

The screenshot shows the Oracle Developer Forms Runtime - Web interface. The title bar reads "Oracle Developer Forms Runtime - Web". The menu bar includes "ePM Home", "Federal Aid Agreement", "Contract", "Consultant", "Table Maintenance Menu", "Reports", "Old CMS", "Help", and "Window". The Oracle logo is in the top right corner. The main form is titled "CMS Consultant Documents" and contains the following fields: PIN (8803), Project (CMS-1(1)1), Location (SAMPLE PROJECT FOR CMS TRAINING), Contract No., Contract Description (A New Cool Road), and Prime Firm (PRIME ENGINEERING, INC). There are buttons for "Fee Type/Overhead", "Submit to UDOT PM", "Negotiation Comments", "Return to Status", and "Return to Maintenance". The "Fee Type" tab is selected, and the "Executive Summary - Fee Type Description" is displayed. The text area contains the instruction: "Identify the contract fee type here and indicate why it is the best choice for this contract under the 'Fee Type' Tab." The status bar at the bottom shows "Record: 1/1" and "<OSC>".

- f. Once you have completed all five of these tabs, click on “Back to Overview” to return to the Document Preparation Screen.
- g. Once the Executive Summary Screen has been completed, check the appropriate box next to the Executive Summary button. The system will not allow you to “Submit” your contract to the UDOT PM until you have flagged all of your contract sections as complete. (Center left)

Oracle Developer Forms Runtime – Web

ePM Home Federal Aid Agreement Contract Consultant Table Maintenance Menu Reports Old CMS Help Window ORACLE

ePM914 Consultant Documents Maintenance (v 1.0) 06-DEC-2010 12:43:27

CMS Consultant Documents

PIN 8803 SAMPLE PROJECT FOR CMS TRAINING On-Call

Project CMS-1(1)1 Location SAMPLE PROJECT FOR CMS TRAINING

Contract No. Contract Description A New Cool Road

Prime Firm PRIME ENGINEERING, INC Activities Hours Fee Type Fixed Fee %Fringe G&A

Current Firm Name PRIME ENGINEERING, INC 0 0 COST PLUS FIXED FEE 10.00 100.00 50.00 Total OH 150.00

Overview

<p>Completed</p> <p>Project Team <input type="checkbox"/></p> <p>Work Plan/Hours Derivation <input type="checkbox"/></p> <p>Other Direct Cost Items <input type="checkbox"/></p> <p>Executive Summary <input checked="" type="checkbox"/></p>	<p>Assign Prime Activities</p> <p>Assign Sub Activities</p> <p>Print Cost Proposal</p> <p>Print All</p>	<p>Current Firm Subs Cost</p> <p>Subs Direct Labor Cost .00</p> <p>Subs Overhead Cost .00</p> <p>Subs Fixed Fee Cost .00</p> <p>Subs Other Direct Cost .00</p> <p>Subs Total Cost .00</p>	<p>Current Firm Contract Cost</p> <p>Direct Labor Cost .00</p> <p>Overhead Cost .00</p> <p>Fixed Fee Cost .00</p> <p>Other Direct Cost .00</p> <p>Subs Cost .00</p> <p>Total Contract Cost .00</p>
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Sub Firm Name	Activities	Hours	Level	Firm Sub is Contracting with	Status

Record: 1/1 ... <OSC>

23. Add the Other Direct Cost Items that will be associated with this contract by clicking on the “Other Direct Cost Items” button.

The screenshot shows the Oracle Developer Forms Runtime - Web interface for CMS Consultant Documents. The main form includes fields for PIN (8803), Project (CMS-1(1)1), Location (SAMPLE PROJECT FOR CMS TRAINING), Contract No., Contract Description (A New Cool Road), and Prime Firm (PRIME ENGINEERING, INC). The 'Other Direct Costs' section is active, showing a table for 'Contract ODC's' with columns for ODC Category, ODC Item, ODC UOM, Quantity, Item Cost, and Extended Cost. A 'Back to Overview' button is visible.

ODC Category	ODC Item	ODC UOM	Quantity	Item Cost	Extended Cost

24. Add the following ODC Items by selecting “Add ODC Item”.
- First Class Postage, Quantity = 100, \$.44 each
 - 8.5” x 11” Color Photocopies, Quantity = 50, \$.15 each
 - Mileage Reimbursement, Quantity = 300, \$.50 each
 - Contracted Labor, Aerial Surveyors, Quantity = 1, at \$8,000.00

25. Your ODC Total should show as \$8,201.50 under the Other Direct Cost Screen as well as the Total Cost on the Overview Screen.

- a. Note the ODC costs for the Prime Consultant on the Overview screen (center right).
- b. Once you have completed the ODC Items, check that section off as "Complete". (center left)

Oracle Developer Forms Runtime - Web

ePM Home Federal Aid Agreement Contract Consultant Table Maintenance Menu Reports Old CMS Help Window **ORACLE**

FORM914 Consultant Documents Maintenance (V 1.0) 06-DEC-2010 12:45:27

CMS Consultant Documents

PIN: 8803 | Project: CMS-1(1)1 | Location: SAMPLE PROJECT FOR CMS TRAINING | On-Call:

Contract No.: | Contract Description: A New Cool Road

Prime Firm: PRIME ENGINEERING, INC | Activities Hours: 0 | Fee Type: COST PLUS FIXED FEE | Fixed Fee %/Fringe: 10.00/100.00 | G&A: 50.00 | Total OH: 150.00

Current Firm Name: PRIME ENGINEERING, INC

Overview

Completed		Current Firm Subs Cost		Current Firm Contract Cost	
Project Team	<input type="checkbox"/>	Subs Direct Labor Cost	.00	Direct Labor Cost	.00
Work Plan/Hours Derivation	<input type="checkbox"/>	Subs Overhead Cost	.00	Overhead Cost	.00
Other Direct Cost Items	<input checked="" type="checkbox"/>	Subs Fixed Fee Cost	.00	Fixed Fee Cost	.00
Executive Summary	<input checked="" type="checkbox"/>	Subs Other Direct Cost	.00	Other Direct Cost	8,201.50
		Subs Cost	.00	Subs Cost	.00
		Subs Total Cost	.00	Total Contract Cost	8,201.50

Sub Firm Name	Activities	Hours	Level	Firm Sub is Contracting with	Status

Record: 1/1 ... <OSC>

26. In order for you to complete your Work Plan, you need to have activities assigned to you. When this contract request was created, the UDOT PM chose activities associated with his project based on a network, or custom activities. To view and make changes to those activities, click on the “Assign Prime Activities” Button (center of screen).

Oracle Developer Forms Runtime – Web

ePM Home Federal Aid Agreement Contract Consultant Table Maintenance Menu Reports Old CMS Help Window ORACLE

CMS Consultant Documents

PIN: 8803 SAMPLE PROJECT FOR CMS TRAINING On-Call

Project: CMS-1(1)1 Location: SAMPLE PROJECT FOR CMS TRAINING

Contract No.: Contract Description: A New Cool Road

Prime Firm: PRIME ENGINEERING, INC Activities Hours: 9 Fee Type: COST PLUS FIXED FEE Fixed Fee %Fringe: 10.00 G&A: 50.00 Total OH: 150.00

Current Firm Name: PRIME ENGINEERING, INC

Overview

Completed

Project Team

Work Plan/Hours Derivation

Other Direct Cost Items

Executive Summary

Assign Prime Activities...

Assign Sub Activities

Print Cost Proposal

Print All

Current Firm Subs Cost

Subs Direct Labor Cost .00

Subs Overhead Cost .00

Subs Fixed Fee Cost .00

Subs Other Direct Cost .00

Subs Total Cost .00

Current Firm Contract Cost

Direct Labor Cost .00

Overhead Cost .00

Fixed Fee Cost .00

Other Direct Cost 8,201.50

Subs Cost .00

Total Contract Cost 8,201.50

Sub Firm Name	Activities	Hours	Level	Firm Sub is Contracting with	Status

Record: 1/1 ... <OSC>

27. The activities that have been identified for you are checked with a checkmark.
 - a. To add more activities, check the box under “Use on this Transaction” next to the activity you want.

28. Add Activity 01Z
 - a. To remove an activity, uncheck the box.
 - b. When you are done, click “Back to Overview”.
 - c. (The “Work Plan” button will take you to this activity in the Work Plan area.)

The screenshot shows a web application interface for Oracle Developer Forms Runtime. The main title is "CMS Consultant Documents". Below this, there are several input fields for project details: PIN (8803), Project (CMS-1(1)1), Location (SAMPLE PROJECT FOR CMS TRAINING), Contract No., Contract Description (A New Cool Road), and Prime Firm (PRIME ENGINEERING, INC). There are also buttons for "Return to Status" and "Go to Maintenance".

The second section is titled "Prime Activity Assignment". It contains a table with the following columns: Activity, Used on Contract, Use on this Transaction, and Work Plan. The activity "11G - PRELIMINARY GEOTECHNICAL INVESTIGATION" is highlighted in blue. The "Use on this Transaction" checkbox for this activity is checked.

Activity	Used on Contract	Use on this Transaction	Work Plan
11G - PRELIMINARY GEOTECHNICAL INVESTIGATION	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
15Y - ASSESS PROJECT AESTHETICS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17R - ASSESS MULTI-MODAL NEEDS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17Y - REVIEW PROJECT COMMITMENTS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11Y - DETERMINE ENVIRONMENTAL RESOURCES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11I - DEVELOP INITIAL PUBLIC INVOLVEMENT PLAN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11Z - DEVELOP DRAFT TRANSPORTATION MANAGEMENT PLAN (TMP)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
01W - MANAGE RIGHT-OF-WAY PROPERTY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19V - HOLD PROJECT IDENTIFICATION MEETING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23Z - DEVELOP CMGC RFP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25Z - OBTAIN CMGC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23U - DESIGNATE UTILITIES (HORIZONTAL MAPPING)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

At the bottom of the screen, there is a status bar showing "Record: 20/167" and a "<OSC>" button.

29. To complete your Work Plan, click on the “Work Plan / Hours Derivation” Button. Notice that the flag next to the “Work Plan / Hours Derivation” Button will be grayed out until you assign a duration and an employee to every activity.

Oracle Developer Forms Runtime – Web

ePM Home Federal Aid Agreement Contract Consultant Table Maintenance Menu Reports Old CMS Help Window ORACLE

CMS Consultant Documents

PIN: 8803 SAMPLE PROJECT FOR CMS TRAINING On-Call

Project: CMS-1(1)1 Location: SAMPLE PROJECT FOR CMS TRAINING

Contract No. Contract Description: A New Cool Road

Prime Firm: PRIME ENGINEERING, INC Activities Hours: 10 0 Fee Type: COST PLUS FIXED FEE Fixed Fee %: 10.00 Fringe: 100.00 G&A: 50.00 Total OH: 150.00

Current Firm Name: PRIME ENGINEERING, INC

Overview

Completed		Current Firm Subs Cost		Current Firm Contract Cost	
Project Team	<input type="checkbox"/>	Subs Direct Labor Cost	.00	Direct Labor Cost	.00
Work Plan/Hours Derivation	<input type="checkbox"/>	Subs Overhead Cost	.00	Overhead Cost	.00
Other Direct Cost Items	<input checked="" type="checkbox"/>	Subs Fixed Fee Cost	.00	Fixed Fee Cost	.00
Executive Summary	<input checked="" type="checkbox"/>	Subs Other Direct Cost	.00	Other Direct Cost	8,201.50
		Subs Total Cost	.00	Subs Cost	.00
				Total Contract Cost	8,201.50

Sub Firm Name	Activities	Hours	Level	Firm Sub is Contracting with	Status

Record: 1/1 ... <OSC>

30. If you have been assigned Network Activities (opposed to Custom Activities) you will see the corresponding Network Activity Description under the Work Plan Tab. If you wish to make changes to these descriptions, do so here and click Save.
- Make sure to enter a Total Duration for each activity in the blue box. Duration is the number of calendar days anticipated to complete this activity.
 - The Duration field is important because it will be used to develop your contract schedule.

Oracle Developer Forms Runtime - Web

ePM Home Federal Aid Agreement Contract Consultant Table Maintenance Menu Reports Old CMS Help Window ORACLE

CMS Consultant Documents

PIN: 8803 SAMPLE PROJECT FOR CMS TRAINING On-Call

Project: CMS-1(1)1 Location: SAMPLE PROJECT FOR CMS TRAINING

Contract No.: Contract Description: A New Cool Road

Prime Firm: PRIME ENGINEERING, INC Activities Hours: Fee Type: Fixed Fee %Fringe: G&A

Work Plan: Hours Derivation

Activity: 01Z PROJECT MANAGEMENT Next Activity: Previous Activity: Back to Overview Save

Work Plan Firm: PRIME ENGINEERING, INC Firm Hours: 0 Assign Activities Print

ICE Duration: Total Activity Duration (Days): 0 Total Activity Hours: 0

Activity Work Plan Description

Edit Insert Format Tools Table

De... A B I U S x x

If this is a Network Activity, you will see the corresponding Network Activity Description here. |

Ready to start editing

Record: 1/1 ... <OSC>

31. Click on the "Hours Derivation" Tab to assign staff to this activity.

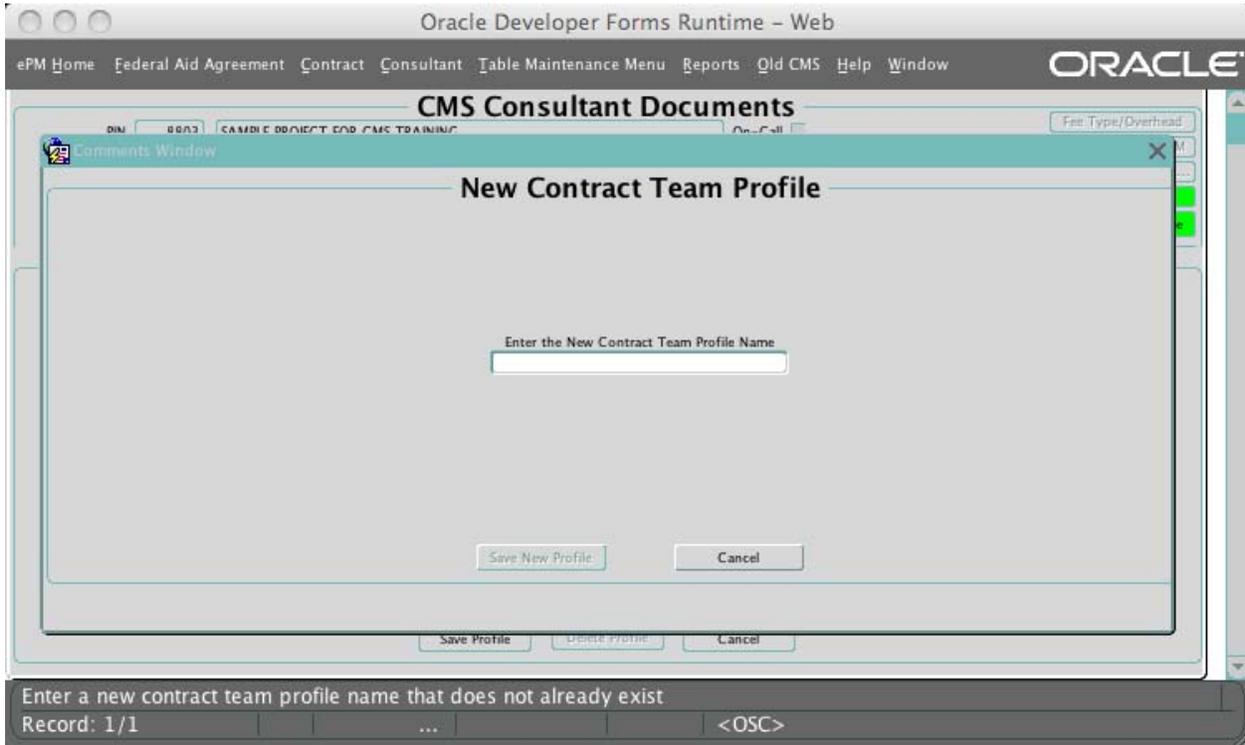
The screenshot shows the Oracle Developer Forms Runtime - Web interface. The main form is titled "CMS Consultant Documents". It contains several input fields for project details: PIN (8803), Project (CMS-1(1)1), Location (SAMPLE PROJECT FOR CMS TRAINING), Contract No., and Contract Description (A New Cool Road). The Prime Firm is PRIME ENGINEERING, INC. The "Hours Derivation" tab is selected. Below the form, there is a table with columns: Employee, Contract Job Title, Hours, Current Rate, Proposal Rate, Direct Labor, Overhead 150%, Fixed Fee 10%, and Burdened Labor. The table is currently empty. At the bottom right of the form, there are buttons for "Add Employee" and "Add Contract Team".

32. Select "Add Employee" and choose the appropriate staff members that will be assigned to this activity.

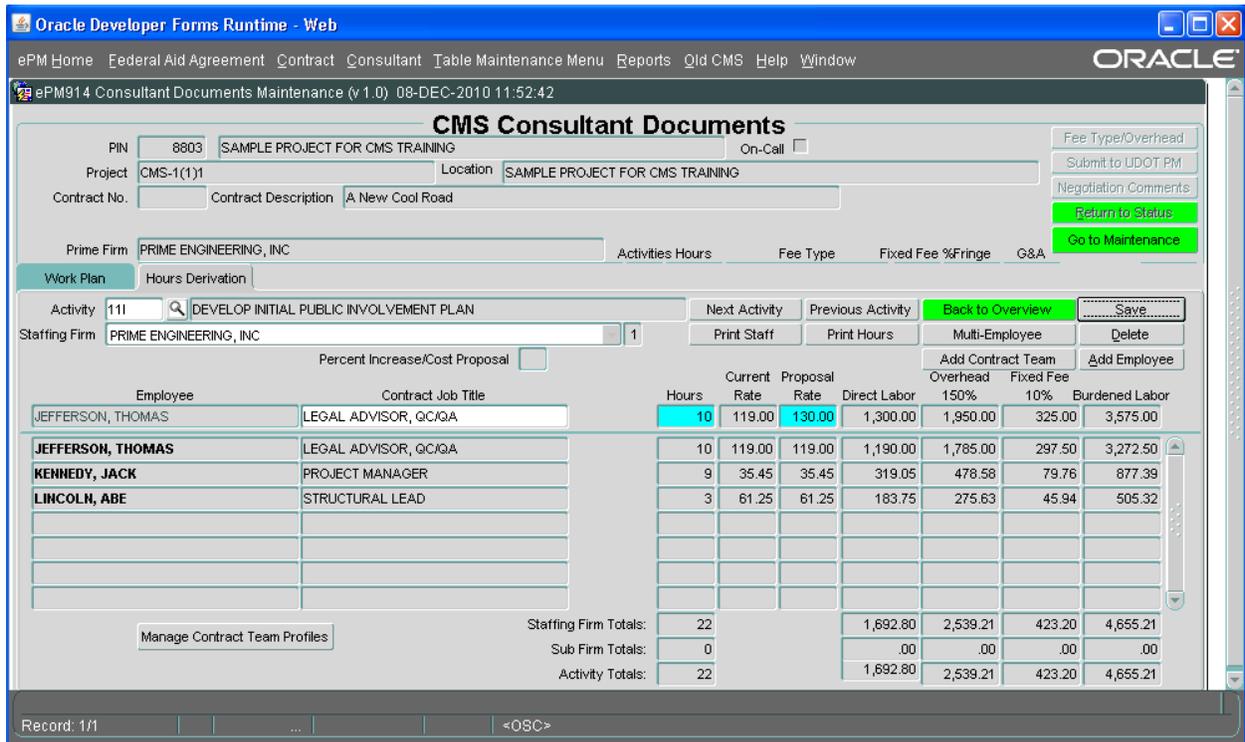
The screenshot shows the same Oracle Developer Forms Runtime - Web interface as above, but with the "Add Employee" dialog box open. The dialog box has a search field labeled "Find:" and a list of employee names: JEFFERSON, THOMAS; KENNEDY, JACK; LINCOLN, ABE; MAIN OFFICE CADD TE...; REAGAN, RONALD; ROOSEVELT, TEDDY; and WASHINGTON, GEORGE. The "JEFFERSON, THOMAS" entry is highlighted. Below the list are buttons for "Find", "OK", and "Cancel". The background form is partially obscured by the dialog box.

35. Select the employees you want to add to your team by checking the box under "Select Employee".

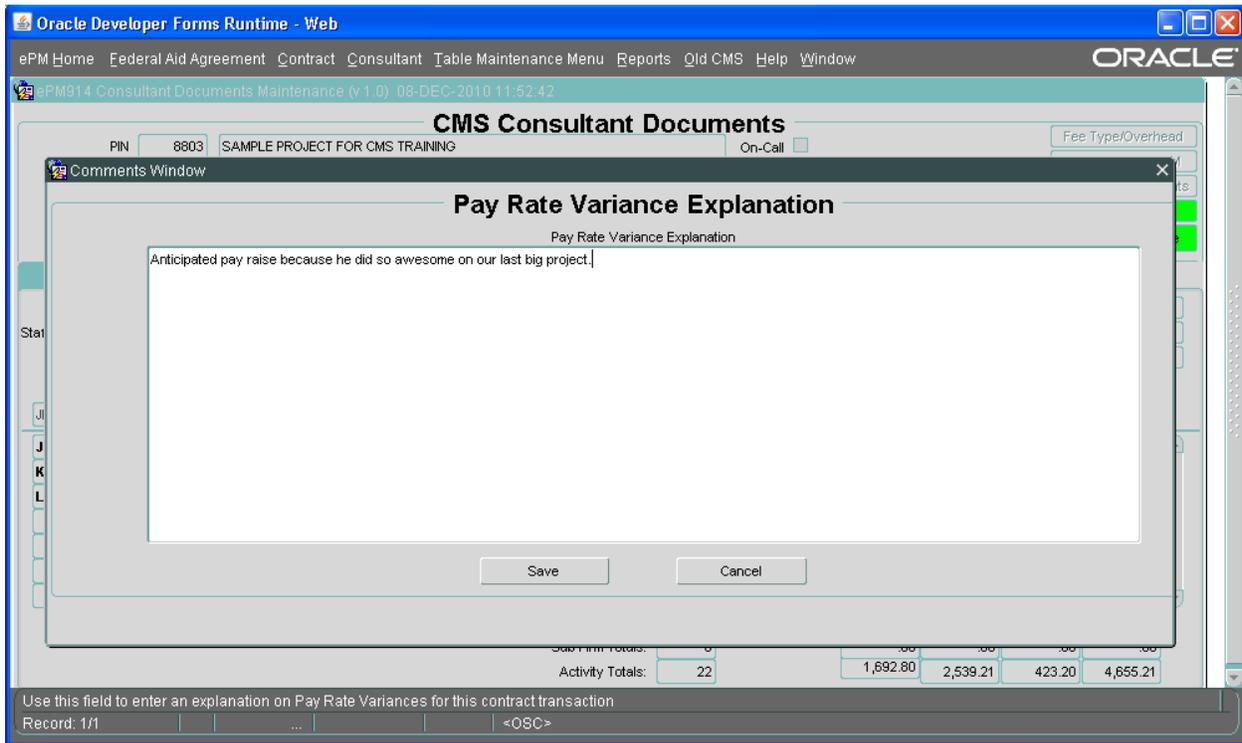
36. Enter a name for your Contract Team and click Save.



37. Notice that you can edit an employee's proposed rate of pay here.



38. When an employee's rate of pay changes from the actual rate, you will need to explain the pay rate variance when you Save.



39. After you have explained one employee's pay rate variance, the window does not automatically call up again. It is now a third Tab and can be revised to explain additional pay rate variances for other employees. UDOT Consultant Services requires explanation of pay variances for all employees with proposed rates different from their actual rates of pay.

Oracle Developer Forms Runtime - Web

ePM Home Federal Aid Agreement Contract Consultant Table Maintenance Menu Reports Old CMS Help Window

ePM914 Consultant Documents Maintenance (v 1.0) 08-DEC-2010 11:52:42

CMS Consultant Documents

PIN: 8803 SAMPLE PROJECT FOR CMS TRAINING On-Call

Project: CMS-1(1)1 Location: SAMPLE PROJECT FOR CMS TRAINING

Contract No. Contract Description: A New Cool Road

Prime Firm: PRIME ENGINEERING, INC Activities Hours Fee Type Fixed Fee %Fringe G&A

Work Plan Hours Derivation Pay Rate Variance Explanation

Activity: 111 DEVELOP INITIAL PUBLIC INVOLVEMENT PLAN

Staffing Firm: PRIME ENGINEERING, INC

Percent Increase/Cost Proposal

Buttons: Next Activity Previous Activity Back to Overview Save Print Staff Print Hours Multi-Employee Delete Add Contract Team Add Employee

Employee	Contract Job Title	Hours	Current Rate	Proposal Rate	Direct Labor	Overhead 150%	Fixed Fee 10%	Burdened Labor
JEFFERSON, THOMAS	LEGAL ADVISOR, QC/QA	10	119.00	130.00	1,300.00	1,950.00	325.00	3,575.00
KENNEDY, JACK	PROJECT MANAGER	9	35.45	35.45	319.05	478.58	79.76	877.39
LINCOLN, ABE	STRUCTURAL LEAD	3	61.25	61.25	183.75	275.63	45.94	505.32
Staffing Firm Totals:		22			1,802.80	2,704.21	450.70	4,957.71
Sub Firm Totals:		0			.00	.00	.00	.00
Activity Totals:		22			1,802.80	2,704.21	450.70	4,957.71

Record Successfully Updated

Record: 1/1 <OSC>

40. Now that you have added employees, you can create a Contract Team(s) and add these teams to appropriate activities by selecting "Add Contract Team".

CMS Consultant Documents

PIN: 8803 | Project: CMS-1(1)1 | Location: SAMPLE PROJECT FOR CMS TRAINING

Contract No.: | Contract Description: A New Cool Road

Prime Firm: PRIME ENGINEERING, INC

Activity: 01Z | PROJECT MANAGEMENT

Staffing Firm: PRIME ENGINEERING, INC

Employee	Contract Job Title	Hours	Current Rate	Proposed Rate	Direct Labor	Overhead 150%	Fixed Fee 10%	Burdened Labor
JEFFERSON, THOMAS	LEGAL ADVISOR, QC/QA	20	119.00	119.00	2,380.00	3,570.00	595.00	6,545.00
		Staffing Firm Totals:			2,380.00	3,570.00	595.00	6,545.00
		Sub Firm Totals:	0	.00	.00	.00	.00	.00
		Activity Totals:	20		2,380.00	3,570.00	595.00	6,545.00

Record: 1/1

41. Assign this team to every activity that your company has been assigned to by selecting "Save Selected Employees to All Activities", or you can save this Contract team to just this activity by selecting "Save Selected Employees to Activity XX" and go through each activity one by one.

Add Contract Team to Activity

Contract Team Profile Name: DESIGN SQUAD 1

Employee Name	Contract Job Title	Hours	Current Rate	Proposed Rate	Select Employee
JEFFERSON, THOMAS	LEGAL ADVISOR, QC/QA	1	119.00	119.00	<input checked="" type="checkbox"/>
KENNEDY, JACK	PROJECT MANAGER	1	35.45	35.45	<input checked="" type="checkbox"/>
LINCOLN, ABE	STRUCTURAL LEAD	1	61.25	61.25	<input checked="" type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

Save Selected Employees to Activity 69V | Cancel | Save Selected Employees to All Activities

PLAN REVIEW MEETING

Record: 1/3

42. Notice that when you save your Contract Team to All Activities, the system will save the hours that you have under the Hours field the same for every system activity. You can edit these hours for each activity by selecting "Next Activity" and then selecting the Multi Employee Button.

CMS Consultant Documents

PIN: 8803 | Project: CMS-1(1)1 | Contract Description: A New Cool Road

Prime Firm: PRIME ENGINEERING, INC

Activity: 111 | DEVELOP INITIAL PUBLIC INVOLVEMENT PLAN

Staffing Firm: PRIME ENGINEERING, INC

Employee	Contract Job Title	Hours	Current Rate	Proposal Rate	Direct Labor	Overhead 150%	Fixed Fee 10%	Burdened Labor
JEFFERSON, THOMAS	LEGAL ADVISOR, QC/QA	1	119.00	119.00	119.00	178.50	29.75	327.25
KENNEDY, JACK	PROJECT MANAGER	1	35.45	35.45	35.45	53.18	8.86	97.49
LINCOLN, ABE	STRUCTURAL LEAD	1	61.25	61.25	61.25	91.88	15.31	168.44
Staffing Firm Totals:		3			215.70	323.56	53.92	593.18
Sub Firm Totals:		0			.00	.00	.00	.00
Activity Totals:		3			215.70	323.56	53.92	593.18

43. Make the necessary changes to the hours for each employee for this Activity and click Save.

Multi Employee Hour Update

Activity: 111 - DEVELOP INITIAL PUBLIC INVOLVEMENT PLAN

Employee Name	Contract Job Title	Hours	Current Rate	Proposed Rate
JEFFERSON, THOMAS	LEGAL ADVISOR, QC/QA	10	119.00	119.00
KENNEDY, JACK	PROJECT MANAGER	9	35.45	35.45
LINCOLN, ABE	STRUCTURAL LEAD	3	61.25	61.25

44. Once you have assigned employees and given duration to every activity, click “Back to Overview” to flag your Work Plan/Hours Derivation as “Complete”.

CMS Consultant Documents

PIN: 8803 | SAMPLE PROJECT FOR CMS TRAINING | On-Call:

Project: CMS-1(1)1 | Location: SAMPLE PROJECT FOR CMS TRAINING

Contract No.: | Contract Description: A New Cool Road

Prime Firm: PRIME ENGINEERING, INC | Activities Hours: 10 | 49 | Fee Type: COST PLUS FIXED FEE | Fixed Fee %/Fringe: 10.00 | 100.00 | G&A: 50.00 | Total OH: 150.00

Current Firm Name: PRIME ENGINEERING, INC

Overview

Completed: Project Team, Work Plan/Hours Derivation, Other Direct Cost Items, Executive Summary

Buttons: Assign Prime Activities, Assign Sub Activities, Print Cost Proposal, Print All

Current Firm Subs Cost		Current Firm Contract Cost	
Subs Direct Labor Cost	.00	Direct Labor Cost	4,418.00
Subs Overhead Cost	.00	Overhead Cost	6,627.10
Subs Fixed Fee Cost	.00	Fixed Fee Cost	1,104.45
Subs Other Direct Cost	.00	Other Direct Cost	8,201.50
		Subs Cost	.00
Subs Total Cost	.00	Total Contract Cost	20,351.05

Sub Firm Name	Activities	Hours	Level	Firm Sub is Contracting with	Status

Record: 1/1 | <OSC>

45. Add any sub-consultants you may have by selecting “Project Team”. (center left)

CMS Consultant Documents

PIN: 8803 | SAMPLE PROJECT FOR CMS TRAINING | On-Call:

Project: CMS-1(1)1 | Location: SAMPLE PROJECT FOR CMS TRAINING

Contract No.: | Contract Description: A New Cool Road

Prime Firm: PRIME ENGINEERING, INC | Activities Hours: | Fee Type: | Fixed Fee %/Fringe: | G&A: |

Project Team

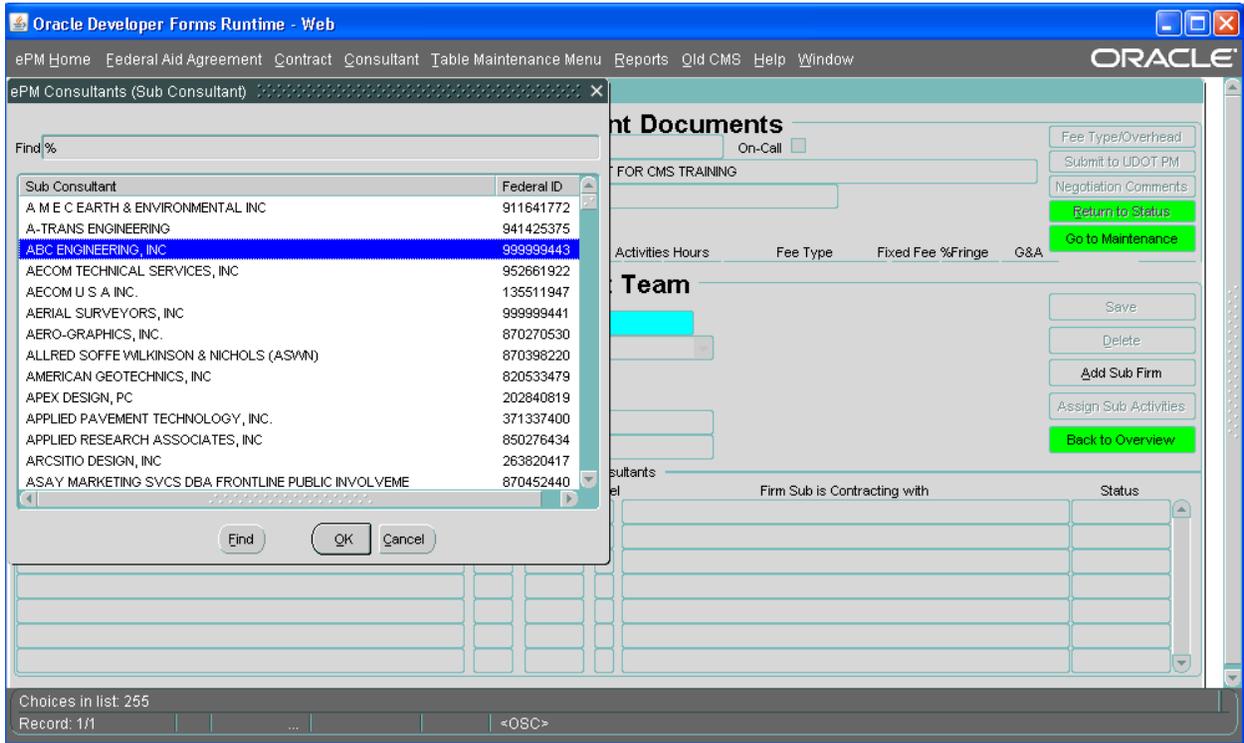
Sub Firm Name: | Firm Sub is Contracting with: | Sub Fee Type: | Sub Fixed Fee %: | Sub Contact First Name: | Last Name: | Email: | Phone: |

Buttons: Save, Delete, Add Sub Firm, Assign Sub Activities, Back to Overview

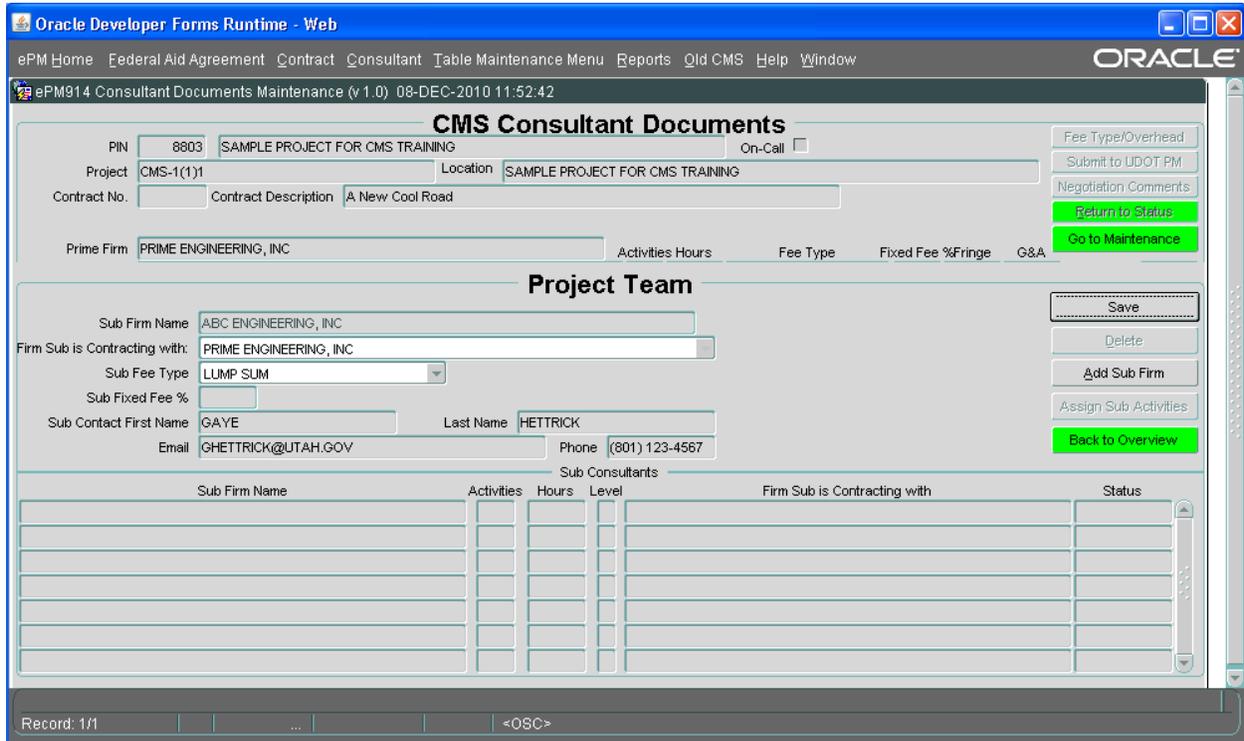
Sub Firm Name	Activities	Hours	Level	Firm Sub is Contracting with	Status

Record: 1/1 | <OSC>

46. Add ABC Engineering as a Lump Sum Contract by selecting “Add Sub Firm” and choose “ABC Engineering” from the popup window.



47. Choose “Lump Sum” as the Sub Fee Type and click ‘Save’.



48. The system will automatically bring you to the Activity Assignment Screen. Assign Activity 35Y to ABC Engineering by placing a checkmark under "Use on this Transaction".
- You can come back to this screen from the Overview by selecting "Project Team" and double clicking on your sub-consultant.

CMS Consultant Documents

PIN: 8803 | Project: CMS-1(1)1 | Contract Description: A New Cool Road

Prime Firm: PRIME ENGINEERING, INC

Activity Assignment

Sub Firm Name	Activity	Used on Contract	Use on this Transaction	Work Plan
ABC ENGINEERING, INC	01Z - PROJECT MANAGEMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	11I - DEVELOP INITIAL PUBLIC INVOLVEMENT PLAN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	21I - REVISE/IMPLEMENT PUBLIC INVOLVEMENT PLAN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	25I - IMPLEMENT PUBLIC OUTREACH	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	29V - INITIAL GEOMETRY REVIEW MEETING (SCROLL PLOT)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	31I - REVISE/IMPLEMENT PUBLIC INVOLVEMENT PLAN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	35Y - IDENTIFY AND PREPARE PERMITS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	51I - REVISE/IMPLEMENT FINAL PUBLIC INVOLVEMENT PLAN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	69V - PLAN REVIEW MEETING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	83X - FINAL REVIEW	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

49. Add Main Street Consultants as another sub-consultant by clicking on "Project Team" and selecting "Add Sub Firm".

ePM Consultants (Sub Consultant)

Sub Consultant	Federal ID
LOCKWOOD, ANDREWS, NEWNAM, INC	470363104
LOGAN SIMPSON DESIGN, INC.	860900108
LOVE COMMUNICATIONS, LLC	870634446
LPACIFIC GROUP, INC	261767703
M W BROWN ENGINEERING INC	870574700
MACTEC ENGINEERING & CONSULTING, INC.	680146861
MAIN STREET CONS, INC	999999442
MALDONADO-BURKETT INTELLIGENT TRANS. SYSTEMS,LLP	261476339
MCNEIL GROUP, INC	262885637
MEAD & HUNT, INC	390793822
MERIDIAN ENGINEERING	841401059
MERIDIAN ENGINEERING INC	200497879
METRO ANALYTICS	270903309
MICHAEL BAKER JR. INC.	251228638

Project Team

Sub Firms:

Sub Firm	Firm Sub is Contracting with	Status
PRIME ENGINEERING, INC	PRIME ENGINEERING, INC	Complete

50. Verify that Prime Engineering is selected as the firm that is hiring Main Street Consultants and click “enter”.

51. Select “Unit Price” as the Sub Fee Type. Click Save.

- a. Notice that you do not see “Cost Plus Fixed Fee” as an option for Main Street Consultants. This is because this firm has not been approved for that type of contract through UDOT Consultant Services.

CMS Consultant Documents

PIN: 8803 | SAMPLE PROJECT FOR CMS TRAINING | On-Call

Project: CMS-1(1)1 | Location: SAMPLE PROJECT FOR CMS TRAINING

Contract No.: | Contract Description: A New Cool Road

Prime Firm: PRIME ENGINEERING, INC | Activities Hours: | Fee Type: | Fixed Fee %Fringe: | G&A:

Project Team

Sub Firm Name: MAIN STREET CONS, INC

Firm Sub is Contracting with: PRIME ENGINEERING, INC

Sub Fee Type: UNIT PRICE

Sub Fixed Fee %: |

Sub Contact First Name: KELLY | Last Name: BURNS

Email: KBURNS@UTAH.GOV | Phone: (801) 123-4567

Sub Firm Name	Activities	Hours	Level	Firm Sub is Contracting with	Status
ABC ENGINEERING, INC	1	20	1	PRIME ENGINEERING, INC	Complete

Record: 1/1 | <OSC>

54. When a sub-consultant allows another firm to act in their behalf, the prime consultant can enter their contract documents for them by selecting one of your subs under "Current Firm Name".
- Select Main Street Consultants under the "Current Firm Name".

Oracle Developer Forms Runtime - Web

ePM Home Federal Aid Agreement Contract Consultant Table Maintenance Menu Reports Old CMS Help Window

ePM914 Consultant Documents Maintenance (v 1.0) 09-DEC-2010 10:18:47

CMS Consultant Documents

PIN: 8803 SAMPLE PROJECT FOR CMS TRAINING On-Call

Project: CMS-1(1)1 Location: SAMPLE PROJECT FOR CMS TRAINING

Contract No. Contract Description: A New Cool Road

Prime Firm: PRIME ENGINEERING, INC

Current Firm Name: **MAIN STREET CONS, INC**

Activities Hours: 2 Fee Type: 0 UNIT PRICE

Buttons: Fee Type/Overhead, Submit to UDOT PM, Negotiation Comments, Return to Status, Go to Maintenance

Overview

Completed		Subs Direct Labor Cost			Current Firm Subs Cost			Current Firm Contract Cost		
Project Team	<input type="checkbox"/>	Assign Prime Activities	Subs Direct Labor Cost	.00	Direct Labor Cost	.00	Direct Labor Cost	.00		
Work Plan/Hours Derivation	<input type="checkbox"/>	Assign Sub Activities	Subs Overhead Cost	.00	Overhead Cost	.00	Overhead Cost	.00		
Other Direct Cost Items	<input type="checkbox"/>	Print Cost Proposal	Subs Fixed Fee Cost	.00	Fixed Fee Cost	.00	Fixed Fee Cost	.00		
Executive Summary (Optional)	<input type="checkbox"/>	Print All	Subs Other Direct Cost	.00	Other Direct Cost	.00	Other Direct Cost	.00		
			Subs Total Cost	.00	Subs Cost	.00	Subs Cost	.00		
					Total Sub Cost	.00	Total Sub Cost	.00		

Sub Firm Name	Activities	Hours	Level	Firm Sub is Contracting with	Status

Record: 1/1 <OSC>

55. Main Street Consultants will need to enter their own Contract Documents because they have restricted your access as the prime to do so for them. To login as the Main Street PM, click on ePM Home.

56. ABC Engineering has not restricted other firms from entering contract documents for them. Prime Consultants can select ABC Engineering, Inc under "Current Firm Name" and enter contract data for their sub-consultant.

Oracle Developer Forms Runtime - Web

ePM Home Federal Aid Agreement Contract Consultant Table Maintenance Menu Reports Old CMS Help Window

ePM914 Consultant Documents Maintenance (v 1.0) 09-DEC-2010 10:18:47

CMS Consultant Documents

PIN: 8803 | Project: CMS-1(1)1 | Location: SAMPLE PROJECT FOR CMS TRAINING | On-Call:

Contract No.: | Contract Description: A New Cool Road

Prime Firm: PRIME ENGINEERING, INC | Current Firm Name: **ABC ENGINEERING, INC** | Activities Hours: 1 | 20 | Fee Type: LUMP SUM

Buttons: Fee Type/Overhead, Submit to UDOT PM, Negotiation Comments, Return to Status, Go to Maintenance

Completed		Assign Prime Activities		Subs Direct Labor Cost		Direct Labor Cost	
Project Team	<input type="checkbox"/>	Assign Sub Activities		.00		1,087.60	
Work Plan/Hours Derivation	<input type="checkbox"/>	Print Cost Proposal		.00		.00	
Other Direct Cost Items	<input type="checkbox"/>	Print All		.00		75.00	
Executive Summary (Optional)				.00		.00	
				Subs Total Cost	.00	Total Sub Cost	1,162.60

Sub Firm Name	Activities	Hours	Level	Firm Sub is Contracting with	Status

Record: 1/1 | <OSC>

57. Enter the following Contract Documents on behalf of ABC Engineering, Inc.
 - a. Add 150 miles of Mileage Reimbursement as an ODC Item
 - o Mark off Other Direct Cost Items as complete.
 - b. Add Donald Duck as an employee on Activity 35Y with 50 hours
 - o Mark off Work Plan/Hours Derivation as complete.
 - c. ABC Engineering, Inc will not be hiring a sub-consultant, so check off Project Team as complete.

Oracle Developer Forms Runtime - Web

ePM Home Federal Aid Agreement Contract Consultant Table Maintenance Menu Reports Old CMS Help Window

ePM314 Consultant Documents Maintenance (v.1.0) 09-DEC-2010 10:19:47

CMS Consultant Documents

PIN: 8803 SAMPLE PROJECT FOR CMS TRAINING On-Call

Project: CMS-1(1)1 Location: SAMPLE PROJECT FOR CMS TRAINING

Contract No. Contract Description: A New Cool Road

Prime Firm: PRIME ENGINEERING, INC Activities Hours: Fee Type:

Current Firm Name: ABC ENGINEERING, INC 1 20 LUMP SUM

[Fee Type/Overhead](#)
[Submit to UDOT PM](#)
[Negotiation Comments](#)
[Return to Status](#)
[Go to Maintenance](#)

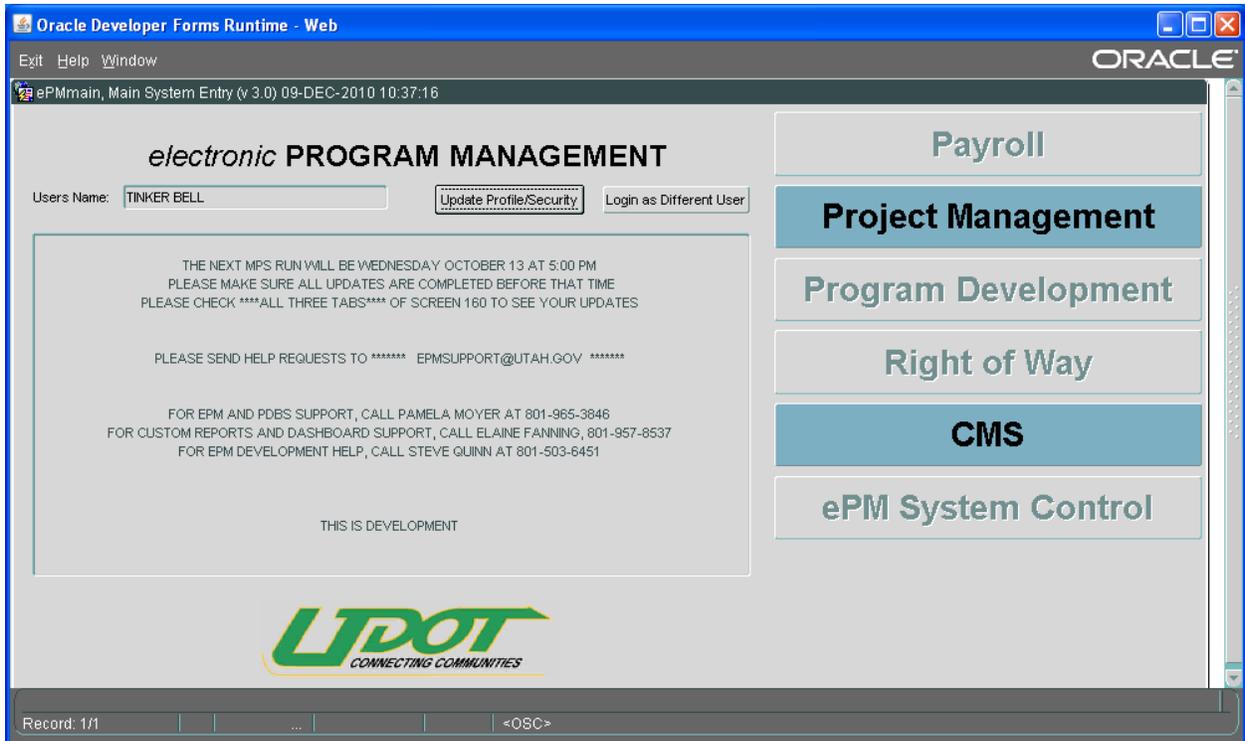
Overview

Completed		Current Firm Subs Cost			Current Firm Contract Cost	
Project Team	<input checked="" type="checkbox"/>	Subs Direct Labor Cost	.00	Direct Labor Cost	1,087.60	
Work Plan/Hours Derivation	<input checked="" type="checkbox"/>	Subs Overhead Cost	.00	Overhead Cost	.00	
Other Direct Cost Items	<input checked="" type="checkbox"/>	Subs Fixed Fee Cost	.00	Fixed Fee Cost	.00	
Executive Summary (Optional)		Subs Other Direct Cost	.00	Other Direct Cost	75.00	
		Subs Total Cost	.00	Subs Cost	.00	
				Total Sub Cost	1,162.60	

Sub Consultants					
Sub Firm Name	Activities	Hours	Level	Firm Sub is Contracting with	Status

Record: 1/1 <OSC>

58. Go back to ePM Home and click on “Login as Different User”



59. Login as MAINPM
a. Password: testing1

60. Click on CMS

61. Double click on your project.

Oracle Developer Forms Runtime - Web

ePM Home Federal Aid Agreement Contract Consultant Table Maintenance Menu Reports Old CMS Help Window

ePM Consultant Services Subsystem (v 2.0) 09-DEC-2010 10:40:28

electronic Consultant Services Subsystem

Users Name: LIGHTYEAR, BUZZ

Contract No.	PIN	Project Number	Project Location	Expiration	Status
NEW	8803	CMS-1(1)1	SAMPLE PROJECT FOR CMS TRAINING		DOC PREP
NEW	8810	CMS-1(1)8	SAMPLE PROJECT FOR CMS TRAINING		DOC PREP
NEW	8807	CMS-1(1)5	SAMPLE PROJECT FOR CMS TRAINING		DOC PREP
NEW	8808	CMS-1(1)6	SAMPLE PROJECT FOR CMS TRAINING		DOC PREP
NEW	8809	CMS-1(1)7	SAMPLE PROJECT FOR CMS TRAINING		DOC PREP
NEW	8817	CMS-1(1)15	SAMPLE PROJECT FOR CMS TRAINING		DOC PREP
NEW	8811	CMS-1(1)9	SAMPLE PROJECT FOR CMS TRAINING		DOC PREP
NEW	8812	CMS-1(1)10	SAMPLE PROJECT FOR CMS TRAINING		DOC PREP
NEW	8813	CMS-1(1)11	SAMPLE PROJECT FOR CMS TRAINING		DOC PREP
NEW	8816	CMS-1(1)14	SAMPLE PROJECT FOR CMS TRAINING		DOC PREP
NEW	8803	CMS-1(1)1	SAMPLE PROJECT FOR CMS TRAINING		INFO PENDING

Record: 1/11

<OSC>

62. Enter the following Contract Document information for Main Street Consultants.
- Add quantity 500, First Class Postage at .44 each as an ODC Item
 - Mark off Other Direct Cost Items as complete.
 - Add Marilyn Monroe as an employee on Activity 29V with 10 hours
 - Add Grace Kelly as an employee on Activity 69V with 20 hours
 - Mark off Work Plan/Hours Derivation as complete.
 - Main Street Consultants will not be hiring a sub-consultant so check off Project Team as complete.
 - Notice you do not have access to Prime Consultants contract information.

63. Click ePM Home and log back in as the PRIMEPM

64. Click on CMS and double click on your project.

65. Now that contract documents for the prime and subs have been completed, you can now check your Work Plan / Hours Derivation Section as complete.

CMS Consultant Documents

PIN: 8803 | Project: CMS-1(1)1 | Location: SAMPLE PROJECT FOR CMS TRAINING

Contract Description: A New Cool Road

Prime Firm: PRIME ENGINEERING, INC | Current Firm Name: PRIME ENGINEERING, INC

Activities Hours: 10 | 68 | Fee Type: COST PLUS FIXED FEE | Fixed Fee %: 10.00 | Fringe: 100.00 | G&A: 50.00 | Total OH: 150.00

Current Firm Subs Cost		Current Firm Contract Cost	
Subs Direct Labor Cost	5,065.00	Direct Labor Cost	6,313.10
Subs Overhead Cost	.00	Overhead Cost	9,469.75
Subs Fixed Fee Cost	.00	Fixed Fee Cost	1,578.23
Subs Other Direct Cost	295.00	Other Direct Cost	8,201.50
		Subs Cost	5,360.00
Subs Total Cost	5,360.00	Total Contract Cost	30,922.58

Sub Firm Name	Activities	Hours	Level	Firm Sub is Contracting with	Status
ABC ENGINEERING, INC	1	20	1	PRIME ENGINEERING, INC	Complete
MAIN STREET CONS, INC	2	40	1	PRIME ENGINEERING, INC	Complete

Notice that the information entered by Main Street Consultants is now visible to you as the Prime. For example, click on Work Plan/Hours Derivation to view the employee information that Main Street Consultants has added.

CMS Consultant Documents

Activity: 29V | INITIAL GEOMETRY REVIEW MEETING (SCROLL PLOT)

Staffing Firm: MAIN STREET CONS, INC

Employee	Contract Job Title	Hours	Current Rate	Proposal Rate	Direct Labor	Overhead	Fixed Fee Burdened Labor
MONROE, MARILYN	ENVIRONMENTAL SPECIALIST	10	45.79	109.95	1,099.50	.00	.00
Staffing Firm Totals:		10			1,099.50	.00	.00
Sub Firm Totals:		0			.00	.00	.00
Activity Totals:		10			1,099.50	.00	.00

66. Check off your sections as complete and click "Submit to UDOT PM". (upper right)

CMS Consultant Documents

PIN: 8803 | Project: CMS-1(1)1 | Location: SAMPLE PROJECT FOR CMS TRAINING

Contract No.: | Contract Description: A New Cool Road

Prime Firm: PRIME ENGINEERING, INC | Current Firm Name: PRIME ENGINEERING, INC

Activities Hours: 10 | Fee Type: COST PLUS FIXED FEE | Fixed Fee %: 10.00 | Fringe: 100.00 | G&A: 50.00 | Total OH: 150.00

Overview

Current Firm Subs Cost		Current Firm Contract Cost	
Subs Direct Labor Cost	5,065.00	Direct Labor Cost	6,313.10
Subs Overhead Cost	.00	Overhead Cost	9,469.75
Subs Fixed Fee Cost	.00	Fixed Fee Cost	1,578.23
Subs Other Direct Cost	295.00	Other Direct Cost	8,201.50
		Subs Cost	5,360.00
Subs Total Cost	5,360.00	Total Contract Cost	30,922.58

Sub Firm Name	Activities	Hours	Level	Firm Sub is Contracting with	Status
ABC ENGINEERING, INC	1	20	1	PRIME ENGINEERING, INC	Complete
MAIN STREET CONS, INC	2	40	1	PRIME ENGINEERING, INC	Complete

67. Add any comments you want to include with your contract to the UDOT PM. These comments are saved with the contract. Click "Submit to UDOT PM". Consultant Services recommends this area be used to re-state communication you have had with your UDOT PM.

CMS Consultant Documents

PIN: 8803 | Project: SAMPLE PROJECT FOR CMS TRAINING

Comments Window

Submit to UDOT PM

Comments to UDOT PM

Please review our contract asap.

Submit to UDOT PM | Cancel

Practice Exercises

Exercise 1: Find the rate of pay of Grace Kelly

Exercise 2: Find the overhead rate of ABC Engineering

Exercise 3: Find out if the financial screening for Prime Engineering is valid

Exercise 4: Identify the total dollars for Main Street Consultants

Exercise 5: Identify which tasks have been assigned to Main Street Consultants

Exercise 6: Find out if Main Street Consultants has been authorized to use Travel Expenses as an ODC Category.

Exercise 7: Find how many contracts does Prime Engineering have active.