



## eBuilder User Guide

# 20.10 – Standard Consultant Agreement Process

*(can be used for all Agreement Processes)*

Revision History			
Rev #	Reason	Date	Revised By
0	Initial Release	7/1/2024	Bill Copeland



## Initiation/Start Step |

Just as the project manager does today to complete the Agreement Request Form, the PM will initiate the Standard Consultant Agreement (SCA) process in eBuilder and enter the information in the page layout as opposed to the Agreement Request Form. This will initiate the workflow process and route the SCA to the Agreement Admin in the next step to complete the agreement request.

### Commitment Details:

#### 20.10 - Standard Consultant Agreement (SCA)

Instructions

##### Start Process

Print Check Spelling Submit Save Draft Cancel

Project:	Sample Test Project Columbia
Project Number:	C9999999
Process:	20.10 - Standard Consultant Agreement
Counter Prefix:	<input type="text"/>

Useful information to help complete the request

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

Expand All | Collapse All

##### Instructions

In this process you are starting the steps to document a Standard Consultant Agreement (SCA). You can save a draft of the SCA and complete at a future date, or you can submit a completed draft to route to the next step in the process.

##### Commitment Details - Notes:

- Disregard Master Commitment
- For General Consultant Agreement - Select Non-PO from Commitment Type.
- Commitment Control cannot be uncontrolled, you will receive the workflow back in court for correction

##### Actions to be taken:

- **Submitted** – Begin the approval process of the [Standard Consultant Agreement](#).
- **Save** – Draft status, allows the user to save information about the agreement without sending it for the approval. Users will have to open the process again to submit or delete the process.

Leave default value for agreements

##### Commitment Details

Select **Non - PO**

Select **Control by Commitment Item**

Status:	Draft		
Master Commitment:	Please select a master commitme		
* Commitment Type:	Select one...	* Unit Cost Options:	Lump Sum Amount
* Commitment Control:	Controlled by Commitment Item	Company Number:	<input type="text"/>
* Company:	<input type="text"/>		
Contact:	Select a contact...		

Select either **Lump Sum Amount** or **Quantity / Unit Cost**

Select **Company**. If you can't find the company, have Agreement Admin add them.

List of Contacts will populate when the Company is selected. If not in the list notify the Agreement Admin to add.

Company Number will populate when the Company is selected.

## Commitment Others / Commitment Custom Fields:

Complete the following fields in the Commitment Others and Commitment Custom Fields:

Enter today's date.

Enter scope of work from proposal.

Leave at 0.00%.

Select appropriate options.

**Note: Complete any additional information if known at this time.**

Commitment Others	
Commitment Date:	<input type="text" value=""/>
Scope of work:	<input type="text" value=""/>
* Retainage Percent:	<input type="text" value="0.00"/>
Notice to Proceed Date:	<input type="text" value=""/>
Retainage amount:	<input type="checkbox"/> Support manual entry

Commitment Custom Fields	
* Document Type:	<input type="text" value="Please select..."/>
* Commitment Category:	<input type="text" value="Please select..."/>
* NTE or Lump Sum?:	<input type="text" value="Please select..."/>
PO Number:	<input type="text" value=""/>
Current Substantial Completion Date:	<input type="text" value=""/>
General Liability Insurance Expiration Date:	<input type="text" value=""/>
Workers Compensation Insurance Expiration Date:	<input type="text" value=""/>
Automobile Insurance Expiration Date:	<input type="text" value=""/>
Professional Liability Insurance Expiration Date:	<input type="text" value=""/>
Builder's Risk Insurance Expiration Date:	<input type="text" value=""/>
Extension Days:	<input type="text" value="0"/>
Umbrella Liability:	<input type="text" value=""/>

This will be filled-in at the end when the integration with PS is complete.

## Commitment Items:

In this section you will need to add the PCS line item that will fund the agreement. In the Description field it is recommended to use the Consultant's name and the abbreviation for the type of agreement (*Company Name – SCA*):

### Commitment Items

There are no commitment items

#### Add New Commitment Item

Item Number	001
Budget Line Item	Please Select a Line Item
Current Budget	
Description	
Retainage Percent	0.00
Amount	0.00
Allowance Item?	<input type="checkbox"/>
Custom Fields	
<input type="button" value="Add"/>	

Enter the agreement amount.

#### Budget Line Items

Account Code	Description
742000-6500	General Invoices to be Allocated (Accounting Use Only)
742000-6501	Offset to General Invoices (Accounting Use Only)
750000-0100	Basic Services
750000-0800	Asbestos Testing
750000-2550	Code Inspections
750000-5110	Air Monitoring

#### Commitment Items Custom Fields For: 001

##### Commitment Item Details

Commitment Line Item:	001 -
Budget Line Item:	Please Select a Line Item -

##### Commitment Item Custom Fields

MoCode:	
---------	--

Enter the Project MoCode if you have it.

## Contract Documentation:

In this section the PM will add their contact information, attach the Consultant Selection Summary (if one was required) and the Consultant's proposal, and identify if this agreement requires UM System review:

Project Manager will complete these sections.

Contract Documentation	
Project Manager:	Please enter the name of the project manager. <input type="text"/>
Mailing Address: 	<input type="text"/>
City:	<input type="text"/>
State:	<input type="text"/>
Zip Code:	<input type="text"/>
Other Exhibits:	<input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/>
Alternate Consultant Fee Schedule:	Alternate Consultant Fee Schedule (if required) See Article 9.2. Examples include: Civil Engineering Project <input type="text"/>
Certificate of Insurance Review:	<b>Please check all that apply:</b> <input type="checkbox"/> General Liability equals 1 million per occurrence <input type="checkbox"/> General Liability equals 2 million aggregate <input type="checkbox"/> General Liability additional insured <input type="checkbox"/> Certificate Holders equals "The officers, employees, and agents of The Curators of the University of Missouri" <input type="checkbox"/> Umbrella if needed <input type="checkbox"/> Umbrella additionally insured <input type="checkbox"/> Auto Insurance-Any <input type="checkbox"/> Auto Insurance-Owned <input type="checkbox"/> Auto Insurance-Hired <input type="checkbox"/> Auto Insurance- Non-owned <input type="checkbox"/> Auto Insurance- Letter from Consultant stating "No owned autos" <input type="checkbox"/> Work Comp 500K <input type="checkbox"/> Work Comp Waiver <input type="checkbox"/> Professional Liability 1 million
Certificates of Insurance:	<input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/>
Consultant Selection Summary:	Please attach the Consultant Selection Summary. The document can be found at <a href="https://collaborate.umsystem.edu/sites/fpd/public/docs/Consultant%20Selection%20Summary.docx">https://collaborate.umsystem.edu/sites/fpd/public/docs/Consultant%20Selection%20Summary.docx</a> <input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/>
Bid/Proposal Document:	<input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/>
Does the Standard Consultant Agreement Require UM System Approval?:	If either statement below is true, please select "Yes". <ul style="list-style-type: none"><li>• Construction cost is equal to or greater than \$500,000</li><li>• Sum of all fees (i.e.: studies, agreements, inspections, etc.) are equal to or greater than \$100,000</li></ul> <input type="text" value="-- Please select an option --"/>

# Project Schedule and Scope:

Complete the following section just as you would on the ARF form.

Project Schedule and Scope	
What is the estimated total project budget?:	<input type="text"/>
Total Construction Amount Available:	<input type="text"/>
Submit SD Review Documents to Owner:	<input type="text"/>
Schematic Design Phase Complete: <input checked="" type="checkbox"/>	<input type="text"/>
Submit DD Review Documents to Owner:	<input type="text"/>
Design Development Phase Complete: <input checked="" type="checkbox"/>	<input type="text"/>
Submit CD Review Documents to Owner:	<input type="text"/>
Construction Documents Complete: <input checked="" type="checkbox"/>	<input type="text"/>
Advertising:	<input type="text"/>
Bid Opening:	<input type="text"/>
Construction Start: <input checked="" type="checkbox"/>	<input type="text"/>
Construction Complete:	<input type="text"/>
Number of SD Review Copies Required:	Electronic <input type="text"/>
Number of DD Review Copies Required:	Electronic <input type="text"/>
Number of CD Review Copies Required:	Electronic <input type="text"/>
Agreement Amount:	<input type="text"/>
Consultant's Fee Description:	<input type="text"/>
Amount of Professional Liability Insurance Required: <input checked="" type="checkbox"/>	Professional Liability in the amounts stated in 2.1.10.5 Exhibit A. <input type="text" value="1000000.00"/>
Life Cycle Cost Studies for Alternate Systems Required:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Projected Energy Performance Estimate Required:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Record Drawings: 1 Set on Mylar and 1 Set on High Quality Bond Paper:	<input type="radio"/> Yes <input type="radio"/> No
Record Drawings: 2 sets on High Quality Bond Paper:	<input type="radio"/> Yes <input type="radio"/> No
AutoCad Drawings:	<input checked="" type="radio"/> Yes <input type="radio"/> No
PDF Drawings:	<input checked="" type="radio"/> Yes <input type="radio"/> No

## Required Visits:

**Required Visits**

Prebid Meetings:	<input type="radio"/> Yes <input type="radio"/> No
Bid Openings:	<input type="radio"/> Yes <input type="radio"/> No
Number of Construction Observation Visits included:	3 Visits is Standard. <input type="text"/>
Max allowance per additional visit:	<input type="text"/>

**Complete all sections.**

Once completed, click **Submit** at the top or bottom of the screen to send this to the Agreement Administrator. By clicking on **Save Draft**, you can save your process to complete later.

## Contract Administration Step |

Once you are aware that a proposal it accepted request the Consultant's Certificate of Insurance by email. The certificate of insurance will be added in this step of the process. Once the process is in your court you need to review and make sure the SCA information is correct. You can open the attached proposal to verify information as needed.

### Agreement Documentation:

**Agreement Documentation**

Consultant's Fee Description:	To the end and back
Alternate Consultant Fee Schedule:	Alternate Consultant Fee Schedule (if required) See Article 9.2. Examples include: Civil Engineering Project
Other Exhibits:	<input type="text"/> or <input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/>
UM Contracting Officer:	
* Certificate of Insurance Review:	<b>Please check all that apply:</b> <input type="checkbox"/> General Liability equals 1 million per occurrence <input type="checkbox"/> General Liability equals 2 million aggregate <input type="checkbox"/> General Liability additional insured <input type="checkbox"/> Certificate Holders equals "The officers, employees, and agents of The Curators of the University of Missouri" <input type="checkbox"/> Umbrella if needed <input type="checkbox"/> Umbrella additionally insured <input type="checkbox"/> Auto Insurance-Any <input type="checkbox"/> Auto Insurance-Owned <input type="checkbox"/> Auto Insurance-Hired <input type="checkbox"/> Auto Insurance- Non-owned <input type="checkbox"/> Auto Insurance- Letter from Consultant stating "No owned autos" <input type="checkbox"/> Work Comp 500K <input type="checkbox"/> Work Comp Waiver <input type="checkbox"/> Professional Liability 1 million
* Certificates of Insurance:	<input type="text"/> or <input type="button" value="Browse Computer"/> <input type="button" value="Browse e-Builder"/>

After attaching the certificate of insurance, please check options that apply.

Attach the certificate of insurance received from the consultant.

### Consultant's Hourly Rate Schedule:

Add the labor rates under the Consultant's Hourly Rate Schedule. Labor Rates can be added manually or through an import process:

**Import** – First download the import template. Complete and then click on Import.

**Manual** - Enter the following information and click Add. Repeat until all labor rates are added.

Consultant's Hourly Rate Schedule

Show Filter | Select All Row Height: 1X

	#	Title	Hourly Rate	Hourly Rate Firm Name
Delete	1	Test	150.00	200
<b>Grand Totals (1 items)</b>				

**Add New Item for Consultant's Hourly Rate Schedule**

Title	<input type="text"/>
Hourly Rate	<input type="text"/>
Hourly Rate Firm Name	<input type="text"/>
<input type="button" value="Clear"/> <input type="button" value="Add"/>	

### Supplier Diversity Participation:

The last section of the page layout for the Agreement Admin step is the Supplier Diversity Participation. Enter Diversity Goal and any additional information you may have.

For agreements, select YES or NO.

Complete as much information as you

**Supplier Diversity Participation**

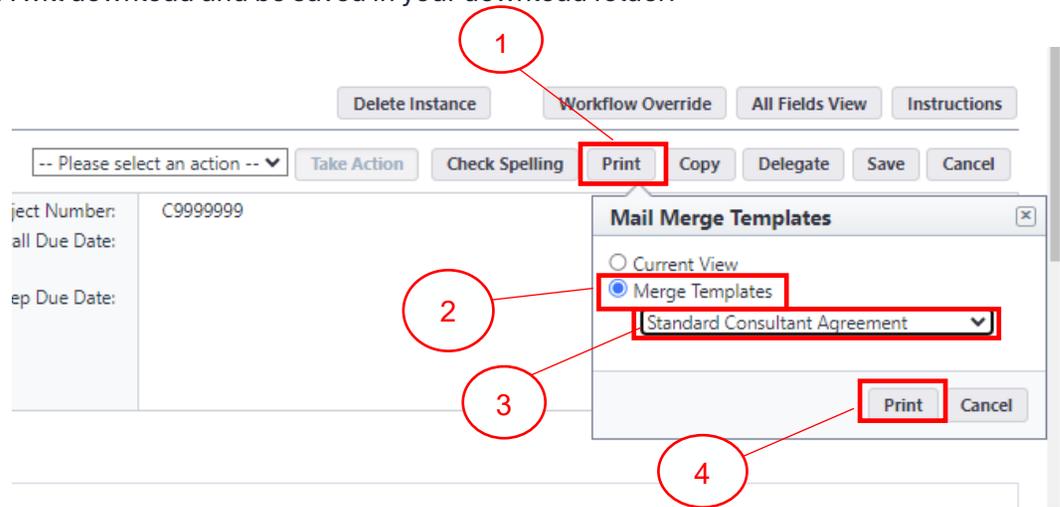
Diversity Participation Goal: <input type="checkbox"/>	<input type="text"/>	Diversity Participation Contact:	<input type="text"/>
* Supplier Diversity Check:	Have you verified the Supplier Diversity on the print preview? <input type="text" value="-- Please select an option --"/>	Diversity Participation Contact Phone:	Please enter the phone number in (000)000-0000 format. <input type="text"/>
Diversity Participation Total Dollars:	<input type="text"/>	Diversity Participation Total Percent:	<input type="text"/>
MBE Dollars:	<input type="text"/>	MBE Percent:	<input type="text"/>
SDVE Dollars:	<input type="text"/>	SDVE Percent:	<input type="text"/>
WBE Dollars:	<input type="text"/>	WBE Percent:	<input type="text"/>
Veteran Dollars:	<input type="text"/>	Veteran Percent:	<input type="text"/>
DBE Dollars:	<input type="text"/>	DBE Percent:	<input type="text"/>
Diversity Participation Summary Prepared By:	<input type="text"/>	Diversity Participation Director Review by:	<input type="text"/>
Supplier Diversity Supporting Documentation:	<input type="text" value="Drag and drop file here"/> or <input type="button" value="Browse e-Builder"/> <input type="button" value="Browse Computer"/>	Diversity Participation Director Review Date:	<input type="text"/> <input type="button" value="Calendar"/>
		Prepared on Date:	<input type="text"/> <input type="button" value="Calendar"/>

Once completed you can Take Action “**Reviewed**” to send to the next step in the workflow or “**Revise Request**” to send it back to the Initiator Review step (Project Manager) to revise. Revise Request will require you to enter a comment(s).

**Optional - Print View of SCA:**

At any point prior to the Mail Merge, you can view the agreement by clicking **Print** button, choose **Merge Templates**, and select the **Standard Consultant Agreement** and then click **Print**. A copy of the SCA will download and be saved in your download folder.

**Note:** This is not the copy to use or send to the consultant.



**Accounting Review Step |**

In this step the accountant will create and assign the project MoCode for the project. The project MoCode will then be applied to the commitment line item(s) and should be communicated to the Project Manager. At which point, the Project Manager can then add the project MoCode(s) to the Project Details page for future reference.

**Commitment Items:**

Commitment Items

	Item Number	Line Item	Description	Current Budget	Retainage Percent	Amount	Allowance	Custom Field(s)	
<input type="checkbox"/>	001	750000-0100	Basic Services	560,500.00	0.00	5,000.00	<input type="checkbox"/>		Delete
<b>Total</b>				560,500.00		5,000.00			

Click on the icon to add the project MoCode to the commitment line item.

Once completed you can Take Action “**Reviewed**” to send to the next step in the workflow or “**Revise**” to send it back to the Initiator Review step (Project Manager) to revise. Revise action will require you to enter a comment(s).

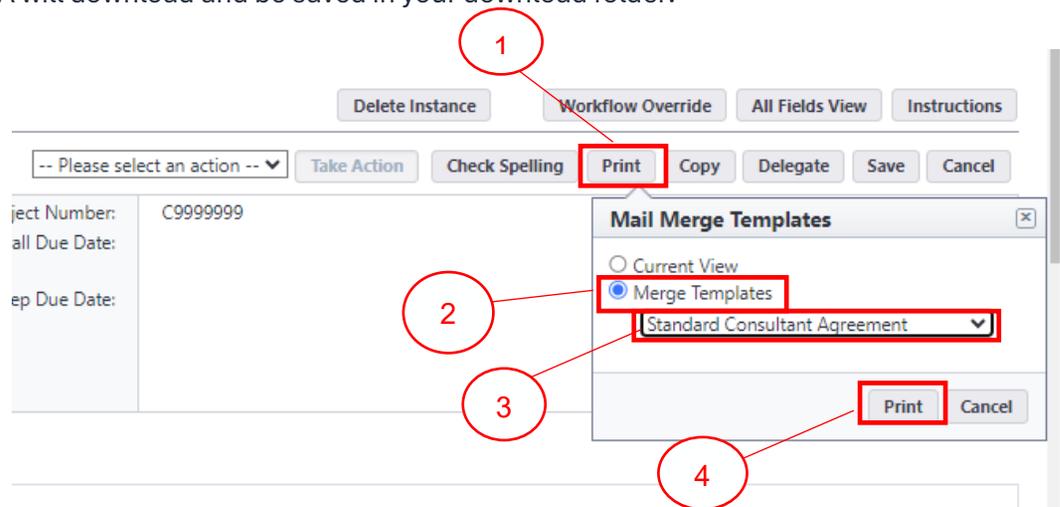
## Director Review Step |

In this step the PDC Director is reviewing the completed SCA process with the attached Proposal and the Consultant Selection Summary. Once completed you can Take Action “**Reviewed**” to send to the next step in the workflow or “**PM Revise**” to send it back to the Initiator Revise step (Project Manager) to revise. PM Revise will require you to enter a comment(s).

### Optional - Print View of SCA:

At any point prior to the Mail Merge, you can view the agreement by clicking **Print** button, choose **Merge Templates**, and select the **Standard Consultant Agreement** and then click **Print**. A copy of the SCA will download and be saved in your download folder.

**Note:** This is not the copy to use or send to the consultant.



## Contracting Officer Campus Review |

In this step the Campus Contracting Officer is reviewing the completed SCA process, attached mail merge SCA Agreement, Proposal, and the Consultant Selection Summary.

Once completed you can Take Action “**Approved**” to forward to the next step to prep the SCA for consultant signatures or “**Revise Request**” to send back to the initiator to revise. This will require you to enter a comment(s). Note: If the SCA exceeds campus signing authority, it will be routed to FPD for review.

## Contract Admin: Agreement Routing |

---

In this step the SCA agreement is being prepped for electronic signature for the consultant. [Instructions for DocuSign or Adobe Sign preparation.](#)

You can Take Action “**Inside eBuilder**” to forward to the consultant for execution. If you need to make edits to the standard template SCA agreement, you will Take Action “**Outside Sign.**” Contact eBuilder Administrator for help with exceptions to the regular process.

Essentially, you will need to make edits to the SCA template, save and attach the new agreement in the Contract Admin: Agreement Pending step and then Take Action “**Reroute**” to Contract Admin: Agreement Routing to obtain electronic signatures or Take Action “**Docs Printed**” to send for physical signatures.

## Consultant Final Execution |

---

In this step the Consultant will review the SCA agreement and either electronically sign the SCA agreement by Take Action “**DocuSign**” or Take Action “**Revise**” to send back to the initiator for revisions, or Take Action “**Reassign Sig**” if they are the incorrect person at the firm to send back to Contract Admin to reassign the SCA.

Upon Take Action “DocuSign” the SCA will route back to either Campus or FPD based on the signing authority limits. Once the final execution by Campus or FPD occurs, the process will SPAWN the Commitment Approval process to update the project in eBuilder the integration to People Soft.

## Final Step |

---

Once the SPAWN is started, the Status of the SCA process is changed to “**Void**” and the process is complete.