



## **Subcontractor Approval 4.0 Estimator Review**

The purpose of this flow is to walk users in the Estimators group through reviewing a Subcontractor Approval record.

T2020TEST - Home

Tasks

Drafts

Notifications

Directory

Support

General

ADA Guidance ...

CC List

Contacts

Project Locations

Project Vendors

Project Numbe...

Project Inform...

Field Requi...

Project Co...

Project Esti...

Project Not...

Project Sch...

Project We...



DeDOT > DOTS > T2020TEST

Project E

STEP 1/26

Click the + symbol to open a new project

+ Create

	ation	Fiscal Year Obligated	Status	Creation Date	Creator	Record No.
		0.00	Active	04/02/2024 09:56 AM	Rose Coleman	PRJEST-0004
		0.00	Active	04/02/2024 09:48 AM	Cheryl DeGraff	PRJEST-0002
		0.00	Active	04/02/2024 09:55 AM	Rose Coleman	PRJEST-0003
	Construction Engineering Estimate	0.00	Active	04/01/2024 03:26 PM	Rose Coleman	PRJEST-0001

Total: 4

Self Help

Search by Name or Number...

**Recent Locations**

- T2020TEST
- T202400160
- TEST20221024
- T202201601
- T202304902
- T202304903
- T202466303
- T209901999
- T202366305
- T202301101
- T202300801
- T201609002
- TEST2019051200
- T201800402
- DeIDOT
- M&O
- T202003402
- T201607002
- T202207704
- T201707108

**Key Locations**

- Company Workspace
- DeIDOT

**Bookmarks**

No items to display.

STEP 2/26

Type the **Project Name** or **Number** or select from the **Recent Locations**

Click **Next** to proceed

**Next** →

				Record No.
<input type="checkbox"/>			Rose Coleman	PRJEST-0004
<input type="checkbox"/>	Active	04/02/2024 09:40 AM	Cheryl DeGraff	PRJEST-0002
<input type="checkbox"/>	Active	04/02/2024 09:55 AM	Rose Coleman	PRJEST-0003
<input type="checkbox"/>	Active	04/01/2024 03:26 PM	Rose Coleman	PRJEST-0001

Project Sch... 3

Project We...

Total: 4

Self Help

- TEST20221024 - Home
- Tasks
- Drafts
- Notifications
- Directory
- Support >
- General >
- Design Phase >
- Construction Phase**
- Document Manager >
- Reports >
- Admin >

DvIDGT > TEST20221024

### Subcontractor Approval

+ Create Actions Bulk Update View: All Records [edit] [refresh] [print] [search] [list] [refresh]

Record No.	Vendor Name	Vendor ID	Vendor Type	Contract No.	Status	Creator	Creation Date
------------	-------------	-----------	-------------	--------------	--------	---------	---------------

STEP 3/26

**Click Construction Phase**

Click *Next* if already open

← Back Next →

Total: 0

Self Help



- TEST20221024 - Home
- Tasks
- Drafts
- Notifications
- Directory
- Support
- General
- Design Phase
- Construction Phase
  - Field
  - Contract Admini...
  - Construction Ge...
- Document Manager
- Reports
- Admin

DelDOT > TEST20221024

### Subcontractor Approval

[+](#) Create
 [Actions](#)
[Bulk Update](#)
[View: All Records](#)
[Print](#)
[Search](#)
[Help](#)

Record No.	Vendor Name	Vendor ID	Vendor Type	Contract No.	Status	Creator	Creation Date
Total: 0							

STEP 4/26

**Click Contract Administration**

Click *Next* if already open

[← Back](#)
[Next →](#)

3

Self Help

- Notifications
- Directory
- Support
- General
- Design Phase
- Construction Phase
  - Field
  - Contract Admin...
  - Notice to P...
  - Contracts ...
  - Change Or...
  - Contractor'...
  - General Co...
  - Pencil Esti...
  - Progress Es...
  - Project Clo...
  - Price Appr...
  - Request for...
  - Subcontrac...**
  - Submittals
  - Time Charg...
  - Construction G...

### Subcontractor Approval

+ Create Actions Bulk Update View: All Records

Record No.	Vendor Name	Vendor ID	Vendor Type	Contract No.	Status	Creator	Creation Date
------------	-------------	-----------	-------------	--------------	--------	---------	---------------

Total: 0

STEP 5/26

**Click Subcontractor Approval**

Click Next of already open

← Back      Next →

Self Help

- Contract Administration
- Notice to Proceed
- Contracts - Summary
- Change Orders - Summary
- Contractor's Evaluation
- General Correspondence
- Pencil Estimate
- Progress Estimate
- Project Closeout
- Price Approvals
- Request for Information
- Subcontractor Approval**
- Submittals
- Time Charge Notices

DelDOT > DOTS > T2020TEST

## Subcontractor Approval

+ Create Actions Bulk Update View

STEP 6/26

**Double click** the applicable record.  
The status will be 'In\_Estimator\_Review'

← Back

Record No.	Vendor Name	Vendor ID	Contract No.	Status	Creator	Creation Date
SA-0005	ADS Construction S...	ADSCON	T2020TEST	In_Estimator_Review	Rose Coleman	06/26/2024 06:08 PM
SA-0004	A Del Construction ...	ADEL	T2020TEST	Revision_Required	Rose Coleman	05/23/2024 01:50 PM
SA-0003	Ackerman & Bayne...	ACKBAY	T2020TEST	Revision_Required	Rose Coleman	05/23/2024 10:29 AM
SA-0002			T2020TEST	In_Review	Rose Coleman	05/21/2024 03:00 PM
SA-0001	3-D Fabrication, Inc	3DFI	T2020TEST	In_Review	Rose Coleman	04/25/2024 02:50 PM

Total: 5

Self Help

Decline

More Actions

Accept

STEP 7/26

**Click Accept**

← Back

# Subcontractor Approval

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

## Task Details

From  
Rose Coleman

To  
Kyle Pickett;Rose Coleman;Estimators

Sent For  
Estimator Review

## Contract Info

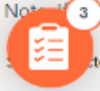
Contract Reference	Original Contract Amount
T2020TEST	8,847,777.00
	Revised Contract Amount
	8,970,271.39

## Subcontractor Record Type

Please choose one of the following:

- In Master List - the subcontractor exists in Unifier and needs to be added to the project.
- Add to Master List - the subcontractor DOES NOT exist in Unifier and needs to be added to both the master list and the project.

Not sure, please select In Master List and search for the vendor before selecting add to master list.



Attachments Comments

Unpublished Attachments

Name
Subcontractor Approval Bu...

Total: 1

Self Help



**Contract Info**

Contract Reference ⓘ  
T2020TEST

Original Contract An  
Revised Contract An

**Subcontractor Record Type**

Please choose one of the following:

1. In Master List - the subcontractor exists in Unifier and needs to be added to the project.
2. Add to Master List - the subcontractor DOES NOT exist in Unifier and needs to be added to both the master

Note: If unsure, please select in master and search for the vendor before selecting add to master list.

Subcontractor Record Type ⓘ

In Master List  Add to Master List

**CC Information**

CC List ⓘ

Type a CC List Name... Required

**Vendor Details**

Vendor \*  
ACKBAY

Vendor ID ⓘ  
ACKBAY

Vendor Name ⓘ  
Ackerman & Baynes LLC

Project Vendor Type ⓘ  
Sub-Contractor

DBE? ⓘ  
Yes

Third Tier Sub? ⓘ  
No

Second Tier Sub

Race Conscious ⓘ

Is Contract Attached?

Is FHWA 1273 Attached?

STEP 8/26

Review the subcontractor agreement and any additional documents attached to this record.

*If the business license and registry certificate within the Unifier Master Lists are valid, they are not required to be attached.*

Click Next to proceed

← Back Next →

Attachments ⓘ Comments Linked Records Linked Mail Workflow Progress Audit Log

Unpublished Attachments

Name	Title	Pub. No.	Rev. No.
BF list and associated Grou...			

Total: 1

Self Help

**Contract Info**

Contract Reference: T2020TEST Original Contract Amount: 8,847,777.00

Revised Contract Amount: 8,970,271.39

**CC Information**

CC List: ADA Guidance Request

**Subcontractor Record Type**

Please choose one of the following:

- In Master List - the subcontractor exists in Unifier and needs to be added to the project.
- Add to Master List - the subcontractor DOES NOT exist in Unifier and needs to be added to both the master list and the project.

Note: If unsure, please select in master and search for the vendor before selecting add to master list.

Subcontractor Record Type:  In Master List  Add to Master List

**Vendor Details**

Vendor: ACKBAY Vendor ID: ACKBAY

Vendor Name: Ackorman & Baynes LLC Project Vendor Type: Sub-Contractor

DBE?: Yes Third Tier Sub?: No

Race Conscious? Second Tier Sub:

STEP 9/26

Scroll and review the information entered by the Contractor and Project Manager

Click Next to proceed

← Back Next →

Total: 1

# Subcontractor Approval

Save Draft More Actions Send

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

ADS Construction Services Subcontractor

DBE?  Yes  No

Third Tier Sub?  Yes  No

Race Conscious

Second Tier Sub

Is Subcontract Attached?  Yes  No

Is FHWA 1273 Attached?  Yes  No

FHWA Participation

sams.gov Disbarment  Required

State Disbarment  Required

Remarks

3

Attachments Comments Linked Records Linked Mail Workflow Pr

Name	Title
Unpublished Attachments	
<input checked="" type="checkbox"/> Subcontractor Approval Bu...	

STEP 10/26

Select a response for sams.gov Disbarment

Click Next to proceed

← Back Next →

Total: 1

# Subcontractor Approval

Save Draft More Actions Send

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

DBE?

Third Tier Sub?

Race Conscious

Second Tier Sub

Is Subcontract Attached?  Yes  No

sams.gov Disbarment  Required

Is FHWA 1273 Attached?  Yes  No

State Disbarment  Required

FHWA Participation

**Remarks**

Remarks

**Case Information**

Attachments Comments Linked Records Linked Mail Workflow Pr

Name	Title
Unpublished Attachments	
<input checked="" type="checkbox"/> Subcontractor Approval Bu...	

**STEP 11/26**

Select a response for State Disbarment

Click Next to proceed

← Back Next →

Total: 1



Self Help

# Subcontractor Approval

Save Draft More Actions Send

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

Yes  No

Is FHWA 1273 Attached?

Yes  No

FHWA Participation

Assumed- Federally Funded, Non-PODI

## License Information

Business License No.

Business Lic. Expiration Date

Is Business License Attached?  Yes  No

Contractor Registry Certificate #

Certificate Expiration Date

Is Registry Certificate Attached?  Yes  No

## Remarks

Remarks



## Other Details

Attachments Comments Linked Records Linked Mail Workflow Pr

Unpublished Attachments
<input checked="" type="checkbox"/> FRED_1.0_Auto_Creation_fr...

STEP 12/26

**Review the License Information and provide updates as needed.**

Click Next to proceed

[← Back](#) [Next →](#)

Total: 1

Self Help

Subcontractor Approval **Bid Pay Items** Non-Bid Pay Items Address

STEP 13/26

Click **Bid Pay Items** to review any items added to this record

Business Lic. Expiration Date

05/24/2024

Is Business License Attached?

Yes  No

Contractor Registry Certificate #

547893

Certificate Expiration Date

05/30/2024

Is Registry Certificate Attached?

Yes  No

### Letter Details

Letter Non-Excluded ⓘ

0.00

Previous \$ Subcontracted ⓘ

0.00

% of Contract Subcontracted ⓘ

0

Letter Excluded Amount

0.00

Previous Excluded Amount

0.00

Total Excluded Amount

0.00

Total \$ Subcontracted

0.00

Letter Details ⓘ



Attachments Comments Linked Records Linked Mail Workflow Progress Audit Log

📎

<input checked="" type="checkbox"/>	Name	Title	Pub. No.	Rev. No.
Unpublished Attachments				
<input checked="" type="checkbox"/>	BP list and associated Group...			

Self Help

Total: 1



No.	Pay Item	Section	Pay Item Name	Agreement Quantity	Agreement Unit Price	Item Subtotal
001				0	0.00	0.00



**STEP 14/26**

Review the **Bid Pay items** to ensure the information added is correct.

*If revisions are needed, a comment can be left later in this flow and the record can be sent for revisions.*

Click **Next** to proceed

**Next** →

 Exclude?

### Item Details

Agreement UOM	Unit of Measure
Agreement Quantity	Quantity
Agreement Unit Price	Item Unit Cost
Item Subtotal	

### Comments

Remarks



No.	Agreement Quantity	Agreement Unit Price	Item Subtotal
001	0	0.00	0.00

STEP 15/26

Click **Non-Bid Pay Items** to review the items that were added to this record

**General**

Pay Item Number

Pay Item Name

Pay Item

Section

Exclude?

**Item Details**

Agreement UOM	Unit of Measure
Agreement Quantity	Quantity
Agreement Unit Price	Item Unit Cost
Item Subtotal	

**Comments**

Remarks



Self Help





No.	Non-bid Pay Item - Suffix	Existing Section	Existing Pay Item Name	Existing Pay Item Desc	Existing UOM	Agreement Quantity	Agreement Unit Pr
-----	---------------------------	------------------	------------------------	------------------------	--------------	--------------------	-------------------



STEP 16/26

Review the **Non-Bid Pay items** to ensure the information added is correct.

*If revisions are needed, a comment can be left later in this flow and the record can be sent for revisions.*

**Next** →



Information  
No line items are available.





STEP 17/26  
Click **Address** to review the addresses provided

No.	Non-bid Pay Item Suffix	Existing UOM	Agreement Quantity	Agreement Unit Pr
-----	-------------------------	--------------	--------------------	-------------------

Self Help

**i**  
Information  
No line items are available.



No.	Address 1	Address 2	City	State/Province
001	4211 Erdman Avenue		Baltimore	MD



**STEP 18/26**

Review the addresses provided and make updates, as needed

Click Next to proceed

**Next** →



**Contact Details**

First Name	<input type="text"/>	Last Name	<input type="text"/>
Title	<input type="text"/>	Email	<input type="text"/>
Mobile Phone	<input type="text"/>	Work Phone	<input type="text"/>

STEP 19/26

Pay Item Name	Agreement Quantity	Agreement Unit Price	Item Subtotal
	0	0.00	0.00

Click **Subcontractor Approval** to return to the upper form

**General**

Pay Item Number

Pay Item Name

Pay Item

Section

Exclude?

**Item Details**

Agreement UOM	Unit of Measure
Agreement Quantity	Quantity
Agreement Unit Price	Item Unit Cost
Item Subtotal	

**Comments**

Remarks



Self Help

## Remarks

Remarks

## Letter Details

Letter Non Excluded

Previous \$ Subcontracted

Previous \$ Subcontracted

% of Contract Subcontracted

Letter Excluded Amount

Previous Excluded Amount

Total Excluded Amount

Total \$ Subcontracted

Letter Details

## Record Information

## Print Only

Attachments

Comments

Linked Records

Linked Mail

Workflow Progress

Audit Log

STEP 20/26

Click **Comments** if additional information is needed on this record, or if the record should be sent back to the record creator for revisions.

Click **Next** if no comments are needed. Clicking Next will move this flow to the next step.

[← Back](#)

[Next →](#)

Title Pub. No. Rev. No.

Self Help

Total: 1

**Remarks**

Remarks

STEP 21/26

Add a detailed comment listing the required changes, then click **Post**

Click *Next* to proceed

← Back Next →

**Letter Details**

Letter Non-Excluded ⓘ

Previous \$ Subcontracted ⓘ

% of Contract Subcontracted ⓘ

Letter Excluded Amount

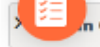
Previous Excluded Amount

Total Excluded Amount

Total \$ Subcontracted

Letter Details ⓘ

**Record Information**



Information  
No Comments are available.

# Subcontractor Approval

Save Draft More Actions Send

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

% of Contract Subcontracted 0

Letter Excluded Amount 0.00

Previous Excluded Amount 0.00

Total Excluded Amount 0.00

Total \$ Subcontracted 0.00

STEP 22/26

Select the **Letter Date**

Click *Next* to proceed

← Back Next →

Letter Date \*

MM/DD/YYYY

Required

Letter Details

Record Information 3

Print Only

Attachments Comments Linked Records Linked Mail Workflow Pr

Name	Title
Unpublished Attachments	
FRED_1_0_Auto_Creation_fr...	

Self Help

Total: 1

# Subcontractor Approval

Save Draft More Actions Send

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

% of Contract Subcontracted 0

Letter Excluded Amount 0.00

Previous Excluded Amount 0.00

Total Excluded Amount 0.00

Total \$ Subcontracted 0.00

Letter Date \* MM/DD/YYYY Required

STEP 23/26

Add Letter Details, as needed, then click Next to proceed

Click Next to proceed

← Back Next →

Letter Details

- Record Information
- ... Only

Attachments Comments Linked Records Linked Mail Workflow Pr

Name	Title
Unpublished Attachments	
FRED_1_0_Auto_Creation_fr...	

Total: 1

Self Help



# Subcontractor Approval

Save Draft More Actions **Send**

Subcontractor Approval Bid Pay Items Non-Bid Pay Items **Address**

Grid toolbar: Add, Actions, Refresh, Print, Search, Filter

No.	Address 1	Address 2	City	State/Province
001	4211 Erdman Avenue		Baltimore	MD



Line Item Details Attachments Linked R

STEP 24/26  
**Click Send**  
← Back

Address 1 \*  
4211 Erdman Avenue

Address 2

State/Province \*  
MD

Address 3

Zip Code \*  
21213

**Contact Details**

First Name

Last Name

Title

Email

Mobile Phone

Work Phone

Self Help

Cancel Save Save & Add New

# Subcontractor Approval

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

No.	Address 1	Address 2	City	State/Pre
001	4211 Erdman Avenue		Baltimore	MD

### Workflow Action Details

▼ Action Details

Workflow Actions \* Send For

Select

Cancel Send

STEP 25/26

Select the applicable **Workflow Action**

Click **Next** to proceed

**Next** →

MD

Zip Code \*

21213

details

Last Name

Email

Work Phone

Cancel Save Save & Add New



Self Help

No.	Address 1	Address 2	City	State/Pro
001	4211 Erdman Avenue		Baltimore	MD

### Workflow Action Details

Workflow Actions: **Submit** Send For: Estimator Review

To: [Kyle Pickett](#) Estimators

Due Date Details

Task Due Date

**i**  
Task Due Date is not available

Cancel Send

Save Draft More Actions Send

Attachments Linked Records

City: Baltimore

State/Province: MD

Zip Code: 21213

Self Help

Details

Last Name:

Email:

Work Phone:

Cancel Save Save & Add New

STEP 26/26

Click **Send**

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No.	Address 1	Address 2	City	State/Pr
101	4311 Indian Avenue		Baltimore	MD

### Workflow Action Details

Workflow Actions: Submit

Send For: Estimator Review

To: Kyle Pickett@estimators

Task Due Date

**i**  
Task Due Date is not available

Cancel Send

Attachments Linked Records

City: Baltimore


State/Province: MD

Zip Code: 21213

Last Name

Email

Work Phone

powered by 

You have completed this task.