

## eBuilder User Guide

# 20.10 Standard Consultant Agreement Process

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



This process is used to initiate, route, and create the Standard Consultant Agreement for review, approvals, and electronic signatures. As you do today, you'll need the proposal information to start this process. In addition, when requesting the proposal, also request the consultant's proof of insurance up front. This information is used earlier in the process.

Standard Consultant Agreement Workflow Process



#### Initiation/Start Step

Just as the project manager does today to complete the Agreement Request Form, the PM will initiation the Standard Consultant Agreement (SCA) process in eBuilder and enter the information in the page layout as opposed to the Agreement Request Form

### Commitment Others Commitment Custom Fields:

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



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 ConsultantG ste)-2h state a) 20 as (a) 20 as (b) (a) 20 as (a) 20 a

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 Schedule and Scope:

	Project Schedule and Scope	~
	Mail (1) Mail	project budget Construction Amoun
		matic Design Phase
	to Owner: Design Development Phase Complete: Submit CD Review Documents to Owner: Construction Documents	
	Advertising: Bid Opening:	
Complete the following section just as	Number of SD Review Copies Electronic Required: Number of DD Review Copies Electronic Required: Number of CD Review Copies Electronic Required: Number of CD Review Copies Electronic	
the ARF form.	Agreement Amount Consultant's Fee Description:	
	Life Cycle Cort Studier.500-00 20199-00-00 Alternate System	rs Required
X	Restrict Dreating and Section Restrict Dreating and Section Restrict Dreating and Section Dreating and Section Restrict Dreating and Section Restrict Dreating and Section Restrict Dreating and Section Projection Projection Projection Restrict Dreating and Section Projection Projection Restrict Dreating Projection Proj	

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.

#### ContractAdministration 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 revon 0.009 w ant the kwul4 skin in r

Consultant s Hourly Rate Schedule:

Contract Admin: Agreement Routing In this step the SCA agreement is being prepped for electronic signature