

CMS changes effective summer 2012

Consultant Services new “features” and improvements in CMS

1- Consultant Docs / Negotiation / Contract Prep

- New **Alternate Staffing Plans** do not require a traditional contract modification. These will be required for all contracts, regardless of fee type.
 - **New Contracts** – from the “Overview” on Screen 914, you will find a new button “Alternate Staff”. Add staff to the contract with no hours. These individuals must be accepted or rejected by the UDOT PM in “Negotiations”. Once an individual has been rejected by a UDOT PM, they can not be added to the contract at a later time. Accepted staff will be allowed to work on a contract when the new contract has been executed. Alternate Staff will not change the overall contract amount and use of Alternate Staff must be absorbed in the “not to exceed” amount of the executed contract.
 - **Executed Contracts** – from the “executed” contract, you will find a new button “Alternate Staff”. Add staff to the contract with no hours. These individuals must be accepted or rejected by the UDOT PM in “Negotiations”. Once an individual has been rejected by a UDOT PM, they can not be added to the contract at a later time. An email will be distributed to the Consultant after the Alternate Staff have been approved in CMS. Consultants will also be able to check the approval status from the Alternate Staff page in the contract. Alternate Staff will not change the overall contract amount and use of Alternate Staff must be absorbed in the “not to exceed” amount of the executed contract.
 - Alternate staff are subject to **Central Construction certification** for their proposed role on the project, just as staff identified on the Staffing Plan. CEM contracts will undergo a secondary review for CEMT, IQP, Partnering, TTQP and LQP by UDOT Consultant Services contract administrators and Central Construction and Materials before approval is complete.
 - Alternate Staffing Plans will be printed along with the Staffing Plan and inserted into the contract or contract modification. Alternate Staffing Plans on executed contracts will no longer be presented to the UDOT Comptroller’s office, but are available for review by the Comptroller and Internal Audit divisions.

Oracle Developer Forms Runtime - Web

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

ePM914 Consultant Documents Maintenance (v 1.0) 27-JUN-2012 14:57:16

CMS Consultant Documents

PIN 9693 SR-154; 13800 Junction to I-15 Thin Overlay On-Call DOCUMENT PREP Fee Type/Overhead
 Project F-0154(69)0 Location SR-154; MP .00 to MP .47 Submit to UDOT-PM
 Contract No. Contract Description RECORDED TRAINING1 Negotiation Comments
 Act As Prime Return to Status
 Go to Maintenance

Prime Firm EXAMPLE COMPANY Activities Hours Fee Type Fixed Fee % Fringe G&A Total OH 150.00
 Current Firm Name EXAMPLE COMPANY 7 0 COST PLUS FIXED FEE 10.00 50.00 100.00
 FS Effective Date 05/31/2012 FS Expiration Date 05/31/2013

Overview

Completed

Project Team Assign Sub Activities
 Work Plan/Hours Derivation Alternate Staff (circled)
 Other Direct Cost Items Print Cost Proposal
 Executive Summary Print All
 Insurance Status

Current Firm Subs Cost				Current Firm Contract Cost		
Subs Direct Labor Cost	.00	Direct Labor Cost	.00			
Subs Overhead Cost	.00	Overhead Cost	.00			
Subs Fixed Fee Cost	.00	Fixed Fee Cost	.00			
Subs Other Direct Cost	.00	Other Direct Cost	.00			
		Subs Cost	.00			
Subs Total Transaction Cost	.00	Total Transaction Cost	.00			

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

Record: 1/1 <OSC>

- **Identification of Consultant Key Staff** – Consultants and UDOT PMs can identify those individuals who cannot be changed out of a contract by using a new tab in the “Work Plan / Hour Derivation” button in the “Overview” section of Consultant Docs.

Oracle Developer Forms Runtime - Web

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

ePM914 Consultant Documents Maintenance (v 1.0) 27-JUN-2012 16:35:37

CMS Consultant Documents

PIN 9693 SR-154; 13800 Junction to I-15 Thin Overlay On-Call DOCUMENT PREP Fee Type/Overhead
 Project F-0154(69)0 Location SR-154; MP .00 to MP .47 Submit to UDOT-PM
 Contract No. Contract Description RECORDED TRAINING1 Negotiation Comments
 Act As Prime Return to Status
 Go to Maintenance

Prime Firm EXAMPLE COMPANY Activities Hours Fee Type Fixed Fee % Fringe G&A
 Work Plan Hours Derivation **Key People** (circled) Back to Overview

Employee Name	Contract Job Title	Key Person
		<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>

- We have made a modification to **ODC Items** in contracts. Consultants may now use partial quantity increments, i.e. .5.

2- Screen 915 (Contract Status)

- Consultants and UDOT PMs can now **sort transactions** in the Status and Search screens. Columns with button headers can be sorted. Click once to sort ascending; click a second time to sort descending.

CMS Contract Search

Search filters: PIN, Project, Location, Contract, Federal ID (999999444), Firm Name (EXAMPLE COMPANY). Buttons: Return to Status, Clear Search.

Request Date	PIN	Contract	Mod	Prime Firm	Project Location	UDOT Contact	On Call	Status	OBIARRA
06/12/2012	9693			EXAMPLE COMPANY	SR-154; MP .00 to MP .47	Ritchie Taylor	N	NEGOTIATION	N
06/12/2012	9693			EXAMPLE COMPANY	SR-154; MP .00 to MP .47	Ritchie Taylor	N	DOCUMENT PREP	N

Buttons: Toggle Display, Print Summary. Record: 1/2. <OSC>

- From the Search screen, selections can be viewed and then the viewer can **return to the requested search**. Click the “Clear Search” button for a new search.

CMS Consultant Documents

Search filters: PIN (9693), Project (SR-154; 13800 Junction to I-15 Thin Overlay), Location (SR-154; MP .00 to MP .47), Contract No., Contract Description (RECORDED TRAINING1). Buttons: DOCUMENT PREP, Submit to UDOT PM, Negotiation Comments, Act As Prime, Return to Search, Go to Maintenance.

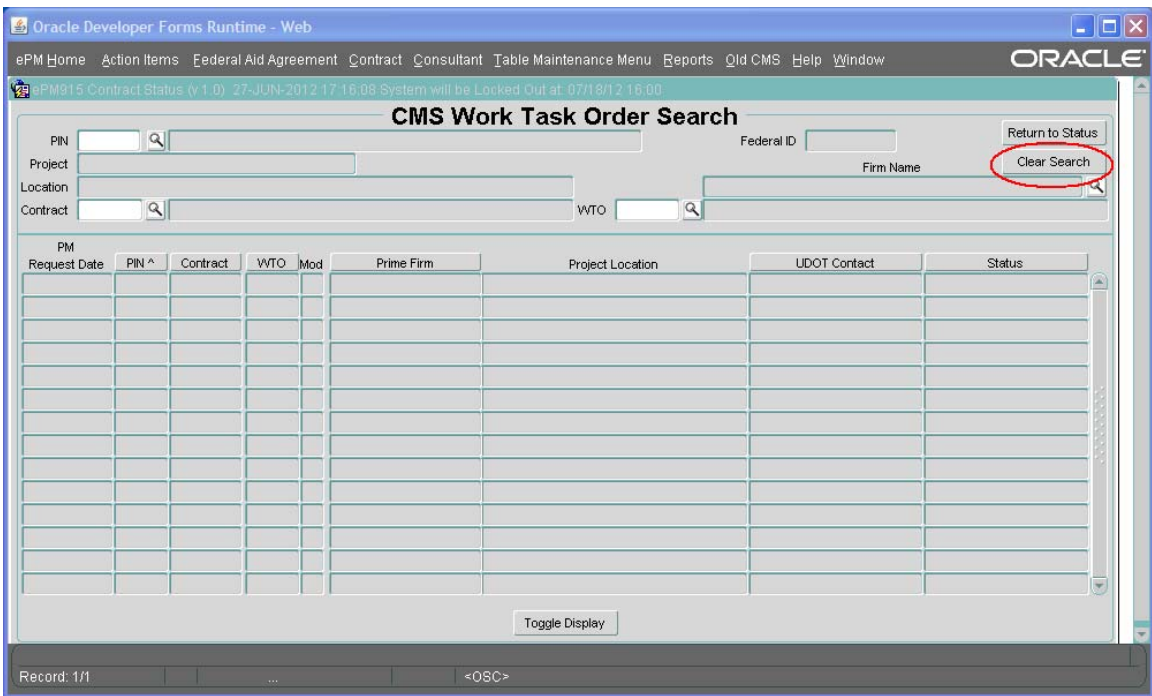
Prime Firm: EXAMPLE COMPANY. Activities: 7, Hours: 0, Fee Type: COST PLUS FIXED FEE, Fixed Fee %: 10.00, Fringe: 50.00, G&A: 100.00, Total OH: 150.00.

FS Effective Date: 05/31/2012, FS Expiration Date: 05/31/2013.

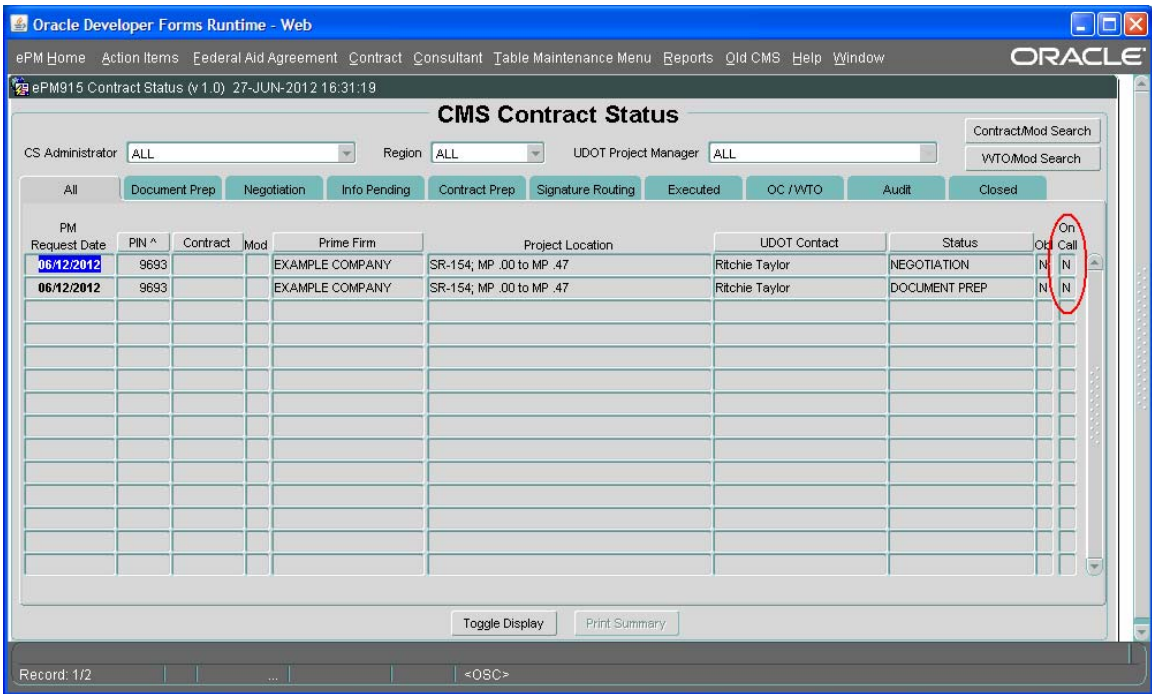
Overview

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

Record: 1/1. <OSC>



- On-Call contracts can easily be identified on the Status screen.

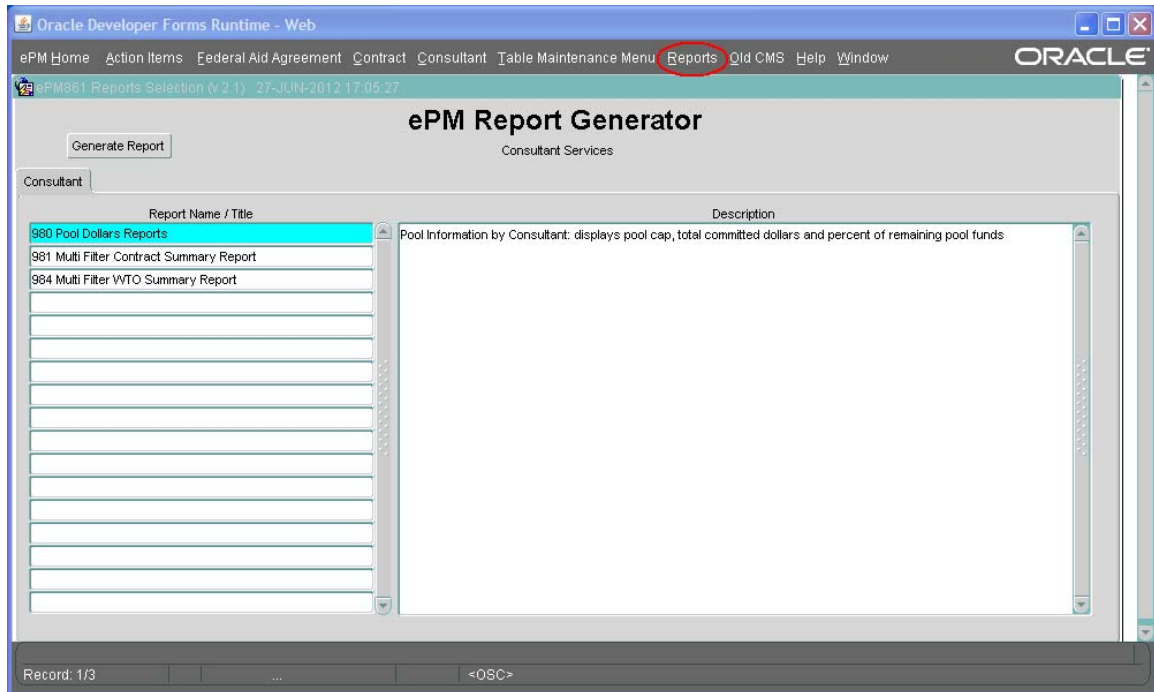


- Current expense and On-Call contract transactions can now be searched by PIN (previously they could only be searched by contract number).

3- General changes

- Over the last several months we have changed entry of the Consultant PM from a free form to using the **employee user ID** to populate a drop-down list. Now the consultant employee must have an ePM log-in in order to be assigned to any contracts. This change allows Consultants to filter workloads from the firm level down to specific individuals.
- **E-mail notifications** have increased. CMS is providing email notifications to the UDOT primary and secondary contacts, the Consultant PM, the Local Government contact, Program Finance, and the Consultant Services contract administrator each time there is a change in the contract or WTO status. If you generate the change in status, you will not get the email. If you feel you are not getting email messages at appropriate times, please contact someone at Consultant Services to follow up.
- **Consultant and sub-consultant** are required to meet the following **criteria in order to be selected** for a contract in CMS: 1) prime and sub-consultant firms must have a current financial screening, or be set up in CMS to be used as contracted labor (short form); 2) prime firms must have current insurance certificates on file with Consultant Services; 3) for Pool Direct Select or RPLOQ selection, the prime firm must be qualified in the appropriate Pool discipline; 4) for Pool Direct Select or RPLOQ selection, the prime firm must have 125% of the UDOT PM's ICE amount available for a new contract; and 5) all firms must meet independent audit or health insurance certification requirements for contracts exceeding established dollar thresholds. If all of these criteria are not met, the firm is not eligible for the contract requested and will not be included in the consultant drop-down lists for selection.
- In addition to the **expiration letters** mailed to consultants when a Financial Screening or insurance policy is going to expire, Consultants will now receive an email notification, too. These notifications will be sent to both the Financial and Contract contacts identified in Screen 930. It is important for consultants to keep these contacts updated to ensure delivery of these important messages. Questions should be directed to the Consultant Services Financial Screener.
- A new **network** of activities has been created **for Construction Engineering Management**. UDOT PM's will need to set up the network for their PINs in the ePM screen 220 before the network can be used to create an ICE and be used on a contract. Please contact Consultant Services staff for any questions.

- The following **WTO information** is now available: 1) WTO Search (915) functions the same as the contract search (by PIN, contract, WTO and consultant); 2) CMS Form 984 is a multi-filter report and can be accessed from the “Reports” item on the main menu.



4- Printing

- **WTO's can be printed** by the consultant when the transaction is in Doc Prep or after the WTO has been executed. After execution, the printed form identifies approvers and dates.
- **Contract documents can be printed** by a consultant when the transaction is in Doc Prep (may make internal contract review easier before submitting the transaction to the UDOT PM). Documents can be printed all at once or individually from the entry screens (Cost Proposal from “Overview” and Executive Summary, Work Plan, Staffing Plan, and Hour Derivation from their forms). We have identified issues with some users having a Windows 7 operating system. Should you be one of these users, please contact Consultant Services for specific assistance.

Oracle Developer Forms Runtime - Web

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

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ePM914 Consultant Documents Maintenance (v.1.0) 27-JUN-2012 17:31:45

CMS Consultant Documents

PIN 9693 SR-154; 13800 Junction to I-15 Thin Overlay On-Call DOCUMENT PREP

Project F-0154(69)0 Location SR-154; MP .00 to MP .47

Contract No. Contract Description RECORDED TRAINING1

Prime Firm EXAMPLE COMPANY Activities Hours Fee Type Fixed Fee % Fringe G&A

Current Firm Name EXAMPLE COMPANY 7 0 COST PLUS FIXED FEE 10.00 50.00 100.00 Total OH 150.00

FS Effective Date 05/31/2012 FS Expiration Date 05/31/2013

Fee Type/Overhead
Submit to UDOT-PM
Negotiation Comments
Return to Status
Go to Maintenance

Overview

Completed

Project Team Assign Prime Activities

Work Plan/Hours Derivation Assign Sub Activities

Other Direct Cost Items Alternate Staff

Executive Summary Print Cost Proposal

Insurance Status **Print All**

Current Firm Subs Cost		Current Firm Contract Cost	
Subs Direct Labor Cost	.00	Direct Labor Cost	.00
Subs Overhead Cost	.00	Overhead Cost	.00
Subs Fixed Fee Cost	.00	Fixed Fee Cost	.00
Subs Other Direct Cost	.00	Other Direct Cost	.00
		Subs Cost	.00
Subs Total Transaction Cost	.00	Total Transaction Cost	.00

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

Record: 1/1 ... <OSC>

- **Date Extensions** can be generated by either the consultant or the UDOT PM from Screen 910 in CMS. Initiate the request; complete the necessary fields; save; the form will generate; print and sign or use an e-token to sign electronically; send on for additional signatures; then forward to the Consultant Services contract administrator for completion. Should you encounter problems with the form not generating, see the print note above or contact Consultant Services.

Oracle Developer Forms Runtime - Web

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

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ePM910 Contract Request (v.1.0) 27-JUN-2012 17:38:39

CMS Contract/Mod Request

RFQ Date Extension Only Mod Pool / EOR Date Extension Only Mod

Save

PIN

Project Project Value

Location

Contract Contract Description

Cumulative Contract Amount Contract Amount Pending

Record: 1/1 ... <OSC>

5- CMS Training

- Consultant Services will discontinue regular live **CMS Training** sessions after July 12, 2012. Consultant Services has recorded short Adobe sessions and posted them on our webpage at www.udot.utah.gov/go/cmstraining.
- Current **video links** as of June 30th include:
 - For Consultant Administrators
 - Managing the Employee Master List
 - Managing your ODC Item Master List
 - Managing your Consultant Security
 - How to copy ODC items for a new Financial Screening
 - For Consultant Project Managers
 - How to add employees, ODC Items and sub-consultants in Consultant Doc Prep in CMS
 - How to request Alternate Staffing Plans for an executed contract
 - How to request Alternate Staff in an original contract in Doc Prep
 - For UDOT Project Managers
 - How to request a contract and complete an ICE in CMS
 - General Rules for On-Call contracts and WTO's
 - Other sessions will be posted in July 2012.
- Consultant Services will provide **one-on-one training** for firms or individuals needing to become familiar with CMS or desiring a refresher. Please contact any of the Consultant Services staff to make arrangements.

6- Consultant Services Staff

- ★ Gaye Hettrick – Consultant Services Manager
ghettrick@utah.gov 801/965-4639
- ★ Rae Sanchez – RFQ Contract Administrator
raeleen@utah.gov 801/965-4183
- ★ Mike Hanni – Financial Screener
mikehanni@utah.gov 801/965-4138
- ★ Cali Bastow – Pool Contract Administrator
cbastow@utah.gov 801/965-4274
- ★ Michael Butler – Local Government Pool Contract Administrator
michaelbutler@utah.gov 801/965-4419
- ★ Philip Ellsworth – Alternative Delivery Contract Administrator
pellsworth@utah.gov 801/957-8681