Purpose:

The purpose of this Standard Operating Procedure is to outline how we request, review, and file subcontractor prequalification forms.

Procedure:

1) Subcontractors should be prequalified prior to inviting to bid and/or included in a proposal estimate.
   A) Exception – If we have a long and good history of working with a quality subcontractor that has never completed a prequalification form. Confirm with head of preconstruction department.
   B) Exception – If in a bid situation we receive a bid from a subcontractor that has not completed a prequalification form. If the scope of work is complete, discuss using the subcontractor with the head of preconstruction (who will likely contact the subcontractor and then decide for use in bid).

Adding a subcontractor to the database and sending a prequalification form:

2) Smart Bid is our invitation to bid (ITB) software, and the means for producing prequalification forms. The following steps are all related to Smart Bid.
   A) From home screen select Companies > Add Company
   B) Complete all information and select "Add Company."
      i) *NOTE* If this is an out-of-town subcontractor that works in Nashville (example – a subcontractor that travels to do hospitality work) use "37204" as the zip code. When creating ITBs, Smart Bid uses company location as a filter.
   C) From the Location Information screen:
      i) Change "Qualification" to "Invited for Pre-Qual"
      ii) Change "My Rating" to include two (2) stars.
      iii) Open the contact that will receive the prequalification form and select "Prequal Recipient."
   D) Select "Save
3) Select "Send Communication" from the top right corner of the information page.
4) Select "Prequal Request."
5) Select the contact, and from the "Select Prequal" pull-down menu selects "Subcontractor Prequalification 2017."
6) Select "send"

Reviewing and filing subcontractor prequalification forms:

1) From the Smart Bid dashboard select "Updates" on the right side of the page.
2) Submitted prequalification forms will be listed as an unread
3) Select a submitted prequalification form.
4) Select "Generate PDF"
5) Select "All Sections"
6) Select "Download PDF file"
7) Save the prequalification by scope and company name (example – 02B Jones Brothers)
   a) Save in P: Shared > Estimating > Prequalification Forms > 02 Need Review

8) A review of each prequalification form should be performed by the head of the preconstruction department.
9) Once Reviewed:
   a) Subs that are not qualified
      i) Move prequalification form to “03 Not Prequalified.”
      ii) Change their qualification status in Smart Bid to “Not Qualified.”
      iii) Change “My Rating” – deselect existing rating and then select a single star.
   b) Subs that are qualified:
      i) Move prequalification form to “01 Prequalified”
      ii) Change their qualification status in Smart Bid to “Pre-Qualified”
      iv) Change “My Rating” – deselect existing rating and then select either three- or four-star rating.