



FACILITIES MANAGEMENT BUSINESS DEPARTMENT

CONTRACTING GUIDELINES

Created By: Ericka A. Thomas, Facilities Contracting Officer

GENERAL OVERVIEW

GEORGIA TECH (GT) FACILITIES MANAGEMENT DESIGN & CONSTRUCTION (D&C) DEPARTMENT

- Responsible for providing architectural and engineering design, construction management and contracting services for large and small campus projects.
- Projects are usually accomplished by outside contractors and managed by our in-house Project Managers

GT FACILITIES MANAGEMENT BUSINESS (ACCOUNTING) DEPARTMENT

- Serves as the chief budgetary office for all GT Facilities Management construction/design projects
- Responsible for all construction/design accounting transactions, including
 - Project Request
 - Purchase Order for Materials
 - Contract Administration
 - D&C Fee Billing
 - Invoice Processing
 - Project Budget Reconciliation

ROLE OF FACILITIES CONTRACTING OFFICERS

- Review contracts to ensure appropriate forms were used and approval signatures are present
- Check AiM Project Number and budget for accuracy
- Ensure contractor is listed in BuzzMart
- Check e-Verify status
- Verify if insurance limits meet Board of Regents (BOR) Requirements
- Assign Contract Number
- Encumber funds for contract
- Issue “Notice to Proceed”
- Enter contract information into AiM
- Process contract change orders, amendments & contract Invoices
- Closeout projects in AiM

CONTRACTING REQUIREMENTS/ FORMS OF CONTRACT

NEW CONTRACTOR REQUIREMENTS CHECKLIST

- Vendor Profile Form
- Current Certificate of Insurance
- E-Verify/ Immigration Affidavit
- Contractor Safety Performance Expectations Form

GT VENDOR PROFILE FORM

- Required to encumber funds & pay invoices for a project
- Must be updated every (3) years
- Found on GT Procurement & Business Services website at <https://vpa.procurement.gatech.edu/>
- For additional information or assistance, contact vendor.help@business.gatech.edu

***** Contractors may sign up for electronic payments at <http://www.paymode.com/gatech> *****

BOR CERTIFICATE OF INSURANCE REQUIREMENTS

	CONSTRUCTION	DESIGN	PROFESSIONAL SERVICES (GENERAL CONSULTANT)
Commercial General Liability	\$1M per occurrence \$2M aggregate	\$1M per occurrence	\$1M per occurrence \$2M aggregate
Automobile Liability	\$1M per occurrence	\$100K per occurrence for bodily injury	\$1M per occurrence
Umbrella Liability	<u>Contract Value < \$5M</u> - \$2M per occurrence - \$4M aggregate <u>Contract Value > \$5M</u> - \$2M per occurrence - \$10M aggregate	N/A	\$2M per occurrence
Workers Compensation	Employer's Liability- \$1M per occurrence	Employer's Liability- \$1M per occurrence	Employer's Liability- \$1M per occurrence
Professional Liability	N/A	Depends on Construction Cost	Depends on Construction Cost

***** Required for ALL contractors*****

COI documents can be found on the GT Facilities Website- www.facilities.gatech.edu under "Administration" Tab (Standard Forms & Templates)

E-VERIFY (IMMIGRATION & SECURITY FORM)

- Required for **ALL** contractors who provide services greater than **\$2,499.00**
- The **orange asterisk icon** (*) identifies vendors in BuzzMart with active e-Verify status
- E-Verify **must be** updated annually (expiration date is based on the notarized date on form)

Supplier Information

AVS Builders Inc * [more info...](#)
[select different supplier](#)

315 Marshy Pointe Suite 100: (preferred)
315 Marshy Pointe Suite 100
Johns Creek, GA 30097 US



IMMIGRATION AND SECURITY FORM (GEORGIA SECURITY AND IMMIGRATION COMPLIANCE ACT AFFIDAVIT)

Contractor's Name:	
State Entity's Name:	Board of Regents by and on behalf of the Georgia Institute of Technology
State Solicitation/ Contract No.:	

CONTRACTOR AFFIDAVIT

By executing this affidavit, the undersigned Contractor verifies its compliance with O.C.G.A. §13-10-91, stating affirmatively that the Contractor identified above has registered with and is participating in a federal work authorization program*, in accordance with the applicability provisions and deadlines established in O.C.G.A. 13-10-91.

The undersigned further agrees that, should it employ or contract with any subcontractor(s) in connection with the physical performance of services pursuant to this contract with the State Entity, Contractor will secure from such subcontractor(s) similar verification of compliance with O.C.G.A. § 13-10-91 on the attached Subcontractor Affidavit. Contractor further agrees to maintain records of such compliance and provide a copy of each such verification to the State Entity at the time the subcontractor(s) is retained to perform such service.

EEV / E-Verify™ Company Identification Number

BY: Authorized Officer or Agent
(Contractor Name)

Date

Title of Authorized Officer or Agent of Contractor

Printed Name of Authorized Officer or Agent

SUBSCRIBED AND SWORN
BEFORE ME ON THIS THE

____ DAY OF _____, 20__

Notary Public

[NOTARY SEAL]

My Commission Expires:

*any of the electronic verification of work authorization programs operated by the United States Department of Homeland Security or any equivalent federal work authorization program operated by the United States Department of Homeland Security to verify information of newly hired employees, pursuant to the Immigration Reform and Control Act of 1986 (IRCA), P.L. 99-603

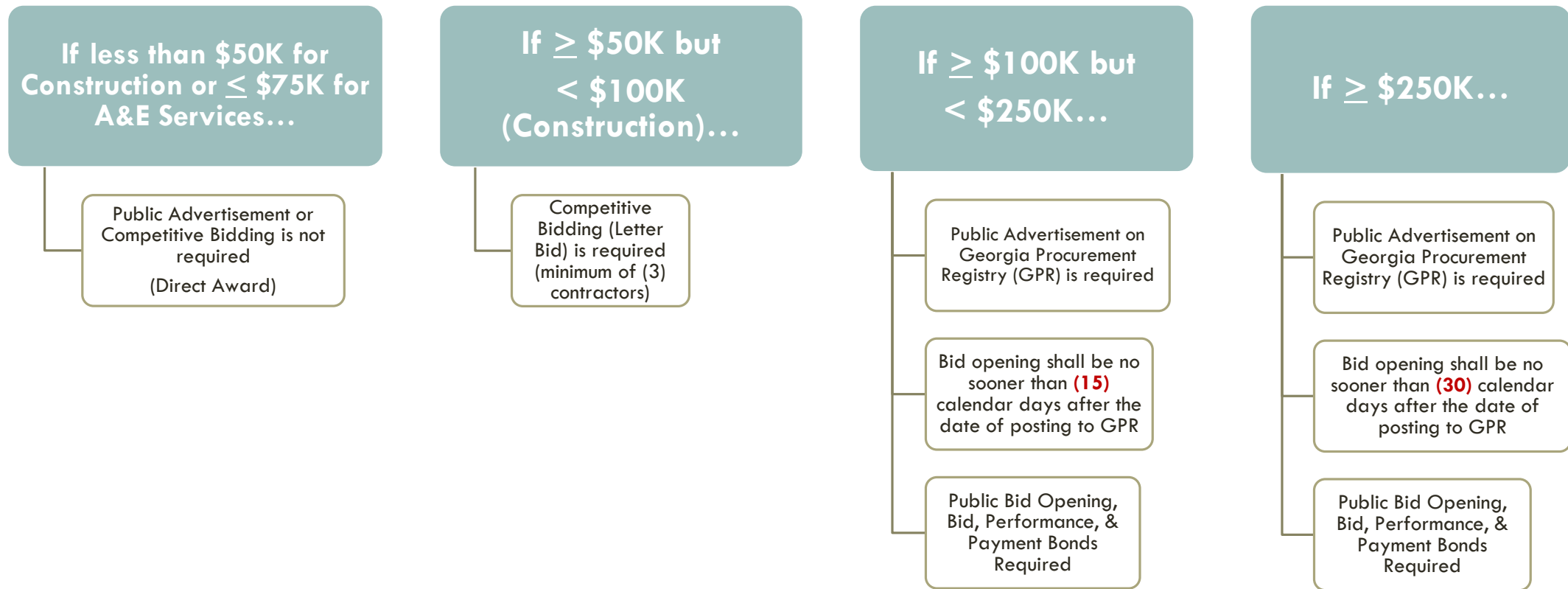
CONTRACTOR SAFETY PERFORMANCE EXPECTATIONS FORM

- Required for **ALL** general contractors/subcontractors
- Must be updated annually
- Maintained electronically by GT Facilities Management Business Office

Progressive Disciplinary Action for Violation of Safety Rules:

- 1st Violation – Written Warning/Letter in Project File
- 2nd Violation – Work stoppage at contractor's expense; pending investigation
- Immediately Dangerous to Life & Health (IDLH)/Extreme Violation: Contractor may be suspended at contractor's expense. Contractor may be barred from future Georgia Tech projects

BID & ADVERTISING REQUIREMENTS BASED ON CONSTRUCTION/DESIGN COST



*** **ALL construction contracts require labor** ***

Contracting documents can be found on the GT Facilities Website- www.facilities.gatech.edu under “Administration” Tab (Standard Forms & Templates)

DIRECT AWARDS

- Less than \$50K for Construction or \leq \$75K for A&E Services
- Supporting Documentation
 - Construction Project – Proposal/Quote
 - Professional Services– General Consultant Contract
 - Design Services – Design Professional Contract

***** ALL construction contracts require labor *****

Contracting documents can be found on the GT Facilities Website- www.facilities.gatech.edu under “Administration” Tab (Standard Forms & Templates)

LETTER BID

- Construction Projects (\$50,000 - \$99,999.99)
- Documentation Required:
 - Contract Title
 - Estimated Project Value
 - Project Manager
 - AiM Project No.
 - Drawings, Specs
 - Minimum of (3) Contractors
 - Site Visit Information
 - Sealed Bids Due Date (**except** weekends, Monday, a legal holiday, or day after legal holiday)

Note: If AIM Project Budget \leq \$200K – submit request to Ericka Thomas at ericka.thomas@facilities.gatech.edu

If AIM Project Budget $>$ \$200K – submit request to Donna Vongsouvan at donna.vongsouvan@facilities.gatech.edu

LETTER BID REQUEST FORM
(For Projects \$50,000.00 - \$99,999.99)

Requestor: Glen Hickman Date: 1-15-16

Project Information:

Contract Title: #191 - North Ave. Apartments - East Building ("B") Data Cabling

Estimated Total Project Value: \$99,999.00 AiM #: 0029-2016 Contract #:

Attachments: Drawings and Invitation to Bid (Drawings, Specs, etc.)

LETTER BID – Please invite the following:

Contractor #01:

Company Name: Communication Cabling Specialists

POC: Wade Wilkerson

Email: wadeccs.att.net

Contractor #02:

Company Name: Comtran Group

POC: Bob Porter

Email: bobporter@comtrangroup.com

Contractor #03:

Company Name: Steve Thompson

POC: Steve Thompson

Email: sthompson@aol.com

Contractor #04:

Company Name:

POC:

Email:

Site Visit Info: ☒ Mandatory ☐ Optional

Site Visit Location:

Building Name: OIT Engineering Office

Address: 220 Bobby Dodd Way, Ga 30332

Comments:

Date: January 26, 2016 TIME: 10:00 am

SEALED BIDS DUE DATE: February 9, 2016 TIME: 2:00 pm

LETTER BID INVITATION

- Contracting Officer emails letter bid invitation along with supporting documentation to contractors listed on **Letter Bid Request** form
- Main components of a **Letter Bid Invitation** are
 - Project Name
 - Bid Contract Number and Project Number
 - Pre-Bid Conference Information
 - Project Manager Contact Information
 - Bid Opening Date and Time
 - Listing of Bid Package Submittal Documents

February 13, 2017

Via Email

INVITATION TO BID
(Request for Competitive Sealed Bids)
For

"Petit IBB Building North Interconnect A/C Unit Replacement"

Bid-Contract No. 0523-17 / Project No. 0099-2017

TO: E. Escher, Inc. / Max Escher max.escher@eescherinc.com
J & I Service Contractors, Inc. / Terry Hensel jandiservice@comcast.net
John F. Pennebaker Co., Inc. / Donnie McDaniel d.mcdaniel@johnpennebaker.com

FROM: Donna Vongsouvan, Facilities Contracting Officer
Kynthia Gaines, Construction Manager

You are invited to submit a sealed bid for the above referenced project. Bid documents are attached to this email.

A **MANDATORY** pre-bid conference is scheduled for **Wednesday, February 15, 2017 at 1:30 PM** at **Georgia Tech Petit Biotechnology Building (IBB), Room 0404, located at 315 Ferst Drive, Atlanta, GA 30332**. Kynthia Gaines will be the Construction Project Manager. You may contact her at kynthia.gaines@facilities.gatech.edu for any additional information or questions regarding this project.

Sealed bids are due by **2:00PM** local time on **Tuesday, February 28, 2017** in which they will be publicly opened and read aloud. Bid envelope should be *marked on the outside* with Name of Bidder, Project Name, Bid/Project Number, and date/time of opening. One (1) **unbound** original should be submitted to:

Donna Vongsouvan, Contracting Officer
Georgia Tech
Facilities Administration Building
Design & Construction Office
955 Fowler Street, NW
Atlanta, GA 30332-0410
Room 123 (First Floor)

Bid package submittal should including the following documents:

- Bid Form
- Business license and/or appropriate professional license
- E-Verify Affidavit
- Certificate of Insurance
- Contractor Safety Performance Expectation Sheet

Award will be made to the Contractor submitting the lowest responsive and responsible bid. Georgia Tech reserves the right to reject any or all bids to waive technicalities and to make an award deemed in its best interest. Georgia Tech reserves the option to negotiate terms, conditions and pricing with the lowest responsive, responsible bidder at its discretion.

GEORGIA PROCUREMENT REGISTRY (GPR)

- Construction/Design Projects \geq \$100K
- Items Needed for Posting to GPR
 - Budget for Contract
 - Form of Contract
 - Drawings/Specifications (if applicable)
- Allow 1-3 business days for posting to GPR
- Addendums cannot be issued within (5) days of bid opening without extending the bid opening date
- **For contract cost > \$100K & < \$250K** - Bid opening shall be no sooner than **(15)** calendar days after the date of posting to GPR
- **For contract cost > \$250K** - Bid opening shall be no sooner than **(30)** calendar days after the date of posting to GPR
- Bid opening dates can be on any day **except** weekends, Monday, a legal holiday, or day after legal holiday

Note: If Contract Budget \leq \$200K: Submit documents to Ericka Thomas at ericka.thomas@facilities.gatech.edu

If Contract Budget > \$200K: Submit documents to Donna Vongsouvan at donna.vongsouvan@facilities.gatech.edu

BID OPENING

- **Sealed Bids** are due to the **Contracting Officer** on the **date/time specified** on Bid Invitation
- **All bids** will be read out loud and recorded on the **Bid Tabulation Sheet**
- Contract will be awarded to the **lowest responsive bidder**
- Bid opening results for “Letter Bids” are **emailed** to the **Project Manager** and all **Contractors** listed on the Bid Invitation
- Bid opening results for contracts \geq \$100K will be posted on the Georgia Procurement Registry

GEORGIA INSTITUTE OF TECHNOLOGY
BID TABULATION

CONTRACT TITLE: Ferst Dr. Lighting-LED Installation Cherry St. to Fowler St. CONTRACT #: 0518D-17 DATE: 03/02/17 @ 2 PM

CONTRACTOR	BASE BID	ALT #1	ALT #2	ALT #3	ALT #4	BID BOND	ACK ADDEN (1-4)	DAYS
Brooks-Berry-Haynie	\$ 77,500.00							
Hewatt Electrical Contractors	\$ 78,830.00							
Vantix Electric	\$ 72,180.00							

I certify that this is a correct tabulation of bids as read aloud, and I certify that I have personally and visually checked the bid tabulation against the proposal forms submitted. Vantix Electric is the apparent low bidder.

Recorded By: Erica Thomas (E.T.)

INDEFINITE DELIVERY INDEFINITE QUANTITY (IDIQ)

- Highly qualified engineering firms (Consultants) are selected via Request for Qualifications (RFQ) posted to Georgia Procurement Registry
- Selected firms provide traditional and specialized engineering services, including estimating, scheduling, and construction administration.
- Current Categories
 - Landscape, Civil Engineering, & Survey Services
 - Commissioning Agent Professional Services
 - Mechanical & Electrical Engineering Services
 - Lab Architectural & Engineering Services
 - Cost Manager Professional Services
 - Environmental Consulting Services
 - Structural Engineering Services
 - Architectural, Interior Design & Engineering Services
 - Surveyor Services
 - AV/Telecom Services

INDEFINITE DELIVERY INDEFINITE QUANTITY (IDIQ) CONTINUED

- Contract term is (1) year with a possibility of a (1) year renewal
- Consultant(s) are required to develop and deliver contract documents for one or more delivery methods:
 - Task Order
 - CM at Risk
 - Design Bid Build
 - Letter Bid
 - Direct Award
- Total fees for any single IDIQ contract cannot exceed \$600,000 in any single year
- An **Exhibit A** form should be completed for all new Design or Construction Contract Administrative Orders
- A **Design Professional Amendment** form should be completed to amend an existing Design or Construction Contract Administrative Order

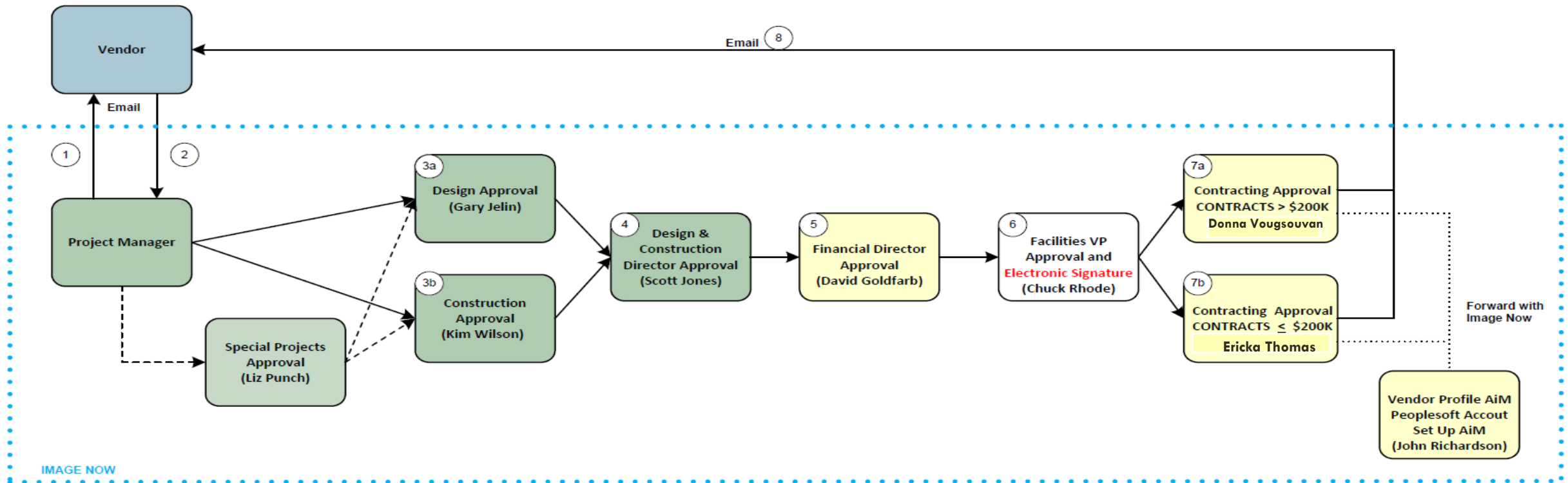
TASK ORDER CONTRACTS

- Firms interested in providing **Task Order Contractor Services** for **construction projects** at Georgia Tech (via **CM at-Risk with a GMP, Design-Bid-Build, Design-Build project delivery method**) are selected via Request for Qualifications (RFQ) posted to Georgia Procurement Registry
- Projects may include
 - Renovations
 - Related Building Repair & Maintenance Work
- Contract term is one (1) year
 - Possibility of extending the contract up to a maximum of (4) additional years
- The maximum of Task Order Agreements issued, including change orders, shall **not exceed** \$2.5M or amount outlined in the Master Task Order Contract
- **Task Order Agreement (Exhibit B)** should be issued for **each** project under the master Task Order Contract
- Performance and payment bonds are **required** in an amount equal to **100%** for any Task Order Agreement over **\$100,000**.
- The **Lump Sum Change Order Format** form should be used in order to change an **existing** Task Order Agreement

CONTRACT ROUTING VIA IMAGENOW

FACILITIES CONTRACT ROUTING WORKFLOW

Facilities Contract Routing Work Flow - **Electronic Signature by VP**

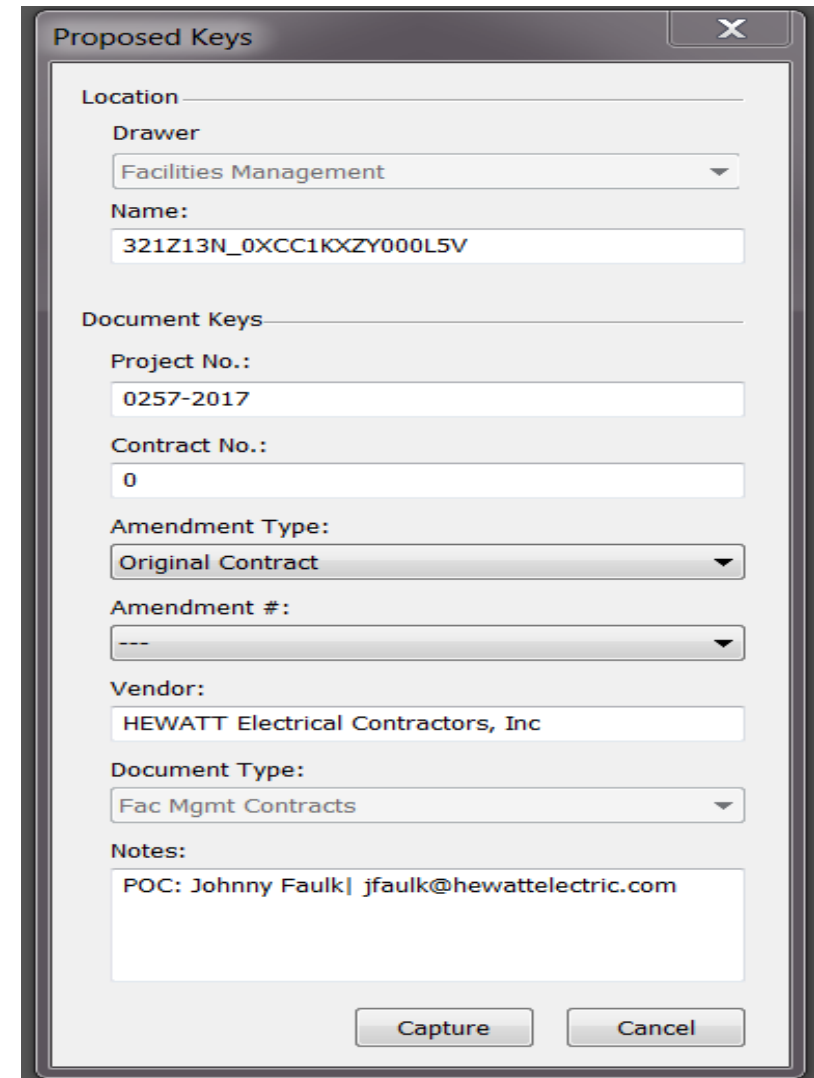


(1) Project Manager sends electronic copy of contract document to vendor by email. (2) Vendor signs in colored ink, scans an electronic copy of contract document back to Project Manager. (If a copy is mailed back, PM can scan to a PDF.) Project Manager prints contract to Image Now and completes contract routing form in Image Now. (3 - 5) Image Now routes contracts through Design and Construction, and Finance Director for review and approvals. (6) Facilities VP completes electronic and digital signature on contract. (7) Image Now routes to Contracting Officer based upon contract value selected by Project Manager on initial form. Insurance, vendor profiles and other information are finalized prior to approval by Contracting Officer. Contracting Officer appends contract with NTP and any other supporting documents in Image Now and approves contract. (8) Contracting Officer forwards executed contract/supporting documentation to vendor by email.

CONTRACT ROUTING WORKFLOW PROPOSED KEYS

*Required Fields

- **Project No.**
 - Ex: 0257-2017
 - Do not include cost estimate number
- **Contract No.**
 - Enter “Pending” for new contracts
 - Enter assigned Contract No. for Amendments/Change Orders
- **Amendment Type**
 - Select “Original Contract” for new contracts otherwise select “Amendment, Change Order, Component Change Order, GMP Change Order, Lump Sum Change Order”
- **Amendment #**
 - Select “---” for new contracts or select the amendment/change order number (Ex. 001)
- **Vendor Name**
- **Notes**
 - Enter the vendor’s email address
 - Add any special notes for Facilities Business Department



The screenshot shows a 'Proposed Keys' dialog box with the following fields and values:

- Location:**
 - Drawer: Facilities Management (dropdown)
 - Name: 321Z13N_0XCC1KXZY000L5V (text)
- Document Keys:**
 - Project No.: 0257-2017 (text)
 - Contract No.: 0 (text)
 - Amendment Type: Original Contract (dropdown)
 - Amendment #: --- (dropdown)
- Vendor:** HEWATT Electrical Contractors, Inc (text)
- Document Type:** Fac Mgmt Contracts (dropdown)
- Notes:** POC: Johnny Faulk | jfaulk@hewattelectric.com (text)

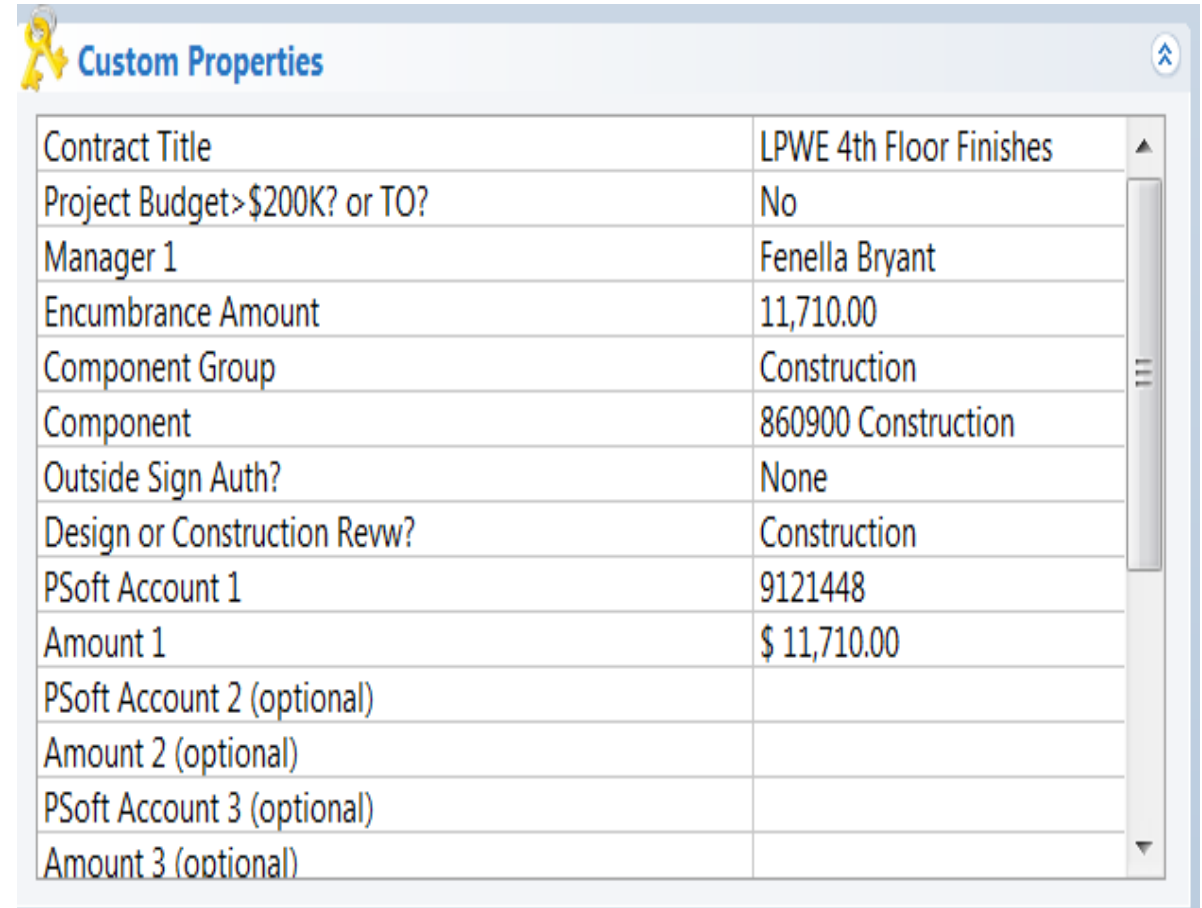
Buttons at the bottom: Capture, Cancel

CONTRACT ROUTING WORKFLOW

CUSTOM PROPERTIES

*Required Fields

- **Contract Title**
 - Please include a detailed title based on scope of work
- **Project Budget > \$200K? OR TO?**
 - Select “Yes” if...
 - Total Project Budget is greater than \$200K
 - Task Order (please select **“Yes”** for **ALL Task Order** (TO) related contracts regardless of total project budget)
 - Select “No” if ...
 - Total Project Budget is less than or equal to \$200K
 - IDIQ (please select **“No”** for **ALL IDIQ** related contracts regardless of total project budget)
- **Manger Name**
- **Encumbrance Amount**
- **Component Group/Component**
- **Psoft Account 1**
 - Please verify peoplesoft account number before routing contract through ImageNow
- **Amount 1**



The screenshot shows a 'Custom Properties' window with a table of fields and values. The fields are: Contract Title, Project Budget > \$200K? or TO?, Manager 1, Encumbrance Amount, Component Group, Component, Outside Sign Auth?, Design or Construction Revw?, Psoft Account 1, Amount 1, Psoft Account 2 (optional), Amount 2 (optional), Psoft Account 3 (optional), and Amount 3 (optional). The values are: LPWE 4th Floor Finishes, No, Fenella Bryant, 11,710.00, Construction, 860900 Construction, None, Construction, 9121448, \$ 11,710.00, and empty for the optional accounts and amounts 2 and 3.

Field	Value
Contract Title	LPWE 4th Floor Finishes
Project Budget > \$200K? or TO?	No
Manager 1	Fenella Bryant
Encumbrance Amount	11,710.00
Component Group	Construction
Component	860900 Construction
Outside Sign Auth?	None
Design or Construction Revw?	Construction
Psoft Account 1	9121448
Amount 1	\$ 11,710.00
Psoft Account 2 (optional)	
Amount 2 (optional)	
Psoft Account 3 (optional)	
Amount 3 (optional)	

Note: If the contract is to be split across more than one account, use the Psoft Account 2 & 3 fields.

COMMON REASONS A CONTRACT IS ON **HOLD**

- Contractor needs to complete or update Vendor Profile Form
- Certificate of Insurance (COI) has expired
- E-Verify is not active
- Contractor Safety Performance Expectations Form has expired
- AiM Project Budget needs updating

DELETING A CONTRACT FROM IMAGENOW

In order to delete a contract from ImageNow:

- Enter “Delete” in the **Project No.** & **Contract No.** fields
- Add “sticky note” for detailed explanation
- Save changes
- Close contract

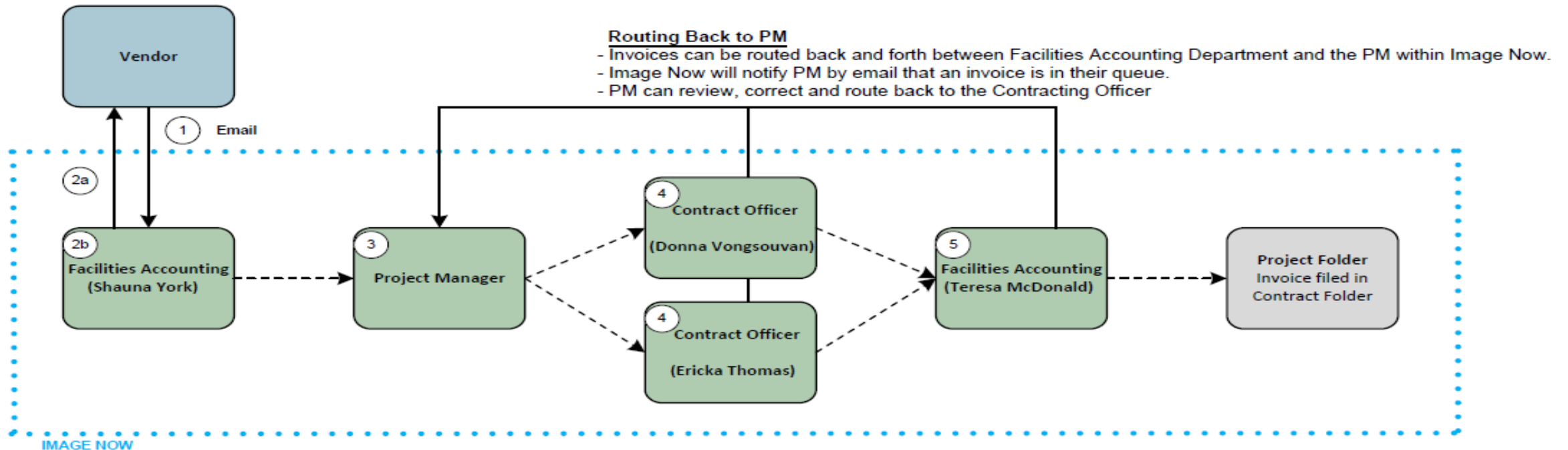
CONTRACT WORKFLOW QUEUE DECODER

Name of Queue	Person Managing Queue / Description
CTR Return to PM	Project Manager who initiated the document must address correctios
CTR Return to PM - Outside Signature	Project Manager needs to manage hard copies of a document signed outside of Facilities
CTR Approval Start	Project Manager has started a contract document but it needs more information and won't leave PM queue
CTR Design Approval	Gary Jelin - oversight of design related contract documents
CTR Construction Approval	Kim Wilson - oversight of construction related contract documents
CTR Campus Services	TBD - oversight of campus services related contract documents
CTR Special Projects	Liz Punch - oversight of special projects related contract documents
CTR D&C Director Approval	Scott Jones - oversight of all contract documents
CTR Financial Director Approval	David Goldfarb - oversight of all contract documents
CTR eSignature	Chuck Rhode - oversight of all contract documents
CTR Year End	Contracts that are not approved and put in a Year End queue for consideration with year end funds
CTR eSignature Declined	Scott Jones will manage this queue and consult with PMs on any contracts that are rejected by VP Facilities.
CTR Contract Officer >200K Approval	Donna Vongsouvan contracting officer queue.
CTR Contract Office ≤ 200K Approval	Ericka Thomas contracting officer queue.
CTR Approval Complete	Contracts that are complete.

INVOICE ROUTING VIA IMAGENOW

D&C INVOICE ROUTING WORKFLOW

Facilities Invoice Routing Work Flow – Design and Construction Invoices



2a) If invoice does not have contract number, or project number, it will be returned to the vendor and deleted from the queue. Standard email instructions on how to submit an invoice for payment is included when invoices are returned to the vendor.

Note: Invoices for Contracts with a “D” in the contract number are automatically routed to Ericka Thomas, without a “D” goes to Donna Vongsouvan

INVOICING FOR CONTRACTS

- **ALL** invoices for **contracts** should be emailed to gtfacinvoice@gatech.edu
- The AIM Project No. & Contract No. **must be** listed on the invoice
 - Example Contract No. (**0351D-17 or 0257-17**)
 - Example Project No. (**0235-2017**)
- Please include all close-out documents with final invoice (construction contracts \geq \$50K)
- The invoice **must be** stamped by the Project Manager in **ImageNow**
- GT payment terms are **30 days** from the date of invoice

Note: The invoice date **must be** after the date listed on the Notice to Proceed

INVOICE APPROVAL

The PM should do the following before approving an invoice for payment:

- Review data fields in ImageNow for accuracy
 - Project No.
 - Contract No.
 - Invoice Amount
 - Psoft Account No.
- If necessary, adjust dollar value
- Select “Yes” or “No” in the “Final Invoice?” field under “Custom Properties”

Invoice

The S / L / A / M Collaborative, Inc.
Somerset Square
80 Glastonbury Boulevard
Glastonbury, CT 06033-4415
Telephone (860) 657-8077

FAC INV OK TO PAY
MCERALLOS 3/20/2017 3:13:17 AM

Maria Ceballos
Project Manager
Georgia Institute of Technology
955 Fowler Street, NW, Suite 321
Atlanta, GA 30332

March 9, 2017
Project No: 16167.00
Invoice No: 1014461

Invoice Total \$7,450.00

Project 16167.00 Georgia Tech: Aerospace Engineering Renderings & Master Plan

Re: DA GCC: Master Planning Services for Aerospace Engineering
Project No. 0098-2017/Contract No. 0402D-17
Contract Amount: \$74,500.00
Email invoice to: gtfacinvoice@gatech.edu
Professional Services from January 28, 2017 to February 24, 2017

Total	74,500.00				
Percent Complete	35.00	Total Earned	26,075.00		
		Previous Fee Billing	18,625.00		
		Current Fee Billing	7,450.00		
		Total		7,450.00	
		Total this Invoice		\$7,450.00	

Billings to Date	Current	Prior	Total	Received	A/R Balance
Fee	7,450.00	18,625.00	26,075.00		
Totals	7,450.00	18,625.00	26,075.00	18,625.00	7,450.00

Properties

Document Keys

Drawer
Facilities Management

Name
321Z13J_0XB8TQJTH0002BP

Project No.
0098-2017

Contract No.
0402D-17

Invoice No.
1014461

PO Number
9010361355

Vendor Name
The S/L/A/M Collaborative Inc.

Type
Fac Mgmt Invoices

More...

Custom Properties

Manager 1	Maria Ceballos
Invoice Date	03/09/2017
Invoice Amount	7,450.00
PSoft Account 1	9121424
Amount 1	\$ 7,450.00
PSoft Account 2 (optional)	
Amount 2 (optional)	
PSoft Account 3 (optional)	
Amount 3 (optional)	
Final Invoice?	
PO Pay?	

DELETING AN INVOICE FROM IMAGENOW

In order to delete an invoice from ImageNow:

- Enter “Delete” in the **Invoice No.** & **Contract No.** fields
- Add “sticky note” for detailed explanation
- Save changes
- Route invoice to “INV Return to Approval Start” queue

INVOICE WORKFLOW QUEUE DECODER

Name of Queue	Person Managing Queue / Description
INV Approval Start	Shauna York manages invoices coming into the system
INV Return to Approval Start	Shauna York manages invoices coming into the system
Purchase Order Invoices	Brenda Cochran manages purchase order invoices
INV Contracting Officer > 200 K Approval	Donna Vongsouvan manages invoices against contracted amount
INV Contracting Officer < 200 K Approval	Ericka Thomas manages invoices against contracted amount
INV Accounting Approval	Teresa McDonald prepares invoice to go to AP
INV PM Approval	Project Manager approval of invoice
INV Return to PM	Project Manager needs to respond to an issue on the invoice and route back to correct person in accounting.
INV Approval Complete	Invoices that are complete.

WEB LINKS

IMPORTANT WEB LINKS

- **VENDOR LOOKUP** - https://webapps.gatech.edu/cfeis/vendor_info/vendor_lookup_form.cfm
- **CONTRACTING FORMS/TEMPLATES** - <http://facilities.gatech.edu/>
 - Click “Administration” Tab
 - Select “Standard Forms & Templates”
- **STATE OF GEORGIA CONSTRUCTION MANUAL** -
 - <http://www.scm.georgia.gov/SCM%202015/2015%20SCM%20Approved.pdf>



THANK YOU!!!