Subcontractor Navigation Guide

Version 003: November 2024

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Introduction

Welcome to Turner's third-party prequalification platform, managed and secured by Vertikal RMS, Inc. Here are a few things to note before proceeding:

1. The term "Hiring Client" is the equivalent of the Turner Construction or SourceBlue Business Unit(s) (BU), where a company submits the prequalification form and supporting documents for review.
2. A user account must have a unique email address.
3. For confidentiality and security reasons, sole proprietors who use their social security number as their tax identification cannot use the prequalification platform. Don't hesitate to contact the local BU for assistance.
4. Be prepared to upload a current W9 or country-specific tax form equivalent and other supporting documents. See a complete list of required documents below.
5. Register with your legal "Company Name" as shown on your company tax returns. DO NOT reference a "dba" name.
6. If a company requires more than one user account, email servicedesk@tcco.com to request additional user accounts after the company has successfully registered. The email must include the following:
    - A copy of your W9 or country-specific tax equivalent form
    - The user's first and last name
    - User's telephone number; and
    - Unique email address not already in use
7. Although one hiring client is selected at registration as the primary Business Unit to receive the notification when your prequal is submitted, you can choose additional Business Units within the form. We suggest contacting the other selected hiring clients with notice of application submission and allowing those procurement departments to review your application.

Required Documents

Before starting the prequalification process, gather the following documentation to expedite the completion of the application and be ready to upload where indicated:

• Copy of W9 form or country-specific tax equivalent • List of company license numbers • List of state/province sales tax numbers • List of state unemployment insurance numbers (if applicable) • List of current projects • List of recently completed projects • Current financial statement • Under-represented Business Enterprise (UBE) certification information • Bank information (upload a Line of Credit letter from the bank) • Dun and Bradstreet information • Surety information (upload a letter from Surety indicating per project and aggregate bonding limits) • Three supplier references • Three contractor references • Insurance policy information (upload a current sample certificate and additional insured endorsement forms)	• Copy of your Safety Program • Independent verification letter supporting your EMR (US entities only) with the effective date (MM/DD/YEAR) for the last three years* • Safety Data and/or OSHA 300 logs from the last three years* • ESG Program • Published environmental targets • Modern slavery and human trafficking statement and/or policy • Business Ethics Policy *Ontario companies, please provide WISR, CAD7, and WISB Clearance Certificate *British Columbia companies, please provide: WorkSafe BC Clearance Letter, WSBC Employer's Report, and Evidence of notices issued by WSBC & company response for the past 3 years

Create a headquarters prequal profile.

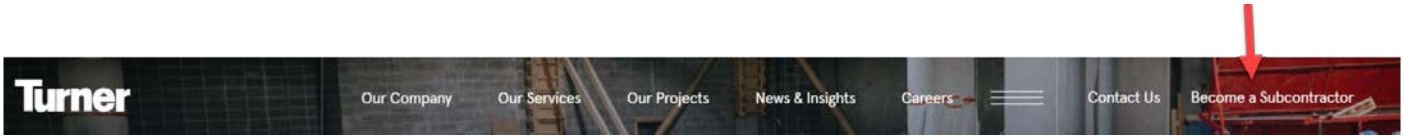
If the company is ***not*** already registered with Turner/SB, there are two ways to complete the registration process:

- By visiting www.turnerconstruction.com and completing the "Subcontractor ***Application*** Form" process; or
- By invitation, use the link from the hiring client's email invitation to complete the "Subcontractor ***Registration*** Form" process.

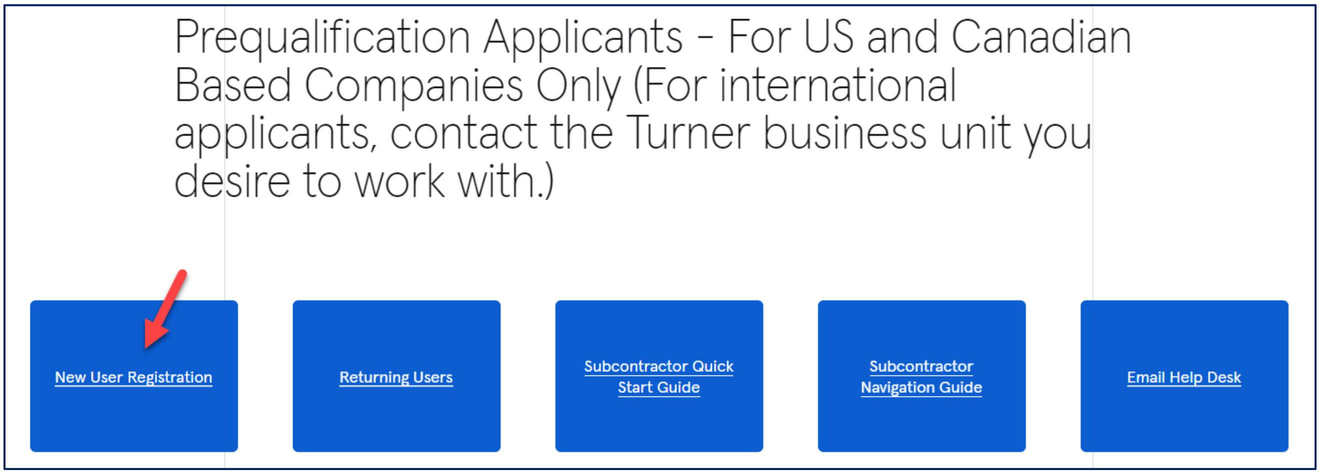
These methods have minor differences, but both follow the same processing guidelines. See below for additional information.

The "Subcontractor *APPLICATION* Form"

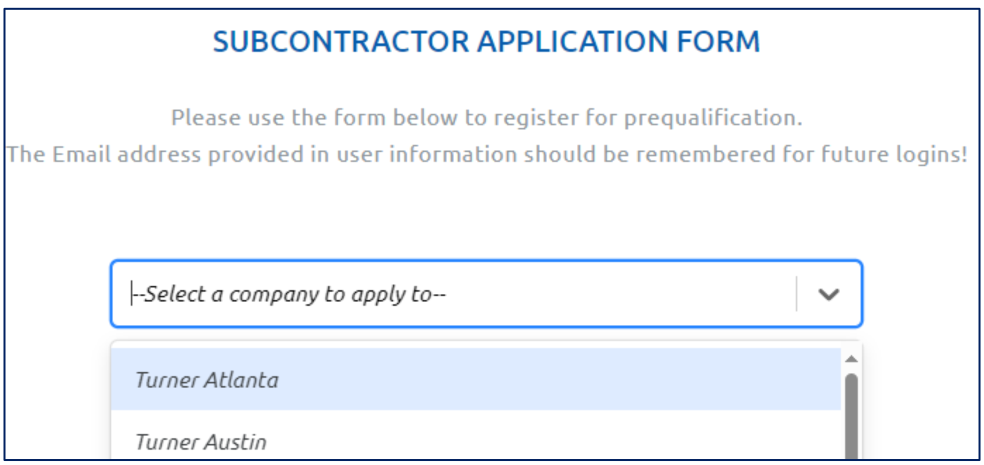
1. Go to turnerconstruction.com and click **Become a Subcontractor.**



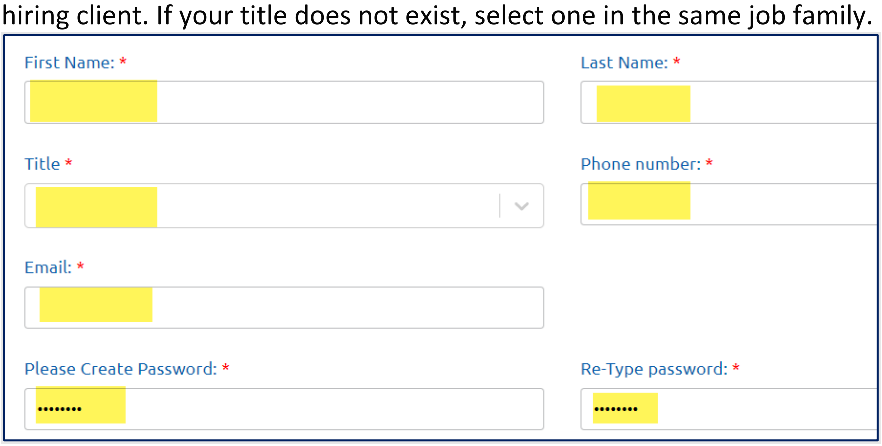
2. Scroll to the bottom of the page and click “**New User Registration**.”



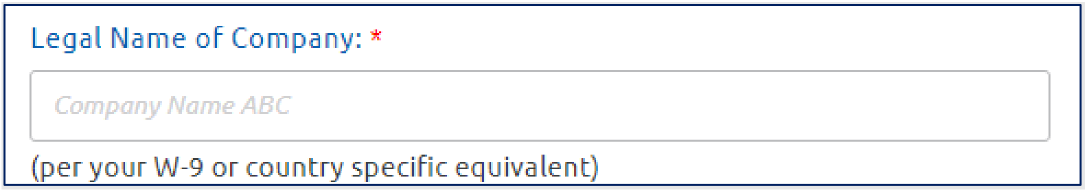
3. Select the **primary** hiring client (Business Unit) to whom you will submit the prequalification form and documents for review.



4. Begin entering your user-specific information. This user will have access to the prequalification form with this hiring client. If your title does not exist, select one in the same job family.



5. Enter your company's legal name as it appears on your W-9 or country-specific tax equivalent form. Refer to the information on page 2 for detailed instructions.



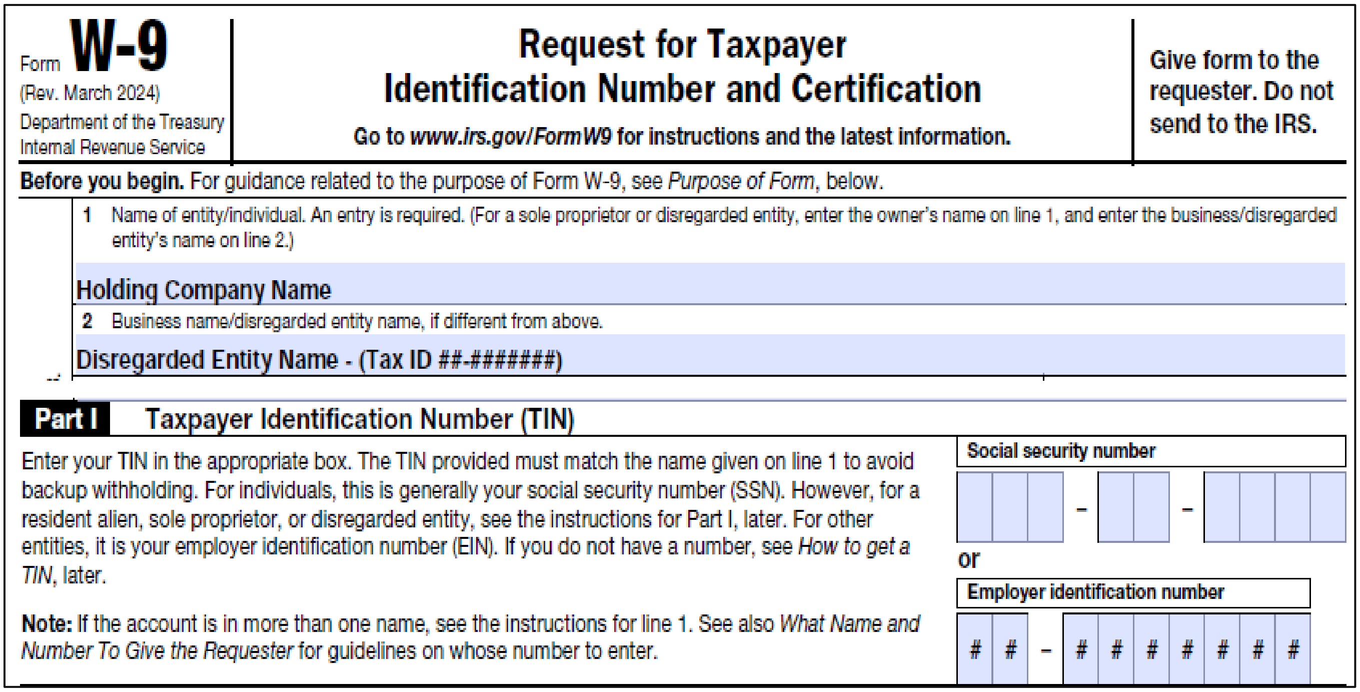
Legal Name of Company: *

Company Name ABC

(per your W-9 or country specific equivalent)

Note: For a disregarded entity company,

- o Register with the disregarded entity name and tax identification number.
- o One main disregarded entity branch office can register as the "headquarters office."
- o Upload a W9 or country-specific tax equivalent form with the following:
  - ▪ The holding company's legal name on line 1 with their tax identification number listed on Part I; and
  - ▪ The disregarded entity's name, without reference to a "dba," on line 2 with their tax identification number. See the example below.



Form **W-9** (Rev. March 2024) Department of the Treasury Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Go to *www.irs.gov/FormW9* for instructions and the latest information.

Give form to the requester. Do not send to the IRS.

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)

Holding Company Name

2 Business name/disregarded entity name, if different from above.

Disregarded Entity Name - (Tax ID ##-#######)

Part I **Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

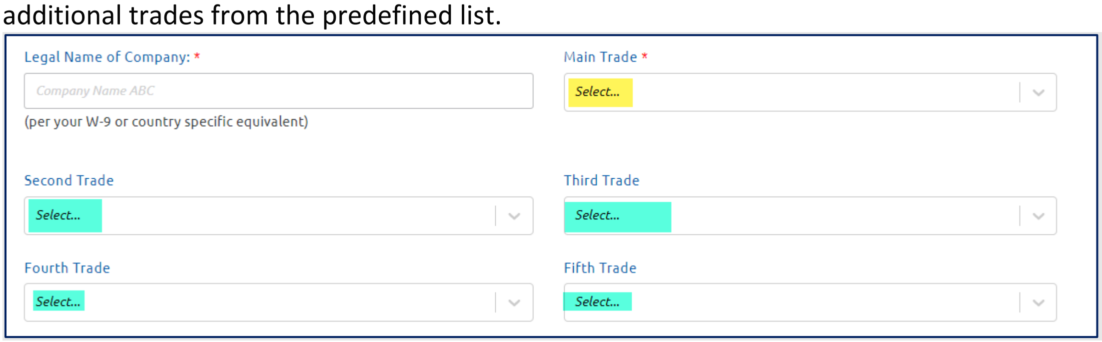
– –

or

Employer identification number

– # # # # # #

6. For the **Main Trade**, please select the most general description of your company's trade and up to four additional trades from the predefined list.



Legal Name of Company: * Company Name ABC (per your W-9 or country specific equivalent)

Main Trade * Select...

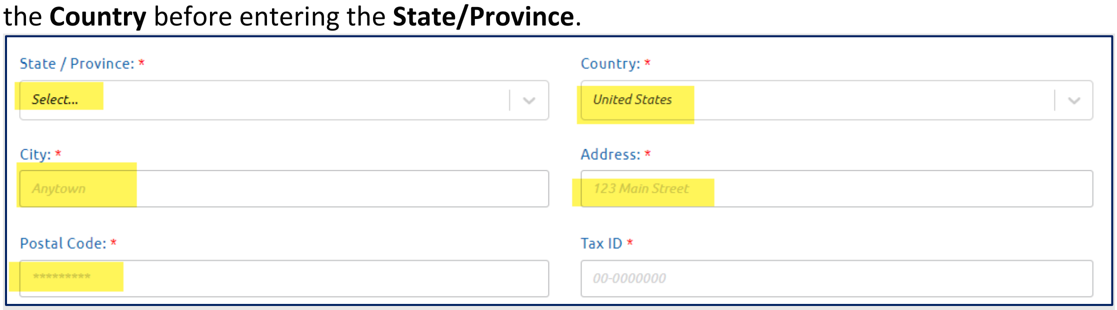
Second Trade Select...

Third Trade Select...

Fourth Trade Select...

Fifth Trade Select...

7. Enter your company's ***headquarters*** address, **not** a branch office. For international companies, ***FIRST,*** change the **Country** before entering the **State/Province**.



State / Province: * Select...

Country: * United States

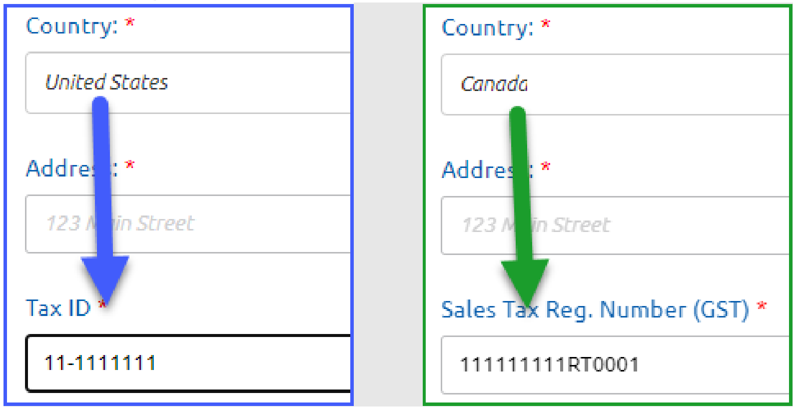
City: * Anytown

Address: * 123 Main Street

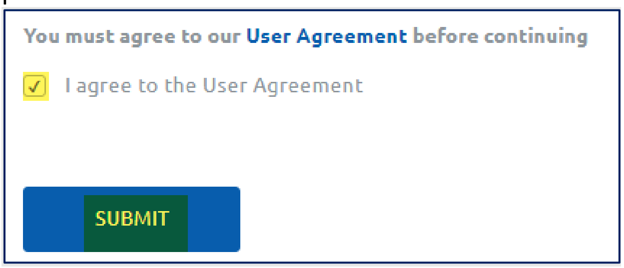
Postal Code: * *********

Tax ID * 00-0000000

8. For US companies, enter your nine-digit tax identification number without the dash "-." Enter your fifteen-digit Sales Tax Registration Number (GST) for Canadian companies. The format must be **#########RT####**.



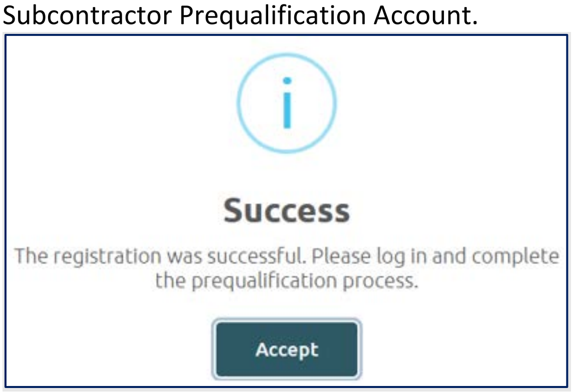
9. Please review Vertikal's user agreement, check the "**I agree to the User Agreement**" box, and click **Submit** to proceed.



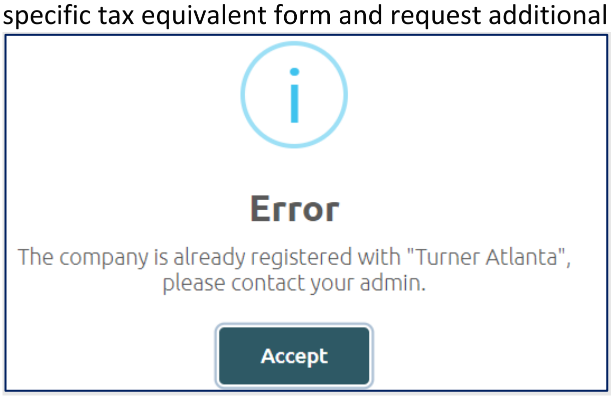
The "Subcontractor *REGISTRATION* Form"

Use the registration link in the email you received to access Turner's third-party prequalification platform. Follow the guidelines outlined in the instructions on the **Subcontractor Application Form**. Because the hiring client sent you an invitation, items 1 through 3 from the above do not apply.

After successfully registering, you will see the pop-up below. Click **Accept**, and you'll be redirected to your company's Subcontractor Prequalification Account.

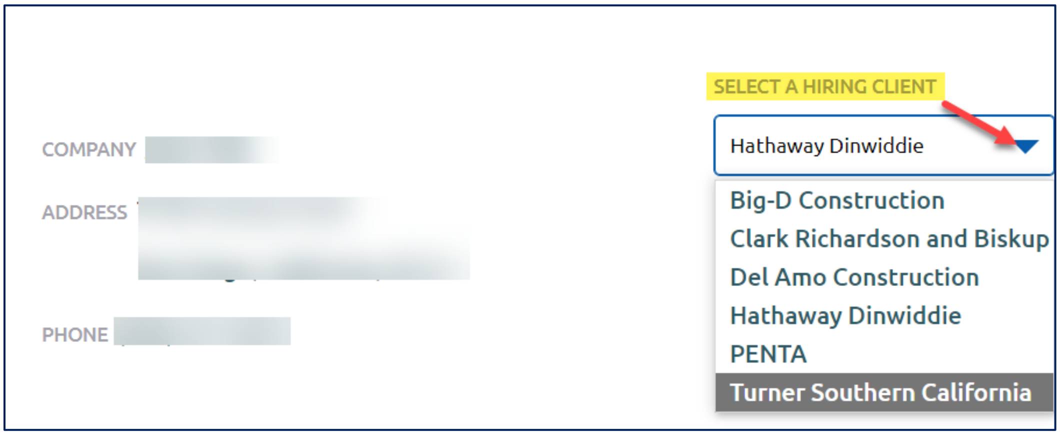


If registration is unsuccessful, the pop-up below will appear; email servicedesk@tcco.com with a copy of your country-specific tax equivalent form and request additional assistance.



Subcontractor Prequalification Account

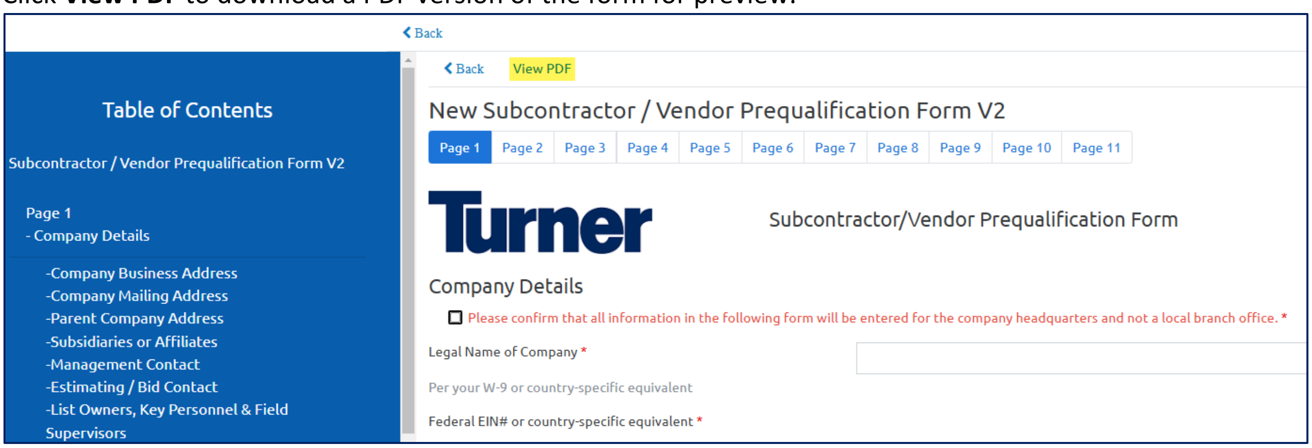
After completing the registration process, you will be redirected to your company's prequalification profile. If the company works with other general contractors who utilize Vertikal as their prequalification platform, use the dropdown arrow under “**SELECT A HIRING CLIENT**” to access that general contractor’s prequalification portal to complete and submit the general contractor’s specific prequalification form.



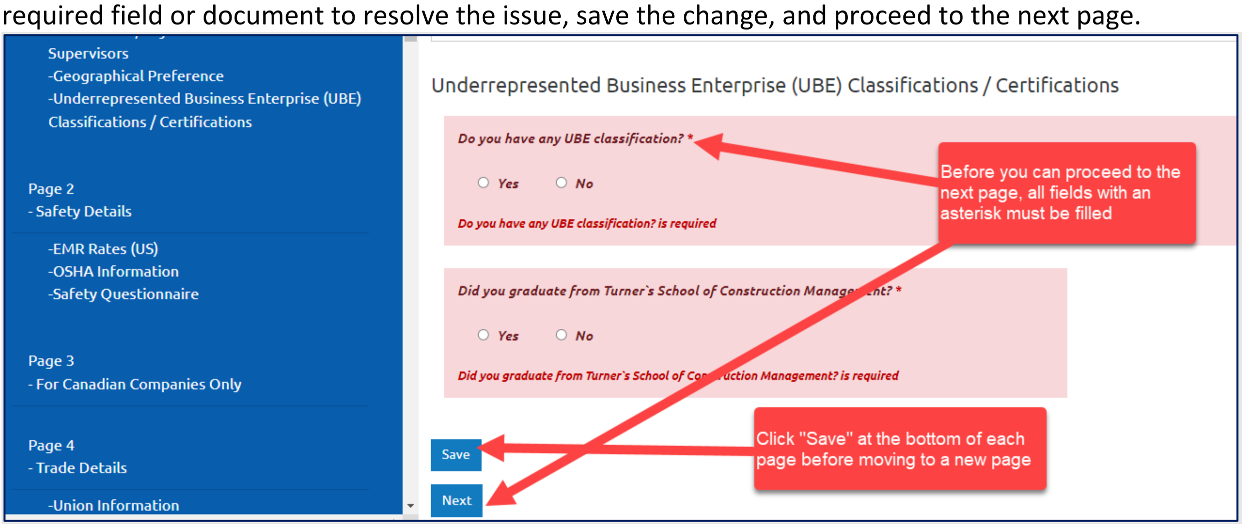
Complete the Prequalification Form

The system auto-saves your entries roughly every five minutes. However, the best practice is to click **Save** at the end of each page BEFORE proceeding further.

1. Click the **Form Submission** button of the most recent form with the status "**Incomplete**."
2. Start entering data into the form.
3. At the bottom of the page, click **Save** and **Next**.
4. Click **View PDF** to download a PDF version of the form for preview.

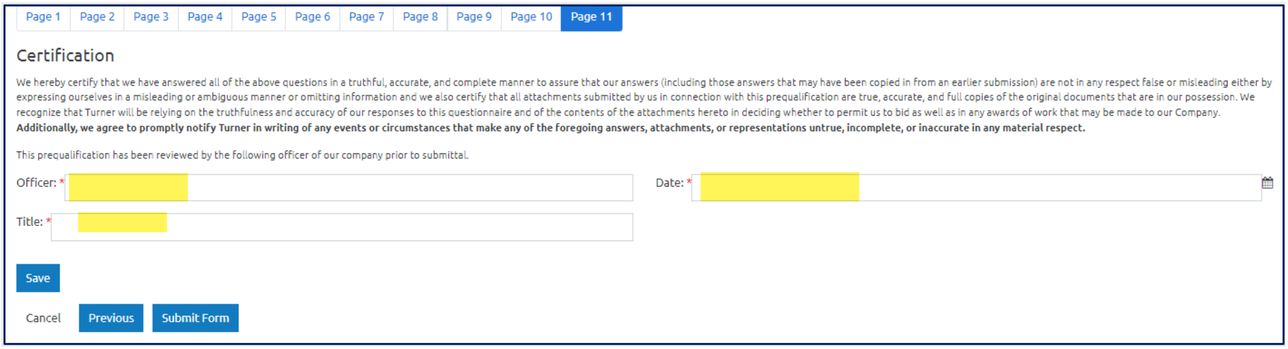


5. When clicking the **Next** button, the page will freeze if a required field is blank. Scroll up to review the missed required field or document to resolve the issue, save the change, and proceed to the next page.



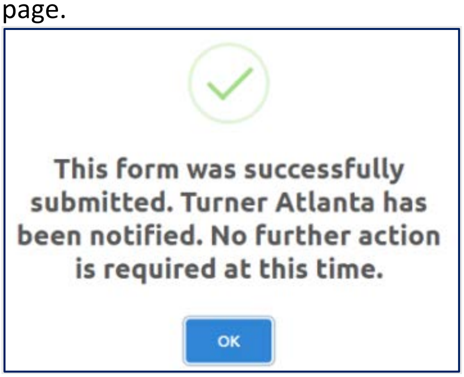
6. To upload a file, drag and drop files or click the **Browse** button to select a file. The max file size is 100 MB.

7. After completing all the required fields and uploading documents where indicated, complete the **Certification** section and click **Submit Form**. Please ensure a company officer has reviewed and signed the form.



Once submitted, the form and uploaded files are locked from further edits or deletions. If additional modifications are needed, the hiring client(s) can unlock the form for you to edit and resubmit.

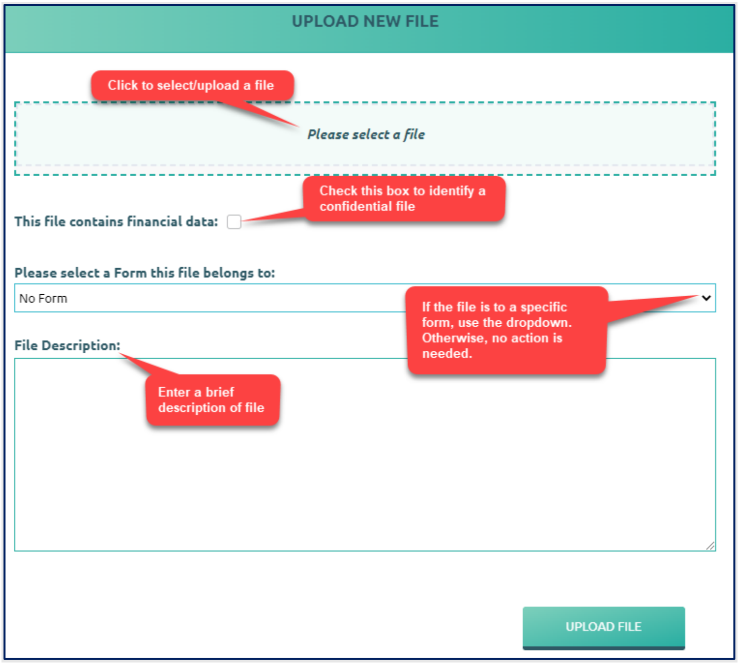
8. If the submission is successful, the message below will appear. Click OK to exit the form and return to the home page.



Upload / Download Files

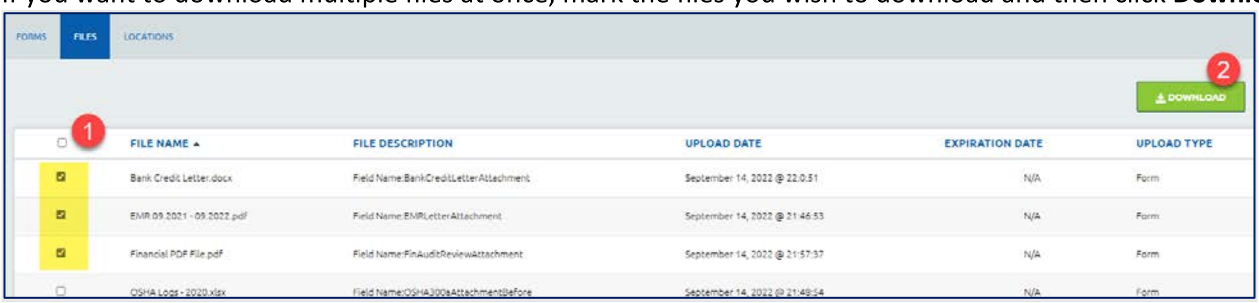
After submitting a form, you can upload additional files if needed.

1. Go to the **Files** tab.
2. Click the **Upload File** button.
3. Select the new file for upload.
4. Check the box if this is a financial file (Financial Statement) to restrict viewing to limited users in the Vertikal system.
5. Select the form in the drop-down if the file belongs to a specific Prequalification Form.
6. Add a brief file description, such as the file name.
7. Click **Upload File**.



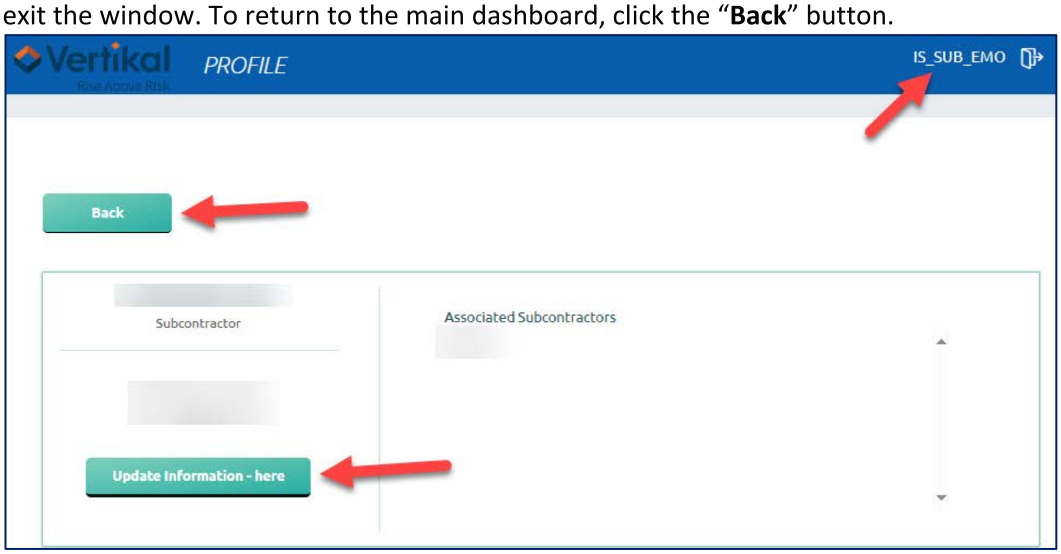
To view or download files, use the following steps below:

1. If you want to open one individual file, click **View.**
2. If you want to download multiple files at once, mark the files you wish to download and then click **Download**.



Change Your User Information

Click on your name to update your user profile information if necessary. Then click **Save User** to save your changes and exit the window. To return to the main dashboard, click the "**Back**" button.

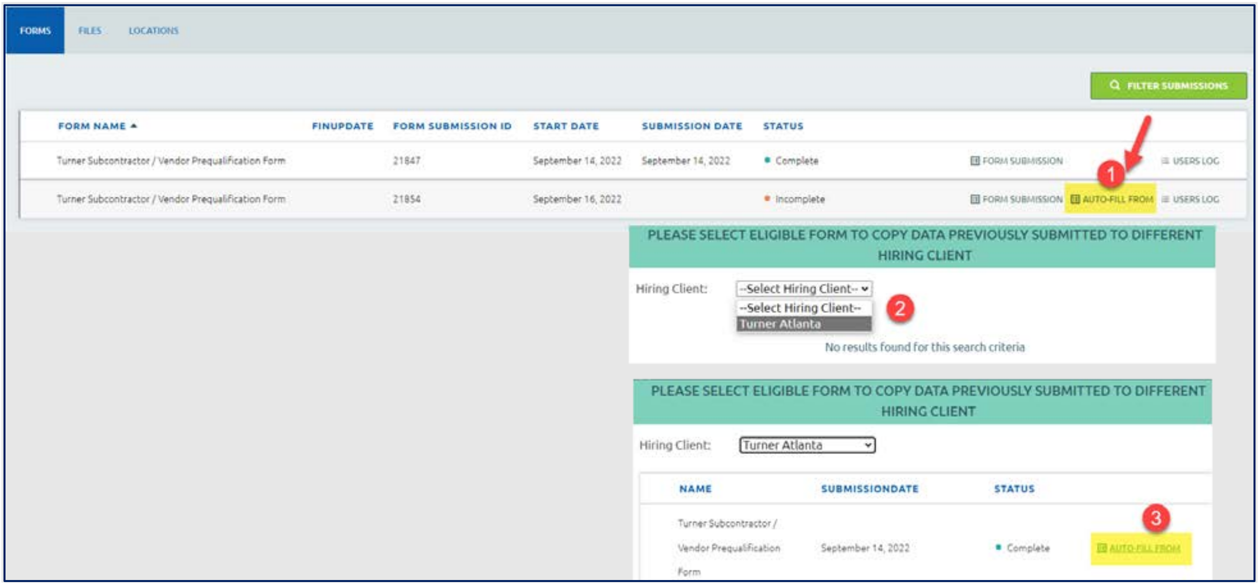


Prequalification Form Renewal – "Auto-Fill From" Option

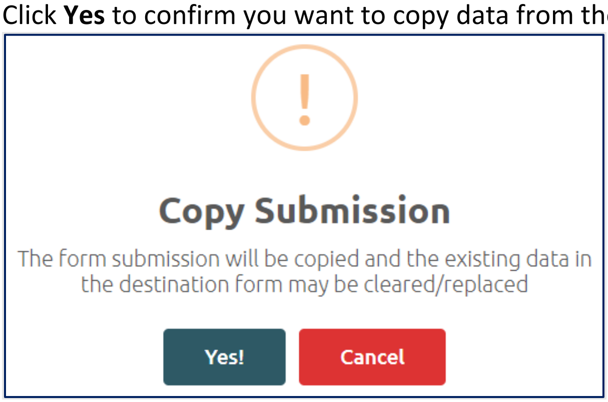
The ***completed*** prequalification form itself is valid for 24 months. In the "**Forms**" tab, if you only have a form with "**Complete**" status, **NO** action is needed on the prequal form. At the time of renewal, a system-generated email with a user account will be sent to all applicants' company staff. Click on the URL link in the renewal email to access the login page and begin the renewal process.

The **AUTO-FILL FROM** feature can be used to copy over some information from a previously "Complete" status prequal form if available. If the auto-fill option is unavailable, complete the form from the beginning.

1. Click **Auto-Fill Form.**
2. Select the Hiring Client's prequalification form from which you want to copy data.
3. Click **Auto-Fill From** on the current **Complete** form.

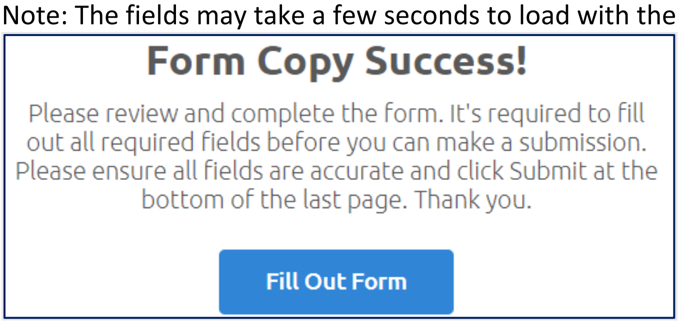


4. Click **Yes** to confirm you want to copy data from the selected source form.



5. Click the **Fill Out Form** for the system to begin auto-filling eligible pre-filled data fields populated. Please review all auto-populated data to ensure no changes need to be made, complete any cleared field with updated information, and upload new files where applicable before submitting the renewal form for review.

   Note: The fields may take a few seconds to load with the copied data.



CRITICAL: If you are not ready to complete the renewal form, at the bare minimum, enter the company name and tax ID and click the SAVE button. Failure to enter/save new information clears the auto-filled fields. If the auto-filled areas are removed when you log back in, you can perform the auto-fill form process again or complete the prequal from scratch.

Yearly Documentation Renewal

Information such as your company's financial statements, EMR, and UBE certifications may require yearly renewal. At the time of renewal for these specific documents, Turner/SB procurement personnel may reach out to you directly, or an automated email from Vertikal may be generated as a reminder to all user accounts associated with your company with instructions on how to upload the renewal documents. Follow the instructions in the email to upload the updated file(s) to support renewal.

If needed, the hiring client will email your company for other files, such as OSHA logs.

***** END *****