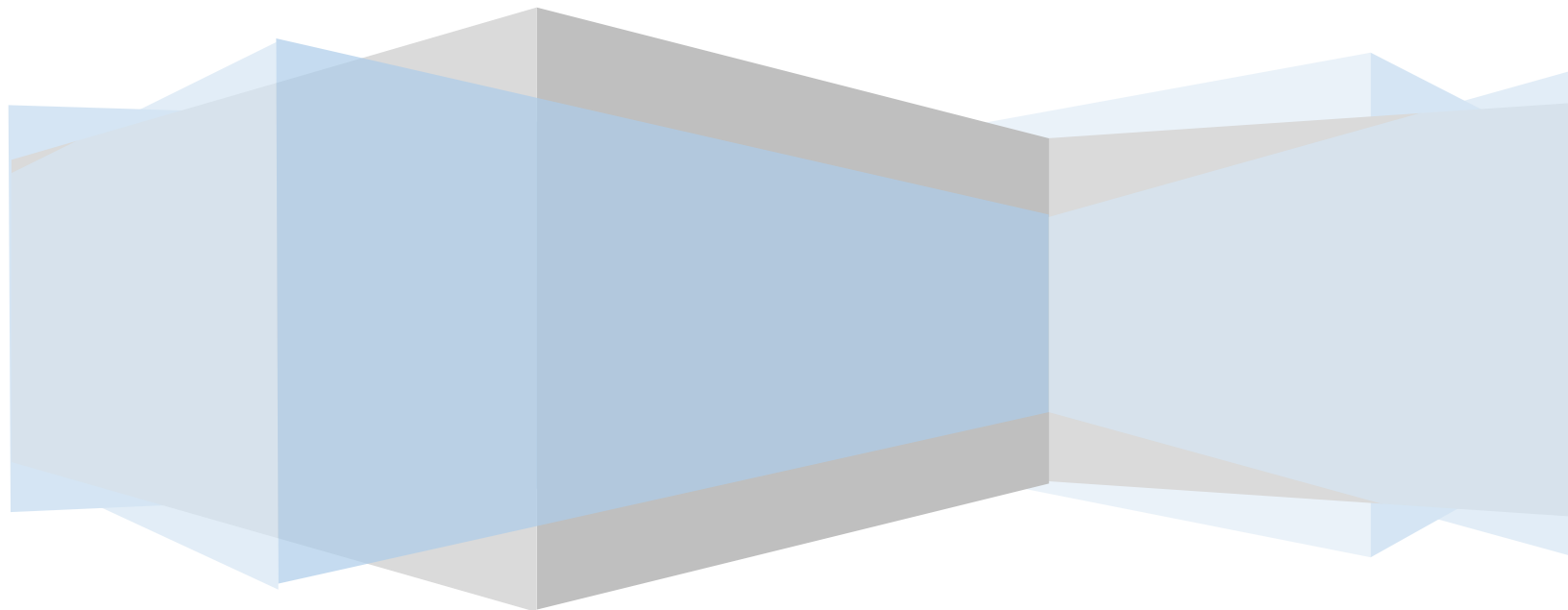


Subcontractor Navigation Guide

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:
 - o A copy of your W9 or country-specific tax equivalent form
 - o The user's first and last name
 - o User's telephone number; and
 - o 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:

<ul style="list-style-type: none">• 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)	<ul style="list-style-type: none">• 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 <p>*Ontario companies, please provide WISR, CAD7, and WISB Clearance Certificate</p> <p>*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</p>
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Create a headquarters prequal profile.

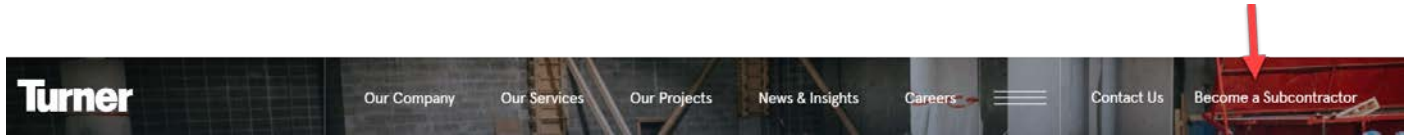
If the company is **not** already registered with Turner/SB, there are two ways to complete the registration process:

- 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.

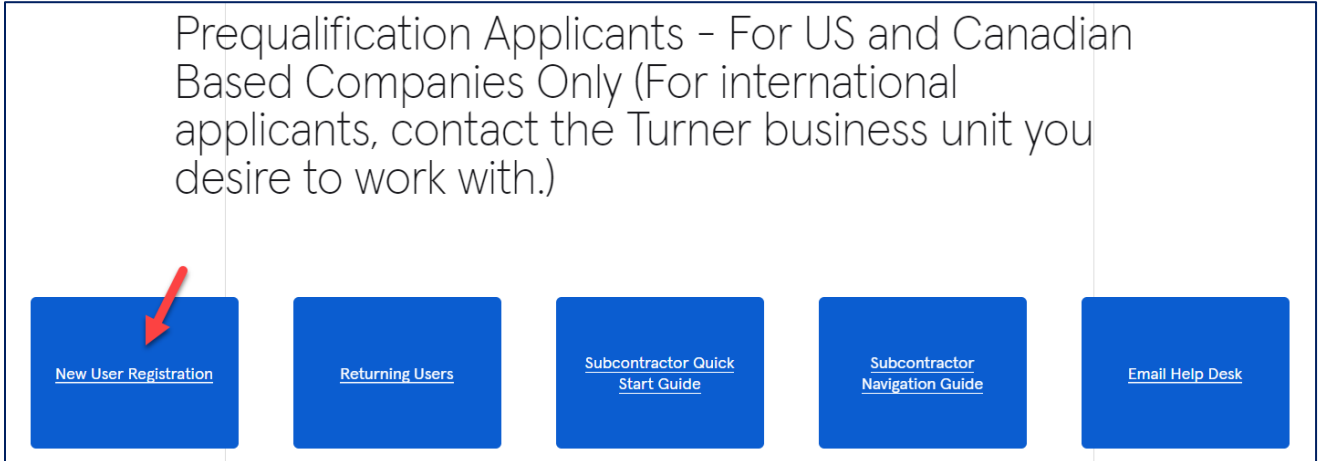
These methods have minor differences, but both follow the same processing guidelines. See below for additional information.

The "Subcontractor *APPLICATION* Form"

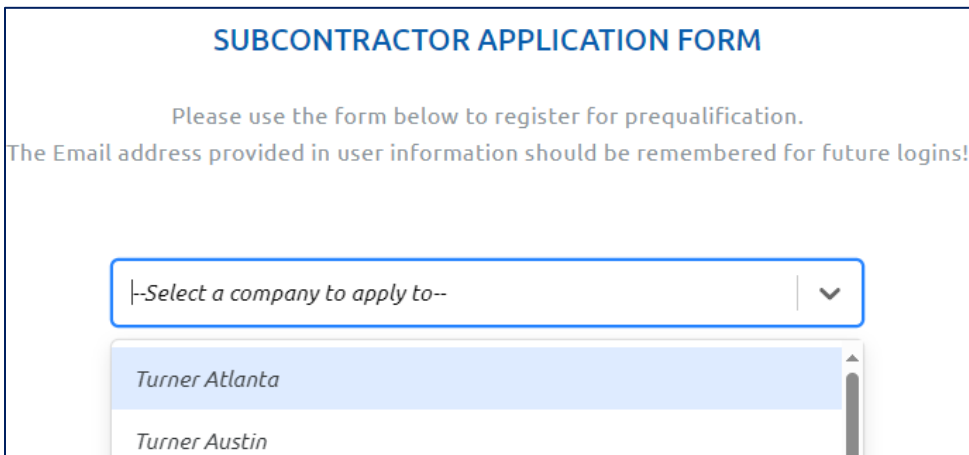
1. Go to turnerconstruction.com and click **Become a Subcontractor**.



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.

First Name: *	Last Name: *
Title *	Phone number: *
Email: *	
Please Create Password: *	Re-Type password: *

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,

- Register with the disregarded entity name and tax identification number.
- One main disregarded entity branch office can register as the "headquarters office."
- 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.

<p>Form W-9 (Rev. March 2024) Department of the Treasury Internal Revenue Service</p>	<p>Request for Taxpayer Identification Number and Certification</p> <p>Go to www.irs.gov/FormW9 for instructions and the latest information.</p>	<p>Give form to the requester. Do not send to the IRS.</p>
<p>Before you begin. For guidance related to the purpose of Form W-9, see <i>Purpose of Form</i>, below.</p>		
<p>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.)</p> <p>Holding Company Name</p>		
<p>2 Business name/disregarded entity name, if different from above.</p> <p>Disregarded Entity Name - (Tax ID ##-#####)</p>		
<p>Part I Taxpayer Identification Number (TIN)</p> <p>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 <i>How to get a TIN</i>, later.</p> <p>Note: If the account is in more than one name, see the instructions for line 1. See also <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.</p>		
		<p>Social security number</p> <p>□ □ □ □ - □ □ - □ □ □ □ □ □</p> <p>OR</p> <p>Employer identification number</p> <p>□ □ - □ □ □ □ □ □ □ □</p>

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.

<p>Legal Name of Company: *</p> <p>Company Name ABC</p> <p>(per your W-9 or country specific equivalent)</p>	<p>Main Trade *</p> <p>Select...</p>
<p>Second Trade</p> <p>Select...</p>	<p>Third Trade</p> <p>Select...</p>
<p>Fourth Trade</p> <p>Select...</p>	<p>Fifth Trade</p> <p>Select...</p>

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

<p>State / Province: *</p> <p>Select...</p>	<p>Country: *</p> <p>United States</p>
<p>City: *</p> <p>Anytown</p>	<p>Address: *</p> <p>123 Main Street</p>
<p>Postal Code: *</p> <p>*****</p>	<p>Tax ID *</p> <p>00-0000000</p>

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####.

<p>Country: *</p> <p>United States</p>	<p>Country: *</p> <p>Canada</p>
<p>Address: *</p> <p>123 Main Street</p>	<p>Address: *</p> <p>123 Main Street</p>
<p>Tax ID *</p> <p>11-1111111</p>	<p>Sales Tax Reg. Number (GST) *</p> <p>111111111RT0001</p>

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

You must agree to our **User Agreement** before continuing

I agree to the User Agreement

SUBMIT

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.

i

Success

The registration was successful. Please log in and complete the prequalification process.

Accept

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.

i

Error

The company is already registered with "Turner Atlanta", please contact your admin.

Accept

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.

The screenshot shows a form with fields for COMPANY, ADDRESS, and PHONE. To the right, a dropdown menu titled "SELECT A HIRING CLIENT" is open, showing a list of clients: Hathaway Dinwiddie, Big-D Construction, Clark Richardson and Biskup, Del Amo Construction, Hathaway Dinwiddie, PENTA, and Turner Southern California. A red arrow points to the dropdown arrow icon.

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.


The screenshot shows the "New Subcontractor / Vendor Prequalification Form V2" interface. On the left is a blue "Table of Contents" sidebar with sections for Page 1 (Company Details), Page 2 (Safety Details), Page 3 (For Canadian Companies Only), and Page 4 (Trade Details). The main content area shows the "Turner" logo and "Subcontractor/Vendor Prequalification Form" title. Below is the "Company Details" section with a checkbox to confirm information is for the company headquarters, and fields for "Legal Name of Company" and "Federal EIN# or country-specific equivalent".


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.

The screenshot shows the "Underrepresented Business Enterprise (UBE) Classifications / Certifications" section. It contains two questions, both marked with an asterisk as required: "Do you have any UBE classification?" and "Did you graduate from Turner's School of Construction Management?". Below each question are radio buttons for "Yes" and "No". A red callout box points to the asterisked question, stating: "Before you can proceed to the next page, all fields with an asterisk must be filled". At the bottom of the form, there are "Save" and "Next" buttons. A red callout box points to the "Save" button, stating: "Click 'Save' at the bottom of each page before moving to a new 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.

Please attach your company's W-9 or country specific equivalent. British Columbia: Provide a sample Invoice showing GST/HST Number & Legal Name. Ontario: Provide a Form 1000 or Sample Invoice showing HST number & Legal Name. *

File Name	Size
 File 2.pdf	33.35 kB

 Drop files to attach, or [browse](#)

[Example GST Register Form and Form 1000](#)

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.

Page 1 Page 2 Page 3 Page 4 Page 5 Page 6 Page 7 Page 8 Page 9 Page 10 Page 11

Certification

We hereby certify that we have answered all of the above questions in a truthful, accurate, and complete manner to assure that our answers (including those answers that may have been copied in from an earlier submission) are not in any respect false or misleading either by expressing ourselves in a misleading or ambiguous manner or omitting information and we also certify that all attachments submitted by us in connection with this prequalification are true, accurate, and full copies of the original documents that are in our possession. We recognize that Turner will be relying on the truthfulness and accuracy of our responses to this questionnaire and of the contents of the attachments hereto in deciding whether to permit us to bid as well as in any awards of work that may be made to our Company. **Additionally, we agree to promptly notify Turner in writing of any events or circumstances that make any of the foregoing answers, attachments, or representations untrue, incomplete, or inaccurate in any material respect.**

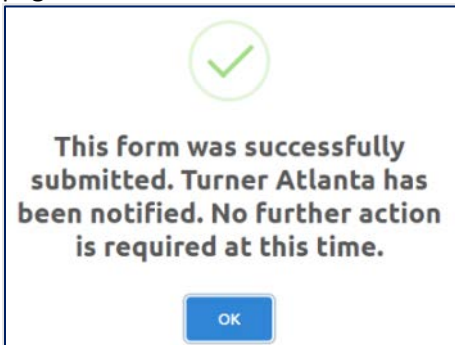
This prequalification has been reviewed by the following officer of our company prior to submittal.

Officer: * Date: *

Title: *

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 Vertical 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**.

UPLOAD NEW FILE

Click to select/upload a file

Please select a file

This file contains financial data: Check this box to identify a confidential file

Please select a Form this file belongs to:

No Form

If the file is to a specific form, use the dropdown. Otherwise, no action is needed.

File Description:

Enter a brief description of file

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**.

FORMS	FILES	LOCATIONS				2 DOWNLOAD
<input type="checkbox"/>	1	FILE NAME	FILE DESCRIPTION	UPLOAD DATE	EXPIRATION DATE	UPLOAD TYPE
<input checked="" type="checkbox"/>		Bank Credit Letter.docx	Field Name:BankCreditLetterAttachment	September 14, 2022 @ 22:0:51	N/A	Form
<input checked="" type="checkbox"/>		EMR 09 2021 - 09 2022 .pdf	Field Name:EMRLetterAttachment	September 14, 2022 @ 21:46:53	N/A	Form
<input checked="" type="checkbox"/>		Financial PDF File .pdf	Field Name:FinAuditReviewAttachment	September 14, 2022 @ 21:57:37	N/A	Form
<input type="checkbox"/>		OSHA Log - 2020.xlsx	Field Name:OSHA Log Attachment before	September 14, 2022 @ 21:49:14	N/A	Form

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.

Vertikal PROFILE IS_SUB_EMO

Back

Subcontractor

Associated Subcontractors

Update Information - here

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.

FORM NAME	FINUPDATE	FORM SUBMISSION ID	START DATE	SUBMISSION DATE	STATUS		
Turner Subcontractor / Vendor Prequalification Form		21847	September 14, 2022	September 14, 2022	Complete	FORM SUBMISSION	USERS LOG
Turner Subcontractor / Vendor Prequalification Form		21854	September 16, 2022		Incomplete	FORM SUBMISSION	AUTO-FILL FROM USERS LOG

PLEASE SELECT ELIGIBLE FORM TO COPY DATA PREVIOUSLY SUBMITTED TO DIFFERENT HIRING CLIENT

Hiring Client: --Select Hiring Client--
--Select Hiring Client--
Turner Atlanta

No results found for this search criteria

PLEASE SELECT ELIGIBLE FORM TO COPY DATA PREVIOUSLY SUBMITTED TO DIFFERENT HIRING CLIENT

Hiring Client: Turner Atlanta

NAME	SUBMISSIONDATE	STATUS	
Turner Subcontractor / Vendor Prequalification Form	September 14, 2022	Complete	AUTO-FILL FROM

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

Copy Submission

The form submission will be copied and the existing data in the destination form may be cleared/replaced

Yes! Cancel

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.

Form Copy Success!

Please review and complete the form. It's required to fill out all required fields before you can make a submission. Please ensure all fields are accurate and click Submit at the bottom of the last page. Thank you.

Fill Out Form

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 *****