Vertikal Subcontractor Navigation Guide

Version 001: March 2023

Contents

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 to for review.
2. A user account must have a unique email address.
3. For confidentiality and security reasons, a sole proprietor with their social security number as their tax identification cannot use the prequalification platform. Please 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. 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 reaching out to the other selected hiring clients with notice of application submission, providing those Procurement departments the opportunity to review your application as well.

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 endorsements 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* • EGS Program • Published environmental targets • Modern slavery and human trafficking statement and / or policy • Business Ethic 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 an Account

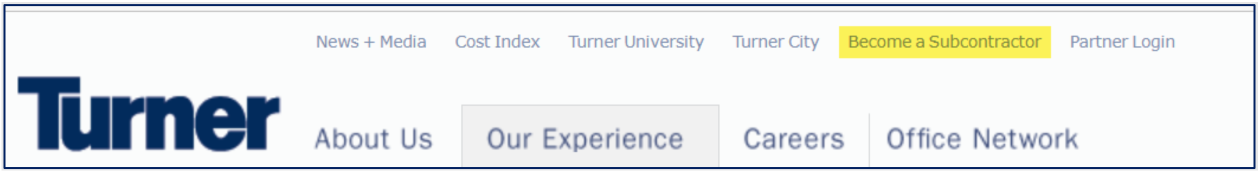
There are two ways a company can create a user account:

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

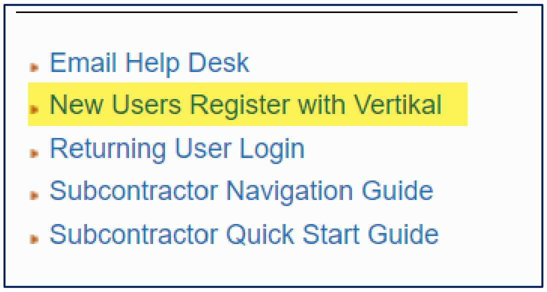
These methods have minor differences, but both follow the same processing guidelines. See below for additional information.

The "Subcontractor *Application* Form"

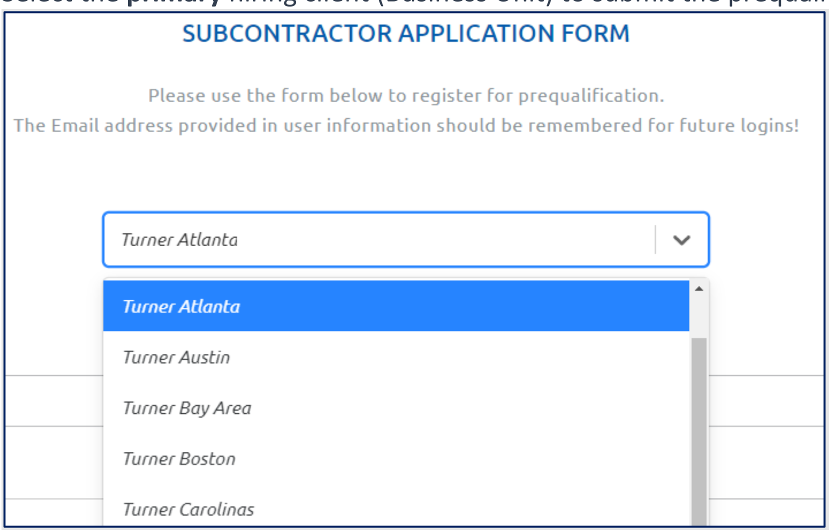
1. Go to turnerconstruction.com and click **Become a Subcontractor.**



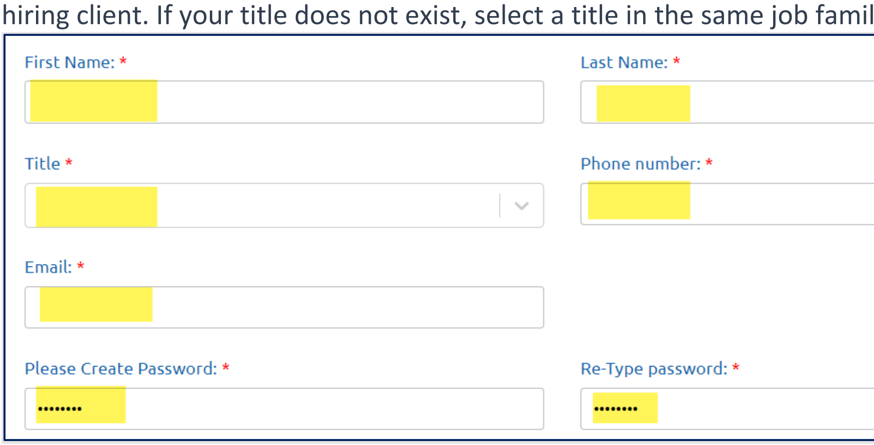
2. Scroll to the bottom of the page, and click "**New Users Register with Vertikal**."



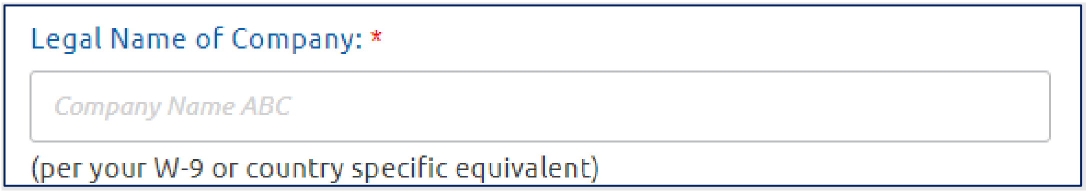
3. Select the **primary** hiring client (Business Unit) to submit the prequalification form and documents to review.



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 a title 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.



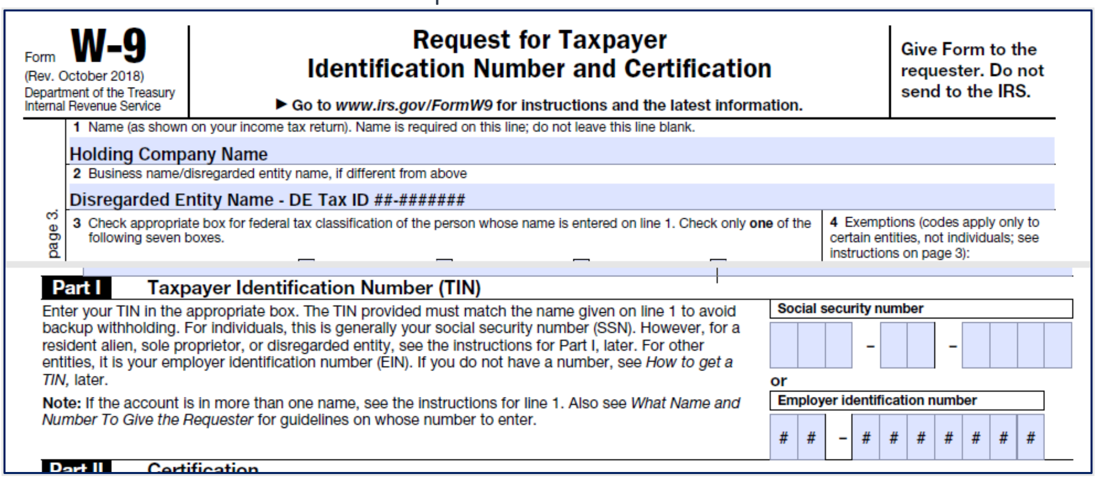
Legal Name of Company: *

Company Name ABC

(per your W-9 or country specific equivalent)

Note: For a disregarded entity company,

- 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.



Form **W-9** (Rev. October 2018) 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.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

Holding Company Name

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

Disregarded Entity Name - DE Tax ID ##-#######

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

page 3.

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. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

– –

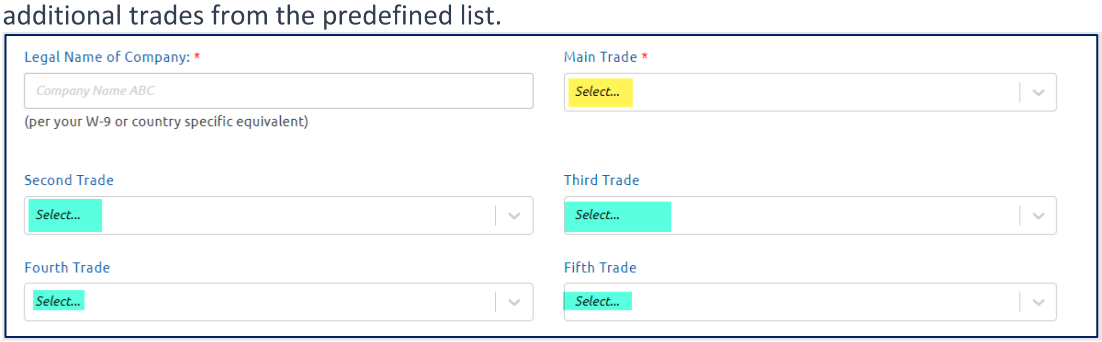
or

Employer identification number

– # # # # # #

Part II Certification

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...

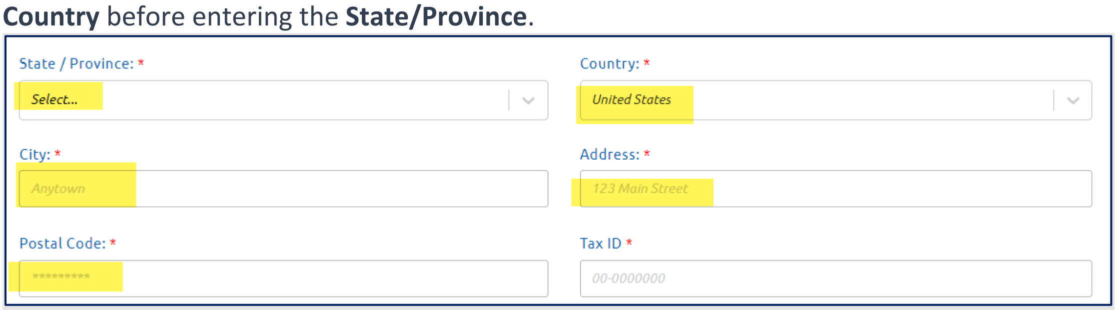
Fourth Trade

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

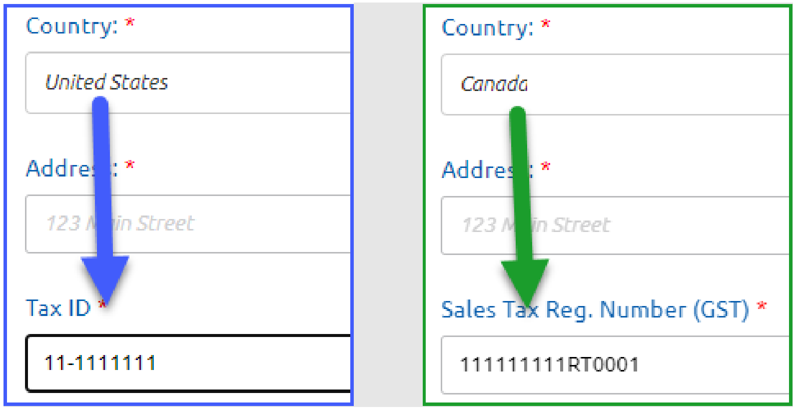
Postal Code: *

****

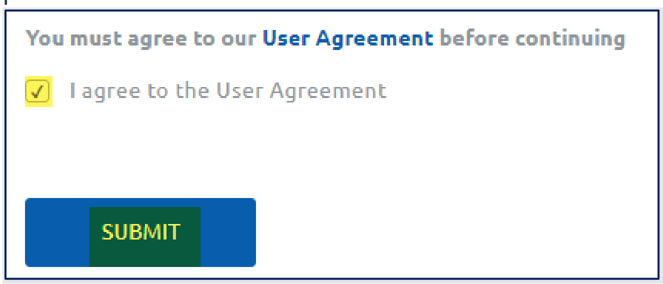
Tax ID *

00-0000000

8. For US companies, enter your nine-digit tax identification number without the dash "-". For Canadian companies, enter your fifteen-digit Sales Tax Registration Number (GST). 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.

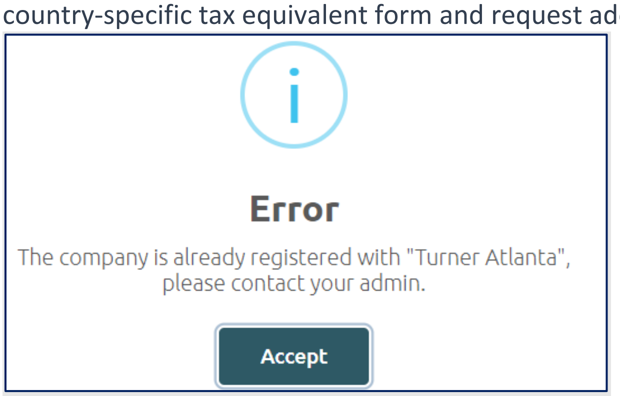


The "Subcontractor *Registration* Form"

Use the registration link in the email you received to access Turner's third-party prequalification platform. Follow the guidelines outlined in the **Subcontractor Application Form** instructions. Because the hiring client sent you an invitation, item No 2 from the above does not apply.

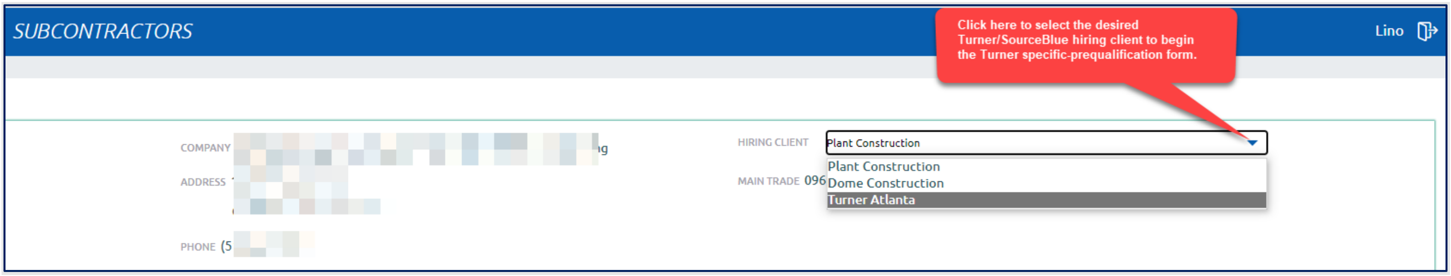
With the successful registration, you will see the pop-up below. Click **Accept**, and you'll be redirected to your company's Subcontractor Prequalification Account.

If registration is unsuccessful, the pop-up below will appear; email servicedesk@tcco.com with a copy of your W9 or country-specific tax equivalent form and request additional assistance.



Subcontractor Prequalification Account

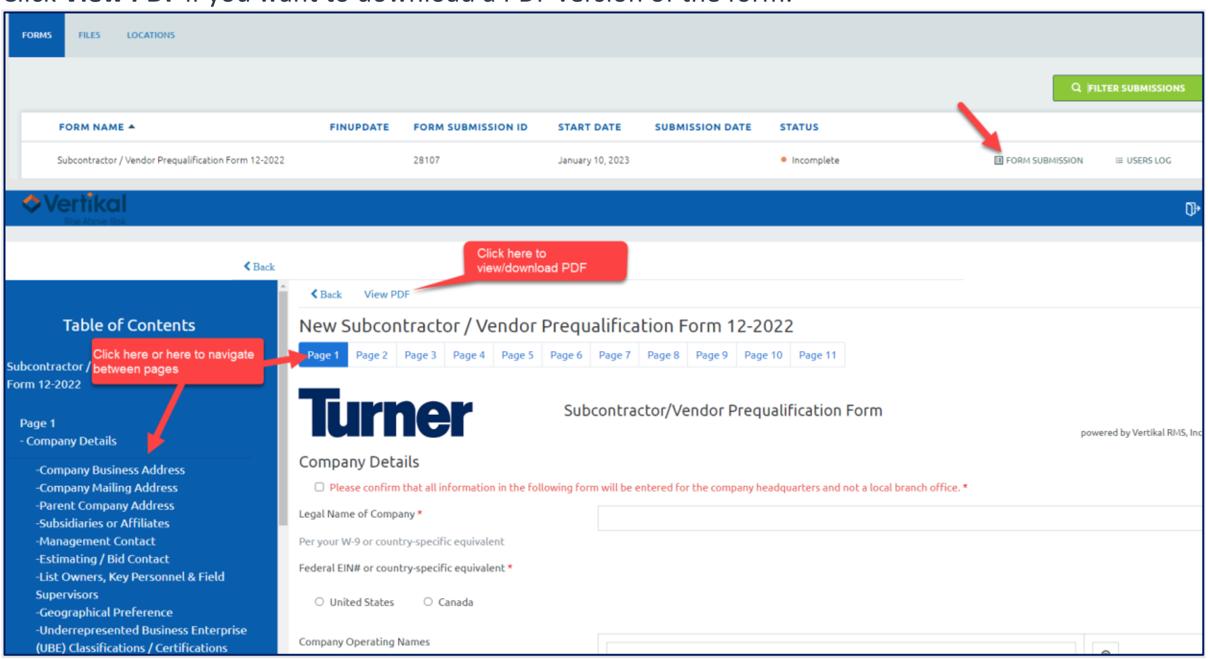
After completing the registration process successfully, you will be redirected to your company's prequalification account. If your company already utilizes Vertikal's prequalification platform with another general contractor ("Hiring Client"), click the arrow next to the Hiring Client to toggle and select the desired Turner/ SourceBlue hiring client to complete and submit Turner's specific-prequalification form.



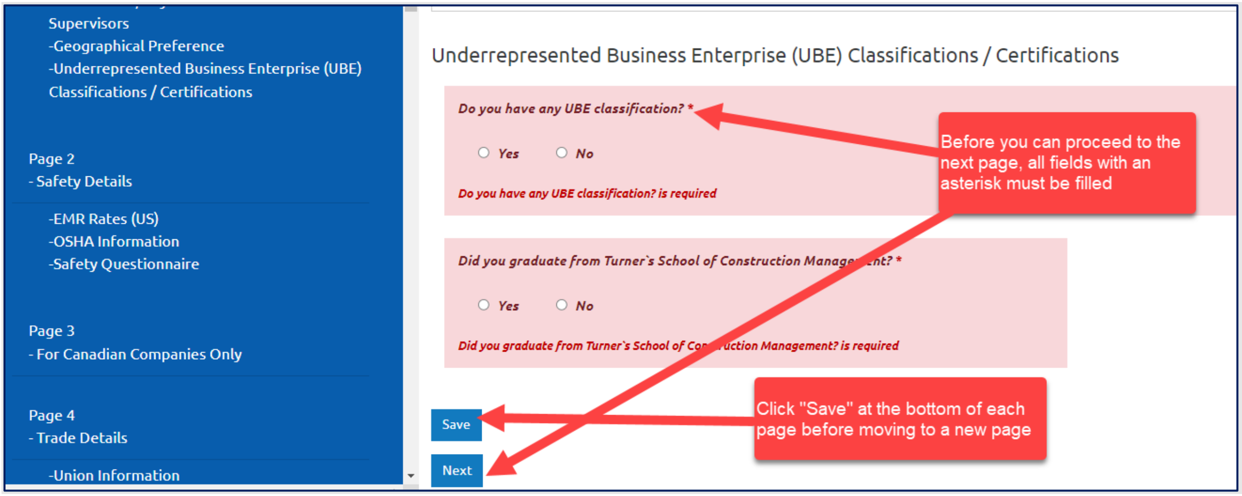
Complete the Prequalification Form

The system auto-saves your entries every two minutes. However, a 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** if you want to download a PDF version of the form.

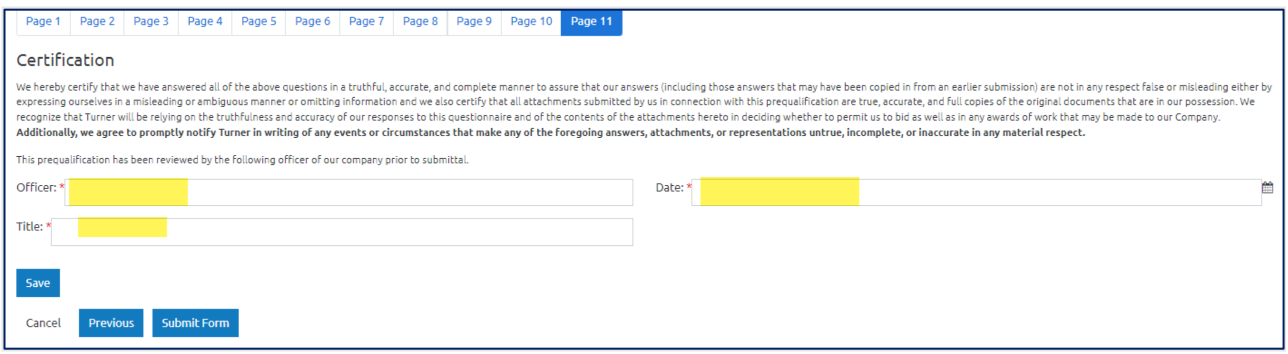


5. When clicking the **Next** button, the page will freeze if a required field is missed, or a document is not uploaded. Scroll up to review the missed required field or document to resolve and proceed to the next page.



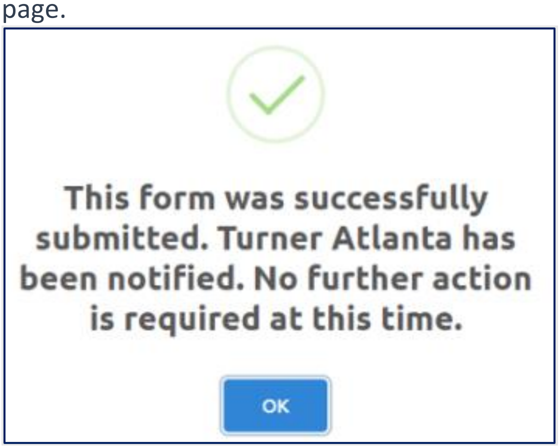
6. To upload a file, you can drag and drop files or click the **Browse** button to select a file. The max file size is 30 MB.

7. After completing all the required fields and uploading documents where indicated, complete the **Certification** section and click **Submit 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.

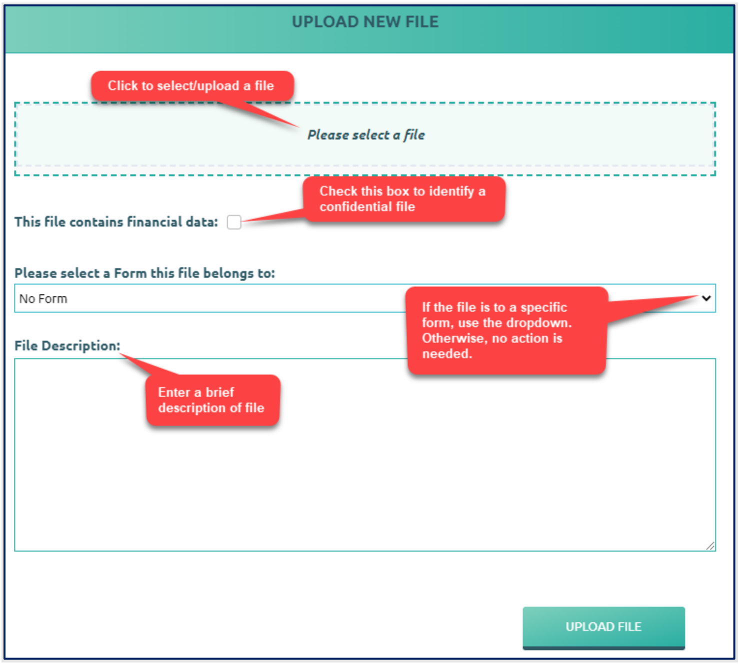
8. If the submission is successful, the below message will show. Click **OK** to exit the form and get back to the home page.



Upload / Download Files

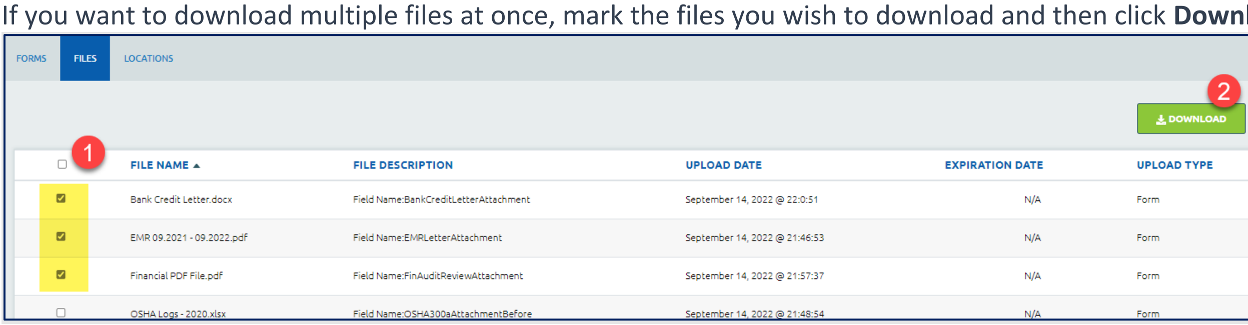
After submitting a form, you can upload additional files if needed.

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. If the file belongs to a specific Prequalification Form, select the form in the drop-down.
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:

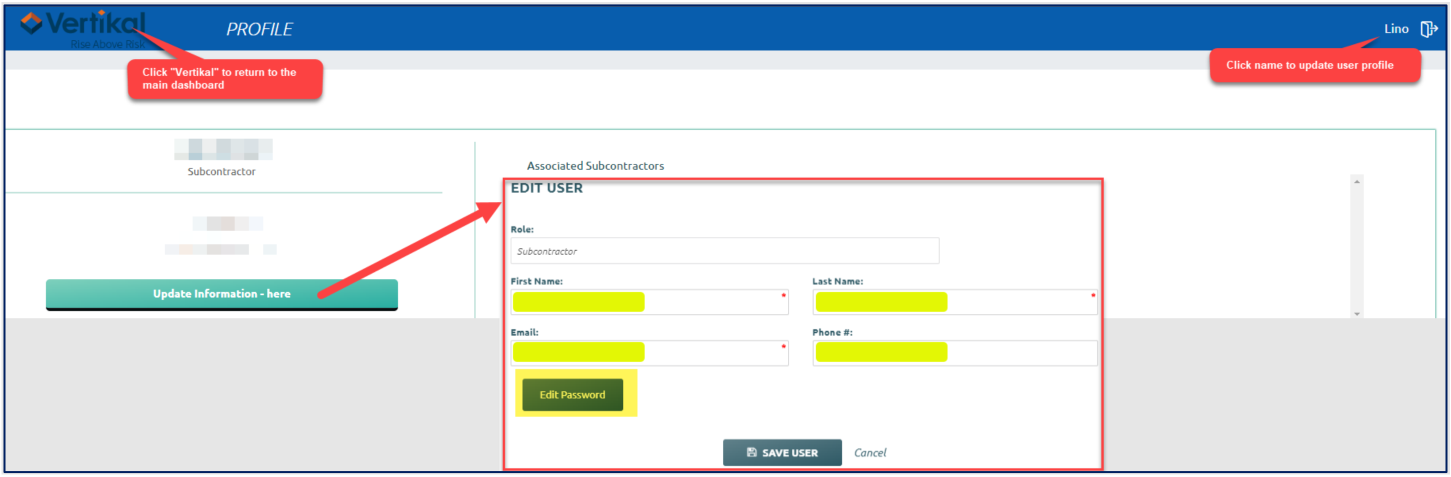
1. If you want to open one individually file, click **View.**
2. If you want to download multiple files at once, mark the files you wish to download and then click **Download**.



Change Your User Information

To change your user information, first, log into Vertikal. Click your name in the top right corner of the screen. And click the **Update Information – here** button.

To update your password, click **Edit Password**. Click **Save User** to save your changes and exit the window.
To return to the Main Page, click the Vertikal logo at the top left of the screen.



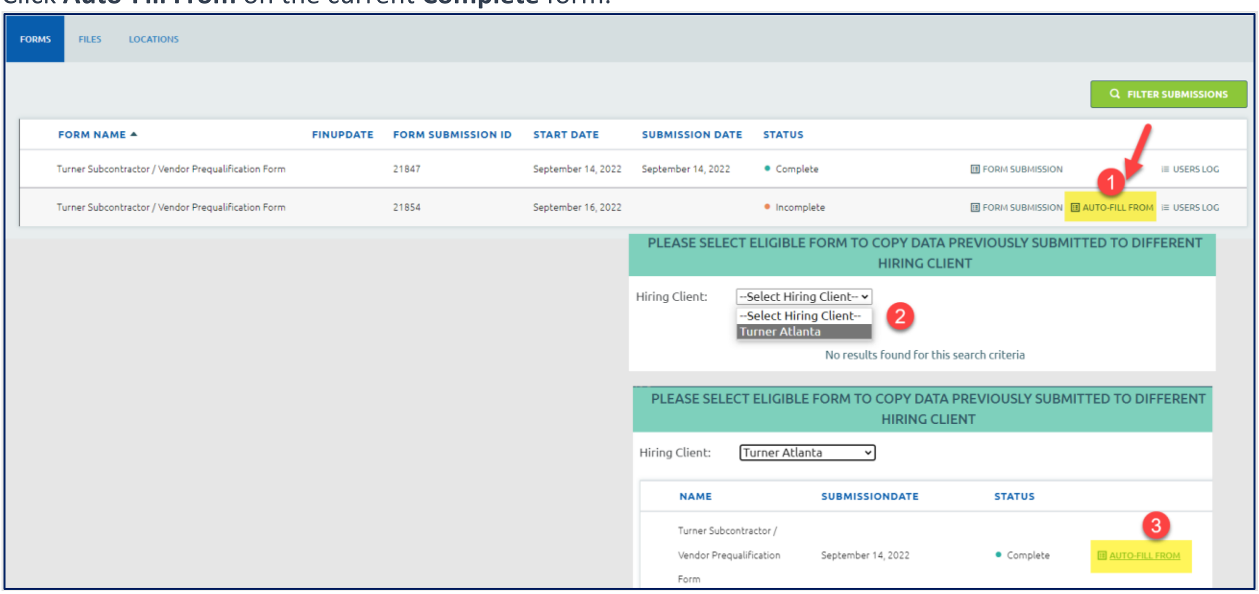
Prequalification Form Renewal – Auto-Fill From Option

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.

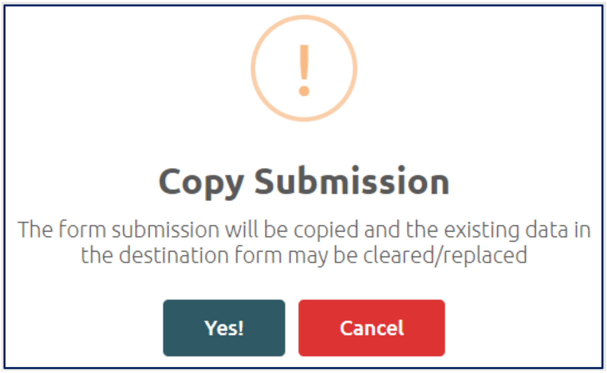
At the time of renewal, a system-generated email will be sent to all applicants' company staff with a user account. Click on the URL link in the renewal email to access the login page to begin the renewal process.

The **Auto-Fill Form** option will show automatically if the renewal is eligible to autofill specific fields in the new form. If the auto-fill option is unavailable, complete the form from the beginning.

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

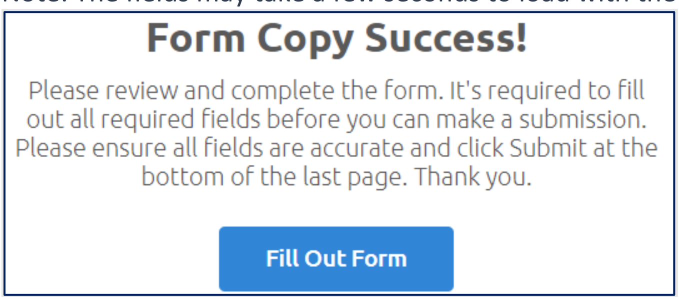


4. Click **Yes** to confirm you want to copy data from the selected source form.



5. Click **Fill Out Form** for the system to take you to the new form with 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, the company name and tax id must be entered at the bare minimum, and click the SAVE button. Failure to enter/save new information clears the auto-filled fields. If the auto-filled areas cleared when you log back in, you can either 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, UBE certifications, etc., may require yearly renewal. At the time of renewal for these specific documents, an automated email from Vertikal will be sent as a reminder to all user accounts associated with your company with instructions to upload the renewal documents. Follow the instructions in the email to upload the updated file(s) to support renewal.

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

*** **END** ***