



## Step-by-Step Guide

ONBOARDING QUESTIONNAIRE – SUBCONTRACTOR

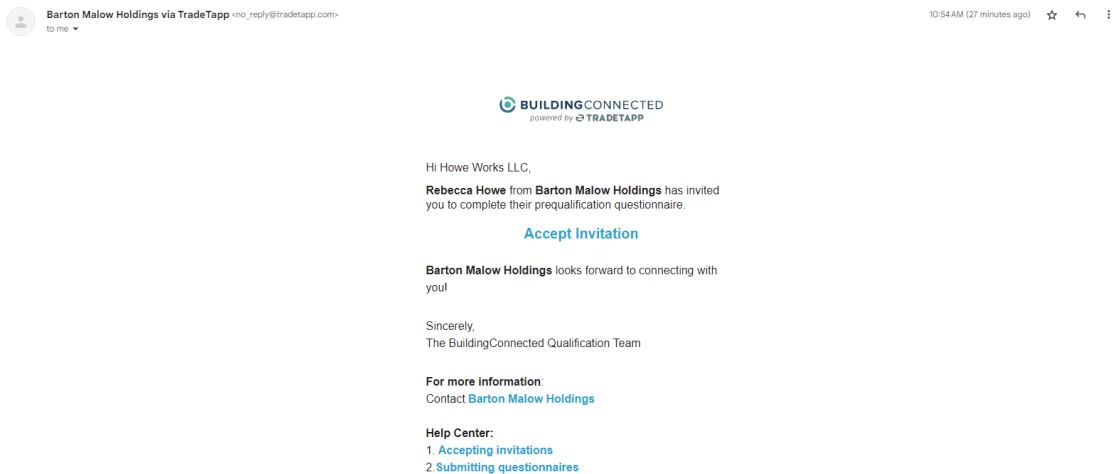
UPDATED SEPTEMBER 2023

**Barton  
Malow**

## SUBCONTRACTOR QUESTIONNAIRE

An invitation to complete an application will be sent to the contact you specify or is assigned as the default prequalification contact in BuildingConnected.

- Click on the "Accept Invitation" link in the center of the page.
- The invitation must be opened in Google Chrome.



## You will need an Autodesk ID to complete your application in BuildingConnected.

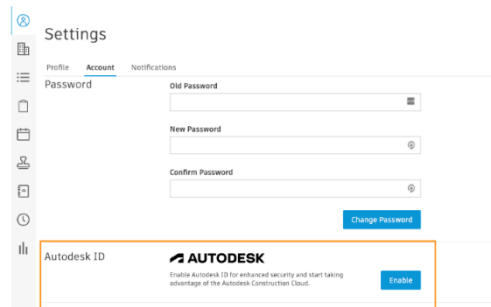
### **If you do NOT have an AUTODESK ID:**

- Create a [new account](#).
- Enter your email address and click "Create Account Using Autodesk ID."
- The system will verify your email address is not yet connected to an Autodesk ID. After verification, an account will be created immediately. Click "Continue to BuildingConnected".
- After creating a new account, you will need to verify your email address to access the "Qualifications" section. If you are linked to an existing company, you will also need to have your employment verified to access the "Qualifications" section. [Employment verification help](#).

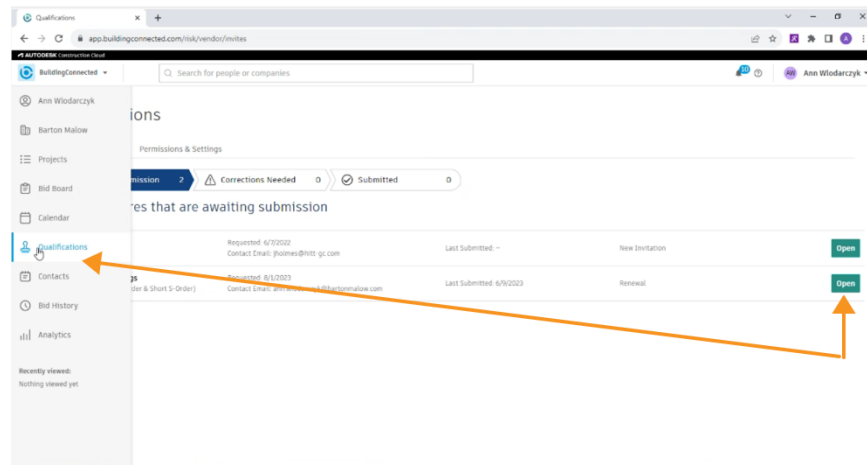
A screenshot of the BuildingConnected account creation page. At the top is the BuildingConnected logo, with the text "AN AUTODESK COMPANY" below it. The main heading is "Join BuildingConnected with Autodesk ID". Below this is a text input field labeled "Email". Underneath the input field is a large blue button with a white "A" icon and the text "Create Account Using Autodesk ID". At the bottom of the page, there is a small, faint link that says "Already have an account?".

## If you do have an AUTODESK ID:

- Connect your Autodesk ID in the "Account" tab in Settings. Select "Enable" In the "Autodesk ID" section.



- After you have created your account, log into BuildingConnected and click "Qualifications" in the left navigation menu.



## Is this your first submission or annual renewal?

- If this is your first submission, you will need the documents listed under "REQUIRED DOCUMENTS" to complete the application.
- If this is an *annual renewal*, you only need to update *the safety, financial, and insurance portions of the application*. The balance of your information is saved in the system and only requires updating if something has changed.

## REQUIRED DOCUMENTS

**\*\*If there is a required document that is not applicable to your organization, or you are unable to provide; upload a note on letterhead explaining why the document is unavailable.**

- W9 Form - the company name must exactly match our contract and your BuildingConnected profile
- Audited/reviewed financials from previous year
- OSHA 300/300 A Logs (past three years)
- EMR Letter (past three years)
- Safety Manual
- Letter from Bonding Company verifying you are good standing and providing Single and Aggregate Project limits.
- Current Insurance Certificates and additional insured forms CG2010 and CG2037

## Completing the Application

There are six (6) sections in the application.

The sections appear on the left-hand menu. (If you have previously applied, your previous data will be visible.)

### GENERAL SECTION

1. Begin by entering your company name. **(Important: You must type your company name exactly as it appears on your W9 form)**

Click "Continue" in the upper-right corner of each page to move on to the next question. **All questions must be answered before you can submit. A green check mark must be present for each section before moving on to the next section.**

The screenshot displays the BuildingConnected application interface. On the left, a sidebar menu lists six sections: General, Contacts, Projects, Safety, Insurance, Financial, and Review. The 'General' section is highlighted with a blue bar and a green checkmark, indicating it is complete. Below the menu is a 'Submit' button. The main content area shows a progress bar with 11 steps, where the first step is active. The question 'What is your company name?' is displayed, with a text input field containing 'Test BMH'. A 'Continue' button is located in the top right corner, with an orange arrow pointing to it. A 'Back' button is in the top left. A 'Question Tip' box at the bottom left provides instructions: 'Provide the full legal name of your company. If you are doing business under a different name than that listed on your W-9, enter as "Legal Name d/b/a Sample Name".'



2. Select currency – USD or Canadian Dollars

The screenshot shows a web browser window with the URL `app.buildingconnected.com/risk/vendor/form/206791/currency`. The page is titled "Barton Malow Holdings" and is part of an "Invitations" session. On the left, a sidebar menu lists sections: General (checked), Contacts, Projects, Safety, Insurance, Financial, and Review. A "Submit" button is at the bottom of the sidebar. The main content area has a heading "Select your currency." and a subtext "Your selection will apply to all questions in this application including financial document uploads." Below this is a "Currency\*" dropdown menu with "USD" selected. A "Continue" button is in the top right. A "Question Tip" box at the bottom left states: "Since all financial data must be provided in a single currency, please choose the currency of the financial statements you will be uploading with your submission."

3. Is your company a subsidiary or child to a parent company? If this does not apply to your company, click on the link highlighted in blue.

**\*A second screen will open, and you will need to click again to indicate this does not apply to your company. You can move on after you see, "You have indicated not applicable to this question."**

The screenshot shows the next screen in the form, titled "Is your company a subsidiary or child to a parent company?". The left sidebar is identical to the previous screen, but now includes a "Print Summary" button above the "Submit" button. The main content area has a heading "Is your company a subsidiary or child to a parent company?". Below the heading is a message box with the text "You have indicated not applicable to this question" and a blue link "Click here if this does apply to your company". An orange rectangle highlights this link. A "Continue" button is in the top right. A "Question Tip" box at the bottom left states: "Provide the full legal name of your parent company."

4. Identify the year and location of company foundation.

The screenshot shows a web browser window with the URL `app.buildingconnected.com/risk/vendor/form/206791/yearFounded`. The page is titled "Barton Malow Holdings" and is part of an "Invitations" series. On the left, a sidebar menu lists sections: General (checked), Contacts, Projects, Safety, Insurance, Financial, and Review. The main content area asks, "In what year and state/province was your company founded?". It features two input fields: "Year Founded\*" with the value "2018" and "State/Province Founded\*" with a dropdown menu showing "Michigan". Navigation buttons include "Back", "Continue", and "Print Summary". A "Submit" button is at the bottom of the sidebar.

5. Enter company business tax ID.

The screenshot shows the same web browser window, but the URL is `app.buildingconnected.com/risk/vendor/form/206791/ledTaxId`. The page title remains "Barton Malow Holdings". The sidebar menu is identical. The main content area asks, "Provide us your company's business tax ID.". It features two input fields: "Type" with a dropdown menu showing "US FEIN" (selected), "US FEIN", "CAN BN", "US SSN", and "Other"; and "Tax ID\*" with the value "123451234". Navigation buttons include "Back", "Continue", and "Print Summary". A "Submit" button is at the bottom of the sidebar. A "Question Tip" box at the bottom left states: "If you do not have a US Business Tax ID, please contact your tax advisor."

6. Enter the corporate address that matches W9 as well as addresses for additional company offices.

The screenshot shows a web browser window with the URL `app.buildingconnected.com/risk/vendor/form/206791/address`. The page is titled "Barton Malow Holdings" and is part of an "Invitations" sequence. The left sidebar contains a menu with "General" selected, and other options like "Contacts", "Projects", "Safety", "Insurance", "Financial", and "Review". The main content area asks "What is your company's address?" and states "This application requires at least 1 entry for this question." Below this, there are two sections: "Main Office" with the address "26500 American Drive, Southfield, Michigan, 48034" and "Other Offices" with the text "None Provided". There is an "Add New" button for other offices. A "Question Tip" box at the bottom left explains that if a company has multiple locations, it should provide the address for each. The top of the page shows a "Last saved" timestamp and a "Currency" dropdown set to "USD".

7. Identify trade work that your company performs.

The screenshot shows the same web browser window, but the URL is `app.buildingconnected.com/risk/vendor/form/206791/csiDiv`. The page is still titled "Barton Malow Holdings". The left sidebar menu is the same, but the "General" option is now selected. The main content area asks "What type of work do you normally perform?" and states "This application requires at least 1 entry for this question." Below this, there is a section titled "Your trades:" with a table of trade codes and descriptions. The table has two columns: the trade code and the description. The codes listed are "01 00 00 General Requirements", "01 10 00 Summary", "00 00 00 Procurement and Contracting Requirements", and "00 21 00 Instructions". Each row has an "X" button to the right. Below the table, there is a "Choose a division" dropdown menu. A "Question Tip" box at the bottom left explains that to add trades to the profile, the user should use the drop-down menus to select CSI codes for work the company performs. If they have trouble finding a particular specification, they should simply add the general category code for that trade. Remember to add all that apply.

Trade Code	Description	Action
01 00 00	General Requirements	X
01 10 00	Summary	X
00 00 00	Procurement and Contracting Requirements	X
00 21 00	Instructions	X

8. What markets does your company serve?

The screenshot shows a web browser window with the URL `app.buildingconnected.com/risk/vendor/form/206791/market`. The page is titled "Barton Malow Holdings" and is part of the "BuildingConnected" interface. On the left, there is a sidebar with a "General" tab selected, which includes sections for "Contacts", "Projects", "Safety", "Insurance", "Financial", and "Review". A "Submit" button is located at the bottom of this sidebar. A "Question Tip" box states: "To add markets served to your profile, click on any market sector for which your company has performed work. Remember to add all that apply." The main content area displays the question "What markets does your company normally serve?" with a note: "This application requires at least 1 entry for this question." Below the question is a "Your Markets\*" section with a dropdown menu. The dropdown is open, showing a list of market sectors: "Commercial", "Office & Interiors", "Cultural & Entertainment", "Education", "Energy", "Healthcare", and "Hospitality". The "Education" option is currently selected and highlighted in blue. A "Continue" button is located at the top right of the main content area.

9. Identify what region(s) your company serves.

The screenshot shows a web browser window with the URL `app.buildingconnected.com/risk/vendor/form/206791/region`. The page is titled "Barton Malow Holdings" and is part of the "BuildingConnected" interface. On the left, there is a sidebar with a "General" tab selected, which includes sections for "Contacts", "Projects", "Safety", "Insurance", "Financial", and "Review". A "Submit" button is located at the bottom of this sidebar. A "Question Tip" box states: "To add regions to your profile, use the drop-down menu to locate regions your company serves. Remember to add all that apply." The main content area displays the question "What regions does your company normally serve?" with a note: "This application requires at least 1 entry for this question." Below the question is a "Your Regions\*" section with a dropdown menu. The dropdown is open, showing a list of regions: "Michigan", "Alabama", "Alaska", "Alberta", "Arizona", and "Arkansas". The "Alabama" option is currently selected and highlighted in blue. A "Continue" button is located at the top right of the main content area.

10. Identify how many employees your company has.

The screenshot shows a web browser window with the URL `app.buildingconnected.com/risk/vendor/form/206791/employees`. The page is titled "Barton Malow Holdings" and is part of a multi-step form. The left sidebar shows a navigation menu with "General" selected. The main content area asks "How many employees does your company have?" and contains two input fields: "Number of Home Office Employees\*" with the value "12" and "Number of Field Supervisory Employees\*" with the value "1". A "Continue" button is in the top right, and a "Back" button is in the top left. A "Print Summary" button is in the top left of the main content area. A "Submit" button is at the bottom of the sidebar. A "Question Tip" box at the bottom left states: "Include only employees that are directly employed by your company. Do not include employees of subcontractors or suppliers."

11. Identify if your company has any enterprise business certifications. If this does not apply to your company, click on the link highlighted in blue.

**\*A second screen will open, and you will need to click again to indicate this does not apply to your company. You can move on after you see, "You have indicated not applicable to this question."**

The first screenshot shows the form titled "Does your company have any enterprise business certifications?". It includes a message: "This application requires at least 1 entry for this question." Below this, there is an "Add New" button and a link that says "Or select This doesn't apply to my company". The link is highlighted in blue. The second screenshot shows the same form after the link was clicked. A message box at the bottom states: "You have indicated not applicable to this question. Click here if this does apply to your company". The link is highlighted in blue. Both screenshots show the same sidebar and navigation elements as the previous form.

12. Identify company union affiliations. If this does not apply to your company, click on the link highlighted in blue.

**\*A second screen will open, and you will need to click again to indicate this does not apply to your company. You can move on after you see, "You have indicated not applicable to this question."**

The screenshot shows a web browser window with the URL `app.buildingconnected.com/risk/vendor/form/206791/union`. The page is titled "Barton Malow Holdings" and is part of the "BuildingConnected" system. On the left, there is a sidebar with a "Print Summary" button and a list of sections: General (checked), Contacts, Projects, Safety, Insurance, Financial, and Review. The "General" section is expanded, showing a "Submit" button and a "Question Tip" that says: "You may provide one or more union affiliations." The main content area displays the question: "Does your company have any union affiliations?" Below the question, it states: "This application requires at least 1 entry for this question." and "You have indicated not applicable to this question". A blue link is provided: [Click here if this does apply to your company](#). A "Continue" button is visible in the top right corner.

13. Identify professional licenses. If this does not apply to your company, click on the link highlighted in blue.

**\*A second screen will open, and you will need to click again to indicate this does not apply to your company. You can move on after you see, "You have indicated not applicable to this question."**

The screenshot shows a web browser window with the URL `app.buildingconnected.com/risk/vendor/form/206791/profLicenses`. The page is titled "Barton Malow Holdings" and is part of the "BuildingConnected" system. On the left, there is a sidebar with a "Print Summary" button and a list of sections: General (checked, 13/24), Contacts, Projects, Safety, Insurance, Financial, and Review. The "General" section is expanded, showing a "Submit" button and a "Question Tip" that says: "Please provide your company's professional licenses, such as your company's contractor license." The main content area displays the question: "Does your company have any professional licenses?" Below the question, it states: "This application requires at least 1 entry for this question." and "You have indicated not applicable to this question". A blue link is provided: [Click here if this does apply to your company](#). A "Continue" button is visible in the top right corner.

14. Answer nine questions.

The screenshot shows the 'Barton Malow Holdings' form in the BuildingConnected app. The 'General' section is active, showing nine questions with 'Yes' and 'No' buttons. A 'Question Tip' box is visible on the left.

Questions:

- Does your firm participate in design/build projects?\*
- Is your firm ISO Registered?\*
- Has your firm ever completed a certified LEED building?\*
- Does your firm utilize BIM?\*
- Does your company subcontract any work? If yes, please indicate which trades are NOT self-performed?\*
- Does your firm have a preferred Remit To Address? If so please enter that in this section.\*
- Click "Yes" to acknowledge Barton Malow's minimum Terms and Conditions, which will be included in our bid documents.\*

## CONTACTS SECTION

1. Identify Company and Prequalification Contacts. **\*Prequalification contact will become the default contact for all communication during this application and future renewals.**

The screenshot shows the 'Barton Malow Holdings' form in the BuildingConnected app, specifically the 'Contacts' section. The 'Contacts' tab is selected in the left sidebar. The main content area displays 'Who are your company contacts?' and 'This application requires at least 1 entry of each type.' Below this, there are two sections: 'Company contacts' and 'Prequalification contacts'. The 'Company contacts' section shows 'Kim Moore' as a contact. The 'Prequalification contacts' section shows 'Barton Malow' as a contact. An 'Add New' button is visible at the bottom right of the Prequalification contacts section. A 'Question Tip' box is visible on the left.

Who are your company contacts?

This application requires at least 1 entry of each type.

Company contacts

- Kim Moore

Prequalification contacts

- Barton Malow

Add New

## PROJECTS SECTION

1. Provide your estimated backlog for projects in progress.

The screenshot shows the 'Backlog' form in the Autodesk BuildingConnected system. The left sidebar contains a navigation menu with 'Projects' selected. The main content area has a heading 'What is your current estimated backlog? Please provide your backlog *only* for projects currently in progress. Do not include completed projects.' Below this is a text input field labeled 'Current estimated backlog\*' with the value 'USD \$ 1,000.00'. A 'Continue' button is in the top right, and a 'Back' button is in the top left. A 'Question Tip' box at the bottom left explains that the backlog is the total value of uncompleted work committed to via written contract.

Invitations  
Barton Malow Holdings

General  
Contacts  
Projects  
Safety  
Insurance  
Financial  
Review

Submit

? Question Tip  
Backlog is the total value of uncompleted work that your company has committed to via written contract. You may estimate this value if necessary.

What is your current estimated backlog? Please provide your backlog *only* for projects currently in progress. Do not include completed projects.

Current estimated backlog\*  
USD \$ 1,000.00

Continue

2. Provide recently completed project references.

The screenshot shows the 'Completed Refs' form in the Autodesk BuildingConnected system. The left sidebar is the same as in the first screenshot. The main content area has a heading 'Provide references of **recently** completed projects.' followed by instructions: 'This application requires at least 3 completed project references. Please include any completed projects for the company requesting this application, if applicable.' Below this is a table with the heading 'Largest project completed in the past 5 years - test (2022)'. The table has five rows, each with a project name and a date. An 'Add New' button is above the table. A 'Continue' button is in the top right, and a 'Back' button is in the top left. A 'Question Tip' box at the bottom left explains that references must include the largest project completed within the last five years.

Invitations  
Barton Malow Holdings

General  
Contacts  
Projects  
Safety  
Insurance  
Financial  
Review

Submit

? Question Tip  
The references provided in this question must include the largest project your company has completed within the last five years. Be sure to include any additional projects completed for the firm requesting this application.

Provide references of **recently** completed projects.

This application requires at least 3 completed project references.  
Please include any completed projects for the company requesting this application, if applicable.

Largest project completed in the past 5 years - test (2022)

Add New

test (2022)	
test 1 (2022)	
test 2 (2022)	
test 3 (2022)	
test 4 (2022)	

Continue



3. Provide any additional references desired. (Example: owner or contractor reference letter) If you do not have any, upload a blank piece of paper.

The screenshot shows the 'Project References' form in the BuildingConnected application. The left sidebar contains a navigation menu with sections: General, Contacts, Projects (selected), Safety, Insurance, Financial, and Review. The main content area is titled 'Provide any additional project reference documents.' and includes a 'Document upload\*' section with a 'Choose Files' button. Below this, a file named 'Material Supplier - prequal document.docx' is listed. A 'Question Tip' box at the bottom left explains that users can upload additional project references. The top of the page shows the user's name 'Ann Włodarczyk' and a search bar.

## SAFETY SECTION

1. Provide 3 years of company EMR information.

The screenshot shows the 'EMR' (Experience Modification Rate) form in the BuildingConnected application. The left sidebar is identical to the previous form, with 'Safety' selected. The main content area is titled 'Provide your company's most recent EMR scores.' and includes an 'Add New' button. Below this, a table displays the company's EMR scores for the years 2023 and 2020. The table has two columns: 'Year' and 'EMR Score'. The data is as follows:

Year	EMR Score
2023	0.00
2020	2.25

A 'Question Tip' box at the bottom left explains that the EMR is calculated by the insurance provider based on claim and loss results, and is typically found in a letter from the insurance carrier. The top of the page shows the user's name 'Ann Włodarczyk' and a search bar.

2. Provide 3 years of company OSHA results and OSHA 300 logs. Click ADD NEW to add one year at a time.

The screenshot shows the 'Barton Malow Holdings' profile page in the BuildingConnected app. The 'Safety' tab is selected in the left sidebar. The main content area displays the OSHA 300 form with the heading 'Provide your company's OSHA 300 results and OSHA 300A logs.' and a note that the application requires at least 3 entries. A table lists the years 2023, 2022, and 2021, each with checkboxes for 'Add' and 'Delete'. The 'Add New' button is highlighted with an orange box and an orange arrow points to it.

Below the screenshot, the 'Add OSHA 300 Year' modal form is shown. It contains the following fields:

- Year\*
- Total Number of Deaths (G)\*
- Total Number of Cases with Days Away (H)\*
- Total Number of Cases with Restriction/Transfer (I)\*
- Other Recordable Cases (J)\*
- Total Number of Hours Worked\*
- Upload File\* (with a 'Choose Files' button)

A 'Save' button is located at the bottom right of the modal.

### 3. Upload Company Safety Manual.

The screenshot shows the BuildingConnected interface for Barton Malow Holdings. The left sidebar contains a navigation menu with sections: General, Contacts, Projects, Safety (selected), Insurance, Financial, and Review. The 'Safety' section is active, and a 'Submit' button is visible. The main content area displays a question: 'Provide us a copy of your company's current safety manual'. Below the question, it states 'This application requires at least 1 entry for this question.' and there is an 'Add New' button. A table with one row is visible, showing the year '2023'. A 'Question Tip' box at the bottom left of the sidebar provides instructions: 'Provide the most recent version of your company safety manual and indicate the year it was last updated.'

### 4. Answer two safety questions.

The screenshot shows the BuildingConnected interface for Barton Malow Holdings, specifically the 'Safety' section. The left sidebar is the same as in the previous screenshot, with 'Safety' selected. The main content area displays the heading 'Please answer the following question(s)'. There are two questions, each with 'Yes' and 'No' buttons: 'Click "Yes" to acknowledge Barton Malow's Subcontractor Terms and Conditions, which will be included in our bid documents.\*' and 'Click "Yes" to acknowledge Barton Malow's Safety Manual, which will be included in our bid documents.\*'. A 'Question Tip' box at the bottom left of the sidebar provides instructions: 'If provided, hover your mouse over the help icon shown after any question in the list for additional information. Please be sure to include an additional explanation or detail to your response when prompted.'

## INSURANCE SECTION

1. Enter details on current insurance policies. **\*\*DO NOT UPLOAD COPIES OF INSURANCE POLICIES IN THIS STEP. YOU WILL UPLOAD THE INSURANCE PACKAGE IN STEP 3. PROVIDE POLICY LIMITS, CARRIER NAME AND POLICY EXPIRATION DATES IN THIS STEP. If you have any questions regarding insurance, submit a ticket to RMHelpDesk@bartonmalow.com.**

The screenshot shows the BuildingConnected web application interface for Barton Malow Holdings. The main form is titled "What are the details of your current insurance policies?". It lists several insurance types: Automobile Liability, General Liability, Umbrella/Excess, and Workers' Compensation. A modal window titled "Add insurance coverage" is open, displaying the following fields:

- Type\*: Automobile Liability
- Per occurrence limit\*: USD \$ 1,000,000.00
- Aggregate limit\*: USD \$ 1,000,000.00
- Carrier\*: Other/Not Listed
- Policy expiration\*: 12/31/2023
- Upload file: Choose Files
- Save

A "Question Tip" box is also visible, stating: "If the general contractor makes certain coverages required in their application, you will see them pre-populated in the question for you to complete. You may select the Click if not applicable option for any coverage that your company does not carry. In addition, be sure to update any expired coverage, as indicated by the Update Needed prompt."

2. Provide broker contact information.

The screenshot shows the 'brokerContact' form in the BuildingConnected system. The left sidebar contains a navigation menu with 'Insurance' selected. The main content area has a title 'Who is the broker or agency contact for your insurance programs?' and a progress indicator. The form fields are: 'Broker/Agency company name' (Test), 'Contact full name' (test), 'Contact phone number' ((123) 456-7890), and 'Contact email' (test@sample.com). A 'Question Tip' box states: 'Provide the primary brokerage point of contact for your insurance programs.' Buttons for 'Print Summary', 'Back', 'Continue', and 'Submit' are visible.

3. Upload a copy of your complete insurance package. A complete insurance package includes a current insurance certificate and additional insured endorsement forms CG2010 and CG2037.

The screenshot shows the 'insuranceCert' form in the BuildingConnected system. The left sidebar has 'Insurance' selected. The main content area has a title 'Provide us a copy of your current certificate(s) of insurance.' and a progress indicator. A table with one row for the year '2022' is shown, with an 'Add New' button. An 'Upload certificate' modal is open, showing a 'Year\*' field with '2022' and an 'Upload certificates\*' section with a 'Choose Files' button and a file named 'Material Supplier - prequal document.pdf'. A 'Save' button is at the bottom of the modal. A 'Question Tip' box at the bottom states: 'The certificate of insurance (or "COI") for this question should be a sample that indicates ability to provide coverage.'

4. Upload additional insured endorsements if not attached to complete insurance policy in Step 3. **\*If included in Step 3, upload a note stating endorsements are attached in step 3.**

BuildingConnected

Search for people or companies

Ann Włodarczyk

Invitations

Barton Malow Holdings

USD

Print Summary

Back

Continue

General

Contacts

Projects

Safety

Insurance

Financial

Review

Submit

Question Tip

Additional insured provisions from your insurance policies are used to verify coverage.

Provide us your additional insured endorsement(s) to all applicable policies

Add New

Upload Endorsement(s)

Year\*

Upload Endorsements\*

Choose Files

Save

2023

5. Provide waiver of subrogation for all policies. Required for General Liability, Auto & Workmen's Comp. **\*This may already be attached to your insurance policies. Upload a note stating waivers are attached in step 3.**

BuildingConnected

Search for people or companies

Ann Włodarczyk

Invitations

Barton Malow Holdings

Last saved: August 1, 2023 at 2:48 PM EDT

Currency in: USD

Print Summary

Back

Continue

General

Contacts

Projects

Safety

Insurance

Financial

Review

Submit

Please provide waivers of subrogation for all policies (if applicable)

Choose Files

Test.pdf

6. Provide surety program information.

The screenshot shows a web browser window with the URL `app.buildingconnected.com/risk/vendor/form/206791/suretyInfo`. The page is titled "Barton Malow Holdings" and "Invitations". The left sidebar contains a navigation menu with options: General, Contacts, Projects, Safety, Insurance (selected), Financial, and Review. The main content area is titled "What are the details of your surety/bonding program?". It contains several input fields: "Current surety company", "Broker agency company name", "Broker agency contact name", "Broker agency contact phone", "Single project bonding capacity" (with a "USD" dropdown), "Aggregate bonding capacity" (with a "USD" dropdown), and "Surety letter upload" (with a "Choose Files" button). A "Question Tip" box on the left states: "Provide the details of your current bonding program and brokerage contact. If a surety letter upload is required, you may also recognize this as a 'good guy' letter." The bottom of the sidebar has a "Submit" button.

7. Provide bonding rate.

The screenshot shows a web browser window with the URL `app.buildingconnected.com/risk/vendor/form/206791/custom1677`. The page is titled "Barton Malow Holdings" and "Invitations". The left sidebar is identical to the previous screenshot, with "Insurance" selected. The main content area is titled "Please provide your company's bonding rate." and contains a single input field labeled "Required field\*" with the value "0". A "Question Tip" box on the left states: "Do not include a percentage sign." The bottom of the sidebar has a "Submit" button.

## 8. Answer twelve insurance questions.

The screenshot shows the 'Insurance' section of the BuildingConnected portal for Barton Malow Holdings. The left sidebar contains a navigation menu with 'Insurance' selected. The main content area displays a list of twelve insurance-related questions, each with 'Yes' and 'No' response buttons. A 'Question Tip' box is visible on the left side of the main content area.

Please answer the following question(s).

Click "Yes" to download a sample certificate and Additional Insured forms that meet our requirements Insurance Documents for your reference.

Does your policy provide primary and non contributory coverage?*	Yes	No
Does your general liability policy provide on going and completed operations coverage?*	Yes	No
Does your policy have a residential exclusion?*	Yes	No
Do you own any company vehicles?*	Yes	No
Does your company perform any abatement, demolition or hauling of construction spoils? If yes, please provide your Pollution insurance certificate.* @	Yes	No
Does your company perform any type of design, engineering, surveying or consulting work? If yes, please provide your Professional Liability insurance certificate.* @	Yes	No
Click "Yes" to acknowledge Barton Malow's minimum Insurance Requirements, on pages 8 and 9, which will be included in our bid documents.*	Yes	No
Is your company currently approved for a surety/bonding program?	Yes	No

7 Question Tip  
If provided, hover your mouse over the help icon shown after any question in the list for additional information. Please be sure to include an additional explanation or detail to your response when prompted.

## FINANCIAL SECTION

### 1. Upload current W9 that is signed and dated within this calendar year.

The screenshot shows the 'Financial' section of the BuildingConnected portal for Barton Malow Holdings. The left sidebar contains a navigation menu with 'Financial' selected. The main content area displays a prompt to 'Provide your current IRS form W-9' and a table with two rows for the years 2023 and 2021. An 'Add New' button is visible above the table.

Provide your current IRS form W-9

This application requires at least 1 entry for this question.

Add New

2023	✓	🗑
2021	✓	🗑

7 Question Tip  
Provide your most recent IRS W-9 form and specify the year the form was signed.



## 2. Provide Annual Volume/Revenue

The screenshot shows the 'Add Annual Volume/Revenue' form in the BuildingConnected app. The form is titled 'Add Annual Volume/Revenue' and has a 'Year\*' field with '2022' entered. Below it is the 'Estimated Volume/Revenue\*' field, which is currently empty. The currency is set to 'USD' and the amount is '\$ 100.00'. There is a 'Save' button at the bottom right of the form. In the background, the main form for 'Barton Malow Holdings' is visible, showing a table with columns for 'Year', 'Volume/Revenue', and 'Currency'. The table has three rows: '2023 (USD \$100)', '2022 (USD \$100)', and '2013 (USD \$1)'. There are also checkboxes for each row. A 'Question Tip' box is visible on the left side of the main form, stating: 'Provide your historical annual volume/revenue. If necessary, you may use estimates. These values should generally match what appears on the Statement of Income from your company's annual financial statements.'

## 3. Upload audited/reviewed financials from the previous year.

The screenshot shows the 'Add financial statement' form in the BuildingConnected app. The form is titled 'Add financial statement' and has a 'Statement date\*' field with '5/1/2023' entered. Below it is the 'Statement type\*' field, which is currently empty. There is an 'Upload statement (PDF)\*' section with a 'Choose File' button and a 'Test.pdf' file listed. There is a 'Save' button at the bottom right of the form. In the background, the main form for 'Barton Malow Holdings' is visible, showing a table with columns for 'Year', 'Volume/Revenue', and 'Currency'. The table has three rows: '2023', '2022', and '2013'. There are also checkboxes for each row. A 'Question Tip' box is visible on the left side of the main form, stating: 'Your most recent annual CPA reviewed or audited statements are strongly preferred. If you provide a compiled or incomplete financial statement, your application may be rejected.'

#### 4. Answer one financial question.

The screenshot shows the BuildingConnected portal for Barton Malow Holdings. The left sidebar contains a navigation menu with sections: General, Contacts, Projects, Safety, Insurance, Financial (highlighted), and Review. The main content area displays a question: "Do you wish to prequalify for a contract limit greater than \$300,000?\*" with "Yes" and "No" buttons. A "Continue" button is in the top right. A "Print Summary" button is in the top left. A "Question Tip" box at the bottom left explains that hovering over a question icon provides additional information.

Please answer the following question(s).

Do you wish to prequalify for a contract limit greater than \$300,000?\*

Yes No

Continue

Print Summary

Question Tip

If provided, hover your mouse over the help icon shown after any question in the list for additional information. Please be sure to include an additional explanation or detail to your response when prompted.

#### Review

Review the application prior to submission.

The screenshot shows the BuildingConnected portal for Barton Malow Holdings in the review stage. The left sidebar has the "Review" section highlighted. The main content area displays the message: "Review responses before submitting. Please finalize any incomplete required questions as indicated below. When complete, click Submit. All currency is in USD." Below this, a table lists completed questions with checkboxes for each.

Review responses before submitting

Please finalize any incomplete required questions as indicated below

When complete, click Submit

All currency is in USD

Completed
General
What is your company name? Test BMM
Select your currency. USD
Is your company a subsidiary or child to a parent company?
In what year and state/province was your company founded? Year Founded: 2018 State/Province Founded: Michigan
Provide us your company's business tax ID. US FEIN: 323450234

When the review is complete, verify all sections have green checks and click on SUBMIT.

**ALL GREEN CHECKS REQUIRED TO SUBMIT**

Review responses before submitting  
Please finalize any incomplete required questions as indicated below  
(When complete, click Submit)  
All currency is in USD

Completed

General

What is your company name?  
Barton Malow Holdings

Enter your currency.  
USD

Is your company a subsidiary or child to a parent company?  
No

In what year and state/province was your company founded?  
Year Founded: 2018  
State/Province: Michigan

Provide us your company's business tax ID.  
US FICN: 22545224

Submit

The submission is successful when this message is visible.

Thanks! Your application has been successfully submitted

Return to Invites

If you have any questions or need assistance with a question, email the Risk Management team at [RMHelpDesk@Bartonmalow.com](mailto:RMHelpDesk@Bartonmalow.com).

If you encounter technical issues, click on the question mark at the upper right-hand corner to enter the BuildingConnected Help Desk.



## Step-by-Step Guide

ONBOARDING QUESTIONNAIRE – PROFESSIONAL SERVICE

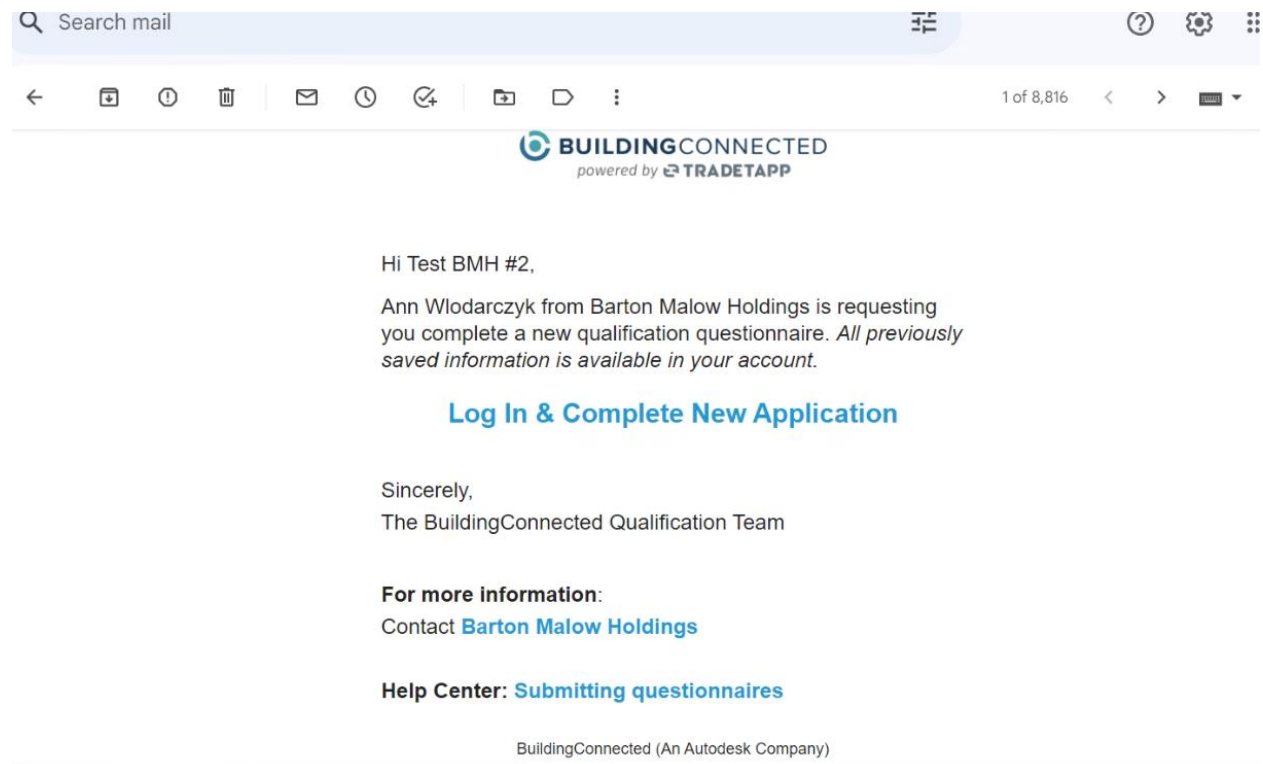
UPDATED SEPTEMBER 2023

**Barton  
Malow**

## PROFESSIONAL SERVICES QUESTIONNAIRE

An invitation to complete an application will be sent to the contact you specify or is assigned as the default prequalification contact in BuildingConnected.

- Click on the blue box link in the center of the page.
- The invitation must be opened in Google Chrome.



### You will need an Autodesk ID to complete your application in BuildingConnected.

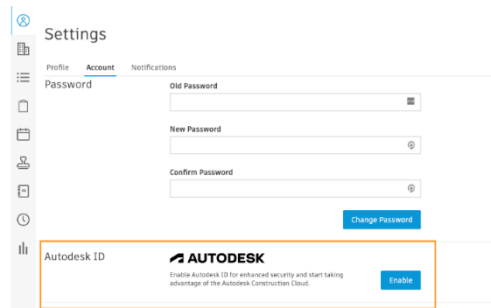
#### If you do NOT have an AUTODESK ID:

- Create a [new account](#).
- Enter your email address and click "Create Account Using Autodesk ID."
- The system will verify your email address is not yet connected to an Autodesk ID. After verification, an account will be created immediately. Click "Continue to BuildingConnected".
- After creating a new account, you will need to verify your email address to access the "Qualifications" section. If you are linked to an existing company, you will also need to have your employment verified to access the "Qualifications" section. [Employment verification help](#).

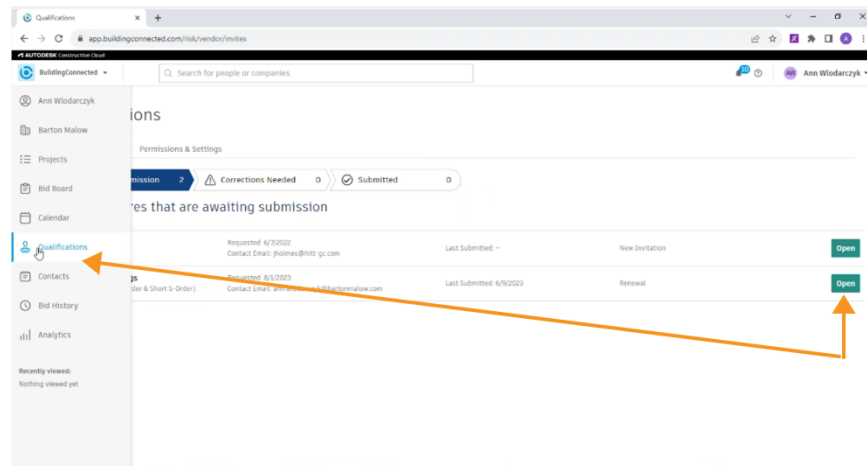
A screenshot of a web form for creating a BuildingConnected account. At the top is the BuildingConnected logo with the text "AN AUTODESK COMPANY". Below the logo is the heading "Join BuildingConnected with Autodesk ID". There is a text input field labeled "Email". Below the input field is a large blue button with a white "A" icon and the text "Create Account Using Autodesk ID". At the bottom of the form, there is a link that says "Already have an account?".

## If you do have an AUTODESK ID:

- Connect your Autodesk ID in the "Account" tab in Settings. Select "Enable" In the "Autodesk ID" section.



- After you have created your account, log into BuildingConnected and click "Qualifications" in the left navigation menu.



## Is this your first submission or annual renewal?

- If this is your first submission, you will need the documents listed under "REQUIRED DOCUMENTS" to complete the application.
- If this is an *annual renewal*, you only need to update *the safety, financial, and insurance portions of the application*. The balance of your information is saved in the system and only requires updating if something has changed.

## REQUIRED DOCUMENTS

**\*\*If there is a required document that is not applicable to your organization, or you are unable to provide; upload a note on letterhead explaining why the document is unavailable.**

- W9 Form - the company name must exactly match our contract and your BuildingConnected profile
- Audited/reviewed financials from previous year
- OSHA 300/300 A Logs (past three years)
- EMR Letter (past three years)
- Safety Manual
- Current Insurance Certificates and additional insured forms CG2010 and CG2037

## Completing the Application

There are five (6) sections in the application.

The sections appear on the left-hand menu. (If you have previously applied, your previous data will be visible.)

### GENERAL SECTION

1. Begin by entering your company name. **(Important: You must type your company name exactly as it appears on your W9 form)**  
Click "Continue" in the upper-right corner of each page to move on to the next question. **All questions must be answered before you can submit. A green check mark must be present for each section before moving on to the next section.**

The screenshot displays the BuildingConnected application interface. The top header shows the company name "Barton Malow Holdings" and the user "Ann Mote". The left sidebar contains a menu with sections: General (13/14), Contacts (0/2), Projects (0/2), Safety (3/4), Insurance (5/6), Financial (0/0), and Review. The main content area is titled "What is your company name?" and features a text input field labeled "Company name\*" with the value "Test BMH #2". A "Back" button is on the left and a "Continue" button is on the right. A "Print Summary" button is also visible in the sidebar. A "Question Tip" box at the bottom left states: "Provide the full legal name of your company. If you are doing business under a..."

2. Select currency – USD or Canadian Dollars

The screenshot shows the BuildingConnected application interface. On the left, a sidebar lists various sections: General (13/14), Contacts, Projects (0/2), Safety (3/4), Insurance (5/6), Financial, and Review. The 'General' section is currently selected. The main content area displays the title 'Barton Malow Holdings' and a progress bar. Below the title, it says 'Last saved: August 17, 2023 at 10:50 AM EDT' and 'Currency in: USD'. A 'Print Summary' button is visible. The main question is 'Select your currency.' with a subtext: 'Your selection will apply to all questions in this application including financial document uploads.' A dropdown menu for 'Currency\*' is set to 'USD'. A 'Continue' button is in the top right corner.

3. Is your company a subsidiary or child to a parent company? If this does not apply to your company, click on the link highlighted in blue.

**\*A second screen will open, and you will need to click again to indicate this does not apply to your company. You can move on after you see, "You have indicated not applicable to this question."**

The first screenshot shows the question 'Is your company a subsidiary or child to a parent company?' with a text input field for 'Parent company name\*' containing 'Barton Malow Holdings'. A 'Continue' button is in the top right corner. The second screenshot shows the same question, but with a message box that says 'You have indicated not applicable to this question' and a blue link 'Click here if this does apply to your company'. The 'Continue' button is still visible in the top right corner.



4. Identify the year and location of company foundation.

The screenshot shows the Autodesk BuildingConnected interface for 'Invitations' under the user 'Ann Mote'. The company name is 'Barton Malow Holdings'. The left sidebar shows progress for various sections: General (13/14), Contacts (0/2), Projects (0/2), Safety (3/4), Insurance (5/6), Financial (5/6), and Review. The main content area is titled 'In what year and state/province was your company founded?'. It contains two input fields: 'Year Founded\*' with the value '2023' and 'State/Province Founded\*' with a dropdown menu showing 'Michigan'. A 'Continue' button is in the top right, and a 'Back' button is in the top left of the main area. A 'Print Summary' button is in the sidebar.

5. Enter company business tax ID.

This screenshot shows the same Autodesk BuildingConnected interface, but the main content area is titled 'Provide us your company's business tax ID.'. It features two input fields: 'Type' with a dropdown menu showing 'US FEIN' and 'Tax ID\*' with the value '339999999'. A 'Continue' button is in the top right, and a 'Back' button is in the top left of the main area. The sidebar remains the same. A 'Question Tip' box is visible at the bottom left, stating: 'If you do not have a US Federal Tax Identification Number, IRS Form 990-C.'.

6. Enter the corporate address that matches W9 as well as addresses for additional company offices.

The screenshot shows the 'What is your company's address?' form in the Autodesk BuildingConnected interface. The form is titled 'What is your company's address?' and includes a note: 'This application requires at least 1 entry for this question.' The form has two main sections: 'Main Office' and 'Other Offices'. The 'Main Office' section has a text input field containing '154 S Vernon St, Dearborn, Michigan, 48124' and a checkbox that is checked. The 'Other Offices' section has a text input field containing 'None Provided' and an 'Add New' button. The form is part of a multi-step process, with a 'Continue' button at the top right and a 'Back' button at the top left. The left sidebar shows the 'General' tab selected, with a progress indicator showing 13/14 steps completed. A 'Question Tip' box at the bottom left states: 'If your company has multiple locations, provide the address'.

7. Identify trade work that your company performs.

The screenshot shows the 'What type of work do you normally perform?' form in the Autodesk BuildingConnected interface. The form is titled 'What type of work do you normally perform?' and includes a note: 'This application requires at least 1 entry for this question.' The form has a section titled 'Your trades:' with two text input fields. The first field contains '10 30 00 Fireplaces and Stoves' and the second field contains '06 08 00 Commissioning of Wood, Plastics, and Composites'. Below the 'Your trades:' section, there are two dropdown menus: 'Choose a division' and 'Choose a specification (optional)'. The 'Choose a division' dropdown is set to '13 00 00 Special Construction'. The 'Choose a specification (optional)' dropdown is empty. A button at the bottom right says 'Click to add: 13 00 00 Special Construction'. The form is part of a multi-step process, with a 'Continue' button at the top right and a 'Back' button at the top left. The left sidebar shows the 'General' tab selected, with a progress indicator showing 13/14 steps completed. A 'Question Tip' box at the bottom left states: 'To add trades to your profile, use the drop-down menus to select CSI codes for work your company performs. If you have trouble finding a particular specification, simply add the general category code for that trade.'

8. What markets does your company serve?

The screenshot shows the AUTODESK Construction Cloud interface for Barton Malow Holdings. The left sidebar contains a navigation menu with 'General' (13/34), 'Contacts', 'Projects' (0/2), 'Safety' (3/4), 'Insurance' (5/6), 'Financial', and 'Review'. The main content area displays the question 'What markets does your company normally serve?' with a note that at least 1 entry is required. Below the question is a dropdown menu labeled 'Your Markets\*' with selected options: 'Civic & Government', 'Aviation', 'Healthcare', 'Hospitality', 'Commercial', 'Retail', 'Concrete & Heavy Civil', and 'Residential'. A 'Continue' button is in the top right, and a 'Back' button is in the top left of the main area. A 'Print Summary' button is in the sidebar. A 'Question Tip' box at the bottom left explains that users should click on any market to add it to their profile.

9. Identify what region(s) your company serves.

The screenshot shows the AUTODESK Construction Cloud interface for Barton Malow Holdings, specifically the 'What regions does your company normally serve?' question. The left sidebar is identical to the previous screenshot. The main content area displays the question with a note that at least 1 entry is required. Below the question is a dropdown menu labeled 'Your Regions\*' with selected options: 'Michigan' and 'Massachusetts'. A 'Continue' button is in the top right, and a 'Back' button is in the top left of the main area. A 'Print Summary' button is in the sidebar. A 'Question Tip' box at the bottom left explains that users should use the drop-down menu to locate and select their company's regions.

10. Identify how many employees your company has.

The screenshot shows the Autodesk BuildingConnected interface for Barton Malow Holdings. The left sidebar contains a navigation menu with 'General' (13/14), 'Contacts', 'Projects' (0/2), 'Safety' (3/4), 'Insurance' (5/6), 'Financial', and 'Review'. The main content area displays the question 'How many employees does your company have?'. Below the question are two input fields: 'Number of Home Office Employees\*' with the value '1' and 'Number of Field Supervisory Employees\*' with the value '3'. A 'Continue' button is located in the top right corner. A 'Question Tip' box at the bottom left states: 'Include only employees that are directly employed by your company. Do not include...'

11. Identify if your company has any enterprise business certifications. If this does not apply to your company, click on the link highlighted in blue.

**\*A second screen will open, and you will need to click again to indicate this does not apply to your company. You can move on after you see, "You have indicated not applicable to this question."**

The first screenshot shows the Autodesk BuildingConnected interface for Barton Malow Holdings. The left sidebar contains a navigation menu with 'General' (12/14), 'Contacts', 'Projects' (0/2), 'Safety' (3/4), and 'Insurance' (5/6). The main content area displays the question 'Does your company have any enterprise business certifications?'. Below the question is a message: 'This application requires at least 1 entry for this question.' There is an 'Add New' button and a link that says 'Or select This doesn't apply to my company'. A 'Continue' button is located in the top right corner.

The second screenshot shows the same interface, but the 'Continue' button is highlighted with a red box. Below the question, a message box states: 'You have indicated not applicable to this question. Click here if this does apply to your company'. A 'Question Tip' box at the bottom left states: 'Provide your enterprise business status as granted by the US DOT and other...'

12. Identify company union affiliations. If this does not apply to your company, click on the link highlighted in blue.

**\*A second screen will open, and you will need to click again to indicate this does not apply to your company. You can move on after you see, "You have indicated not applicable to this question."**

Autodesk Construction Cloud

BuildingConnected

Invitations

Barton Malow Holdings

Last saved: August 25, 2023 at 10:20 AM EDT

Currency in: USD

Print Summary

General 13/14

Contacts 0/2

Projects 0/2

Safety 3/4

Insurance 5/6

Financial 0/2

Review

Submit

? Question Tip

You may provide one or more union affiliations.

Does your company have any union affiliations?

This application requires at least 1 entry for this question.

You have indicated not applicable to this question

Click here if this does apply to your company

Continue

13. Identify professional licenses. If this does not apply to your company, click on the link highlighted in blue.

**\*A second screen will open, and you will need to click again to indicate this does not apply to your company. You can move on after you see, "You have indicated not applicable to this question."**

Autodesk Construction Cloud

BuildingConnected

Invitations

Barton Malow Holdings

Last saved: August 25, 2023 at 10:20 AM EDT

Currency in: USD

Print Summary

General 13/14

Contacts 0/2

Projects 0/2

Safety 3/4

Insurance 5/6

Financial 0/2

Review

Submit

? Question Tip

Please provide your company's professional licenses, such as your

Does your company have any professional licenses?

This application requires at least 1 entry for this question.

You have indicated not applicable to this question

Click here if this does apply to your company

Continue

#### 14. Answer nine questions.

This screenshot shows the first step of a prequalification form for Barton Malow Holdings. The left sidebar contains a navigation menu with 'General' selected, followed by 'Contacts', 'Projects', 'Safety', 'Insurance', 'Financial', and 'Review'. The main content area is titled 'Please answer the following question(s).' and contains nine questions, each with 'Yes' and 'No' radio button options. A 'Continue' button is in the top right corner. A 'Back' button is in the top left corner. A 'Question Tip' box is located in the bottom left of the main content area.

Invitations  
Barton Malow Holdings

Last saved: August 25, 2023 at 10:27 AM EDT  
Currency: USD

Back

Continue

Please answer the following question(s).

Did your Company name and/or FEIN change? IMPORTANT! If you change your company name or FEIN from what was previously shown, you MUST send an email to RM@buildingconnected.com. Please explain the reason for the change. This will affect our accounting system and will result in your company not being paid properly or timely.

Does your firm participate in design/build projects?

Is your firm ISO Registered?

Has your firm ever completed a certified LEED building?

Does your firm utilize BIM?

Does your company subcontract any work? If yes, please indicate which trades are NOT self-performed?

Does your firm have a preferred Remit To Address? If so please enter that in this section.

Click "Yes" to acknowledge Barton Malow's minimum Terms and Conditions, which will be included in our bid documents.

Click "Yes" to acknowledge Barton Malow's Business Associate Code of Conduct. Business Associate Code of Conduct?

7 Question Tip  
If provided, move your mouse over the help icon above after any question in the list for additional information. Please be sure to include an additional explanation or detail to your response when prompted.

#### CONTACTS SECTION

1. Identify Company and Prequalification Contacts. **\*Prequalification contact will become the default contact for all communication during this application and future renewals.**

This screenshot shows the second step of the prequalification form for Barton Malow Holdings. The left sidebar is the same as in the previous screenshot, but 'Contacts' is now selected. The main content area is titled 'Who are your company contacts?' and includes a note: 'This application requires at least 1 entry of each type.' There are two sections: 'Company contacts' with one entry 'Kim Moore' and 'Prequalification contacts' with one entry 'Barton Malow'. Each entry has edit and delete icons. An 'Add New' button is at the bottom. A 'Back' button is in the top left and a 'Continue' button is in the top right. A 'Question Tip' box is in the bottom left.

Invitations  
Barton Malow Holdings

Back

Continue

Who are your company contacts?

This application requires at least 1 entry of each type.

Company contacts

Kim Moore

Prequalification contacts

Barton Malow

Add New

7 Question Tip  
Provide the principals, officers, or executives as Company Contacts, and the point(s) of contact for prequalification related correspondence as Prequalification Contacts. A single person may be added as both.

## PROJECTS SECTION

1. Provide references of recently completed projects.

The image displays two screenshots of the Autodesk Construction Cloud interface, specifically the 'Projects' section for Barton Malow Holdings.

**Top Screenshot:** The 'Provide references of recently completed projects' screen. The left sidebar shows the 'Projects' tab selected. The main content area displays the instruction: "Provide references of recently completed projects. This application requires at least 5 completed project references. Please include any completed projects for the company requesting this application, if applicable." Below this, it states "Largest project completed in the past 5 years - Reno Work (2023)". A list of references is shown, with "Reno Work (2023)" listed. A "Continue" button is visible in the top right corner.

**Bottom Screenshot:** The 'Add project reference' modal form. The form contains the following fields:

- Project name\*
- Location\*
- Completion year\*
- Subcontract value\* (USD \$)
- Subcontract scope\*
- Reference contact company\*
- Reference contact name\*
- Reference contact phone\*
- Reference contact email\*

A "Continue" button is visible in the top right corner of the modal.

2. Provide any additional references desired. (Example: owner or contractor reference letter) If you do not have any, upload a blank piece of paper.

Autodesk Construction Cloud

BuildingConnected

Invitations

Barton Malow Holdings

Last saved: August 25, 2023 at 10:32 AM EDT

Currency in: USD

Print Summary

General

Contacts

Projects

Safety

Insurance

Financial

Review

Submit

Question Tip

Upload any file with additional project references that you would like to submit

Provide any additional project reference documents.

Document upload\*

Choose Files

CDA Blank.doc

## SAFETY SECTION

1. Provide 3 years of company EMR information.

Autodesk Construction Cloud

BuildingConnected

Invitations

Barton Malow Holdings

USD

Print Summary

General

Contacts

Projects

Safety

Insurance

Financial

Review

Submit

Question Tip

Experience Modification Rate (EMR) is calculated by your insurance provider based on claim and loss results. The rating is typically found in a letter from the insurance

Provide your company's most recent EMR scores.

Add New

2022 (0.89)



2. Provide 3 years of company OSHA results and OSHA 300 logs. Click ADD NEW to add one year at a time.

Autodesk BuildingConnected

Invitations

Barton Malow Holdings

USD

Print Summary

Back

Continue

General

Contacts

Projects

Safety 3/4

Insurance 5/6

Financial

Review

Submit

Provide your company's OSHA 300 results and OSHA 300A logs.

Add New

2023

Year\*

2023

Total Number of Deaths (G)\*

0

Total Number of Cases with Days Away (H)\*

0

Total Number of Cases with Restriction/Transfer (I)\*

0

Other Recordable Cases (J)\*

0

Total Number of Hours Worked\*

200

Upload File\*

Choose Files

Save

? Question Tip

For most companies, OSHA requires annual submissions of recordable injuries or incidents via the 300A form. Input the values directly from your OSHA 300A forms to

3. Upload Company Safety Manual.

Autodesk BuildingConnected

Invitations

Barton Malow Holdings

USD

Print Summary

Back

Continue

General

Contacts

Projects

Safety 3/4

Insurance 5/6

Financial

Review

Submit

Provide us a copy of your company's current safety manual

Add New

? Question Tip

Provide the most recent version of your company safety manual and indicate the year it was last updated.

#### 4. Answer two safety questions.

The screenshot shows the 'Safety' section of the Barton Malow Holdings profile in the Autodesk Construction Cloud interface. The left sidebar lists various sections: General, Contacts, Projects, Safety (3%), Insurance (5/6), Financial, and Review. The main content area displays two questions that need to be answered:

- Click "Yes" to acknowledge Barton Malow's Safety Manual, which will be included in our bid documents.\*
- Click "Yes" to acknowledge Barton Malow's Professional Services Terms and Conditions, which will be included in our bid documents.\*

Each question has 'Yes' and 'No' buttons. A 'Continue' button is located at the top right of the main content area. A 'Question Tip' box at the bottom left provides instructions on how to use the help icon.

### INSURANCE SECTION

1. Enter details on current insurance policies. **\*\*DO NOT UPLOAD COPIES OF INSURANCE POLICIES IN THIS STEP. YOU WILL UPLOAD THE INSURANCE PACKAGE IN STEP 3. PROVIDE POLICY LIMITS, CARRIER NAME AND POLICY EXPIRATION DATES IN THIS STEP. If you have any questions regarding insurance, submit a ticket to [RMHelpDesk@bartonmalow.com](mailto:RMHelpDesk@bartonmalow.com).**

The screenshot shows the 'Insurance' section of the Barton Malow Holdings profile. The left sidebar lists various sections: General, Contacts, Projects, Safety, Insurance (5/6), Financial, and Review. The main content area displays a table of current insurance policies:

Insurance Policy	Details
Automobile Liability	<input checked="" type="checkbox"/> <input type="checkbox"/>
General Liability	<input checked="" type="checkbox"/> <input type="checkbox"/>
Umbrella/Excess	<input checked="" type="checkbox"/> <input type="checkbox"/>
Workers' Compensation	<input checked="" type="checkbox"/> <input type="checkbox"/>
Professional Liability	<input checked="" type="checkbox"/> <input type="checkbox"/>

An 'Add New' button is located at the bottom right of the table. A 'Continue' button is located at the top right of the main content area. A 'Question Tip' box at the bottom left provides instructions on how to update coverages.

The screenshot shows the 'Add insurance coverage' modal in the Autodesk Construction Cloud interface. The modal contains the following fields:

- Type\*: Automobile Liability
- Per occurrence limit\*: USD \$ 1,000,000.00
- Aggregate limit\*: USD \$ 1,000,000.00
- Carrier\*: 21st Century Auto Insurance Company of New Jersey
- Policy expiration\*: 12/30/2023
- Upload file: Choose Files

A 'Save' button is located at the bottom right of the modal. The background shows the 'Insurance' section of the Barton Malow Holdings profile.

2. Provide broker contact information.

The screenshot shows the 'Insurance' section of the Autodesk BuildingConnected interface for 'Barton Malow Holdings'. The left sidebar lists various sections: General, Contacts, Projects, Safety, Insurance (selected), Financial, and Review. The 'Insurance' section is highlighted with a '5/6' status. The main content area is titled 'Who is the broker or agency contact for your insurance programs?'. It contains the following fields:

- Broker/Agency company name: Insurance Broker
- Contact full name: This Is Myname
- Contact phone number: (555) 555-5555
- Contact email: annmotebakergiri@gmail.com

Buttons for 'Back' and 'Continue' are visible. A 'Print Summary' button is also present. A 'Question Tip' box at the bottom left states: 'Provide the primary brokerage point of contact for your insurance programs.'

3. Upload a copy of your complete insurance package. A complete insurance package includes a current insurance certificate and additional insured endorsement forms CG2010 and CG2037.

The screenshot shows the 'Insurance' section of the Autodesk BuildingConnected interface for 'Barton Malow Holdings'. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Provide us a copy of your current certificate(s) of insurance.' and includes a note: 'This application requires at least 1 entry for this question.' There is an 'Add New' button.

An 'Upload certificate' modal window is open, showing the following fields:

- Year\*: 2023
- Upload certificates\*: Choose Files

The modal also has a 'Save' button. Below the modal, the main content area shows a table with one entry for the year 2023, which has a checkbox and a document icon next to it.

4. Upload additional insured endorsements if not attached to complete insurance policy in Step 3. **\*If included in Step 3, upload a note stating endorsements are attached in step 3.**

The screenshot shows the Autodesk Construction Cloud interface for Barton Malow Holdings. The left sidebar contains a navigation menu with sections: General, Contacts, Projects, Safety, Insurance (highlighted with a 5/6 status), Financial, and Review. A 'Submit' button is located below the menu. A 'Question Tip' box is visible, stating: 'Additional insured forms must be compliant to our contract terms and conditions. We require forms: CG2010 10/01 combined with form CG2037 10/01. Please download our sample for details. Upload these forms with your certificate in the previous step.' The main content area displays the text 'Provide us your additional insured endorsement(s) to all applicable policies' and an 'Add New' button. A '2023' label is present near the bottom of the main area.

5. Provide waiver of subrogation for all policies. Required for General Liability, Auto & Workmen's Comp. **\*This may already be attached to your insurance policies. Upload a note stating waivers are attached in step 3.**

The screenshot shows the Autodesk Construction Cloud interface for Barton Malow Holdings. The left sidebar contains a navigation menu with sections: General, Contacts, Projects, Safety, Insurance (highlighted with a 5/6 status), Financial, and Review. A 'Print Summary' button is located above the menu. The main content area displays the text 'Please provide waivers of subrogation for all policies (if applicable) Upload with your certificate of insurance in step #3.' and a 'Choose Files' button. Below the button, it says 'Or select This doesn't apply to my company'. A 'Last saved: August 25, 2023 at 10:39 AM EDT' and 'Currency in: USD' are displayed at the top of the sidebar.

6. Answer six insurance questions.

The screenshot shows the 'Insurance' section of the BuildingConnected portal for Barton Malow Holdings. The left sidebar contains a navigation menu with 'Insurance' highlighted. The main content area displays six insurance questions with 'Yes' and 'No' response buttons. A 'Continue' button is in the top right corner. A 'Question Tip' box on the left provides instructions on how to provide additional information.

BuildingConnected  
Barton Malow Holdings  
Last saved: August 25, 2023 at 10:39 AM EDT  
Currency in: USD  
Print Summary  
Back

General  
Contacts  
Projects  
Safety  
**Insurance**  
Financial  
Review

Submit

? Question Tip  
If provided, hover your mouse over the help icon (i) after any question in the list for additional information. Please be sure to include an additional explanation or detail to your response when prompted.

Please answer the following question(s).

Click "Yes" to download a sample certificate and Additional Insured forms that meet our requirements [Insurance Documents](#) for your reference.

Do you own any company vehicles?

Does your company perform any abatement, demolition or hauling of construction spoils? If yes, you MUST include Pollution insurance on your certificate upload in Step #3.\* ⓘ

Does your company perform any type of design, engineering, surveying or consulting work? If yes, you MUST include Professional Liability insurance on your certificate upload in Step #3.\* ⓘ

Click "Yes" to acknowledge Barton Malow's minimum [Insurance Requirements](#), on pages 8 and 9, which will be included in our bid documents.\*

Is your company currently approved for a surety/bonding program? ⓘ

Continue

FINANCIAL SECTION

1. Upload current W9 that is signed and dated within this calendar year.

The screenshot shows the 'Financial' section of the BuildingConnected portal for Barton Malow Holdings. The left sidebar contains a navigation menu with 'Financial' highlighted. The main content area displays the instruction to provide the current IRS form W-9. A modal window titled 'Upload form W-9' is open, showing the 'Year signed' as 2023 and a file upload area with a 'Choose Files' button and a 'CDA Blank.doc' file. A 'Save' button is at the bottom right of the modal. A 'Continue' button is in the top right corner of the main content area. A 'Question Tip' box on the left provides instructions on how to provide the W-9 form.

BuildingConnected  
Barton Malow Holdings  
Last saved: August 25, 2023 at 10:41 AM EDT  
Currency in: USD  
Print Summary  
Back

General  
Contacts  
Projects  
Safety  
Insurance  
**Financial**  
Review

Submit

? Question Tip  
Provide your most recent IRS W-9 form that is signed and dated within this calendar year.

Provide your current IRS form W-9  
This application requires at least 1 entry for this question.

Continue

Upload form W-9

Year signed\*  
2023

Upload W-9\*  
Choose Files  
CDA Blank.doc

Save

Add New

## 2. Provide Annual Volume/Revenue.

The screenshot shows the 'Barton Malow Holdings' application form in the 'Financial' section. The left sidebar lists sections: General, Contacts, Projects, Safety, Insurance, Financial (selected), and Review. The main content area asks: 'What is your company's historical volume/revenue by year?' with a note: 'This application requires at least 1 entry for this question.' Below the question is a table with one row for '2023 (USD \$)' and an 'Add New' button. A 'Print Summary' button is in the top left, and a 'Continue' button is in the top right. A 'Question Tip' box at the bottom left explains that values should match the company's annual financial statements.

BuildingConnected - Barton Malow Holdings

Last saved: August 25, 2023 at 10:42 AM EDT  
Currency in: USD

Print Summary

General  
Contacts  
Projects  
Safety  
Insurance  
Financial  
Review

Submit

? Question Tip  
Provide your historical annual volume/revenue. If necessary, you may use estimates. These values should generally match what appears on the Statement of Income from your company's annual financial statements.

What is your company's historical volume/revenue by year?

This application requires at least 1 entry for this question.

Add New

2023 (USD \$)

Continue

## 3. Upload audited/reviewed financials from the previous year.

The screenshot shows the 'Barton Malow Holdings' application form in the 'Financial' section. The left sidebar lists sections: General, Contacts, Projects, Safety, Insurance, Financial (selected), and Review. The main content area asks: 'Upload your most recent financial statement including balance sheet and statement of income ("P&L"). CPA Audited or Reviewed statements are preferred.' Below the question is an 'Add New' button. A modal titled 'Add financial statement' is open, showing fields for 'Statement date\*' (8/3/2023), 'Statement type\*' (Compiled/Internal), and 'Upload statement (PDF)\*'. The modal has a 'Choose Files' button, a file list with 'Company-S-Order.pdf', and a 'Save' button. A 'Print Summary' button is in the top left, and a 'Continue' button is in the top right. A 'Question Tip' box at the bottom left explains that CPA Audited or Reviewed statements are preferred.

BuildingConnected - Barton Malow Holdings

Last saved: August 25, 2023 at 10:42 AM EDT  
Currency in: USD

Print Summary

General  
Contacts  
Projects  
Safety  
Insurance  
Financial  
Review

Submit

? Question Tip  
Your most recent annual CPA reviewed or audited statements are strongly preferred. If you provide a compiled or incomplete financial statement, your application may be rejected.

Upload your most recent financial statement including balance sheet and statement of income ("P&L"). CPA Audited or Reviewed statements are preferred.

Add New

Add financial statement

Statement date\*  
8/3/2023

Statement type\*  
Compiled/Internal

Upload statement (PDF)\*  
Choose Files

Company-S-Order.pdf

Save

Continue

#### 4. Answer one financial question.

The screenshot shows the BuildingConnected application interface for Barton Malow Holdings. The left sidebar contains a navigation menu with categories: General, Contacts, Projects, Safety, Insurance, Financial (highlighted), and Review. The main content area displays a question: "Do you wish to prequalify for a contract limit greater than \$300,000?\*" with "Yes" and "No" buttons. A "Continue" button is in the top right. A "Print Summary" button is in the top left. A "Back" button is above the question. A "Question Tip" box is at the bottom left.

Invitations  
Barton Malow Holdings

Last saved: August 25, 2023 at 10:43 AM EDT  
Currency in: USD

Print Summary

General  
Contacts  
Projects  
Safety  
Insurance  
Financial  
Review

Submit

? Question Tip  
If provided, hover your mouse over the help icon shown after any question in the list for additional information. Please be sure to include an additional explanation or detail to your response when prompted.

Please answer the following question(s).

Do you wish to prequalify for a contract limit greater than \$300,000?\*

Yes No

Continue

#### Review

Review the application prior to submission.

The screenshot shows the BuildingConnected application interface for Barton Malow Holdings, now in the Review stage. The left sidebar shows the "Review" category highlighted. The main content area displays a "Review responses before submitting" message. Below this, a table lists completed questions and their answers. A "Submit" button is in the top right. A "Print Summary" button is in the top left. A "Back" button is above the table.

Invitations  
Barton Malow Holdings

Last saved: August 25, 2023 at 10:43 AM EDT  
Currency in: USD

Print Summary

General  
Contacts  
Projects  
Safety  
Insurance  
Financial  
Review

Submit

Review responses before submitting

Please finalize any incomplete required questions as indicated below.  
**When complete, click Submit**  
All currency is in USD

Completed		
General	What is your company name? Test BMH #2	✓
	Select your currency. USD	✓
	Is your company a subsidiary or child to a parent company? Barton Malow Holdings	✓
	In what year and state/province was your company founded? Year Founded XXXX	✓

When the review is complete, verify all sections have green checks and click on SUBMIT.

**ALL GREEN CHECKS REQUIRED TO SUBMIT**

Review responses before submitting

Please finalize any incomplete required questions as indicated below  
**(When complete, click Submit)**  
All currency is in USD

General

What is your company name?  
Barton Malow

Based your currency, USD

Is your company a subsidiary or child to a parent company?

In what year and state/province was your company founded?  
Year Founded: 2018  
State/Province: Michigan

Provide us your company's business tax ID:  
00 FICM 22540229

The submission is successful when this message is visible.

Thanks! Your application has been successfully submitted

[Return to Invites](#)

If you have any questions or need assistance with a question, email the Risk Management team at [RMHelpDesk@Bartonmalow.com](mailto:RMHelpDesk@Bartonmalow.com).

If you encounter technical issues, click on the question mark at the upper right-hand corner to enter the BuildingConnected Help Desk.





## Step-by-Step Guide

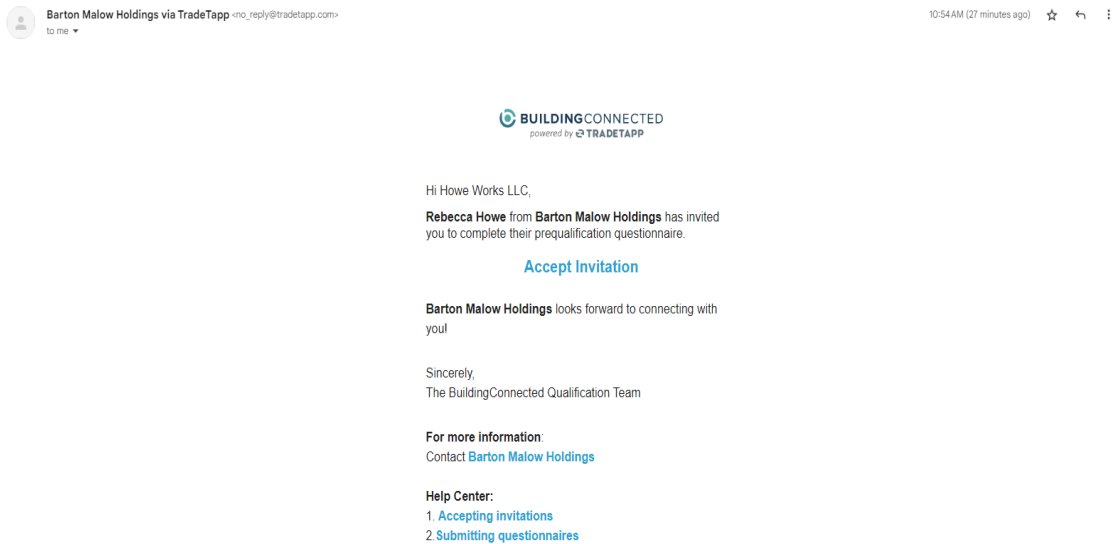
ONBOARDING QUESTIONNAIRE – MATERIAL ORDER  
UPDATED SEPTEMBER 2023

**Barton  
Malow**

## MATERIAL QUESTIONNAIRE

An invitation to complete an application will be sent to the contact you specify or is assigned as the default prequalification contact in BuildingConnected.

- Click on the blue box link in the center of the page.
- The invitation must be opened in Google Chrome.



## You will need an Autodesk ID to complete your application in BuildingConnected.

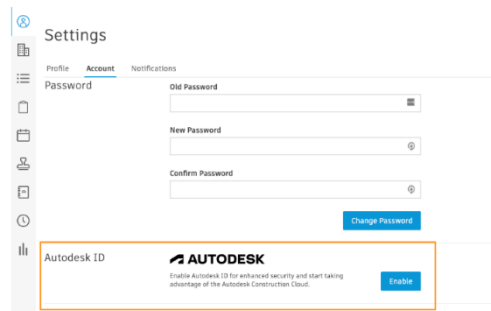
### If you do NOT have an AUTODESK ID:

- Create a [new account](#).
- Enter your email address and click "Create Account Using Autodesk ID."
- The system will verify your email address is not yet connected to an Autodesk ID. After verification, an account will be created immediately. Click "Continue to BuildingConnected".
- After creating a new account, you will need to verify your email address to access the "Qualifications" section. If you are linked to an existing company, you will also need to have your employment verified to access the "Qualifications" section. [Employment verification help.](#)

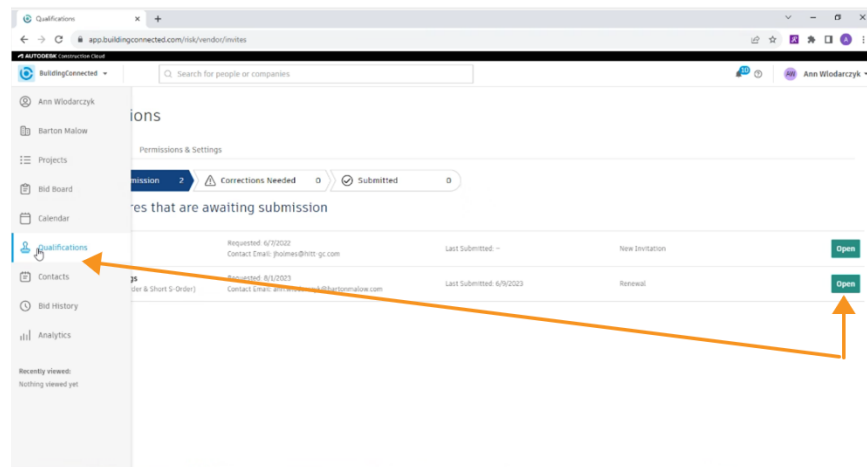
A screenshot of the BuildingConnected sign-up page. At the top is the 'BUILDINGCONNECTED' logo, with 'AN AUTODESK COMPANY' written below it. The main heading is 'Join BuildingConnected with Autodesk ID'. Below this is a text input field labeled 'Email'. Underneath the input field is a large blue button with a white 'A' icon and the text 'Create Account Using Autodesk ID'. At the bottom of the page, there is a small link that says 'Already have an account?'.

## If you do have an AUTODESK ID:

- Connect your Autodesk ID in the "Account" tab in Settings. Select "Enable" In the "Autodesk ID" section.



- After you have created your account, log into BuildingConnected and click "Qualifications" in the left navigation menu.



## Is this your first submission or annual renewal?

- If this is your first submission, you will need the documents listed under "REQUIRED DOCUMENTS" to complete the application.
- If this is an *annual renewal*, you only need to update *the safety, financial, and insurance portions of the application*. The balance of your information is saved in the system and only requires updating if something has changed.

## REQUIRED DOCUMENTS

**\*\*If there is a required document that is not applicable to your organization, or you are unable to provide; upload a note on letterhead explaining why the document is unavailable.**

- W9 Form - the company name must exactly match our contract and your BuildingConnected profile
- Current Insurance Certificates and additional insured forms CG2010 and CG2037

## Completing the Application

There are five (5) sections in the application.

The sections appear on the left-hand menu. (If you have previously applied, your previous data will be visible.)

### GENERAL SECTION

1. Begin by entering your company name. **(Important: You must type your company name exactly as it appears on your W9 form)** Click "Continue" in the upper-right corner of each page to move on to the next question. **All questions must be answered before you can submit. A green check mark must be present for each section before moving on to the next section.**

The screenshot shows the 'General' section of the application. On the left, a sidebar menu lists sections: General (0/1), Contacts (0/1), Safety (0/1), Insurance (3/5), Financial (9/11), and Review. The 'General' section is highlighted with an orange box. The main content area displays the question 'What is your company name?' with a text input field containing 'Test BMM #2'. A 'Continue' button is in the top right corner, indicated by an orange arrow. A 'Question Tip' box at the bottom left explains that the full legal name from the W9 form should be entered.

2. Select currency – USD or Canadian Dollars

The screenshot shows the 'Select your currency.' question. The sidebar menu is the same as in the previous screenshot. The main content area displays the question 'Select your currency.' with a dropdown menu showing 'USD'. A 'Continue' button is in the top right corner. A 'Question Tip' box at the bottom left explains that a single currency must be chosen for all financial data.

3. Is your company a subsidiary or child to a parent company? If this does not apply to your company, click on the link highlighted in blue.
- \*A second screen will open, and you will need to click again to indicate this does not apply to your company. You can move on after you see, "You have indicated not applicable to this question."**

The screenshot shows the Barton Malow Holdings profile page. The left sidebar contains a navigation menu with sections: General (0/1), Contacts (0/1), Safety (0/1), Insurance (3/5), Financial (9/11), and Review. The main content area displays the question: "Is your company a subsidiary or child to a parent company?". Below the question, a message states: "You have indicated not applicable to this question" followed by a blue link: "Click here if this does not apply to your company". A mouse cursor is hovering over the link. The top of the page shows the company name "Barton Malow Holdings" and a "Continue" button.

4. Identify the year and location of company foundation.

The screenshot shows the Barton Malow Holdings profile page. The left sidebar contains a navigation menu with sections: General (0/1), Contacts (0/1), Safety (0/1), Insurance (3/5), Financial (9/11), and Review. The main content area displays the question: "In what year and state/province was your company founded?". Below the question, there are two input fields: "Year Founded\*" with the value "2023" and "State/Province Founded\*" with the value "Michigan". A "Continue" button is visible in the top right corner.

5. Enter company business tax ID.

The screenshot shows the 'Barton Malow Holdings' profile page. On the left, there is a sidebar with navigation links: General (0/1), Contacts (0/1), Safety (0/1), Insurance (3/5), Financial (9/11), and Review. The 'General' tab is selected. The main content area displays the title 'Provide us your company's business tax ID.' followed by a warning message: 'This Tax ID is already being used by another company in the system. This can happen if your company is under the umbrella of another one and uses the same ID. If you have any questions, or your Tax ID should only be for your company, please click here to contact support and we will be happy to assist. You can still submit your questionnaire using this ID.' Below the warning, there are two input fields: 'Type' (a dropdown menu showing 'US FEIN') and 'Tax ID\*' (a text box containing '99999999'). A 'Continue' button is located at the top right of the main content area. At the bottom left, there is a 'Question Tip' box with text: 'If you do not have a US Federal Tax Identification Number, US Social Security Number, or Canadian Business Number, please select Other.'

6. Enter the corporate address that matches W9 as well as addresses for additional company offices.

The screenshot shows the 'Barton Malow Holdings' profile page with the 'Add New Office' modal open. The modal contains the following fields: 'Street Address\*' (text box), 'Floor, Suite, Bldg, etc. (optional)' (text box), 'City\*' (text box), 'State/Province\*' (dropdown menu), and 'Zip/Postal Code\*' (text box). There is also a checkbox labeled 'Set as main office'. The background page shows the same sidebar as in the previous screenshot, but the main content area is partially obscured by the modal. The 'Main Office' and 'Other Offices' sections are visible, both showing 'None Provided'.

7. Identify trade work that your company performs.

BuildingConnected

Invitations

Barton Malow Holdings

Last saved: August 17, 2023 at 10:29 AM EDT

Currency in: USD

Print Summary

General 0/1

Contacts 0/1

Safety 0/1

Insurance 3/5

Financial 9/11

Review

Submit

Question Tip

To add trades to your profile, use the drop-down menus to select CSI codes for work your company performs. If you have trouble finding a particular specification, simply add the general category code for that trade. Remember to add all that apply.

What type of work do you normally perform?

This application requires at least 1 entry for this question.

Your trades:

Add trades using the drop-down below:

Choose a division\*

00 00 00 Procurement and Contracting Requirements

01 00 00 General Requirements

02 00 00 Existing Conditions

03 00 00 Concrete

04 00 00 Masonry

Continue

BuildingConnected

Invitations

Barton Malow Holdings

Last saved: August 17, 2023 at 10:29 AM EDT

Currency in: USD

Print Summary

General 5/16

Contacts 0/1

Safety 0/1

Insurance 3/5

Financial 9/11

Review

Submit

Question Tip

To add trades to your profile, use the drop-down menus to select CSI codes for work your company performs. If you have trouble finding a particular specification, simply add the general category code for that trade. Remember to add all that apply.

What type of work do you normally perform?

This application requires at least 1 entry for this question.

Your trades:

Add trades using the drop-down below:

Choose a division\*

10 00 00 Specialties

Choose a specification (optional)

10 30 00 Fireplaces and Stoves

Click to add: 10 30 00 Fireplaces and Stoves

Continue

BuildingConnected

Invitations

Barton Malow Holdings

Last saved: August 17, 2023 at 10:29 AM EDT

Currency in: USD

Print Summary

General 5/16

Contacts 0/1

Safety 0/1

Insurance 3/5

Financial 9/11

Review

Submit

Question Tip

To add trades to your profile, use the drop-down menus to select CSI codes for work your company performs. If you have trouble finding a particular specification, simply add the general category code for that trade. Remember to add all that apply.

What type of work do you normally perform?

This application requires at least 1 entry for this question.

Your trades:

10 30 00 Fireplaces and Stoves

06 08 00 Commissioning of Wood, Plastics, and Composites

Choose a division\*

06 00 00 Wood, Plastics, and Composites

Choose a specification (optional)

06 08 00 Commissioning of Wood, Plastics, and Composites

Click to add: 06 08 00 Commissioning of Wood, Plastics, and Composites

Continue

8. What markets does your company serve?

The screenshot shows the BuildingConnected profile setup interface for Barton Malow Holdings. The left sidebar contains a navigation menu with 'General' (0/1), 'Contacts' (0/1), 'Safety' (0/1), 'Insurance' (3/5), 'Financial' (9/11), and 'Review'. The 'General' section is active, displaying a 'Print Summary' button and a 'Question Tip' box. The main content area asks 'What markets does your company normally serve?' and notes that at least one entry is required. Below this, a horizontal list of market categories is shown: 'Civil & Government', 'Commercial', 'Aviation', 'Concrete & Heavy Civil', 'Healthcare', 'Hospitality', 'Residential', and 'Retail'. Each category has a small 'x' icon next to it, indicating it can be selected or deselected.

9. Identify what region(s) your company serves.

The screenshot shows the BuildingConnected profile setup interface for Barton Malow Holdings, specifically the 'What regions does your company normally serve?' question. The left sidebar is identical to the previous screenshot, with 'General' (0/1) selected. The main content area asks 'What regions does your company normally serve?' and notes that at least one entry is required. Below this, a horizontal list of region categories is shown: 'Michigan' and 'Massachusetts'. Each category has a small 'x' icon next to it, indicating it can be selected or deselected.



10. Identify how many employees your company has.

The screenshot shows the AUTOSERVE BuildingConnected portal for Barton Malow Holdings. The left sidebar contains a navigation menu with 'General' (0/14), 'Contacts' (0/1), 'Safety' (0/1), 'Insurance' (3/5), 'Financial' (9/11), and 'Review'. The main content area displays the question 'How many employees does your company have?'. Below the question are two input fields: 'Number of Home Office Employees\*' with the value '1' and 'Number of Field Supervisory Employees\*' with the value '3'. A 'Continue' button is in the top right corner. A 'Question Tip' box at the bottom left states: 'Include only employees that are directly employed by your company. Do not include employees of subcontractors or suppliers.'

11. Identify if your company has any enterprise business certifications. If this does not apply to your company, click on the link highlighted in blue.

**\*A second screen will open, and you will need to click again to indicate this does not apply to your company. You can move on after you see, "You have indicated not applicable to this question."**

The first screenshot shows the question 'Does your company have any enterprise business certifications?'. Below the question is the text 'This application requires at least 1 entry for this question.' and two buttons: 'Add New' and 'Or select This doesn't apply to my company'. The second screenshot shows the same question, but with a message box that says 'You have indicated not applicable to this question. Click here if this does apply to your company'. The message box is highlighted with an orange border. The left sidebar and navigation menu are consistent with the first screenshot.

12. Identify company union affiliations. If this does not apply to your company, click on the link highlighted in blue.

**\*A second screen will open, and you will need to click again to indicate this does not apply to your company. You can move on after you see, "You have indicated not applicable to this question."**

The first screenshot shows the 'Barton Malow Holdings' profile page. The left sidebar contains a navigation menu with 'General' (00/14), 'Contacts' (0/1), 'Safety' (0/1), 'Insurance' (3/5), 'Financial' (9/11), and 'Review'. The main content area asks 'Does your company have any union affiliations?'. Below the question, there is a green 'Add New' button and a blue link 'This doesn't apply to my company'. A 'Continue' button is in the top right corner.

The second screenshot shows the same page after clicking the blue link. A yellow box highlights a message: 'You have indicated not applicable to this question. Click here if this does apply to your company.' The 'Continue' button is now highlighted in green.

13. Identify professional licenses. If this does not apply to your company, click on the link highlighted in blue.

**\*A second screen will open, and you will need to click again to indicate this does not apply to your company. You can move on after you see, "You have indicated not applicable to this question."**

The screenshot shows the 'Barton Malow Holdings' profile page. The left sidebar contains a navigation menu with 'General' (00/14), 'Contacts' (0/1), 'Safety' (0/1), 'Insurance' (3/5), 'Financial' (9/11), and 'Review'. The main content area asks 'Does your company have any professional licenses?'. Below the question, there is a green 'Add New' button and a blue link 'This doesn't apply to my company'. A 'Continue' button is in the top right corner.

**Barton Malow Holdings**

Last saved: August 17, 2023 at 10:35 AM EDT  
Currency in: USD

[Print Summary](#)

**General** 10/24

- Contacts 0/1
- Safety 0/1
- Insurance 3/5
- Financial 9/11
- Review

[Submit](#)

**? Question Tip**  
Please provide your company's professional licenses, such as your company's contractor license.

Does your company have any professional licenses?

You have indicated not applicable to this question  
Click here if this does apply to your company

[Continue](#)

14. Answer four questions.

**Barton Malow Holdings**

Last saved: August 17, 2023 at 10:35 AM EDT  
Currency in: USD

[Print Summary](#)

**General** 10/24

- Contacts 0/1
- Safety 0/1
- Insurance 3/5
- Financial 9/11
- Review

[Submit](#)

**? Question Tip**  
If provided, hover your mouse over the help icon shown after any question in the list for additional information. Please be sure to include an additional explanation or detail to your response when prompted.

Please answer the following question(s).

Did your Company name and/or FEIN change? IMPORTANT: If you change your company name or FEIN from what was previously shown, you MUST send an email to RMHelpDesk@BartonMalow.com. Please explain the reason for the change. This will affect our accounting system and will result in your company not being paid properly or timely? [?](#)

Does your firm have a preferred Remit To Address? If so please enter that in this section.\*

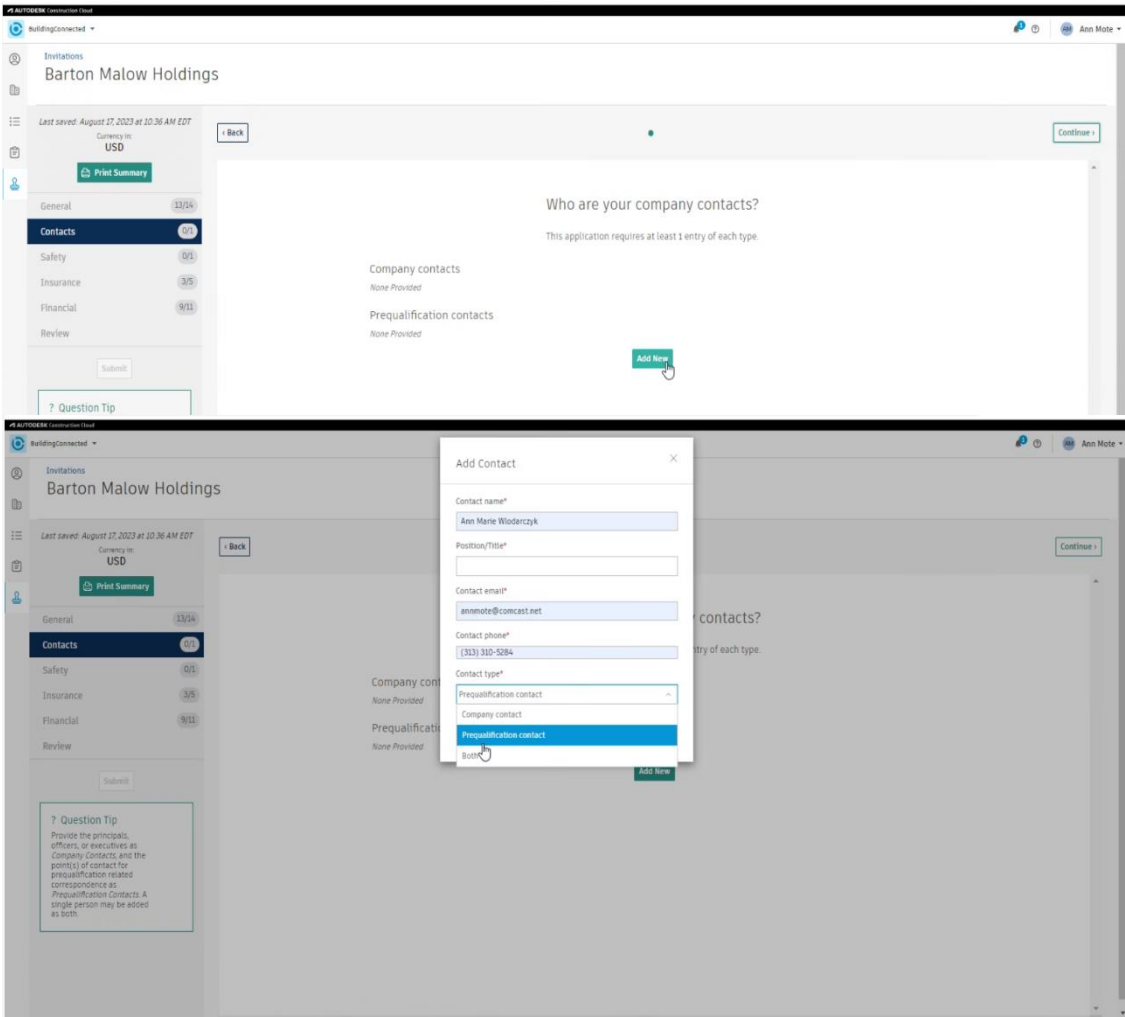
Click "Yes" to acknowledge Barton Malow's minimum Terms and Conditions, which will be included in our bid documents.\*

Click "Yes" to acknowledge Barton Malow's Business Associate Code of Conduct. Business Associate Code of Conduct?\*

[Continue](#)

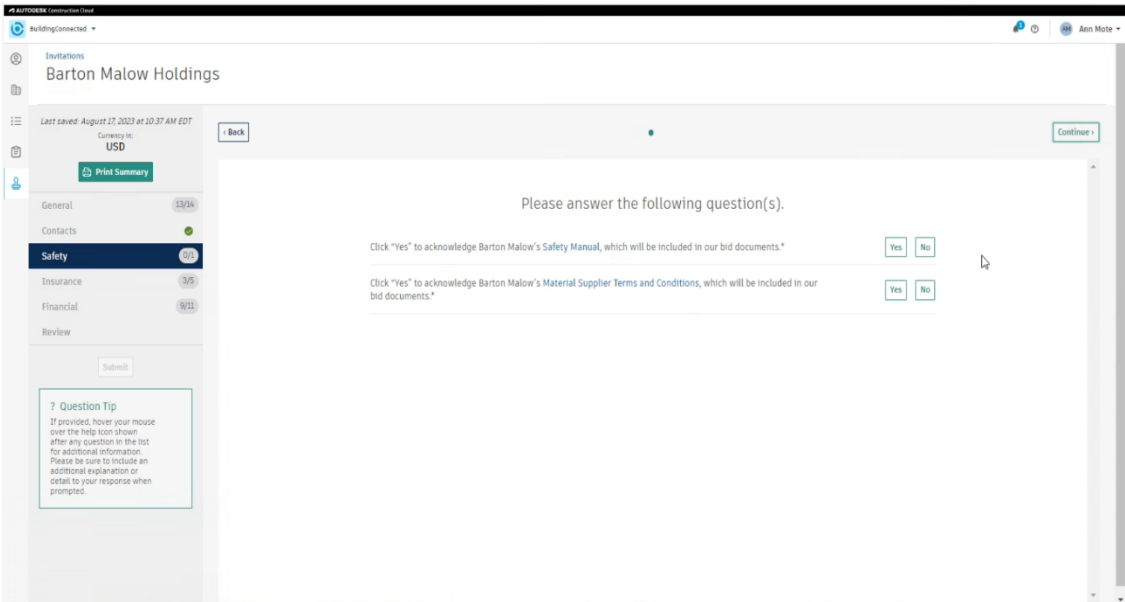
CONTACTS SECTION

- 1. Identify Company and Prequalification Contacts. **\*Prequalification contact will become the default contact for all communication during this application and future renewals.**



SAFETY SECTION

- 1. Answer two questions.



## INSURANCE SECTION

1. Enter details on current insurance policies. **\*\*PROVIDE POLICY LIMITS, CARRIER NAME AND POLICY EXPIRATION DATES IN THIS STEP. \*\*DO NOT UPLOAD COPIES OF INSURANCE POLICIES IN THIS STEP. YOU WILL UPLOAD THE INSURANCE PACKAGE IN STEP 3. If you have any questions regarding insurance, submit a ticket to [RMHelpDesk@bartonmalow.com](mailto:RMHelpDesk@bartonmalow.com).**

The screenshot displays the AUTODESK BuildingConnected web application. The main header shows 'Barton Malow Holdings' and 'Last saved: August 17, 2023 at 10:38 AM EDT'. The left sidebar contains a navigation menu with 'General', 'Contacts', 'Safety', 'Insurance', 'Financial', and 'Review'. The 'Insurance' section is highlighted with a green bar and a '3/5' indicator. The main content area asks 'What are the details of your current insurance policies?' and features an 'Add Note' button. A modal window titled 'Add insurance coverage' is open, containing the following fields: 'Type\*' (set to 'Automobile Liability'), 'Per occurrence limit\*' (USD \$ 1000000), 'Aggregate limit\*' (USD \$), 'Carrier\*' (empty), and 'Policy expiration\*' (a date selector). There is also an 'Upload file' section with a 'Choose Files' button. A 'Question Tip' box at the bottom left of the modal provides guidance on selecting the correct coverage type.

2. Provide broker contact information.

The screenshot shows the AUTODESK BuildingConnected web application with the 'Insurance' section selected in the sidebar. The main content area asks 'Who is the broker or agency contact for your insurance programs?'. Below this question is a form with five input fields: 'Broker/Agency company name', 'Contact full name', 'Contact phone number', 'Contact email', and an empty field for the address. A 'Question Tip' box at the bottom left of the form states: 'Provide the primary brokerage point of contact for your insurance programs.'

3. Upload a copy of your complete insurance package. A complete insurance package includes a current insurance certificate and additional insured endorsement forms CG2010 and CG2037.

BuildingConnected

Invitations

Barton Malow Holdings

Last saved: August 27, 2023 at 10:40 AM EDT

Currency in: USD

Print Summary

General 13/24

Contacts

Safety

Insurance 0/1

Financial 9/11

Review

Provide us a copy of your current certificate(s) of insurance.

This application requires at least 1 entry for this question.

Add New

Upload certificate

Year\*

2024

Upload certificate(s)\*

Choose Files

Save

Continue

? Question Tip

The certificate of insurance (or "COI" for this question) should be a sample that indicates ability to provide coverage.

4. Upload additional insured endorsements if not attached to complete insurance policy in Step 3. **\*If included in Step 3, upload a note stating endorsements are attached in step 3.**

BuildingConnected

Invitations

Barton Malow Holdings

Last saved: August 27, 2023 at 10:43 AM EDT

Currency in: USD

Print Summary

General 13/24

Contacts

Safety

Insurance 0/1

Financial 9/11

Review

Provide us your additional insured endorsement(s) to all applicable policies

Add New

Upload Endorsement(s)

Year\*

2024

Upload Endorsement(s)\*

Choose Files

Save

Continue

? Question Tip

Additional insured provisions from your insurance policies are used to verify coverage.

5. Provide waiver of subrogation for all policies. Required for General Liability, Auto & Workmen's Comp. **\*This may already be attached to your insurance policies. Upload a note stating waivers are attached in step 3.**

The screenshot shows the BuildingConnected portal for Barton Malow Holdings. The left sidebar contains a navigation menu with sections: General, Contacts, Projects, Safety, Insurance (highlighted), Financial, and Review. The main content area displays the 'Insurance' section with a progress indicator showing 100% completion. A message states: 'Please provide waivers of subrogation for all policies (if applicable)'. Below this message is a 'Choose Files' button and a file upload area showing 'Test.pdf'.

6. Answer six insurance questions.

The screenshot shows the BuildingConnected portal for Barton Malow Holdings, specifically the 'Insurance' section. The left sidebar shows the 'Insurance' section is 100% complete. The main content area displays the question: 'Please answer the following question(s)'. Below this are six questions, each with 'Yes' and 'No' response buttons:

- Click "Yes" to download a sample certificate and Additional Insured forms that meet our requirements Insurance Documents for your reference. ☐ Yes ☐ No
- Do you own any company vehicles? ☐ Yes ☐ No
- Does your company perform any abatement, demolition or hauling of construction spoils? If yes, please provide your Pollution Insurance certificate? ☐ Yes ☐ No
- Does your company perform any type of design, engineering, surveying or consulting work? If yes, please provide your Professional Liability Insurance certificate? ☐ Yes ☐ No
- Click "Yes" to acknowledge Barton Malow's minimum Insurance Requirements, on pages 8 and 9, which will be included in our bid documents.\* ☐ Yes ☐ No
- Is your company currently approved for a surety/bonding program? ☐ Yes ☐ No

FINANCIAL SECTION

- 1. Upload current W9.

BuildingConnected

Invitations

Barton Malow Holdings

Last saved: August 17, 2023 at 10:46 AM EDT

Currency in: USD

Print Summary

General 13/24

Contacts

Safety

Insurance

Financial 10/11

Review

Submit

Question Tip

Provide your most recent IRS W-9 form and specify the year the form was signed.

Back

Continue

Provide your current IRS form W-9

This application requires at least 1 entry for this question.

Add New

2023

- 2. Answer two financial questions.

BuildingConnected

Invitations

Barton Malow Holdings

Last saved: August 17, 2023 at 10:46 AM EDT

Currency in: USD

Print Summary

General 13/24

Contacts

Safety

Insurance

Financial 10/11

Review

Submit

Question Tip

If provided, hover your mouse over the help icon shown after any question in the list for additional information. Please be sure to include an additional explanation or detail to your response when prompted.

Back

Continue

Please answer the following question(s).

Do you wish to prequalify for a contract limit greater than \$300,000?\*

Yes No

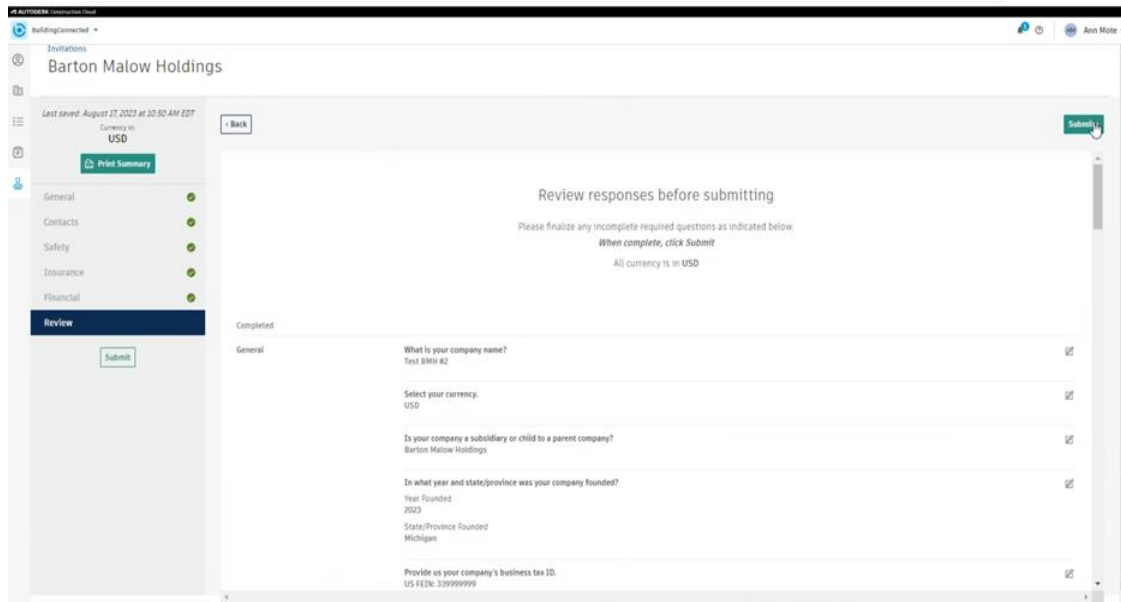
Do you wish to receive payment via ACH?

Yes No

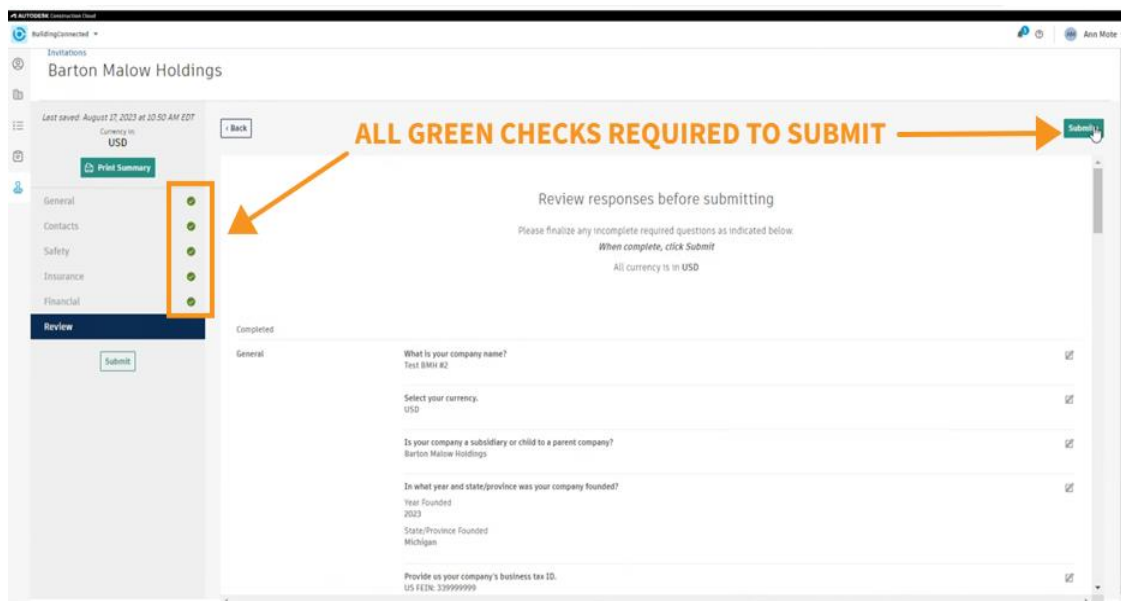


## Review

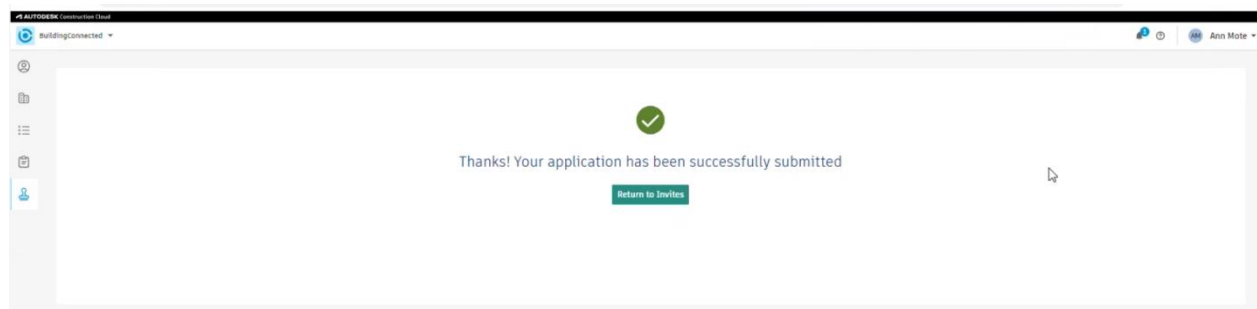
Review the application prior to submission.



When the review is complete, verify all sections have green checks and click on SUBMIT.



The submission is successful when this message is visible.



If you have any questions or need assistance with a question, email the Risk Management team at [RMHelpDesk@Bartonmalow.com](mailto:RMHelpDesk@Bartonmalow.com).

If you encounter technical issues, click on the question mark at the upper right-hand corner to enter the BuildingConnected Help Desk.



## Step-by-Step Guide

ONBOARDING QUESTIONNAIRE - GENERAL SERVICES

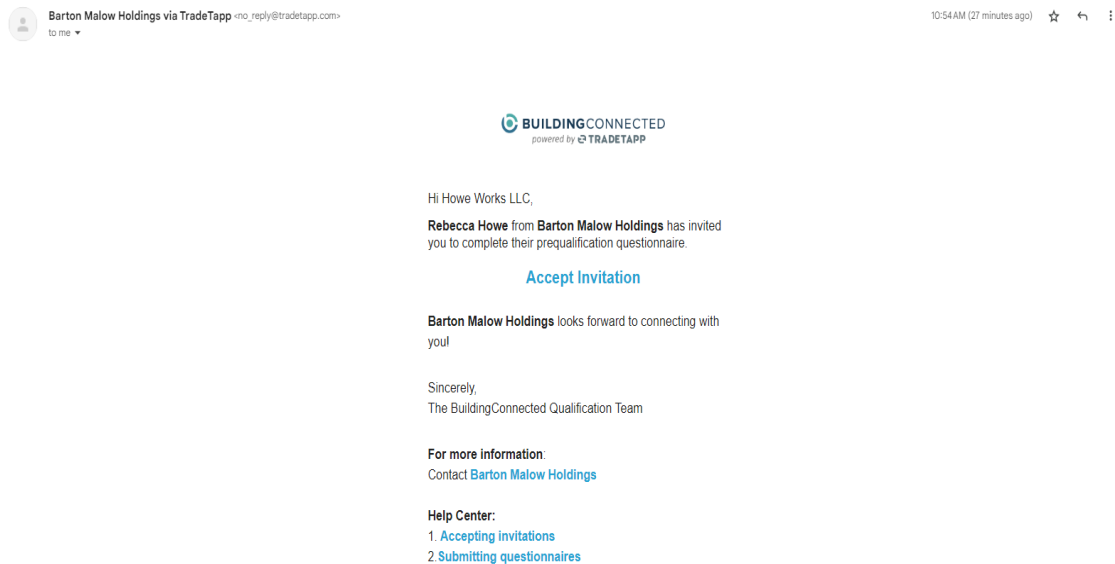
UPDATED SEPTEMBER 2023

**Barton  
Malow**

## GENERAL SERVICE QUESTIONNAIRE

An invitation to complete an application will be sent to the contact you specify or is assigned as the default prequalification contact in BuildingConnected.

- Click on the blue box link in the center of the page.
- The invitation must be opened in Google Chrome.



You will need an Autodesk ID to complete your application in BuildingConnected.

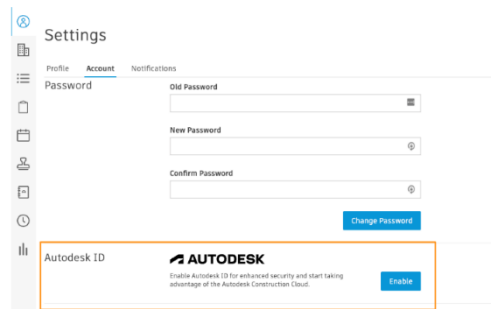
If you do NOT have an AUTODESK ID:

- Create a [new account](#).
- Enter your email address and click "Create Account Using Autodesk ID."
- The system will verify your email address is not yet connected to an Autodesk ID. After verification, an account will be created immediately. Click "Continue to BuildingConnected".
- After creating a new account, you will need to verify your email address to access the "Qualifications" section. If you are linked to an existing company, you will also need to have your employment verified to access the "Qualifications" section. [Employment verification help](#).

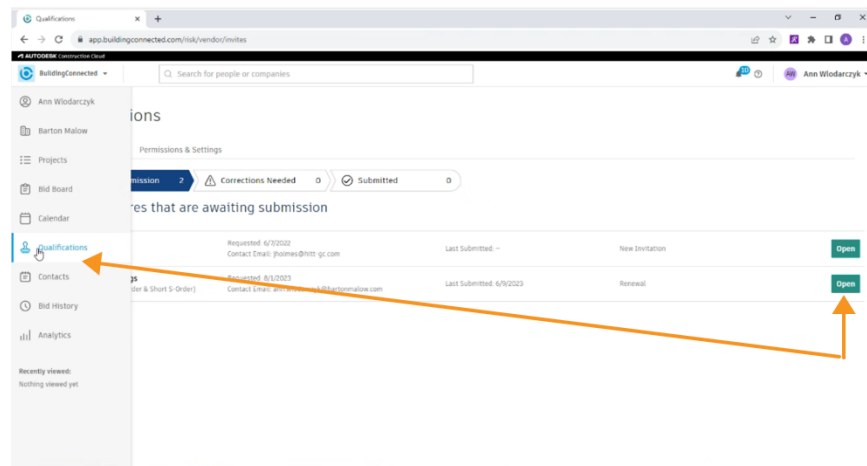
A screenshot of the BuildingConnected sign-up page. At the top is the BuildingConnected logo, labeled 'AN AUTODESK COMPANY'. The main heading is 'Join BuildingConnected with Autodesk ID'. Below this is a text input field labeled 'Email'. Underneath the input field is a large blue button with a white 'A' icon and the text 'Create Account Using Autodesk ID'. At the bottom of the form, there is a small link that says 'Already have an account?'.

## If you do have an AUTODESK ID:

- Connect your Autodesk ID in the “Account” tab in Settings. Select “Enable” In the “Autodesk ID” section.



- After you have created your account, log into BuildingConnected and click "Qualifications" in the left navigation menu.



## Is this your first submission or annual renewal?

- If this is your first submission, you will need the documents listed under “REQUIRED DOCUMENTS” to complete the application.
- If this is an *annual renewal*, you only need to update *the safety, financial, and insurance portions of the application*. The balance of your information is saved in the system and only requires updating if something has changed.

## REQUIRED DOCUMENTS

**\*\*If there is a required document that is *not* applicable to your organization, or you are unable to provide; upload a note on letterhead explaining why the document is unavailable.**

- W9 Form - the company name must exactly match our contract and your BuildingConnected profile
- Current Insurance Certificates and additional insured forms CG2010 and CG2037

## Completing the Application

There are five (5) sections in the application.

The sections appear on the left-hand menu. (If you have previously applied, your previous data will be visible.)

### GENERAL SECTION

1. Begin by entering your company name. **(Important: You must type your company name exactly as it appears on your W9 form)**  
Click "Continue" in the upper-right corner of each page to move on to the next question. **All questions must be answered before you can submit. A green check mark must be present for each section before moving on to the next section.**

The screenshot displays the BuildingConnected application interface. On the left, a sidebar menu lists sections: Invitations, General (13/14), Contacts, Safety (0/1), Insurance (4/5), Financial, and Review. The 'General' section is active. The main content area shows the question 'What is your company name?' with a text input field containing 'Test BMH #2'. A 'Continue' button is in the top right, and a 'Back' button is in the top left of the main area. A 'Print Summary' button is in the sidebar. A 'Question Tip' box at the bottom left states: 'Provide the full legal name of your company. If you are doing business under a different name than that listed on your W-9, enter as "Legal Name d/b/a Sample Name".'

2. Select currency – USD or Canadian Dollars

The screenshot shows the AUTODESK Construction Cloud interface for Barton Malow Holdings. The left sidebar contains a navigation menu with 'General' (13/14), 'Contacts', 'Safety' (0/1), 'Insurance' (4/5), 'Financial', and 'Review'. The main content area displays 'Select your currency.' with a note: 'Your selection will apply to all questions in this application including financial document uploads.' Below this is a dropdown menu for 'Currency\*' with 'USD' selected. A 'Continue' button is in the top right, and a 'Back' button is in the top left. A 'Print Summary' button is in the sidebar. A 'Question Tip' box at the bottom left states: 'Since all financial data must be provided in a single currency, please choose the currency of the financial statements you will be uploading with your submission.'

3. Is your company a subsidiary or child to a parent company? If this does not apply to your company, click on the link highlighted in blue.
- \*A second screen will open, and you will need to click again to indicate this does not apply to your company. You can move on after you see, "You have indicated not applicable to this question."**

The screenshot shows the AUTODESK Construction Cloud interface for Barton Malow Holdings. The left sidebar is identical to the previous screen. The main content area displays the question: 'Is your company a subsidiary or child to a parent company?'. Below the question is a text input field for 'Parent company name\*' with 'Barton Malow Holdings' entered. A 'Continue' button is in the top right, and a 'Back' button is in the top left. A 'Print Summary' button is in the sidebar. A 'Question Tip' box at the bottom left states: 'Provide the full legal name of your parent company.'

#### 4. Identify the year and location of company foundation

The screenshot shows the AUTODESK BuildingConnected portal for Barton Malow Holdings. The left sidebar contains a navigation menu with 'General' (13/14), 'Contacts', 'Safety' (0/1), 'Insurance' (4/5), 'Financial', and 'Review'. The 'General' tab is active, displaying a form titled 'In what year and state/province was your company founded?'. The form includes a 'Year Founded\*' field with the value '2023' and a 'State/Province Founded\*' dropdown menu with 'Michigan' selected. A 'Submit' button is at the bottom of the form. The top right corner shows a 'Continue' button and a user profile 'Ann Mote'.

#### 5. Enter company business tax ID.

The screenshot shows the AUTODESK BuildingConnected portal for Barton Malow Holdings. The left sidebar contains a navigation menu with 'General' (13/14), 'Contacts', 'Safety' (0/1), 'Insurance' (4/5), 'Financial', and 'Review'. The 'General' tab is active, displaying a form titled 'Provide us your company's business tax ID.'. The form includes a 'Type' dropdown menu with 'US FEIN' selected and a 'Tax ID\*' field with the value '339999999'. A 'Submit' button is at the bottom of the form. A 'Question Tip' box is visible in the bottom left corner, stating: 'If you do not have a US Federal Tax Identification Number, US Social Security Number, or Canadian Business Number, please select Other.' The top right corner shows a 'Continue' button and a user profile 'Ann Mote'.

6. Enter the corporate address that matches W9 as well as addresses for additional company offices.

The screenshot shows the AUTODESK BuildingConnected web application interface. The user is logged in as 'Ann Mote'. The page title is 'Barton Malow Holdings'. The left sidebar contains a navigation menu with 'General' (13/14), 'Contacts', 'Safety' (0/1), 'Insurance' (4/5), 'Financial', and 'Review'. The 'General' section is active, showing a 'Print Summary' button and a 'Submit' button. The main content area displays the question 'What is your company's address?' with a note: 'This application requires at least 1 entry for this question.' Below this, there are two sections: 'Main Office' and 'Other Offices'. The 'Main Office' section has a text input field containing '154 S Vernon St, Dearborn, Michigan, 48124' and a checked checkbox. The 'Other Offices' section has a text input field containing 'None Provided' and an 'Add New' button. A 'Continue' button is in the top right corner. A 'Question Tip' box at the bottom left explains that if a company has multiple locations, the address for each location should be provided, and the 'Main Office' checkbox should be checked for the main office address.

7. Identify trade work that your company performs.

The screenshot shows the AUTODESK BuildingConnected web application interface. The user is logged in as 'Ann Mote'. The page title is 'Barton Malow Holdings'. The left sidebar contains a navigation menu with 'General' (13/14), 'Contacts', 'Safety' (0/1), 'Insurance' (4/5), 'Financial', and 'Review'. The 'General' section is active, showing a 'Print Summary' button and a 'Submit' button. The main content area displays the question 'What type of work do you normally perform?' with a note: 'This application requires at least 1 entry for this question.' Below this, there is a section titled 'Your trades:' with a table listing three trades: '06 08 00 Commissioning of Wood, Plastics, and Composites', '10 30 00 Fireplaces and Stoves', and '02 06 00 Schedules for Existing Conditions'. Each trade has a checkbox that is currently unchecked. Below the table, there is a 'Choose a division' dropdown menu. A 'Continue' button is in the top right corner. A 'Question Tip' box at the bottom left explains that to add trades to the profile, the user should use the drop-down menus to select CSI codes for work the company performs, and if they have trouble finding a particular specification, they should simply add the general category code for that trade and remember to add all that apply.



8. What markets does your company serve?

The screenshot shows the Autodesk BuildingConnected profile setup interface for Barton Malow Holdings. The left sidebar contains a navigation menu with 'General' (13/14), 'Contacts', 'Safety' (0/1), 'Insurance' (4/5), 'Financial', and 'Review'. The 'General' section is active, showing a 'Print Summary' button and a 'Submit' button. A 'Question Tip' box explains that users should add markets served to their profile. The main content area displays the question 'What markets does your company normally serve?' with a note that at least one entry is required. Below the question is a horizontal list of market categories: 'Civic & Government', 'Aviation', 'Healthcare', 'Hospitality', 'Commercial', 'Retail', 'Concrete & Heavy Civil', and 'Residential'. A 'Continue' button is located in the top right corner of the main content area.

9. Identify what region(s) your company serves.

The screenshot shows the Autodesk BuildingConnected profile setup interface for Barton Malow Holdings, specifically the 'What regions does your company normally serve?' question. The left sidebar is identical to the previous screenshot, with 'General' (13/14) selected. The main content area displays the question 'What regions does your company normally serve?' with a note that at least one entry is required. Below the question is a horizontal list of region categories: 'Michigan' and 'Massachusetts'. A 'Continue' button is located in the top right corner of the main content area.

10. Identify how many employees your company has.

The screenshot shows the AUTODESK BuildingConnected portal for Barton Malow Holdings. The left sidebar contains a navigation menu with 'General' (13/14), 'Contacts', 'Safety' (0/1), 'Insurance' (4/5), 'Financial', and 'Review'. The main content area displays the question 'How many employees does your company have?'. Below the question are two input fields: 'Number of Home Office Employees\*' with the value '1' and 'Number of Field Supervisory Employees\*' with the value '3'. A 'Continue' button is in the top right corner. A 'Question Tip' box at the bottom left states: 'Include only employees that are directly employed by your company. Do not include employees of subcontractors or suppliers.'

11. Identify if your company has any enterprise business certifications. If this does not apply to your company, click on the link highlighted in blue.

**\*A second screen will open, and you will need to click again to indicate this does not apply to your company. You can move on after you see, "You have indicated not applicable to this question."**

The screenshot shows the AUTODESK BuildingConnected portal for Barton Malow Holdings. The left sidebar is identical to the previous screenshot. The main content area displays the question 'Does your company have any enterprise business certifications?'. Below the question, a message states: 'This application requires at least 1 entry for this question.' Below this message is a box containing the text: 'You have indicated not applicable to this question' and a blue link: 'Click here if this does apply to your company'. A 'Continue' button is in the top right corner. A 'Question Tip' box at the bottom left states: 'Provide your enterprise business status as granted by the US DOT and other qualifying agencies. You may provide one or several certifications.'

12. Identify company union affiliations. If this does not apply to your company, click on the link highlighted in blue.

**\*A second screen will open, and you will need to click again to indicate this does not apply to your company. You can move on after you see, "You have indicated not applicable to this question."**

The screenshot shows the BuildingConnected portal for Barton Malow Holdings. The left sidebar contains a navigation menu with 'General' (10/10), 'Contacts' (0/1), 'Safety' (0/1), 'Insurance' (3/3), 'Financial' (9/11), and 'Review'. The main content area displays the question: "Does your company have any union affiliations?". Below the question, a message states: "You have indicated not applicable to this question. Click here if this does apply to your company". A green "Continue" button is located in the top right corner of the question area. A "Print Summary" button is visible in the sidebar. A "Question Tip" box at the bottom left of the sidebar explains that multiple union affiliations can be provided.

13. Identify professional licenses. If this does not apply to your company, click on the link highlighted in blue.

**\*A second screen will open, and you will need to click again to indicate this does not apply to your company. You can move on after you see, "You have indicated not applicable to this question."**

The screenshot shows the BuildingConnected portal for Barton Malow Holdings, now on the 'Professional Licenses' question. The left sidebar shows progress: 'General' (13/14), 'Contacts' (checked), 'Safety' (0/1), 'Insurance' (4/5), 'Financial' (checked), and 'Review'. The main content area displays the question: "Does your company have any professional licenses?". Below the question, a message states: "You have indicated not applicable to this question. Click here if this does apply to your company". A green "Continue" button is highlighted in the top right corner. A "Print Summary" button is in the sidebar. A "Question Tip" box at the bottom left of the sidebar explains that professional licenses and contractor licenses should be provided.

14. Answer four questions.

The screenshot shows the Barton Malow Holdings application form. The left sidebar contains a navigation menu with 'General' selected. The main content area displays four questions with 'Yes' and 'No' buttons. An orange arrow points to the 'Continue' button in the top right corner.

Invitations  
Barton Malow Holdings

Last saved: August 25, 2023 at 10:48 AM EDT  
Currency in: USD

Print Summary

General

Contacts

Safety

Insurance

Financial

Review

Submit

Question Tip  
If provided, have your mouse over the help icon shown after any question in the list for additional information. Please be sure to include an additional explanation or detail to your response when prompted.

Please answer the following question(s).

Did your Company name and/or FEIN change? (IMPORTANT: If you change your company name or FEIN from what was previously shown, you MUST send an email to: [EMHregDesk@BartonMalow.com](mailto:EMHregDesk@BartonMalow.com). Please explain the reason for the change. This will affect our accounting system and will result in your company not being paid properly or timely.\* @)

Does your firm have a preferred Remit To Address? If so please enter that in this section.\*

Click "Yes" to acknowledge Barton Malow's minimum Terms and Conditions, which will be included in our S&B documents.\*

Click "Yes" to acknowledge Barton Malow's Business Associate Code of Conduct, Business Associate Code of Conduct?\*

Continue

## CONTACTS SECTION

1. Identify Company and Prequalification Contacts. **\*Prequalification contact will become the default contact for all communication during this application and future renewals.**

The screenshot shows the Barton Malow Holdings application form, specifically the Contacts section. The left sidebar contains a navigation menu with 'Contacts' selected. The main content area displays the 'Who are your company contacts?' section with a table for adding contacts. An orange arrow points to the 'Continue' button in the top right corner.

Invitations  
Barton Malow Holdings

Last saved: August 25, 2023 at 10:56 AM EDT  
Currency in: USD

Print Summary

General

Contacts

Safety

Insurance

Financial

Review

Submit

Question Tip  
Provide the principals, officers, or executives as Company Contacts, and the point(s) of contact for prequalification related correspondence as Prequalification Contacts. A single person may be added as both.

Who are your company contacts?

This application requires at least 1 entry of each type.

Company contacts	
Ann Note	<a href="#">Edit</a> <a href="#">Delete</a>

Prequalification contacts	
Ann Note	<a href="#">Edit</a> <a href="#">Delete</a>

Add New

Continue

## SAFETY SECTION

1. Answer two questions.

The screenshot shows the 'SAFETY' section of the Barton Malow Holdings profile. The left sidebar contains a navigation menu with 'General', 'Contacts', 'Safety' (selected), 'Insurance', 'Financial', and 'Review'. The main content area displays two questions with 'Yes' and 'No' response buttons. A 'Continue' button is in the top right corner. A 'Question Tip' box at the bottom left explains that hovering over a question icon provides additional information.

**Invitations**  
Barton Malow Holdings

Last saved: August 25, 2023 at 10:56 AM EDT  
Currency in: USD

[Print Summary](#)

General ☒  
Contacts ☒  
**Safety** ☒  
Insurance ☒  
Financial ☒  
Review ☐

[Submit](#)

**? Question Tip**  
If provided, hover your mouse over the help icon shown after any question in the list for additional information. Please be sure to include an additional explanation or detail to your response when prompted.

Please answer the following question(s).

Click "Yes" to acknowledge Barton Malow's [Safety Manual](#), which will be included in our bid documents.\* ☒ Yes ☐ No

Click "Yes" to acknowledge Barton Malow's [General Services Terms and Conditions](#), which will be included in our bid documents.\* ☒ Yes ☐ No

[Continue](#)

## INSURANCE SECTION

1. Enter details on current insurance policies. **\*\*PROVIDE POLICY LIMITS, CARRIER NAME AND POLICY EXPIRATION DATES IN THIS STEP. \*\*DO NOT UPLOAD COPIES OF INSURANCE POLICIES IN THIS STEP. YOU WILL UPLOAD THE INSURANCE PACKAGE IN STEP 3. If you have any questions regarding insurance, submit a ticket to [RMHelpDesk@bartonmalow.com](mailto:RMHelpDesk@bartonmalow.com).**

The screenshot shows the 'INSURANCE' section of the Barton Malow Holdings profile. The left sidebar contains a navigation menu with 'General', 'Contacts', 'Safety', 'Insurance' (selected), 'Financial', and 'Review'. The main content area displays a table for entering insurance policy details. An 'Add New' button is at the bottom. A 'Continue' button is in the top right corner. A 'Question Tip' box at the bottom left explains that all coverages, limits, carrier, and expiration dates must be entered, and that document upload occurs in Step #3.

**Invitations**  
Barton Malow Holdings

Last saved: August 25, 2023 at 11:01 AM EDT  
Currency in: USD

[Print Summary](#)

General ☒  
Contacts ☒  
Safety ☒  
**Insurance** ☒  
Financial ☒  
Review ☐

[Submit](#)

**? Question Tip**  
Update all coverages for limits, carrier, and expiration date. General Liability, Auto, Work Comp, and Umbrella must all be entered. Do NOT upload any documents in this step. Document upload is in Step #3.

What are the details of your current insurance policies?

Automobile Liability	<input checked="" type="checkbox"/>	<input type="checkbox"/>
General Liability	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Umbrella/Excess	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Workers' Compensation	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Professional Liability	<input checked="" type="checkbox"/>	<input type="checkbox"/>

[Add New](#)

[Continue](#)

2. Provide broker contact information.

The screenshot shows the AUTOSERVE Contractor Cloud interface for Barton Malow Holdings. The left sidebar contains a navigation menu with sections: General, Contacts, Safety, Insurance (selected), Financial, and Review. The main content area is titled 'Who is the broker or agency contact for your insurance programs?'. It contains a form with the following fields: Broker/Agency company name (Insurance Broker), Contact full name (This Is MyName), Contact phone number ((555) 555-5555), and Contact email (annmotebakergirl@gmail.com). A 'Continue' button is in the top right corner. A 'Question Tip' box at the bottom left states: 'Provide the primary brokerage point of contact for your insurance programs.'

3. Upload a copy of your complete insurance package. A complete insurance package includes a current insurance certificate and additional insured endorsement forms CG2010 and CG2037.

The screenshot shows the AUTOSERVE Contractor Cloud interface for Barton Malow Holdings. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Provide us a copy of your current certificate(s) of insurance.' and includes a note: 'This application requires at least 1 entry for this question.' Below this is an 'Add New' button and a table with one row for the year '2023'. A 'Continue' button is in the top right corner. A 'Question Tip' box at the bottom left states: 'Upload one combined pdf document packet that includes your Certificate of Insurance, Additional Insured forms, Primary & Non-Contributory forms, Waivers of Subrogation, and 30 day notice of cancellation forms.'

4. Upload additional insured endorsements if not attached to complete insurance policy in Step 3. **\*If included in Step 3, upload a note stating endorsements are attached in step 3.**

BuildingConnected

Invitations

Barton Malow Holdings

Last saved: August 23, 2023 at 11:01 AM EDT

Currency in: USD

Print Summary

General

Contacts

Safety

Insurance

Financial

Review

Submit

? Question Tip

Additional insured forms must be compliant to our contract terms and conditions. We require forms C0200 10/01 combined with form C0203 10/01. Please download our sample for details. Upload these forms with your certificate in the previous step.

Provide us your additional insured endorsement(s) to all applicable policies

Add New

2023

Continue

5. Provide waiver of subrogation for all policies. Required for General Liability, Auto & Workmen's Comp. **\*This may already be attached to your insurance policies. Upload a note stating waivers are attached in step 3.**

Barton Malow Holdings

app.buildingconnected.com/risk/vendor/form/206791/custom1287

BuildingConnected

Search for people or companies

Invitations

Barton Malow Holdings

Last saved: August 1, 2023 at 2:48 PM EDT

Currency in: USD

Print Summary

General

Contacts

Projects

Safety

Insurance

Financial

Review

Submit

Please provide waivers of subrogation for all policies (if applicable)

Choose Files

Test.pdf

Continue

## 6. Answer six insurance questions.

The screenshot shows the 'Insurance' section of the BuildingConnected portal for Barton Malow Holdings. The left sidebar contains a navigation menu with 'General', 'Contacts', 'Safety', 'Insurance' (highlighted with a 4/5 status), 'Financial', and 'Review'. The main content area is titled 'Please answer the following question(s)'. It contains six questions, each with 'Yes' and 'No' buttons. A 'Continue' button is in the top right, and a 'Back' button is in the top left. A 'Print Summary' button is in the sidebar. A 'Question Tip' box is at the bottom left.

BuildingConnected

Invitations

Barton Malow Holdings

Last saved: August 25, 2023 at 11:01 AM EDT

Currency in: USD

Print Summary

General

Contacts

Safety

Insurance 4/5

Financial

Review

Submit

? Question Tip

If provided, hover your mouse over the help icon shown after any question in the list for additional information. Please be sure to include an additional explanation or detail to your response when prompted.

Please answer the following question(s).

Click "Yes" to download a sample certificate and Additional Insured forms that meet our requirements [Insurance Documents](#) for your reference.

Do you own any company vehicles?\*

Does your company perform any abatement, demolition or hauling of construction spoils? If yes, you MUST include Pollution Insurance on your certificate upload in Step #3.\* ⓘ

Does your company perform any type of design, engineering, surveying or consulting work? If yes, you MUST include Professional Liability Insurance on your certificate upload in Step #3.\* ⓘ

Is your company currently approved for a surety/bonding program? ⓘ

Click "Yes" to acknowledge Barton Malow's minimum [Insurance Requirements](#), on pages 8 and 9, which will be included in our bid documents.\*

Continue

Back

Yes No

Yes No

Yes No

Yes No

Yes No

Yes No

## FINANCIAL SECTION

### 1. Upload current W9.

The screenshot shows the 'Financial' section of the BuildingConnected portal for Barton Malow Holdings. The left sidebar contains a navigation menu with 'General', 'Contacts', 'Safety', 'Insurance', 'Financial' (highlighted with a checkmark), and 'Review'. The main content area is titled 'Provide your current IRS form W-9'. It contains a table with one row for the year '2023' and an 'Add New' button. A 'Continue' button is in the top right, and a 'Back' button is in the top left. A 'Print Summary' button is in the sidebar. A 'Question Tip' box is at the bottom left.

BuildingConnected

Invitations

Barton Malow Holdings

Last saved: August 25, 2023 at 11:04 AM EDT

Currency in: USD

Print Summary

General

Contacts

Safety

Insurance

Financial

Review

Submit

? Question Tip

Provide your most recent IRS W-9 form that is signed and dated within this calendar year.

Provide your current IRS form W-9

This application requires at least 1 entry for this question.

Add New

2023

Continue

Back



## 2. Answer one financial question.

The screenshot shows the Autodesk BuildingConnected portal for Barton Malow Holdings. The left sidebar contains a navigation menu with sections: General, Contacts, Safety, Insurance, Financial (selected), and Review. The main content area displays a questionnaire titled "Please answer the following question(s)." with the question: "Do you wish to prequalify for a contract limit greater than \$300,000?\*" with "Yes" and "No" buttons. A "Continue" button is in the top right corner. A "Question Tip" box is visible in the bottom left.

Autodesk BuildingConnected Cloud

BuildingConnected

Invitations

Barton Malow Holdings

Last saved: August 25, 2023 at 11:04 AM EDT

Currency in: USD

Print Summary

General

Contacts

Safety

Insurance

Financial

Review

Submit

? Question Tip

If provided, hover your mouse over the help icon shown after any question in the list for additional information. Please be sure to include an additional explanation or detail to your response when prompted.

Please answer the following question(s).

Do you wish to prequalify for a contract limit greater than \$300,000?\*

Yes No

Continue

## Review

Review the application prior to submission.

The screenshot shows the Autodesk BuildingConnected portal for Barton Malow Holdings, now in the "Review" section. The left sidebar shows the "Review" section selected. The main content area displays a summary of the completed questions and answers. A "Submit" button is in the top right corner.

Autodesk BuildingConnected Cloud

BuildingConnected

Invitations

Barton Malow Holdings

Last saved: August 25, 2023 at 11:04 AM EDT

Currency in: USD

Print Summary

General

Contacts

Safety

Insurance

Financial

Review

Submit

Review responses before submitting

Please finalize any incomplete required questions as indicated below.

When complete, click Submit

All currency is in USD

Completed

General

What is your company name?

Test BMH #2

Select your currency.

USD

Is your company a subsidiary or child to a parent company?

Barton Malow Holdings

In what year and state/province was your company founded?

Year Founded

2000

Submit

When the review is complete, verify all sections have green checks and click on SUBMIT.

ALL GREEN CHECKS REQUIRED TO SUBMIT

Review responses before submitting

Please finalize any incomplete required questions as indicated below.  
When complete, click Submit  
All currency is in USD

Completed
General
What is your company name? Test BMH #2
Select your currency. USD
Is your company a subsidiary or child to a parent company? Barton Malow Holdings
In what year and state/province was your company founded? Year founded 2023 State/Province founded Michigan
Provide us your company's business tax ID. US FEIN: 339999999

The submission is successful when this message is visible.

Thanks! Your application has been successfully submitted

Return to Invites

If you have any questions or need assistance with a question, email the Risk Management team at [RMHelpDesk@Bartonmalow.com](mailto:RMHelpDesk@Bartonmalow.com).

If you encounter technical issues, click on the question mark at the upper right-hand corner to enter the BuildingConnected Help Desk.