**Directions:** Refer to page 2 of the T&M Proposal Form for detailed instructions on completing this form.

**CONTRACTOR (Complete Sections I - IV Below):**

**Section I: T&M Identification and Contact Information**

|  |  |
| --- | --- |
| **AUTHORIZED USER NAME, CONTACT PERSON, PHONE:**      | **MINI-BID NUMBER:**        |
| **T&M NUMBER:**       |
| **CONTRACTOR NAME, CONTACT PERSON, PHONE:**      | **T&M TYPE (check one below)** |

 **Section II: T&M Justification:** (**CONTRACTOR** to provide a detailed justification that explains the need for the repair/scope of work.)

|  |  |
| --- | --- |
| **Building #:**      **Equipment ID #:**       | **Equipment Description:**       |
| **Describe Problem or Deficiency:**      |
| **Describe Troubleshooting Performed:**      |

**Section III: T&M Scope of Work:** (**CONTRACTOR** to provide a detailed description of the proposed scope of work.)

|  |
| --- |
|       |

**Section IV: T&M Not-to-Exceed Quote:**

1. **Labor**

|  |  |  |  |
| --- | --- | --- | --- |
| **Description** **(indicate technician classification Contract)** | **Estimated Labor Hours** | **Contracted Hourly Labor Rate** | **Total Labor Quote** |
|       Elevator Mechanic Straight Time |       |  |       |
|       Elevator Apprentice Straight Time |       |  |       |
|       Elevator Mechanic Overtime |       |  |       |
|       Elevator Apprentice Overtime |       |  |       |
| **Total Labor Quote:** |       |

1. **Material, Equipment and Subcontractor Costs**

**(Please list material or components. Subcontractor costs must include a detailed breakdown of labor hours, labor rate, and material costs. Attach a separate itemized list, if necessary.)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Description of Major Components**  | **Quantity** | **Total Estimated Cost**  | **Material Markup (%)** | **Less Discounts Allowed** | **Total Material Quote** |
|       |       |       |      % |       |       |
|       |       |       |      % |       |       |
|       |       |       |      % |       |       |
| Subcontractor costs |       |       |      % |       |       |
| Freight / Shipping and Handling | N/A |       | N/A |       |       |
| **Total Material, Equipment and Subcontractor Quote:** |       |

**Total T&M Not-to-Exceed Quote for Scope of Work (A+B):**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |
| --- | --- |
| **Section V: AUTHORIZED USER HEALTH & SAFETY JUSTIFICATION (AU Use Only):****The scope of work detailed below included in this proposal is necessary for the direct health and/or safety of the clients (if applicable), employees, and/or visitors.** |       **Initials Required****(AU Designee)** |

Authorized User Designee:       Contractor Representative:

Title:       Title:

Date:       Date:

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Directions for Completing the T&M Proposal Form**

The **CONTRACTOR** shall complete Sections I through IV on page 1. In Section I, the **CONTRACTOR** shall provide a T&M identification number and indicate if this proposal is for an Emergency T&M response. **Authorized User (AU)** will not consider approval of this T&M if any sections or fields are omitted by the **CONTRACTOR**. The **CONTRACTOR** shall sign the proposal at the time it is submitted to the **AU** for approval; the **AU designee** shall sign the proposal. Please expand any sections and/or use additional pages as necessary to provide the required detailed T&M repair information. The AU reserves the right to alter the T&M Proposal Form as necessary.

**Summary of T&M Protocol**

**Step 1:** When a need is identified by the Contractor or the AU, the **Contractor** shall note any repairs necessary and provide a T&M Proposal within two (2) business days via fax/email to the **AU** for repairs, replacements, or upgrades. Once the T&M proposal is received from the Contractor, the **AU** determines if the work can be performed by internal staff. If the work cannot be performed internally, the **AU** shall process the T&M “Not-to-Exceed” proposal developed by the **Contractor**, following the subsequent steps outlined below.

**Step 2:** The **AU** reviews the T&M Proposal to ensure that it meets the terms/rates under the AU Mini-bid Agreement. The **AU** must also review and ensure that the proposal meets the following three (3) criteria for approval: 1) The AU staff is unable to perform the required repair and the Contractor’s services are therefore needed; 2) The scope of work is acceptable; and 3) The price quote is reasonable.

**Step 3: AU Designee** shall initial the Authorized User Health & Safety Justification Statement in Section V indicating the need for the repair and forwards the completed, Contractor-signed (electronic signature is acceptable) T&M Proposal Form and any related documentation via e-mail to mailto: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**Step 4: AU** shall consult with any necessary personnel or consultants as needed to review and evaluate the T&M Proposal Form. If additional information is needed to complete the T&M review process, the **AU** will e-mail the **Contractor**. .

**Step 5:** If approved, the **AU designee** signs the T&M Proposal form and notifies the **Contractor** to proceed and provides the signed T&M Proposal.

**Step 6: Contractor** performs T&M work.

**Step 7: AU** ensures that the work has been performed to its satisfaction and make any additional notification as necessary (e.g., AU Finance Office).

**Step 8:** **Contractor** submits an invoice, with a copy of the AU-approved T&M Proposal Form, repair service tickets, material cost supporting documentation/receipts, and invoices from subcontractors (if utilized), to the email address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**Step 9: AU** reviews the invoice to ensure that: 1) the actual hours worked and documented in the invoice and service ticket(s) is accurate as compared to the labor hours logged by the Contractor in the AU sign-in/out log book; 2) the materials billed match the costs indicated in the material cost supporting documentation; and 3) the Contractor billed at the correct labor rate(s) and applied the correct material markup as stated in Mini-bid Agreement. If the invoice is acceptable, **AU** shall authorize payment in accordance with its internal procedures (e.g., FileNet / SFS).

**Emergency T&M Post-Audit Review and Approval Process:**

This process follows the T&M Protocol with the following deviations:

* The **AU** will immediately call in the **Contractor** to perform the repair rather than waiting for pre-approval.
* After the Emergency T&M repair is complete, the **Contractor** shall then submit the related invoice to AU e-mail at: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ with a completed T&M Proposal Form and a copy of all applicable service ticket(s) and material cost supporting documentation. The Section V: T&M Not-to-Exceed Quote section of the T&M Proposal Form shall reflect the actual costs associated with the Emergency T&M repair as detailed in the invoice submitted.
* The **AU designee** forwards the completed, Contractor and AU-signed T&M Proposal Form, the applicable service ticket(s) and material cost supporting documentation, and a copy of the AU sign-in/out log book for the applicable date(s) of service via e-mail to mailto: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ in accordance with its internal procedures.