

ECMS

Pennsylvania Department
of Transportation

Bureau of Design
400 North Street, 7th Floor
Harrisburg, PA 17120-0094

How to Register as a Consultant Business Partner with PennDOT

Web Site:
<http://www.dot2.state.pa.us>

Registering as a Consultant Business Partner is a 4-Step Process

Step 1 – Become an Approved Business Partner

1. Access the PennDOT ECMS web site, www.dot2.state.pa.us, and click on the ECMS Public Site link. Click on the Business Partner title in the navigation bar on the left, then click on Registration. Download the Business Partner Registration form, print it, complete it and send it to the address indicated on the web site. (Hint: While on the first page of the web site, save it as a Favorite.)
2. On that same web page, press the Register button, fill out the requested information contained in all 5 Tabs on the screen and electronically submit this form to PennDOT.
3. Your designated System Administrator (Tab 4 of the registration information form) will receive an email notification assigning your firm a Business Partner ID number, a Systems Administrator User ID and password. This email should be received no more than 2 weeks after the Department has received the registration form.
4. Your system administrator must log in using this new User Id and Password, change his/her password and create your firm's user ids for your principal(s), financial officer, project managers and data entry personnel. These user classifications have the following privileges.

Users	ECMS Capabilities
Principals	<ul style="list-style-type: none"> ◆ Create and submit Annual Consultant Qualifications Packages ◆ Create, update and submit Overhead Rate information ◆ Create, update and submit Employee Roster ◆ Create and submit Technical and Price Proposals ◆ Download, create and submit Invoices
Financial Officer	<ul style="list-style-type: none"> ◆ Create, update and submit Overhead Rate information ◆ Create, update and submit Employee Rosters ◆ Create and submit Technical and Price Proposals ◆ Download, create and submit Invoices
Project Managers	<ul style="list-style-type: none"> ◆ View Employee Rosters ◆ Create and submit Technical and Price Proposals ◆ Create and submit Invoices
Data Entry	<ul style="list-style-type: none"> ◆ View business partner information ◆ Process off-line forms for Invoicing and Consultant Qualification package

ECMS

Each ECMS application has on-line Help text that will guide you through how to complete the required tasks. Just click on the HELP link on the ECMS Home page to view the Help text that is available.

Step 2 – Submit Annual Consultant Qualifications Package

1. You cannot submit your Annual Consultant Qualifications Package until you have received your Business Partner ID number from Step 1. You may, however, prepare your Annual Consultant Qualifications Package while the Department is processing your Business Partner registration form. Select the Consultant Services option on the navigation bar. Under that option, select the Consultant Qualifications option and download and complete the off-line Consultant Qualifications Package (CQP) templates. Resumes should not exceed two pages per individual. All templates shall be completed using 12 pitch or larger type.
2. After you have completed the off-line templates, have received your Business Partner ID Number and have set-up user ID's for your principal(s) or financial officer(s), these users can submit your Annual Consultant Qualifications Package. They need to log into ECMS as a registered user and select the Consultant Qualifications option on the navigation bar. Click on the Create Consultant Qualifications Package button to electronically submit the templates to PennDOT with the electronic CQP cover sheet. Your Annual Consultant Qualifications package does not require Department approval.

Step 3 – Submit Firm Overhead Information for review and approval

1. Your financial officer or principal must log in as a registered user, select the Overhead Information option on the navigation bar and complete and submit the electronic Overhead Information for review and approval by PennDOT. You normally must submit a hard copy of your Audit Report to:

PA Department of Transportation
Consultant Agreement Division
Bureau of Design
P.O. Box 3060
Harrisburg, PA 17105-3060

If the Overhead Rates being entered on the Overhead Information form were previously approved by the Department, you should not submit a copy of your Audit Report, but you should indicate "Previously Approved" in the comments box on the Overhead Information form.

2. You will receive an email confirming your approved overhead rates once the Overhead Information form (and the Audit Report, if required) is received and reviewed.

ECMS

Step 4 – Complete and submit Employee Roster and wage rate information for PennDOT review and approval

1. Your principal(s) or financial officer(s) must log in as a registered user and select the Consultant Services option on the navigation bar. Select Roster Maintenance option and create your roster of employees with all the appropriate classifications and wage rates for each employee. Note that every employee wage rate is created in pending status and automatically submitted to PennDOT for review and approval.
2. You will be able to see if the employee wage rate has been approved or rejected by checking the status on line. There are no email notifications for employee rate approvals or rejections.

Email notification is provided for:

- ◆ *Business Partner Registration Approval* – Includes your Business Partner ID, which uniquely identifies your firm to ECMS; the Administrator ID and Password, which allow a designated administrator to create user IDs and passwords for Business Partner user groups; and detailed instructions to guide the Business Partner Administrator through initial logon and change password transactions.
- ◆ *Overhead Information Approval*
- ◆ *Consultant Qualifications Expiration* – An email reminder is generated and sent to the Business Partner about one month before the current Consultant Qualifications Package expires.

How do I find out about Planned and/or Advertised Projects?

PennDOT will publish planned projects on the ECMS Web page in advance of actually advertising the request for Statements of Interest. This will give you an opportunity to review and plan for your Statements of Interest.

Planned Projects

1. To look at Planned Projects, access the ECMS Home Page and select Registered User Log on. Sign on with your ECMS User ID and Password (you can also view Planned Projects as a public user, but if you are a registered business partner, you might as well sign on and have more flexibility).
2. ECMS will display the Welcome to ECMS Home page. On the Navigation pane to the left of the Home Page, click on Consultant Services. Your ECMS options will expand and be displayed in alphabetical order. Look for and click on the Planned Projects option.
3. Note that you can look for Planned Projects by Anticipated Advertisement Date, Initiating Organization, Date Published or Agreement Number. Select the view option of your choice.
4. ECMS will feature a blinking NEW icon next to recently published planned projects. You can click on any Planned Project you wish to view. The Planned Project screen will describe the project and provide the anticipated advertisement date.