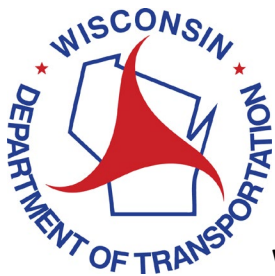


Create a Rate Card

6/1/2020



Wisconsin Department of Transportation

Version 1.0

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Version Notes

Version 1.0

- None

Navigate to a Prime Consultant Estimate

1 Additional Information

- Navigate to a Prime Consultant Estimate
- Navigate to a subconsultant Estimate

The user must have either the Consultant Negotiation User or Consultant Negotiation Admin role assigned to see a Consultant Estimate.

2 Determining Basis of Payment and Rate Cards

Before beginning a negotiation, confer with WisDOT to determine the basis of payment that will be used for the contract. The basis of payment will determine the type of rate card(s) created.

There are three types of rate cards:

- Individual Wage – Actual Cost plus Fixed Fee and Lump Sum bases of payments
- Specific Rate – Specific Rate of Compensation basis of payment
- N/A – Cost per Unit basis of payment

3 Applying Escalation

Escalation may be added to consultant cost to account for raises that the firm awards to employees during the duration of the contract. Estimates or escalation must reflect the firm's normal schedule for awarding raises.

Example: The Alpha Corporation is negotiating two contracts. The first contract will be for services performed from June 1, 2020 to December 1, 2020. The second contract will be for services performed between July 1, 2020 and March 1, 2021. The Alpha Corporation awards raises on January 1 of each year. In this case the second contract may include escalation, but the first one will not.

The escalation rate may not exceed the amount published on WisDOT's Consultant Notices webpage. (<https://wisconsin.gov/Pages/doing-bus/eng-consultants/notices/default.aspx>)

Escalation may be added in two way in Masterworks. The first is with a "Global Escalation" schedule that is applied to all employees listed in a rate card. The second is with rates and schedules applied to individuals within a rate card.

4 Using Market Rates

Firms without a WisDOT approved Consultant Financial Report may use the cost per unit, lump sum or specific rate of compensation basis of payment. When using lump sum or specific rate the fixed fee multiplier will be removed because the base wage is inclusive of direct labor, indirect and profit costs.

5 Using Specific Rate

Staff performing services under a contract will be named in the contract. Possible substitute(s) will also be included. The substitutes added will be shown with minimal hours.

Navigate to a Prime Consultant Estimate

Substitutes within a resource classification must have similar rates of pay. EX – the project leader is a senior engineer with a wage of \$35/hr. One of the substitutes is the department manager with a wage of \$55/hr. When performing the duties of project leader, the substitute will have a specific similar to the primary resource.

Class rates may be used when specific staff are unknown. Consult with WisDOT to determine which resources must be named and which may be added at class rates. In general, resources including project managers and/or project leaders must be named. When including class rates supporting documentation must be added to the negotiation to substantiate the rate. An estimate may be created based on the weighted average wages of employees listed in the rate card.

5.1 Adding Substitutes to Rate Cards

To reduce the potential for amendments possible, known substitutes should be added to rate cards to establish a rate for the known employees. The substitutes are added to the rate card and weighted at 1% of the contribution to the rate card.

5.2 Adding Class Rates to Rate Cards

When unknown employees will be contribution to a resource classification a class rate. A resource with the name "Class Rate" is added to the consultant's list of key staff and added to the rate card. The class rate is weighted at its expected contribution.

5.3 Example

In the example below, the known resources are contributing an estimated 90% of the resource class effort. An additional known substitute is contributing 1% of the resource class effort. Additional unknown employees (Con Tech Class Rate) are contributing and estimated 9% of the resource class effort. Dividing \$22.87 by 91% equals the Current Rate of the Con Tech Class Rate, in this case \$25.13.

Construction Technician - Mid					
Employee Name	Current Rate	% Pay Increase	Date of Increase	% Work at Current Rate	% contribution on project
Alpha Con Tech One	\$24.00	0.00%	1/1/2020	100%	40%
Alpha Con Tech Two	\$26.00	0.00%	1/1/2020	100%	50%
Alpha Con Tech Three	\$27.00	0.00%	1/1/2020	100%	1%
Con Tech Class Rate	\$25.13	0.00%	1/1/2020	100%	9%

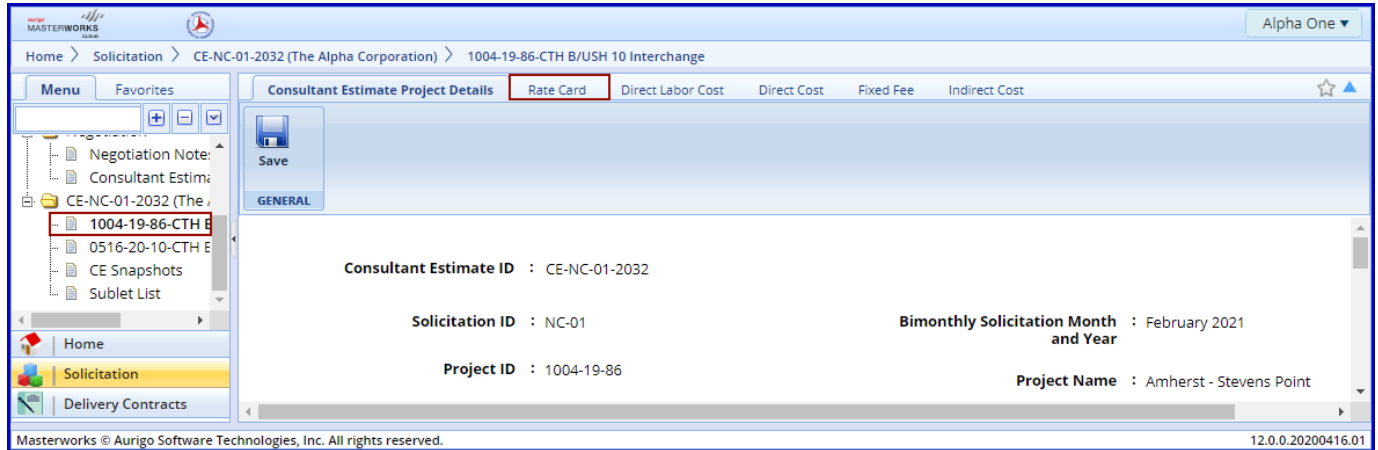
Class Rate Calculation	
$\$24 * 40\% =$	\$9.60
$\$26 * 50\% =$	\$13.00
$\$27 * 1\% =$	\$0.27
-	-
91%	\$22.87
$\$22.87 / 91\% =$	\$25.13

Navigate to a Prime Consultant Estimate

6 Create a Rate Card

6.1 Navigate to the Rate Card Tab

From the Consultant Estimate Project Details (negotiation summary) tab, click on the **Rate Card** tab.

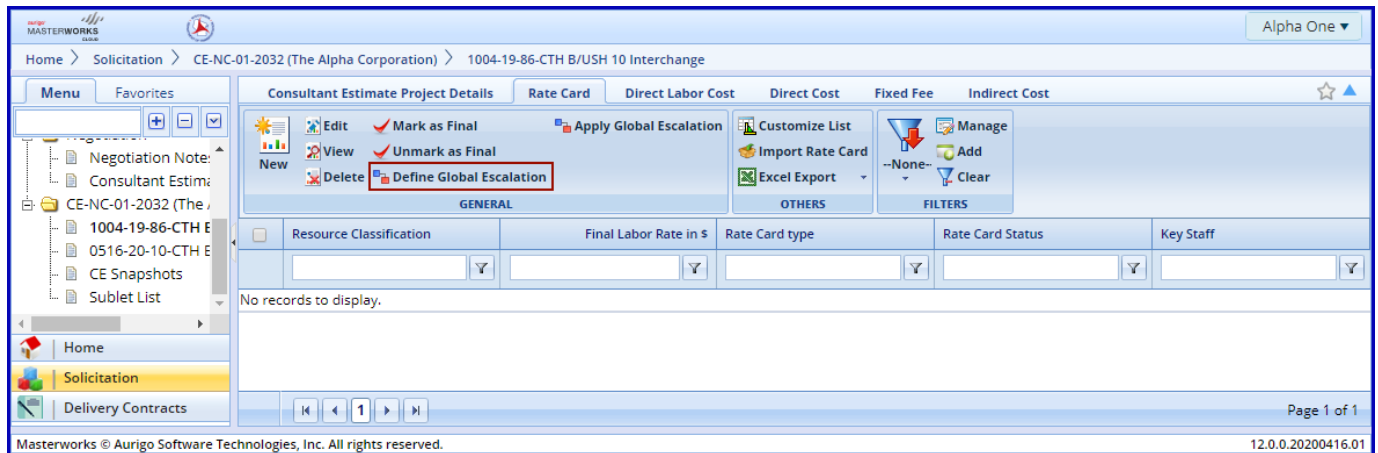


6.2 Set Global Escalation

Global escalation allows the user to set escalation for all staff in a rate card instead of setting escalation for each employee individually. Escalation may still be set/edited by individual employee.

6.2.1 Individual Wage Rate Cards

Click on the **Define Global Escalation** button.



Navigate to a Prime Consultant Estimate

The **Indirect Cost %** field may be skipped for individual wage rate cards, indirect costs will be added in the task list.

Home > Solicitation

Menu Favorites

- Solicitation List
- Bimonthly Solicitation L
- Construction Fair Packa
- Construction Fair
- Solicitations Respondec
- Negotiation
 - Negotiation Notes
 - Consultant Estimate
- CE-NC-01-2032 (The Alp
 - 1004-19-86-CTH B/U
 - 0516-20-10-CTH B/U
 - CE Snapshots
 - Sublet List

Home Solicitation Delivery Contracts

Alpha One

Consultant Global Escalation

Back Save GENERAL

Indirect Cost % : ...

Fixed Fee % : 7.25

Multiplication Factor :

Note: The above fields will only apply for Specific Rate and NA Type Rate Cards.

ESCALATION DETAILS

%Pay Increase*	Date of Increase*	% of Work at Current Rate*
No records to display.		
		0.00

Add Delete

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Click **Add** under the Escalation Details table to escalation.

Home > Solicitation

Menu Favorites

- Solicitation List
- Bimonthly Solicitation L
- Construction Fair Packa
- Construction Fair
- Solicitations Respondec
- Negotiation
 - Negotiation Notes
 - Consultant Estimate
- CE-NC-01-2032 (The Alp
 - 1004-19-86-CTH B/U
 - 0516-20-10-CTH B/U
 - CE Snapshots
 - Sublet List

Home Solicitation Delivery Contracts

Alpha One

Consultant Global Escalation

Back Save GENERAL

Indirect Cost % : ...

Fixed Fee % : 7.25

Multiplication Factor :

Note: The above fields will only apply for Specific Rate and NA Type Rate Cards.

ESCALATION DETAILS

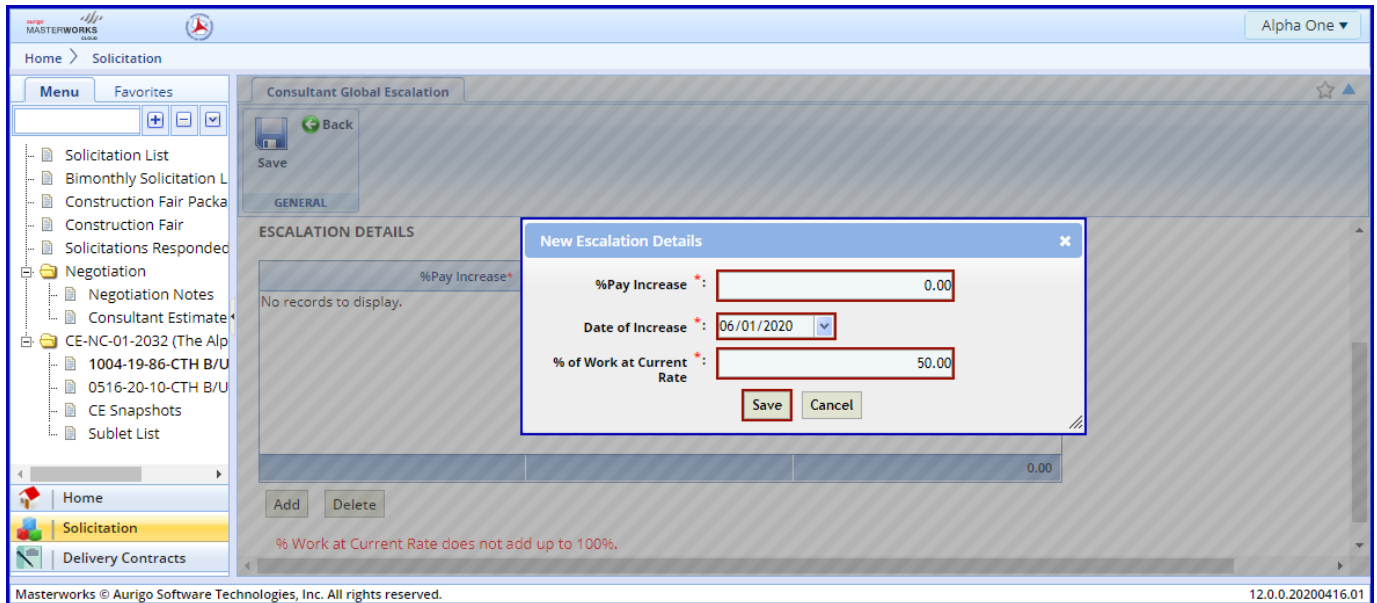
%Pay Increase*	Date of Increase*	% of Work at Current Rate*
No records to display.		
		0.00

Add Delete

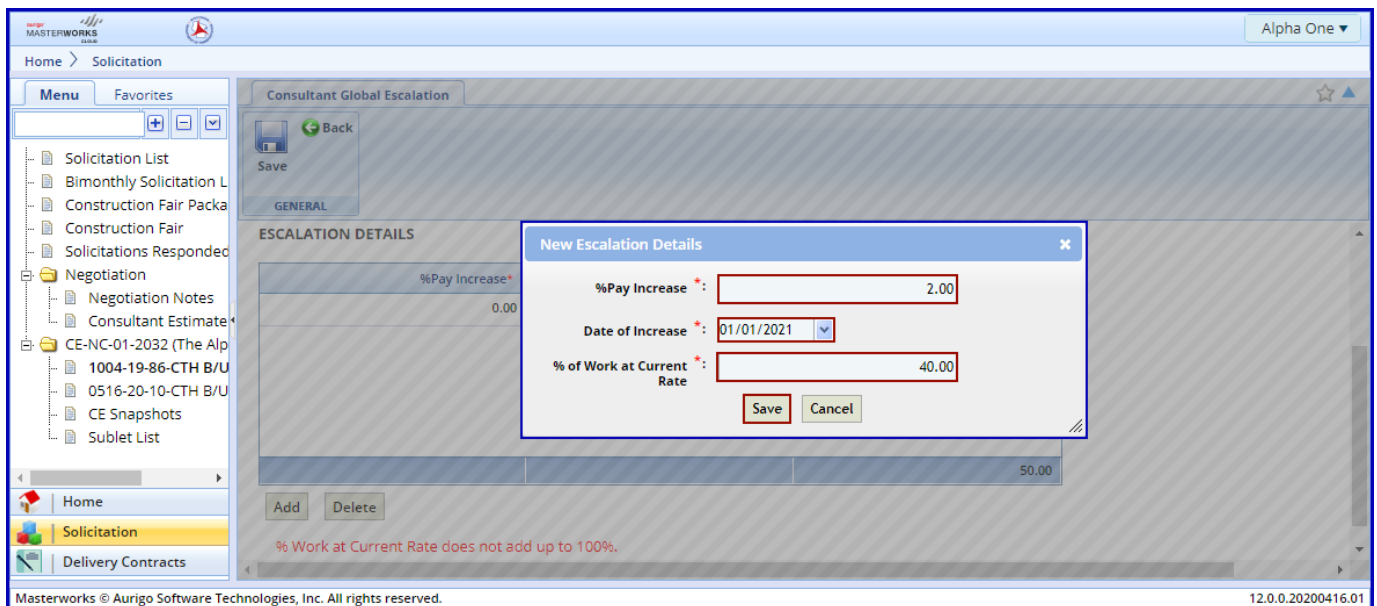
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Navigate to a Prime Consultant Estimate

First define the period the employee will be receiving the current rate of pay. Enter 0 as the **% pay increase**, today's date as the **Date of Increase** and the estimated amount of work that will be completed at this rate as the **% of Work at Current Rate**. If the employee will not be receiving escalation in the contract period enter 100 as the **% of Work at Current Rate**. Click **Save**.



If the employee will be receiving a wage increase during the contract time period click **Add** again. Enter percentage increase in the **% pay increase**, the scheduled date of the wage increase as the **Date of Increase** and the estimated amount of work that will be completed at this rate as the **% of Work at Current Rate**. Add as many details as necessary.



Navigate to a Prime Consultant Estimate

The **% of Work at Current Rate** column must sum to 100. If it over or under 100 a warning message is displayed at the bottom of the screen and the rates cannot be saved.

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%Pay Increase*	Date of Increase*	% of Work at Current Rate*
0.00	06/01/2020	50.00
2.00	01/01/2021	40.00
2.00	01/01/2022	20.00
		110.00

Add Delete

% Work at Current Rate does not add up to 100%.

If edits need to be made to any of the details double click in any of the cells and enter the new information.

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%Pay Increase*	Date of Increase*	% of Work at Current Rate*
0.00	06/01/2020	50.00
2.00	01/01/2021	40.00
2.00	01/01/2022	10
		110.00

Add Delete

% Work at Current Rate does not add up to 100%.

Navigate to a Prime Consultant Estimate

Click off the open field to save the change. When the **% of Work at Current Rate** column sums to 100, the warning will disappear. Click Save to **Save** all details.

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%Pay Increase*	Date of Increase*	% of Work at Current Rate*
0.00	06/01/2020	50.00
2.00	01/01/2021	40.00
2.00	01/01/2022	10.00
		100.00

Click **Back** to go back to the rate card list page.

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%Pay Increase*	Date of Increase*	% of Work at Current Rate*
0.00	06/01/2020	50.00
2.00	01/01/2021	40.00
2.00	01/01/2022	10.00
		100.00

Navigate to a Prime Consultant Estimate

6.2.3 Specific Rate Rate Cards

Click on the **Define Global Escalation** button.

The screenshot shows the Masterworks software interface. The breadcrumb navigation is: Home > Solicitation > CE-NC-01-2032 (The Alpha Corporation) > 0516-20-10-CTH B/USH 10 Interchange. The 'Rate Card' tab is active, and the 'Define Global Escalation' button is highlighted with a red box. The interface includes a left-hand navigation menu, a top toolbar with various actions like 'Edit', 'View', 'Delete', 'Apply Global Escalation', 'Import Rate Card', and 'Excel Export'. Below the toolbar, there are input fields for 'Resource Classification', 'Final Labor Rate in \$', 'Rate Card type', 'Rate Card Status', and 'Key Staff'. The main area displays 'No records to display.'

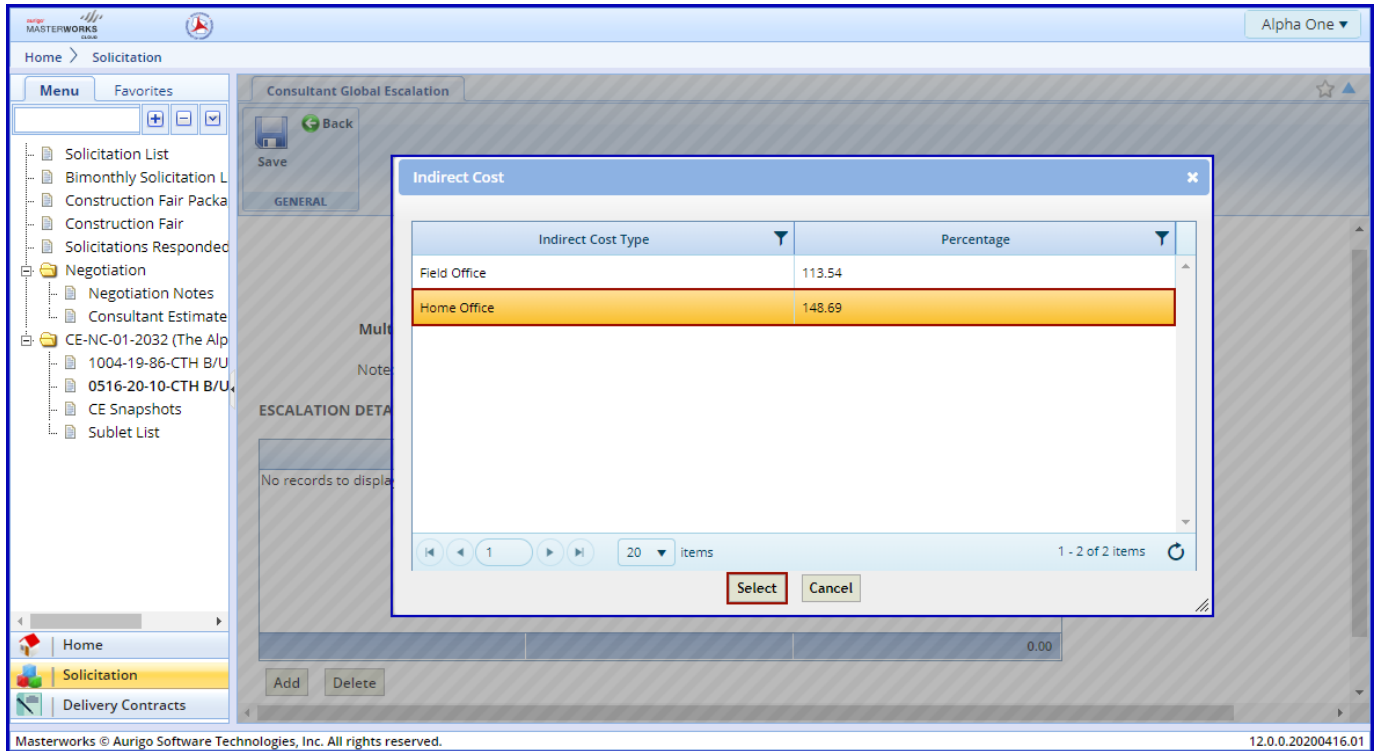
Set the **Indirect Cost %** by clicking on the ellipsis

The screenshot shows the 'Consultant Global Escalation' form in the Masterworks software. The 'Indirect Cost %' field is highlighted with a red box, and its ellipsis button is also highlighted. Other fields include 'Fixed Fee %' (7.25) and 'Multiplication Factor' (2.50). A note states: 'Note: The above fields will only apply for Specific Rate and NA Type Rate Cards.' Below this, there is an 'ESCALATION DETAILS' table with columns for '%Pay Increase*', 'Date of Increase*', and '% of Work at Current Rate*'. The table currently shows 'No records to display.' and a single row with '0.00' in the '% of Work at Current Rate*' column. The interface includes a left-hand navigation menu, a top toolbar with 'Back' and 'Save' buttons, and a bottom status bar.

Navigate to a Prime Consultant Estimate

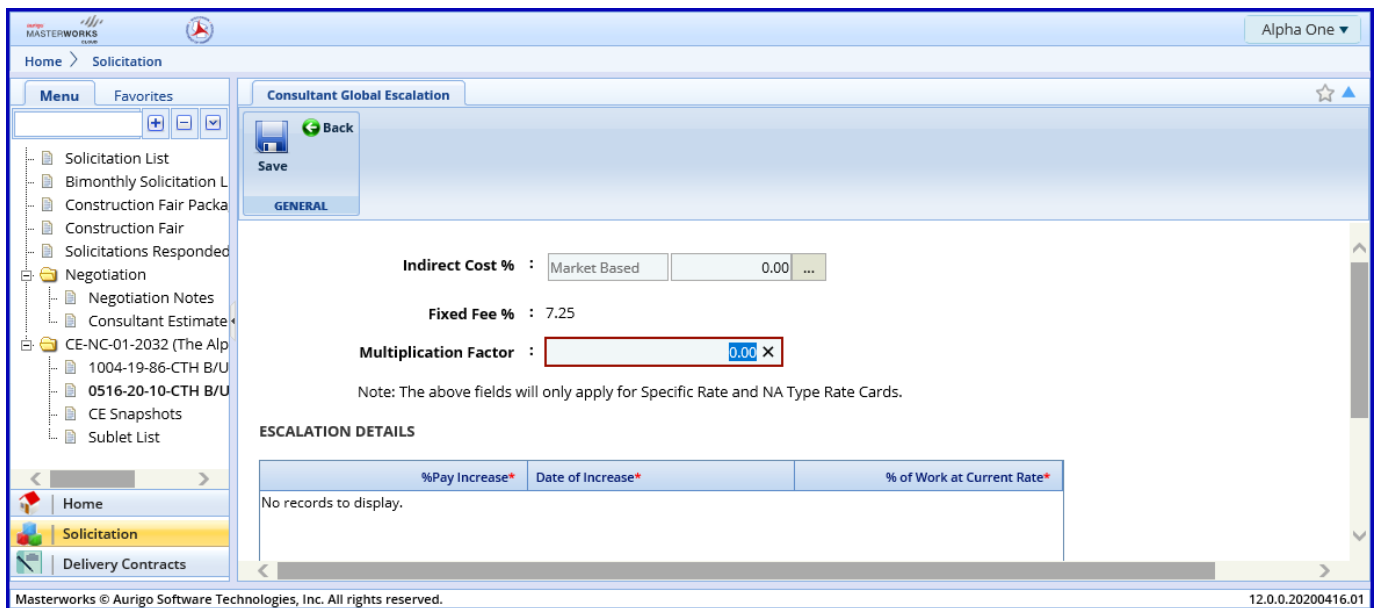
Select one of the available **Indirect Cost Types** by clicking on it. Click **Select**.

Firms that have submitted a Consultant Financial Report (CFR) to WisDOT select one of their approved indirect cost types and associated rates. Firms that do not submit a CFR to WisDOT use the Market Based option.



Market Rates Only:

If market rates are being used double click in the text box **Multiplication Factor** and type 0.



Navigate to a Prime Consultant Estimate

First define the period the employee will be receiving the current rate of pay. Enter 0 as the **% pay increase**, today's date as the **Date of Increase** and the estimated amount of work that will be completed at this rate as the **% of Work at Current Rate**. If the employee will not be receiving escalation in the contract period enter 100 as the % of Work at Current Rate. Click **Save**.

The screenshot shows the Masterworks software interface. The main window is titled 'Consultant Global Escalation'. A 'New Escalation Details' dialog box is open, showing the following fields:

- %Pay Increase: 0.00
- Date of Increase: 06/01/2020
- % of Work at Current Rate: 50.00

The background shows a table with one row containing 0.00. A red error message at the bottom states '% Work at Current Rate does not add up to 100%'.

If the employee will be receiving a wage increase during the contract time period click **Add** again. Enter percentage increase in the **% pay increase**, the scheduled date of the wage increase as the **Date of Increase** and the estimated amount of work that will be completed at this rate as the **% of Work at Current Rate**. Add as many details as necessary.

The screenshot shows the Masterworks software interface. The main window is titled 'Consultant Global Escalation'. A 'New Escalation Details' dialog box is open, showing the following fields:

- %Pay Increase: 2.00
- Date of Increase: 01/01/2021
- % of Work at Current Rate: 40.00

The background shows a table with one row containing 50.00. A red error message at the bottom states '% Work at Current Rate does not add up to 100%'.

Navigate to a Prime Consultant Estimate

The **% of Work at Current Rate** column must sum to 100. If it over or under 100 a warning message is displayed at the bottom of the screen and the rates cannot be saved.

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%Pay Increase*	Date of Increase*	% of Work at Current Rate*
0.00	06/01/2020	50.00
2.00	01/01/2021	40.00
2.00	01/01/2022	5.00
		95.00

Warning: % Work at Current Rate does not add up to 100%.

If edits need to be made to any of the details double click in any of the cells and enter the new information.

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%Pay Increase*	Date of Increase*	% of Work at Current Rate*
0.00	06/01/2020	50.00
2.00	01/01/2021	40.00
2.00	01/01/2022	<input type="text" value="10"/>
		95.00

Warning: % Work at Current Rate does not add up to 100%.

Navigate to a Prime Consultant Estimate

Click off the open field to save the change. When the **% of Work at Current Rate** column sums to 100, the warning will disappear. Click Save to **Save** all details.

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Click **Back** to go back to the rate card list page.

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Navigate to a Prime Consultant Estimate

6.4 Create a Rate Card

On the rate card list page click **New**.

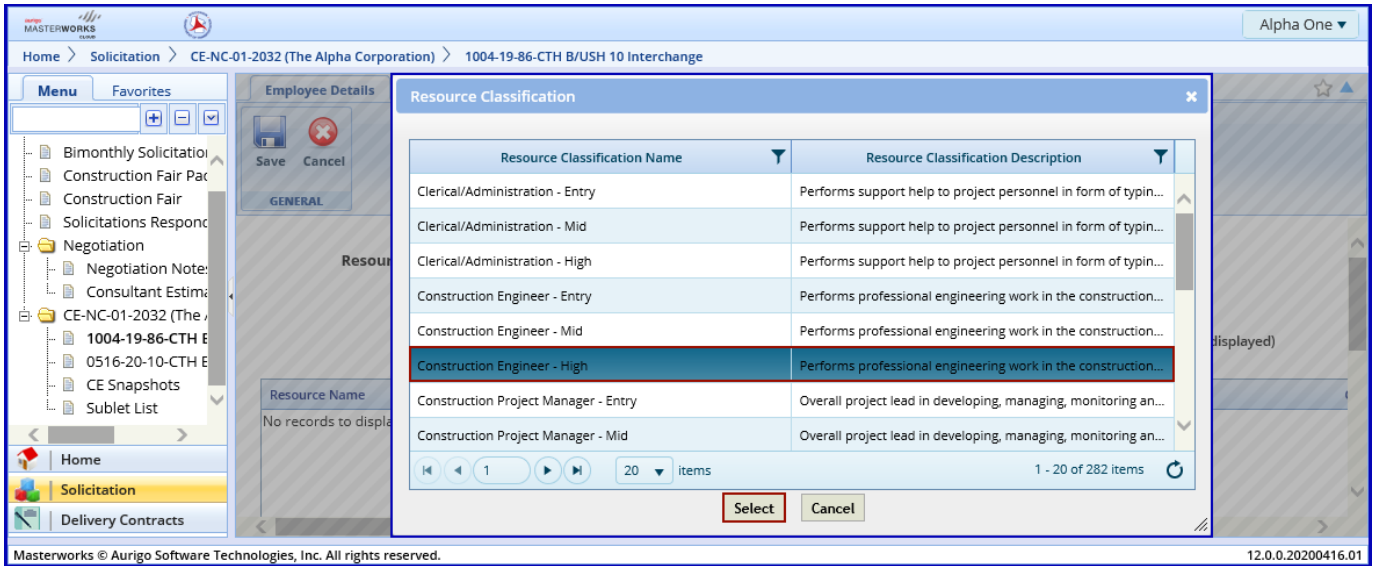
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Select a **Resource Classification** by clicking on the Ellipsis

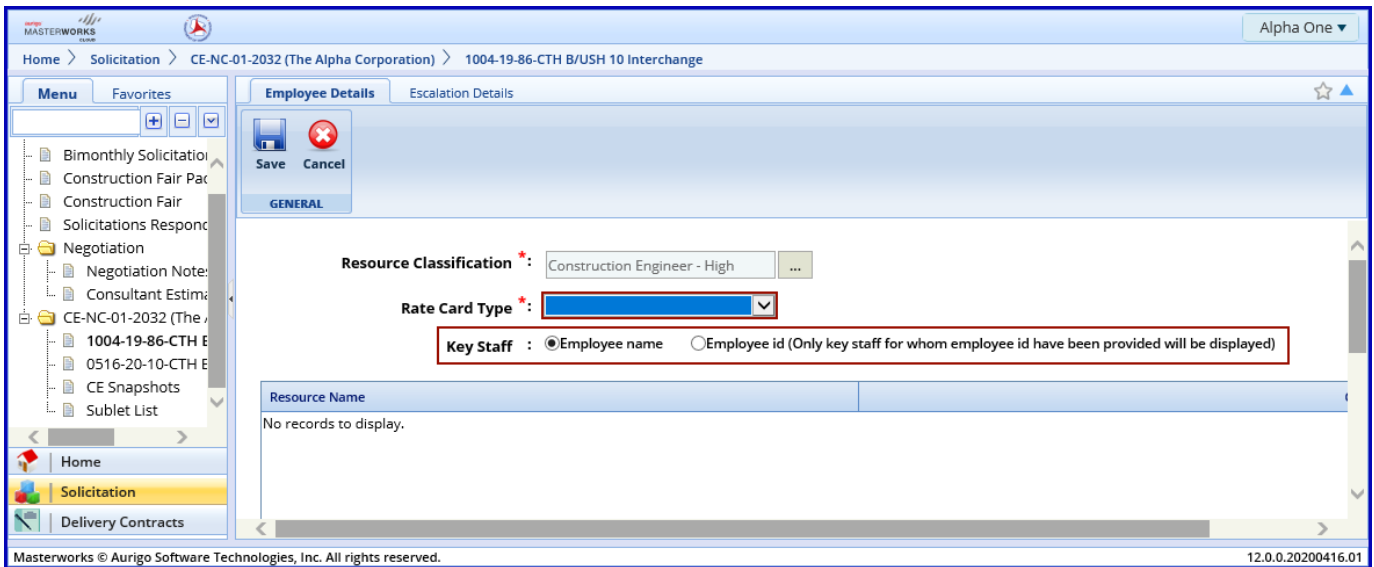
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Navigate to a Prime Consultant Estimate

Select a resource classification and click **Select**.

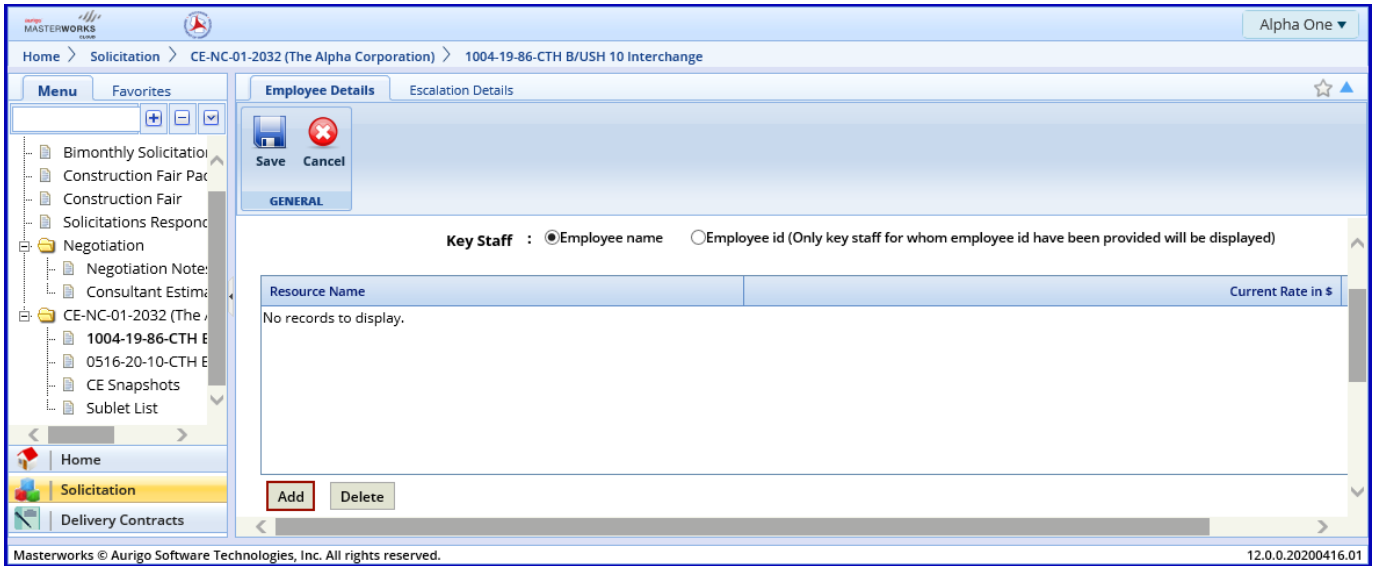


Select a **Rate Card Type** from the dropdown. In **Key Staff**, use the radio buttons to choose if employee names will be displayed in the rate card or not.

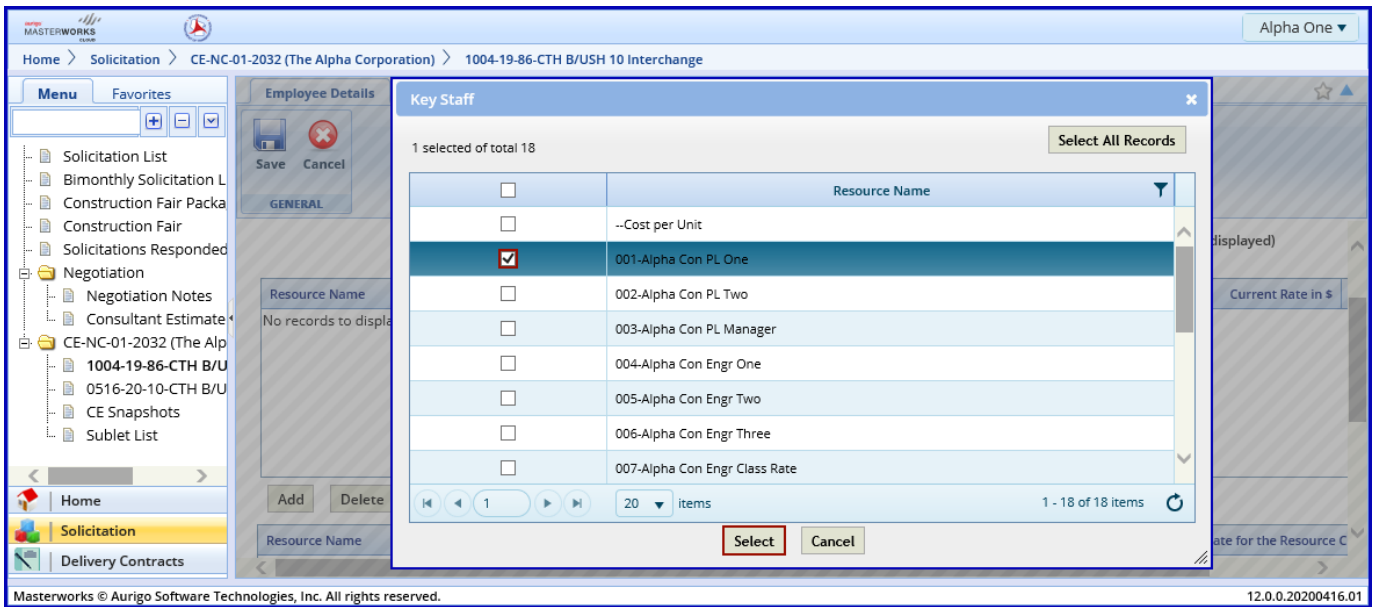


Navigate to a Prime Consultant Estimate

Click **Add** under the resource grid.



Select employee(s) using the checkboxes ✓ and click **Select**.



Navigate to a Prime Consultant Estimate

Double click in the field below **Current Rate in \$** and add the employee's rate. For consultants with a CFR, this is employee's base wage. For consultant without a CFR, it is the employee's market (total billing) rate, inclusive of base wage, indirect cost and profit.

The screenshot shows the Masterworks software interface. The breadcrumb navigation is: Home > Solicitation > CE-NC-01-2032 (The Alpha Corporation) > 1004-19-86-CTH B/USH 10 Interchange. The left sidebar shows a tree view with 'Solicitation' selected. The main area is titled 'Employee Details' and has a 'GENERAL' tab. At the top, there are 'Save' and 'Cancel' buttons. Below that, there are radio buttons for 'Key Staff': Employee name and Employee id (Only key staff for whom employee id have been provided will be displayed). A table below has two columns: 'Resource Name' and 'Current Rate in \$'. The first row contains '001-Alpha Con PL One' and '43'. The '43' is highlighted with a red box. Below the table are 'Add' and 'Delete' buttons. At the bottom, there is a summary table with columns: 'Resource Name', 'Weighted Average Hourly Rate in \$', '% Contribution on Project', and 'Blended Rate for the Resource C'. The footer contains 'Masterworks © Aurigo Software Technologies, Inc. All rights reserved.' and the version '12.0.0.20200416.01'.

Click off the field. Click **Save**.

This screenshot is identical to the previous one, but the 'Current Rate in \$' field now displays the value '43' instead of being highlighted. The 'Save' button at the top left of the form is now highlighted with a red box, indicating it has been clicked. All other elements, including the breadcrumb navigation, sidebar, and table, remain the same.

Navigate to a Prime Consultant Estimate

From the rate card list page, select rate cards using the checkboxes ✓ and click **Apply Global Escalation**.

The screenshot shows the Masterworks software interface. The breadcrumb path is Home > Solicitation > CE-NC-01-2032 (The Alpha Corporation) > 1004-19-86-CTH B/USH 10 Interchange. The 'Rate Card' tab is active, and the 'Apply Global Escalation' button is highlighted with a red box. The table below shows a selected rate card for 'Construction Engineer - High'.

Resource Classification	Final Labor Rate in \$	Rate Card type	Rate Card Status	Key Staff
<input checked="" type="checkbox"/> Construction Engineer - High		Individual	Not Final	Employee name

Click **OK** on the warning popup that appears.

The screenshot shows the same interface as the previous one, but with a warning dialog box overlaid. The dialog box contains the following text: "Message from webpage", a question mark icon, and "Applying Global Escalation will overwrite the Escalation Details of All Employees added to the Rate Cards with the Defined Global Escalation rates. Are you sure you want to continue?". There are 'OK' and 'Cancel' buttons at the bottom of the dialog box.

A green success message appears.

The screenshot shows the same interface as the previous one, but with a green success message overlaid. The message reads: "Global Escalation Applied Successfully." with a green checkmark icon. The 'Apply Global Escalation' button is no longer highlighted.

Navigate to a Prime Consultant Estimate

Select rate card(s) using the checkboxes ✓ and click **Edit**.

The screenshot shows the Masterworks software interface. The breadcrumb path is Home > Solicitation > CE-NC-01-2032 (The Alpha Corporation) > 1004-19-86-CTH B/USH 10 Interchange. The main menu includes Consultant Estimate Project Details, Rate Card, Direct Labor Cost, Direct Cost, Fixed Fee, and Indirect Cost. The Rate Card grid is visible with the following data:

Resource Classification	Final Labor Rate in \$	Rate Card type	Rate Card Status	Key Staff
<input checked="" type="checkbox"/> Construction Engineer - High	0.00	Individual	Not Final	Employee name

In the resource contribution grid, select a resource and click **Edit**.

The screenshot shows the Masterworks software interface with the Employee Details form open. The breadcrumb path is Home > Solicitation > CE-NC-01-2032 (The Alpha Corporation) > 1004-19-86-CTH B/USH 10 Interchange. The form shows the following details:

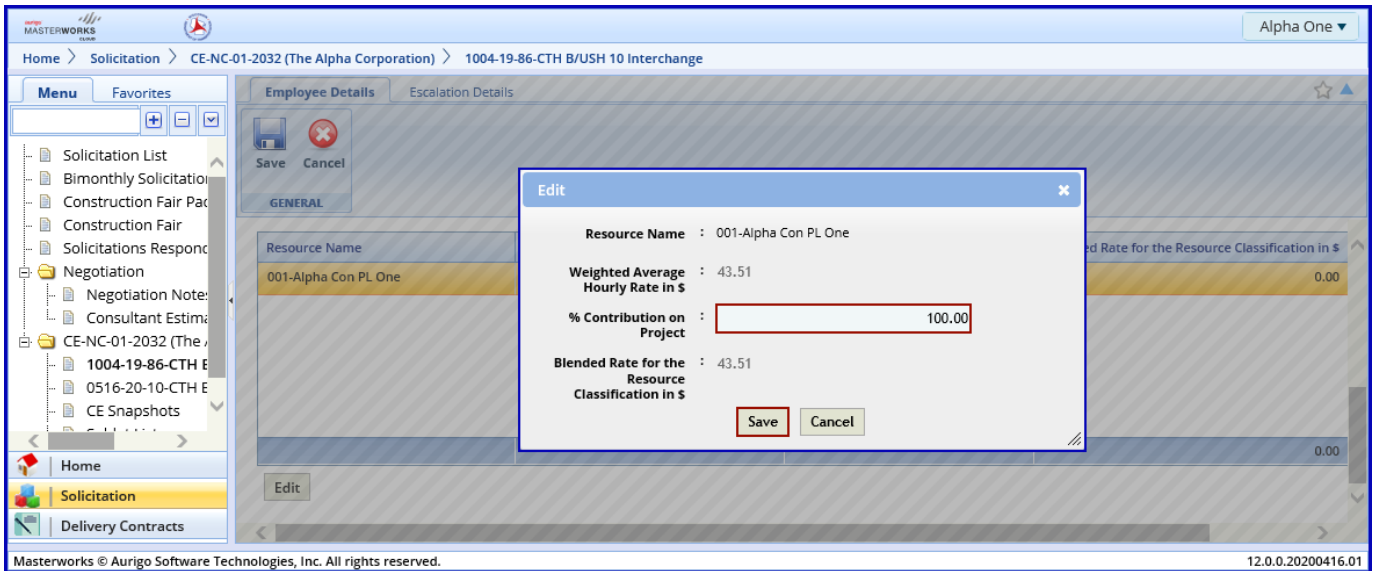
- Rate Card Type: Individual Wage
- Key Staff: Employee name Employee id (Only key staff for whom employee id have been provided will be displayed)

The resource contribution grid is displayed below:

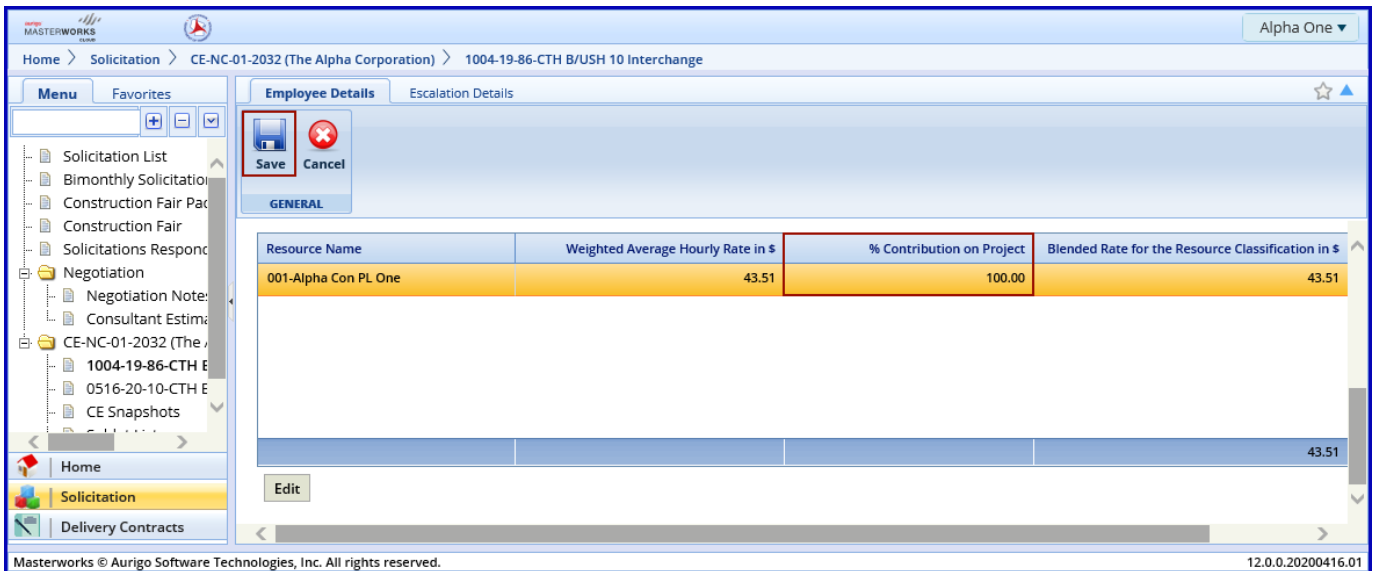
Resource Name	Weighted Average Hourly Rate in \$	% Contribution on Project	Blended Rate for the Resource Classification in \$
001-Alpha Con PL One	43.51	0.00	0.00

Navigate to a Prime Consultant Estimate

Enter the employee's contribution as an integer percent (1-100) to the resource classification in the **% Contribution on Project:** field and click **Save**.



The **% Contribution on Project** column must sum to 100.



Navigate to a Prime Consultant Estimate

Select rate card(s) using the checkboxes ✓ and click **Mark as Final**.

The screenshot shows the Masterworks software interface. The breadcrumb navigation is: Home > Solicitation > CE-NC-01-2032 (The Alpha Corporation) > 1004-19-86-CTH B/USH 10 Interchange. The 'Rate Card' tab is active. In the top toolbar, the 'Mark as Final' button is highlighted with a red box. Below the toolbar is a table with the following data:

<input checked="" type="checkbox"/>	Resource Classification	Final Labor Rate in \$	Rate Card type	Rate Card Status	Key Staff
<input checked="" type="checkbox"/>	Construction Engineer - High	0.00	Individual	Not Final	Employee name

When the Rate Card Status shows Final employees included in the rate card may be added to direct labor costs.

The screenshot shows the Masterworks software interface. The breadcrumb navigation is: Home > Solicitation > CE-NC-01-2032 (The Alpha Corporation) > 1004-19-86-CTH B/USH 10 Interchange. The 'Rate Card' tab is active. In the top toolbar, the 'Mark as Final' button is highlighted with a red box. Below the toolbar is a table with the following data:

<input type="checkbox"/>	Resource Classification	Final Labor Rate in \$	Rate Card type	Rate Card Status	Key Staff
<input type="checkbox"/>	Construction Engineer - High	43.51	Individual	Final	Employee name