



INSTRUCTIONS ON COMPLETING SUBCONTRACTOR/SUBCONSULTANT SCHEDULES 1 – 4

Respondents must complete and correctly execute the required OSBD Schedules when responding to a solicitation and submitting payment requests after contract award. As long as there is a required API goal, Schedules 1, 2 and 2(a) must be submitted with all bids or proposals from subcontractors and subconsultants in order to be considered responsive to the solicitation.

Important Points to Remember

- A. Schedule 1** must be completed by the Prime Contractor and submitted with their bid or proposal.
 - 1. Section “A” of this form must be properly completed by all Prime Contractor/Consultants. Regardless of whether the Prime is a certified or non-certified company. Include the company name, address, contact person, and information, as well as the dollar amount or percentage of work that the prime is responsible for completing.
 - 2. Section “B” of this form must list all Subcontractor(s)/Subconsultant(s) to be utilized on this project. Please check the appropriate box if the Subcontractor(s)/subconsultant(s) is certified as a PBC-OSBD SBE or Non-SBE.
 - 3. The Prime is to indicate the dollar amount or percentage of work for all subcontractors/subconsultants. All subcontractors/subconsultants must be identified as either SBE or Non-SBE and include the dollar amount or percentage of work under the applicable designation.
 - 4. At the very bottom of the Schedule, write down the total bid amount or percentage of work that will be completed by SBEs.
 - 5. The Prime or authorized individual must print, sign and date the form.
- B. Schedule 2 or 2(a)** must be properly executed and submitted with the bid/proposal for all subcontractors/subconsultants listed on Schedule 1.
 - 1. **Specify in detail** the work to be performed or material supplied, along with the dollar amount or percentage of work for each item and corresponding line item number(s), when available.
 - 2. If there is a portion of the work that **will not** be performed by the subcontractor/subconsultant, a separate, properly executed Schedule 2 must be submitted for all 2nd and 3rd tier Subcontractors/subconsultants. The original subcontractor/subconsultant must indicate that information in the “red box” located in the middle of the form.
 - 3. All subcontractors/subconsultants must print, sign and date the form.
- C. Schedule 3** is completed by the Prime and submitted with each payment request made to Palm Beach County.
 - 1. In the subcontracting Information section, list the Name(s) of each subcontractor on the project and the total contracted amount for each subcontractor.
 - 2. As the project proceeds, complete each column under the subcontracting Information section accordingly to show, approved change orders, revised contract amounts, amounts drawn this pay period, amounts drawn to date, amounts paid to date and the starting date of the subcontractors.
 - 3. In the SBE Subcontractor Category section, check the appropriate designation for each subcontractor.

4. The Schedule 3 must be signed by the Prime's designated individual and must include the person's title.
- D. **Schedule 3(a)** is used for professional services contracts only. This Schedule is completed by the Prime and submitted with each payment request made to Palm Beach County.
1. The Prime must complete all of the necessary information, which includes the project name, CSA name and number, contract amounts (original and amended, if applicable), and the Pay Application number.
 2. The Prime must indicate the percentage of work performed with their own workforce and the amount paid to date.
 3. In the "Sub-Consultants" section of the Schedule, the Prime must list the firms' name and their contract amount. The date when that sub begins their work, the amount paid to date, when applicable, and the percentage of work they have completed by the date of the payment request.
 4. The Schedule 3(a) must be signed by the Prime's designated individual and must include the person's title.
- E. **Schedule 4** is supplied in a fillable PDF form that allows the Prime to enter the requested information, which is then submitted by the Prime to reflect actual payments made to each subcontractor/subconsultant.
1. The Prime is not to request signature from a Subcontractor/subconsultant unless it has made payment to the Subcontractor/subconsultant.
 2. A separate Schedule 4 is required for each Subcontractor/sub consultant.
 3. A separate Schedule 4 is required for each contract and payment request in which a disbursement has been made to a subcontractor or sub consultant.
 4. A fillable pdf Schedule 4 will be emailed to the prime contractor by the user department. The user department will pre-fill the spaces on the form that pertain to the Department number, project number, and Prime contractor's vendor code.
 5. The Prime will type in the Subcontractor/sub consultant name, payment amount, work order number, if applicable, payment date, and Subcontractor/sub consultant vendor code in the fillable form fields. Subcontractor/sub consultant vendor codes can be found through the OSBD website at <https://pbc.gov/pbcvendors>.
 6. The Prime will either print the form for the Subcontractor/subconsultant to sign and have notarized, or send the form electronically for digital signature and notarization, if possible, verifying that the information is correct. The Subcontractor/subconsultant must provide information as to whether a portion of the payment received will be disbursed to another Subcontractors/sub consultant. If the Subcontractor/subconsultants indicates that a portion of their payment will be disbursed to 2nd or 3rd tier sub, a separate Schedule 2 must be submitted for the Subcontractor/sub consultant listed.
 7. The **original** completed Schedule 4 is submitted to Palm Beach County with the Prime's payment request documents.
- F. **If it is believed that a violation of the SBD Ordinance has occurred, a complaint may be filed with the OSBD. A link to the complaint/violation form is provided on the home page of the OSBD website: <https://discover.pbc.gov/HED/osbd> .**