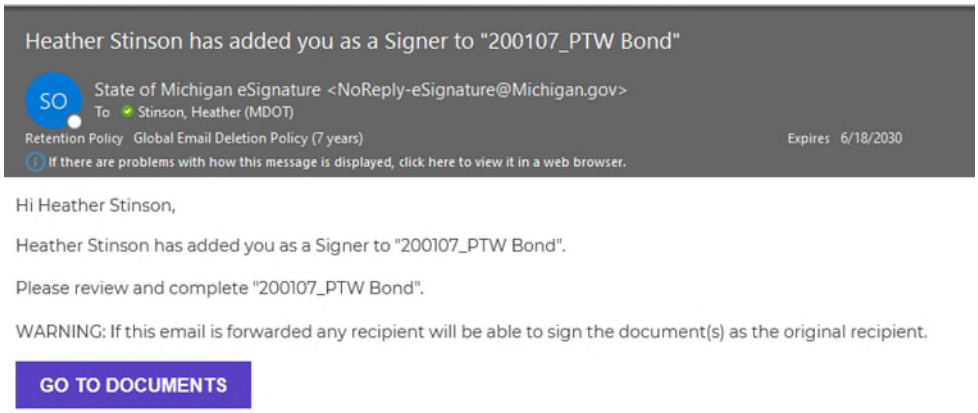
Helpful Tips for Using OneSpan to Sign Construction Contracts

- An initiator is the person that starts a transaction in OneSpan.
- Prime contractors will initiate Prime Warranty Bonds.
- Subcontractors will initiate Pass-Through Warranty Bonds.
- MDOT will initiate Contracts and Pass-Through Warranty Contracts **AFTER** all documents and approvals are received including DBE sheets, local agency agreements, etc.
- Authorized signers and persons initiating transactions for prime contractors and subcontractors must have a OneSpan "sender" account. Contact MDOT-eSign@Michigan.gov to apply for a Digital Signature Account.
- Surety agents are considered "signers" only and do not require any type of OneSpan account.
- After you split your contract package into separate documents (Contract, Prime Bonds, etc.), be sure to e-mail the unsigned two pages of the contract, and any PTW contracts, to MDOT-Awards@Michigan.gov.
  - MDOT will initiate the contract pages once the contract is ready for award (after all documents and approvals are received, including DBE sheets, local agency agreements, etc.)
  - If the naming convention of contract ID followed by document type (for example, 83000-123456 Prime Bonds.pdf or 83000-123456 Contract.pdf) is not followed, your document may be rejected, and you will be required to re-submit it with the correct name.
- When initiators are entering the surety agent and authorized signer's First Name and Last Name in a OneSpan transaction, the names must **exactly** match the surety agent's name on the Power of Attorney, or the authorized signer's name in the prequalification application.
  - As a prime or subcontractor, you may want to coordinate with your surety agent/company to ensure the agent's name is properly listed. Since there are several individuals that may sign for a surety company, the contractor will want to have a list of names for proper input into OneSpan.
  - If the name input into OneSpan does not match the surety's POA or the authorized signature in the prequalification application, the bonds will be rejected by MDOT and a new transaction will be required.
  - For middle initials, add it after the First Name.
  - For Jr., Sr., II, III, etc., add it after the Last Name.
- A resource e-mail address may be used in OneSpan; however, be sure to enter a person's First Name and Last Name that has access to that resource e-mail box.
- If the person's name you entered is not signing the document, they have the ability to re-assign it.
- Surety agents – date the POA before uploading it.
- Do not mark a transaction as complete if the surety agent did not attach their POA.
- You may decline to sign a document.
  - Under More Options in the upper right, click on Decline to Sign.
  - Enter a reason.
  - Click on Decline.
  - The person that initiated the transaction will receive an e-mail stating you declined to sign.
  - The initiator will need to start a new transaction.
    - Reasons for declining to sign may include:
      - As a surety, you're not able to upload a picture of a seal (initiator did not toggle on the "from file" option as stated in their instructions).

    - As an authorized signer, surety did not attach their POA.
    - As an authorized signer, there is no signature field for you (initiator did not place a signature field as stated in the instructions).
- All templates are pre-configured. Do not change anything in the template including signing order, text fields, signature fields, recipient settings, etc. This will invalidate the workflow and cause you to begin a new transaction.
- Be sure to add "State of Michigan eSignature" to your trusted contacts to ensure e-mail notifications are delivered properly. The e-mail notification is the only way to know when a document is ready for your signature or when a document is completed. Here is an example of the e-mail:



PRIME CONTRACTOR INSTRUCTIONS – Part One

This document preparation can be done by any employee of the prime contractor.

Download Contract Package.pdf from ProjectWise when you receive your e-mail notification that it's there.

Split the Contract Package into the following separate documents by extracting these pages and **saving as the contract ID followed by "Contract," Prime Bonds," etc. For example – 25000-123456 Contract.pdf. Documents may be rejected if the naming convention is not followed.**

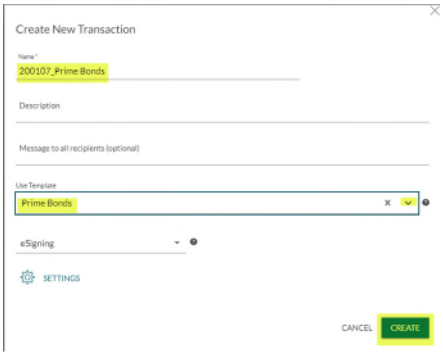
The extract feature must be used. Printing to PDF will render the text tags useless in OneSpan and your surety agent will not be able to add text to the bonds.

We understand asking the contractor to separate the contract is not ideal and MDOT will be pursuing a change to our internal system that will automatically split the documents upon creation.

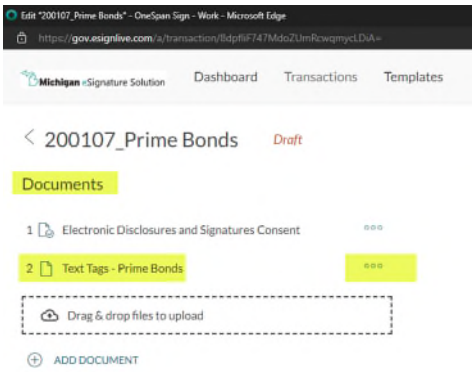
- Contract
  - Contract Cover Page
  - Contract Signature Page
  - Save as *Contract ID Contract*.pdf (example: 83000-654321.Contract)
  - ***E-mail these two pages only, unsigned, to MDOT-Awards@Michigan.gov (the signatures for the contract will be initiated by MDOT-Awards once the contract is ready to be awarded, after all other documents and approvals are received.)***
- Prime Bonds
  - Bonds Cover Page
  - Performance Bond
  - Lien Bond
  - Endorsement
  - Warranty Bond(s), if applicable (meaning prime holds a warranty)
  - Save as *Contract ID Prime Bonds*.pdf (example: 83000-654321.Prime Bonds)
- PTW Contract (separate document for each PTW)
  - Save as *Contract ID PTW Contract*.pdf. If more than one PTW, save as *Contract ID PTW Contract 1*.pdf, *Contract ID PTW Contract2*.pdf, etc. (example: 83000-654321 PTW Contract1.pdf)
  - ***E-mail the PTW Contract(s), unsigned, to MDOT-Awards@Michigan.gov (the signatures for the PTW contract will be initiated by MDOT-Awards once the contract is ready to be awarded, after all other documents and approvals are received.)***
- PTW Bond (separate document for each PTW)
  - Save as *Contract ID PTW Bond*.pdf. If more than one PTW, save as *Contract ID PTW Bond1*.pdf, *Contract ID PTW Bond2*.pdf, etc. (example: 83000-654321 PTW Bond1.pdf)
  - ***E-mail the PTW Bond(s) to your pass-through warranty subcontractor.***

To prepare the bond documents for your surety agent, from MiLogin for Third party, an employee with a sender account must:

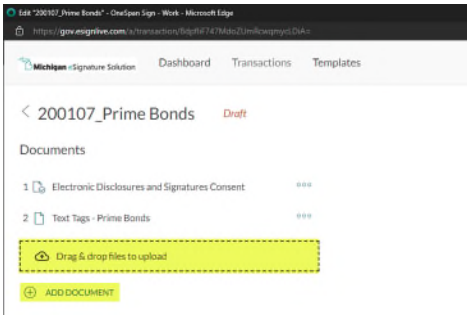
1. Click on Enterprise eSignature Sender
2. Acknowledge/Agree
3. Click on New Transaction
4. Enter Transaction Name as *Contract ID* Prime Bonds
    - Example: 83000-123456 Prime Bonds.pdf
5. In Use Template field, select "Prime Bonds"
6. Click on Create



7. Under Documents, click on the three dots next to "Text Tags – Prime Bonds" and chose Remove. ***<u>If this step is not completed, the incorrect document will be sent to your surety agent, and they will not be able to sign</u>***.



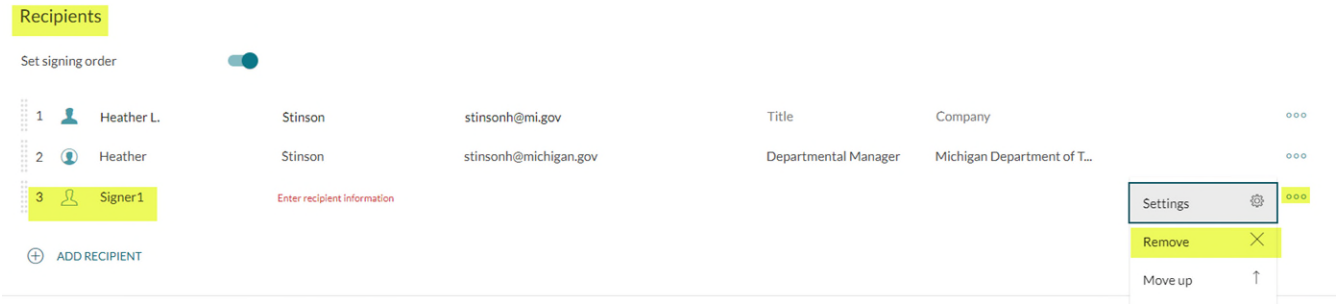
8. Confirm that you want to delete it.
9. Drag your Prime Bonds document that you separated from the Contract Package.pdf and drop in Michigan eSignature Solution "Drag & drop files to upload" box or click on the plus symbol next to "ADD DOCUMENT" and navigate to select the document.



10. Under “Recipients,” click on the silhouette next to “PRIME_SURETY.” As the initiator, your name will appear as the number 2 recipient.

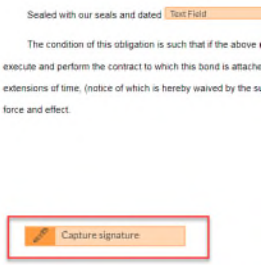
11. Choose “Recipient”
    - **Enter the EXACT name of your surety agent, and their E-mail address *(resource e-mail addresses are accepted).* If your surety agent uses a middle initial, enter it in the “First Name” box. If they use Jr., Sr., II, III, etc., enter that in the “Last Name” box.**
        - ***IT IS VERY IMPORTANT THAT THE NAME ENTERED EXACTLY MATCHES THE NAME OF YOUR SURETY AGENT ON THE SURETY’S POA. If the name does not match, your bonds will be rejected, and you will have to start a new transaction.***

12. **a. If you, as the initiator, will be signing the bonds** as an authorized signer, you MUST delete the number 3 “Signer1.” Click on the three dots on the right and choose Remove.

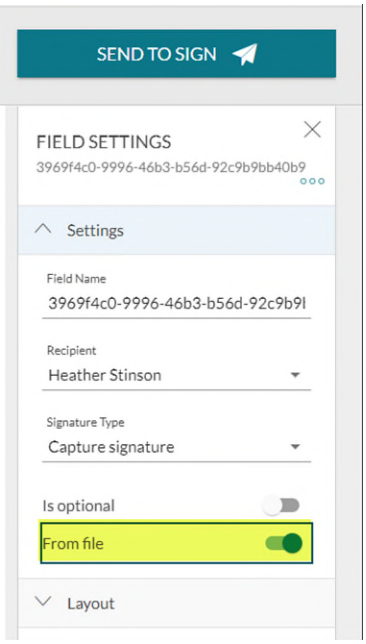


b. If you, as the initiator, are preparing the bonds but will *not* be signing them, click on the silhouette next to the number 3 Signer1 and choose Recipient. Enter the EXACT name of the authorized signer who will be signing the bonds for your company. If your authorized signer uses a middle initial, enter it in the “First Name” box. If they use Jr., Sr., II, III, etc., enter that in the “Last Name” box.
    - ***IT IS VERY IMPORTANT THAT THE NAME ENTERED EXACTLY MATCHES THE NAME OF YOUR AUTHORIZED SIGNER IN YOUR COMPANY’S PREQUALIFICATION APPLICATION. If the name does not match, your bonds will be rejected and you will have to start a new transaction.***

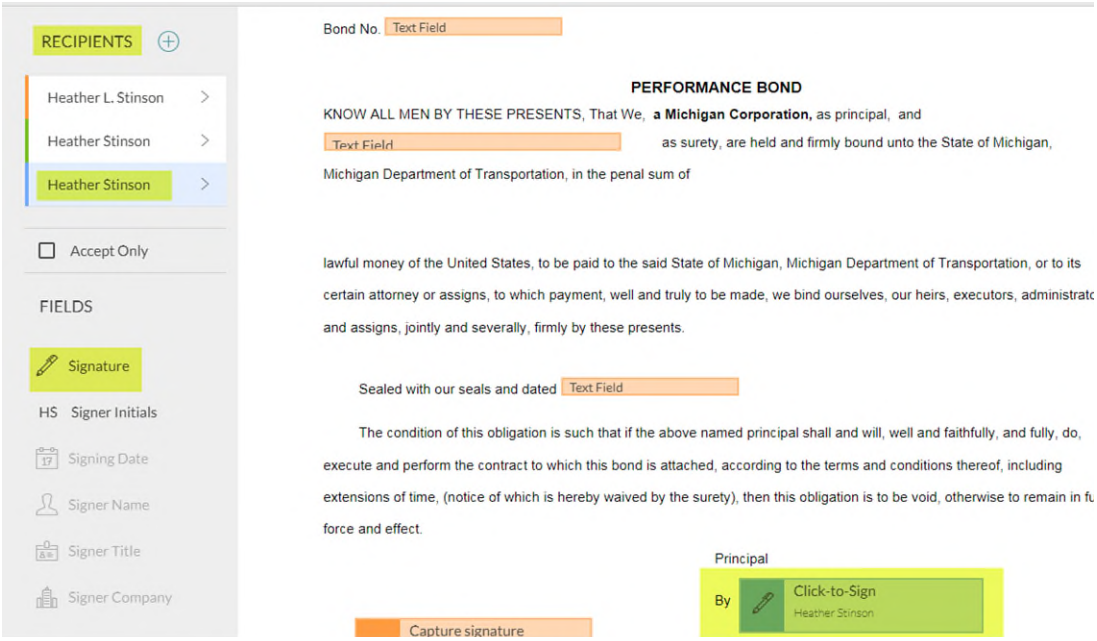
13. Click on NEXT >
14. Scroll through the document and click on the Capture Signature field on the Performance Bond, Lien Bond, Endorsement and, if applicable, each Warranty Bond.



15. On the right-hand side under FIELD SETTINGS, toggle on the "From File" – **YOU MUST DO THIS FOR EACH BOND IN THE TRANSACTION. If it is not completed, the surety will decline to sign and you'll have to start a new transaction.**



16. Add a "Signature" field for the authorized signer, whether you or someone else will be signing the bonds. ***<u>If this step is not completed, the authorized signer will not be able to sign the bonds and you will have to start a new transaction</u>.***
    - Under RECIPIENTS, click on the authorized signer's name.
    - Under FIELDS, click on Signature
    - Drag a signature field to EACH bond page and drop it next to "By" under "Principal" on the Performance Bond, Lien Bond, Endorsement, and under "Contractor" on the warranty bond(s). ***<u>This must be done on each bond page. If one is missed, the signer will decline to sign, and you will have to start a new transaction.</u>***



17. Click on SEND TO SIGN in the upper right-hand corner.

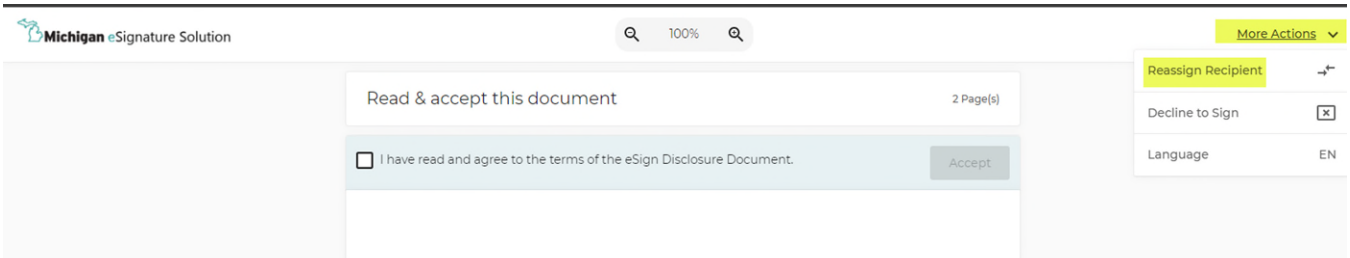
18. In the Confirm box, click on SEND or Cancel if you realize you forgot to toggle on the From File in the Capture Signature fields for one or more of the bond pages, or forgot to add Signature fields for your authorized signer, if necessary (step 16).

Your surety agent will receive an e-mail from “State of Michigan eSignature” informing them you have added them as a signer.

SURETY AGENT INSTRUCTIONS

1. Click on the "GO TO DOCUMENTS" link in the e-mail to open the bonds in OneSpan. Be sure to add "State of Michigan eSignature" to your trusted contacts.

2. When the Michigan eSignature Solution opens, click in the checkbox and click on Accept.
3. If you want to re-assign this document to another agent, click on More Actions in the upper right.

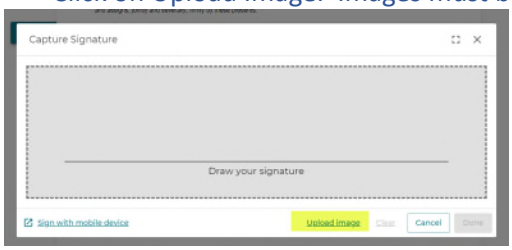


   - Enter agent's name exactly as it's listed on the POA by filling in First Name (add middle initial, if necessary) and Last Name (add Jr., Sr., II, III, etc., if necessary)
   - Enter their e-mail address
   - Click on Next
   - Click on Reassign
   - Click on OK
4. Fill in all required text tags.
   - Bond No.
   - Name of insurance company
   - Date
   - Surety
   - Your typed name plus "Attorney-in-Fact"
   - Commission Received by (if applicable)
   - On Warranty Bonds, enter the state in which the insurance company is incorporated
5. The above information can be entered once in the Performance Bond, copied, and pasted into the text fields of the Lien Bond, Endorsement, and, when applicable, the Warranty Bond(s).
6. Sign each bond by clicking on the "Sign" field next to "By" on each bond.

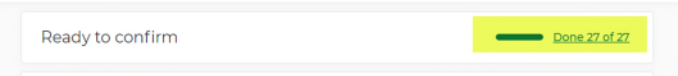
7. Apply seal using the "Sign" field to the left of the signature blocks on each bond.

   - When you click on Sign, a Capture Signature box will open.

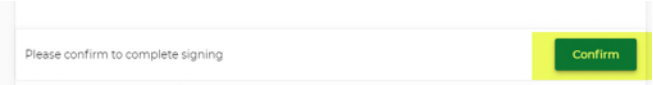
- Click on Upload Image. Images must be .jpg or .png and less than 1MB.



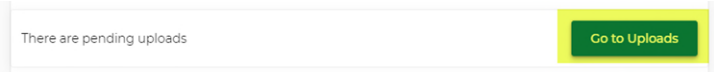
8. Navigate to your seal to apply it.
9. OneSpan keeps track of the required amount of text/signature/capture fields. Verify that all requirements are completed.



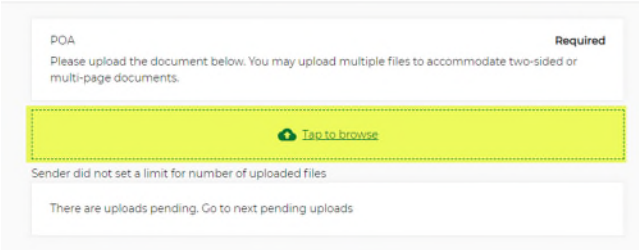
10. Click on Confirm at the bottom of the page.



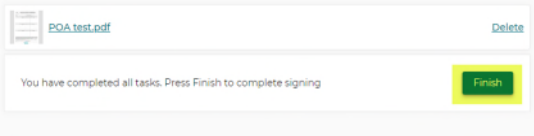
11. Upload a Power-of-Attorney. OneSpan does not allow you to insert a document into the current transaction so POAs must be treated as an "attachment."
    - Since the POAs will be a separate document from the bonds, it's important that the contract ID be in the title. For example: 77001-200107 POA.
    - If your POA is more than one page, combine pages so it is attached as one multi-page document.
    - Seals must be digitally applied to the POA before you attach it.
    - ***Be sure to date the POA before you attach it***.
12. Click on "Go to Uploads"



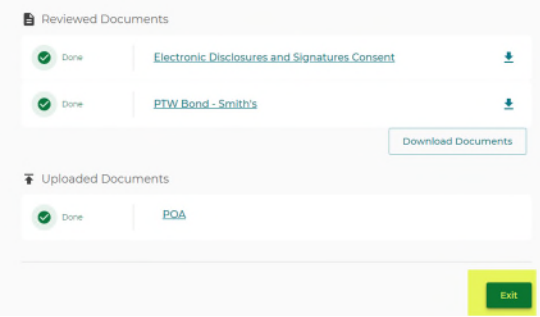
13. Click on "Tap to browse"



14. Navigate to your POA to attach it.
15. Click on Finish.



At this point, you may download the signed (by you) bonds if you wish. Click on Exit.



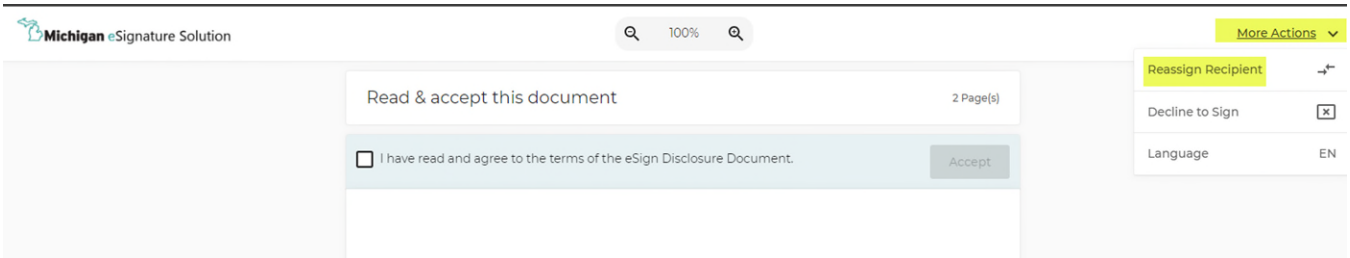
The prime contractor will then receive two e-mails from “State of Michigan eSignature” informing them that they have been added as a signer and also informing them that an attachment (the POA) has been uploaded to the transaction.

PRIME CONTRACTOR INSTRUCTIONS – Part Two

1. If you were the initiator of the transaction, but are not signing the bonds, you will receive an e-mail from "State of Michigan eSignature" stating you have been added as a reviewer. From that e-mail, the "GO TO DOCUMENTS" link will allow you to review the bonds signed by your surety agent. Click on "Finished" when review is complete.

   If you are the authorized signer, from the "added as a signer" e-mail, click on the "GO TO DOCUMENTS" link to open the bonds in OneSpan.

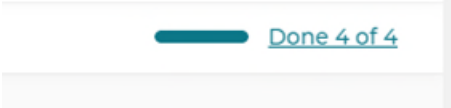
2. If you want to re-assign this document to another authorized signer, click on More Actions in the upper right



   - Enter authorized signer's name exactly as it's listed in the prequalification application by filling in First Name (add middle initial, if necessary) and Last Name (add Jr., Sr., II, III, etc., if necessary)
   - Enter their e-mail address
   - Click on Next
   - Click on Reassign
   - Click on OK

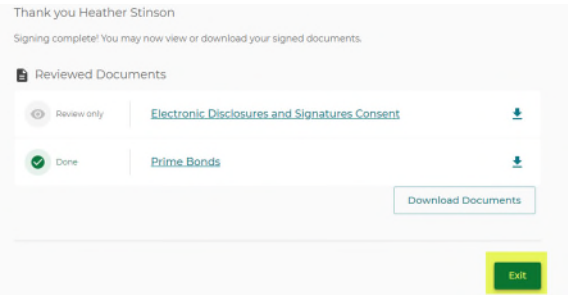
3. Click on each "Sign" field to sign the bonds.

4. Once you have signed each bond, verify your required number of tasks are completed in the upper right-hand corner.

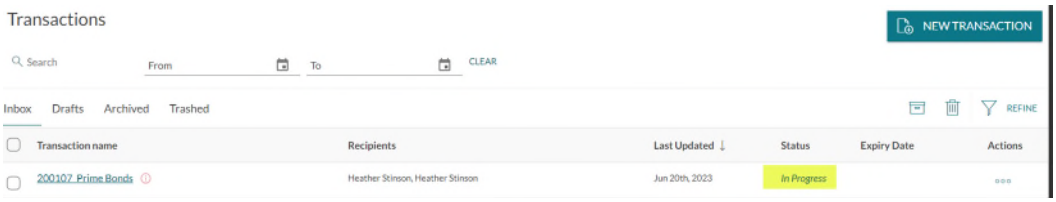


5. Click on Confirm at the bottom of the page to complete signing.

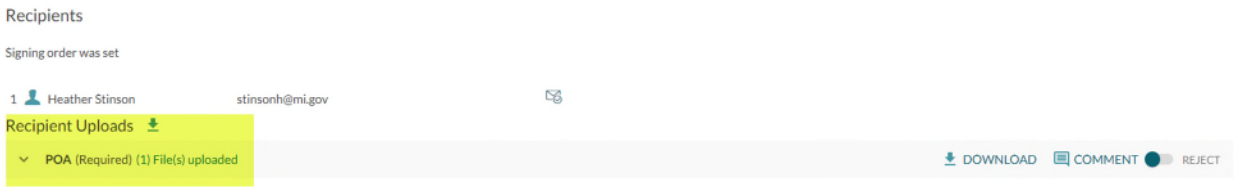
6. Click on Exit.



7. In OneSpan, go to your Dashboard. Click on the transaction you just completed. The Status will be "*In Progress*."



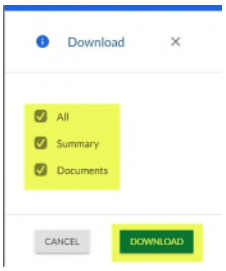
8. Ensure there is a POA listed under Recipient Uploads.



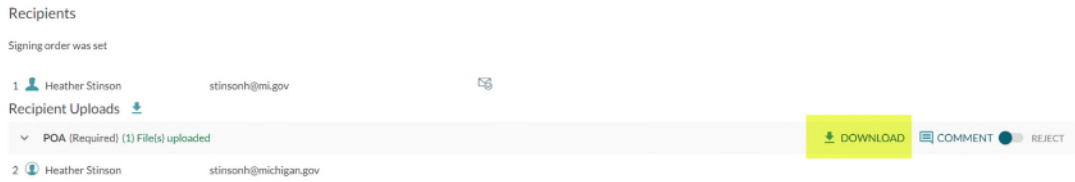
9. Click on "Complete"

10. Confirm by clicking on YES.
11. Click on Download.

12. Leave all checked and click on DOWNLOAD.



13. Save the package.zip file to your computer.
14. In OneSpan, click on DOWNLOAD next to POA.



15. Save the POA to your computer.
16. Extract the Electronic Disclosures and Signatures Consent, evidence-summary, and Prime Bonds PDF documents and save to your computer.
17. Upload the three documents from the package.zip file (Electronic Disclosures and Signatures Consent, evidence-summary, and Prime Bonds) **AND the POA** to the Awards folder under the proper job number in ProjectWise.
18. The following steps are not changing from the current process:
    - Change the state of ONLY the Prime Bonds and POA to "Next." An e-mail for each document ***may*** be auto-generated already addressed to MDOT-ProjectWiseConst@Michigan.gov and MDOT-Awards@Michigan.gov. There is no need to alter the text in the e-mail, please send ONLY ONE as is.
        - Send ONE of the two e-mails that is auto generated and close out of the other e-mail. There is no need to send both e-mails.
        - ***DO NOT CHANGE THE STATE OF THE ELECTRONIC DISCLOSURES AND SIGNATURES CONCENT OR THE EVIDENCE-SUMMARY DOCUMENTS***
    - If an e-mail is ***not*** auto-generated, manually send an e-mail to MDOT-Awards@Michigan.gov stating the bonds and POA are completed and ready for MDOT review. Be sure to include the Contract ID in your e-mail.

PRIME CONTRACTOR INSTRUCTIONS – Part One

This document preparation can be done by any employee of the prime contractor.

Download Contract Package.pdf from ProjectWise when you receive your e-mail notification that it's there.

Split the Contract Package into the following separate documents by extracting these pages and **saving as the contract ID followed by "Contract," Prime Bonds," etc. For example – 25000-123456 Contract.pdf. Documents may be rejected if the naming convention is not followed.**

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We understand asking the contractor to separate the contract is not ideal and MDOT will be pursuing a change to our internal system that will automatically split the documents upon creation.

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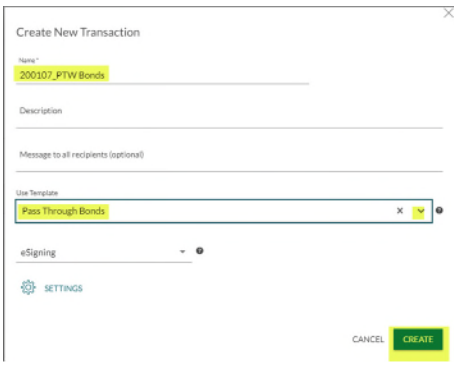
- Prime Bonds
  - Bonds Cover Page
  - Performance Bond
  - Lien Bond
  - Endorsement
  - Warranty Bond(s), if applicable (meaning prime holds a warranty)
  - Save as *Contract ID Prime Bonds*.pdf (example: 83000-654321.Prime Bonds)
- PTW Contract (separate document for each PTW)
  - Save as *Contract ID PTW Contract*.pdf. If more than one PTW, save as *Contract ID PTW Contract 1*.pdf, *Contract ID PTW Contract2*.pdf, etc. (example: 83000-654321 PTW Contract1.pdf)
  - ***E-mail the PTW Contract(s), unsigned, to MDOT-Awards@Michigan.gov (the signatures for the PTW contract will be initiated by MDOT-Awards once the contract is ready to be awarded, after all other documents and approvals are received.)***
- PTW Bond (separate document for each PTW)
  - Save as *Contract ID PTW Bond*.pdf. If more than one PTW, save as *Contract ID PTW Bond1*.pdf, *Contract ID PTW Bond2*.pdf, etc. (example: 83000-654321 PTW Bond1.pdf)
  - ***E-mail the PTW Bond(s) to your pass-through warranty subcontractor.***

PASS-THROUGH WARRANTY SUBCONTRACTOR INSTRUCTIONS – Part One

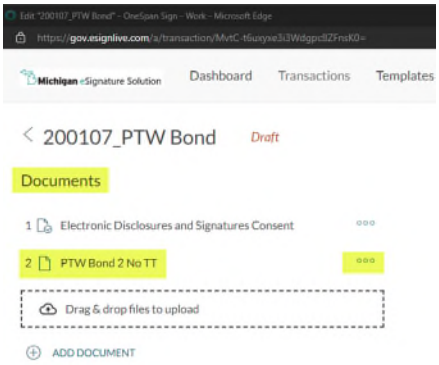
Save the PTW Bond document you received from the prime contractor to your computer.

To prepare the PTW Bond document for your surety agent, from MiLogin for Third party, an employee with a sender account must:

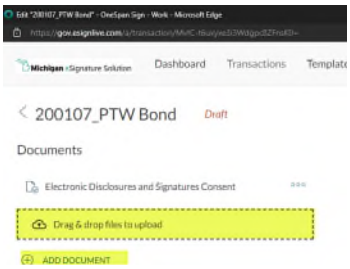
1. Click on Enterprise eSignature Sender
2. Acknowledge/Agree
3. Click on New Transaction
4. Enter Transaction Name as *Contract ID* PTW Bonds
   - Example: 83000-123456 PTW Bond.pdf
5. In Use Template field, select "Pass Through Bonds"
6. Click on Create



7. Under Documents, click on the three dots next to "PTW Bond 2 No TT" and chose Remove. ***<u>If this step is not completed, the incorrect document will be sent to your surety agent, and they will not be able to sign.</u>***



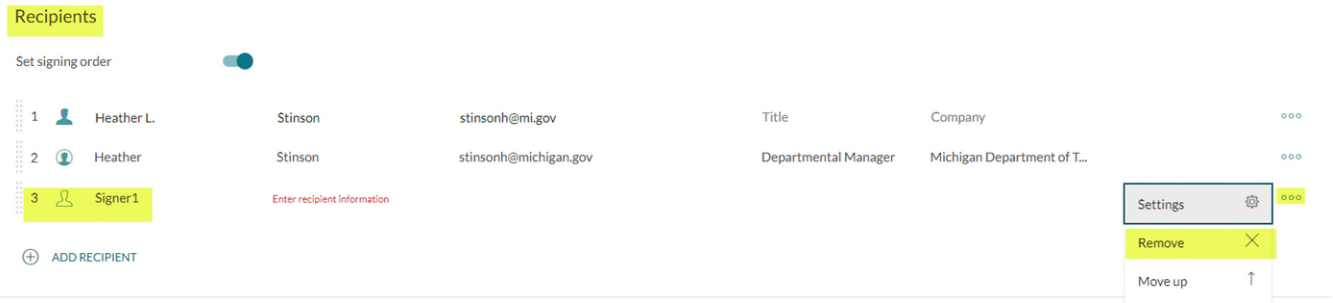
8. Confirm that you want to delete it.
9. Drag your Pass-Through Warranty Bond document and drop in Michigan eSignature Solution "Drag & drop files to upload" box or click on the plus symbol next to "ADD DOCUMENT" and navigate to select the document.



10. Under “Recipients,” click on the silhouette next to “SUB_SURETY.” As the initiator, your name will appear as the number 2 recipient.

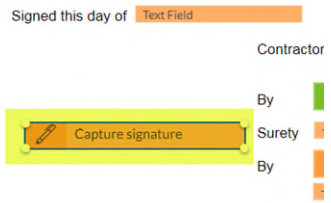
11. Choose “Recipient”
    - **Enter the EXACT name of your surety agent, and their E-mail address *(resource e-mail addresses are accepted).* If your surety agent uses a middle initial, enter it in the “First Name” box. If they use Jr., Sr., II, III, etc., enter that in the “Last Name” box.**
        - ***IT IS VERY IMPORTANT THAT THE NAME ENTERED EXACTLY MATCHES THE NAME OF YOUR SURETY AGENT ON THE SURETY’S POA. If the name does not match, your bonds will be rejected, and you will have to start a new transaction.***

12. **a. If you, as the initiator, will be signing the PTW bonds** as an authorized signer, you MUST delete the number 3 “Signer1.” Click on the three dots on the right and choose Remove.

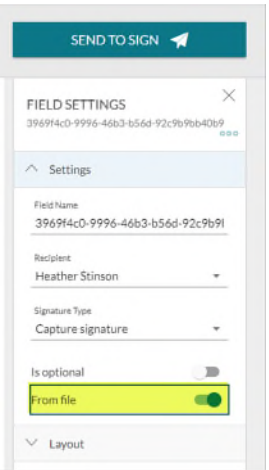


b. If you, as the initiator, are preparing the PTW bonds but will *not* be signing them, click on the silhouette next to the number 3 Signer1 and choose Recipient. Enter the EXACT name of the authorized signer who will be signing the bonds for your company. If your authorized signer uses a middle initial, enter it in the “First Name” box. If they use Jr., Sr., II, III, etc., enter that in the “Last Name” box.
    - ***IT IS VERY IMPORTANT THAT THE NAME ENTERED EXACTLY MATCHES THE NAME OF YOUR AUTHORIZED SIGNER IN YOUR COMPANY’S PREQUALIFICATION APPLICATION. If the name does not match, your bonds will be rejected and you will have to start a new transaction.***

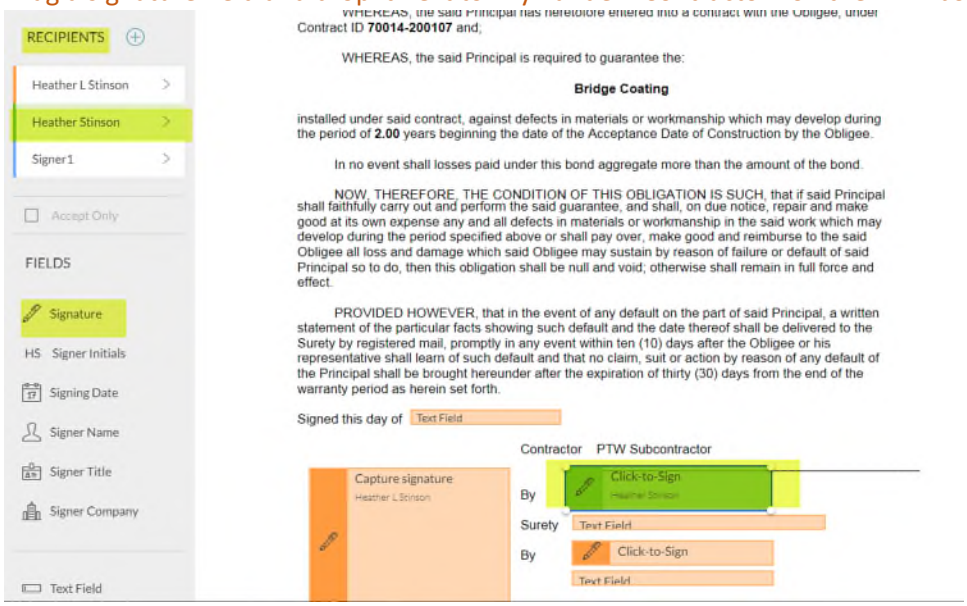
13. Click on NEXT >
14. Click on the Capture Signature field on the PTW Bond.



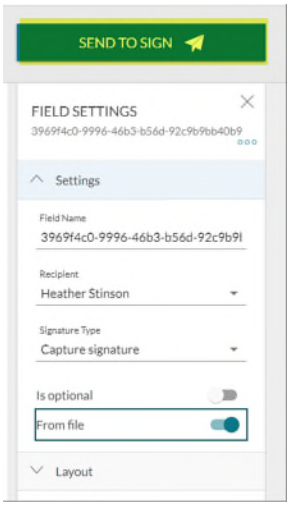
15. On the right-hand side under FIELD SETTINGS, toggle on the "From File" – **YOU MUST DO THIS FOR EACH BOND IN THE TRANSACTION. If it is not completed, the surety will decline to sign, and you'll have to start a new transaction.**



16. Add a "Signature" field for the authorized signer, whether you or someone else will be signing the PTW bond. ***<u>If this step is not completed, the authorized signer will not be able to sign the bond and you will have to start a new transaction</u>.***
    - Under RECIPIENTS, click on the authorized signer's name.
    - Under FIELDS, click on Signature
    - Drag a signature field and drop it next to "By" under "Contractor" on the PTW bond.



17. Click on SEND TO SIGN in the upper right-hand corner.

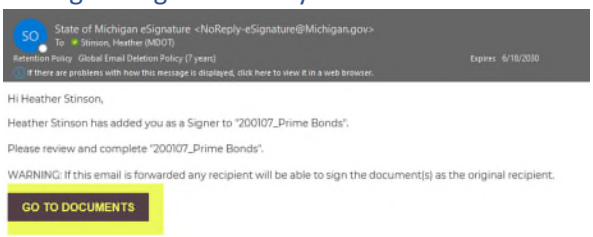


18. In the Confirm box, click on SEND or Cancel if you realize you forgot to toggle on the From File in the Capture Signature field or forgot to add the Signature Field for your authorized signer, if necessary (step 16).

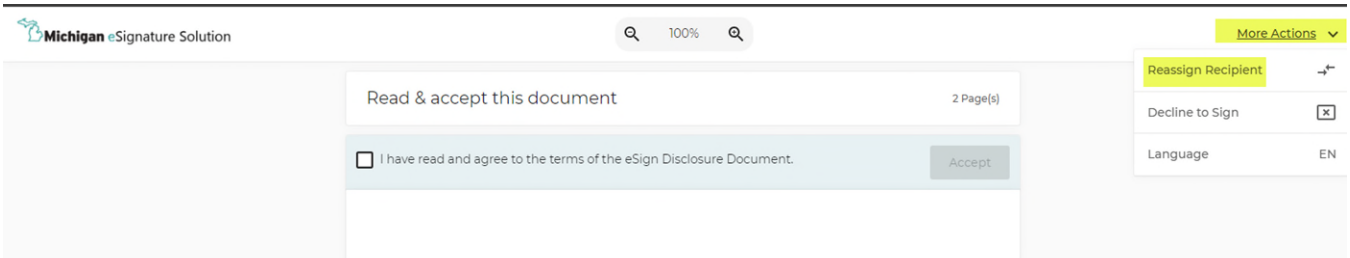
Your surety agent will receive an e-mail from “State of Michigan eSignature” informing them you have added them as a signer.

SURETY AGENT INSTRUCTIONS

1. Click on the “GO TO DOCUMENTS” link in the e-mail to open the bonds in OneSpan. Be sure to add “State of Michigan eSignature” to your trusted contacts.



2. When the Michigan eSignature Solution opens, click in the checkbox and click on Accept.
3. If you want to re-assign this document to another agent, click on More Actions in the upper right.

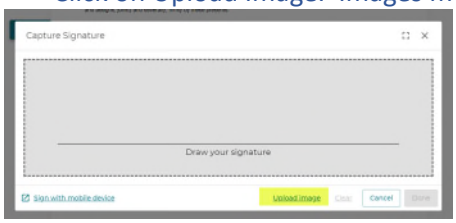


   - Enter agent’s name exactly as it’s listed on the POA by filling in First Name (add middle initial, if necessary) and Last Name (add Jr., Sr., II, III, etc., if necessary)
   - Enter their e-mail address
   - Click on Next
   - Click on Reassign
   - Click on OK
4. Fill in all required text tags.
   - Bond No.
   - Name of insurance company
   - State in which the insurance company is incorporated
   - Date
   - Surety
   - Your typed name plus “Attorney-in-Fact”
5. Sign the bond by clicking on the “Sign” field next to “By”.

6. Apply seal using the “Sign” field to the left of the signature blocks.

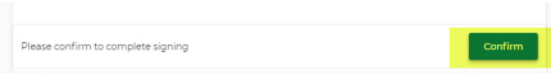
   - When you click on Sign, a Capture Signature box will open.

- Click on Upload Image. Images must be .jpg or .png and less than 1MB.

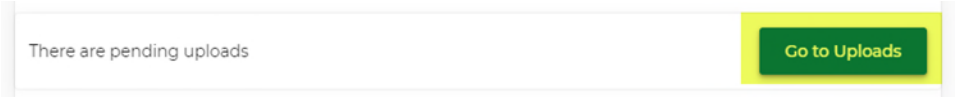


7. Navigate to your seal to apply it.
8. OneSpan keeps track of the required number of text/signature/capture fields. Verify that all requirements are completed.

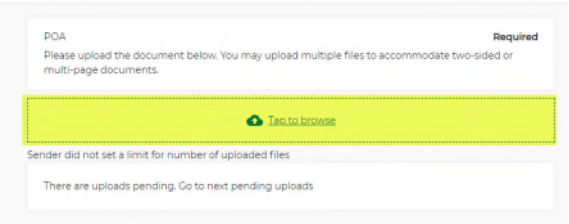
9. Click on Confirm at the bottom of the page.



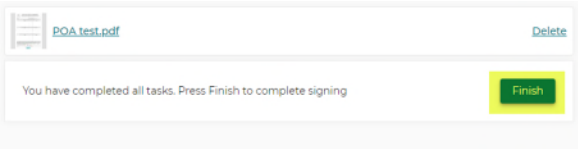
10. Upload a Power-of-Attorney. OneSpan does not allow you to insert a document into the current transaction so POAs must be treated as an "attachment."
    - Since the POAs will be a separate document from the bonds, it's important that the contract ID be in the title. For example: 77001-200107 POA.
    - If your POA is more than one page, combine pages so it is attached as one multi-page document.
    - Seals must be digitally applied to the POA before you attach it.
    - ***Be sure to date the POA before you attach it***.
11. Click on "Go to Uploads"



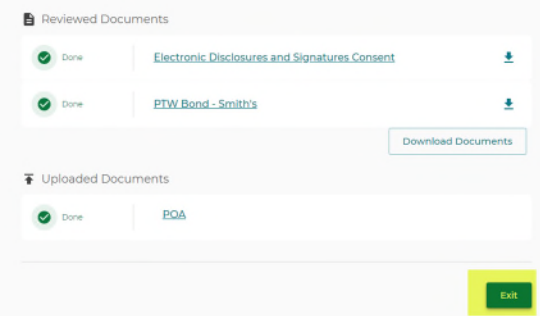
12. Click on "Tap to browse"



13. Navigate to your POA to attach it.
14. Click on Finish



At this point, you may download the signed (by you) bonds if you wish. Click on Exit.

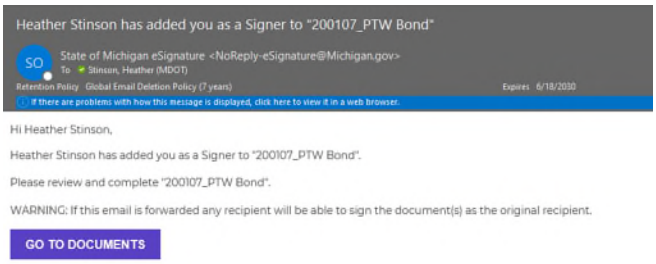


The subcontractor will then receive two e-mails from “State of Michigan eSignature” informing them that they have been added as a signer and also informing them that an attachment (the POA) has been uploaded to the transaction.

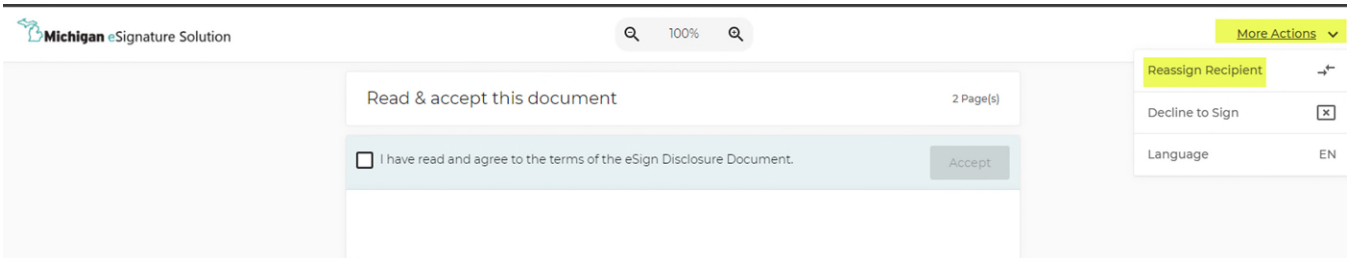
PASS-THROUGH WARRANTY SUBCONTRACTOR INSTRUCTIONS – Part Two

1. If you were the initiator of the transaction, but are not signing the PTW bond, you will receive an e-mail from "State of Michigan eSignature" stating you have been added as a reviewer. From that e-mail, the "GO TO DOCUMENTS" link will allow you to review the bonds signed by your surety agent. Click on "Finished" when review is complete.

   If you are the authorized signer, from the "added as a signer" e-mail, click on the "GO TO DOCUMENTS" link to open the PTW bond in OneSpan.

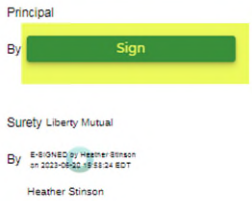


2. If you want to re-assign this document to another authorized signer, click on More Actions in the upper right

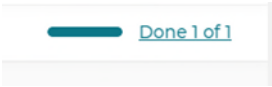


   - Enter authorized signer's name exactly as it's listed in the prequalification application by filling in First Name (add middle initial, if necessary) and Last Name (add Jr., Sr., II, III, etc., if necessary)
   - Enter their e-mail address
   - Click on Next
   - Click on Reassign
   - Click on OK

3. Click on the "Sign" field to sign the PTW bond.

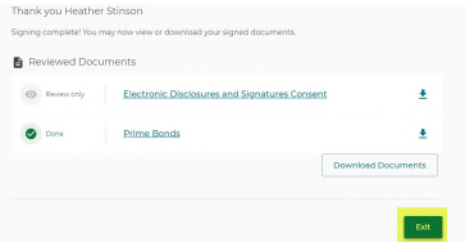


4. Verify your required number of tasks are completed in the upper right-hand corner.



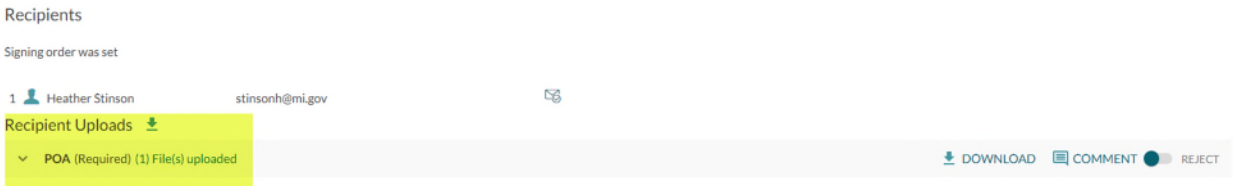
5. Click on Confirm at the bottom of the page to complete signing.

6. Click on Exit.



7. In OneSpan, go to your Dashboard. Click on the transaction you just completed. The Status will be "*In Progress*."

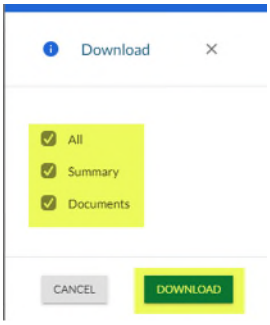
8. Ensure there is a POA listed under Recipient Uploads



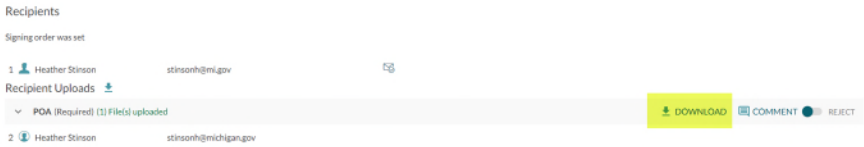
9. Click on "Complete"

10. Confirm by clicking on YES.
11. Click on Download.

12. Leave all checked and click on DOWNLOAD.



13. Save the package.zip file to your computer.
14. In OneSpan, click on DOWNLOAD next to POA.



15. Save the POA to your computer.
16. Extract the Electronic Disclosures and Signatures Consent, evidence-summary, and PTW Bond PDF documents and save to your computer.
17. Email the following documents to the prime contractor:
    - Electronic Disclosures and Signatures Consent
    - evidence-summary
    - PTW Bond
    - POA

PRIME CONTRACTOR INSTRUCTIONS – Part Two

1. From the e-mail your PTW subcontractor sends you, save the four documents listed on the previous page to your computer.
2. Upload those four documents to the Awards folder under the proper job number in ProjectWise.
3. The following steps are not changing from the current process:
   - Change the state of ONLY the PTW Bond and POA to "Next." An e-mail for each document ***may*** be auto-generated already addressed to MDOT-ProjectWiseConst@Michigan.gov and MDOT-Awards@Michigan.gov.
   - There is no need to alter the text in the e-mail, please send ONLY ONE as is.
     - Send ONE of the two e-mails that is auto generated and close out of the other e-mail. There is no need to send both e-mails.
     - ***DO NOT CHANGE THE STATE OF THE ELECTRONIC DISCLOSURES AND SIGNATURES CONCENT OR THE EVIDENCE-SUMMARY DOCUMENTS***
   - If an e-mail is ***not*** auto-generated, manually send an e-mail to MDOT-Awards@Michigan.gov stating the bonds and POA are completed and ready for MDOT review. Be sure to include the Contract ID in your e-mail.