



Lockton SCORE[®] System

Contractor quick setup guide





LOCKTON SCORE: GUIDE TO GETTING STARTED

Questions? Lockton is available to help.

If you have any questions regarding the SCORE system, from completing your profile, sharing your information with select general contractors, or any technical issues, please contact us directly at:



scoresystem@lockton.com



816.960.9515

For qualification requirements for a specific project or general contractor, please contact the general contractor directly, as Lockton is not involved in individual contractor/supplier qualification decisions.

The Lockton SCORE system is an online contractor/supplier portal designed to collect, organize and share detailed qualification information with Lockton's general contractor clients that you are interested in working with.

Objective of SCORE

Your participation in the Lockton SCORE system does not guarantee your qualification with a general contractor, nor does it disqualify you from any work. The purpose of the system is to collect and share relevant information on each contractor's/supplier's financial strength, safety record and operational capabilities so that each general contractor can make an informed decision using their own internal requirements.

For contractors/suppliers looking to be qualified, the SCORE system provides a streamlined path to qualify for multiple general contractors through a single portal, while maintaining complete control over your information at all times.

WHAT YOU WILL NEED: DOCUMENTS TO HAVE READY

To complete your company's SCORE profile, the following information and documentation will be needed. You can always complete part of your profile and return later (or allow a colleague to complete the profile) if needed. The most critical items are listed first.

- **YOUR COMPANY'S MOST RECENT FISCAL-YEAR-END FINANCIAL STATEMENTS.** While not required, CPA-prepared statements are preferred. Your financials must include your balance sheet and income statement (profit/loss statement) and utilize accrual-based accounting methods. Tax returns and cash-basis financial statements cannot be rated.
- **WORK-IN-PROGRESS SCHEDULE TO CORRESPOND WITH FINANCIAL STATEMENTS.** This documentation is never made available to general contractors but is used to compare your capital position to the amount of work being performed.
- **EVIDENCE OF YOUR COMPANY'S REVOLVING BANK LINE, IF APPLICABLE.** A letter from your bank indicating the amount of the line extended and the expiration/renewal date, or a copy of the bank line document, is required if a line is established. Bank letter must be dated within 90 days of financial statements to be included in Credit Rating.
- **EVIDENCE OF YOUR COMPANY'S CURRENTLY EFFECTIVE, AND LAST-EXPIRED, EXPERIENCE MODIFICATION RATE (EMR).** Acceptable evidence includes a form letter on your broker's letterhead or a copy of your NCCI rating calculation worksheet.
- **OSHA 300A SUMMARY LOGS FOR THE PAST THREE COMPLETED CALENDAR YEARS.** Please do not submit individual injury logs, just the annual 300A Summary log for the last three years. These summaries must be signed by an officer of your company, with total employee hours worked for the year included.
- **PROJECT EXPERIENCE DETAILS.** Information on at least three completed jobs and two ongoing jobs, including project description, location, scope of your work, who you are contracted with, completion date, and the name/email/phone number of a project reference.
- **GENERIC INSURANCE CERTIFICATE (ACORD 25).**
- **SURETY LETTER OF BONDING CAPACITY.** A letter from your surety broker confirming who your surety company is, single-project bonding limit and aggregate program bonding limit.
- **HEALTH AND SAFETY MANUAL.**

Most of Lockton's general contractors rely on our credit and safety risk ratings, which can only be generated if all of the documents listed in the first five bullets above are uploaded. If your company cannot provide one of the above, please opt-out of that section and discuss qualification directly with the general contractor.



QUICK SETUP GUIDE TO YOUR SCORE CONTRACTOR PROFILE

The Lockton SCORE system is designed to make creating a contractor qualification profile (and keeping it updated) simple and easy. Simply follow the steps below to sign up for an account — best of all, setting up an account to connect with project partners is FREE OF CHARGE!



Sign up for a SCORE account

Navigate to scoresystem.com, and click “Sign Up” to request a new account.

If your company already has an account, you will be prompted to request access from the administrator of the existing account.

The Lockton SCORE System is the next level of consultative support for the subcontractor prequalification management process - providing general contractors, owners, developers, architects, engineers and specialty trade contractors with straightforward, analytical ratings on your key partners financial strength and safety record.

Username (Email) _____

Password _____

Remember my username [Forgot your Password?](#)



Complete your company's basic profile

Complete your company's basic demographic and operations information found in the Basic Profile section.

A green or red color indicator lets you know whether you're done or the section is missing information.

The Basic Profile information is generally publicly available and will be viewable by all contractors in SCORE.

BASIC PROFILE

- Company Overview & Location(s) ●
- Company Trade Classifications ●
- Areas of Work ●
- Affiliations ●
- Designations ●

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Submit qualifications-based documents

A complete qualification profile includes a number of submitted documents, including financial, banking, safety, insurance and surety information.

Submitted documents are reviewed by Lockton for accuracy, and many are used as part of Lockton’s proprietary credit and safety risk ratings.

A complete list of documents you will need to upload can be found on page 2.



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Provide access to desired project partners

Use the “Information Sharing” function to provide desired project partners with one of three additional viewing levels to your profile. Access to your information remains under your complete control at all times.

A further explanation of the information-sharing options can be found later in this guide.

Add Connection

Access Provided: Extended Qualification ✓

Access Requested: Limited Qualification ✓

Comment: ✓

I am looking for new project partners and came across your Qualification Profile within the Lockton SCORE System. I'm interested in additional access to your Profile so I can learn more about your company and see if there's an opportunity to work together!

Cancel Send

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Maintain an active/updated qualification profile

Each section is color-coded to help you keep track of which sections are complete and current and which need your attention.

Automatic email alerts are sent as individual sections approach expiration, helping you maintain a 100 percent complete profile to ensure that you are not overlooked for any project opportunities.



UNDERSTANDING HOW INFORMATION IS SHARED

One of the keys to Lockton’s SCORE system is the contractors’ ability to decide which companies they wish to share their qualification information with and what qualification information to share. Through a request/acceptance process, you can decide which of the following sharing access levels you want to provide to each general contractor or owner.

The chart below, and the descriptions on the following page, provides an outline of what information is shared versus what information remains protected at each of the access levels.

Contractor profile information	Basic	Limited	Extended	Comprehensive
Basic profile sections	✓	✓	✓	✓
Basic profile sections – attachments	✓	✓	✓	✓
Qualifications sections		✓	✓	✓
Nonfinancial qualifications – attachments		✓	✓	✓
Risk ratings summary		✓	✓	✓
Credit strength risk rating details			✓	✓
Safety record risk rating details			✓	✓
Submitted financial statements				✓

REQUESTING/PROVIDING ACCESS

Access to your qualification information is provided only if you manually update the sharing access level provided to a general contractor or owner or if you accept a received request. Otherwise, only your basic profile (publicly available information) will be shared.

PROVIDE ACCESS TO YOUR PROFILE

Add Connection

Access Requested: **Extended Qualification** ✓

Access Provided: **Limited Qualification** ✓

Comment: ✓

Dear ABC Construction,

We are bidding a local school project in Lubbock, TX, and identified your company as a potential qualified electrical contractor in the area through the Lockton SCORE System.

ACCEPT A SHARING REQUEST

Lockton SCORE™

Dear Evan Sizemore,

You have received a new Connection Request from **Lockton Companies, LLC!** The requested access to your Qualification Profile is outlined below:

Current Access Granted: **Basic Access**

New Access Requested: **Limited Qualification**

Dear ABC Construction,

We are bidding a local school project in Lubbock, TX, and identified your company as a potential qualified electrical contractor in the area through the Lockton SCORE System.

Click below to review the pending request and connect with **Lockton Companies, LLC.**

Thank you!
The Lockton SCORE System

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BASIC ACCESS

The BASIC sharing access level is available, by default, to all Lockton clients that utilize SCORE for their contractor qualification processes. The information shared under this setting is designed to provide the information needed for general contractors and owners to search, identify and connect with individual project partners, while limiting what is shared to entirely nonconfidential, primarily publicly available information.

LIMITED ACCESS

The LIMITED sharing access level was designed to be the most restrictive sharing setting, while still providing a wide range of information that can be used to evaluate and qualify a potential contractor partner. This level may also be used for reverse-qualification, where the general contractor or owner can display credit and safety strengths to enrolled contractors, at his or her discretion, without exposing unnecessary profile information.

EXTENDED ACCESS

The EXTENDED sharing access level is the most widely requested access level for contractor qualification. It includes responses to the fundamental questions at the BASIC and LIMITED levels, while providing the detailed breakdown of the generated credit risk and safety record ratings. For most Lockton clients utilizing SCORE, sharing their contractor profiles at the extended sharing access level may be mandatory — especially to satisfy the requirements of a contractor default insurance policy.

COMPREHENSIVE ACCESS

The COMPREHENSIVE sharing access level provides access to nearly all information submitted to SCORE during the completion of your contractor profile, including financial documentation. The only information restricted under this setting is the work-in-progress schedules provided, but only if they are submitted as a separate document from the financial statements.



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- RISK MANAGEMENT
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