



Together We Build

WESTERN PARTITIONS, INC.

Standard Operating Procedure

Subcontractor Prequalification Through Autodesk TradeTapp

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1. Required Information to Complete

Purpose

The purpose of this process is to evaluate prospective subcontractors and suppliers seeking opportunities to work with Western Partitions, Inc. (WPI). The prequalification process helps ensure WPI engages with trade partners that meet minimum standards for safety, financial stability, insurance coverage, project experience, and operational capability.

Applicability

This SOP applies to all subcontractors, suppliers, and specialty contractors completing a TradeTapp prequalification questionnaire at the request of WPI.

Required Information for Entry

1. Company license numbers
2. State/province sales tax numbers
3. State unemployment insurance numbers (if applicable)
4. Information on recently completed projects inclusive of values
5. Three supplier references (Company Name, Contact Name, Contact Information)
6. Three contractor references (Company Name, Contact Name, Contact Information)
7. Dun & Bradstreet number and rating

Required Documents for Upload

1. W-9 or country-specific tax form equivalent
2. Underrepresented Business Enterprise (UBE) certification information
3. Applicable Safety Rating Verification (EMR, WorkSafe BC Clearance Letter, WISB Clearance Certificate)
4. Historical Safety Data (3-year history)
5. Safety Program
6. Current Financial Statement (CPA-prepared preferred)
7. ESG Program (if available)
8. Published environmental targets (if available)
9. Modern slavery and human trafficking statement and/or policy (if available)
10. Business Ethics Policy (if available)
11. Banking information – Line of Credit letter from bank
12. Surety information – Letter from Surety indicating project and aggregate limits
13. Insurance Information – Current sample certificate and additional insured endorsement forms

2. Accessing TradeTapp

WPI Email Invitation

Western Partitions, Inc. has invited you to qualify Inbox x

 **Western Partitions, Inc. via TradeTapp** <no_reply@tradetapp.com> 6:22 AM (4 hours ago) ☆ 😊 ↩ ⋮
to me ▾

 **BUILDINGCONNECTED**
powered by  **TRADETAPP**

Hi ,

A quick reminder:
Public link from Western Partitions, Inc. has invited you to complete their qualification questionnaire.

Select Accept Invitation → **Accept Invitation**

If you are unable to see the button or its associated link, copy and paste the following link to the address bar of your browser: https://app.buildingconnected.com/_/risk/qual-invite/1179140

Western Partitions, Inc. looks forward to connecting with you!

Sincerely,
The BuildingConnected Qualification Team

For more information:
Contact **Western Partitions, Inc.**

Help Center:
1. [Accepting invitations](#)
2. [Submitting questionnaires](#)

Figure 1: Accept Invitation

Self Service via link on WPI Builds Website

Note: Link to [Become a WPI Subcontractor](#)

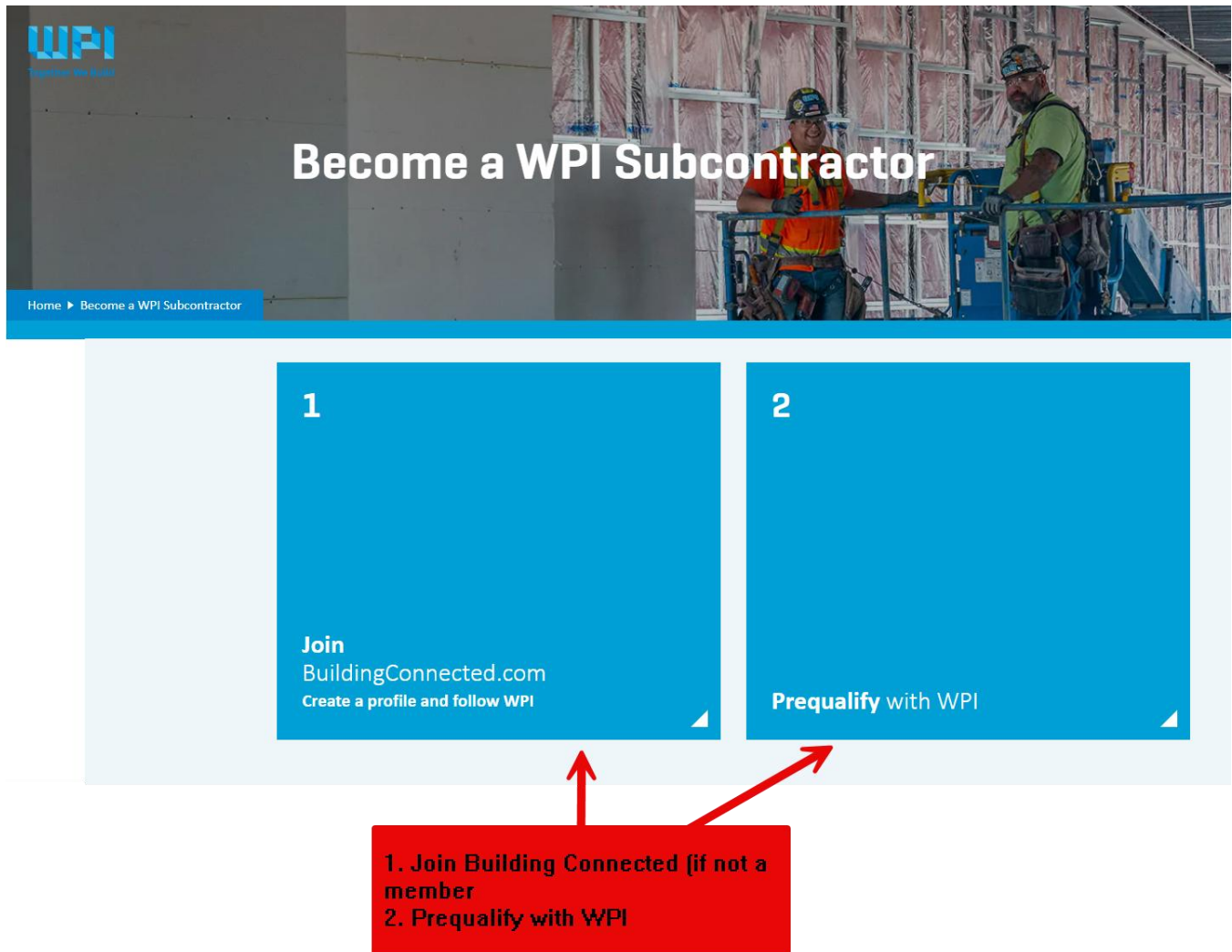


Figure 2: Self-Service Prequalification

3. Completing Questionnaire

A. General

Company Information

Provide the following information (Figure 3):

- IRS form W-9
- Company Tax Name
- Business Tax ID/EIN

1 What is your company information?

Company Name* 



Provide your current IRS form W-9 

This application requires at least 1 entry for this question.

Add New

Company Tax Name* 

This field is required

Doing Business As 

Provide us your company's business tax ID. 

Type*

Tax ID*

This field is required

Figure 3: Company Information

Currency

Provide the following information (Figure 4):

- Select your currency.



Select your currency.

Your selection will apply to all questions in this application including financial document uploads.

Currency*

USD



Figure 4: Currency

Company Address

Provide the following information (Figure 5):

- What is your company's address?

3

What is your company's address?

This application requires at least 1 entry for this question.

Main Office

Select a Main Office



Other Offices

Select other office(s)



Figure 5: Company Address

Subsidiary / Parent Company

Provide the following information (Figure 6):

- Is your company a subsidiary of, or owned by, a parent company?

4 Is your company a subsidiary or child to a parent company? [?](#)

[Click here if this does apply to your company](#)

Figure 6: Subsidiary / Parent Company

Company Founding State

Provide the following information (Figure 7):

- In what year and state/province was your company founded?

5 In what year and state/province was your company founded?

Year Founded*

State/Province Founded

Select... [v](#)

Figure 7: Company Founding State

Work Performed

Provide the following information (Figure 8):

- What type of work do you normally perform?

6 What type of work do you normally perform? [?](#)

This application requires at least 1 entry for this question.

Your trades*

Add trades using the drop-down below.

Choose a division

[v](#)

Figure 8: Work Performed

Markets Served

Provide the following information (Figure 9):

- Types of markets served

7 What markets does your company normally serve? ?

This application requires at least 1 entry for this question.

Your Markets*

Figure 9: Markets Served

Regions Served

Provide the following information (Figure 10):

- Regions the company serves

8 What regions does your company normally serve? ?

This application requires at least 1 entry for this question.

Your Regions

Figure 10: Regions Served

Office / Field Employee Count

Provide the following information (Figure 11):

- Employee Count

9 How many employees does your company have? ?

Number of Home Office Employees*

Number of Field Employees*

Figure 11: Office / Field Employee Count

Enterprise Business Certifications

Provide the following information (Figure 12):

- Enterprise Business Certification(s)

10

Does your company have any enterprise business certifications? ?

This doesn't apply to my company

Add New

Figure 12: Enterprise Business Certifications

Professional Licenses

Provide the following information (Figure 14):

- Company Professional Licenses

12

Does your company have any professional licenses? ?

This doesn't apply to my company

Add New

Figure 14: Professional Licenses

Trades Subcontracted

Provide the following information (Figure 15):

- Trades Subcontracted



Please list the trades you normally subcontract. ?

Figure 15: Trades Subcontracted

Company Website

Provide the following information (Figure 16):

- Company Website URL



What is your company website? ?

Figure 16: Company Website

B. Contacts

Company Contacts

Provide the following information (Figure 17):

- 3 Company Contacts

1

Who are your company contacts?

This application requires at least 3 entries for this question.

+ Add contacts

Name

↑

Email

Phone

0 total contacts. 3 required.

Figure 17: Company Contacts

Company Point of Contact

Provide the following information (Figure 18):

- WPI Point of Contact

Who is your point of contact at Western Partitions, Inc.?

Figure 18: Company Point of Contact

Union Affiliations

Provide the following information (Figure 13):

- Does your company have any union affiliations?

11

Does your company have any union affiliations?

This doesn't apply to my company

Add New

Figure 13: Union Affiliations

C. Projects

Project Backlog

Provide the following information (Figure 19):

- Estimated Amount of Current Backlog



What is your current estimated backlog? Please provide your backlog *only* for projects currently in progress. Do not include completed projects. [?](#)

Current estimated backlog

USD

\$

Figure 19: Project Backlog

Recently Completed Projects

Provide the following information (Figure 20):

- References for Recently Completed Projects



Provide references of **recently** completed projects. [?](#)

Please include any completed projects for the company requesting this application, if applicable.

Largest project completed in the past 5 years - None provided

Add New

Figure 20: Recently Completed Projects

Project Reference Documents

Provide the following information (Figure 21):

- Additional project reference documents



Provide any additional project reference documents. [?](#)

Document upload



Choose Files

Figure 21: Project Reference Documents

Maximum Preferred Project Size

Provide the following information (Figure 22):

- Maximum Preferred Project Size



What is your Maximum Preferred Project Size? [?](#)

USD

\$

Figure 22: Maximum Preferred Project Size

Largest Contract Value

Provide the following information (Figure 23):

- Largest contract value completed



What is the Largest Contract Value you have completed? [?](#)

USD

\$

Figure 23: Largest Contract Value

Percentage of Work Subcontracted

Provide the following information (Figure 24):

- Amount of Work Subcontracted



What Percentage of Work do you normally subcontract? [?](#)

Figure 24: Percentage of Work Subcontracted

Vendor References

Provide the following information (Figure 25):

- List of Vendor References



Provide a list of vendor references. [?](#)

[This doesn't apply to my company](#)



Choose Files

Figure 25: Vendor References

D. Safety

Most Recent EMR Scores

Provide the following information (Figure 26):

- EMR Scores



Provide your company's most recent EMR scores. [?](#)

Add New

Figure 26: Most Recent EMR Scores

OSHA Logs

Provide the following information (Figure 27):

- Provide your company's OSHA 300 results and OSHA 300A logs.



Provide your company's OSHA 300 results and OSHA 300A logs. [?](#)

Add New

Figure 27: OSHA Logs

Safety Manual

Provide the following information (Figure 28):

- Provide your company's current safety manual.



Provide us a copy of your company's current safety manual [?](#)

Add New

Figure 28: Safety Manual

Incidents / Citations in the Last 5 Years

Provide the following information (Figure 29):

- Provide a list of any serious safety incidents or citations within the last five years.



Please provide a list of any serious safety incidents/citations within the last five (5) years. [?](#)

Figure 29: Incidents / Citations in Last 5 Years

Safety Program

Provide the following information (Figure 30):

- Answer the yes/no questions.

☒	Do you have a full time safety representative? ?	Yes	No
☒	Does your company have regular safety meetings? ?	Yes	No
☒	Does your company set safety goals? ?	Yes	No
☒	Does your company provide incentives for meeting safety goals? ?	Yes	No
☒	Does your company have a return to work program? ?	Yes	No
☒	Does your company have a light duty program? ?	Yes	No
☒	Do you have an established process for incident investigation? ?	Yes	No
☒	Does your company hold new hire safety meetings? ?	Yes	No
☒	Does your company have a safety orientation program? ?	Yes	No
☒	Does your company have a drug free workplace program? ?	Yes	No
☒	Does your company have a substance abuse policy? ?	Yes	No
☒	Does your company prequalify its lower tiers and/or suppliers? ?	Yes	No

Figure 30: Safety Program

Specialty Safety Training

Provide the following information (Figure 31):

- Specialty safety training provided by the company



Please list any Specialty Safety Training that your company provides. [?](#)

Figure 31: Specialty Safety Training

Safety Meetings

Provide the following information (Figure 32):

- How often do you hold safety meetings?



How often do you hold safety meetings? [?](#)

Figure 32: Safety Meetings

E. Insurance

Insurance Program

Provide the following information (Figure 33):

- Who is the broker or agency contact for your insurance program?

1

Who is the broker or agency contact for your insurance programs? ?

Broker/Agency company name*

Contact full name*

Contact phone number*

Contact email*

Figure 33: Insurance Program

Insurance Policies

Provide the following information (Figure 34):

- What are the details of your current insurance policies?

2

What are the details of your current insurance policies? ?

This application requires input of the following coverages: General Liability, Umbrella/Excess, Professional Liability, Pollution Liability, Cyber Liability, Automobile Liability, Workers' Compensation, Cargo

Riggers (Not Applicable)

General Liability

⚠ Update Needed

🔄 Click if not applicable

✎

Umbrella/Excess

⚠ Update Needed

🔄 Click if not applicable

✎

Professional Liability

⚠ Update Needed

🔄 Click if not applicable

✎

Pollution Liability

⚠ Update Needed

🔄 Click if not applicable

✎

Cyber Liability

⚠ Update Needed

🔄 Click if not applicable

✎

Automobile Liability

⚠ Update Needed

🔄 Click if not applicable

✎

Workers' Compensation

⚠ Update Needed

🔄 Click if not applicable

✎

Cargo

⚠ Update Needed

🔄 Click if not applicable

✎

Add New

Figure 34: Insurance Policies

W
WESTERN
POWERED BY AUTODESK

WPI | Subcontractor Prequalification SOP | Autodesk TradeTapp

WPI
Together We Build

Certificates

Provide the following information (Figure 35):

- Provide a copy of your current certificate(s) of insurance.

3

Provide us a copy of your current certificate(s) of insurance.



This application requires at least 1 entry for this question.

Add New

Figure 35: Certificates

Endorsements

Provide the following information (Figure 36):

- Provide your additional insured endorsements for all applicable policies.

4

Provide us your additional insured endorsement(s) to all applicable policies ?

This application requires at least 1 entry for this question.

Add New

Figure 36: Endorsements

Surety/Bonding Program

Provide the following information (Figure 37):

- What are the details of your surety/bonding program?



What are the details of your surety/bonding program? 

Current surety company

Broker agency company name

Broker agency contact name

Broker agency contact phone

Single project bonding capacity

USD \$

Aggregate bonding capacity

USD \$

Surety letter upload



Choose Files

Figure 37: Surety/Bonding Program

Bond Amount

Provide the following information (Figure 38):

- What is the largest bond you have issued for a project?



What is the largest bond you have issued for a Project? 

USD \$

Figure 38: Bond Amount

Bond Capacity

Provide the following information (Figure 39):

- What is your current bonding capacity?



What is your current bonding capacity? 

USD

\$

Figure 39: Bond Capacity

Maximum Project Bond Capacity

Provide the following information (Figure 40):

- What is your maximum single-project bonding capacity?



What is your maximum single project bonding capacity? 

USD

\$

Figure 40: Maximum Project Bond Capacity

Maximum Aggregate Bond Capacity

Provide the following information (Figure 41):

- What is your maximum aggregate bonding capacity?



What is your maximum aggregate project bonding capacity?



USD

\$

Figure 41: Maximum Aggregate Bond Capacity

Liability Policy

Provide the following information (Figure 42):

- Answer yes or no.

10

Does your Pollution Liability Policy Cover Mold?^{*} ?

Yes

No

11

Do you have a combined policy for Professional Liability and Pollution Liability?^{*} ?

Yes

No

12

Does your policy exclude EIFS (Exterior Insulation Finishing Systems)?^{*} ?

Yes

No

Figure 42: Liability Policy

Inland Marine Coverage

Provide the following information (Figure 43):

- Please provide the amount of coverage you have available for Inland Marine, if any.

13

Please provide the amount of coverage you have available for Inland Marine, if any. ?

Required field^{*}

USD

\$

Figure 43: Inland Marine Coverage

Operations Coverage

Provide the following information (Figure 44):

- Answer yes or no.

14	Do you carry both ongoing and completed operations coverage?*	Yes	No
15	If your company able to provide an All Operation Certificate of Insurance?*	Yes	No

Figure 44: Operations Coverage

F. Financial & Compliance

IRS Form

Provide the following information (Figure 45):

- Provide your current IRS form W-9

1 Provide your current IRS form W-9 ?

This application requires at least 1 entry for this question.

Add New

Figure 45: IRS Form

Banking Information

Provide the following information (Figure 46):

- What are the details of your banking information?

✓ What are the details of your banking information? ?

Bank name

Total line of credit

USD \$

Line of credit available

USD \$

Bank contact name

Bank contact email

Bank contact phone

Figure 46: Banking Information

Historical Volume / Revenue by Year

Provide the following information (Figure 47):

- What is your company's historical volume/revenue by year?

3

What is your company's historical volume/revenue by year?



This application requires at least 1 entry for this question.

Add New

Figure 47: Historical Volume / Revenue by Year

Financial Statement

Provide the following information (Figure 48):

- Upload your most recent financial statement, including a balance sheet and income statement. CPA-audited or reviewed statements are preferred.

4

Upload your most recent financial statement including balance sheet and statement of income ("P&L"). CPA Audited or Reviewed statements are preferred. ?

This application requires at least 1 entry for this question.

Add New

Figure 48: Financial Statement

Largest Dollar Volume

Provide the following information (Figure 49):

- What is the largest dollar volume you expect to complete this year?



What is the largest dollar volume you expect to do during this year? ?

USD \$

Figure 49: Largest Dollar Volume

Average Annual Volume

Provide the following information (Figure 50):

- What was the average annual volume of work performed over the past four years?



What was the average annual volume of work performed over the past four years. ?

USD \$

Figure 50: Average Annual Volume

Bankruptcy & Legal

Provide the following information (Figure 51):

- Answer yes or no.

7	Has your Company or any of its principals ever petitioned for bankruptcy, failed in business, default or been terminated on a contract awarded to you?*	Yes	No
8	Have any of the owners, officers or major stockholders of your Company ever been indicted or convicted of any felony or other criminal conduct?*	Yes	No
9	Have any of your owners, officers, or major stockholders ever been suspended, disbarred or otherwise precluded from pursuing public work or ever been found to be non-responsive by a public agency.*	Yes	No
10	Has your Company ever had a claim made against it for improper, delayed, defective or non-compliant work or failure to meet warranty obligations?*	Yes	No
11	Is your Company or any of its owners, officers or major shareholders currently involved in any arbitration or litigation?*	Yes	No
12	Does your Company have any outstanding judgments or claims against it?*	Yes	No

Figure 51: Bankruptcy & Legal

Litigation

Provide the following information (Figure 52):

- Please list any litigation brought against your company in the past five years alleging that you failed to make payment.

13

Please list any litigation brought against your Company in the past five (5) years asserting that you failed to make payments to anyone. ?

Required field*

Figure 52: Litigation

G. Review

Review and Submit

Submit Information (Figure 53):

- Review all information and submit application

The screenshot shows the 'Review Responses and Submit' interface. On the left is a sidebar with a 'Currency in: USD' section, a 'Print Summary' button, and a progress table. The table lists sections: General (3/14), Contacts (1/2), Projects (✓), Safety (✓), Insurance (5/15), and Financial (3/13). Below the table is a 'Review' section with a 'Submit >' button. The main content area has a '< Previous' link, a 'Review Responses and Submit' red box with arrows pointing to the 'Submit' button and the review content, and a 'Review responses before submitting' heading. Below this is a note: 'Please finalize any incomplete required questions as indicated below. When complete, click **Submit**'. It also states 'All currency is in USD' and has a 'Collapse All' link. The 'General' section is expanded, showing the question 'What is your company information?' with the answer 'Bend Drywall'.

Section	Progress
General	3/14
Contacts	1/2
Projects	✓
Safety	✓
Insurance	5/15
Financial	3/13

Review

Submit >

Review Responses and Submit

Review responses before submitting

Please finalize any incomplete required questions as indicated below.

When complete, click **Submit**

All currency is in USD

[Collapse All](#)

✓ **General**

What is your company information?

What is your company name?

Bend Drywall

Figure 53: Review and Submit