



## Subcontractor Information Packet

**Thank you for your interest in becoming a Subcontractor with Price Hills HOA.**

Please fill out the attached forms and submit to:

Price Hills Homeowners Association  
PO BOX 776 Manhattan, MT 59741  
Or scan and email to [info@pricehillshoa.com](mailto:info@pricehillshoa.com)

If you have any questions, please contact the Office: 406.285.8981

### **The following documents are enclosed:**

*Forms or Documents that need returned are in noted in Brown*

- ❖ **Subcontractor Information Form**
- ❖ **Minimum Insurance Requirements**
  - **Certificate of Liability Insurance with "Price Hills Homeowners Association" as the certificate holder.**
  - **Certificate of Automotive Insurance with "Price Hills Homeowners Association" as the certificate holder.**
- ❖ **Subcontractor Rules and Conditions**
- ❖ **Subcontractor Invoice/Payment Procedures**
- ❖ **Taxpayer Identification Form W-9**
- ❖ **Worker's Compensation Insurance or exemption (ICEC).**
  - Please call the Montana Dept. of Labor and Industry at (406) 444-1446 for more information
- ❖ **State of Montana Dept. of Labor and Industry Certificate of Contractor Registration**
  - Please call the Montana Dept. of Labor and Industry at (406) 444-1446 for more information
  - State licensed Electricians and Plumbers are exempt from this requirement.
- ❖ **Business Registration**
  - Please call the Montana Dept. of Labor and Industry at (406) 444-1446 for more information
  - All persons using a business name other than their personal name are required to register.
- ❖ **Acknowledgement**

# Subcontractor Information Form

*The contents of this questionnaire will be considered confidential and used solely to determine your firm's qualifications and will not be disclosed to outside entities. Information will need to be updated annually.*

## 1. GENERAL INFORMATION | Please fill in the following:

- 1.1 Name of Business: \_\_\_\_\_  
 Street Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
 Telephone No#: \_\_\_\_\_ Fax No#: \_\_\_\_\_
- 1.2 Contact Person: \_\_\_\_\_ Title: \_\_\_\_\_  
 Telephone No#: \_\_\_\_\_ Email: \_\_\_\_\_  
 Contact Person: \_\_\_\_\_ Title: \_\_\_\_\_  
 Telephone No#: \_\_\_\_\_ Email: \_\_\_\_\_
- 1.3 Duns & Bradstreet No#: \_\_\_\_\_
- 1.4 Federal Employer Identification No#: \_\_\_\_\_

*The undersigned hereby also certifies that he/she is authorized to execute this document on behalf of the said firm and that the statements contained herein are true:*

Printed Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## 2. LICENSE INFORMATION | Please provide all trade and professional licenses, if any, required for you to perform your services:

- | 2.1 | Type of License / Name of License | State | License Number |
|-----|-----------------------------------|-------|----------------|
|     | _____                             | _____ | _____          |
|     | _____                             | _____ | _____          |
|     | _____                             | _____ | _____          |

## 3. ORGANIZATION | Please indicate your firm's legal structure:

- 3.1 This firm is a:  C Corporation  S Corporation  Partnership  
 Sole Proprietor  Limited Liability Company
- 3.2 Date Founded: \_\_\_\_\_ State Founded: \_\_\_\_\_

3.3 Corporate Officers:

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Telephone No#: \_\_\_\_\_ Email: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Telephone No#: \_\_\_\_\_ Email: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Telephone No#: \_\_\_\_\_ Email: \_\_\_\_\_

4. WORK CLASSIFICATION | Please tell us what trade (s) your company specializes in  
(*ex: Drywall, Electrical, Excavation, Snowplow Removal*).

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5. COMPANY REFERENCES

Project Name: \_\_\_\_\_ Contract Amount: \$ \_\_\_\_\_

General Contractor: \_\_\_\_\_ Phone: \_\_\_\_\_

Project Name: \_\_\_\_\_ Contract Amount: \$ \_\_\_\_\_

General Contractor: \_\_\_\_\_ Phone: \_\_\_\_\_

Project Name: \_\_\_\_\_ Contract Amount: \$ \_\_\_\_\_

General Contractor: \_\_\_\_\_ Phone: \_\_\_\_\_

6. Please list any additional information that you feel will help us determine your company's qualifications and expertise:

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# Minimum Insurance Requirements

*(You must have at LEAST this much coverage, individual projects may have set their own specific requirements)*

## Liability Insurance Requirements

Certificate of Insurance showing Price Hills HOA as the certificate holder.

Each Occurrence: \$1,000,000  
Fire Damage (any one fire): \$100,000  
Medical Exp (any one person): \$5,000  
Personal and Adv Injury: \$1,000,000  
General Aggregate: \$2,000,000  
Products – Comp-Op Aggregate: \$2,000,000  
Workman's Comp (if applicable): \$1,000,000

## Automotive Insurance Requirements

Owner of any vehicle on a Price Hills HOA project must have current Automotive insurance in place that includes Bodily Injury & Property Damage Liability.

Each Occurrence: \$1,000,000

All documents shall be kept current and updated documents must be copied to Price Hills HOA prior to expiration

# Subcontractor Rules and Conditions

*(To be a subcontractor of Price Hills HOA these Rules and Guidelines must always be adhered to)*

## General Rules

1. All subcontractors shall provide completed W-9 forms, Declaration of Independent Contractor Status Form (if applicable), Certificate of Insurance, Workman's Compensation Insurance or ICEC, Business Registration (if applicable) and any other forms as required by Price Hills HOA prior to receiving any projects and/or payments. These documents shall be updated annually with Price Hills HOA prior to expiration.
2. Subcontractors shall, at their own expense and at all times during the performance of services maintain General Liability Insurance, Workers Compensation Insurance and Automotive Liability Insurance as listed on the Price Hills HOA Minimum Insurance Form. These documents shall be updated annually with Price Hills HOA prior to expiration.
3. All subcontractors must employ an adequate work force to ensure that all work contracted for is started, performed, and completed on or ahead of schedule.
4. Problems of any kind that could result in a slow-down of job progress shall be reported to Price Hills HOA immediately.

5. Subcontractors shall comply with all applicable laws as required by the State of Montana, OSHA and Price Hills HOA safety policy.
6. Subcontractor shall provide O & M Documents and Warranty documents for all projects performed for Price Hills HOA as designated by Price Hills HOA.
7. Subcontractor shall furnish all tools, machinery, and labor to fully complete the work contracted to perform.
8. Subcontractors shall not share any project information including pricing and/or scope of work with anyone for any reason unless approved by Price Hills HOA. If asked, you are required to have them contact Price Hills HOA for any information.
9. Subcontractors shall not solicit jobs from a Price Hills HOA client/property or while on a Price Hills HOA project except for Price Hills HOA.
10. The Subcontractors represents and warrants that their employees and personnel associated shall comply with federal, state, and local laws requiring any required licenses, permits, and certificates necessary to perform the Services under this Agreement.

### **Job Site Rules**

In keeping with Price Hills HOA's intention to provide a safe working environment for employees, agents, subcontractors and material and equipment suppliers, Price Hills HOA enforces the following set of rules and conditions, concerning safety, health, cleanliness, security, and organization.

1. Smoking is not permitted in any building, enclosed space, or within 100 feet of any work area on all Price Hills HOA job sites. All debris associated with smoking must be disposed of immediately and properly.
2. All persons shall be treated with respect at all times. There shall be no whistling, cat-calling, or any demeaning act at any time.
3. All job site debris and materials shall be picked up and/or disposed of daily. Any dumpsters or trash cans that are not related to the designated Price Hills HOA project shall not be used at any time unless authorized directly by the Price Hills HOA Project Manager.
4. All phone calls by the subcontractor and its personnel shall be kept to a minimum as to not distract from safety awareness and/or job performance.
5. Subcontractor personnel work schedules including start and finish times will be provided by Price Hills HOA on each project and shall be adhered to at all times unless approved by Price Hills HOA.
6. All staging and storage of materials and tools are to take place in assigned areas only as provided by Price Hills HOA.
7. Subcontractor and its personnel are not allowed to bring his/her friends or family members on any Price Hills HOA job sites without authorization.

8. Use of homeowner facilities including bathrooms and sinks are not to be used at any time.

## **Safety Rules**

1. Alcohol and Illegal drugs are prohibited on all Price Hills HOA jobsites. Anyone found to possess, sell, or use alcohol/drugs or any other controlled substance at any Price Hills HOA job site will be subject to immediate removal from the job site and the subcontractor could be terminated. It is the responsibility of the subcontractor to enforce this policy while on any Price Hills HOA job site and reporting the same to Price Hills HOA
2. Subcontractor and its personnel shall dress in an appropriate manner and as required by OSHA, Price Hills HOA, and project Owner.
3. Subcontractor shall observe and follow all OSHA rules and guidelines. It is the responsibility of the subcontractor to be knowledgeable of all current OSHA rules and guidelines. It is also the responsibility of the subcontractor to enforce this policy with its personnel while on any Price Hills HOA job and provide all necessary safety equipment. Subcontractor could be terminated from the project for violating OSHA rules and guidelines. Specific projects may have additional rules or forms specific to that project. If so, it will be a requirement of the subcontractor to read and sign those documents.
4. The subcontractor shall ensure that applicable personnel have received the necessary training on hazards relevant to the contracted project including but not limited to: OSHA rules, EPA's Lead Renovation, Repair and Painting rules, fall protection, confined space entry, fire extinguisher usage, emergency actions plan, ladder safety and proper usage, electrical safety, heat illness prevention and first aid.
5. The subcontractor is responsible for all expenses related to providing the Services under this Agreement. This includes, but is not limited to, supplies, equipment, operating costs, business costs, employment costs, taxes, Social Security contributions / payments, disability insurance, unemployment taxes, and any other cost that may or may not be in connection with the Services provided Contractor.

## **Subcontractor Invoice/Payment Procedures**

Below you will find the requirements for submitting invoices and receiving payments. These procedures must be followed for any invoice to be considered a valid invoice. If these procedures are not adhered to on each invoice, the affected invoice(s) will be cancelled until it is submitted correctly.

### **Invoice Submitting Procedures**

1. All Subcontractors submitting invoices for payment will be required to submit them only after the work is completed unless other arraignments have been agreed upon.
2. Submit invoices for the agreed upon amount(s) only and per labor pricing agreement.
3. All invoices MUST include the property name, lot number (is applicable), detailed work completed, Subcontractor's name, address, phone number, date and amount being billed. Any invoice that does not include this will be considered an invalid and will not be paid.

4. All invoices MUST be per project. DO NOT combine projects together on one invoice.
5. Construction Lien Waivers will be required with every invoice for all work completed as required by Property/Owner.
6. Invoices MUST include ALL receipts for materials purchased.

### Payment Procedures

1. Subcontractor shall submit invoices to Price Hills HOA. Invoices submitted by the 5th day of each month will be paid on the 20th day of the same month. Invoices submitted by the 20th day of each month will be paid in the following month on the 5th day.
  - a. Invoices will only be accepted by Price Hills HOA with a signed Construction Lien Waiver. Otherwise, they will be rejected, and the subcontractor will not be paid until one is submitted.
2. Please email invoices to [info@pricehillshoa.com](mailto:info@pricehillshoa.com)
3. Invoice payments will be mailed USPS on the 5<sup>th</sup> and the 20<sup>th</sup> unless prior arrangements are made.

### ACKNOWLEDGEMENT

I have read and understand all rules and conditions listed within this document and agree to follow all said rules.

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Company Name: \_\_\_\_\_ Title: \_\_\_\_\_