



Lockton SCORE® System

Contractor User Guide



L O C K T O N C O M P A N I E S



PO Box 690960
Tulsa, OK 74169.0960
918.234.7675
withrossgroup.com

MEMO

Attn: Contractor Partners

We all understand that a successful construction project is the result of all project participants working together towards a common goal. We believe that bringing together the strongest possible project partners--measured by capability, safety practices, and financial strength--is the best way to ensure success and profitability for the team.

With this goal in mind, Ross Group will be implementing a new contractor qualification initiative, effective immediately. We have engaged Lockton, our risk management partner, to help us realize this goal through the use of their contractor qualification platform, SCORE.

The SCORE System is provided at no cost to you, and it includes these additional features, intended at making this process beneficial to you:

- **Recognizes the sensitivity of your information**
Information submitted is only viewable by Ross Group if you elect to provide it to us using SCORE's 3 qualification security settings
- **Provides additional partnership and project opportunities**
Hundreds of other general contractors use SCORE contractor data to identify and connect with potential contractors based on the work area and trades you enter
- **Reduces your qualification burden**
A single, comprehensive SCORE qualification profile can be used to qualify your company with hundreds of general contractors

We look forward to continuing our great relationship, and appreciate your assistance as we begin this new endeavor. If you have any questions regarding our qualification procedures or the SCORE System, please contact Project Controls at 918.878.2828 or email projectcontrols@withrossgroup.com

Sincerely,

Clint Black
Ross Group
Chief Operating Officer
clint.black@withrossgroup.com

WHAT IS SCORE?

Lockton's SCORE System is an online contractor qualification platform designed to collect, manage and provide objective risk evaluations on all enrolled contractors. Unlike many other qualification systems, SCORE was designed to be equally-beneficial to the contractor being qualified, and the general contractor or owner.

Projects with successful contractor selection, driven by the Lockton SCORE System, enjoy fewer setbacks and higher returns for all involved.

ABOUT LOCKTON COMPANIES

Lockton is the world's largest privately owned independent insurance broker.

Founded in 1966 by a construction surety underwriter, Lockton has grown into one of the preeminent risk management consultants in the construction industry.

HOW DO I GET STARTED?

Simply click the Sign Up link below to claim your free contractor profile and begin qualifying with hundreds of Lockton SCORE users!

[SIGN UP](#)

The following pages will provide a high-level overview of the different sections of the SCORE System's contractor profile, allowing you to understand the information and documentation that will be required to complete your profile.



QUESTIONS? CONTACT US!

scoresystem@lockton.com

BASIC PROFILE >>> COMPANY OVERVIEW & LOCATION(S)

Containing primarily basic demographic information, the Company Overview & Location(s) section is designed to provide a high-level understanding of your company.

Your selections in this section may determine which System search results your company will be included in and which project solicitations you may receive.

 **BASIC PROFILE** | **COMPANY OVERVIEW & LOCATION(S)**



Company Information

Company Name: **Lockton Companies, LLC**
Trade Name: **Lockton**
Company Type: **Corporation**
Incorporation Date: **10/17/1990**
Incorporation State: **Missouri**
DUNS #: **79-142-6323**
Tax ID: **20-6549879**

Location Name: **KANSAS CITY - Missouri**
Address: **444 W 47TH ST STE 900**
Location Type:  **Domestic Ultimate**
Phone: **(816) 960-9000**
Fax: **(816) 960-9000**
Web Site: **www.lockton.com**

[Edit Company](#)



Drop Image Here

[Remove Image](#)



Company Location(s)

[Add Location](#)

Search:

Location Name	Location Type	DUNS #	Address	Phone		
 LOCKTON MANAGEMENT, LLC	Headquarters	96-655-6529	444 W 47TH ST STE 900 - Kansa...	(816) 960-9000		
 LOCKTON INSURANCE BROKERS INC	Branch	79-207-1581	1625 W COLONIAL PKWY - Chic...	(847) 991-8700		
 LOCKTON COMPANIES, LLC-PACIFIC SERL...	Branch	80-444-091	333 UNIVERSITY AVE STE 200 - ...	(916) 210-1801		
 LOCKTON COMPANIES, LLC - DALLAS	Headquarters	80-953-8825	2100 ROSS AVE STE 1400 - Dall...	(214) 969-6748		



NEEDED DOCUMENTATION

❖ Company logo (not required).

SHARED AT ACCESS LEVELS

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REQUIRED UPDATE(S)

Updated or confirmed every 12 months.

BASIC PROFILE >>> COMPANY TRADE CLASSIFICATIONS

In this section, contractors indicate what trades of work they are capable of performing, including their primary trade of work. This is done using both Construction Specifications Institute (CSI) and North American Industry Classification System (NAICS) descriptions.

Your selections in this section may determine which System search results your company will be included in and which project solicitations you may receive.

BASIC PROFILE | COMPANY TRADE CLASSIFICATIONS

CSI (2014)

Primary Division:
00 - Procurement and Contracting Requirements

Primary Code:
00 73 16 - Insurance Requirements

Add/Edit Selected Codes
Search:

Code	
00 62 16 - Certificate of Insurance Form	
00 62 76.16 - Consent of Surety to Reduction of Retaina...	
00 65 19.19 - Consent of Surety to Final Payment Form	

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NAICS (2012)

Primary Division:
52 - Finance and Insurance

Primary Code:
524210 - Insurance Agencies and Brokerages

Add/Edit Selected Codes
Search:

Code	
523120 - Securities Brokerage	
524298 - All Other Insurance Related Activities	
525920 - Trusts, Estates, and Agency Accounts	

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NEEDED DOCUMENTATION

❖ None

SHARED AT ACCESS LEVELS



REQUIRED UPDATE(S)

Updated or confirmed every 12 months.

In this section, contractors indicate what geographical areas they are capable and willing to perform work in. Work areas can be highlighted by selecting entire states, by providing a radius of a central location, or through a custom-tracing option.

 BASIC PROFILE | AREAS OF WORK

None

B L E C

Updated or confirmed every 12 months.

[BASIC PROFILE](#) >>> [AFFILIATIONS](#)

In this section, contractors indicate if they are affiliated with any labor unions; provide evidence of any federal, state, or local licenses they currently possess; and can provide an explanation for any business or professional license that has been suspended or revoked in the past three years.

Your union-status selection in this section may determine which System search results your company will be included in and which project solicitations you may receive.


[BASIC PROFILE](#) | [AFFILIATIONS](#)

Union Status

Affiliations

Union

✓

Add Affiliation

Search:

View File	Affiliation/Union Name	Local/Branch Identification	State
 	Laborers' International Union of NA	Local 1290 (Kansas City)	Missouri

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Licenses

☐ Not Applicable

Add License

Search:

View File	Country	State	License
	United States of America	Missouri	City of Kansas City, MO

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Licenses Suspended/Revoked

In the past three years, have you had any business or professional license suspended or revoked?. If Yes, please upload a file with explanation.

☒ Yes
 ☐ No

Upload File

✓



KCMOLicense.pdf





NEEDED DOCUMENTATION

- ❖ Proof of membership for each labor union listed (required)
- ❖ A copy of each license listed (required)
- ❖ An explanation of any revoked/suspended licenses (required—if selected)

SHARED AT ACCESS LEVELS

B L E C

REQUIRED UPDATE(S)

Updated or confirmed every 12 months.

BASIC PROFILE >>> DESIGNATIONS

In this section, contractors provide information on any special business designations that their company qualifies for—whether you are a registered small business with the US Small Business Association (SBA) or a disadvantaged large business.

Your special business designations selections may determine which System search results your company will be included in and which project solicitations you may receive.

 BASIC PROFILE | DESIGNATIONS 

● Designations

Is your company a Qualified Small Business as defined by the U.S. Small Business Administration? [\(Check Here\)](#) ☒ Yes ☐ No

Which of the following SBA designations does your company qualify under?

☒ Certified 8(a) Small Business

☒ Certified HUBZone Small Business

☐ Woman-Owned Small Business (WOSB)

☐ Veteran-Owned Small Business (VOSB)

☐ Service-Disabled Veteran-Owned Small Business (SDVOSB)

☐ Native American-Owned Small Business

☐ Minority-Owned Small Business

☐ Other Small Disadvantaged Business

Does your company meet the criteria of any of the following business designations?

☐ Woman-Owned Business Enterprise (WBE)

☐ Minority-Owned Business Enterprise (MBE)

☐ Other Disadvantaged Business Enterprise (OBE)

☐ Alaskan Native Corporation

☐ None of the Above

Upload File

 Contractor-4.Affiliations&Designations.pdf





NEEDED DOCUMENTATION

- ❖ Documentation supporting any special business designations selected (not required)

SHARED AT ACCESS LEVELS



REQUIRED UPDATE(S)

Updated or confirmed every 12 months.

QUALIFICATIONS >>> FINANCIAL INFORMATION

The objective of this section is to simply collect the information required to generate the SCORE System's Credit Strength Risk Rating, which is a surety-based credit rating derived from collected financial statements, work-in-progress statements, and bank verification. The submitted financials are shared only at the Comprehensive access level.

The Credit Strength Risk Rating is immediately viewable in the "My Lockton SCORE" section of your Profile, until the information becomes outdated.

✓ QUALIFICATIONS | FINANCIAL INFORMATION

Fiscal Year-End

May, 31

● External Accountant Information

☐ Company Does Not Employ an External Accountant

Company Name: Ernst & Young, LLP

Contact: Tom, Figures

Email: T.Figures@ey.com

Phone Number: 8165554000

Edit

● Financial Statement

☐ Decline

Please include your most recent Financial Statement

Add Financial Statement

View File	Statement ↓	Financial Statement Type ↑	Submitted ↑	Submitted By	Score	Status ↑
	11/30/2016	INTERNAL STATEMENT	1/10/2017	Evan Sizemore	4.33	Confirmed
	5/31/2016	CPA AUDIT	1/10/2017	Evan Sizemore	4.58	Confirmed

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NEEDED DOCUMENTATION

- ❖ The most recent fiscal-year-end financial statement (CPA-prepared is preferred.)
- ❖ The most current interim financial statement, if fiscal year-end was more than nine months ago
- ❖ Corresponding work-in-progress schedules for each of the above-noted statements, unless already included in the financial statements

SHARED AT ACCESS LEVELS



The submitted financial documents are viewable only at Comprehensive access level.

REQUIRED UPDATE(S)

Fiscal-year-end statement required within 120 days of fiscal year-end. Credit rating cannot be based on financial information from more than nine months prior.

QUALIFICATIONS >>> SAFETY RATING

This section collects the historical safety record information used in the Lockton SCORE Safety Record Risk Rating. This rating model compares your company's recorded safety history to the average results of other contractors of the same size, within the same industry (driven by your primary NAICS trade selected).

✓ QUALIFICATIONS | SAFETY RATING



Safety Record Requirements

EMR: Current Effective EMR and most recently expired EMR that should have an expiration date a day before the current EMR.

OSHA 300: Records should be submitted for the last 3 completed calendar years.

● Experience Modification Rate History

☐ Not Applicable

Submit your currently effective EMR, and most recently expired EMR, the section will be completed when these two EMR are submitted. If you have no EMR, select Not Applicable.

[Add EMR](#)

View File	Effective Date	Expiration Date	Status
	02/01/2016	01/31/2017	Confirmed

View File	Effective Date	Expiration Date	Status
	02/01/2015	01/31/2016	Confirmed
	02/01/2014	01/31/2015	Confirmed

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● OSHA 300 Summary Log History

☐ Not Applicable

Submit your company's OSHA Summary Logs for the last 3 completed-calendar years, the section will be completed when the 3 OSHA summary logs are submitted. If you are not required to track OSHA incidents, select Not Applicable.

[Add OSHA Summary](#)

View File	Calendar Year	TRIR	DART	Status
	2015	42.31	30.77	Confirmed
	2014	33.33	8.33	Confirmed
	2013	128.00	280.00	Confirmed

View File	Calendar Year	TRIR	DART	Status
No data available				

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NEEDED DOCUMENTATION

- ❖ Documentation of your currently effective EMR, and prior EMR, in the form of a letter from your insurance broker, or a copy of your EMR calculation worksheet
- ❖ The last three calendar year (2014–2016) OSHA 300A Summary Logs, certified by an officer of your company

SHARED AT ACCESS LEVELS



REQUIRED UPDATE(S)

EMR updates are required upon expiration of effective EMR.
OSHA updates are required February 1 of each year.

QUALIFICATIONS >>> PROJECT EXPERIENCE

This section allows you to demonstrate the sizes, types, and locations of projects that your company has completed or is currently in the process of completing. You are required to submit information on at least three historical projects and a minimum of two projects currently in progress.

✓ QUALIFICATIONS | PROJECT EXPERIENCE



● Completed Projects

Please list at least three projects your company has completed in the past three years that are representative of the work you perform.

[Add Completed Project](#)

Search:

View File	Project Name	Location	Contracted with	Contract Value	Date Completed		
	Church of the Resurrection	U.S.A., Kansas	McCown Gordon Construction	\$ 9,874,654.00	12/01/2016		
	Denver Children's Hospital	U.S.A., Colorado	JE Dunn Construction Co	\$ 11,265,456.00	03/01/2016		
	Kansas Gateway Project	U.S.A., Kansas	Clarkson Construction	\$ 14,289,654.00	10/01/2016		

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● Current Projects

Please list at least two project your company is currently working on or is preparing to begin.

[Add Current Project](#)

Search:

View File	Project Name	Location	Contracted with	Contract Value	Expected Completion		
	Garmin Headquarters Upgrade	U.S.A., Kansas	Comanche Construction	\$ 1,500,000.00	12/01/2017		
	New Cerner Headquarters	U.S.A., Missouri	JE Dunn Construction	\$ 18,654,987.00	01/01/2017		
	Valencia Place II	U.S.A., Missouri	ARCO Construction	\$ 14,231,654.00	03/01/2018		

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NEEDED DOCUMENTATION

- ❖ Pictures, testimonials, or other information related to a listed project (not required)

SHARED AT ACCESS LEVELS



REQUIRED UPDATE(S)

As frequently as required to maintain a minimum of two active, in-progress projects.

QUALIFICATIONS >>> BANKING RELATIONSHIP

This section allows you to provide a reference contact for your commercial banker, as well as provide documentation of an existing revolving line of credit that has been extended to your company (this information can also be provided on the Financial Information page but will be displayed here).

✓ QUALIFICATIONS | BANKING RELATIONSHIP



● Bank Relationship

☐ Not Applicable

Please add your Bank Relationship(s)

[Add Bank Relationship](#)

Search:

Name of Bank	Relationship Year Started	Contact	Email	Phone Number		
Bank of Prairie Village	2004	Gold, Charles	cgold@bpv.com	(913) 555-9600		

Previous 1 Next

● Revolving Line(s) of Credit

☐ Not Applicable

Please document all revolving lines of credit currently extended to your company, and provide verification of each. This section will be completed when one Revolving Line-of-Credit letter is submitted.

[Add Revolving Line](#)

Search:

View File	Name of Bank	Document Date	Expiration Date	RLOC Extended	Status
	Bank of Prairie Village	12/28/2016	06/30/2017	\$ 1,000,000.00	Confirmed
	Bank of Prairie Village	12/28/2016	09/30/2017	\$ 1,000,000.00	Confirmed
	Bank of Prairie Village	01/01/2017	01/01/2018	\$ 1,000,000.00	

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NEEDED DOCUMENTATION

- ❖ Supporting documentation for any submitted revolving bank line, which would include a letter from your banker or a copy of the bank line itself

SHARED AT ACCESS LEVELS



REQUIRED UPDATE(S)

The banking relationship must be updated or confirmed every 12 months. The revolving bank line must be updated based on the submitted and confirmed expiration date.

QUALIFICATIONS >>> INSURANCE PROGRAM

This section allows contractors to provide information regarding the insurance coverage that they consistently maintain. This qualification page will not replace the project-specific collection of certificates, and the submitted ACORD25 certificate form does not need to include any specific wording or endorsements.

✓ QUALIFICATIONS | INSURANCE PROGRAM



Insurance Broker Information

Company Name: Lockton Companies, LLC
Location: Kansas City, Missouri, United States of America

Contact Name: Chase, Johnson
Phone: (816) 960-9000
Email: cjohnson@lockton.com

Edit

Insurance Information

Add all the insurance coverages that your company have in force.

Add Coverage Limits

Date Submitted: 12/28/2016 Expiration Date: 12/31/2016



Type: General Liability	Provider: Liberty Mutual Insurance Co	Exp. Date: 07/31/2017
Single/Occurrence: \$ 1,000,000.00	Aggregate: \$ 1,000,000.00	
Type: Workers' Compensation	Provider: XL Catlin	Exp. Date:
Accident/Occurrence: \$ 500,000.00	Disease/Aggregate: \$ 500,000.00	Disease/Employee: \$ 500,000.00
Type: Auto Liability	Provider: Liberty Mutual Insurance CO	Exp. Date: 07/31/2017
Combined Single Occurrence: \$ 1,000,000.00		
Type: Umbrella Policy	Provider: Munich RE	Exp. Date: 07/31/2017
Single/Occurrence: \$ 10,000,000.00	Aggregate: \$ 10,000,000.00	

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NEEDED DOCUMENTATION

❖ A generic ACORD25 insurance certificate

SHARED AT ACCESS LEVELS



REQUIRED UPDATE(S)

A new ACORD25 form is required upon the expiration of any listed lines of coverage.

QUALIFICATIONS >>> SURETY PROGRAM

If your company maintains an active surety program, this section provides the opportunity to communicate the level of support that a surety has qualified you for and to provide a reference contact for that program. A standard bonding letter (often referred to as a "good guy" or "sunshine" letter) is required to verify the information submitted. If you do not maintain a surety relationship, simply select "No."

✓ QUALIFICATIONS | SURETY PROGRAM



● Surety Program

Does your company have an established surety relationship?

☒ Yes ☐ No

● Surety Broker Information

Company Name: Lockton Companies, LLC
Location: Kansas City, Missouri, United States of America

Contact Name: Evan, Sizemore
Phone: (816) 960-9000
Email: esizemore@lockton.com

Edit

● Bond Qualification Letter

Please include your most recent Bond Qualification Letter Information. This section will be completed when one Bond Qualification Letter is submitted.

[New Bond Qualification Letter](#)

View File	Document Date	Surety Company	Single Project Limit	Submitted By	Status
	12/01/2016	Western Surety Company	\$ 25,000,000.00	Sizemore, Evan	Confirmed

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NEEDED DOCUMENTATION

- ❖ A bonding letter from your surety company or brokerage outlining the length of the current relationship and the single project/aggregate surety program limits extended

SHARED AT ACCESS LEVELS



REQUIRED UPDATE(S)

A current surety letter must be provided every 12 months.

QUALIFICATIONS >>> SAFETY PROGRAM

This section is aimed at providing supporting information on your company's safety program, including hiring practices and drug/alcohol policies and testing. Separate from the specific data collected for the Safety Record Risk Rating, this section allows you to demonstrate the safety culture of your company today.

✓ QUALIFICATIONS | SAFETY PROGRAM

Primary Health & Safety Contact

Contact Name: Dwayne, Hartman

Title: Safety Director

Phone: (800) 555-1654

Email: dhartman@wscc.com

Edit

Health & Safety

Does your Company employ staff members solely dedicated to Health & Safety?

☒ Yes ☐ No

How many of your employees are focused solely on your company's health and safety program?

2.00

✓

Safety training and Orientation

Does your company provide mandatory safety training and orientation to all new field employees?

☒ Yes ☐ No

Drug & Alcohol-free policy

Does your company have a drug & alcohol-free policy?

☒ Yes ☐ No

How often are employees tested to monitor this program?

☒ At Hire
 ☐ After Incident
 ☐ Scheduled Intervals
 ☒ Randomly
 ☐ Other
 ☐ Never

Health & Safety manual

☐ Not Applicable

Please upload a copy of your company's health & safety manual (safety plan)

Upload File

SampleSafety&HealthPlan.pdf



NEEDED DOCUMENTATION

- ❖ A copy of your company's health and safety manual, and/or any additional safety program documentation

SHARED AT ACCESS LEVELS



REQUIRED UPDATE(S)

This information, including the submitted health and safety manual, must be confirmed or updated annually.

QUALIFICATIONS >>> REFERENCES

No additional information is submitted within this section; rather, the listed references from many of the other Qualifications sections are compiled for simple review and outreach.

✓ QUALIFICATIONS | REFERENCES



Banking Reference

Search:

Name of Bank	Relationship Year Started	Contact	Email	Phone Number
Bank of Prairie Village	2004	Gold, Charles	cgold@bpv.com	(913) 555-9600

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References for Owner

Search:

Project Name	Contracted with	Contact	Phone Number	Email
W Cheyenne Ave Resurfacing	City of North Las Vegas, NV	Carl Roadway	(800) 555-1566	croad@nlv.gov

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References for General Contractor

Search:

Project Name	Contracted with	Contact	Phone Number	Email
Church of the Resurrection	McCown Gordon Construction	Josh Smith	(913) 555-8489	JSmith@mcg.com
Denver Children's Hospital	JE Dunn Construction Co	Thomas Dunn	(816) 555-1000	td1@gmail.com
Kansas Gateway Project	Clarkson Construction	Robert C	(816) 555-9874	rclar@ccc.com
New Cerner Headquarters	JE Dunn Construction	Rick Charles	(816) 555-4000	r.charles@jedunn.com
Valencia Place II	ARCO Construction	Susan Klop	(816) 555-4700	sklop@highwoods.com

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NEEDED DOCUMENTATION

❖ None

SHARED AT ACCESS LEVELS



REQUIRED UPDATE(S)

Driven by updated requirements of other sections.

MY LOCKTON SCORE >>> RATING SUMMARY

The Rating Summary provides a high-level risk indication to the general contractors and owners that you elect to share your information with. While Lockton Risk Ratings do not directly qualify or disqualify your company, many Lockton clients rely on these ratings to drive their contractor selection processes and risk mitigation requirements.

Both Risk Ratings are trade-specific, providing for the unique attributes and challenges of each trade. Ratings with a "Q" preceding them were generated based on the information you submitted and have not yet been reviewed and verified by Lockton—this usually occurs within one business day. Upon review, the "Q" will be removed and a "Confirmed" rating will be added (unless the submitted documentation is rejected).

MY LOCKTON SCORE | RATING SUMMARY

CREDIT STRENGTH



Key Figures

Statement Date: 11/30/2016
 Statement Type: INTERNAL STATEMENT
 CPA Opinion : Qualified
 Statement Period: 6 Months
 Credit Model: Heavy Equipment
 Annualized Revenues: \$ 96,837,250.30
 Working Capital: \$ 8,888,852.02
 Tangible Equity: \$ 24,503,404.88
 Backlog(Costs): \$ 62,722,118.89

SAFETY RECORD



Key Figures

Current EMR: 0.71
 EMR Effective Date: 06/01/2016
 2015 TRIR: 8.44
 Comparable Peer Avg: 5.30
 2015 DART: 4.44
 Comparable Peer Avg: 2.90
 Est. Employees: 208

The Credit and Safety risk ratings generated by Lockton and the SCORE System are based on material obtained by Lockton directly from contractors. These materials are assumed to be factual and reliable, however, all ratings and data are provided without warranties of such. The risk ratings calculated are intended to offer an indication of a contractor's relative financial, safety, and job performance risk, and should not be construed as a recommendation or guarantee of any type by Lockton.



NEEDED DOCUMENTATION

❖ None

SHARED AT ACCESS LEVELS



REQUIRED UPDATE(S)

Driven by updated requirements of other sections.

MY LOCKTON SCORE >>> CREDIT STRENGTH RATING DETAILS

 MY LOCKTON SCORE | CREDIT STRENGTH 



NEEDED DOCUMENTATION

❖ None

SHARED AT ACCESS LEVELS

E

C

REQUIRED UPDATE(S)

Driven by updated requirements of other sections.

MY LOCKTON SCORE >>> SAFETY RECORD

The Safety Record section provides a detailed breakdown of the calculations and results of the submitted Safety Record information. The rating breakdown shows which industry model your company was rated under and provides the calculations and subratings for your submitted EMR and OSHA data.

 MY LOCKTON SCORE | SAFETY RECORD



NEEDED DOCUMENTATION

❖ None

SHARED AT ACCESS LEVELS

E

C

REQUIRED UPDATE(S)

Driven by updated requirements of other sections.

UNDERSTANDING HOW INFORMATION IS SHARED

One of the keys to Lockton's SCORE System is the contractor's 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.

Cancel Send

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**.

VIEW PROFILE CONFIRM REQUEST

Thank you!
The Lockton SCORE System

Copyright © 2017 Lockton Companies. All rights reserved.

B**»» 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.

L**»» 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 their credit and safety strengths to enrolled contractors, at their discretion, without exposing unnecessary profile information.

E**»» 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.

C**»» 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.

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

NOTES

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Our Mission

To be the worldwide value and service leader in insurance brokerage,
risk management, employee benefits, and retirement services

Our Goal

To be the best place to do business and to work



LOCKTON®

RISK MANAGEMENT | EMPLOYEE BENEFITS | RETIREMENT SERVICES

lockton.com