

Electronic File Naming Convention

Requirements

To expedite the processing of the documentation, the University of Illinois requires all vendors to follow the electronic file naming convention listed below. Only pdf format is allowed. Any documents provided to the University in a format other than pdf or without using this file naming convention will be rejected.

General Outline

[IPEC Bulletin Identifier] [UI Project Number] [Prime or Sub Identifier] [Vendor Identifier] [Document Type Identifier] [Additional Numeric Identifier if necessary].pdf

Professional Services Agreements Files

Prime PSC Documentation:

1. **Form A Certifications and Disclosures Requirements**
 - a. File name: **PSS**[University Project Number]**P**[First 5 Letters¹ of PSC's Name]**FORMA**.pdf
 - b. Example: PSSU03999PSmithFORMA.pdf
 - c. Additional identifiers may be needed:
 - i. For multiple year contracts, note the renewal year (R1, R2, or R3) as part of the filename
 - ii. Examples:
 1. PSSU03999PSmithFORMAR1.pdf
 2. PSSU03999PSmithFORMAR2.pdf
2. **Form B Certifications and Disclosures Requirements**
 - a. File name: **PSS**[University Project Number]**P**[First 5 Letters of PSC's Name]**FORMB**[Sequential Number if more than 1]
 - b. Example: PSSU03999PSmithFORMB.pdf
 - c. Additional identifiers may be needed:
 - i. For multiple year contracts, note the renewal year (R1, R2, or R3) as part of the filename.

General Notes:

- ¹ If the first five letters do not create a unique identifier for each of the vendors and subs for the project, additional letters shall be used until each vendor or sub has a unique name.
- ² Include multiple bid package (BP1, BP2, etc.) and rebids (R, R2, etc.) identifiers as a part of the project number. The full project number as a part of the file name should include these identifiers and be consistent with the project posting.
- ³ Other Professional Services Contracts may include, but not be limited to Construction Managers (CMs), Landscape Architects, Commissioning Agents, Project Managers, etc.

- ii. Examples:
 - 1. PSSU03999PSmithFORMBR1.pdf
 - 2. PSSU03999PSmithFORMBR2.pdf
- 3. State of Illinois Certification of No Change for Contract Renewal form
 - a. File Name: **PSS**[University Project Number]**P**[First 5 Letters of PSC's Name]**NC**.pdf
 - b. Example: PSSU03999PNC.pdf
 - c. Additional identifiers may be needed:
 - i. For multiple year contracts, note the renewal year (R1, R2, or R3) as part of the filename
 - ii. Examples:
 - 1. PSSU03999PSmithNCR1.pdf
 - 2. PSSU03999PSmithNCR2.pdf
- 4. Procurement Policy Board (PPB) Questions for Retainer Contract Renewal
 - a. File Name: **PSS**[University Project Number]**P**[First 5 Letters of PSC's Name]**O**.pdf
 - b. Example: PSSU03999PO.pdf
 - c. Additional identifiers may be needed:
 - i. For multiple year contracts, note the renewal year (R1, R2, or R3) as part of the file name
 - ii. Examples:
 - 1. PSSU03999PSmithOR1.pdf
 - 2. PSSU03999PSmithOR2.pdf
- 5. **CPO Financial Disclosure Affidavit**
 - a. File name: **PSS**[University Project Number]**P**[First 5 Letters of PSC's Name]**Affidavit**[Sequential Number if more than 1]
 - b. Example: PSSU03999PSmith**Affidavit**.pdf
 - c. Additional identifiers may be needed:
 - i. For multiple year contracts, note the renewal year (R1, R2, or R3) as part of the filename.
 - ii. Examples: PSSU03999PSmithAffidavitR1.pdf or PSSU03999PSmithAffidavitR2.pdf
- 6. BEP Goal Waiver Request form
 - a. File name: **PSS**[University Project Number]**P**[First 5 Letters of PSC's Name]**BEPGWR**[Sequential Number if more than 1]
 - b. Example: PSSU03999PSmithBEPGWR.pdf
 - c. Additional identifiers may be needed:
 - i. For multiple year contracts, note the renewal year (R1, R2, or R3) as part of the file name.

General Notes:

- ¹ If the first five letters do not create a unique identifier for each of the vendors and subs for the project, additional letters shall be used until each vendor or sub has a unique name.
- ² Include multiple bid package (BP1, BP2, etc.) and rebids (R, R2, etc.) identifiers as a part of the project number. The full project number as a part of the file name should include these identifiers and be consistent with the project posting.
- ³ Other Professional Services Contracts may include, but not be limited to Construction Managers (CMs), Landscape Architects, Commissioning Agents, Project Managers, etc.

- ii. Examples: PSSU03999PsmithBEPGWRR1.pdf or PSSU03999PSmithBEPGWRR2.pdf

Subconsultant PSC Documentation:

1. **Form A Certifications and Disclosures Requirements**
 - a. File name: **PSS**[University Project Number]**S**[First 5 Letters of Subconsultant's Name]**FORMA**.pdf
 - b. Example: PSSU03999SABCEnFORMA.pdf
2. **Form B Certifications and Disclosures Requirements**
 - a. File name: **PSS**[University Project Number]**S**[First 5 Letters of Subconsultant's Name]**FORMB**[Sequential Number if more than 1].pdf
 - b. Example: PSSU03999SABCEnFORMB.pdfc.Subcontract
 - i. File name: **PSS**[University Project Number]**S**[First 5 Letters of Subconsultant's Name]**S**.pdf
 - ii. Example: PSSU03999SABCEnS.pdf

Other Professional Services Contracts Files

Prime PSC Documentation:

1. **Form A Certifications and Disclosures Requirements**
 - a. File name: **RFP**[University Project Number]**P**[First 5 Letters² of PSC's Name]**FORMA**.pdf
 - b. Example: RFPU03999PKLMNoFORMA.pdf
 - c. Additional identifiers may be needed:
 - i. For multiple year contracts, note the renewal year (R1, R2, or R3) as part of the filename
 - ii. Examples:
 1. RFPU3999PKLMNoFORMAR1.pdf
 2. RFPU3999PKLMNoFORMAR2.pdf
2. **Form B Certifications and Disclosures Requirements**
 - a. File name: **RFP**[University Project Number]**P**[First 5 Letters of PSC's Name]**FORMB**[Sequential Number if more than 1]
 - b. Example: RFPU03999PKLMNoFORMB1.pdf
 - c. Additional identifiers may be needed:
 - i. For multiple year contracts, note the renewal year (R1, R2, or R3) as part of the filename

General Notes:

- ¹ If the first five letters do not create a unique identifier for each of the vendors and subs for the project, additional letters shall be used until each vendor or sub has a unique name.
- ² Include multiple bid package (BP1, BP2, etc.) and rebids (R, R2, etc.) identifiers as a part of the project number. The full project number as a part of the file name should include these identifiers and be consistent with the project posting.
- ³ Other Professional Services Contracts may include, but not be limited to Construction Managers (CMs), Landscape Architects, Commissioning Agents, Project Managers, etc.

- ii. Examples:
 - 1. RFPU3999PKLMNoFORMBR1.pdf
 - 2. RFPU3999PKLMNoFORMBR2.pdf
- 3. Contract Renewal Certification of No Change form
 - a. File Name: **RFP**[University Project Number]**P**[First 5 Letters of PSC's Name]**NC**.pdf
 - b. Example: RFPU03999PKLMNoNC.pdf
 - c. Additional identifiers may be needed:
 - i. For multiple year contracts, note the renewal year (R1, R2, or R3) as part of the filename
 - ii. Examples:
 - 1. RFPU3999PKLMNoNCR1.pdf
 - 2. RFPU3999PKLMNoNCR2.pdf
- 4. Procurement Policy Board (PPB) Questions for Retainer Contract Renewal
 - a. File Name: **RFP**[University Project Number]**P**[First 5 Letters of PSC's Name]**O**.pdf
 - b. Example: RFPU03999PO.pdf
 - c. Additional identifiers may be needed:
 - i. For multiple year contracts, note the renewal year (R1, R2, or R3) as part of the file name
 - ii. Examples:
 - 1. PSSU3999PSmithOR1.pdf
 - 2. PSSU3999PSmithOR2.pdf
- 5. **CPO Financial Disclosure Affidavit**
 - a. File name: **RFP**[University Project Number]**P**[First 5 Letters of PSC's Name]**Affidavit**[Sequential Number if more than 1]
 - b. Example: RFPU03999PKLMNoAffidavit1.pdf
 - c. Additional identifiers may be needed:
 - i. For multiple year contracts, note the renewal year (R1, R2, or R3) as part of the filename.
 - ii. Examples: RFPU3999PKLMNoAffidavitR1.pdf or RFPU3999PKLMNoAffidavitR2.pdf
- 6. BEP Goal Waiver Request form
 - a. a. File name: **RFP**[University Project Number]**P**[First 5 Letters of PSC's Name]**BEPGWR**[Sequential Number if more than 1]
 - b. b. Example: RFPU03999PSmithBEPGWR.pdf
 - c. c. Additional identifiers may be needed:

General Notes:

- ¹ If the first five letters do not create a unique identifier for each of the vendors and subs for the project, additional letters shall be used until each vendor or sub has a unique name.
- ² Include multiple bid package (BP1, BP2, etc.) and rebids (R, R2, etc.) identifiers as a part of the project number. The full project number as a part of the file name should include these identifiers and be consistent with the project posting.
- ³ Other Professional Services Contracts may include, but not be limited to Construction Managers (CMs), Landscape Architects, Commissioning Agents, Project Managers, etc.

- i. For multiple year contracts, note the renewal year (R1, R2, or R3) as part of the file name.
- ii. Examples: RFPU03999PSmithBEPGWRR1.pdf or RFPU03999PSmithBEPGWRR2.pdf

Subconsultant PSC Documentation:

1. **Form A Certifications and Disclosures Requirements**
 - a. File name: **RFP**[University Project Number]**S**[First 5 Letters of Subconsultant's Name]**FORMA**.pdf
 - b. Example: RFPU03999SPQRSoFORMA.pdf
2. **Form B Certifications and Statutory Requirements**
 - a. File name: **RFP**[University Project Number]**S**[First 5 Letters of Subconsultant's Name]**FORMB**[Sequential Number if more than 1].pdf
 - b. Example: RFPU03999SPQRSoFORMB1.pdf. Subcontract
 - i. File name: **RFP**[University Project Number]**S**[First 5 Letters of Subconsultant's Name]**S**.pdf
 - ii. Example: RFPU03999SPQRSoS.pdf

Contractor Contracts Files

Prime Contractor Documentation:

1. **Form A Certifications and Disclosures Requirements**
 - a. File name: **BA**[University Project Number]**P**[First 5 Letters of Contractor's Name]**FORMA**.pdf
 - b. Example: BAU03999PXYZcoFORMA.pdf
 - c. Additional identifiers may be needed:
 - i. For multiple year contracts, i.e., JOCs Contracts, note the renewal year (R1, R2, or R3) as part of the filename
 - ii. Examples:
 1. BAU3999PXYZcoFORMAR1.pdf
 2. BAU3999PXYZcoFORMAR2.pdf
2. **Form B Certifications and Statutory Requirements**
 - a. File name: **BA**[University Project Number]**P**[First 5 Letters of Contractor's Name]**FORMB**[Sequential Number if more than 1].pdf
 - b. Example: BAU03999PXYZcoFORMB.pdf
 - c. Additional identifiers may be needed:

General Notes:

- ¹ If the first five letters do not create a unique identifier for each of the vendors and subs for the project, additional letters shall be used until each vendor or sub has a unique name.
- ² Include multiple bid package (BP1, BP2, etc.) and rebids (R, R2, etc.) identifiers as a part of the project number. The full project number as a part of the file name should include these identifiers and be consistent with the project posting.
- ³ Other Professional Services Contracts may include, but not be limited to Construction Managers (CMs), Landscape Architects, Commissioning Agents, Project Managers, etc.

- i. For multiple year contracts, i.e., JOCs Contracts, note the renewal year (R1, R2, or R3) as part of the filename
 - ii. Examples:
 - 1. BAU03999PXYZcoFORMBR1.pdf
 - 2. BAU03999PXYZcoFORMBF2.pdf
- 3. Procurement Policy Board (PPB) Questions for Job Order Contract (JOC) Renewal
 - a. File Name: **BA**[University Project Number]**P**[First 5 Letters of PSC's Name]**O**.pdf
 - b. Example: BAU03999PO.pdf
 - c. Additional identifiers may be needed:
 - i. For multiple year contracts, note the renewal year (R1, R2, or R3) as part of the file name
 - ii. Examples:
 - 1. BAU03999PSmithOR1.pdf
 - 2. BAU03999PSmithOR2.pdf
 - 3. CPO Financial Disclosure Affidavit
 - 4. File name: **BA**[University Project Number]**S**[First 5 Letters of Subcontractor's Name]Affidavit.pdf. Example: BAU21033SRemcoAffidavit.pdf
- 4. BEP Goal Waiver Request form
 - a. File name: **BA**[University Project Number]**P**[First 5 Letters of PSC's Name]**BEPGWR**[Sequential Number if more than 1]
 - b. Example: BAU03999PSmithBEPGWR.pdf
 - c. Additional identifiers may be needed:
 - i. For multiple year contracts, note the renewal year (R1, R2, or R3) as part of the file name.
 - ii. Examples: BAU03999PsmithBEPGWRR1.pdf or BAU03999PSmithBEPGWRR2.pdf

Subcontractor Documentation:

- 2. **Form A Certifications and Disclosures Requirements**
 - a. File name: **BA**[University Project Number]**S**[First 5 Letters of Subcontractor's Name]**FORMA**.pdf
 - b. Example: BAU03999S123CoFORMA.pdf
- 3. **Form B Certifications and Statutory Requirements**
 - a. File name: **BA**[University Project Number]**S**[First 5 Letters of Subcontractor's Name]**FORMB**[Sequential Number if more than 1].pdf Example: BAU03999S123CoFORMB.pdf

General Notes:

- ¹ If the first five letters do not create a unique identifier for each of the vendors and subs for the project, additional letters shall be used until each vendor or sub has a unique name.
- ² Include multiple bid package (BP1, BP2, etc.) and rebids (R, R2, etc.) identifiers as a part of the project number. The full project number as a part of the file name should include these identifiers and be consistent with the project posting.
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b. Subcontract

- i. File name: **BA**[University Project Number]**S**[First 5 Letters of Subcontractor's Name]**S**.pdf
- ii. Example: BAU03999S123CoS.pdf

General Notes:

- ¹ *If the first five letters do not create a unique identifier for each of the vendors and subs for the project, additional letters shall be used until each vendor or sub has a unique name.*
- ² *Include multiple bid package (BP1, BP2, etc.) and rebids (R, R2, etc.) identifiers as a part of the project number. The full project number as a part of the file name should include these identifiers and be consistent with the project posting.*
- ³ *Other Professional Services Contracts may include, but not be limited to Construction Managers (CMs), Landscape Architects, Commissioning Agents, Project Managers, etc.*