

# Construction (and related) Contracts

## Risk Assessment Tools and Insurance Requirement Exhibit Templates

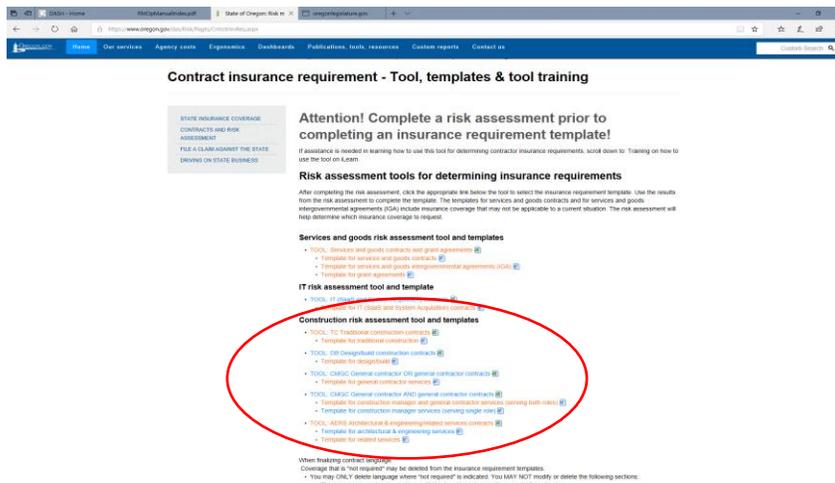
### Basic Instructions

#### Step One: Identify the template and tool.

From the DAS Risk Management webpage, select the insurance requirement template and risk assessment tool based on the contract type (Traditional Construction, Design/build, etc.).

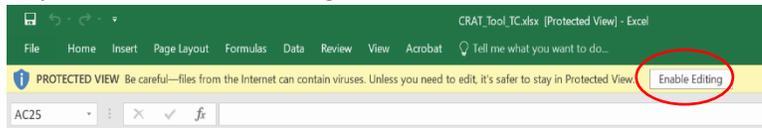
<https://www.oregon.gov/das/Risk/Pages/CntrctrInsReq.aspx>

Click the appropriate tool to open it (it may take a moment to load up).

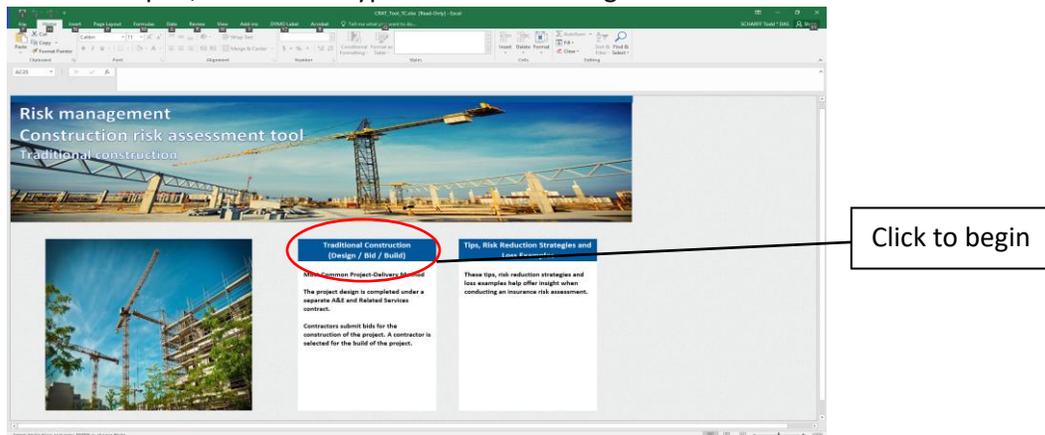


#### Step Two: Open the tool to begin the risk assessment.

If necessary, choose "Enable Editing."

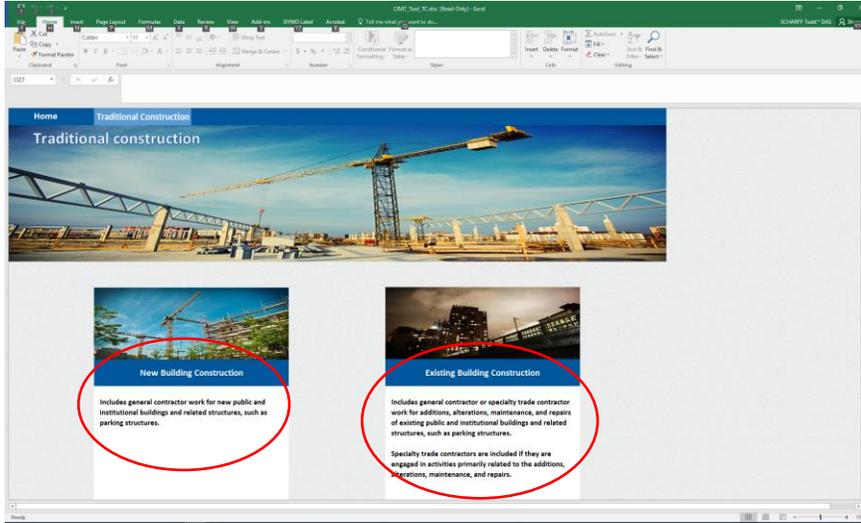


Once the tool is open, click on the type of contract to begin.



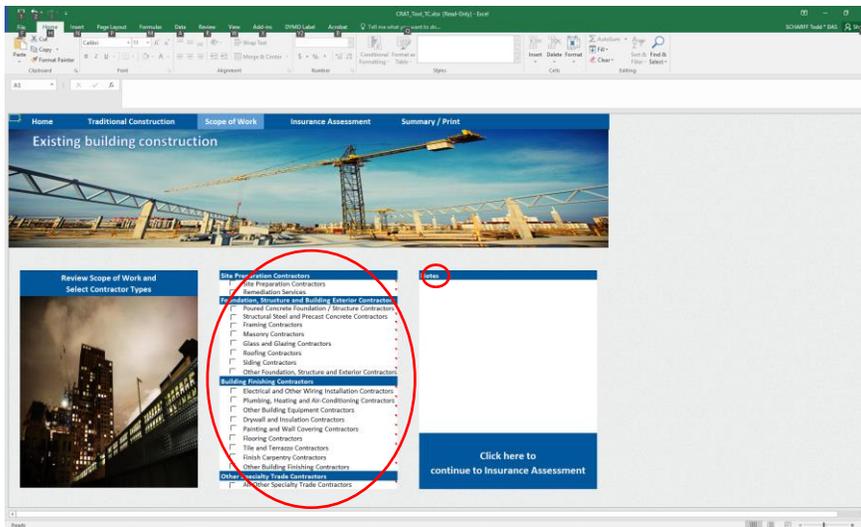
### Step Three: Select type of project.

If asked, select New Construction or Existing Building Construction. The tool provides definitions of each project type. (Note: for some contract types – such as A&E – the tool does not distinguish between new and existing construction.) After selecting type of project, the tool moves to the Scope of Work page.



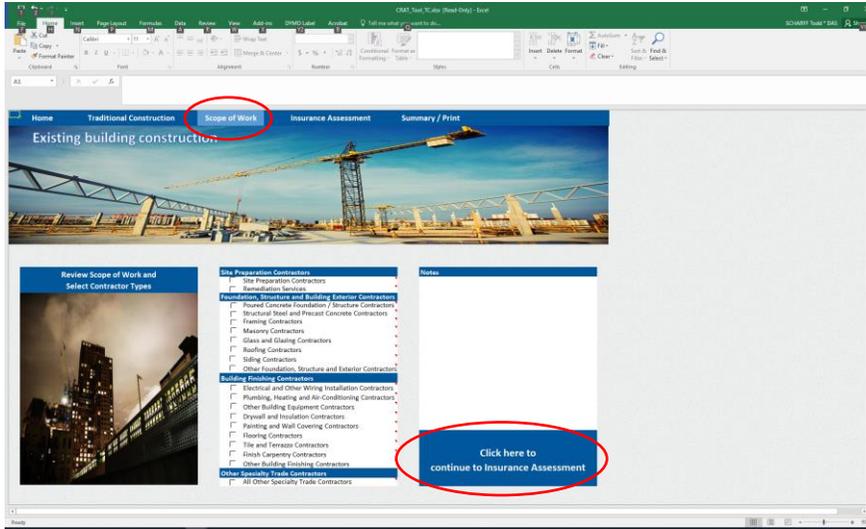
### Step Four: Scope of Work.

The center of the page provides information regarding various types of construction work. These are examples of Specialty Trade contractors (as opposed to a General Contractor). Hover over the red triangles for additional information. During the assessment, the tool may ask if the contract is for a Specialty Trade Contractor or a General Contractor. A “Notes” section is also available for entering comments regarding the contract/project.



**Step Five: Begin the assessment.**

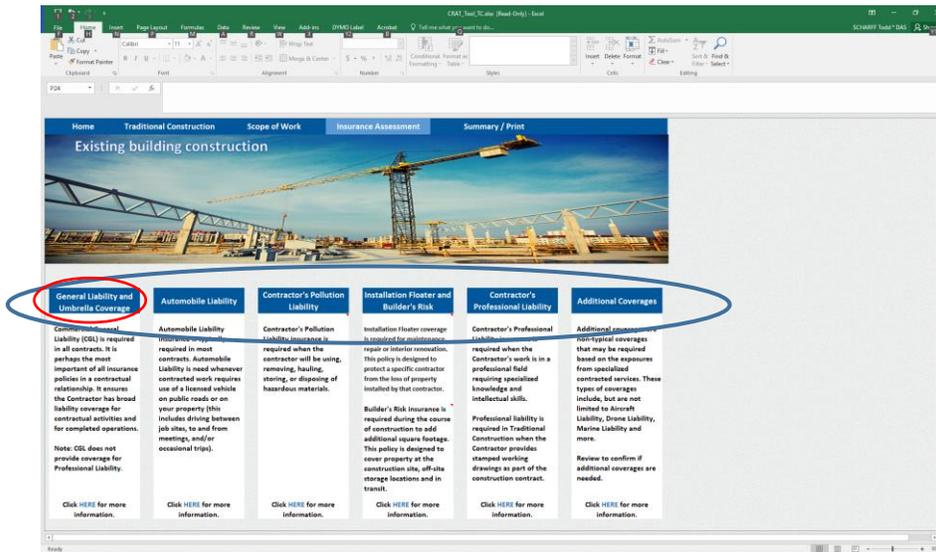
There are two spots on the Scope of Work page to click **“Insurance Assessment”** in order to move to the next page and begin assessing for insurance requirements.



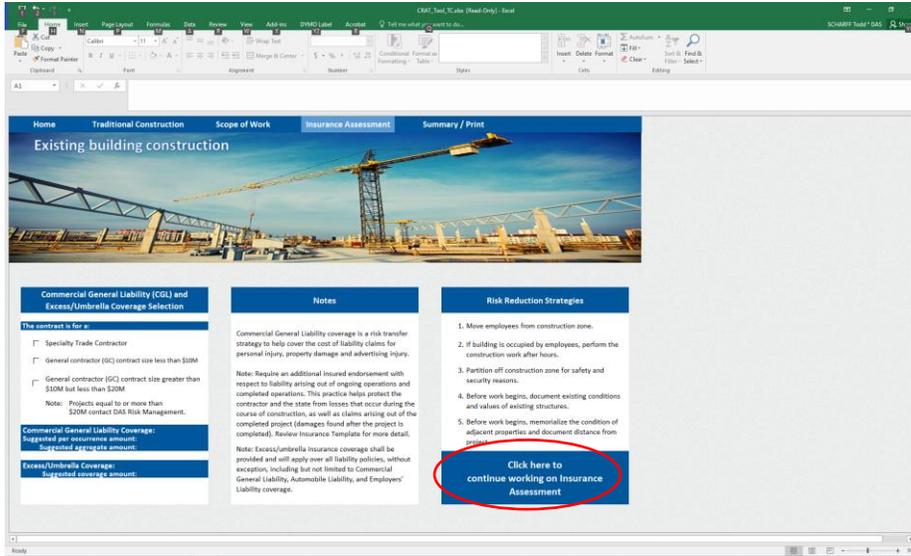
**Step Six: Complete assessment for each type of insurance shown.**

For example:

1. Click General Liability and Umbrella Coverage (the tool provides information related to each type of coverage).



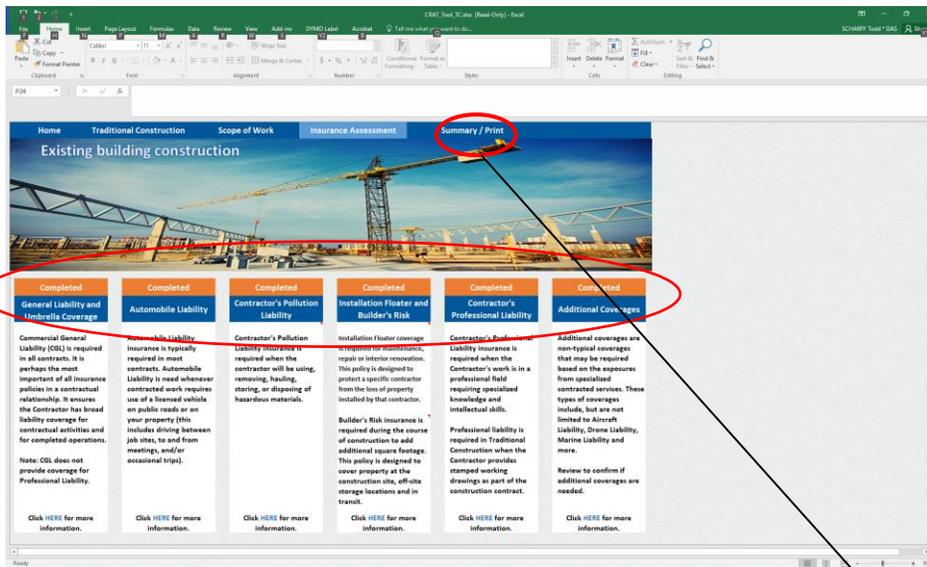
- After assessing for General Liability and Umbrella Coverage, select “Click here to continue working on Insurance Assessment”. The tool will return to the previous page where the next coverage can be selected and assessed (such as Automobile Liability).



- Repeat the process until all coverages, including “Additional Coverages,” have been assessed.

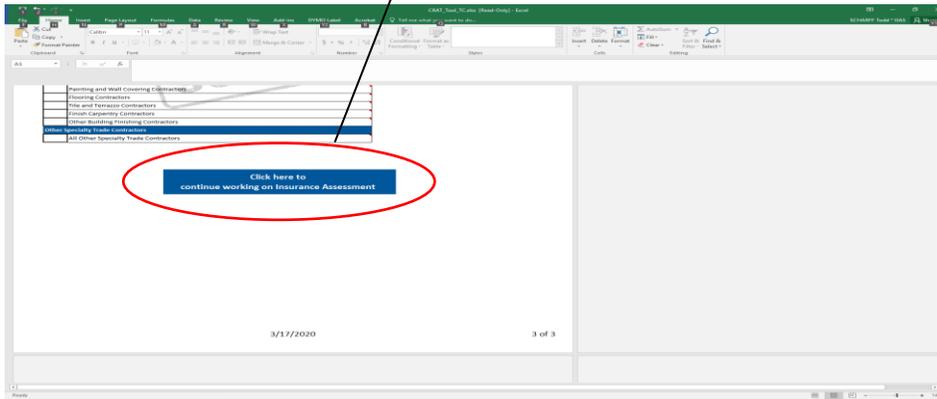
**Step Seven: Review summary of insurance requirements.**

- Once all potential insurance requirements have been assessed for, the screen will show them as Completed (NOTE: An exception to this is if a particular insurance requirement does not apply.)



- Click on “Summary/Print” to review selected insurance types and amounts (see above).

- The bottom of the summary page provides a link back into the assessment if further work/assessing are needed (see below).

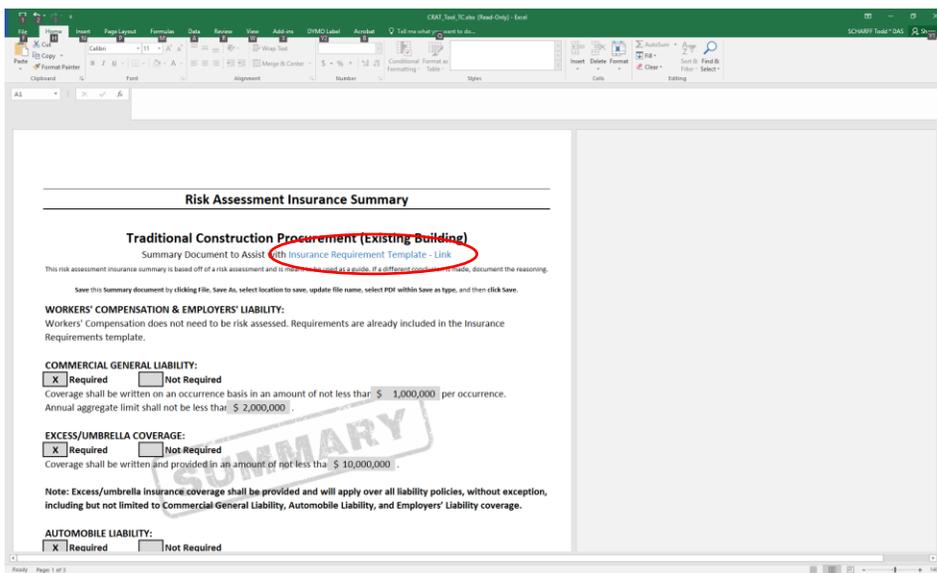


**Step Eight: Complete appropriate insurance requirement exhibit template.**

Transfer the assessment results shown on the summary page to the corresponding insurance requirement exhibit.

*As with the tool, be sure to select the correct template based on the type of contract (Traditional Construction, Design/build, etc.).*

The summary page provides a link back to the website for obtaining the insurance requirement template.



**Additional Notes:**

- Throughout the assessment, the tool provides various pop up boxes (marked with small red triangles) and additional tips/information to assist with the risk assessment process.
- The tool will identify certain situations to contact DAS Risk Management for additional assistance. This is typically due to higher than normal exposure or large projects that may benefit from such additional assistance.

**For questions or assistance, you may contact DAS Risk Management at:**

**[Risk.Management@Oregon.gov](mailto:Risk.Management@Oregon.gov)**