Project Manual for Architects/Engineers Managing OCP Projects
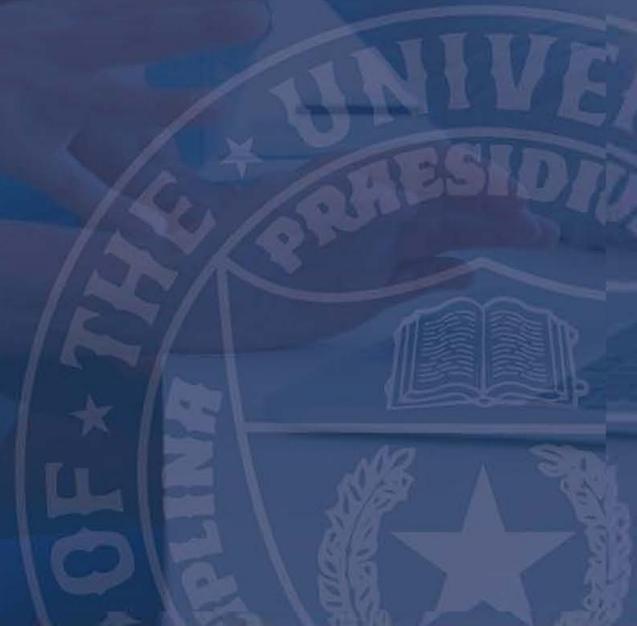
Table of Contents - On-Board Packet

Section I

HUB Office/ Good Faith Effort Requirements

The following information is required by the HUB Department to effectively track HUB participation on this project.

1. A revised HUB plan is required after sub-consultants are under contract.
2. HUB plan must also be revised if:
   a. There are changes in contract amount for existing subconsultants, or
   b. There is/are addition(s) of sub-consultant/scope through an ASP**.
3. Notify HUB Coordinator of any changes in architect team/staff or B2G coordinator.
4. Monthly data entry of sub-consultant payments into the Contract Compliance system (B2G). **(Subconsultant payments not entered in a timely manner will be subject to payment hold)*****
5. Monthly update of sub-consultant contract amounts if any changes (Hint: Contract amounts on the Contract Compliance system (B2G) should always match the contract amounts on the HSP)

**For ASPs-Good Faith Effort where additional scope is required:*

1. *Perform CMBL search to include additional HUBs to propose on the project (See CMBL search instructions of this manual or on-line at www.utsystem.edu/hub, Quick Links).*
2. *Use the list of Small Minority and Woman Business Trade Organizations and Development centers provided on the state comptroller's website. See link below.*
   https://comptroller.texas.gov/purchasing/vendor/hub/resources.php

****Per TAC 20.285, Subcontracts, Compliance report submission is a condition of payment; therefore, general contractors whose subcontractor payments are not entered into the UT System Contract Compliance database by the end of each month are subject to a payment hold.*

Section II

HUB Subcontracting Plan (HSP)
For Professional Services

Please follow the link below for the most current HSP form:

AE/Professional Services - HSP

Section III

Centralized Master Bidders List (CMBL)
& HUB Directory Search

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The CMBL is a master database used by the state of Texas purchasing entities to search for vendors/contractors based on the products or services they can provide to the state of Texas.

Please follow the link below for CMBL Search Instructions:

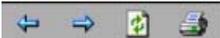# How to Search the CMBL

Section IV

<u>B2G Contractor Training</u>

1. Provide list of individuals who will need access to this project. Need Name, title, phone and e-mail information. Designate one person who will receive notifications from the system. *NOTE: If this person changes, please notify your HUB representative so it can be changed.*

2. Dashboard
   a. Shows incomplete audits-click on red number to view the list of contracts
   b. Past due audits-click on the red number to view the list of contracts
   c. Show left tool bar- Click "**Help & Support**" for training classes, user manual or click "**Other Help guides**" for more training guides.

3. To find a contract-
   a. Go to "**View and click Contracts**" and scroll until you find the project name and number

   -OR-

   b. Go to "**Search**" and type the number in the 1st line in the search parameters
   c. Click on the contract

4. Tabs
   a. **Main Page** – basic information about the contract
   b. **View** – Summary of information that was added
   c. **Subcontractors** – shows the list of contractors, contract amount, HUB status, ability to add a 1st tier or 2nd tier sub to the list.
   d. **Compliance Audit List**- shows all payment made to the general contractor to date
   e. **Compliance Audit Summary**- Shows current contract value, Current Award for prime and HUB subs, progress toward HUB goal

5. To get to the payment screen – Click the "**Compliance Audit List**" tab, then select the month to add payments (**View Audit**). Then click "**Report ___subcontractor payments**" Then select "**Submit all Incomplete Records**". Goes to a list of all subcontractors that need payments recorded for the month. Add all payments and click "**Save**". Or to enter a payment to one sub, from the "**Subcontractor Detail**" click "**Submit Response**" (usually in red) and add the payment information. **Note: Enter payments in the month you paid the sub**.

6. To print the sub payments entered to attach to the PAR form, go to "**Compliance Audit List**", click on the month you just entered, then "**View Audit**", and at the bottom of the page it says in small blue type "**Print this page**".

Note: Please update on a subcontractor payments monthly basis as well as the contract amounts for all your subs. The audit will lock when payments are not entered before the deadline. For example, the reporting deadline for December is 01/31/2020 and the audit will lock on 03/01/2020.   When the audit locks on 03/01/2020, we will request payment hold until the information is entered into the computer.

Dashboard

B2GNOW

A summary of reports due, and past due, are provided under My Contract Audits on the Dashboard of your account.

8

Prime Contractor Report

Real-time goal status is displayed under the Audit Summary of each report.

To report ALL subcontractor payments, click the 'Submit All Incomplete Records button.

Contract Audit: February 2010

Contract Main | View Contract | Subcontractors | Compliance Audit List | Messages | Comments | Reports

88787878: Lobby Repairs
Prime: **Prime Contracting, Inc.**

Status: Open
1/1/2010 - 1/1/2012
Current Value: $980,000

Listed are subcontractors assigned to this contract. Click the links to the right of the vendor's name to submit or edit a response. You must submit data on each subcontractor to complete the audit.

Audit Information

Audit Response Status	Not complete; 2 sub response(s) to be submitted. (View Detail)
Audit Period	February 2010
Payment to Prime	$95,000.00
Marked As Final Audit?	No (mark audit as final)
Contract Number	88787878
Contract Title	Lobby Repairs
Prime Contractor	Prime Contracting, Inc.

Audit Summary - Total Contract Through TODAY (9/22/2010)

	Award	Award Percent	Payments	Payments Percent	Difference (Payments - Award)
Prime Contract	$980,000.00		$185,000.00		
For Credit	$245,000.00	25.000%	$23,000.00	12.432%	12.568% below goal
For Credit to MBE Goal	$147,000.00	15.000%	$14,000.00	7.568%	7.432% below goal
For Credit to WBE Goal	$98,000.00	10.000%	$9,000.00	4.865%	5.135% below goal
Contract Progress	18.9%				
For Credit Progress	9.4%				

Award values may not match due to differences between overall contract goal and subcontractor assignments.

[Mark 2 Remaining Subcontractors as Zero]   [Mark Audit as Final]

[Submit ALL Incomplete Records]   [Add Subcontractor]   [Report Error]

Subcontractor Payments for February 2010

Subcontractor	Certified	Type	Inc. in Goal	Goal Type	Actions	Paid Amount in February 2010	Confirmed by Sub	Total To February 2010	Contract Goal	Actual Percent
Sub Flooring, LLC Veronica Lara kathy2@b2gnow.com	Yes	Sub 100%	Yes	WBE	**Submit Response**	Not Reported	--	$9,000.00	10.000%	4.865%

9

Subcontractor Details

Mark 2 Remaining Subcontractors as Zero | Mark Audit as Final

Submit ALL Incomplete Records | Add Subcontractor | Report Error

Subcontractor Payments for February 2010

Subcontractor	Certified	Type	Inc. in Goal	Goal Type	Actions	Paid Amount in February 2010	Confirmed by Sub	Total To February 2010	Contract Goal	Actual Percent
Sub Flooring, LLC Veronica Lara kathy2@b2gnow.com P 602-325-9277, F 602-325-9277	Yes	Sub 100%	Yes	WBE	**Submit Response**	Not Reported	--	$9,000.00	10.000%	4.865%
Sub System Construction Marlin Kaplan vendor2@b2gnow.com P 602-325-9277, F 602-866-7788	Yes	Sub 100%	Yes	MBE	**Submit Response**	Not Reported	--	$14,000.00	15.000%	7.568%

Click subcontractor name to view payment history for this contract. Click contact person's name to send them a message.

Alternatively, payment information may be reported for a single subcontractor by clicking on the individual 'Submit Response' link.

Send an email directly to the contact listed by clicking on their name or email address. Messages and replies are maintained on the contract record.

Certification and for Credit (Inc in Goal & Goal Type) status are displayed along with paid to date amount & percent as compared to the contracted percent of the prime award.

10

Submit One Payment Report

B2GNOW

Audit Information

Enter the audit amount for the designated time period. You can attached files or add comments, if necessary.

Amount PAID For February 2010 *

$ [＿＿＿＿＿＿]

>> Do NOT enter invoice amount.

Payment Detail

(Optional) Enter details of PAID check numbers and amounts for February 2010. This optional detail will speed up the subcontractors confirmation of your payment information. This information will be displayed to Sub Flooring, LLC.

Attach File(s)   [Attach File]

Comments

(Optional) These comments are visibl

1. Simply enter the total amount paid to the subcontractor during the reporting period. If the prime pays more than once during the period, enter the total of all payments.

2. A note to the sub may be entered under 'Payment Detail'. Prime contractors should enter reference information such as invoice numbers and amounts to aid the subcontractor.

3. Optional comments visible only to UT System.

[Spell Check]   [Review]   [Cancel]

11

Submit Payments for All

Subcontractor Payment Information

Subcontractor	Total Through January 2010	Contract Goal	Actual Percent Through January 2010	Payment for February 2010	Payment Detail	Comments
Sub Flooring, LLC	$9,000.00	10.000%	4.865%	$		
Sub System Construction	$14,000.00	15.000%	7.568%	$		

The 'Submit All Incomplete Records' option displays the list of subcontractors with data entry columns for Payment Amount and other details that may be configured for the reporting agency, such as payment date.

Simply enter the Payment data, using the tab or enter keys, click Save at the bottom of the page to submit the report.

Prime contractors spend approximately 2 minutes a month reporting subcontractor payments online in B2Gnow.

Print Subcontractor Report

B2GNOW

Print completed subcontractor payments to PDF
and attach to the State of Texas Progress Assessment
Report (PAR), page 17, and include with all requests for payment.

Attach State of Texas
Progress Assessment Report (PAR)

The PAR is the form prime contractors have been using to report subcontracting expenditures. This is a required report by the State of Texas and will continue to be included. Please complete the top section of the PAR, sign the bottom portion and attach the PDF subcontractor report (page 16). **Submit both forms to OFPC with all requests for payment.**
<u>This is a condition of payment by OFPC.</u>

HUB Subcontracting Plan (HSP)
Prime Contractor Progress Assessment Report

Rev. 10/14

This form must be completed and submitted to the contracting agency each month to document compliance with your HSP.

Contract/Requisition Number: _____ Date of Award: _____ Object Code: _____

Contracting Agency/University Name: _____

Contractor (Company) Name: _____ State of Texas VID : _____

Point of Contact: _____ Phone #: _____

Reporting (Month) Period: _____ Total Amount Paid this Reporting Period to Contractor: $ _____

Report HUB *and* Non-HUB subcontractor information

Note: Texas certified HUB status can be verified on-line at: https://mycpa.cpa.state.tx.us/tpasscmblsearch/index.jsp

Subcontractor's Name	*Texas certified HUB? (Yes or No)	Subcontractor's VID or HUB Certificate Number (Required if Texas certified HUB)	Total Contract $ Amount from HSP with Subcontractor	Total $ Amount Paid this Reporting Period to Subcontractor	Total Contract $ Amount Paid to Date to Subcontractor	Object Code (Agency Use Only)
Complete top and bottom portions of the PAR form and attach a copy of The University of Texas Contract Management System (UTCMS) Compliance Report (page 20). The UTCMS Compliance Report is applicable only to UT System OFPC managed construction projects. Only prime general contractors and prime architects/engineers will utilize the UTCMS system.			$ -	$ -	$ -	
			$ -	$ -	$ -	
			$ -	$ -	$ -	
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17

Instructions for General Contractor-
B2G Subcontractor Payment Confirmation

These instructions begin after the general contractor has entered the subcontractor payment into the B2G system and the subcontractor has responded regarding the payment amount entered. If the Subcontractor agrees with the payment amount entered, the audit will reflect complete on the contract audit list. If the subcontractor disagrees with the payment amount, the general contractor will notice on the dashboard in red "audit discrepancy" and a number also in red. See below.

Click on the number and it will take you to Contract Audits screen. See below.

Under status, Click on Discrepancy. The next screen will be the "Audit Notice" screen. See below.

Compliance Audit: Audit Notice for November 2019

Help & Tools ⚒

Contract Main | View Contract | Subcontractors | Compliance Audit List | Compliance Audit Summary | Messages | Comments | Reports

University of Texas System	Status: Open
234-5678: Test Contract 23	11/1/2019 - 12/31/2099
Prime: Test Prime Vendor	Current Value: $1,000,000

This is an audit notice for the contract listed below. Submit a response for each item listed below by clicking each link in the **Audit Actions** table. It is possible that some actions are not available at a specific time due to pending reports from other contractors.

Compliance Audit Information

Compliance Audit Period	November 2019
Date & Time Posted	Local: 6/15/2020 2:21:38 PM CDT System: 6/15/2020 2:21:38 PM CDT

Submit a response for each item listed below by clicking each link. It is possible that some actions are not available at a specific time. As the **prime contractor** your responsibility is to report payments made to subcontractors.

Compliance Audit Actions

Category	Action Required & Response Due Date
Prime Contractor	Resolve 1 discrepancy

Compliance Officer Information

Contact Person	Stephanie Park
Organization	University of Texas System
User Number	30000063-0016

Buyer/Project Manager Information

Contact Person	Contact Person
Department	102 UT Aus
User Number	10004336-0001

Click on resolve discrepancy to go to the next screen. See below.

Compliance Audit Information

Compliance Audit Status	Data entry complete 1 discrepancy reported by subcontractor.
Compliance Audit Period	November 2019
Payment to Prime	Payment to prime not reported yet
Marked As Final Audit?	No (mark audit as final)

Compliance Audit Summary - Total Contract Through TODAY (6/15/2020)

	Award	Award Percent	Payments	Payments Percent	Difference (Payments - Award)
Prime Contract	$1,000,000.00		$0.00		
For Credit	$211,000.00	21.100%	$9,800.00	0.000%	
Goal Types					
For Credit to **HUB** Goal	$211,000.00	21.100%	$9,800.00	0.000%	
Contract Progress					
For Credit Progress	5%				

Award values may not match due to differences between overall contract goal and subcontractor assignments.

[Mark 0 Remaining Subcontractors as Zero]   [Mark Audit as Final]

[Submit ALL Incomplete Records]   [Report Error]

Subcontractor Payments for November 2019

	Subcontractor	Certified	Type	Inc. in Goal	Actions	Paid Amount in November 2019	Confirmed by Sub	Total To November 2019	Contract Goal	Actual Percent
1	Test Sub vendor Stephanie Sub Stephanie@TestSub.com P 234-456-7891	No	Sub 100%	✓ HUB	View Edit	$1,400.00	Rejected Resolve Discrepancy	$1,400.00	1.000%	0.000%

Click subcontractor name to view payment history for this contract. Click contact person's name to send them a message.

[Return to Audit Notice]

At the top of this screen it shows that there is one discrepancy reported by the subcontractor. At the bottom, find the subcontractor name and click on "Resolve Discrepancy" in the "Confirmed by Sub" column. The next screen will be the Discrepancy Resolution page. See below.

Compliance Audit: Discrepancy Resolution

| Contract Main | View Contract | Subcontractors | Compliance Audit List | Compliance Audit Summary | Messages | Comments | Reports |

University of Texas System　　　　　　　　　　　　　　　　　　　　　　　　Status: **Open**
234-5678: Test Contract 23　　　　　　　　　　　　　　　　　　　　　11/1/2019 - 12/31/2099
Prime: **Test Prime Vendor**　　　　　　　　　　　　　　　　　　　Current Value: **$1,000,000**

A discrepancy has been reported for this audit for the listed time period. If the audit is pending a response, click the **Resolve Discrepancy** button to submit information.

[Resolve Discrepancy]　　[Audit Notice]

Discrepancy Resolution

| Status | Awaiting prime and subcontractor response. |

Compliance Audit Information

| Compliance Audit Period | November 2019 |
| Compliance Audit Number | 04957642-0002 |

Original Compliance Audit Data Reported

Amount Reported by Prime	$1,400.00
Amount Reported by Subcontractor	$0.00
Payment Date (Prime Reported)	11/5/2019
Subcontractor Public Comments	add comment

Discrepancy Resolution Data Reported

| New Amount Reported by Prime | No response yet. |
| New Amount Reported by Subcontractor | No response yet. |

Compliance Officer Information

Compliance Officer	Stephanie Park
Organization	University of Texas System
User Number	30000063-0016
Email	spark@utsystem.edu
Phone	512-499-4378
Fax	512-499-4311

Prime Information

Business Name	Test Prime Vendor
Vendor Number	20946424
Contact	Stephanie Prime
Email	Stephanie@TestPrime.com
Phone	123-456-7891
Fax	

Subcontractor Information

Business Name	Test Sub vendor
Vendor Number	20946425
Contact	Stephanie Sub
Email	Stephanie@TestSub.com
Phone	234-456-7891
Fax	

Prime Audit

	Responder
Name	Same as assigned Prime contact.
Response Date	Local: 6/15/2020 3:00:06 PM CDT System: 6/15/2020 3:00:06 PM CDT

Subcontractor Audit

	Responder
Name	Same as assigned subcontractor contact.
Response Date	Local: 6/15/2020 3:09:58 PM CDT System: 6/15/2020 3:09:58 PM CDT

Prime Discrepancy Response

| | Responder |
| Name | No response yet. |

Subcontractor Discrepancy Response

get

| | Responder |
| Name | No response yet. |

[Resolve Discrepancy]　　[Audit Notice]

Notice at the top and bottom of the page there is a "Resolve Discrepancy" button. Also notice that in the "Original Compliance Audit Data Reported" section, it shows the amount the subcontractor is saying he was paid. Below that is a comment regarding the amount paid.   Whether the general contractor agrees or disagrees, click on "Resolve Discrepancy" at the top or bottom of the page.

Complete the form:

> Confirm Payment reported as correct or incorrect;
> Add: Public comments-UT System and general contractor can see these comments, or:
> > **Note: Enter comments so the subcontractor knows why you agree or disagree with this amount.**
> Add: Private Comments-**Only** UT system will be able to see these comments.
> Save Response.

If the general contractor agrees with the amount reported by the subcontractor, click agree on the form. The subcontractor will be asked to confirm the new payment amount. After the subcontractor has confirmed the new payment amount, the new amount will automatically be changed on the sub payments screen.

If the general contractor disagrees with new payment amount there is still a discrepancy and a notice will go back to the subcontractor to resolve. After the general contractor response is saved, the overview screen showing the general contractors response is reflected. See below.

Discrepancy Resolution

Status	Prime has responded to discrepancy. Awaiting subcontractor response.

Compliance Audit Information

Compliance Audit Period	November 2019
Compliance Audit Number	04957642-0002

Original Compliance Audit Data Reported

Amount Reported by Prime	$1,400.00
Amount Reported by Subcontractor	$0.00
Payment Date (Prime Reported)	11/5/2019
Subcontractor Public Comments	add comment

Discrepancy Resolution Data Reported

New Amount Reported by Prime	$1,400.00	Included in Goal
New Amount Reported by Subcontractor	No response yet.	
New Prime Public Comments	Please see check # 1234 dated 11/05/2019. Cleared on 12/01	
New Prime Private Comments	add comment	

Compliance Officer Information

Compliance Officer	Stephanie Park
Organization	University of Texas System
User Number	30000063-0016
Email	spark@utsystem.edu
Phone	512-499-4378
Fax	512-499-4311

Compliance Officer Information

Compliance Officer	Stephanie Park
Organization	University of Texas System
User Number	30000063-0016
Email	spark@utsystem.edu
Phone	512-499-4378
Fax	512-499-4311

Prime Information

Business Name	Test Prime Vendor
Vendor Number	20946424
Contact	Stephanie Prime
Email	Stephanie@TestPrime.com
Phone	123-456-7891
Fax	

Subcontractor Information

Business Name	Test Sub vendor
Vendor Number	20946425
Contact	Stephanie Sub
Email	Stephanie@TestSub.com
Phone	234-456-7891
Fax	

Prime Audit

	Responder
Name	Same as assigned Prime contact.
Response Date	Local: 6/15/2020 3:00:06 PM CDT System: 6/15/2020 3:00:06 PM CDT

Subcontractor Audit

	Responder
Name	Same as assigned subcontractor contact.
Response Date	Local: 6/15/2020 3:09:58 PM CDT System: 6/15/2020 3:09:58 PM CDT

Prime Discrepancy Response

	Responder
Name	Same as assigned Prime contact.
Response Date	Local: 6/15/2020 3:38:31 PM CDT System: 6/15/2020 3:38:31 PM CDT

Subcontractor Discrepancy Response

get

	Responder
Name	No response yet.

[Resolve Discrepancy]   [Audit Notice]

A Discrepancy will continue until the general contractor and the subcontractor agree on the amount paid. If the discrepancy is unable to be resolved by the general contractor and subcontractor, the UT System Contract Compliance officer will assist with resolution of the discrepancy.