

Navigating B2GNow

CDOT manages nearly all of its Civil Rights Requirements in CDOT's Business Management System B2GNow (contracts.codot.gov). This guide will help you navigate the system and complete all¹ of the Contractor and Consultant related tracking requirements for both the preconstruction and construction phases of a CDOT project.



SYSTEM ACCESS

Find your account information

- Account Lookup
- Forgot Password

Check if you have an account or generate a temporary password

CERTIFICATIONS (DBE & ESB)

- Businesses
- Should I Apply?
- Apply for Certification
- DBE Directory
- ESB Directory

Small Business Directories
No Login Required

REGISTRATION AND PREQUALIFICATION

Do highway construction work with CDOT

- Prequalify
- Register
- View Active Bid Plans
- Search Vendor Directory

Active Bid Plan Sneak Peak
No Login Required

GET HELP

Resources for working with CDOT

- Resources & Information
- Contact Us

Find out if your Subs are registered
No Login Required

¹Certified Payroll requirements are not included in this guide and are managed at LCPtracker.net



Creating an Account

The Civil Rights and Business Resource Center creates all Staff User accounts (CDOT staff and consultant engineers). Consultant Engineers may have both vendor-user accounts (for their firm) and staff user accounts (for their CDOT duties). These accounts will use the same credentials. To create an account with Staff User authority for either a CDOT employee or a consultant engineer, contact the CRBRC.

Home Screen (or Dashboard)

Your Dashboard contains quick links and to dos separated based on the modules in the system. From this launching point, you can easily access CDOT forms, certification applications, prompt payment audits, account settings, vendor profile information, and more. All underlined text and numbers represent a link and can take you directly to the relevant page.

Personalize Your Dashboard

1. Select [Personalize](#) in the Dashboard welcome screen toward the left side of the home screen.

Click [Personalize](#) to get started.

2. Based on the following table, select the modules most relevant to your position.

Department	Team/Role	Suggested Modules
Headquarters	Certifications	Certifications, Certification Applications
	Civil Rights Compliance	Contracts, Contract Audits, Contracts Summary, Utilization Plans
	Contracts	Vendors
	Engineering or Specialty Units	Priority Flagged Contracts
Region	Region Management (RTD, RCRM, Program Eng.)	Favorite Reports, Contract/Concessions Summary (For Organization), Contract Summary, (For Organization), Contract Audits (For Organization)
	Region Civil Rights Officer	Contract/Concessions Summary (For User), Contract Summary (For User), Contract Audits (For User)
	Resident Engineer	Contract/Concessions Summary (For User), Contract Summary (For User), Contract Audits (For User)
	CDOT Project Managers	Priority Flagged Contracts, Contract Audits (For User)

3. Select **Add to Dashboard** at the bottom of the list.
4. Add additional modules at any time by selecting Personalize from the yellow bar in the upper Right corner of the home screen.
5. Remove or modify the settings of any widget by selecting [Config](#) immediately below and to the right of the widget.





Permanent Widgets

The Alerts, System News, and Tools widgets cannot be removed from the Dashboard. You can, however, move or change the color of these permanent widgets.

System News

NEW FEATURE -- "Saved Search Parameters"

A little bit of development magic to report -- you can now save search parameters for future use. Run any kind of search (vendor, certified vendor, contract, etc.) and at the bottom of the results page click the **Save Search Parameters** button, enter a descriptive reference name, and save. Every time you revisit the search page, there will be a **Used Saved Search** button at the top that will list all saved searches available to you. #WishListDreamsDoComeTrue!

*Note: this feature does not save the search results, it saves the search **parameters**. So using the saved search in the future will rerun the search parameters with then-current data. It saves the time of having to manually enter multiple parameters for complex searches.*

Have you seen the **Wish List** module? [Check it out here](#) to submit ideas for system enhancements, vote on others' suggestions, and join the discussion by adding comments. We welcome your feedback to build a better system.

Recent Enhancements - Click [View New System News](#) below for details.

[View all System News](#)

[Config](#)

Navigate Your Dashboard

Every blue or red underlined number represents clickable quick-access link to the relevant module. Red links represents a to-do for the User, Region, or Agency that must be addressed. Blue links are quick access links that will take you directly into the linked contract, module, or audit. The diagram below explains what each red link means.

Contract #	Total	> 90 days
Total Audits	1950	1701
Incomplete Audits	332	231
Discrepancies	26	22
Closeouts/Final	30	20
Past Due Audits	40	19
Sub Requests - New	1	0

Required Housekeeping; Condition of closing not met

Talk to Region Civil Rights

Condition of Payment not met

Preconstruction-Related Request

Displaying Organization Data - [Config](#)

Priority Flagged Contracts

Contract #	Status & Dates	Contract Value	Total Payments	Credit Payments	% Goal % Credit
test001	Closed 4/2017 to 4/2022	\$0	\$0	\$0	0.0% 0.0%

[Config](#)



Navigation Menu

Home	- Return to the Dashboard
View »	
Alerts	
Contracts	- View a list of all your viewable contracts
Contract Audits	- View all recent viewable contract audits
Sub Requests	- For Preconstruction only, view pending subconsultant requests
Projects	- For Preconstruction only, view list of accessible projects
Outreach Campaigns	- View list of email outreach campaigns
Events	- View list of B2G managed events
Vendor Lists	- View pre-created vendor lists for outreach purposes
Prevailing Wage	
Proposals	- View list of all advertised projects (past and future)
Utilization Plans	- View all visible pending and approved utilization plans
Certification Apps	- View pending and past certification applications
Certification Processing Records	- View “Received” certification applications
Certification Change Requests	- View requests to update general certification information
Registrations/Prequalification	- View of list of firms with pending or approved questionnaires
Support	- View support queue
Messages	- View in-system messages
Search »	
Vendors	- Search all vendors in the national B2G database
Certified Vendors	- Search all vendors with a certification recognized by CDOT
Users	- Search staff or vendor users by contact information
Contracts	- Search contracts by number, prime/subcontractor, etc.
Outreach Campaigns	
Proposals	- Search for specific ad documentation/utilization plans
Certification Apps	
Search Results »	
Reporting »	- Access full list of available reports
Create »	- Create new contracts, proposals, projects, vendor lists, etc.
Tools »	- Switch between linked accounts
Settings »	- Change password, add users, etc.
Help & Support »	
Logoff	- Log Off

Locating & Flagging Contracts

Search

- From the Navigation Menu, select **Search >> Contracts**

- Enter the five-digit CDOT contract number (or PO number for Professional Service contracts), title, or contractor, then click **Search**.

<u>Contract Number</u>	
<u>000010</u>	<u>R1 Test</u>

- Click the contract number next to the contract you want to review.

Flagging & Accessing Priority Contracts

- Locate the contract through the Search mechanism above.
- Under the gray bar on the main tab of the contract, select [Add to Dashboard as Priority Flagged Contract](#).

Status: Closed
Current Award: \$0
Goal: 0.00%
Total Paid: \$0
% Credit: 0.00%
For Credit: \$0

[Add to Dashboard as Priority Flagged Contract](#) [Refresh Page](#)

Priority Flagged Contracts
Contract #
test001

- Once flagged, you can access the contract from the Dashboard by clicking on the contract.
- To remove flag, re-enter the contract and click [Remove from Dashboard](#).

Navigating Contracts

[Main](#) | [View](#) | [Settings](#) | [Subs](#) | [Docs](#) | [Change Orders & Task Orders](#) | [Alerts](#) | [Comments](#) | [Messages](#) | [Closeout](#)
[Compliance Audit List](#) | [Compliance Audit Summary](#) | **Compliance Audit FY** | [Reviews](#) | [Site Visits](#) | [Reports](#)

test001: test As Needed Test
 Prime: CDOT Prime Test 1
 4/14/2017 - 4/14/2022; Closed 6/15/2017

Main

Change the compliance contact and find quick Links to manage subcontractors, task orders, etc.

Contract Status & Actions			Action
Contract Status	Closed		View Contract , Edit Contract , Close Out Change Secondary Status to: None selected
Compliance Officer	Assigned		Change Compliance Officer to: Erica Downey (Engineer)
Workforce/Prevailing Wage Compliance Officer	Assigned		Change Workforce CCO to: Erica Downey (Engineer)
Compliance Monitoring	On Demand (Monthly)		
Subcontractors	No subs		Manage Subcontractors
Task Orders			Create Task Order
Contract Change Orders			Amend Contract , Change Value
Contract Extensions/Shortenings			Extend/Shorten Contract

Subs Tab: All subs with approved 205s.

	Subcontractor Tier & Name	Certified	Subcontract Amount	Type	Inc. in Goal	1432 required?	Compliance Audit	Final Pmnt
1	CDOT Sub Test 1	No	\$100,000	Sub	No		✓	No
2	CDOT Sub Test 2	No	\$10,000	Sub	No		✓	No

DBE or ESB? Sub or Supplier? 205 work completed?
 Included in Compliance Audit. All subs must be included until released from project

Docs: Add and View all Documents

[Add Document](#)

Subcontractor Documents

View (PDF, 187.64 KB)	ATZ Construction Services (more)
View (PDF, 773.99 KB)	Your Way Safety and Sign Supply, Inc. (more)
View (PDF, 203.03 KB)	Cruz Construction, Inc. (more)



Change Orders & Task Orders

Change Contract Value Extend/Shorten Contract

Preconstruction only: record changes to the contract value or end date, track connected task orders, and enter new contracts.

New Task Order Link Existing Contract As Task Order

Comments

Add private comments viewable to all users linked to the firm's visible account. These comments are not visible to subs or to CDOT.

Add New Comment

Enter comment information and parameters. Click **Save Comment** to complete the process.

Comment Type *

- Standard Comment
- Comment with Due Date: (mm/dd/yyyy)
 - Add alert for this comment.

Closeout

Verify & record information required to close contract.

Close Contract

Contract Status: **Open**

Close Date: (mm/dd/yyyy)

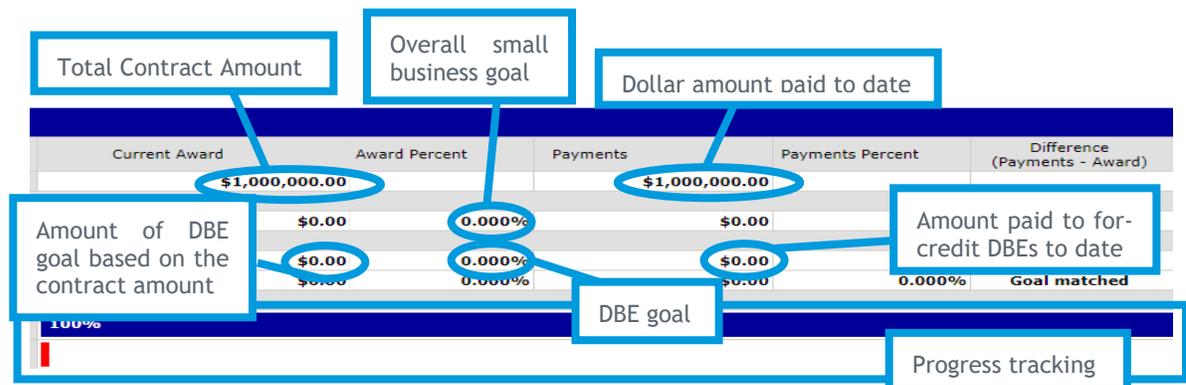
Compliance Audit List

View a list of the Audit Period, Status, and Amount Paid to Prime for each of your monthly audits on the contract.

Audit Period	Status	Paid to Prime
April 2018	Pending Prime Report	Pending
March 2018	Incomplete	Pending
February 2018	Incomplete	Pending
January 2018	Incomplete	Pending
December 2017	Incomplete	\$700,000.00
November 2017	Incomplete	\$300,000.00

Compliance Audit Summary

Review the ongoing progress toward contract completion and the DBE goal. Does not show progress toward commitments.



Assembling Projects (Preconstruction/Professional Services)

Creating a Project

1. From the Navigation Menu, select **Create >> New Project**

2. On the form, enter the name of the project, the five digit subaccount number, the dollar value of the project (or 0.00). List the Region Civil Rights Manager as the compliance officer and select your region in "Assigned Organization."
3. Click Review, then click Save.

Adding Contracts to a Project

1. From the main tab of the project, select [Manage Contracts](#), or click the Contract List tab at the top of the page to view all linked contracts and add as necessary.

2. Click **Link Existing Contract**, then **Select a Contract to Link**.



3. In the first line, enter the PO number of the task order you want to add. Search.

4. On the far right side of the search results, click [Select Contract](#).

5. On the next screen, select **Link Record**.



Review Past Due Audits

Every Prime and Subprime contractor on the project must report how much it paid its direct subcontractors by the 16th of the month. The prime must ensure that its middle tier subs are reporting. This report has replaced CDOT Forms 1418 & 1419, so failure to completing this report is a condition of payment. Without this reporting, CDOT is unable capture and monitor prompt payment information.

- From the Contract Audits in your Dashboard, select the red number in the “Past Due Audits” line.

<u>Contract Audits</u>	Total	< 90 days	> 90 days
Total Audits	1913	468	1445
Incomplete Audits	468	228	240
Discrepancies	28	8	20
Closeouts/Final	27	16	11
Past Due Audits	28	14	14
Sub Requests - New	2	2	0

- In the list that comes up, use the drop down menus to filter the audits by month and status

Reporting Status	Audit Period	Contract
Pending All	Mar-2018	
Pending sub (4)	<u>March 2018</u>	C20819
Pending prime (3) Prime past due	<u>March 2018</u>	18-HAA-XB-00085 T/O 1

- Use the table to the right to determine which month you should filter by to clean up older audits.
- Filter by Prime Past Due status to find only late audits.
- Click the blue, underlined audit period to enter the audit (see image from step 3).
- All past due lines will be labelled “Not Reported” the boxed number on the left side of the screen will indicate the tier of the sub whose information has not been reported. If Tier 1 subs are not reported, the prime is responsible for logging in and reporting that information even if \$0.00. If lower tier subs have not been reported, the middle tier subs are responsible for reporting, but the prime is responsible for ensuring that happens. In either event, contact the prime - complete reporting is a condition of payment.

On the 16 th of...	filter By...
January	December
February	January
March	February
April	March
May	April
June	May
July	June
August	July
September	August
October	September
November	October
December	November

American Striping Contractors Inc [Info] Alexandra Harvey alexandra@americanstripingcompany.com P 303-513-4521, F 303-300-9181	✔	Sub	No	Not Reported Edit
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Close Incomplete Audits

Per section 109.06 of CDOT’s Standard Contract Specification, subcontractors get 15 days to respond to reports from their higher tiers. After 15 days pass, we can close the audits. Contracts in B2G cannot be closed until all audits have been closed.

- From the Contract Audits in your Dashboard, select the red number in the “Incomplete Audits” line.

Contract Audits	Total	< 90 days	> 90 days
Total Audits	1548	468	1445
Incomplete Audits	468	228	240
Discrepancies	28	8	20
Closeouts/Final	27	16	11
Past Due Audits	28	14	14
Sub Requests - New	2	2	0

- In the list that comes up, use the drop down menus to filter the audits by month and status

Reporting Status	Audit Period	Contract
Pending All	Mar-2018	
Pending sub (4)	<u>March 2018</u>	C20819
Pending prime (3) Prime past due	<u>March 2018</u>	18-HAA-XB-00085 T/O 1

- Use the table to the right to determine which month you should filter by to clean up older audits.
- Filter by pending status to find only open audits.
 - Pending Prime: Not all contractors have reported. The number in parenthesis shows you how many lines are incomplete.
 - Pending Sub: Not all contractors have responded to the audit. The number in parenthesis shows you how many lines are incomplete.
 - Prime Past Due: Reporting deadline has past. Not all contractors have reported (see previous page).
 - Pending all: shows all open audits.

On the 16 th of...	filter By...
January	November
February	December
March	January
April	February
May	March
June	April
July	May
August	June
September	July
October	August
November	September
December	October

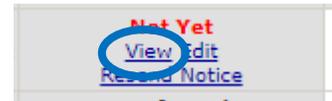
- Click the blue, underlined audit period to enter the audit (see image from step 3).
- Identify all contractors listed as “Not Yet.” These are your incomplete records.

1	Alpha & Omega Consultants, Inc. [Info] Dan Trujillo P 303-467-1700, F 303-467-1100	\$0.00 View Edit Prompt: Yes	Not Yet View Edit Resend Notice
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7. Ensure that all incomplete records have been open for at least 15 days.

a. Under the “Not Yet” status of the individual audit line, select [View](#).

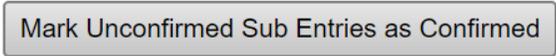


b. On the bottom of the left side of the audit, locate the response date. This is the date the prime or higher tier sub reported the payment. Note whether the report was submitted more than 16 days ago.

Response Date	Local: 5/2/2018 9:25:09 AM MDT System: 5/2/2018 10:25:09 AM CDT
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c. Repeat this process for all incomplete lines.

8. If all lines were reported more than 16 days earlier, select **Mark Unconfirmed Sub Entries as Confirmed**.



9. If any line was reported less than 16 days earlier, DO NOT close the audit. All subs must have 15 days to respond to a report according to our contract.

10. Please note, this process only applies to incomplete responses. There is no equivalent process for incomplete reporting. Reporting by the Prime and all Subprime Contractors is a condition of payment.



Review Discrepancies

- From the Contract Audits in your Dashboard, select the red number in the “Discrepancies” line.

<u>Contract Audits</u>	Total	< 90 days	> 90 days
Total Audits	1913	468	1445
Incomplete Audits	468	228	240
Discrepancies	28	8	20
Closeouts/Final	27	16	11
Past Due Audits	28	14	14
Sub Requests - New	2	2	0

- Ensure the assignment check box is unchecked.

Show ONLY records assigned to you

- In the list that comes up, use the drop down menus to filter the audits by month and status.

to resort click on column title, to filter click on the drop down menu

Reporting Status	Audit Period	Contract
Discrepancy	Mar-2018	
1 Discrepancy Pending sub (3)	<u>March 2018</u>	C21327

- Use the table to the right to determine which month you should filter by to clean up older audits.
- Filter by discrepancy to find unresolved discrepancies.
- Click the blue, underlined audit period to enter the audit (see image from step 3).
- In the Subcontractor Payment section, locate the payments that say “Discrepancy” and select “Resolve.” Note, clicking this link will not automatically resolve the discrepancy.

On the 30 th of...,	filter By....
January	November
February	December
March	January
April	February
May	March
June	April
July	May
August	June
September	July
October	August
November	September
December	October

\$90,395.75	Discrepancy
Resolve	Resolve
Prompt: Yes	Prompt: N/A

- Review any available responses in the Discrepancy Resolution Data Reported Section

Discrepancy Resolution Data Reported	
New Amount Reported by Prime	No response yet.
New Amount Reported by Subcontractor	No response yet.

- Based on the responses provided, determine who should be involved in resolving the audit and what information is required.



Resolving Discrepancies

When a lower tier subcontractor or supplier reports a discrepancy (i.e. disagrees with a payment amount reported by a higher tier contractor) CDOT, the prime contractor, and the subcontractor who reported a discrepancy will be notified of the issue. All parties should login to the system to investigate the discrepancy. No matter who reports the payment or discrepancy, the parties involved in resolving it are the reporting sub, the prime contractor, and the CDOT Project Engineer.

Accessing and Responding to the Discrepancy

1. Login to the B2G System at <http://contracts.codot.gov/>



2. On the home screen, find Audit Discrepancies in your Dashboard and click on the red number.

Contract Audits	Total	< 90 days	> 90 days
Total Audits	9	4	5
Incomplete Audits >	1	1	0
Audit Discrepancies >	1	1	0

3. Click on “# Discrepancy” in the left-most column of the Audit you wish to complete

To **resort** click on column title. To **filter** click on the drop down menu.

Status	Audit Period	
Discrepancy ▾	All ▾	All ▾
1 Discrepancy	December 2017	000010: R1 Test

Note: You may also enter the Audit through an individual contract. If you do, the Audit List will look like the following. To enter the Audit from this screen, select “View Audit” on the far right.

4. In the Audit Actions Section, select “Resolve # discrepancies”



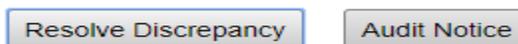
Confirmed by Sub
Rejected Resolve Discrepancy
Rejected Resolve Discrepancy

5. In the Subcontractor Payment section, locate the payments that have been rejected and select “Resolve discrepancy.” Note, clicking this link will not automatically resolve the discrepancy.

6. Review any available responses in the Discrepancy Resolution Data Reported Section

Discrepancy Resolution Data Reported	
New Amount Reported by Prime	No response yet.
New Amount Reported by Subcontractor	No response yet.

7. At the top of the screen, select “Resolve Discrepancy,” complete the required fields, then click “Save Response.”





Resolving the Discrepancy

Discrepancies happen for one of two reasons. Either one party made a reporting error or the lower tier subcontractor is trying to notify CDOT of a payment issue. The discrepancy is the way in which a subcontractor can ask for CDOT’s help in resolving a payment issue or potential prompt pay violation. These discrepancies should therefore be taken seriously. Keep in mind, if at any point the two contractors come to an agreement on the discrepancy, the record is no longer discrepant.

1. Follow the steps above to access the discrepancy.
2. Review the responses from both the prime contractor and the subcontractor. If either party has not yet responded, you will need to contact that contractor. The sub must make private comments to you when flagging the payment and each party must provide comments with its response. Therefore, when the audit is ready for your review, you will have one or two sets of comments from the sub and one set of comments from the prime.
3. If the responses give you enough information to resolve the discrepancy, you may do so. If not, you may need to contact one or both parties for more information.
4. When you are ready to resolve the discrepancy, select the option that shows the dollar amount released to the sub during the calendar month of the audit period. Enter public comments to indicate how and why you resolved the discrepancy as you did. Add any relevant attachments.

*** required entry**

Select a resolution option, review/update/add other required information, enter comments if needed, and click **Save Response**. You can respond to this discrepancy notice once. Further changes must be processed by the compliance officer.

Discrepancy Resolved? *

YES - the \$70,000.00 originally reported by the prime is correct.
 YES - the \$0.00 originally reported by the subcontractor is correct.
 NO - none of the amounts are correct.

Public Comments

These comments are visible to the compliance officer and the prime contractor.

Private Comments

These comments are visible ONLY to the compliance officer.

Attach File(s)

Confirmation

Send me confirmation of my response.

[Cancel](#)

Please note, in the event payment was released to the sub at the end of one month and not received by the sub until the next calendar month, it does not really matter which month is used to record the audit as long as the payment ends up in the system. However, if this issue starts to demonstrate a larger issue of delayed payment or bad faith practices, consult your civil rights specialist.

A note about resolving discrepancies:

As the PE, your role in this process is twofold. First, your job is to ensure the subcontractor’s issue is acknowledged. Second, your job is ensure the system stays as accurate as possible. Therefore, when you resolve the audit, you should reflect the payment amount and date that actually occurred during the calendar month of the audit period. You will use the comments section to record the steps you took in resolving the audits and the resolution you came to. Please contact your civil rights specialist for more guidance on resolving discrepancies.



Confirm Prompt Payment Reporting

- From the Contract Audits in your Dashboard, select the red number in the “Incomplete Audits” line.

Contract Audits	Total	< 90 days	> 90 days
Total Audits	1913	468	1445
Incomplete Audits	468	228	240
Discrepancies	28	8	20
Closeouts/Final	27	16	11
Past Due Audits	28	14	14
Sub Requests - New	2	2	0

- Ensure the assignment check box is unchecked.

Show ONLY records assigned to you

- In the list that comes up, use the drop down menus to filter the audits by month and status

Reporting Status	Audit Period	Contract
Pending All	Mar-2018	
Pending sub (4)	<u>March 2018</u>	C20819
Pending prime (3) Prime past due	<u>March 2018</u>	18-HAA-XB-00085 T/O 1

- Use the table to the right to determine which month you should filter by to clean up older audits.

On the 16 th of...	filter By...
January	November
February	December
March	January
April	February
May	March
June	April
July	May
August	June
September	July
October	August
November	September
December	October

- Filter by pending status to find only open audits.

- Pending Prime: Not all contractors have reported. The number in parenthesis shows you how many lines are incomplete.
- Pending Sub: Not all contractors have responded to the audit. The number in parenthesis shows you how many lines are incomplete.
- Prime Past Due: Reporting deadline has past. Not all contractors have reported.
- Pending all: shows all open audits.

- Click the blue, underlined audit period to enter the audit (see image from step 3).

- Review the subcontractor due date report in the CRS System Resources folder to find the report for the contract and audit period. This report is sorted by region, then contract, then month.

Region 1

C19487

October 2017



8. Compare the due dates in the report with the incomplete (“Not Yet”) records in B2G.

March 2018				
3/1/2018	Alpha & Omega Consultants, Inc.	4/13/2018	Not Yet	4/28/2018
3/1/2018	Blas Chavez Trucking, Inc	4/19/2018	Not Yet	5/4/2018
3/1/2018	Collective Marketing + Communications	4/13/2018	Not Yet	4/28/2018
3/1/2018	JK Transports Inc.	4/19/2018	Not Yet	5/4/2018
3/1/2018	Scooby's Trucking LLC	4/19/2018	Not Yet	5/4/2018

9. Verify that all contractors listed as “Not Yet” are listed on the Subcontractor Due Date Report.

1	Alpha & Omega Consultants, Inc. [Info] Dan Trujillo P 303-467-1700, F 303-467-1100	\$0.00 View Edit Prompt: Yes	Not Yet View Edit Resend Notice
1	Cascade Environmental, Inc. [Info] Jonathan Spencer jrs6@comcast.net P 303-948-0008, F 720-746-6389	\$2,687.00 View Edit Prompt: Yes	Confirmed View Edit Prompt: N/A
1	Collective Marketing + Communications [Info] Emily Wilfong emily@involvecollective.com P 703-472-2935	\$888.34 View Edit Prompt: Yes	Not Yet View Edit Resend Notice

10. If all incomplete (“Not Yet”) records in B2G are past due based on the subcontractor due date report, click **Mark Unconfirmed Sub Entries as Confirmed** to close the audit.

Mark Unconfirmed Sub Entries as Confirmed

If there were delays in the reporting phase of the audit such that the subcontractor records are not past due, do not close the audit. You may either close the past due records individually, or you may wait until all subcontractor records on the audit are past due.

11. To close an individual subcontractor record

a. Under the “Not Yet” status of the individual audit, select **Edit**.



b. Complete the audit response form assuming the Prime reported the payment correctly. Save the audit.



Review Incomplete Audits

12. From the Contract Audits in your Dashboard, select the red number in the “Incomplete Audits” line.

Contract Audits	Total	< 90 days	> 90 days
Total Audits	1913	468	1445
Incomplete Audits	468	228	240
Discrepancies	28	8	20
Closeouts/Final	27	16	11
Past Due Audits	28	14	14
Sub Requests - New	2	2	0

13. Ensure the assignment check box is unchecked.

Show ONLY records assigned to you

14. In the list that comes up, use the drop down menus to filter the audits by month and status

Reporting Status	Audit Period	Contract
Pending All	Mar-2018	
Pending sub (4)	<u>March 2018</u>	C20819
Pending prime (3) Prime past due	<u>March 2018</u>	18-HAA-XB-00085 T/O 1

15. Use the table to the right to determine which month you should filter by to clean up older audits.

16. Filter by pending status to find only open audits.

- Pending Prime: Not all contractors have reported. The number in parenthesis shows you how many lines are incomplete.
- Pending Sub: Not all contractors have responded to the audit. The number in parenthesis shows you how many lines are incomplete.
- Prime Past Due: Reporting deadline has past. Not all contractors have reported.
- Pending all: shows all open audits.

On the 16 th of...	filter By...
January	November
February	December
March	January
April	February
May	March
June	April
July	May
August	June
September	July
October	August
November	September
December	October

17. Click the blue, underlined audit period to enter the audit (see image from step 3).

18. Review the subcontractor due date report in the CRS System Resources folder to find the report for the contract and audit period. This report is sorted by region, then contract, then month.

Region 1

C19487

October 2017



19. Compare the due dates in the report with the incomplete (“Not Yet”) records in B2G.

March 2018				
3/1/2018	Alpha & Omega Consultants, Inc.	4/13/2018	Not Yet	4/28/2018
3/1/2018	Blas Chavez Trucking, Inc	4/19/2018	Not Yet	5/4/2018
3/1/2018	Collective Marketing + Communications	4/13/2018	Not Yet	4/28/2018
3/1/2018	JK Transports Inc.	4/19/2018	Not Yet	5/4/2018
3/1/2018	Scooby's Trucking LLC	4/19/2018	Not Yet	5/4/2018

20. Verify that all contractors listed as “Not Yet” are listed on the Subcontractor Due Date Report.

1	Alpha & Omega Consultants, Inc. [Info] Dan Trujillo P 303-467-1700, F 303-467-1100	\$0.00 View Edit Prompt: Yes	Not Yet View Edit Resend Notice
1	Cascade Environmental, Inc. [Info] Jonathan Spencer jrs6@comcast.net P 303-948-0008, F 720-746-6389	\$2,687.00 View Edit Prompt: Yes	Confirmed View Edit Prompt: N/A
1	Collective Marketing + Communications [Info] Emily Wilfong emily@involvecollective.com P 703-472-2935	\$888.34 View Edit Prompt: Yes	Not Yet View Edit Resend Notice

21. If all incomplete (“Not Yet”) records in B2G are past due based on the subcontractor due date report, click **Mark Unconfirmed Sub Entries as Confirmed** to close the audit.

Mark Unconfirmed Sub Entries as Confirmed

If there were delays in the reporting phase of the audit such that the subcontractor records are not past due, do not close the audit. You may either close the past due records individually, or you may wait until all subcontractor records on the audit are past due.

22. To close an individual subcontractor record

a. Under the “Not Yet” status of the individual audit, select **Edit**.



b. Complete the audit response form assuming the Prime reported the payment correctly. Save the audit.



Review Discrepancies

- From the Contract Audits in your Dashboard, select the red number in the “Discrepancies” line.

Contract Audits	Total	< 90 days	> 90 days
Total Audits	1913	468	1445
Incomplete Audits	468	228	240
Discrepancies	28	8	20
Closeouts/Final	27	16	11
Past Due Audits	28	14	14
Sub Requests - New	2	2	0

- Ensure the assignment check box is unchecked.

Show ONLY records assigned to you

- In the list that comes up, use the drop down menus to filter the audits by month and status.

to **RESORT** CLICK ON COLUMN TITLE. to **FILTER** CLICK ON THE DROP DOWN MENU.

Reporting Status	Audit Period	Contract
Discrepancy	Mar-2018	
1 Discrepancy Pending sub (3)	<u>March 2018</u>	C21327

- Use the table to the right to determine which month you should filter by to clean up older audits.
- Filter by discrepancy to find unresolved discrepancies.
- Click the blue, underlined audit period to enter the audit (see image from step 3).
- In the Subcontractor Payment section, locate the payments that say “Discrepancy” and select “Resolve.” Note, clicking this link will not automatically resolve the discrepancy.

On the 30 th of...,	filter By....
January	November
February	December
March	January
April	February
May	March
June	April
July	May
August	June
September	July
October	August
November	September
December	October

\$90,395.75	Discrepancy
Resolve	Resolve
Prompt: Yes	Prompt: N/A

- Review any available responses in the Discrepancy Resolution Data Reported Section

Discrepancy Resolution Data Reported	
New Amount Reported by Prime	No response yet.
New Amount Reported by Subcontractor	No response yet.

- Based on the responses provided, determine who should be involved in resolving the audit and what information is required.



Release Subcontractor

- From the Navigation Menu, select **Search >> Contracts**

- Enter the five-digit CDOT contract number, title, or contractor, then click **Search**.
- Click the contract number next to the contract you want to review
- Once in the contract, navigate to the Subs tab

- Select **Edit** on the far right for the subcontractor you wish to release.
- In the settings menu, select **Yes**; if any lower... in answer to the question Final Payment Made.

- At the bottom of the record, click **Review**, then click **Save**.



Project Closeout

Semi-Final Estimate

1. Use the **Search >> Contracts** feature to locate the contract you are evaluating.
2. Once in the contract, navigate to Compliance Audit List to check the status of the most recently recorded Audit:



- a. View any audits with red lines to close incomplete audits and resolve remaining discrepancies.

Not Confirmed By Sub		Disputed By Sub		Date Posted	Actions
Lines	Amount	Lines	Amount		
9	\$545	2	\$44,086		
2	\$545	0		\$0	5/2/2018 View Audit
0	\$0	0		\$0	4/2/2018 View Audit
1	\$0	0		\$0	3/1/2018 View Audit
0	\$0	1	\$33,851	2/1/2018	View Audit
1	\$0	0		\$0	1/1/2018 View Audit
1	\$0	1	\$10,235	12/1/2017	View Audit
1	\$0	0		\$0	11/1/2017 View Audit
1	\$0	0		\$0	10/2/2017 View Audit
1	\$0	0		\$0	9/1/2017 View Audit
1	\$0	0		\$0	8/30/2017 View Audit

- b. Compare the payment data in the Closeout tab against the amount paid to date on the semifinal estimate. If the amounts do not match, review the progress payments and correct the errors.

Compliance Audit List		
Audit Period	Status	Paid To Prime
TOTALS		\$779,367

- c. Check the “final” status of the last audit by clicking [View Audit](#) from the audit list.
 - i) If the Prime marked the Audit as final, ensure that all tiers would have been reported on that audit by looking at the date of the last progress payment in Site Manager and allowing 10 days per tier for prompt(ish) payment. Unmark the audit as needed.
 - ii) If the Prime did not mark the most recent audit as final, look at the date of the last progress payment in Site Manager and allow 10 days per tier for prompt(ish) payment to determine the appropriate last audit. Mark the audit as final as appropriate. Mark the audit final as needed.



3. Navigate to the closeout tab

Main	View	Settings	Subs	Docs	Change Orders & Task Orders	Alerts	Comments	Messages	Closeout
Compliance Audit List	Compliance Audit Summary	Compliance Audit FY	Reviews	Site Visits	Reports				

- a. Check the contract status for any incomplete audits or unresolved discrepancies. Return to the Compliance Audit List tab to close audits or resolve discrepancies.

Close Contract	
Contract Status	Open; 9 compliance audit(s) with incomplete data and/or discrepancies
Close Date *	<input type="text"/> (mm/dd/yyyy)

- b. Review the Audit Summary - Total Contract section
 - i) Compare the payment data in the Closeout tab against the amount paid to date on the semifinal estimate. If the amounts do not match, return to the Compliance Audit List tab, review the progress payments, and correct any errors.

Payments	Payments Percent	Difference (Payments - Award)
\$779,366.76		
\$80,137.05	10.282%	10.282% above goal
\$80,137.05	10.282%	10.282% above goal
\$0.00	0.000%	Goal matched

- ii) Review progress toward the DBE goal. Determine disincentive, if any, tied to failure to meet the DBE or ESB goal.

c. Review the Subcontractors section

- i) Based on the Utilization Plan or any applicable 1420s, review the Actual Amount paid to any committed subcontractors. Determine disincentive, if any, tied to failure to meet commitments.
- ii) Review any reported retainage. If retainage owed to DBEs is being withheld, you may contact the Prime and ask that they release it.

Actual Amount	Unpaid Retainage	Actions
\$10,050.00	\$0.00	Print Letter
\$77,977.05	\$0.00	Print Letter

Final Estimate

1. Use the **Search >> Contracts** feature to locate the contract you are evaluating.
2. Once in the contract, navigate to the closeout tab



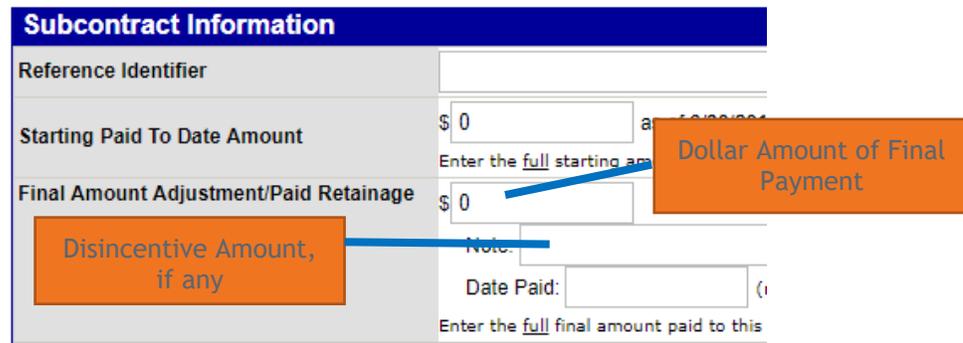
3. In the Prime Contractor section, click the name of the Prime Contractor



4. In the last row of the Contract Payment Details section, select **Edit** to input the final retainage payment.



5. In the subcontract Information section, input the Final Amount Adjustment/Paid Retainage



6. Change Settings to reflect that final payment was made.



7. Complete the Additional Information Section as normal. Work type will likely be Management (Construction). Commitment fields may be left blank.
8. Click **Review**, then click **Save**.



9. Return to the Closeout tab

Main	View	Settings	Subs	Docs	Change Orders & Task Orders	Alerts	Comments	Messages	Closeout
Compliance Audit List	Compliance Audit Summary	Compliance Audit FY	Reviews	Site Visits	Reports				

10. In the Close Contract section, enter the date the contract was closed in Site Manager.

Close Date *	<input type="text"/> (mm/dd/yyyy)
Contract Secondary Status	None selected ▼
Prime Contractor Rating	Not Rated ▼
Closeout Comments	<input type="text"/>

Click Close Out Contract.

Close Out Contract



Review Add Subconsultant Requests

- From the Contract Audits in your Dashboard, select the red number in the “Sub Requests - New” line.

Contract Audits	Total	< 90 days	> 90 days
Total Audits	1913	468	1445
Incomplete Audits	468	228	240
Discrepancies	28	8	20
Closeouts/Final	27	16	11
Past Due Audits	28	14	14
Sub Requests - New	2	2	0

- Ensure the assignment check box is unchecked. Show ONLY records assigned to you
- In the Actions column for a new request, select [View](#).
- Review the information in the record. If the firm is DBE certified, verify the utilized codes. If you approve the request, you will have a chance to edit any information related to counting, inclusion in the audits, etc.

- At the top or bottom of the screen, click **Approve Request**.



- Verify all subcontractor settings.

Settings	
Include in Compliance Audits? *	<input checked="" type="radio"/> Yes - subcontractor is active and should be included in the p <input type="radio"/> No - subcontractor is inactive.
Count Towards Certified Goal *	This setting is used only to set the default status on future complian <input type="radio"/> Yes - Payments to this contractor count towards the selected <input checked="" type="radio"/> No
Goal Type	None selected ▾
Add vendor to existing compliance audits for this contract? *	<input checked="" type="radio"/> Yes - add this subcontractor to all audits going back to the pr <input type="radio"/> No. subcontractor's first compliance audit will be the next on
Final Payment Made? *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Subcontract Award Date	1/16/2018 (mm/dd/yyyy)
Work Start Date	1/17/2018 (mm/dd/yyyy)
Work End Date	10/1/2018 (mm/dd/yyyy)
Work Description	Data Collection
Work Codes	Currently assigned work codes: No Codes Assigned <input type="button" value="Add Work Codes"/> Click here to see if there are any available work codes assigned to
Graduation Phase-Out *	100.00 % Phase-out instructions

- Complete Additional Information section as usual. Click review, then click save.