Professional Service Contracts and B2GNow System Training Participant Guide

CDOT Project Staff and Civil Rights Offices

September 2021

CDOT Civil Rights Home Business Resource Center
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V 3.0
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Civil Rights Contacts

This manual has been produced by CDOT’s Civil Rights Home Business Resource Center (CRBRC), the Headquarters Civil Rights Office. The CRBRC is responsible for developing Civil Rights programs and monitoring compliance administration.

Civil Rights and Business Resource Center
General Line | (303) 757-9234

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The CRBRC works in collaboration with the Region Civil Rights Offices (RCROs), who oversee civil rights compliance during active design and construction.

Region 1: Patty Bowling, Region Civil Rights Manager (Denver)
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Region 2: Sara Rose, Region Civil Rights Manager (Pueblo)
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Region 3: Karl Lehmann, Region Civil Rights Manager (Grand Junction)
karl.lehmann@state.co.us | (970) 683-6211

Region 4: Juliet Sheets, Region Civil Rights Manager (Greeley)
juliet.sheets@state.co.us | (970) 350-2156

Region 5: Jason Benally, Region Civil Rights Manager (Durango)
jason.benally@state.co.us | (970) 385-1403

For questions regarding the B2GNow software system, contact the B2GNow Help Desk: support@b2gnowsupport.com | (602) 490-0809
Acronyms

APP - Anticipated Participation Plan
B2GNow - Civil Rights System to track DBE and prompt payment contracts and projects
CDOT - Colorado Department of Transportation
C/O - Change Order
CR - Civil Rights
CRBRC - Civil Rights & Business Resource Center (HQ)
CRO - Civil Rights Office
DBA - Doing Business As
DBE - Disadvantaged Business Enterprise
ESB - Emerging Small Business
GFE - Good Faith Effort
LOI - Letter of Intent (Vendors)
MC - Master Contract
OA - Operating Agreement
NAICS - North American Industry Classification System Work Codes
NPS - Professional Services Consultant Non Project Specific Contracts
NTP - Notice to Proceed
NTE - Not to Exceed
PCW - Project Cost Worksheet
PGS - Professional Services (Consultant) Program Specific Contracts
PS - Professional Services (Consultant) Project Specific Contracts
RCRO - Region Civil Rights Office
RFP - Request for Proposal
SOI - Statement of Interest
SOW - Scope of Work
T/O - Task Order
UP - Utilization Plan
Common B2GNow Questions

What does B2G stand for?
B2GNow stands for Business 2 Government Now. It is an international software company based in Phoenix, Arizona.

Why is CDOT using the B2GNow system?
For professional services, the B2GNow system assists CDOT with tracking DBE and ESB participation and prompt payment for all consultants.

Are we required to use B2GNow for CDOT Projects?
All Professional Service contracts use B2GNow. It has been a requirement in the Contract Requirements since July 16, 2016. B2GNow is also used for construction projects. As of January 1, 2022, all local agency professional service and construction projects will be required to use CDOT’s B2GNow system.

How can a prime use the B2GNow system to keep track of who is a new relationship for proposal scoring?
Every user associated with the Consultant can access the Consultant’s current and past contracts. The new relationship is documented in the notes of the contract. However, it is suggested that Consultants establish internal tracking systems.

What should be entered for the NTP (Notice to Proceed) date for task order contracts? Is it the contract start date?
If you don’t have the actual NTP date, contract start date is fine. If you don’t know the contract start date, use the award date.

Do suppliers need to be in B2GNow?
Yes, firms need to report payments to suppliers like they must do for your subs. Supplier/vendors show up like any other subs in the reporting, but they are designated as a “supplier” in the participation type.

Should we be entering vendors (as subs) in B2GNow?
Yes, vendors are considered subs per the DBE regulation. Please select sub as the participation type.

If the DBE contractor identified in the UP (Utilization Plan) has been replaced for one reason or the other, what is our process and procedure for removal of the firm or replacement in B2GNow?
Discussions and a Professional Services DBE Participation Plan Modification Request form is submitted to Civil Rights.

I am a DBE Prime. How do I include myself as a DBE for credit toward the goal?
If a DBE Prime is awarded a contract, they will not set themselves up as a DBE when setting up
the Utilization Plan. They will contact Civil Rights to be set up as a subcontractor as a Self Performing Prime.

A rental company is included on the project. Should a rental company that is renting out equipment (more than $10,000) be included in B2GNow? Yes.

Are supplier/vendors listed as “Tier 2” subs under the company who is purchasing the supplies? Or are they Tier 1 under the prime? Yes. Supplier/vendors are listed as tiered subs under the firms who are purchasing supplies.

What needs to be completed under ‘Additional Information’ when adding a subcontractor?

a. ESB (required) - Yes if the firm is ESB certified. No if the firm is not ESB certified. Check the applicable certifications section of the add sub form to find out.

b. Level 1 (required) - If the firm is not ESB certified, select “No”. If the firm is ESB certified, check the directory to determine the firm’s ESB level. If level 1, select yes. If level 2, select no. If SBE level, select no.

c. New Teaming Partner (required) - Select “No” for all subs on construction projects. That field should have been pre-filled by the CRBRC for any design contracts.

d. Work Type (required) - select the best option.

What is the process in B2GNow if a prime added a sub, but never utilizes the firm? The sub will remain listed on the contract and receive monthly audits until either the contract ends or the final audit box is checked.

Are we supposed to mark DBEs as “count towards the goal” for State-Funded task orders? Yes. All DBEs no matter the funding need to be marked as “count towards the goal”. State funded contracts are included. This information will be essential for CDOT to a disparity study and track race conscious and race neutral participation.

What is race conscious and race neutral?
Race Conscious: DBE participation used on projects that counts toward the DBE goal/commitment set for the contracts.
Race Neutral: DBE participation used on projects that do not count toward participation of the DBE goal on contracts.

Now that CRBRC is importing task order records from SAP, is there anything we should be entering in the B2GNow system on professional contracts? Yes. CDOT Civil Rights will enter information on amended funds and/or time extension of contracts to the task order or master contract after execution via the Change Orders & Task Orders tab. However, the prime consultant will add subs on the Subs tab.

a. Prime adds sub requests. The prime will add the new sub through the subs tab of the
task order with the amended contract attached in the documents. CDOT Civil Rights will add it to the master contract.

b. CDOT adds funds requests. These should be entered as change orders to the relevant task order through the Change Orders & Task Orders tab

c. CDOT adds time extension requests. These should be entered as change orders through the Change Orders & Task Orders tab of the relevant task order and/or the master contract as appropriate

d. CDOT adds fund reallocation requests. These should be entered by adjusting the contract amounts in the subs tab to reflect the amended project cost worksheets

e. CDOT changes DBE goal approved changes

What date should the prime use when reporting payment to sub and supplier/vendors in B2GNow?
Firms should use the date they released the payment to the sub or supplier/vendor. It is okay if the sub reports a different date because of a delay in processing time. It is recommended that firms report the check date of the payment. CDOT trains the subs not to mark a payment as discrepant solely because of the date reported.

When CDOT Civil Rights sees a new task order, can the default setting in the Compliance Audit settings be changed?
A task order’s default will be “Automatically” since payments apply to them. The master contract setting is set to “On Demand” because CDOT does not want an audit on master contracts. A setting may be changed by Civil Rights under the correct circumstance.

What if I am paid $0 for the month? Can I ignore the audit?
No! If a firm is paid $0, it should be reported or confirmed as $0.

Why am I receiving audits when I haven’t even started the work?
Once the task order is uploaded in the B2GNow system, it assumes that work will begin. You may report and confirm as $0 if paid $0. Civil Rights can put in the Notice to Proceed (NTP) date and then the audits will not begin until that day. Civil Rights can also change the setting to “On Demand”. However, they will need to change the setting back to “Automatically” once work begins.

What do I do with subs audits when all the work has been completed and payments were made?
Once the sub has been paid completely for the project (even if that is $0), mark as "final audit" to remove the firm from future compliance audits. You may mark as final payment made. If you choose, you can use the original and current commitment fields to indicate the changed commitment.

Can firms edit audits after their original response?
No. They will have to contact CDOT Civil Rights to make any corrections to audits. There is no mechanism in the system to allow firms to edit audits after they have been confirmed.
How do you handle a sub requesting to be removed from audits?

a. Confirm with the sub the dollar amount they were paid on the project (even if your records indicate they were paid $0).
b. Verify with the subs that all payments (and any retainage) have been received by the sub.
c. Confirm final payment received by the sub. Enter that amount as the final payment in the sub’s profile.
d. Confirm with the prime that the sub has been paid in full for their work on the project.
e. Remind the prime and sub that any future work on the project by the sub will require a new subcontract.
f. Check the final audit box in the last audit to stop future audits.

When deleting a document, there is an automatic email to B2GNow. B2GNow responds within 24 hours saying to contact CRBRC. Is there a way to redirect the email to CRBRC? The automatic email occurs because you do not have the permission to delete documents in the system. Do not try to delete docs or contracts in B2GNow. The automatic emails are support requests, and there is no way to stop them from going to B2GNow. If you need to remove a document, please request it through the CRBRC at (303) 757-9234 to delete the document. We will work on a more sustainable fix in the longer term.

How do I get project personnel set up in B2GNow?
Please contact the CRBRC at (303) 757-9234 for CDOT project personnel and consultant additions.
Summary of CDOT Professional Services Small Business Requirements on Contracts

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Existing contracts follow the requirements in the contract

https://codot.gov/business/civilrights
CDOT Design & Engineering Contract Process

CDOT uses B2GNow software to track small business participation on professional services contracts. This user manual will show you how to use B2GNow software to ensure compliance on your CDOT project. For an overview of the entire process, please click on the object below.

Information regarding step 4 (Affidavit), step 5 (Scoring), and step 6 (Utilization Plan), are included with the B2GNow manual, videos and forms in the following link: https://www.codot.gov/business/civilrights/compliance/prof-services/resources-forms
Navigate 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 the Professional Services DBE and Prompt Payment related tracking requirements for participating on a CDOT project.

NOTE: B2GNow relates “subcontractor” and “vendor” to any sub, as a contractor, consultant or supplier/vendor
Create an Account in B2GNow

B2GNow is a national database used by several dozen state and local agencies. The nationwide registry holds over 200,000 vendor accounts. Once a username and password has been created, you can be used to log in to any B2GNow portal around the country. All firms working on federally assisted CDOT projects should have a B2GNow account. Firms that prequalified with CDOT, or who have DBE/ESB certification will have B2GNow accounts with the prequalification or certification process. Usernames are usually the e-mail address used during the prequalification or the certification process. B2GNow portals typically have web addresses such as denver.mwdbe.com or cdot.dbesystem.com. The web address for CDOT is: https://cdot.dbesystem.com.

The Civil Rights and Business Resource Center (CRBRC) 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 at (303) 757-9234.

Vendor Accounts

A vendor account is like a virtual directory posting for your business. The system collects general information about your company that any user in the country with a B2GNow Account can find. This general information can include the business name and DBA (Doing Business as), hours of operation, its web address, its physical address and phone number, its primary work areas, etc. Vendor accounts can also hold semiprivate information that is only accessible to those users connected to the company.

Locate an Existing Vendor Account

Before you get started, check if your business has an existing account

On the left side of the Log In page, click “Account Lookup”

Enter your business name (less reliable due to variations), Tax ID Number, or B2GNow Vendor Account Number (preferred)

Click “Search”
All Internal Users

If your company appears in the search results, close the Account Lookup window. Your company already has a vendor account. Continue to “User within Accounts” of this guide.

If your company does not appear in the search results, close the Account Lookup window. Your company does not have a vendor account. Continue to “Create a New Vendor Account”.

Note Your Vendor Account Number

Each individual firm will have their own unique system vendor account number. Make note of your firm’s vendor number as you may need to supply your prime with it. The vendor number will be required on the monthly billing the prime submits on the CDOT Form 1313 - Consultant Monthly Invoice Cover Sheet.

Search the vendor. Click Search>>Vendors

To see details of the account, click on the underlined “Go To”

Search>Vendors>Type in Vendor number
Create a New Vendor Account

Before getting started, check if your firm has an existing account. Duplicate vendor accounts are a common issue.

**NOTE:** Creating a new Vendor Account by clicking “Prequalify” will take you to the Questionnaire Menu.

Click “Create Account”

Complete all required (*) fields in Sections 1, 2, and 3. In Section 4, enter the email address and create a password for the company’s primary contact

Click “Next”

The system will give you a red or yellow warning if any information in your profile is completely or partially matched another profile

If the warning is yellow, review the list of partial matches to ensure that none of the profiles belongs to your company

Click “I would like to create an account in this system”

Click “Next”

If the warning is red, you have entered information that exactly matches an existing profile

**NOTE:** Note your vendor number for your account as this will be used on the CDOT Form 1313 - Consultant Monthly Invoice Cover Sheet for Professional Services billing

Return to Account Lookup to locate your firm’s account. Contact the CDOT Civil Rights and Business Resource Center at (303)757-9234 if you have questions.
Multiple Vendor Account Numbers

There are times different users will set up an account for their firm more than once. If you find your firm has multiple accounts set up, you can request to have the accounts merged. Firms can contact the B2GNow support team, support@b2gnowsupport.com | (602) 490-0809. and provide the vendor numbers, name of firm(s) and contact info to have the accounts merged.

Reset Password

Prompted B2GNow emails from CDOT originates from Civil Rights. The username will be the email address receiving those emails. If you are unsure of your password or whether your email address connects to a B2GNow account, continue steps.

On the left side of the Log In page, click “Forgot Password”

Enter your email address in the popup box

Click “Submit”

NOTE: If your email address is not connected to a user account, you will see a popup at the top of the page

If you receive this message, see “Creating a New User Account”

If your email address is connected to an account, you will receive the following email containing your temporary password

Log in to the system using the username and password

Follow instructions to change your password

B2GNow passwords must be six (6) characters long and DO NOT expire
All Internal Users

Users Within Accounts

Within each overarching vendor account, there are a number of user accounts. User accounts are tied to individuals and their email addresses and allow the user full access to any information linked to the company’s vendor account. Every vendor account must have at least one user.

Find Existing Users from Account Lookup

If you are unsure of who at your company has access to B2GNow, use the Account Look up feature to find a list of the firm’s primary users. Be sure you choose your correct address.

On the left side of the Log In page, click “Account Lookup”

Enter your business name (less reliable due to variations), Tax ID Number or B2GNow Vendor Account number (preferred)

Click “Search”

If you are trying to determine whether a specific individual has access, you can also add the person’s first or last name

Create a New User
(CRBRC Only for CDOT Personnel and Project Personnel)

In order to create a new user for project personnel (CDOT or Consultant Engineer), contact the CRBRC (303) 757-9234. Consultant and supplier/vendors can request to be added to a firm’s vendor account. Only existing users linked to a company’s vendor account can create or authorize new user accounts. An existing user within the firm must approve these requests.

Request New User Without Logging In

Anyone can request to add a new user to a company’s account. These requests are subject to approval by a company’s contact.
On the left side of the Log In page, click “Account Lookup”

Enter your business name (less reliable due to variation), Tax ID Number or B2GNow Vendor Account Number (preferred)

Click “Search”

If your company does not appear in the search results, close the account lookup window. Your company does not have a vendor account. Return to the “Creating New Vendor Account” section of this guide to learn how to create a new account.

If your company appears in the search results, your company has a vendor account

Click “Request New User for This Entity”

Complete all required (*) fields, check the box at the bottom of the screen, type your name in the box at the bottom of the screen

Click “Submit”

Add New User from Inside the System (Once Logged in)

Any user linked to the company’s account can add new users. This method is the easiest way to create a new user. A new user can only be set up by existing users within your firm.

On the left side of the page after logging in, click Settings > Add a User

A list of the users linked to the company’s vendor account will popup

At the top of the page, click “Add User”

Complete all required (*) fields

Click “Save” at the bottom of the screen

NOTE: You will need to assign the new user a temporary password. The new user will have to change their password upon logging in for the first time.
User Changes

CDOT can assist and edit profile information for a firm’s user. Civil Rights can also reset a user’s password. To deactivate a user, please contact B2GNow support desk at support@b2gnowsupport.com, (602) 490-0809, and provide the vendor number, name of firm and contact info.

Home Screen and Dashboard

When logged into B2GNow, a dashboard will display your firms’ contracts. Items requiring your response are flagged in red font. Your Dashboard contains quick links and “to dos” separated and based on the modules in the system. From this launching point, you can 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.

Home Screen/Navigation Menu

View Menu

- View a list of certified firms
- View a list of all your viewable contracts
- View all recent prompt payment contract audits
- For Preconstruction, view pending sub requests
- For Preconstruction, view list of accessible projects
- View list of email outreach campaigns
- View list of B2GNow managed events
- View pre created vendor lists for outreach purposes
- View list of all advertised projects (past and future)
- View all visible pending and approved utilization plans
- View pending and past certification applications
- View received certification applications
- View requests to update general certification information
- View of list of firms with pending or approved questionnaires
- View active bid plans
- View support queue
- View system messages

Search Menu

- Search all vendors in the national B2GNow database
- Search all vendors with a certification recognized by CDOT
- Search staff or vendor users by contact information
- Search contracts by number, prime/sub, etc.
- Search for specific ad documentation/utilization plans
All Internal Users

Settings Menu

- Change password
- Change your phone number, email address, name, etc.
- Change company address, main contact information, etc.
- Update hours of operation, general description, industry, etc.
- See all user associated with your company’s vendor profile
- Add a new user to your company’s vendor profile

Reporting, Create Menu
(CDOT Only)

- Access full list of available reports
- Create new contracts, proposals, projects, vendor lists, etc.
- Switch between linked accounts

Help and Support
(For the B2GNow System)

- User Manual
- Training Classes
- Wish List
- Submit Feedback

Permanent Widgets

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

Remove or modify the settings of any widget by selecting “Config” immediately below and to the right of the widget.
All Internal Users

Navigate Your Dashboard

To view snapshot(s) of a contract, click on the contract section. To complete prompt payment information, click on the contract audit section. To document your team members on a contract, click on the utilization plan section.

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

Personalize Your System Dashboard

Click “Personalize” in the Dashboard in the yellow bar in the right corner of the Home screen
Based on the following table, select the suggested modules most relevant to your position

<table>
<thead>
<tr>
<th>Department</th>
<th>Team/Role</th>
<th>Suggested Modules for Dashboard</th>
</tr>
</thead>
<tbody>
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<td>Headquarters</td>
<td>Certifications</td>
<td>Certifications, Certification Applications</td>
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<tr>
<td></td>
<td>Civil Rights Compliance</td>
<td>Contracts, Contract Audits, Contracts Summary, Utilization Plans</td>
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<td></td>
<td>Contracts</td>
<td>Vendors</td>
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<tr>
<td>Engineering or Specialty Units</td>
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<td>Priority Flagged Contracts</td>
</tr>
<tr>
<td>Region</td>
<td>Region Management (RTD, RCRM, Program Engineer/Managers)</td>
<td>Favorite Reports, Contract/Concessions Summary (For Organization), Contract Summary, (For Organization), Contract Audits (For Organization)</td>
</tr>
<tr>
<td>Region Civil Rights Office</td>
<td></td>
<td>Contract/Concessions Summary (For User), Contract Summary (For User), Contract Audits (For User)</td>
</tr>
<tr>
<td>Resident Engineers</td>
<td></td>
<td>Contract/Concessions Summary (For User), Contract Summary (For User), Contract Audits (For User)</td>
</tr>
<tr>
<td>CDOT Project Personnel</td>
<td></td>
<td>Priority Flagged Contracts, Contract Audits (For User)</td>
</tr>
</tbody>
</table>

Click “Add to Dashboard” at the bottom

Add additional modules at any time by selecting “Personalize” from the yellow bar in the upper right corner of the Home screen

**Key Actions**

The key actions menu is a quick access menu for completing some of the business initiated forms and applications for certifications and prequalification.
Locate Contracts

From the Navigation Menu, Click Search >> Contracts

Enter the 5 digit CDOT subaccount contract number, master contract OLA number or task order number, title, or contractor

Click “Search”

Click the contract number or any blue underlined area to review the contract

Full List of your Contracts

From the Navigation Menu, click “View >> My Contracts”

Click “View” next to the contract you want to review

You can use search by entering the 5 digit CDOT subaccount contract number, master contract OLA number or task order number, title, or contractor

Click “Search”

Click the contract number or any blue underlined area to review the contract
All Internal Users

Search a Specific Contract

From the Navigation Menu, click Search >> Contracts

You can use search by entering the 5 digit CDOT subaccount contract number, master contract OLA number or task order number, title, or contractor

Click “Search”

Click the contract number or any blue underlined area to review the contract

Flag and Access Priority Contracts

Locate the contract through “Search”

Under the gray bar on the main tab of the contract, click “Add to Dashboard as Priority Flagged Contact”

Once flagged, you can access the contract from the Dashboard by clicking on the contract

To remove flag, reenter the contract and click “Remove from Dashboard”

Navigate the Contract Tabs

Contract Management
Main Tab

Change the compliance contact and find quick links to manage subcontractors, task order, etc.

You can change the contact person in the Compliance Contact Person menu

There are quick links to View Subcontractors or Compliance Audit List

Subs Tab

View a list of approved subs. Review a list of each subs PCWs/LOIs on the contract against the master contract. Additional subs or supplier/vendors will be added to a specific task order. Additional firms added will include attachments of the PCW/LOI documentation. See “Add Subs”.

Docs Tab

View and/or upload all pertinent documents
All Internal Users

If you do not have access to a Docs tab, attach documents through Attach File

Click “Add Document” to upload documents.

Change Orders and Task Orders Tab
(CDOT Only)

Record modifications to the contract value or end date, track connected task orders and enter new contracts

Change approved DBE goal or commitments from reevaluations on NPS contracts or approved modifications

Comments Tab

Add comments viewable to all users linked to the firms account. These comments are not visible to subs or the prime.

Closeout Tab
(Civil Rights Only)

Verify and record information required to close contract

The Close Date refers to the date the B2GNow contract is closed. See “Final Payment Date vs Close Date” for clarification. Once the contract is closed in system, it cannot be reversed.

Compliance Audit List Tab

View a list of the Audit Period, Status, and amount Paid to Prime for each of your monthly audits on the contract
Audit Summary Tab
(CDOT and Primes Only)

One of the many benefits of the B2GNow system is that it is a free tool to assist you in tracking compliance on your task orders.

Click ‘My Contracts’ under the ‘View’ tab

For NPS contracts, to view DBE participation on each task order, view the task order

The master contract is under (321xxxxxx) the contract name. Task order contracts (431xxxxxx) will be titled with the contract name and ‘T/O #' at the end.

Click on the “Compliance Audit Summary” tab

After selecting your desired task order, click the “Compliance Audit Summary” tab for a snapshot of compliance

Find the task order contract. Task order contracts will be titled with the contract name and ‘T/O #' at the end.
For NPS contracts, review the ongoing progress toward contract completion and the DBE goal under each task order. The audit summary tab is not used for Project Specific contracts for Master Contracts.

- Total Contract Amount
- Overall small business goal
- Dollar amount paid to date
- Amount paid to for credit DBEs to date
- DBE payments based on contract award
- DBE goal
- Progress tracking
Master Contract Audit Summary for PGS/PS Contract Participation (CDOT only)

Reports Tab

CDOT has access to reports that can help with accumulating information. Consultants, suppliers/vendors do not have access to as many reports that CDOT may have.

Attach Documents

External users will need to attach pertinent documents through the “Attach File” button. CDOT users can use the Docs Tab.
**DBE Primes**

If a DBE prime is marked to be included in the DBE committed goal, the prime cannot state the amount or percentage. The system will assume 100% of the participation is counted toward the goal. If you are a DBE Prime, you may choose “DBE Prime - Self Performing Prime Contractor” in the *Type of Participation* field.

For example: If the prime got awarded $1,000,000 and selects to be counted toward the goal, the system will automatically count 100% of that award. The percentage will change when the prime adds DBE subs. If the prime adds a sub with the amount of $300,000 then the percentage of counting toward the goal goes will reduce (from 100% to 70%).

### Distinguish Your DBE Commitment Toward Goal (Civil Rights and Primes Only)

CDOT requires any DBE firm to be included in goal (click “Yes” in the *Count Toward Certified Goal* section) in the B2GNow system with the appropriate NAICS codes the firm is performing.

The system *does not* track the difference between *Race Conscious* or *Race Neutral* goals separately in the *Compliance Audit Summary Total Contract* section.

**Race Conscious:** DBE participation used on projects that counts toward the DBE goal/commitment set for the contracts.

**Race Neutral:** DBE participation used on projects that *do not* count toward the DBE goal.
Choose the correct credit type of Race Conscious or Race Neutral

View your subs DBE credit type in the *Inc. in Goal* section

Add DBE NAICS Codes for DBE Firms

In the *Work Codes* section, click “Add Work Codes”

For DBE certified firms, click “Add Other Work Codes”

Select the *CDOT Line Items* option from the drop down menu, if applicable

In the search box, search by key word and/or item code

Click “Add” next to the line item code you are seeking

Click “OK” in the popup box
Once you are finished adding item codes to the sub record, click “Return” on the upper right side.

Line items will appear in the **Work Codes** section of the form (disregard the red exclamation point in this example).

**Primes: Add Subs**

All participants receiving payment on the project must be requested through the prime and approved through the B2GNow system by Civil Rights. Primes will add all subs, suppliers/vendors no matter the tier. All lower tier subs will request to add additional firms through the prime. Add any subs, DBE supplier/vendors for any amount, nonDBE supplier/vendors providing at least $10,000 worth of goods and materials, vendors, truckers/haulers, manufacturers, etc. to the contract. New subs, suppliers/vendors will require the PCW/LOI as attachments for documentation. Civil Rights will receive a prompt to approved the added sub, or supplier/vendor.

**Add 1st Tier Subs**  
*(Primes and Civil Rights Only)*

All 1st Tier Subs are required to be included in the Consultant’s contract. If the Sub was not on the original proposal, there should be an amended contract that includes the PCW/LOI and other pertinent documentation as required.

From the **Subcontractors** tab, click “Add First Tier Subcontractor”.

On the next screen, click “Get Vendor”, then use the next screen to search for the vendor by name. It may be helpful to search by the B2GNow vendor account number to ensure you select the correct account.
Click “Select Vendor” on the right side of the screen for the appropriate firm. Confirm your vendor number if that is not how you searched.

If the firm does not appear, you may need to contact the firm to ensure the firm has a B2GNow account.

Firms may not start work on the project without first creating an account in the system.

Once you have selected the correct vendor, use the drop down menus to select the firm’s compliance contact and address.

Complete all required (*) fields in the Subcontractor Information section.
All DBE firms must be included in the overall DBE data in the B2GNow system by clicking Yes in the Count Towards Certified Goal section. Civil Rights will choose whether the firms work is race conscious or race neutral. See “Distinguish DBE Commitment Toward Goal” for clarification.

Choose the appropriate NAICS work codes the DBE firm is performing on your project. The Work Codes section will only prepopulate for DBE certified firms. If you need to add work codes to firms that are not DBE certified, click “Add Work Codes” to search for work codes.
All Internal Users

To add line items for DBE certified firms, click “Add Other Work Codes” to search the CDOT Line Items list. Only CO UCP NAICS codes will prepopulate.

At the bottom, click “Review”

Click “Save” on the next screen to submit

Add Lower Tier Subs  
(Primes, 1st and Middle Tier Subs, Civil Rights Only)

All 1st Tier Subs are required to be included in the Consultant’s contract. If the Sub was not on the original proposal, there should be an amended contract that includes the PCW/LOI and other pertinent documentation as required.

From the Subcontractor’s tab, click “Add Tier # Sub”

Repeat steps in “Add 1st Tiers Subs”

Add Suppliers/Vendors  
(Consultants and Civil Rights Only)

The example is an added supplier/vendor for a sub

Subcontractor: Rocky Mountain Signing Company, Inc

2nd tier: Trojan Labor

Set up the DBE supplier/vendor, in this case, Trojan Labor, to count towards the DBE Goal
All Internal Users

This will allow all of the payments to be reported towards the goal

**DBE Firms Using NonDBE Supplier/Vendors**

There are situations when a DBE firm uses a nonDBE supplier/vendor. Typically, the amount the DBE pays the supplier/vendor should not be deducted from the DBE participation. However, B2GNow does not know this and deducts those payments. Civil Rights will have to manually select those payments every month to count toward the goal.

**Ensuring DBE Credit is Given for NonDBE Supplier/Vendors Who Are a Sub to a DBE That is Performing Work**

(Civil Rights Only)

**Important NOTE:** Steps below need to be only completed once.

From the **Home screen** >> **Contract** >> Choose a contract

<table>
<thead>
<tr>
<th>Contract #</th>
<th>Status &amp; Date</th>
<th>Contract Value</th>
<th>% Goal</th>
<th>% Credit</th>
</tr>
</thead>
<tbody>
<tr>
<td>11430.30.40</td>
<td>Open</td>
<td>$192,000,932</td>
<td>12.9%</td>
<td>0.2%</td>
</tr>
<tr>
<td>11430.30.10</td>
<td>Open</td>
<td>$48,000,000</td>
<td>11.4%</td>
<td>0.0%</td>
</tr>
<tr>
<td>11430.30.30</td>
<td>Open</td>
<td>$12,880,564</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

Click the **Subs** tab

**Contract Management: Subcontractor List**

Locate DBE firm who has nonDBE supplier/manufacturer subs

Select the nonDBE sub by clicking “**Edit**”

Confirm the percent of payments to be counted is 100%

In settings, **Count Toward Certified Goal** should be marked **No**
All Internal Users

Change Goal Type to DBE

Note the changes in Additional Information section under Comments

Click “Review” at the bottom

Verify changes, click “Save”

Click the Subs Tab to return to the subcontractor list

Important NOTE: The below steps need to be completed monthly. This is only to be done for nonDBE supplier/manufacturing subs who are subs to DBE subs performing work.

Locate the sub that was just edited, click “More”

Click “Payments”

Click “All Yes” under Inc in Goal column

Now only the payments are counting for credit but not for the supplier/vendor
All Internal Users

After reporting has been completed, go back and change the No to Not Yet so that future payments are counted until the end of the contract.

This will need to be done for every reporting period.

CDOT can generate a report that will give the vendors counting for credit that are not currently certified to help you identify these vendors. You may request a support ticket through the B2GNow system.

**Substitution Requests**
(Any Tier) (Primes and Civil Rights Only)

This is to replace one sub with another. If the firm being replaced is a committed DBE sub, a Professional Services DBE Participation Plan Modification Request form is a required attachment.

From the *Subcontractors* tab, click “Substitute Sub”
Complete the Substitution Information section

Attach the Professional Services DBE Participation Plan Modification Request form or Task Order Request documents

<table>
<thead>
<tr>
<th>Subcontractor</th>
<th>Certified</th>
<th>Current Award</th>
<th>Type Inc. Goal</th>
<th>Final Audit</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>CDOT Sub Test 1</td>
<td>No</td>
<td>$10,000</td>
<td>Req. Dealer</td>
<td>No</td>
<td>Remove Sub</td>
</tr>
</tbody>
</table>

Complete the rest of the screen

Lower tier firms will request substitutions through their prime

The request will be prompted to CDOT for approval

**Removal of Subs Requests**  
*(Any Tier) (Primes and Civil Rights Only)*

This process is to eliminate a firm's work on the project PRIOR to any work being done by the firm

If the firm being removed is a committed DBE sub, a Professional Services DBE Participation Plan Modification Request Form is a required attachment

From the *Subcontractors* tab, click "Remove Sub"

Complete the *Removal Information* section

Attach the Professional Services DBE Participation Plan Modification Request Form if the sub is a committed DBE

Lower tier firms will request removals through their prime

The request will be prompted to CDOT for approval
Non Project Specific Process Flowchart

Contracts Awarded Prior to 12/31/2019

Contracts Awarded After 1/1/2020
All Internal Users

Project Specific Process Flowchart

Contracts Awarded Prior to 12/31/2019

- Team established in contract w/proposed DBE and GFE with Form: Affidavit of Small Business Participation
  - Task Order requested
  - Task Order requested is approved
  - Work performed
    - GFE evaluated by CDOT
      - GFE approved? Yes: Consultant and/or CDOT reviews scope of work and provides feedback
      - GFE approved? No: Consultant requests approval to modify commitments by submitting task order modification letter, project cost worksheets, anticipated participation plan form and GFE. CDOT Project Manager processes in Milestones.
        - Work is complete, submit final invoice
        - Work complete and Task Order closed out
  - Consultant requests approval to modify commitments by submitting task order modification letter, project cost worksheets, and anticipated participation plan form and GFE. CDOT Project Manager processes in Milestones.

Contracts Awarded After 1/1/2020

- Project Specific Task Order Contracts DBE Process
  - CDOT established project and contract goals, BFE issued
  - Contract setup in BFE with DBE utilization plan
    - Consultant submits DBE and LSDB commitments to CDOT
      - Consultant confirms that task order align w/DBE utilization plan and completes GFE
        - Work performed
          - Form: DBE Participation Plan Modification Request
    - AP/GFE approved? Yes: Task Order approved
    - AP/GFE approved? No: Approach and task order redone
      - Consultant requests approval to modify commitments
        - Work is complete, submit final invoice
          - Form: Closeout Report and all supporting documents for modifications and good cause for not meeting commitments
    - CDOT closes Task Order
  - All work is complete under master contract
  - Final invoice is submitted for all task orders. Submit closeout report for the contract.
    - CDOT reviews closeout report for DBE payments made against contract goal and all supporting documentation for modifications
      - CDOT closes contract and issues possible sanctions to the prime consultant

https://codot.gov/business/civilrights
Prompt Payment Audits

Lowest Tier Subs
- Register in B2GNow
- Confirm or dispute payments reported by Prime or higher tier sub
- Respond to Discrepancies after reporting

SubPrimes
- Register in B2GNow
- Report payments to lower tier subs and suppliers/vendors
- Confirm/Dispute payment reported by Primes
- Respond to Discrepancies after reporting

Primes
- Register & Prequalify in B2GNow
- Report payments from CDOT and payments made to lower tier subs, suppliers/vendors
- Oversee reporting by SubPrimes with lower tiers
- Respond to or Resolve discrepancies within one week of disputed report

CDOT Project Staff
- Oversee payment reporting process for assigned projects working through Prime to ensure all payment is entered by the 16th of the month
- Resolve any discrepancies within one week of prime and sub responses and within two weeks of reported dispute
- Close incomplete audits by confirming all unconfirmed sub records after 15 days of non response

RCRO
- Monitor prompt payment process for all projects across region
- Assist Project Engineers with system or regulation related concerns
- Review prompt payment audits in connection with regular CR review
- Coordinate with Engineers to resolve incomplete audits and unresolved discrepancies based on CRBRC monthly report

CRBRC
- Monitor prompt payment process for projects statewide
- Assist RCROs with prompt payment or discrepancy related questions and concerns
- Audit prompt payment reporting for randomly selected projects
- Coordinate with RCROs to resolve incomplete and discrepant audits on a quarterly basis
All Internal Users

Who is Responsible?

1st of the month

Who is Responsible?

16th of the month

Who is Responsible?

30th of the month

Lowest Tier Sub

Audit Available

Confirm or Dispute Payment Report. If disputed, respond to Discrepancy

SubPrimes

Audit Available

Report Payment to lower tier Subs & Suppliers/Vendors

Confirm or Dispute Payment Report. If disputed, respond to Discrepancy

Primes

Audit Available

Respond to previous month’s discrepancies

Report Payment from CDOT and to first tier

Confirm SubPrimes have reported

CDOT Project Staff

Resolve any discrepancies on previous month’s audit

Confirm Prime and all SubPrimes have reported payments

Close previous month’s audit

RCROs

Review previous month’s audit for any unreported lines or unresolved discrepancies.
Monthly Prompt Payment Reports
(B2GNow System Audits for Consultants and Suppliers/Vendors)

Monthly Audit reports (emails) are automatically created and sent to the prime and any sub (lower tiers or supplier/vendor) on the first of every month for payment in the previous month. The audit request information about the actual payment made and received during the audit period regardless of the work associated invoice or pay estimate date. These audits are released to lower tier subs as soon as the prime or 1st tier subs reports the payment made to its lower tiers. Firms at any tier have 15 days to complete the audit from the day it is released to them for their confirmation. Audits request information about the actual payments made and received during the audit period. This report does not consider what month the work was performed or invoiced - only paid. Make sure to take note of the reporting period of the audit to ensure submittal of payment data is for the correct period. Each audit is delayed by one month (a June audit will be received in July). For example, the audit report for October 2017 is generated and released to the primes and 1st tier subs on November 1, 2017 to collect their payment information. It is requesting information about money paid in the month of October. Most likely, these payments reflect amounts from the September pay estimate and September invoices.

NOTE: All monthly audits must be completed even if you are paid zero dollars. If audits are not completed by the 15th of the month, you waive CDOT’s involvement in resolving any related payment dispute or discrepancy. At 16 days, you will receive daily emails prompts.
Access and Complete the Audit (Consultants)

You may complete your audit by responding to an e-mail prompt or through your Home screen. An audit reminder is sent by e-mail monthly for each reporting period. The email includes a link which will take you directly to the report that is due once you enter your username and password.

Log in to the B2G System at http://contracts.codot.gov/

On the Home screen, find Incomplete Audits in your Dashboard and click on the red number

Click “Incomplete” in the audit you wish to complete

NOTE: You may also enter the audit through an individual contract. If you do, the audit list will look different

To enter the Audit from this screen, click “View Audit”

Verify the payment data reported. If the firm has already responded to the discrepancy, review the primes response

If the amount entered by the prime or sub is correct, select the correct option. If neither are correct, select the third option and report the correct amount. Include comments and attach documents in support of the answer.

Private comments are only visible to the firm that made the comment and CDOT
Public comments are available to all

Remember, the correct amount is the amount paid by the higher tier firm during the calendar month of the audit period

Once both firms have saved their responses, Civil Rights will assist to help resolve any remaining issues

Payments from CDOT (Primes Only)

Once you have entered the audit actions, report payment from CDOT

Click “Report Payment Received from Colorado Department of Transportation”

Click “Report Payment to Prime”

Complete required fields (*)

Click “Save”

You will automatically return to the audit
Report Payment to 1st Tier (Primes Only)

In the middle of the screen, click “Submit ALL Incomplete Records”

You may also enter records individually by clicking “Submit Response” in the Actions column for each sub

Complete fields for only 1st tiers

Click “Save”

If payment information has been entered for all subs (at all tiers) an audit confirmation will be received

You may click “Return to Audit” to verify your input and edit if necessary

If any subs at any tier are missing payment information, you will automatically be returned to the audit

Once you confirm that no 1st tier subs are missing payment information, the audit is completed

Go to the Home screen to exit the audit

Once you have saved the information, no further action is required unless a lower tier reports a discrepancy
All Internal Users

Report Sub Payments
(All Subs with Lower Tier Subs or Suppliers/Vendors)
(1st Tier and Middle Tier Subs)

Report payment to all next tier subs and supplier/vendors by the 15th of the month

In the Audit Actions box, click “Report Subcontractor Payment”

On the next screen, click “Submit ALL Incomplete Records”

You may also enter records individually by clicking “Submit Response” in Audit Actions column for each sub

Complete the fields for all subs and supplier/vendors with whom you contract directly

If your subs have lower tier subs, DO NOT fill out the payment information

https://codot.gov/business/civilrights
Click “Save”

If payment information has been entered for all subs an audit confirmation will be received

Click “Return to Audit” to verify your input and edit if necessary

If any subs at any lower tier are missing payment information, you will automatically be returned to the audit

Once you confirm that no next tier subs are missing payment information, the audit is completed

If the higher tier sub has already reported its payment to your firm, return to the audit

If the firm has not reported its payment to your firm, go to the Home screen in the left corner to navigate away from the audit

You will need to log in again later in the month to confirm or resolve discrepancies related to your payment

Complete the confirmation step once you receive notice from the system that your lower tier has completed the reporting step

Review Incomplete Audits

From the **Contract Audits** in your **Dashboard**, click the red number in the **Incomplete Audits**

Ensure the assignment check box is unchecked

Filter by pending status to find open audits

In the list that comes up, use the drop down menus to filter the audits by month and status
Use the table to determine which month you should filter by to clean up older audits

<table>
<thead>
<tr>
<th>On the 16th of...</th>
<th>Filter by...</th>
<th>Filter by...</th>
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</tbody>
</table>

Pending Prime: Not all firms have reported. The number in parenthesis shows you how many lines are incomplete.

Pending Sub: Not all firms 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 firms have reported.

Pending all: Shows all open audits.

Click the blue, underlined audit period to enter the audit

Option: Create a 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, contract, month

Compare the due dates in the report with the incomplete Not Yet records in B2GNow

Verify that all contractors listed as Not Yet are listed on the Subcontractor Due Date Report

If all incomplete Not Yet records in B2GNow are past due based on the Subcontractor Due Date Report, click “Mark Unconfirmed Sub Entries as Confirmed” to close the audit
If there were delays in the reporting phase of the audit such that the sub 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 sub records on the audit are past due

To close an individual subs record under the *Not Yet* status of the individual audit, click “Edit”

Complete the audit response form assuming the prime reported the payment correctly

Save the audit

**Review Past Due Audits**

Every prime and sub 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.

Failure to completing this report is a condition of payment. Without this reporting, CDOT is unable to capture and monitor prompt payment information.

From the *Contract Audits* in your *Dashboard*, click the red number in the *Past Due Audits*

Filter by *Prime Past Audits* status to find late audits

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

Use the table to determine which month you should filter by to clean up older audits
Click the blue, underlined audit period to enter the audit.

All past due lines will be labeled *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.

The prime is responsible for logging in and reporting the 1st Tier sub payments. Middle or subs are responsible for reporting and/or confirming payments. Lower tier subs are responsible for confirming payments. Amounts will be reported even if $0.00. If any subs have not reported, the prime is responsible for ensuring as a condition of award. In the event the reporting is missing, contact the prime.

**Close Incomplete Audits**

Subs get 15 days to respond to reports from their higher tiers. After 15 days pass, CDOT is allowed to close the audits.

Contracts in B2GNow **cannot** be closed until all audits have been closed.

From the *Contract Audits* in your *Dashboard*, click the red number in the *Incomplete Audits*.

Filter by pending status to find open audits.

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

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

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Pending Prime: Not all firms have reported. The number in parenthesis shows you how many lines are incomplete.
Pending Sub: Not all firms 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 firms have reported.

Pending all: Shows all open audits.

Click the blue, underlined audit period to enter the audit

Identify all firms listed as Not Yet. These are your incomplete records.

Ensure that all incomplete records have been open for at least 15 days. All subs must have 15 days to respond to a report according to the contract.

Under the Not Yet status of the individual audit line, click “View”

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

Repeat this process for all incomplete lines

If all lines were reported more than 16 days earlier, click “Mark Unconfirmed Sub Entries as Confirmed”

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

NOTE: This process only applies to incomplete responses. There is no equivalent process for incomplete reporting. Reporting by the prime and all subs is a condition of payment.

Review Past Due Audits

Every prime and sub 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.
Failure to completing this report is a condition of payment. Without this reporting, CDOT is unable to capture and monitor prompt payment information.

From the Contract Audits in your Dashboard, click the red number in the Past Due Audits

Filter by Prime Past Audits status to find late audits

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

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

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</tbody>
</table>

Click the blue, underlined audit period to enter the audit

All past due lines will be labeled 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

The prime is responsible for logging in and reporting the 1st Tier sub payments. Middle or subs are responsible for reporting and/or confirming payments. Lower tier subs are responsible for confirming payments. Amounts will be reported even if $0.00. If any subs have not reported, the prime is responsible for ensuring as a condition of award. In the event the reporting is missing, contact the prime.
Confirm or Dispute Payments  
(Subs Only)

Within 15 days of receiving notice from the system when the prime has reported their payment, log in to the system to confirm your payment. See “Access and Complete the Audit” for help getting to this step.

Once you have entered the audit, confirm payment the prime. This step is for situations where there are no payment disputes.

If payment amount is disputed or withheld, skip this step See “Report a Payment Dispute”.

Click “Confirm Payment Received”

Complete the form

Remember, if you report that the payment information is correct, you waive CDOT’s involvement in resolving any related payment dispute or discrepancy.

Report a Payment Dispute

Go into the month’s audit you want to report the dispute

From the Compliance Audit Actions screen, click “Confirm Payment Received”

Complete required fields (*) Check the box to sign and release

---

**Compliance Audit Information**

<table>
<thead>
<tr>
<th>Category</th>
<th>Action Required &amp; Response Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tier 1 Subcontractor to CDOT Prime Test 1</td>
<td>due by 11/8/2019 (PAST DUE) audit lock on 8/7/2031</td>
</tr>
<tr>
<td>Sub-Prime: Confirm payment received</td>
<td></td>
</tr>
</tbody>
</table>

You are assigned to this contract in multiple capacities. 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 a subcontractor your responsibility is to confirm payments made to you by the prime or higher level subcontractors and report payments made by you to lower subcontractor levels. As a subcontractor your responsibility is to confirm payments made to you by the prime or higher level subcontractors.
Add comments

In the *Audit Information* box

Click “Incorrect”

Select correct ONLY when there is no dispute related to the payment AND reported payment was actually received

Select incorrect to report a discrepancy or dispute even if payment reported is accurate

Click “Save”

Click “Return to Audit Notice”

If payment is disputed or withheld, you must report a discrepancy within 15 days of receiving notice of the audit

Discrepancies will show in the system

If the higher tier reported $0.00, complete the form

**NOTE:** You must report an amount at least $100 different from the amount you are asked to confirm. Differences less than $100 are not flagged by the system even if marked incorrect.

If the higher tier reported is not $0.00 amount, select either of the below options, then complete the fields that appear

Amount must be at least $100 more or less than the amount reported by higher tier. Differences less than $100 are not flagged as discrepancies by the system.

Enter Payment Due Date or last day of audit month
Complete required fields (*)

Click “Save”

Click the Home screen to navigate away from the audit

Verify the payment data you reported. If the prime has already responded to the discrepancy, review the primes response.

If either the amount entered by you or the amount entered by the other firm is correct, select the correct option. If neither are correct, select the third option and report the correct amount. Include comments and attach documents in support of your answer.

Private comments are only visible to the firm that made the comment.

Public comments are available to the prime as well.

Remember, the correct amount is the amount paid from the higher tier firm during the calendar month of the Audit Period

Once both contractors have saved their responses, Civil Rights will assist to help resolve any remaining issues.

Review Discrepancies

From the Contract Audits in your Dashboard, click the red number in the Discrepancies line.

Ensure the assignment check box is unchecked.

Filter by Discrepancies to find unresolved discrepancies.

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

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

<table>
<thead>
<tr>
<th>On the 16th of...</th>
<th>Filter by...</th>
<th>Filter by...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>Nov</td>
<td>Jul</td>
</tr>
<tr>
<td>Feb</td>
<td>Dec</td>
<td>Aug</td>
</tr>
<tr>
<td>Mar</td>
<td>Jan</td>
<td>Sep</td>
</tr>
<tr>
<td>Apr</td>
<td>Feb</td>
<td>Aug</td>
</tr>
<tr>
<td>May</td>
<td>Mar</td>
<td>Nov</td>
</tr>
<tr>
<td>June</td>
<td>Apr</td>
<td>Dec</td>
</tr>
</tbody>
</table>

Click the blue, underlined audit period to enter the audit

In the Subcontractor Payment section, locate the payments that say Discrepancy and click “Resolve”

![Discrepancy Resolution Example]

**NOTE:** Clicking this link will not automatically resolve the discrepancy

Review any available responses in the Discrepancy Resolution Data Reported Section

<table>
<thead>
<tr>
<th>Discrepancy Resolution Data Reported</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Amount Reported by Prime</td>
</tr>
<tr>
<td>New Amount Reported by Subcontractor</td>
</tr>
</tbody>
</table>

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

**Access and Respond to the Discrepancy**

Log in to the B2GNow System at http://contracts.codot.gov/or https://cdot.dbesystem.com/

On the Home screen, find Audit Discrepancies in your Dashboard and click on the red number

Click on “# Discrepancy” in the left column of the audit you wish to complete
NOTE: You may also enter the audit through an individual contract. If you do, the audit list will look differently.

To enter the audit from this screen, click “View Audit” on the right.

In the Audit Actions Section, click “Resolve # Discrepancies”

In the Subcontractor Payment section, locate the payments that have been rejected and click “Resolve Discrepancy”

NOTE: Clicking this link will not automatically resolve the discrepancy

Review any available responses in the Discrepancy Resolution Data Reported Section

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

Resolve the Discrepancy

Primes must be involved in resolving all discrepancies. If the discrepancy is between the prime and its 1st tier sub or supplier/vendor, the prime will need to check the information that has been provided. If the discrepancy is between lower tier subs, the prime will need to be more involved in fact finding. The prime is ultimately responsible for compliance at every level of the project, firms other than the prime CANNOT resolve the discrepancy on their own behalf.

Discrepancies happen for one of two reasons: 1) One party made a reporting error 2) The lower tier sub is trying to notify CDOT of a payment issue. The discrepancy is the way in which a sub can ask for CDOT’s assistance in resolving a payment issue or potential prompt pay violation. These discrepancies should be taken seriously. Keep in mind, if at any point the two firms come to an agreement on the discrepancy, the record is no longer discrepant. When a lower tier sub or supplier/vendor reports a discrepancy (disagrees with a payment amount reported by a higher tier firm) to CDOT, the prime, and the sub who reported a discrepancy will be notified of the issue. All parties should log in 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, and the CDOT Project Engineer.

Review the responses from both the prime and the sub. If either party has not yet responded, you will need to contact that firm. 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.
All Internal Users

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.

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.

NOTE: There may be cases when payment was released to the sub at the end of one month and not received by the lower tier sub until the next month. When payments are received the next month but the check is dated in the previous month, report payment in month check is dated. This also applies to primes paid by CDOT.

A note about resolving discrepancies for Project Engineers: As the PE, your role in this process is twofold. 1) Your job is to ensure the subcontractors issue is acknowledged. 2) Your job is to 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.

Sub or Supplier/Vendor Reported Discrepancies

See “Access and Respond to the Discrepancy” to access the discrepancy

Contact the person who reported the initial payment data. The person’s contact information should be provided with the responder information, but you can also send an email through the system by clicking on the person’s name

Gather necessary proof to resolve the audit discrepancy including how much the sub paid its lower tier and on what date

Based on the information provided by your sub, complete the required fields to resolve the discrepancy
If either the amount entered by the 1st tier sub or the amount entered by the lower tier firm is correct, select the correct option. If neither are correct, select the third option and report the correct amount. Include comments and attach documents in support of your answer.

Private comments are only visible to the firm that made the comment and CDOT

Public comments are available to all

**Remember**, the correct amount is the amount paid by your higher tier firm to its lower tier firm during the calendar month of the audit period

Once both contractors have saved their responses, CDOT staff will be in touch to help resolve any remaining issues
Project Staff

Project Staff: Project Closeout

Semi-Final Closeout/Payment
(Primes Only)

Use the Search >> Contracts feature to locate the contract you are evaluating.

Once in the contract, navigate to Compliance Audit List to check the status of the most recently recorded audit.

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

Check the status of the last audit by clicking “View Audit” from the audit list.

Check the status of the last audit by clicking “View Audit” from the audit list.

When paying a lower tier sub for the final time, click “mark audit as final”.

Click “Report Payment to Prime”.

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. Mark the audit as final if appropriate. See “Final Estimate/Payment of Subcontractors.”

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. See “Final Estimate/Payment of Subcontractors.”
Review the Audit Summary - Total Contract Section

Review progress toward the DBE goal. Work with Civil Rights to determine disincentive, if any, tied to failure to meet the DBE or ESB goal.

<table>
<thead>
<tr>
<th>Payments</th>
<th>Payments Percent</th>
<th>Difference (Payments - Award)</th>
</tr>
</thead>
<tbody>
<tr>
<td>$779,366.76</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$80,137.05</td>
<td>10.282%</td>
<td>10.282% above goal</td>
</tr>
<tr>
<td>$80,137.05</td>
<td>10.282%</td>
<td>10.282% above goal</td>
</tr>
<tr>
<td>$0.00</td>
<td>0.000%</td>
<td>Goal matched</td>
</tr>
</tbody>
</table>

Review the Sub Section

DBE commitments must be met based on the task order Utilization Plan. Review the UP, any approved Professional Services DBE Participation Plan Modification Request Forms and the actual amount paid to any committed subcontractors.

If the commitments were not met or have modifications are not approved, contact Civil Rights

Release Subs

From the Navigation Menu, click Search >> Contracts

Enter the 5 digit CDOT subaccount contract number, master contract OLA number, task order or title, or firm

Click “Search“

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

https://codot.gov/business/civilrights
Click “Edit” on the far right for the subcontractor you wish to release.

Once in the contract, navigate to the Subs tab.

Click “Review.”

Click “Save.”

Closeout/Payment of Subs (Civil Rights Only)

When paying a sub for the final time, click “mark audit as final.”

Click “Report Payment to Prime.”

Use the Search >> Contracts feature to locate the contract you are evaluating.

Once in the contract, navigate to Compliance Audit List to check the status of the most recently recorded audit.

View any audits with red lines to close incomplete audits and resolve remaining discrepancies.
Check the final status of the last audit by clicking “View Audit” from the audit list

Final Payment Date vs Close Date
(Civil Rights Only)

Use the Final Payment Date for the project closing date once the last payment has been paid. This is located on the main page of the contract. Project personnel can view the Final Payment Date but not the Close Date.

You can view on the Main tab of the contract

<table>
<thead>
<tr>
<th>Contract Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Award Start Date</td>
</tr>
<tr>
<td>Notice To Proceed Date</td>
</tr>
<tr>
<td>Final Payment Date</td>
</tr>
</tbody>
</table>

B2GNow projects cannot be closed until all audits have been resolved

In regards to audits, the B2GNow system could be a minimum of 45 days behind due to lags of the system. If a CDOT project has been closed and final pay has been billed, the audit prompt and the 15 day window for required response may lag. The Close Date will be used once all discrepancies are resolved. Once a project is closed in the system by the RCROs, it cannot be reversed.
Project Staff: Monthly Prompt Payment Checklist

**Most Recent Audit:**

- Prime reported payment received from CDOT
  - If not, contact prime. Prime must report payment received by the CDOT during the audit period. If prime did not receive any payment from CDOT during the calendar month of the audit period, prime must report $0.00.

- Firms at every level reported payments to lower tiers
  - If not, what level tier remains unreported?
  - If payments to 1st tier subs or supplier/vendors not reported, prime failed to report.
  - If payments to lower tier subs or supplier/vendors not reported, middle tier sub failed to report. Prime is ultimately responsible for ensuring subs at all levels of the project have reported payment.

**Previous Month’s Audit:**

- Address any discrepancies by checking the status.

  **Awaiting Civil Rights Response:** Based on the information provided in the prime and sub responses as well as any independent conversation with the prime and sub, resolve the audit based on the payment(s) actually released to and received by the sub during the audit period.

  **Awaiting Prime and/or Sub Response:** Contact prime to ask the nonresponsive party to respond through the system. Alternatively, CDOT project staff may ask firm to provide documentation related to dispute directly to the project team. If the firm provides documentation necessary to resolving the dispute directly to CDOT project staff, CDOT project staff must upload documentation to record when resolving discrepancy. **CDOT Staff should always resolve a dispute in favor of what actually happened during the Audit Period. Resolving the discrepancy is not necessarily the end of the process.**

- Confirm all unconfirmed sub records that have been in the system for over 15 days.
  - Use the *Mark Unconfirmed Entries as Confirmed* button in the audit lists.
Civil Rights Staff: NPS Contracts - DBE Task Order Goal-Setting/Approval Timeline
Civil Rights Staff: Change Order Process for DBE/ESB Modifications

The majority of the time when the Professional Services DBE Participation Plan Modification Request Form is approved by Civil Rights, the DBE goal has been modified. A change order will be created to change the DBE goal and/or commitment to show actuals.

Select the Change Orders Home Task Orders Tab

Click “Change Contract Value”

Fill in the Change Order Title, Date, and Note section

Attach the Professional Services DBE Participation Plan Modification Request Form (task order request form, PCW, LOI, APP) with any other relevant documents

Change the contract amount, if applicable

Change the DBE goal % in the Actual column in New Goals, if applicable

To keep the DBE goal % the same, choose The percent of the TOTAL new contract amount is button
Enter any contract amount changes for the subs included in the modifications

Otherwise, click “Update Blanks with $0”

Click “Review”

Click “Save”

Civil Rights Staff: Added Sub or Supplier/Vendor Requests (Civil Rights Only)

Sub Requests and supplier/vendor requests are now approved electronically through B2GNow. You will receive an email prompt when a prime or higher tier sub requests to add a lower tier sub, supplier/vendor to approve or deny.

From the Contract Audits in your Dashboard, click the red number in the Sub Requests - New

Ensure the assignment check box is unchecked

In the Actions column for a new request, click “View”

You can also View>>Sub Requests to view the requests

Review the sub information of the form and add any attachments
This section includes the following information: the requested subs tier and its direct prime, 1st tier subs, subcontract amount, sub, supplier/vendor, or trucker, sub start date. Any prepayment information (documentation should be attached) or line items.

CDOT DBE NAICS work codes will show up in the Work Codes section

Verify all sub settings

Complete Additional Information section as needed

If you approve the request, you will have a chance to edit any information related to counting, inclusion in the audits, etc.

Click “Approve Request”

Click “OK” in the popup box

Note: Civil Rights will upload any or all forms and documentation (task order request form, PCW, LOI for professional services only) if not already loaded in Docs tab or Attach Files

The firm will be notified through B2GNow automatically upon Civil Rights approval
Civil Rights Staff: Project Closeout
(Primes Only)

Semi-Final Closeout/Payment

Use the Search >> Contracts feature to locate the contract you are evaluating.

Once in the contract, navigate to Compliance Audit List to check the status of the most recently recorded audit.

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

Compare the payment data in the Closeout tab against the amount paid to date on the semifinal.

If the amounts do not match, review the progress payments and correct the errors.

Check the status of the last audit by clicking View Audit from the audit list.

When paying a lower tier sub for the final time, click “” Click “Report Payment to Prime”.

Select “mark audit as final” until you have received final payment from CDOT and paid out all subs.
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. Mark the audit as final if appropriate. See “Final Estimate/Payment of Subcontractors.”

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 if appropriate. See “Final Estimate/Payment of Subcontractors.”

Navigate the Closeout Tab

Check the contract status for any incomplete audits or unresolved discrepancies

Return to the Compliance Audit List tab to close audits or resolve discrepancies

Review the Audit Summary - Total Contract Section

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

Review progress toward the DBE goal

Determine disincentive, if any, tied to failure to meet the DBE or ESB goal

Review the Sub Section

DBE commitments must be met based on the task order Utilization Plan. Review the UP, any approved Professional Services DBE Participation Plan Modification Request Forms and the actual amount paid to any committed subcontractors.

If the commitments were not met or modifications not approved, contact Civil Rights
Release Subs

From the Navigation Menu, click Search >> Contracts

Enter the 5 digit CDOT subaccount contract number, master contract OLA number, task order, title, or firm

Click “Search”

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

Once in the contract, navigate to the Subs tab

Click “Edit” on the right for the subcontractor you wish to release

In the settings menu, select Yes for final payment

Otherwise, click No

At the bottom of the record

Click “Review”

Click “Save”
Closeout/Payment of Subs
(Civil Rights Only)

When paying a sub for the final time, click “Mark audit as final”

Click “Report Payment to Prime”

Use the Search >> Contracts feature to locate the contract you are evaluating. Once in the contract, navigate to the Closeout tab

Change Settings to reflect that final payment was made

Ensure Final Payment Date is entered. See “Final Payment Date vs Close Date” for clarification.

Change Settings and complete the Additional Information Section as normal

Choose work type

Commitment fields may be left blank

Click “Review”

Click “Save”

Final Payment Date vs Close Date
(Civil Rights Only)

Use the Final Payment Date for the project closing date once the last payment is paid. This is located on the main page of the contract. Project personnel can view the Final Payment Date but not the Close Date.
Civil Rights Staff

You can view on the Main page of the contract

B2GNow projects cannot be closed until all audits have been resolved

In regards to audits, the B2GNow system maybe a minimum of 45 days behind due to lags of the system. If a CDOT project has been closed and final pay has been billed, the audit prompt and the 15 day window for required response may lag. The Close Date will be used when once all discrepancies are resolved. Once a project is closed in the system, it cannot be reversed.
Civil Rights Staff: Monthly Prompt Payment Checklist

Review Incomplete Audits

☐ Compare your records with monthly incomplete audits report in the CRS System Resources Drive Folder.

☐ Confirm all sub records for subs that are past due based on the Sub Past Due Report in the CRS System Resources Drive Folder.

☐ Confirm that there are no audits in your region that are Prime Past Due
   Contact the project team or prime to resolve any prime past due audits.

   If payments to 1st tier sub or supplier/vendors not reported, prime failed to report.
   If payments to lower tier subs or supplier/vendors not reported, middle tier sub failed to report. Prime is ultimately responsible for ensuring subcontractors at all levels of the project have reported payment.

Review Discrepancies

☐ Review the Discrepancies by Region report in the CRS System Resources Drive Folder.

☐ Confirm that there are no discrepancies in your region

☐ Contact the project staff or Prime to resolve any outstanding discrepancies.

Understand the status:

Awaiting Civil Rights Response: Based on the information provided in the prime and sub responses as well as any independent conversation with the prime and sub, you may resolve the audit based on the payment(s) actually released to and received by the sub during the audit period.

Awaiting Prime and/or Sub Response: Contact prime or the project staff to ask the nonresponsive party to respond through the system

Please note, discrepancies must be resolved to reflect what actually happened during the calendar month of the audit period. Civil Rights may continue to be involved in resolving the underlying issue behind the discrepancy even if the discrepancy has been resolved in the system.

For any subcontractors who have been released from the project, mark final payment made.

Review any sub requests for task orders in your region.
Civil Rights Staff: Project Closeout Checklist

_Semi Final Closeout:_
- Compare the payment data in the close out tab in B2GNow with the payment data from the semi-final estimate
- Confirm the date of the most recent/last payment to the prime in Site Manager
- Verify that all audits are complete and there are no discrepancies, resolve as needed
- Mark the most recent audit as the final audit to stop future audits from being generating.

**Note:** Make sure not to cut off the lower tiers reporting ability. Prompt payment is based on a 7 day pay when paid structure at every tier. If the primes last progress payment was toward the end of the month, you may need to allow an extra month’s audit to capture lower tier sub payments.

- Compare the UP to the information in the _Closeout_ tab. If the project included any Professional Services DBE Modification Forms, you may request a Current Commitments Report through the CRBRC at (303) 757-9234.

- Based on the DBE utilization in B2GNow, the Utilization Plan/Current Commitment Report will determine any disincentives from failing to meet either the DBE goal or Commitment. Disincentives will also be on the Closeout Form once filled out by your Civil Rights office.

_Final Project Closeout:_
- In the _Closeout_ tab, make any corrections that may be needed
- In the _Closeout_ tab, enter the _Close Date_ for the project to _closeout_ in the B2GNow system
- In the _Closeout_ tab, click “Closeout Contract”