PRIME APPROVER GUIDE

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LCPTRACKER'S PRIME APPROVER FEATURE
GUIDE FOR ADMINISTRATORS AND PRIME CONTRACTORS

LCPtracker created this "Prime Approver" database to offer additional resources and control to Prime Contractors. Primes will now have the ability to check certified payrolls (CPRs) for their Subcontractors electronically before they are passed on to the NDDOT Project staff for final review.

The systematic flow of this database is much like the historical process of submitting paper payrolls to the NDDOT. Subcontractors submit their paper payrolls to the Prime for review and then the Prime can review and help the Subs fix any payrolls before they are finally sent on to the Project Engineer or their staff. The procedures are similar when using LCPtracker, except that everything is done electronically.

Aside from the benefit of instantaneous transmittal, LCPtracker offers both the Prime and the NDDOT Project staff top-of-the-line monitoring tools and comprehensive reports that will cut each parties work load from 50-75%.

To Facilitate the Prime Approver Process, the **NDDOT will contact the Prime Contractor** after award of their bid.

The Lead Administrator with Full Admin Rights at the NDDOT (Gail Brown, Ramona Bernard or Amy Conklin) will do the following:

1) Define **which** Prime Contractor(s) will need to have this high-level of access and determine **which individual(s)** at the Prime Contractor's Company will be acting as the "Prime Approver(s)." Typically, the **Prime Contractor will be contacted after the award of a contract and asked to name one individual as the Prime Approver for the contract**.

2) This person/people will be required to **have additional training** other than just the Contractor database because the tools that will be accessible to them are in a separate Prime Approver database.

3) Ensure that the Prime has a **Contractor Account** as well. This is where the Prime can submit payrolls for their own company. ***Note** --A Prime Contractor will have **TWO separate logins in LCPtracker**: Prime Approver and Contractor.

4) Create the special **login rights for the Prime Approver**.
   Go into the **Set Up tab** >>> **Add/Edit Admin Logins** >>> follow the prompts in the screenshot below. Then move on to **Step 5**. *** Note**—The Prime Approver will not have the capability to set up other users for this account. The Administrator will have to set up login rights for all users that will have access to this database—including any other Prime Approvers.

5) Assign the Prime Approver to a project.

The Prime Approver is typically only assigned to one project at a time, but it is possible to allow the Prime access to any number of individual projects. Whatever the choice, **do not forget to assign the Prime Approver** to a project.

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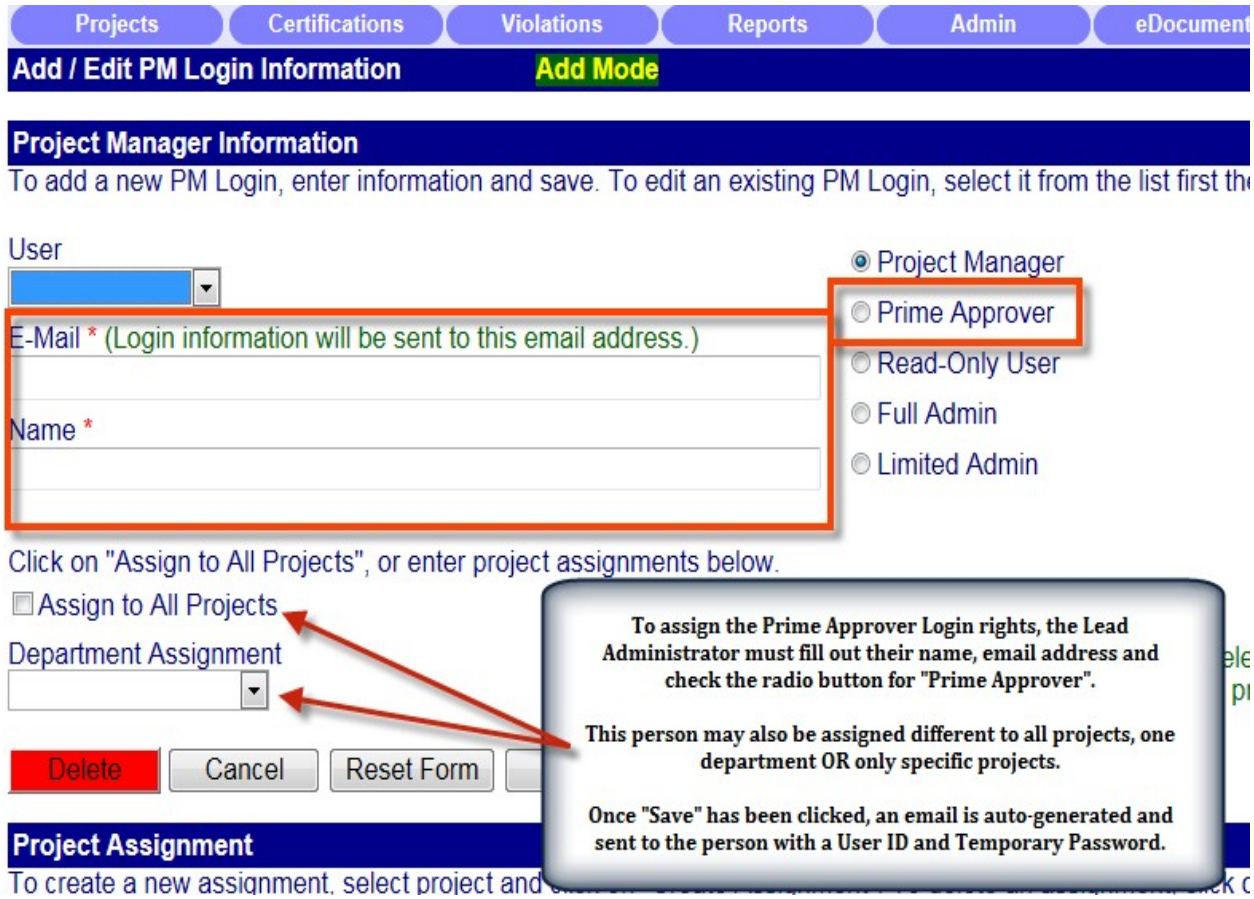
SCREENSHOT GUIDE TO STEP 4

CREATING THE PRIME APPROVER'S LOGIN – Note: This is done by the NDDOT Lead Administrator (Gail Brown/Ramona Bernard/Amy Conklin)



Once "Save" has been clicked, the **login email is auto-generated** to the Prime Approver.

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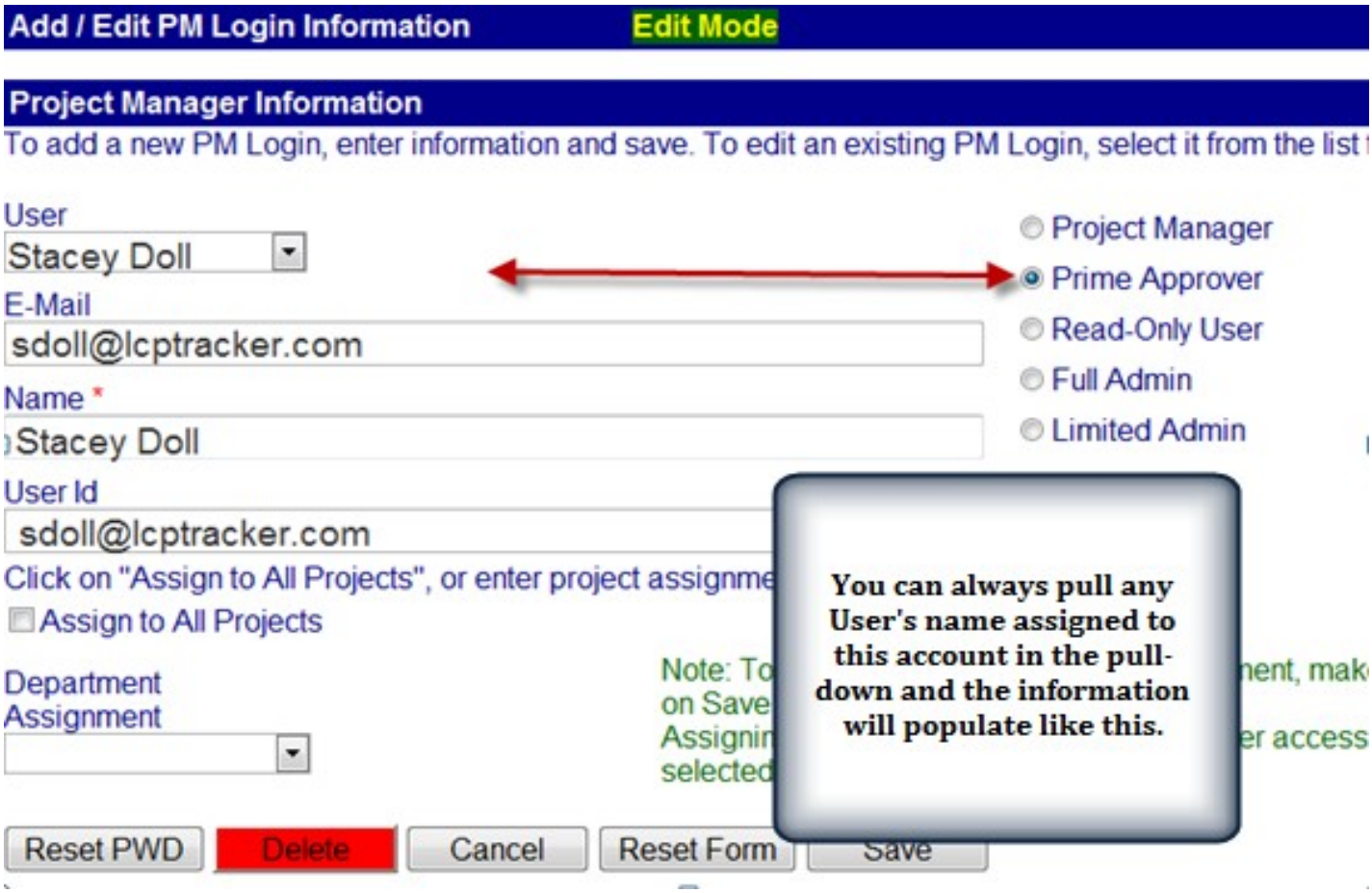
SCREENSHOT GUIDE TO STEP 5
ASSIGNING THE PRIME APPROVER TO PROJECT(S)



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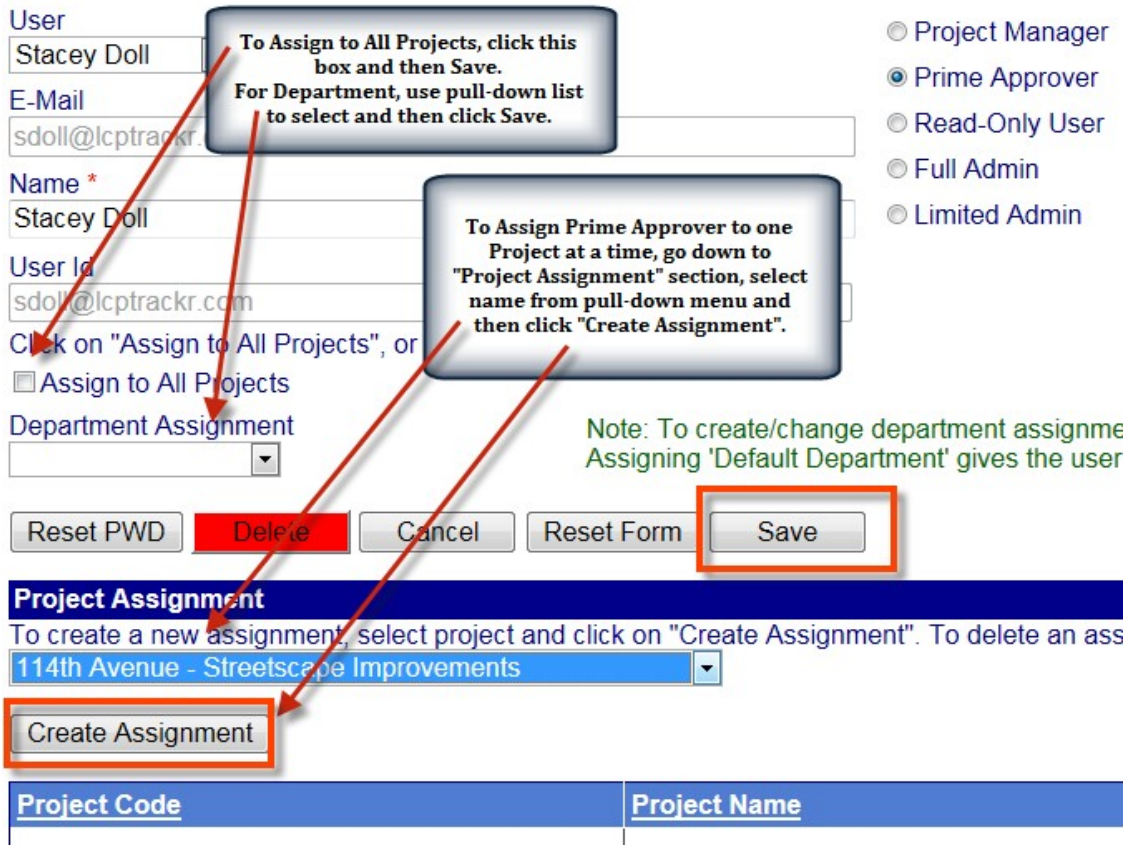

To develop a full understanding of the entire Prime Approver Database it is important that we break down the three main different User Types and then explain the different functions that each of them contain. The life of a Payroll begins with a (1) Contractor/Subcontractor, moves on to the (2) Prime Approver and is then passed to the (3) Lead Administrator. These are the steps to be followed.

VIEW FROM A CONTRACTOR ACCOUNT

Every Prime and Subcontractor has their own **individual Contractor Database in which to enter and submit payrolls.** There is actually very little that changes in a Contractor account when the Prime Approver database is engaged. The **main addition is the column for the Prime Approver Status** (see below) so that a Contractor can see what level their CPR has been reviewed by both the Prime Contractor and the Lead Administrator.

Once a payroll is created and then certified by a Contractor, all CPRs and their current status will be able to be viewed on the main **Projects Tab under the Payroll Certifications bar** toward the bottom of the screen.

To get the CPR list to appear, click on the **"Show Certs" link** in blue on the same row as the project name and **then use** the **drop-down menu below** to choose the date range of submitted CPRs.

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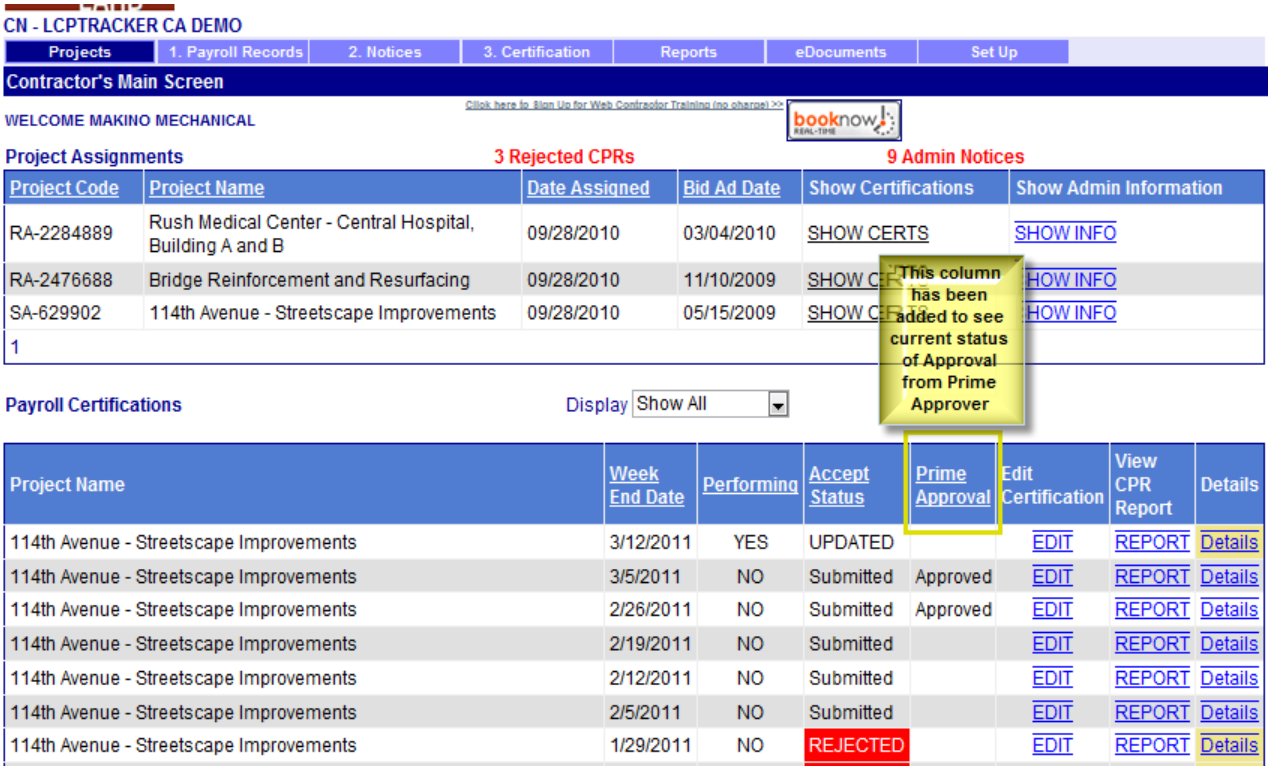
Here is the Projects tab with the submitted CPR list showing for one project:



Note that the "Prime Approval" column is also listed with the **"Accept Status"** column that is to the **left**. The **Prime Approver column will only be empty or marked with "Approved".**

The **Accept Status column,** though, will show one of **six different tags** as shown below:

Status Listing	Who Created Listing	Definition
Submitted	Contractor	This is the default status on original submittal of CPR.
Resubmitted	Contractor	If the CPR was edited by the Contractor and then recertified the status will change to this.
Updated	Contractor	If the CPR's Final/Non-Final status or payroll # was changed by Contractor the listing will say this
Rejected	Prime Approver	If the Prime Approver finds a mistake they may Reject the CPR.
Permit Edit	Prime Approver	A Certified payroll will "lock up" from being edited by a Contractor after a certain number of days set by the Admin. After this # of days the Prime Approver must unlock the CPR with this "Permit Edit".
Accepted	Project Engineer and Staff	This is the "Final and Foremost" status for a CPR. This means that the Project Manager or staff has reviewed the CPR and has Accepted it.

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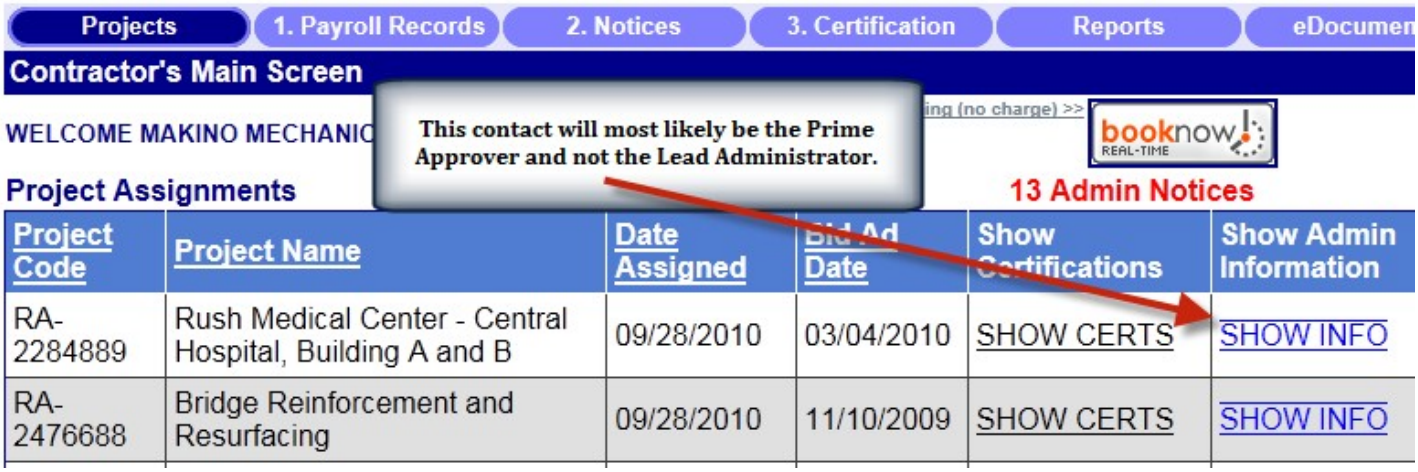
For a Contractor, **the ultimate status of a payroll** is to see **"Approved" and "Accepted"** in the status columns in the payroll table. This means their Prime and Project Engineer or staff have found that payroll is in good standing.

OTHER DIFFERENCES IN A CONTRACTOR ACCOUNT

1) The Admin Contact for a Project will most likely be someone from the Prime Contractor. The Prime Approver's contact info will appear by clicking on the "Show Info" link on the Projects tab.
   They will then be responsible for assisting Subcontractors to answer those questions that LCPtracker Support Staff is legally unable to assist with.



2) The Prime Approver will also take part in **reviewing eDocuments** that the Subcontractors will upload into the system. Most accounts require Subs to submit documents other than CPRs into the system that they may have previously submitted by paper. This may include Fringe Benefit Statements, explanation of Approved Health Plan, Proof of Child Support garnishment, etc.

3) A **Prime Approver may reject a payroll in lieu of the Project Manager** if something is found to still be incorrect at that level.
   Currently in LCPtracker some Project staff are not allowed to have direct communication with Subcontractors. If the Project Engineer or staff find that they need to Reject the CPR of a Sub, they will have the Prime Approver do it for them. If this were to happen, the Prime Approver Status column would say **"Approved"** while the Accept Status column would say **"Rejected" simultaneously.**

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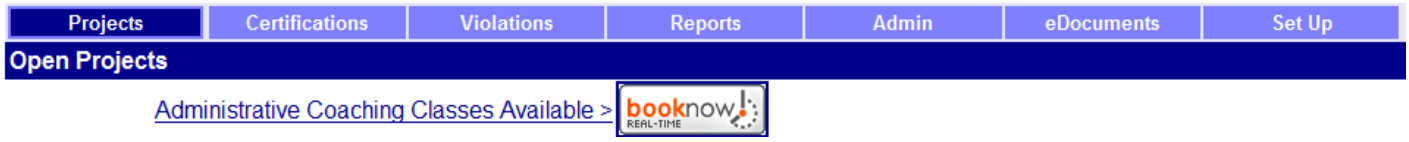
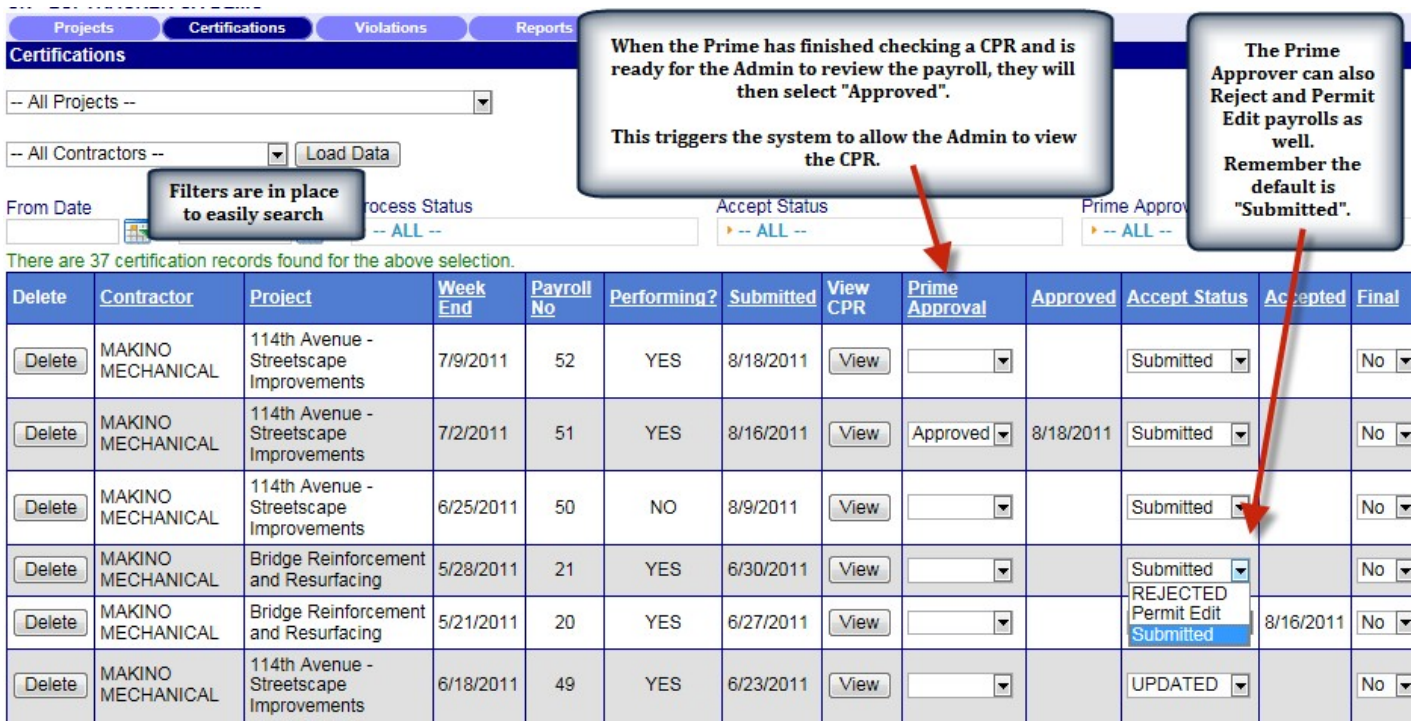
VIEW FROM A PRIME APPROVER ACCOUNT

A Prime Approver will see the same navigational tabs across the top of their screen as the Lead Administrators.



The Certifications Tab is where all payrolls submitted by all Contractors will be found.
This is where the <u>Prime Approver will review and then mark all CPR's as "Approved" so that the Administrators will be able to view them</u>.



If the Prime decides to **"Reject"** a payroll, **a box will pop-up** requiring that a note be typed in the appropriate field so that the Sub will know why the payroll has been rejected.

The Rejection Notice will be logged in the system and **an email will be sent to the Sub's personal email account** notifying them right away.

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THE ADMIN TAB IN THE PRIME APPROVER'S ACCOUNT

Compared to what a Full Administrator can see in the Admin Tab, the Prime Approver's view is quite limited. They will only be able to access two buttons, **Admin Notice Processing and Edit Employees**, though both hold very important roles.

The **Admin Notice Processing button** is like the **"Inbox" of internal emails within LCPtracker** from the Prime Approver, the Lead Admin and from all Subcontractors. This is an important feature in tracking the trail of events for auditing purposes.

Another feature of the Admin Notice Processing tab is to create and send other internal emails to Subcontractors.

The **Edit Employees button** is where the data for all of the employees for all Subcontractors can be found. This may include, but is not limited to, employee name, address, phone number, gender, race, default hourly fringe amounts paid to employee.
Another function that the Prime Approver may play is that of **"Approving Apprentices".** Choosing to Approve Apprentices is up to each Administrator and is regulated by one of the Validation Settings.

More of this feature can be explained in detail in Support Documents found under eTraining. In essence, it means that every Apprentice must be "Approved" in the Admin side of the database before the Subcontractor is allowed **to certify the first payroll for that employee.**

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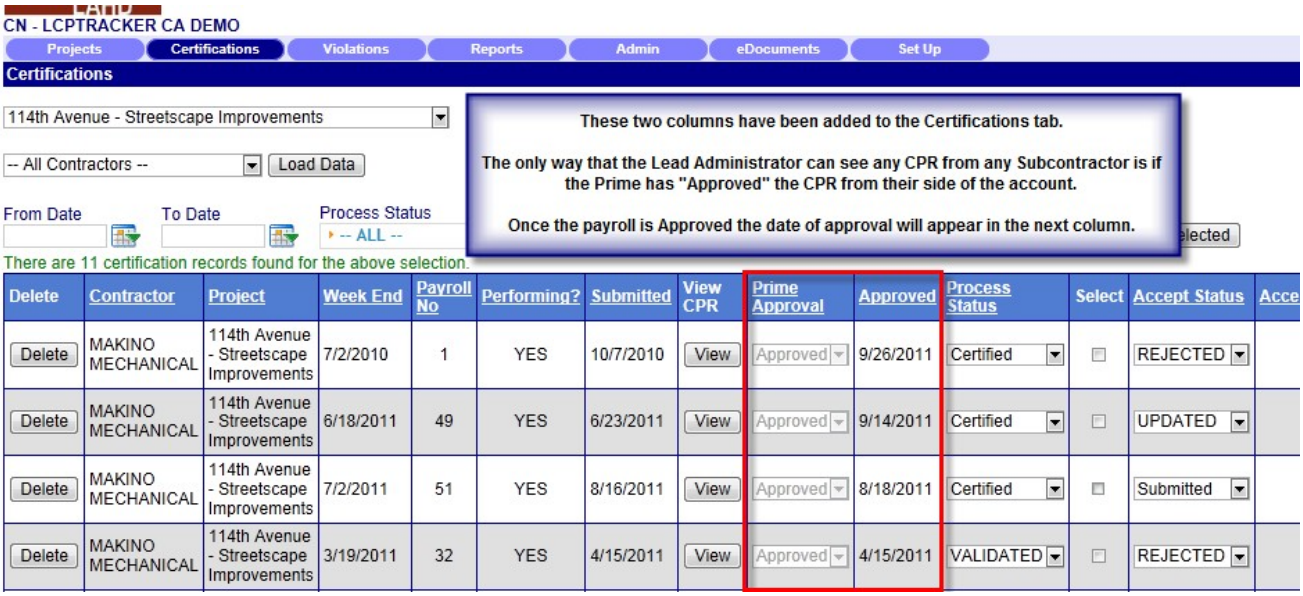
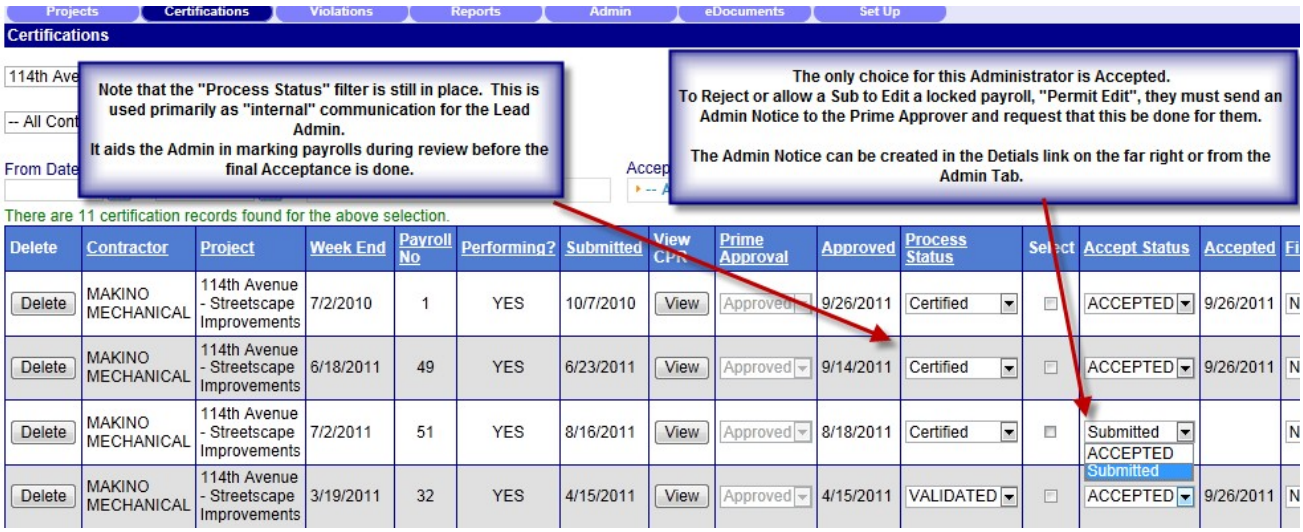
VIEW FROM THE ADMINISTRATOR'S ACCOUNT





To Send the Prime Approver an Admin Notice:

If the Lead Admin wants to Reject a Subcontractor's payroll for some reason, there is currently no way to do that from their side of the account. The Admin must request that this be done by the Prime Approver. So that a clear audit trail is kept, all of the requests are saved within the system as "internal emails" or Admin Notices as they are called in LCPtracker.

The first step is to set up a few Templates for Admin Notices that will allow the messages to be sent to save time in the process as typically Admin Notices are sent repeatedly regarding the same topic. An Administrator with Full Admin Rights can go into their Set Up tab >>> Add/Edit Notice Type to create the templates that can be edited and sent through the system.

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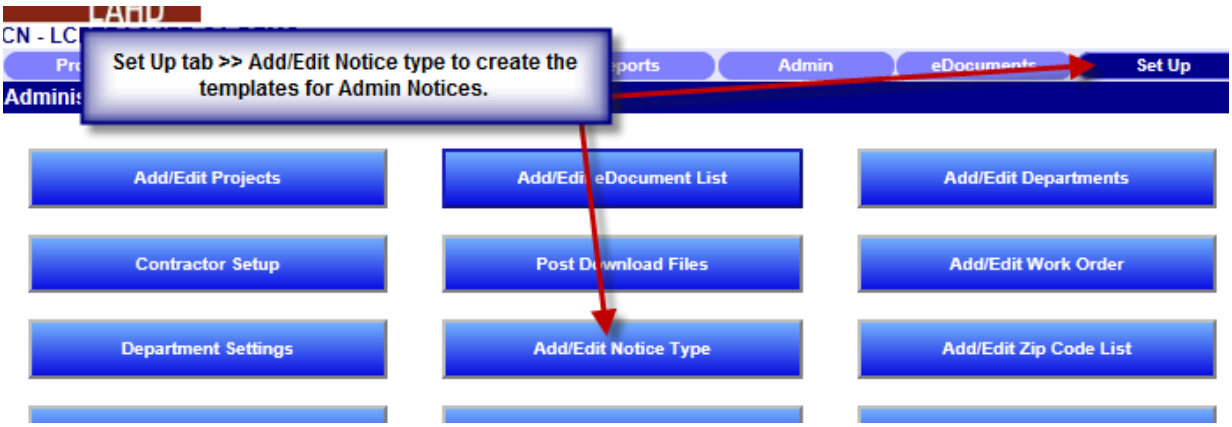

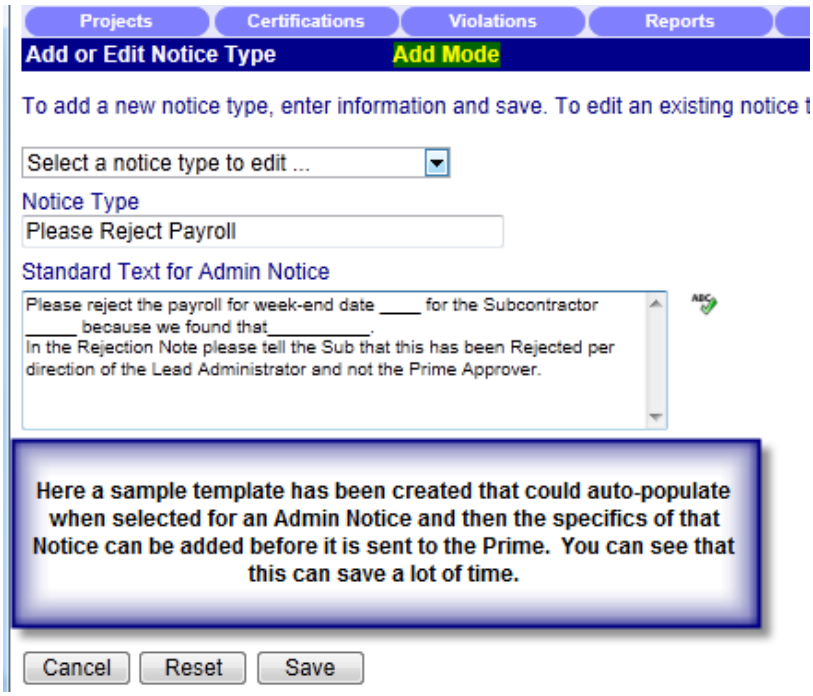

There are two places in the database that an Admin Notice can be generated:

1) In the details link of the Certifications tab for each week's payroll.
   There is a button that says, "**Add Notice".**

2) From the Admin Tab >>> "Admin Notice Processing" button
   Once inside this screen there is a link at the top left of the screen that says **"Add Notice".**
   The filter and table that appears in the Admin Notice Processing Tab is quite valuable in being able to sort through the history of all Admin Notices that have been sent by the Lead Admin and the Prime Approver.

Once "Add Notice" has been selected from either place in the database the Notice to the Prime Approver can be created.

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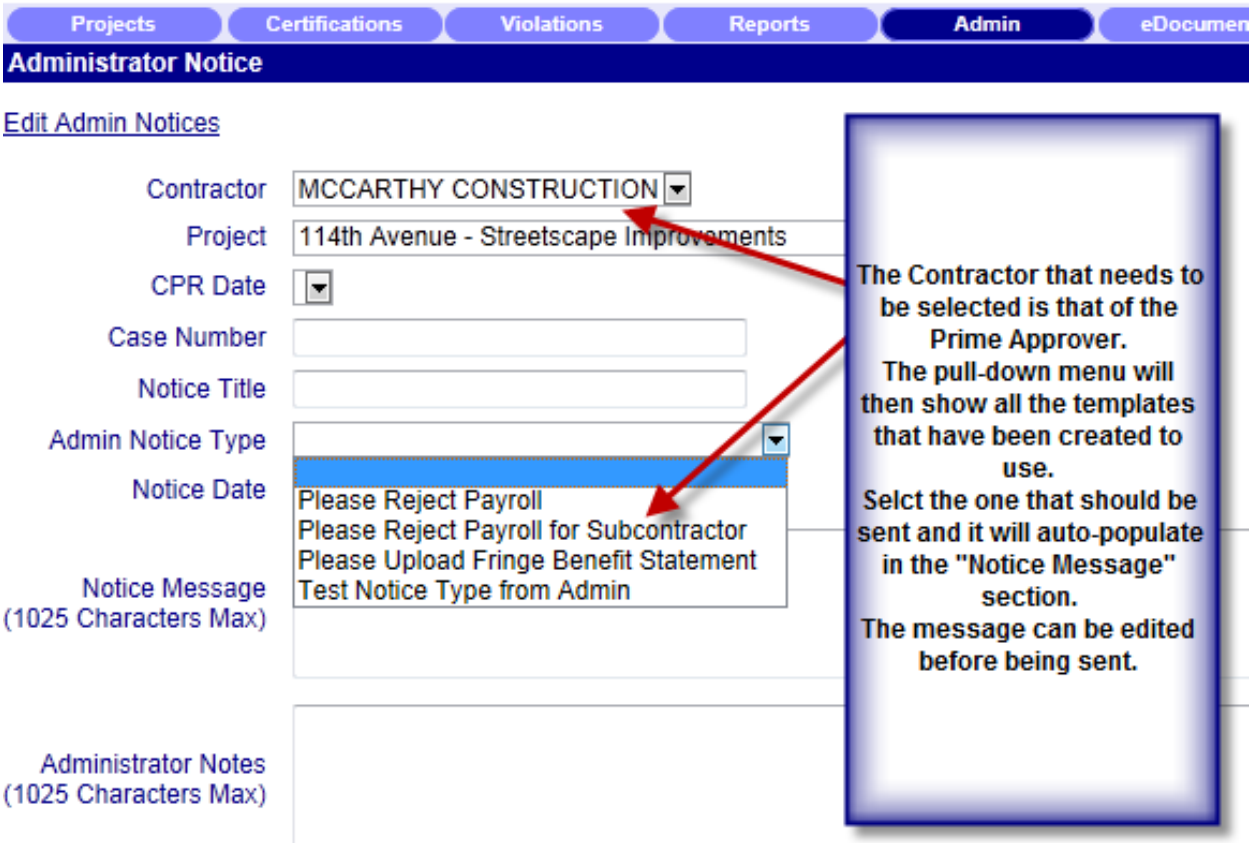

There are three ways for the **Prime Approver to read the Admin Notices** that have been sent to them.

1) An email with a copy of what has been written will be sent to the Prime Approver's personal email account.

2) The Prime Approver also has a Contractor account in LCPtracker where all of these Admin Notices will be sent and stored. LCPtracker recommends that the Prime Approver regularly log into their own Contractor account to look for any missed emails to them.

3) The Prime Approver also has access to the Admin Tab >> Admin Notice Processing button which serves as the "Inbox" for all Admin Notices. They can also use filters to sort easily through the Notices.

The Prime Approver can also respond directly to the Lead Admin within the Account. There are links and fields to create "Contractor Responses" that are also logged directly into the system.

LCPtracker will be constantly performing upgrades and adding new features to our Prime Approver database in the near future. We will keep our clients notified of any changes that will influence your system.

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