Handout # 10

Prime Approver Guide

LCPtracker

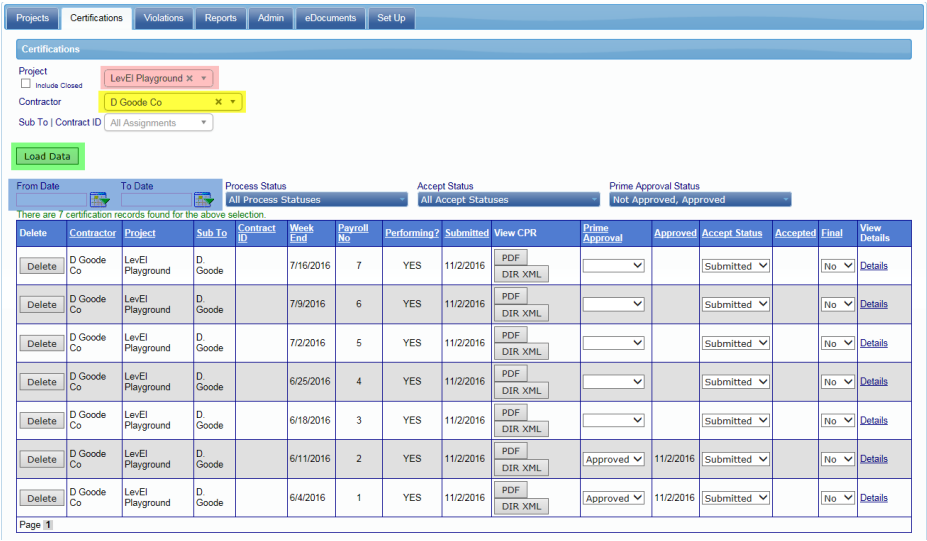
LCPtracker created this “Prime Approver” database feature to offer additional resources and control to Prime Contractors. Primes have the ability to check certified payrolls for their subcontractors to the highest degree before the CPRs are passed on to the top Administrator for final review.

The systematic flow of this database is much like that of what the process has been for submitting paper payrolls. Subcontractors submit their paper payrolls to the Prime for review and then the Prime can review and help the subcontractors fix any payrolls before they are finally sent on to the lead Administrator. It is now the same here in LCPtracker except everything is done electronically.

CERTIFICATIONS

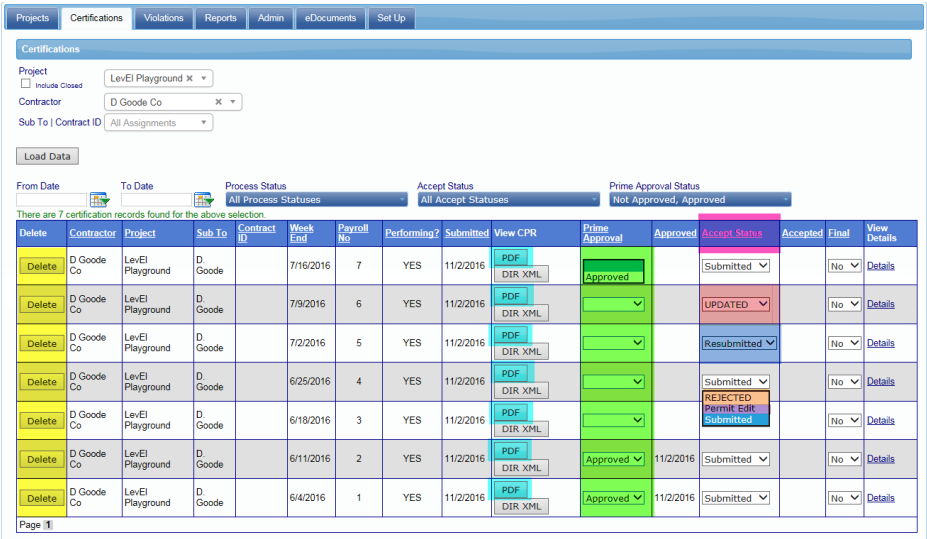
The main tab a prime approver will focus on is the CERTIFICATIONS tab. This is where you’ll be reviewing, and approving or rejecting these payrolls. Once you’ve approved a CPR, it is then available for a full administrator to view the report for a final review. A full administrator does not have access to see any certifications until they have been approved on the Prime Approver level.

You can filter CPRs by **Project**, **Contractor**, and a **date range**. Once you’ve selected any filters, you can click on **Load Data** to bring up your selected CPRs.

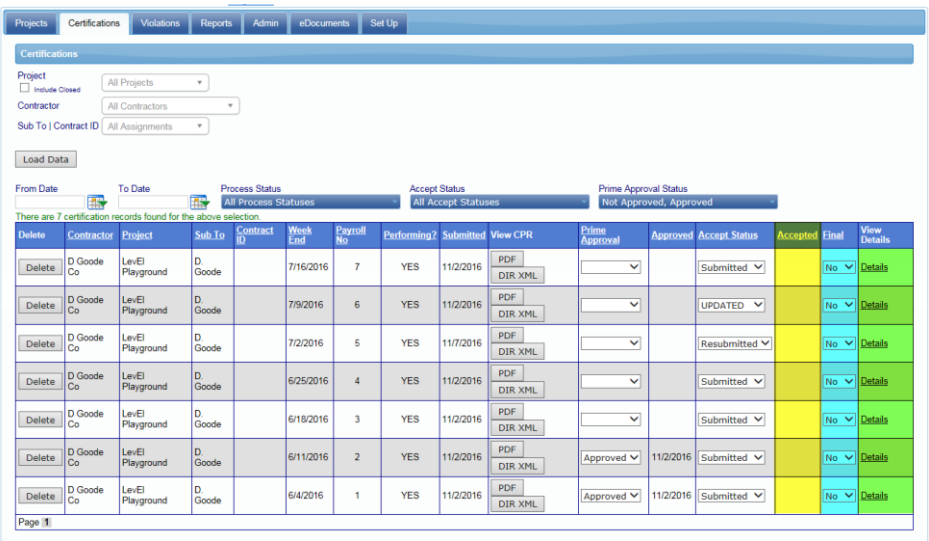


Delete	Contractor	Project	Sub To	Contract ID	Week End	Payroll No	Performing?	Submitted	View CPR	Prime Approval	Approved	Accept Status	Accepted	Final	View Details
Delete	D Goode Co	LevEl Playground	D. Goode		7/16/2016	7	YES	11/2/2016	PDF DIR XML			Submitted		No	Details
Delete	D Goode Co	LevEl Playground	D. Goode		7/9/2016	6	YES	11/2/2016	PDF DIR XML			Submitted		No	Details
Delete	D Goode Co	LevEl Playground	D. Goode		7/2/2016	5	YES	11/2/2016	PDF DIR XML			Submitted		No	Details
Delete	D Goode Co	LevEl Playground	D. Goode		6/25/2016	4	YES	11/2/2016	PDF DIR XML			Submitted		No	Details
Delete	D Goode Co	LevEl Playground	D. Goode		6/18/2016	3	YES	11/2/2016	PDF DIR XML			Submitted		No	Details
Delete	D Goode Co	LevEl Playground	D. Goode		6/11/2016	2	YES	11/2/2016	PDF DIR XML	Approved	11/2/2016	Submitted		No	Details
Delete	D Goode Co	LevEl Playground	D. Goode		6/4/2016	1	YES	11/2/2016	PDF DIR XML	Approved	11/2/2016	Submitted		No	Details

From there you have the ability to:

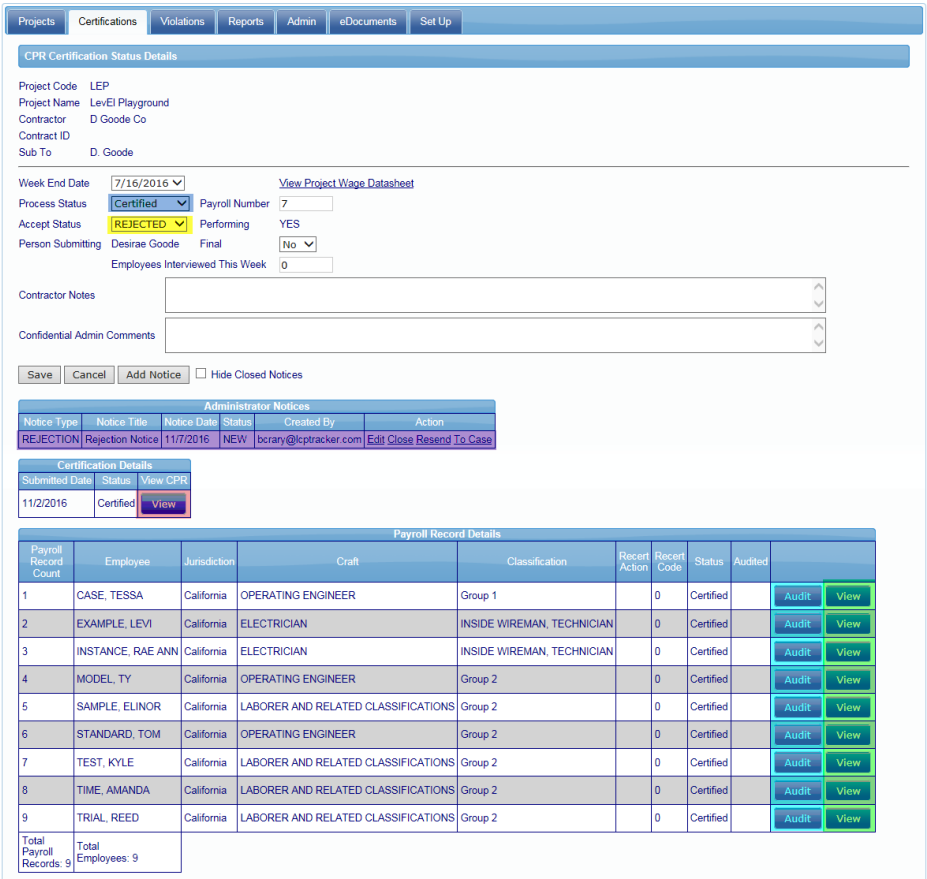


- **Delete CPRs**- the only time you want to delete a record is if a sub entered the wrong week end date or reported to the wrong project; the week end date and project cannot be edited. All other information is editable.
- **View CPRs**- you can take a look at the submitted CPR by clicking on the PDF button
- **Prime Approve**- if the record looks good, you will change the Prime Approval status to APPROVED. The system will stamp the date it was approved
- **Edit Accept Status**-
  - Initially the accept status will be listed as **Submitted**.
  - If the sub went back and made any changes, it will be listed as **Updated** or **Resubmitted**.
  - Sometimes a sub realizes they made a mistake on their record after certifying it. They may try to go back and edit the record, but depending on the allotted edit time, they may not be able to access the record. By changing the Accept Status to **Permit Edit**, you are unlocking the record to allow them to make some changes. They will also receive an admin notice and email informing them that they have been given permission to edit.
  - When you change the status to **Rejected**, you will be asked for a reason or message to send with the rejection. After it's been rejected, the sub will receive an admin notice in their account and an email informing them that the record has been rejected along with your message.



Delete	Contractor	Project	Sub To	Contract ID	Week End	Payroll No	Performing?	Submitted	View CPR	Prime Approval	Approved	Accept Status	Accepted	Final	View Details
Delete	D Goode Co	LevEl Playground	D. Goode		7/16/2016	7	YES	11/2/2016	PDF DIR XML			Submitted		No	Details
Delete	D Goode Co	LevEl Playground	D. Goode		7/9/2016	6	YES	11/2/2016	PDF DIR XML			UPDATED		No	Details
Delete	D Goode Co	LevEl Playground	D. Goode		7/2/2016	5	YES	11/7/2016	PDF DIR XML			Resubmitted		No	Details
Delete	D Goode Co	LevEl Playground	D. Goode		6/25/2016	4	YES	11/2/2016	PDF DIR XML			Submitted		No	Details
Delete	D Goode Co	LevEl Playground	D. Goode		6/18/2016	3	YES	11/2/2016	PDF DIR XML			Submitted		No	Details
Delete	D Goode Co	LevEl Playground	D. Goode		6/11/2016	2	YES	11/2/2016	PDF DIR XML	Approved	11/2/2016	Submitted		No	Details
Delete	D Goode Co	LevEl Playground	D. Goode		6/4/2016	1	YES	11/2/2016	PDF DIR XML	Approved	11/2/2016	Submitted		No	Details

- **Accepted** column- this will display the date the full administrator accepted the record on their end.
- **Final Status**- this will show if that is the sub's final CPR and that they're done with the project. Please keep in mind, changing the Final Status on this end DOES NOT officially change it on the record itself. This is mainly a bookmark for you. The subcontractor will still need to correct this in their account to make it official.
- **Details**-



Projects | Certifications | Violations | Reports | Admin | eDocuments | Set Up

CPR Certification Status Details

Project Code LEP
Project Name LevEl Playground
Contractor D Goode Co
Contract ID
Sub To D. Goode

Week End Date 7/16/2016 — View Project Wage Datasheet
Process Status Certified — Payroll Number 7
Accept Status REJECTED — Performing YES
Person Submitting Desirae Goode — Final No
Employees Interviewed This Week 0

Contractor Notes
Confidential Admin Comments

Save | Cancel | Add Notice | Hide Closed Notices

Administrator Notices

Notice Type	Notice Title	Notice Date	Status	Created By	Action
REJECTION	Rejection Notice	11/7/2016	NEW	bcrary@lcptracker.com	Edit Close Resend To Case

Certification Details

Submitted Date	Status	View CPR
11/2/2016	Certified	View

Payroll Record Details

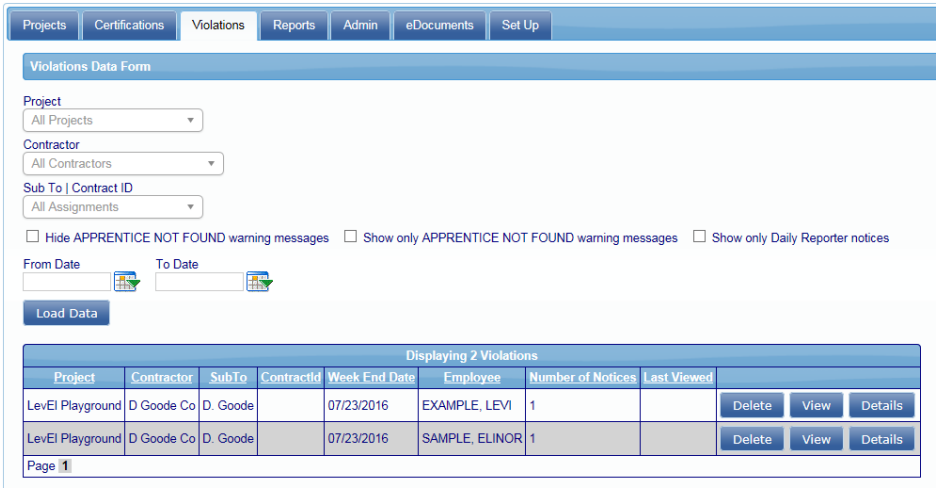
Payroll Record Count	Employee	Jurisdiction	Craft	Classification	Recert Action	Recert Code	Status	Audited		
1	CASE, TESSA	California	OPERATING ENGINEER	Group 1		0	Certified		Audit	View
2	EXAMPLE, LEVI	California	ELECTRICIAN	INSIDE WIREMAN, TECHNICIAN		0	Certified		Audit	View
3	INSTANCE, RAE ANN	California	ELECTRICIAN	INSIDE WIREMAN, TECHNICIAN		0	Certified		Audit	View
4	MODEL, TY	California	OPERATING ENGINEER	Group 2		0	Certified		Audit	View
5	SAMPLE, ELINOR	California	LABORER AND RELATED CLASSIFICATIONS	Group 2		0	Certified		Audit	View
6	STANDARD, TOM	California	OPERATING ENGINEER	Group 2		0	Certified		Audit	View
7	TEST, KYLE	California	LABORER AND RELATED CLASSIFICATIONS	Group 2		0	Certified		Audit	View
8	TIME, AMANDA	California	LABORER AND RELATED CLASSIFICATIONS	Group 2		0	Certified		Audit	View
9	TRIAL, REED	California	LABORER AND RELATED CLASSIFICATIONS	Group 2		0	Certified		Audit	View
Total Payroll Records: 9	Total Employees: 9									

- In this section, you have the ability to
  - change the **Process Status** or **Accept Status**
  - send and review **Admin Notices**
  - **View** CPRs, including their superseded versions
  - Under Payroll Details you have the option to
  - **View** the actual record as it looks when the subcontractor entered it. **Audit** is the same as View, it just makes it official. It will stamp that you've viewed or audited the record. In the payroll record, you can click on Revalidate at the bottom to refresh the record and make it go through all checks and balances again.

As the prime approver, you are mainly spot checking the records that have been turned in; looking for an out of sequence payroll number or maybe they marked it final when it shouldn't have been. For the most part, when a contractor user makes a mistake on their record, or if they're not paying the required minimum rate for the craft they've selected, they'll receive notices that will prevent them from certifying. You'll be looking for things that may have fallen through the cracks.

VIOLATIONS

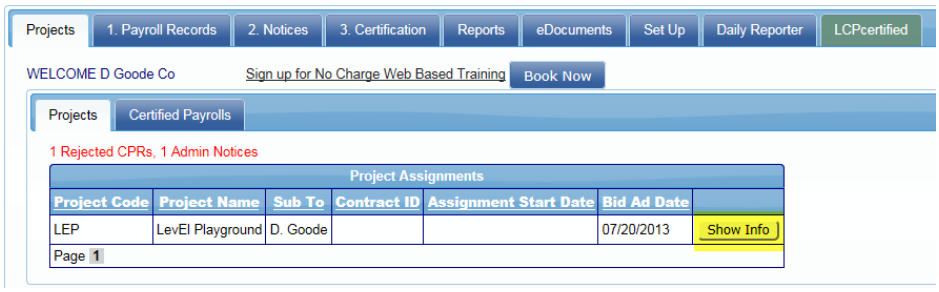
Any notices or warnings that exist when the Contractor submits the CPR are listed in the Violations tab. Administrators can review these potential violations, take action, or delete as needed.



A common warning that can be seen on this tab is VAL_52, Total deductions are greater than check amount. A warning, for the most part, will not prevent certification. Validations can be set to notices or warnings by a full administrator.

PROJECTS

Within your Projects tab, you'll see the projects you've been assigned to oversee. As you may know, for each contractor that is assigned to the project, within their account they have a **Show Info** button next to the project name.



This will usually display your contact information. There may be times when they contact Support, and we will need to refer them to who we call their Project Administrator. Some of those situations include

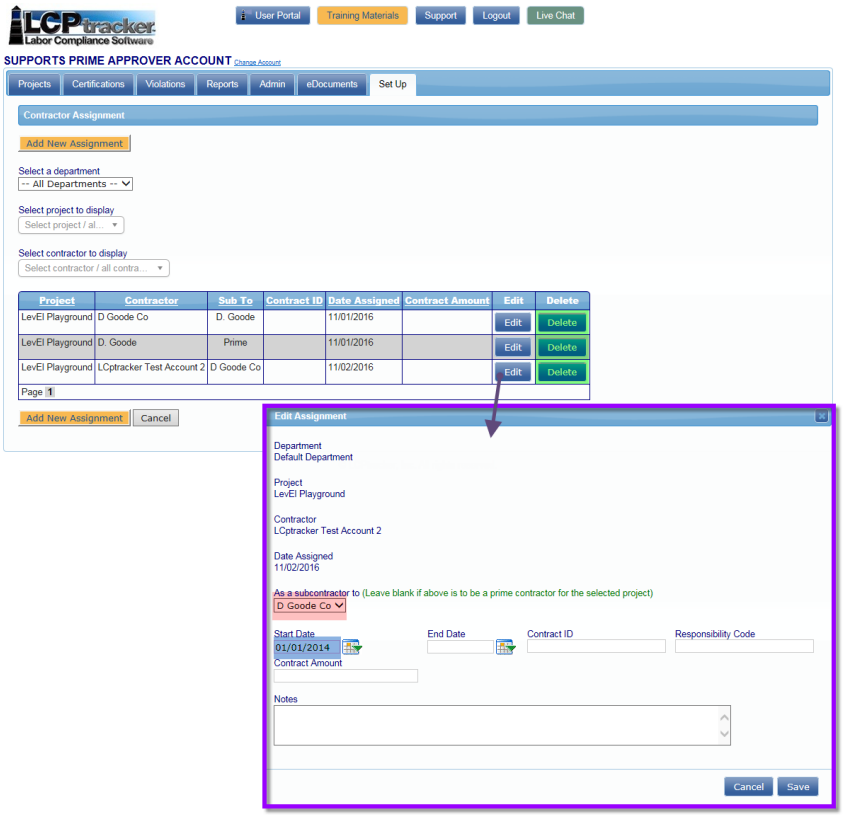
apprentice approval, or if they need permit edit to access a certified record and make changes to their CPR.

SET UP

The only buttons available in your Set Up tab are Contractor Setup and Change Password.

Contractor Setup

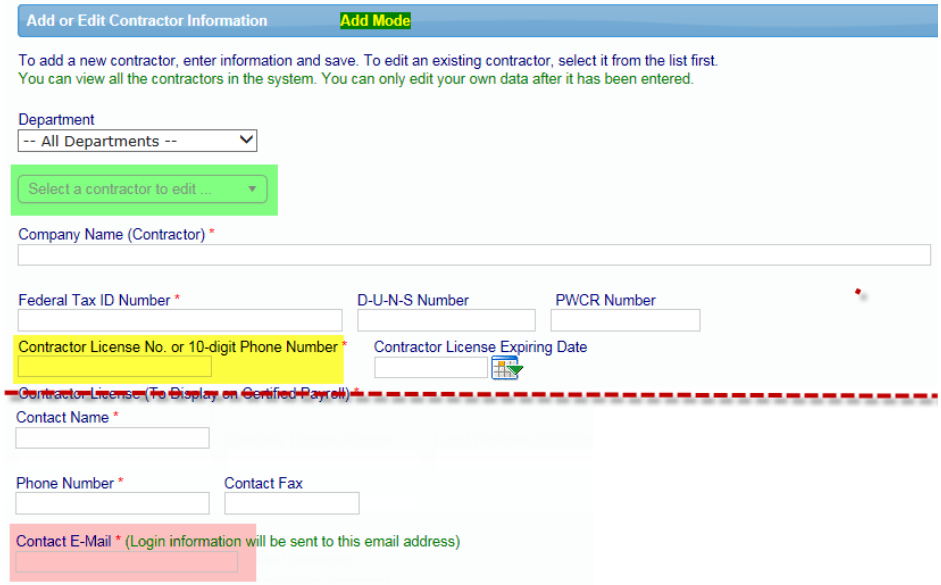
As the prime, you will first set up the subcontractor below you. Each contractor is responsible for setting up their own subs. Once you've set up your sub, they'll log into their account and then set up any subs beneath them. Their subs will then set up their own subs, and so on and so forth. You do have the ability as the prime to set up all subcontractors on the project as well. That is ultimately up to you, but for the most part, each contractor is responsible for setting up their own subs.



Under Set Up > Contractor Setup > Contractor Assignment, you also have the ability to **remove a sub from a project**, **adjust the tiers** (as far as who is a sub to who), and you can **adjust the sub's start date**.

Contractor Set Up is a two-step process:

Step 1: Contractor Setup > Add/Edit Contractor



To add, simply fill in the data. Complete the data fields with information provided by your subcontractor. If it is a new entry, ignore the **Select a contractor to edit drop down**. If this is an existing user, you can edit their information once you've selected them from the drop down.

Some contractors may already be a user of LCPtracker under another agency database. Ask your subcontractor if they are a current user of LCPtracker. If they are, ask them for their User ID that they currently use to log into the LCPtracker system. You will still be setting this company up with a "new" account under the Agency you are working in. Set them up with the same user ID under your Agency, and the system will automatically link their accounts for them. This prevents them from having to use multiple user ids.

The field marked **Contractor License No. or 10-digit Phone Number** is the field that ultimately becomes the user's ID number, and where you'll enter their existing user ID to link accounts if they have them.

Continue to enter in the rest of the required information on the Contractor Setup page and **Save**

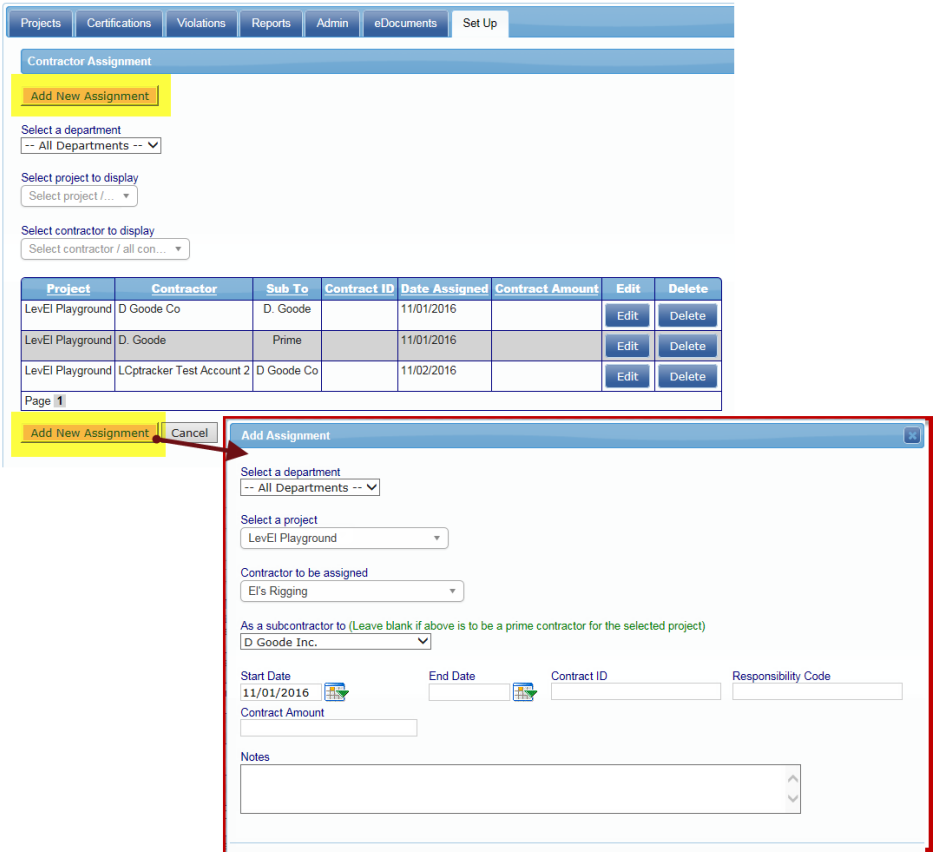
The ***email data field is critical*** as this is how the LCPtracker Program is designed to communicate with system users. Please be sure the email address supplied is correct prior to saving the information to the database. Red asterisks fields are required in order for the system to **Save** information. Some Agencies may have additional requirements. When you are satisfied the information is correct, click **Save**. You will receive a pop-up telling you "Contractor has been sent an email notifying them. Don't forget to assign this Contractor to project".

LCPtracker system will automatically email the subcontractor their User ID and Temporary Password.

Step 2: Contractor Setup > Contractor Assignment

The next step after you have setup your subcontractors in the system is to assign them to the project(s).

You can click on **Add New Assignment**, on the top or the bottom



Select a department – *Optional*, some agencies do not use this selection. You may choose the 'Unassigned Contractors" to make the list shorter to view.

Select a project – You need to choose the Project that you are assigning your Subcontractor to.

Contractor to be assigned – Choose the Subcontractor you need to assign to Project as your Subcontractor. This is usually the Subcontractor you just set up in the system. Some however are

already in the system under this Agency and you just need to assign them to the Project as your Subcontractor. (See next screen shot).

As a subcontractor to – Choose which contractor they are a sub to, or leave it blank if they're a prime

Start Date – Required by some Agencies, typically the date that your Subcontractor is to/or has started working on the project.

End Date – *Optional field*, some agencies want this information.

Contract ID – *Optional field*, some agencies want this information. The Contract ID is the ID of the contract between you and the subcontractor. If you do not have a Contract ID or numbering system be sure to assign a unique ID to this contract.

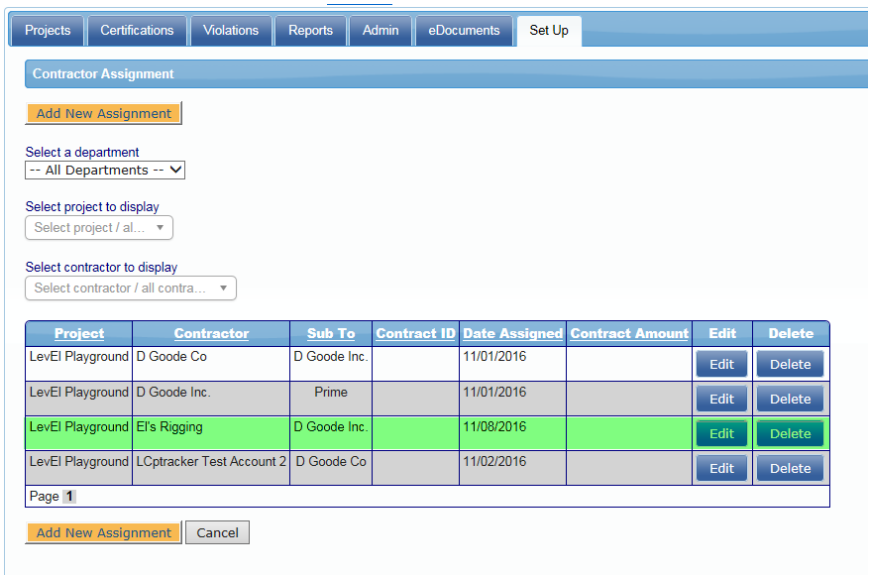
Responsibility Code – *Optional field*, some agencies want this information.

Contract Amount – *Optional field*, some agencies want this information. This is the amount of the contract between you and your subcontractor.

Notes – *Optional field*, some agencies want this information or you may choose to add your own notes.

After you have made your choices from the drop down and entered any required information, be sure to Save.

You will now see a saved **contractor assignment** list in the Contractor Assignment Screen. The Date Assigned is a system generated Date Stamp. This is the date that the Contractor was assigned to the project.

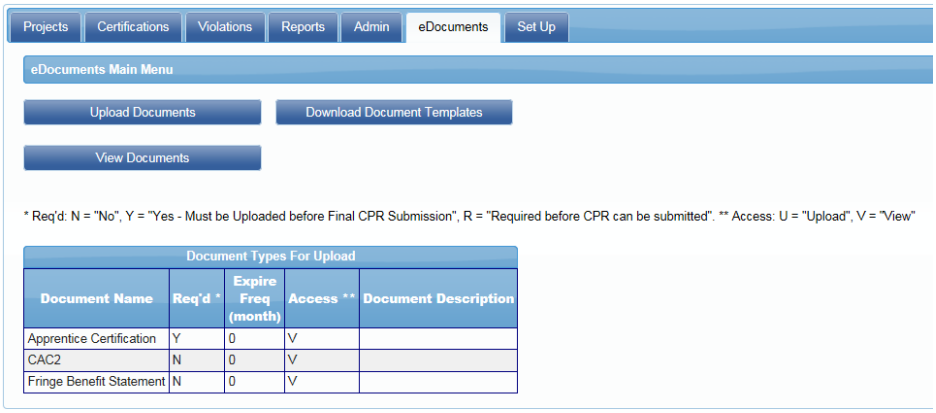


Change Password

You can change your password at any time. You must follow the password rules – more than 6 characters, less than 20, must contain at least one capital letter and one lowercase letter. LCPtracker recommends that you create a password with the following characteristics – at least 8 characters long, contains at least one uppercase and one lowercase letter, one digit (0-9) and one special character (@#$%^&+=).

EDOCUMENTS

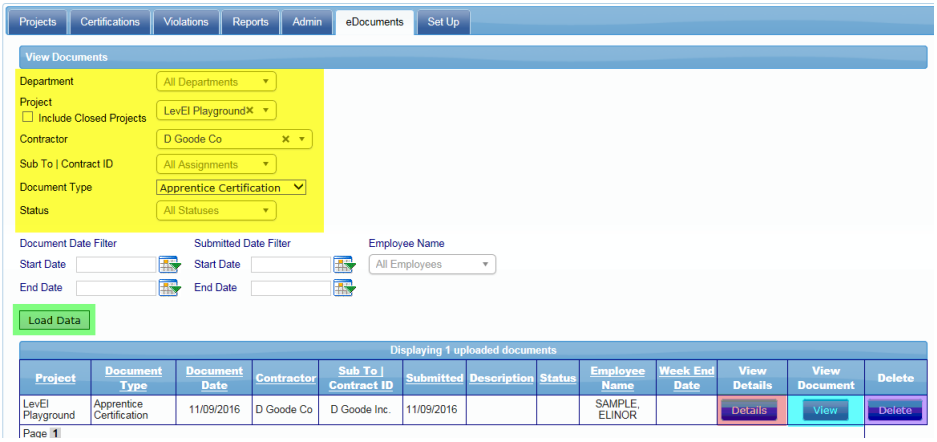
In the eDocuments tab, you can see a table with a list of document types available for upload:



A full administrator maintains all eDocument requirements. If there aren't any documents displayed, this is not a section you'll need to worry about.

View Documents

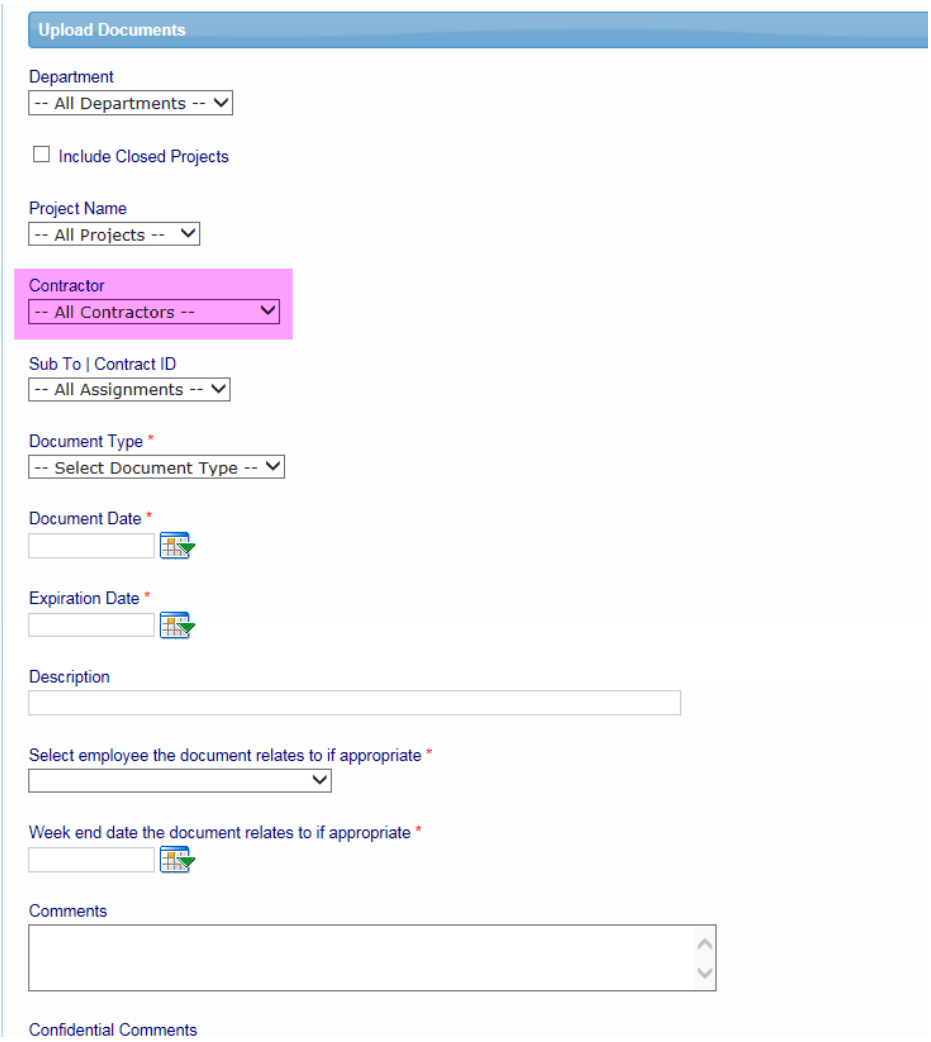
You can view all documents that a subcontractor has submitted by going to eDocuments > View Documents.



There are many **filters** you can utilize to narrow down your search. Once any filters have been selected, you'll click on **Load Data** to bring up any documents. **Details** will show you the details of that specific document. Clicking on **View** will open up the actual document uploaded. You also have the ability to delete the document by clicking on the **Delete** button.

Upload Documents

If desired, you are able to upload a document for a specific subcontractor. To do this, you'll go to eDocuments > Upload Documents. You'll just be sure to upload to the **contractor** specifically that the eDocument is for. For the most part, the only time you will upload a document within your Prime Approver account is if you want to help out a subcontractor who is having difficulty uploading it themselves.

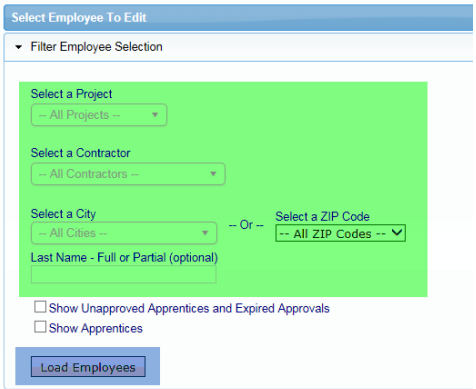


ADMIN TAB

The buttons you'll find under the Admin tab are Edit Employees and Admin Notice Processing.

Edit Employees

You can filter down by a **project, contractor, city, zip codes,** or **an employee's last name**. You can also just **Load Employees**. If you have a lot of subcontractors, you may wish to use a filter to make the drop down list more manageable.



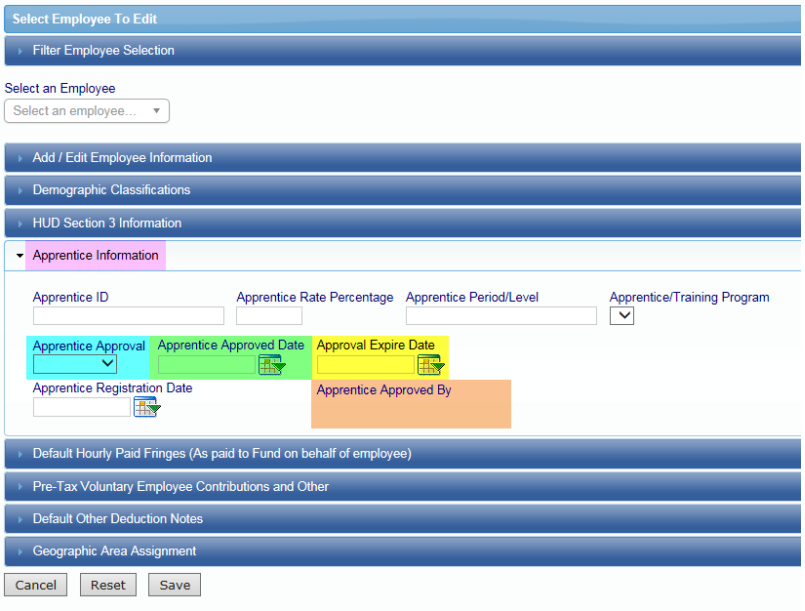
For most, the **Apprentice Information** section (to approve an apprentice) is what you will deal with.

**** Please be sure to check with your full administrator to see if you're the one that should be approving apprentices! Some admins require that they approve apprentices on their end! ****

To "approve" an apprentice you will need to choose/fill in the following fields –

- **Apprentice Approval**
- **Apprentice Approved Date**
- **Apprentice Expire Date**

Apprentice Approved By will auto-populate with the administrator's user ID

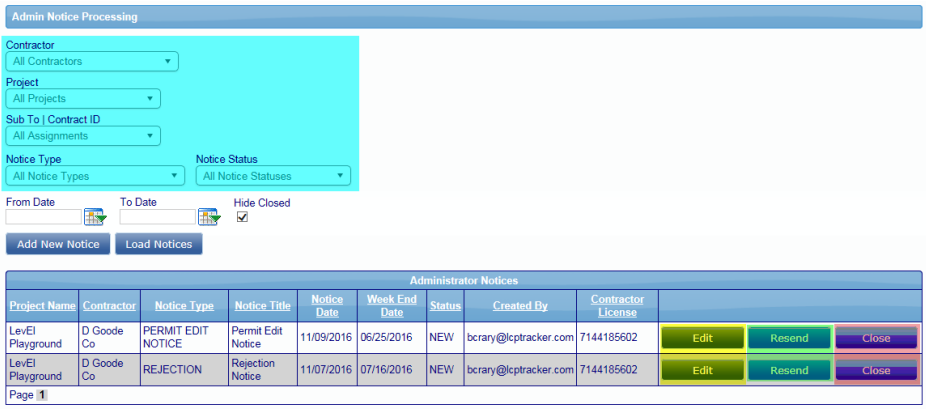


Admin Notice Processing

Administrator notices are basically messages that you can send out to the subcontractors. Most of these notices are automatically sent out, such as when you reject a payroll or grant them permit edit.

View admin notices

There are **multiple filters** you can use to narrow down the admin notices you're looking at. The buttons to the right of each notice will allow you to

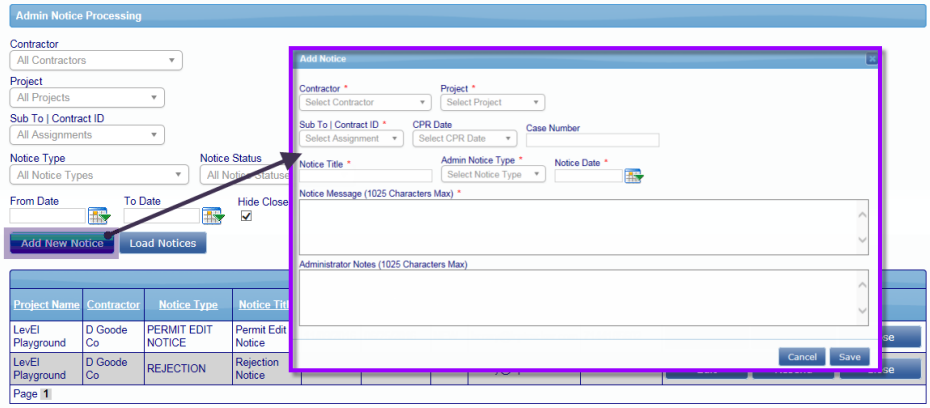


- **Edit**- this will give you the ability to add additional notes to the admin notice, however you cannot edit the previously entered message
- **Resend**- this will resend the original email to the subcontractor
- **Close**- this will remove the notice from the subcontractor's account

Again, most admin notices are automatically generated, so you won't be sending too many notices from here.

Add admin notices

You can create an admin notice by clicking on **Add New Notice**. Fill out the required information and also be sure to include the Notice Message you'd like the subcontractor to receive. When an admin notice is generated, an automatic email is also sent to the subcontractor with the same message.



If you have any further questions with anything covered in the manual, please feel free to reach out to our Support department at 714-669-0052 option 4 or support @lcptracker.com.