

MWRD Vendor Guide to PRISM Compliance Management

Primes & Subs





Disclaimers

Copyright

The information contained herein constitutes proprietary and confidential information of Early Morning Software, Inc. (EMS). It must not be copied, transmitted or distributed in any form or by any means, electronic, mechanical, or other, including photocopy or recording, or through any information storage or retrieval system, without the express written permission of EMS.

Printed Material

Occasionally you may witness slight variations between what is printed or online with what is on PRISM screens. PRISM Compliance Management (PCM) reserves the right to alter PRISM screens in order to enhance the user experience.

Please report any difference to PCM for review and remediation. Your cooperation is appreciated



AGENDA

Primes & Subs



I. Introduction

II. User Registration

III. Compliance with PRiSM

- Sub Invoice Submission
- Prime Sub Payment
- Payment Acknowledgement/Dispute
- Monthly Reporting Requirements

IV. Getting Help

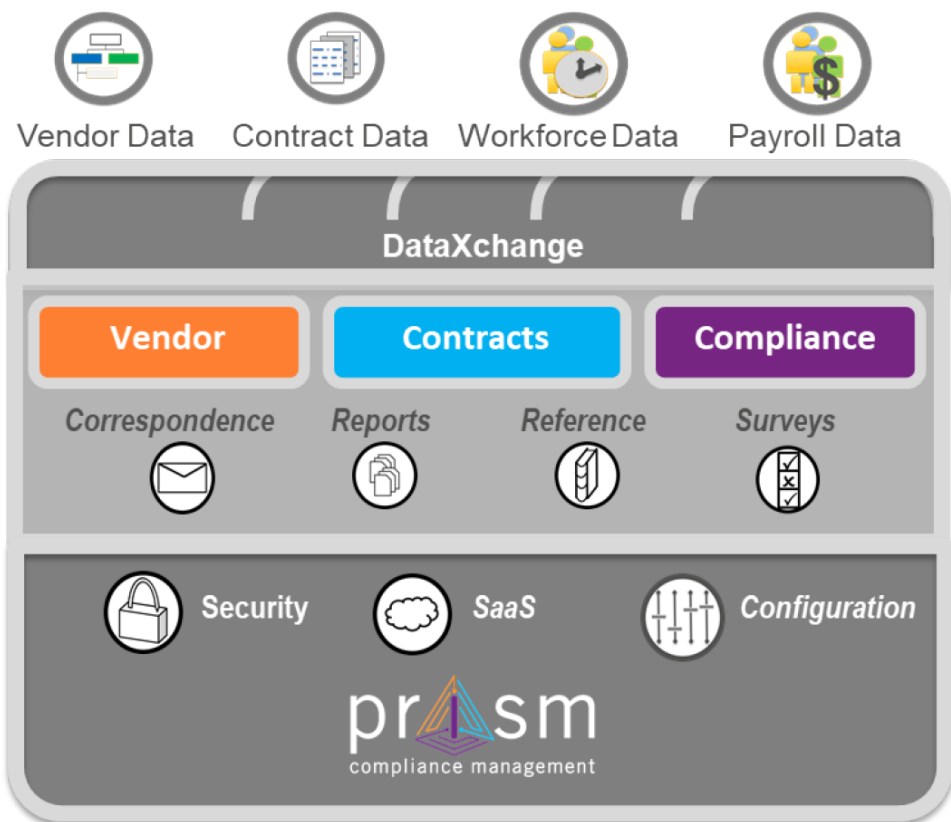
V. Wrap Up





What is PRISM?

PRISM Compliance Suite



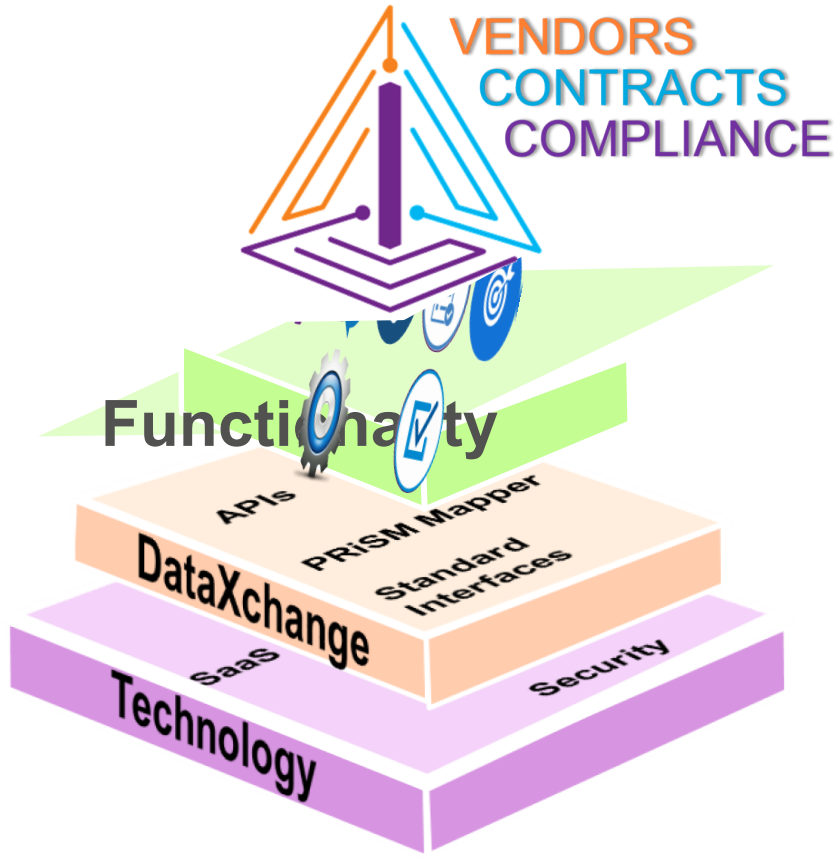
A modular solution with capabilities to solve your compliance management challenges.


PRISM is a full function SaaS application that increases the effectiveness and efficiency of compliance with robust information and industry best practice processes.





Full Compliance Suite



-  ***Superior User Interface***
-  ***End-to-End Compliance***
-  ***Robust Data Management***
-  ***Modern Architecture***



Why PRISM

- PRISM facilitates diversity inclusion
 - Collection
 - Tracking
 - Reporting of and outreach efforts
- PRISM enables on-line vendor searches and target outreach

Resulting in increased Small Business participation, more timely payments and improved goal attainment.

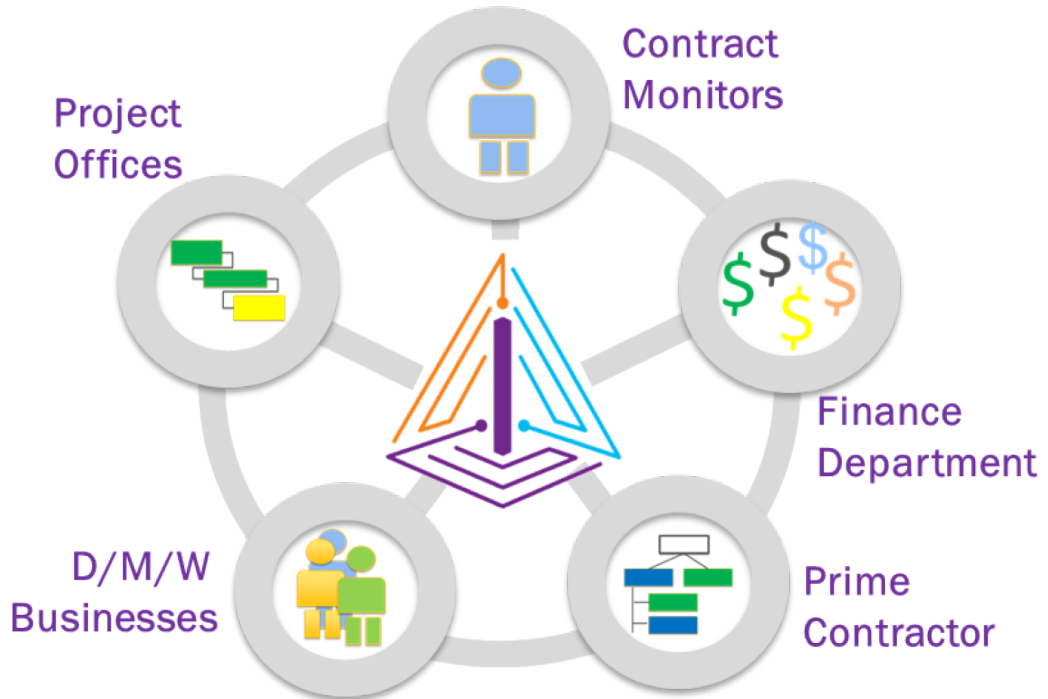


Closed-Loop Acknowledgement™

Closed-Loop Acknowledgement and reporting ensures highest quality participation and the achievement of results.

You are integrated into the PRISM online process

Each group can add information and see the big picture





End-to-End Compliance



Award

Contract and Sub Contract participation Plan is entered into the system by your Jurisdiction.



Setup

Prime and Subcontractor are notified of award and set up PRISM accounts.



Compliance

Prime and Subcontractor perform work and submit compliance requirements using PRISM Closed-Loop-Acknowledgement process.



Monitor

Jurisdiction monitors compliance.

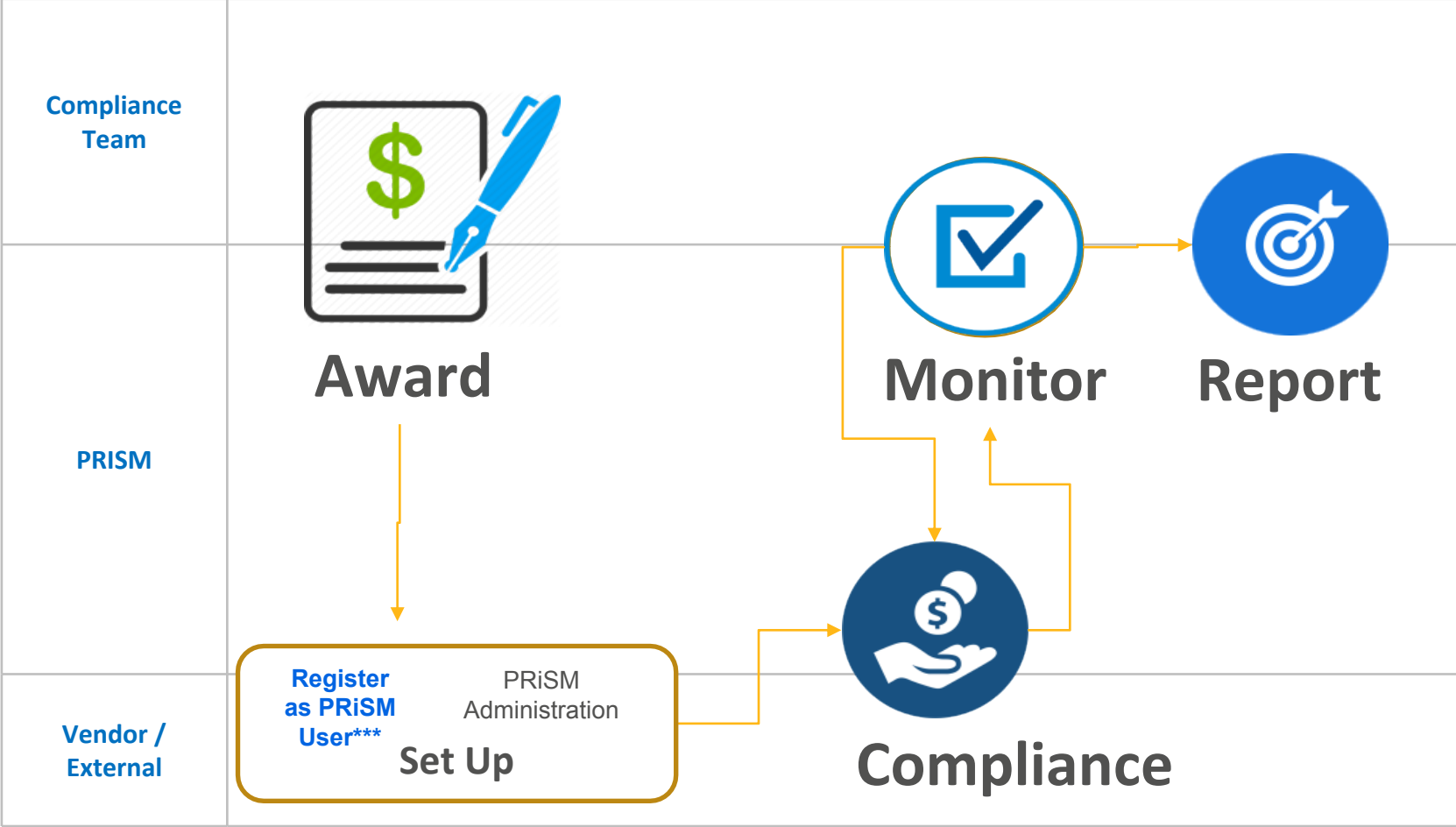


Complete

Contract is completed.



Process Overview



***All Vendors are required to set-up a PRISM vendor account to login to do compliance



User Registration

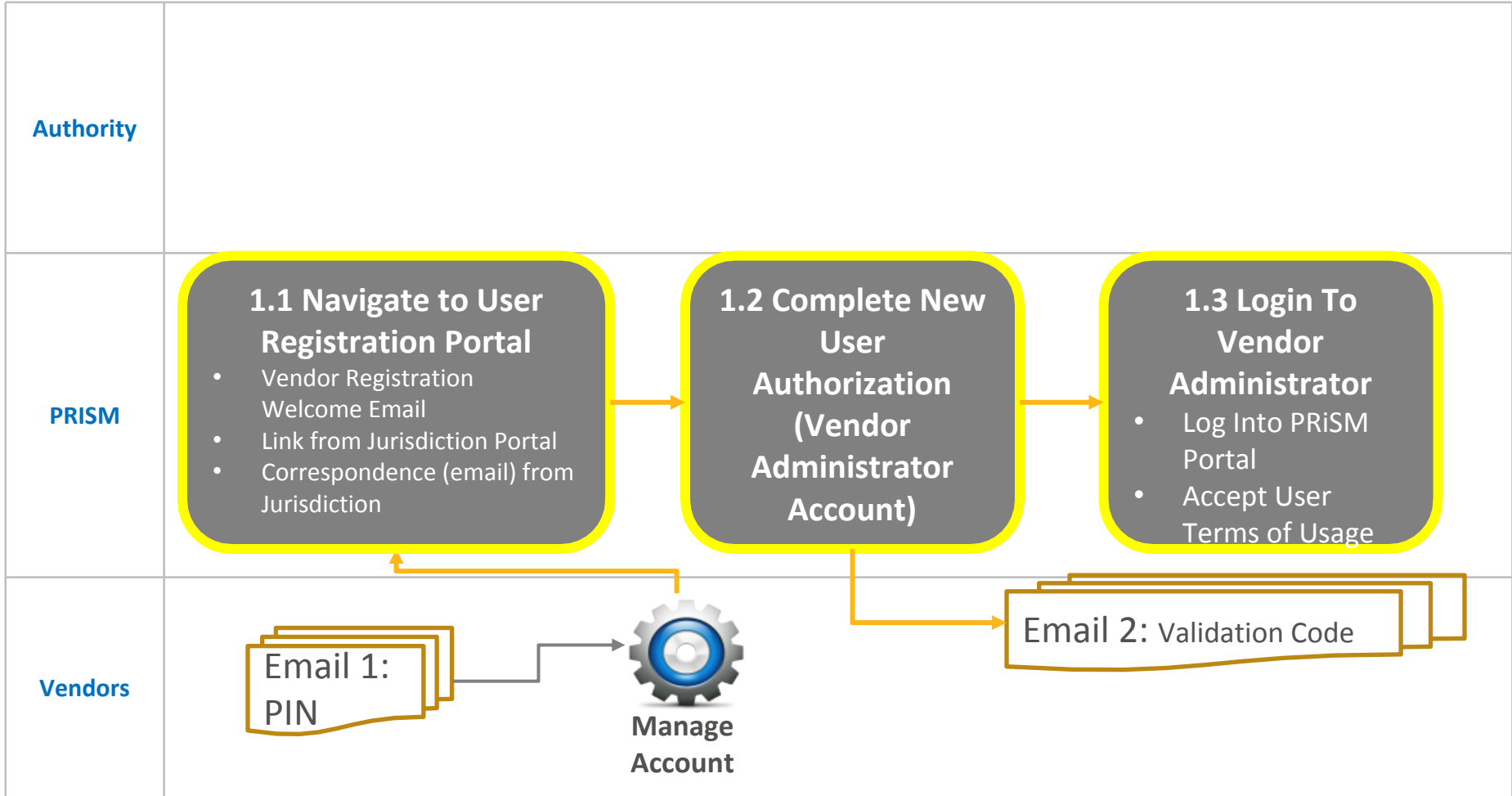


User Registration

- PRISM will create a Master Default Vendor account when a Vendor is entered into the PRISM database from MWRD Supplier portal
- The Default Vendor User must know their EIN and **PIN** to Claim the Default Account
- *Jurisdiction would provide you a Cheat Sheet for this process*



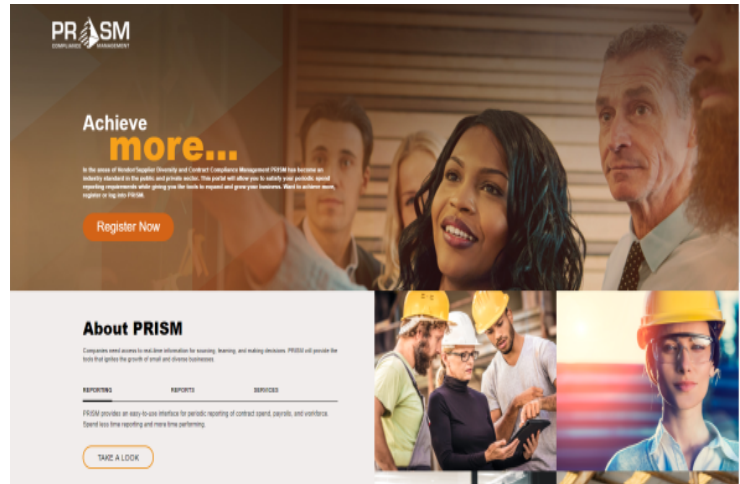
1) Claim Vendor Administrator Account





1.1 Navigate to User Registration Portal

Your Jurisdiction will send you a link to the PRiSM User Registration Page.



<https://userregistration.prismcompliance.com/>



1.2 Complete New User Authorization (Vendor Administrator Account)

1) Identify yourself with EIN and PIN

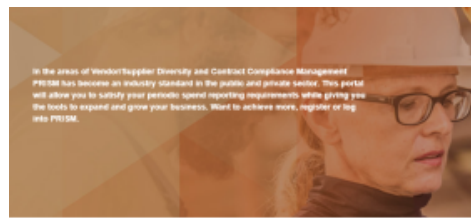
2) Confirm Identity

3) User Information and Email Validation

4) Set User Name, Password and Hints

5) Accept Terms of Usage

6) Complete Process



Welcome to Prism
Registration Completed Successfully



1.3 Login To Vendor Administrator

a) Login

prism
compliance management

Log in here!

Enter Username here...

Enter Password here...

Need Log In Help?

Log in

b) Reset Password on first login

prism
compliance management

The password is expired. Enter a new password.

Change Password

New Password

Confirm Password

Submit Cancel

c) Accept Terms of Usage

Terms of Usage

By accessing or using the site, information, materials and data contained in the City of Emerald's web pages, you hereby agree to accept the following terms and conditions set forth below. The City of Emerald shall not be held liable for improper or incorrect use of the information, data, materials, processes, products or apparatus, described and/or contained herein. These data, information, materials, processes, products, apparatus and related graphics are not legal documents and are not intended to be used as such. The user recognizes and acknowledges that the information contained in the City of Emerald's web pages was developed by the City of Emerald for a specific purpose or is used by the City of Emerald in a specific manner, and this information may be inaccurate or available for other purposes. The City of Emerald is not responsible for your use or reliance on the information. The user hereby recognizes that the information, data, materials, processes, products, apparatus are dynamic and may change over time without notice. However, the City of Emerald makes no commitment to update the information, data, materials, processes, products or apparatus contained herein. All information, including but not limited to data, software, apparatus, products, processes and materials contained herein is provided "as is" without warranty of any kind. The City of Emerald does not warrant, guarantee, or make any representations regarding the use, or the results of the use, of the information provided to you by the City of Emerald in terms of correctness, accuracy, reliability, completeness, usefulness, timeliness or otherwise. The entire risk as to the results and performance of any information obtained from the City of Emerald is entirely assumed by the recipient. Any person who uses any information available from the City of Emerald disclaims all liability for damages, costs and expenses and AGREES THAT THERE ARE NO REMEDIES FOR NEGLIGENCE, OR UNDER STRICT LIABILITY, OR FOR BREACH OF WARRANTY OR CONTRACT, INCLUDING BUT NOT LIMITED TO INDIRECT, CONSEQUENTIAL, PUNITIVE OR INCIDENTAL DAMAGES, EVEN IF YOU GIVE NOTICE OF THE POSSIBILITY OF SUCH DAMAGES. Due to the possibility of unauthorized access to the data, transmission errors or changes made since the last update to the website, the information should not be deemed reliable for legal purposes. It is strongly recommended that these data and materials be acquired directly from the City of Emerald and not through other sources which may have changed the data in some way. Although these data have been processed successfully on a computer system at the City of Emerald, no warranty expressed or implied is made regarding the ability of the data on another system or for general or scientific purposes, nor shall the act of distribution constitute any such warranty. This disclaimer applies both to individual use of the data and aggregate use with other data. Information, data, materials, processes, products or apparatus accessible via the City of Emerald's web pages may contain live references (hyperlinks) to information, data, apparatus, products, processes or materials held on networked information servers beyond the City of Emerald's web pages, and some of the information may be copyrighted with restrictions on reuse. The City of Emerald has no control over, and is not responsible for, the contents of any off-site material referenced from hyperlinked documents accessible via the City of Emerald's web pages. The City of Emerald cannot control and makes no warranty, or guarantee, or promise, express or implied, that the information, data, apparatus, product, process or material accessible via the hyperlinks contained on the City of Emerald's web pages is either relevant, accurate, complete, up to date, or fit for any use whatsoever, nor represents or implies that its use will not infringe privately held rights. Links to external servers (other than the City of Emerald web host/server) do not imply any official City of Emerald endorsement of the opinions or ideas expressed therein, or guarantee the validity or importance of the information provided. Furthermore, any person who accesses information, data, apparatus, products, processes or materials via hyperlink text contained on the City of Emerald's web pages disclaims all liability for damages, costs and expenses, and agrees that there are no remedies for negligence, or under strict liability, or for breach of warranty or contract, including but not limited to indirect, consequential, punitive or incidental damages, even if notice was given of the possibility of such damages. Reference herein to any specific commercial products, process or service by trade name, trademark, manufacturer, or otherwise does not necessarily constitute or imply its endorsement, recommendation, or favoring by the City of Emerald. The views and opinions of authors expressed herein do not necessarily state or reflect those of the City of Emerald and shall not be used for advertising or product endorsement purposes. Use of any information obtained on this website is voluntary and reliance on it should only be undertaken after an independent review of its accuracy, reliability, completeness, usefulness and timeliness. Such independent review is solely the responsibility of those accessing the City of Emerald's website.

Accept Decline

<https://pro.prismcompliance.com/>



https://pro.prismcompliance.com/



Support Legal About

Your data is secure

Login to do your compliance reporting

Need Help?

Log in here!

Enter User ID here...


Enter Password here...

Need Log In Help?

Log in

Forgot your Password? Click here and have it emailed to you.

#Stay #Informed @PRISM

 **Spring 18 Web-based Release Parties Notification (Government Customers Only)**
 Dates: User Accounts and Registration, April 9, 2018 Noon EST | Contracts, April 17, 2018 2PM EST | Payrolls, April 24, 2018 2PM EST
 PRISM Spring Release count down has started. There will be three release demonstrations and an introduction to the Spring beta. To see a video describing the release, [click here](#).



PRiSM Main Page

- PRiSM Functions
- News & Events
- Workshops

Company Search

Compliance

Administration

MWRD News & Events

MWRD Workshops

Feedback

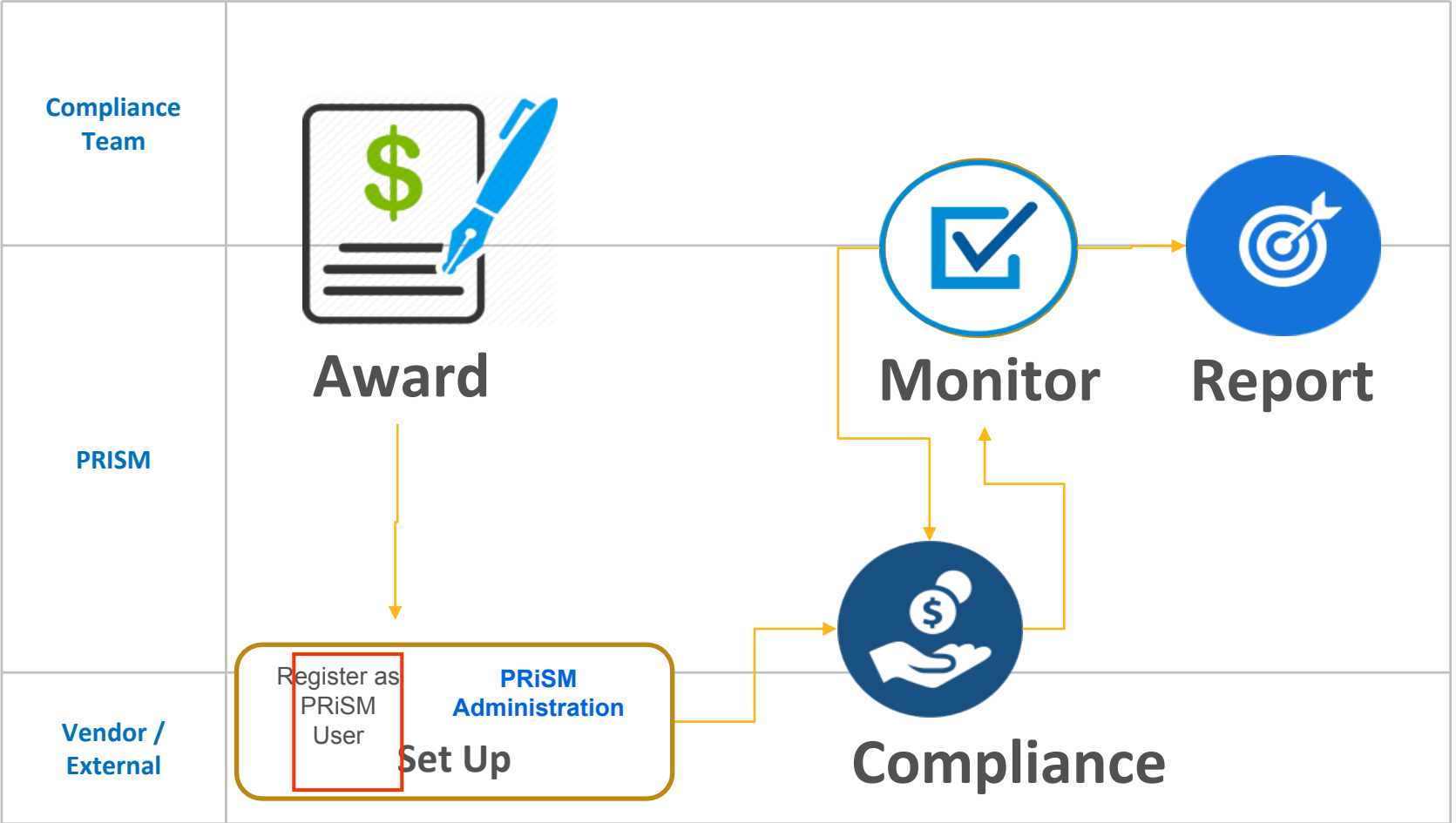
HELP

PrismCompliance.com © 2004-2019

Vendor Help Portal



Process Overview





Administration of Vendor Profile and Users

Last login time: 12/10/2019 02:06 PM ET

Welcome, Pagoda Electric! [Log-off](#)

Administration menu

| | |
|------------------------------|---|
| Manage Users Profile | <i>View/Edit/Add User Profile</i> |
| Manage Vendor Records | <i>View/Edit Information about Vendor Company</i> |

[Add up to four additional users for your company](#)

[Update Company Profile](#)

- Company Search
- Compliance
- Administration**
- MWRD News & Events
- MWRD Workshops



Manage User Profiles

- Shows users accounts
- Select Delete or Edit for existing users
- Add New User

Administration menu >> User Administration

Contractor Users

| Username | Name | Role | Unlock | Reset Password | Edit | Delete |
|-----------|----------------|------------|---------------------|----------------|-----------|--------|
| maauser2 | Donna Steveson | Contractor | Lock | Reset Password | Edit User | Delete |
| 102720140 | Moyo Fakeye | Contractor | Default Vendor User | Reset Password | Edit User | Delete |

Back to Administration Menu

Add New User

Add Contractor User

User ID *: mwr512020

Select Jurisdictions *: MWRD

First Name *:

Last Name *:

Password *:

Check Password *:

Email: *

Phone: *

Title:

Cancel Save



Manage Vendor Records

- Shows Vendor Profile Information
- Multiple Tabs of information
- If Information cannot be updated, you will need to contact your Jurisdiction to change or update.

Administration menu >> Manage Vendor Records

Profile Address Certifications Industry Advanced [Print Vendor Profile](#)

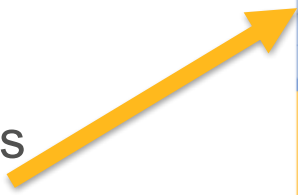
Fill out the Profile details below then press the "Update Profile" button before moving on. The fields with the "*" are required fields. Be sure to complete these fields.

| | | | |
|---------------------|---------------------|---------------------|------------|
| VIN: | 0005010763 | Date Established: | 01/01/2001 |
| Company Name *: | PAGODA ELECTRIC INC | Total Employees: | |
| Doing Business as: | | Minority Employees: | |
| Business Structure: | -- Select One -- | Website: | |
| Market Area: | -- Select One -- | Gender: | Male |
| Race/Ethnicity: | African American | Fax: | |
| Phone: | | Major Customers: | |
| Business Activity: | -- Select One -- | | |
| Product Service: | | | |
| Account Email: | moyo@emslab.com | Account Phone: | |



Company Search

- PRISM also vendors to search for other vendors in the database for networking purposes
- Only basic company information is shown no contract related data



Company Filtered Search

Filtered Search | Keyword Search

This search allows you to find companies using specific criteria. Start by typing industry code or industry description. Narrow your search by adjusting certification and other filters.

Industry:

With these Certifications:

| | |
|---|---|
| <input checked="" type="checkbox"/> 8a | <input checked="" type="checkbox"/> SBE |
| <input checked="" type="checkbox"/> DBE | <input checked="" type="checkbox"/> VBE |
| <input checked="" type="checkbox"/> MBE | <input checked="" type="checkbox"/> WBE |
| <input checked="" type="checkbox"/> MVE | <input checked="" type="checkbox"/> WVE |
| <input checked="" type="checkbox"/> MWV | |

Show Non-Certified Companies
(include non-certified in addition to companies with certifications selected above)

Company Name:
*You may enter a partial name.

Market Area:

Gender:

Race/Ethnicity:

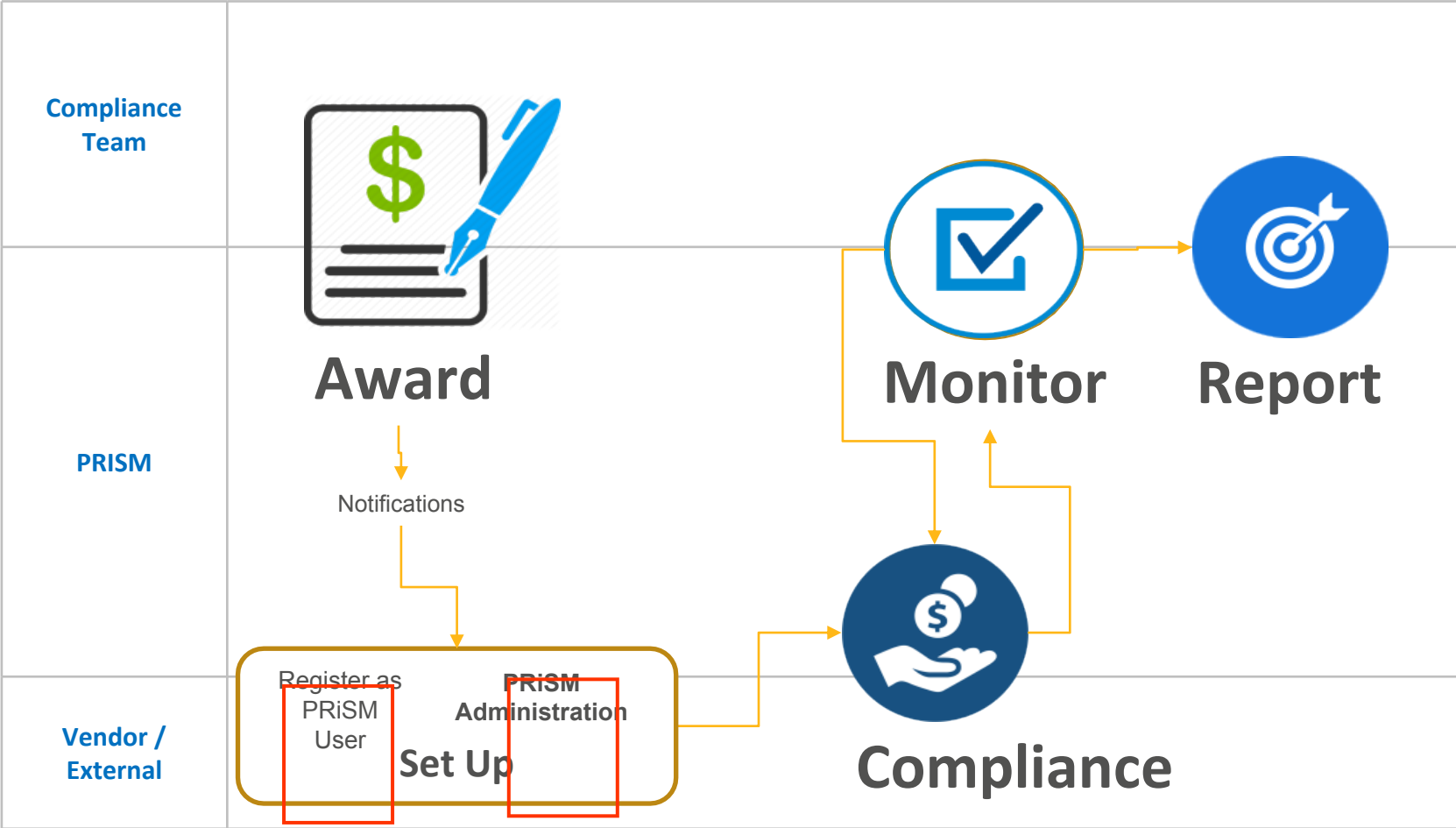
Show More Filters...

Export | Save Grid Layout | Print

| Vendor Name | Account Email | Contact | Contact Email | Contact Phone | Ethnicity | Gender | Industries | Active Certifications | Revenue |
|------------------------------------|---------------------------|--------------------------|-----------------------------|---------------|-------------------|--------|------------|-----------------------|---------|
| <u>2IM GROUP LLC</u> | | MWRD | <u>pi.spencer@mwrdd.org</u> | | Hispanic American | | Industries | MBE | |
| <u>321 CO.</u> | <u>martinez@mwrdd.org</u> | Richard L. Martinez, Jr. | <u>martinez@mwrdd.org</u> | | Caucasian | Female | Industries | WBE | |
| <u>A & D PROPERTY SERVICES</u> | | | | | | | Industries | | |



Process Overview

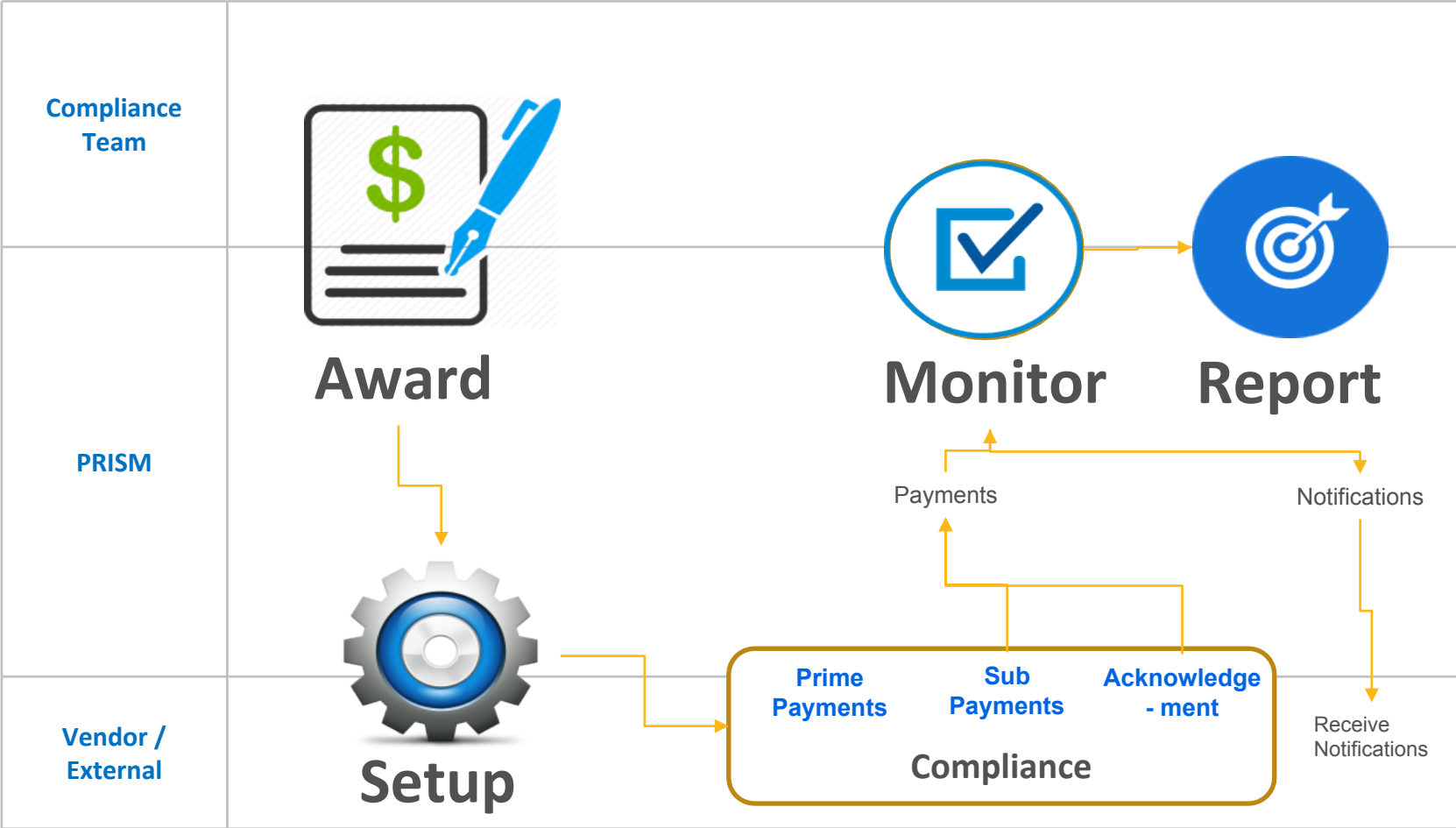




Compliance



Process Overview





Landing Page



Contract Compliance View

Welcome, Fugate Electric Co.

List of Contracts/Task Orders

Use this page to view and report contract-related spend and/or invoices (if required). Contracts shown are contracts that you are either a prime or subcontractor. If you do not see a contract that you are actively engaged, contact your jurisdiction so you may be added. This list is sort-able, group-able, and export-able. Click 'Save Grid Layout' to remember your grid layout. For more information click the help link below



- Company Search
- Compliance**
- Administration
- MWRD News & Events
- MWRD Workshops

Export Save Grid layout

Drag a column header and drop it here to group by that column

| Contract Name | Contract Number | Specialist | Position | Role | Invoices | Sub Spend | Prime Spend | Percentage Complete | Action |
|--|-----------------|---|----------|---------|--------------|--------------|-----------------|---------------------|--------|
| ELECTRICAL EQUIPMENT REPLACEMENT, EGAN WATER RECLAMATION PLAN | 0004000022 | Amin-Rasul, Eddie eddie.amin-rasul@mwr.org | Sub | MBE,SBE | \$0.00 | \$0.00 | \$2,205,942.12 | 117.34% | ☰ |
| ELECTRICAL EQUIPMENT REPLACEMENT, EGAN WATER RECLAMATION PLAN | 0004000022 | Amin-Rasul, Eddie eddie.amin-rasul@mwr.org | Sub | MBE,SBE | \$0.00 | \$0.00 | \$2,205,942.12 | 117.34% | ☰ |
| MCCOOK RESERVOIR, DES PLAINES INFLOW TUNNEL, SSA | 0004000037 | Amin-Rasul, Eddie eddie.amin-rasul@mwr.org | Sub | MBE,SBE | \$0.00 | \$0.00 | \$99,080,313.13 | 91.94% | ☰ |
| MCCOOK RESERVOIR, DES PLAINES INFLOW TUNNEL, SSA | 0004000037 | Amin-Rasul, Eddie eddie.amin-rasul@mwr.org | Sub | MBE,SBE | \$0.00 | \$0.00 | \$99,080,313.13 | 91.94% | ☰ |
| CONVERSION OF 2 NEW GCTS TO PRIMARY SLUDGE FERMENTERS AND INSTALLATION OF A GAS DETECTION SYSTEM IN THE NEW GCT BUILDING, STICKNEY WATER RECLAMATION PLANT | 0004000051 | Torres, Malisa torresm1@mwr.org | Sub | MBE-S | \$444,802.20 | \$444,802.20 | \$4,283,366.30 | 104.67% | ☰ |



Display Contracts Awarded

- Select Columns to display (Right-click on top of the grid)
- Filter by:
 - Contract Name
 - Contract Number
 - Position (Prime or Sub)
 - Role (D/W/M/BE)
 - Invoices
 - Sub Spend
 - Prime Spend
 - Participation Complete

Export Save Grid layout

Drag column header and drop it here to group by that column

| Contract Name | Contract | Specialist | Position | Role |
|--|------------|--|----------|-------|
| ELECTRICAL EQUIPMENT REPLACEMENT, EGAN WATER RECLAMATION PLAN | | min-Rasul, Eddie die.amin-rasul@mwr.org | Sub | MBE,S |
| ELECTRICAL EQUIPMENT REPLACEMENT, EGAN WATER RECLAMATION PLAN | | min-Rasul, Eddie die.amin-rasul@mwr.org | Sub | MBE,S |
| MCCOOK RESERVOIR, DES PLAINES INFLOW TUNNEL, SSA | | | | BE,S |
| MCCOOK RESERVOIR, DES PLAINES INFLOW TUNNEL, SSA | 0004000037 | | | BE,S |
| CONVERSION OF 2 NEW GCTS TO PRIMARY SLUDGE FERMENTERS AND INSTALLATION OF A GAS DETECTION SYSTEM IN THE NEW GCT BUILDING, STICKNEY WATER RECLAMATION PLANT | 0004000051 | | | BE-S |
| SWITCHGEAR AND MOTOR CONTROL CENTER REPLACEMENT, O'BRIEN WATER RECLAMATION PLANT | 0004000064 | | | BE-S |
| FURNISH, DELIVER AND INSTALL FIRE DETECTION SYSTEMS AT VARIOUS LOCATIONS | 0005001669 | | | BE-S |

Sort Ascending
Sort Descending
Clear Sorting
Group By
Ungroup
Columns

- Contract Name
- Contract Number
- Specialist
- Master Agreement Name
- Master Agreement Number
- Position
- Role
- Invoices
- Industry
- Buyer
- Department
- Sub Spend
- Prime Spend

Page size: 20

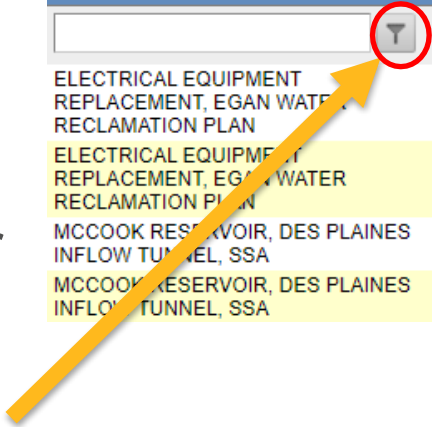


Filtering

- Lists all Contracts that you (Vendor) are participating on
- Search/Filter all Contracts that you are participating on

Drag a column header and drop it here to group by that column

| Contract Name | Contract Number | Specialist | Position |
|---|-----------------|---|----------|
| ELECTRICAL EQUIPMENT REPLACEMENT, EGAN WATER RECLAMATION PLAN | 0004000022 | Amin-Rasul, Eddie eddie.amin-rasul@mwr.org | Sub |
| ELECTRICAL EQUIPMENT REPLACEMENT, EGAN WATER RECLAMATION PLAN | 0004000022 | Amin-Rasul, Eddie eddie.amin-rasul@mwr.org | Sub |
| MCCOOK RESERVOIR, DES PLAINES INFLOW TUNNEL, SSA | 0004000037 | Amin-Rasul, Eddie eddie.amin-rasul@mwr.org | Sub |
| MCCOOK RESERVOIR, DES PLAINES INFLOW TUNNEL, SSA | 0004000037 | Amin-Rasul, Eddie eddie.amin-rasul@mwr.org | Sub |



Filter dropdown menu:

- NoFilter
- Contains
- DoesNotContain
- StartsWith
- EndsWith
- EqualTo
- NotEqualTo
- GreaterThan
- LessThan



Export Contracts Awarded to You

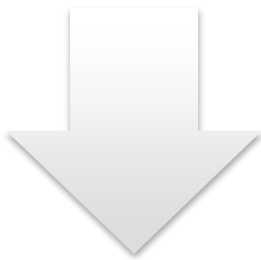
- Select Export icon



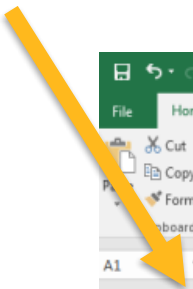
Export Save Grid layout

Drag a column header and drop it here to group by that column

| Contract Name | Contract Number | Specialist | Posi |
|---|-----------------|---|------|
| ELECTRICAL EQUIPMENT REPLACEMENT, EGAN WATER RECLAMATION PLAN | 0004000022 | Amin-Rasul, Eddie eddie.amin-rasul@mwr.org | Sub |
| ELECTRICAL EQUIPMENT REPLACEMENT, EGAN WATER | 0004000022 | Amin-Rasul, Eddie eddie.amin-rasul@mwr.org | Sub |



- Exports all contracts awarded to you to Microsoft Excel



ContractList-1 [Read-Only] [Compatibility Mode] - Excel

| Contract Name | Contract Numbr | Specialist | Master Agreem | Master Agreem | Position | Role | Invoices | Sub Spend | Prime Spend | Percentage Complete |
|-------------------|-------------------|-----------------|---------------|---------------|----------|------|-------------|--------------|--------------|---------------------|
| Air Conditioning | 11908 | | | | Prime | MBE | \$0.00 | \$145,828.00 | \$78,128.00 | 0% |
| Defense Services | B613 | | | | Sub | DBE | \$10,000.00 | \$55,552.00 | \$0.00 | 0% |
| Baltimore City Sr | BALT200 | | | | Sub | WBE | \$0.00 | \$57,000.00 | \$200,000.00 | 8% |
| Stadium Repair | K32843283284 | | | | Prime | MBE | \$0.00 | \$32,000.00 | \$688,496.00 | 0% |
| PW3897 | Recreation Centrs | Toval, Bruce | | | Sub | MBE | \$0.00 | \$51,000.00 | \$0.00 | 0% |
| World Cup Stadiu | WC4356 | Robinson, Cecil | | | Prime | MBE | \$0.00 | \$78,756.00 | \$0.00 | 0% |
| | | | | | | | Total: | \$10,000.00 | | |



Reporting Activity to a Contract

- Select the Menu icon for the Contract that you are reporting activity on

Based on your position on the contract the options would be different



- Primes**
 - Report payments to the Subcontractors
- Subcontractors**
 - Report invoices sent to Primes

| Invoices | Sub Spend | Prime Spend | Percentage Complete | Action |
|----------------------|----------------------|----------------------|----------------------|--------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| <u>See All</u> | <u>\$145,828.00</u> | <u>\$78,128.00</u> | 0% | |
| <u>\$10,000.00</u> | <u>\$55,552.00</u> | \$0.00 | 0% | |
| <u>\$0.00</u> | <u>\$57,000.00</u> | \$200,000.00 | 8% | |
| <u>See All</u> | <u>\$32,000.00</u> | <u>\$688,496.00</u> | 0% | |
| <u>\$0.00</u> | <u>\$51,000.00</u> | \$0.00 | 0% | |
| <u>See All</u> | <u>\$78,756.00</u> | <u>\$0.00</u> | 0% | |
| Total: \$10,000.00 | | | | |



6 items in 1 pages



Sub Invoices



PRiSM Sub Invoices


- PRiSM Compliance allows subcontractors to put in Invoices owed to them by Primes**
- Primes are allowed to enter payments against sub invoices in Compliance Module
- Jurisdiction is able to see paid and unpaid invoices in the system to monitor compliance
- Sub Vendors are advised to not enter Estimated Amount for invoice submitted in PRiSM but Actual Amounts owed for work performed
- Subs would get an email when a prime has received payment from MWRD, email would not include amount paid to PRIME

****Prism also allows Primes to enter invoice details on behalf of the sub**




Add a Subcontractor Invoice


- Report of an Invoice to a Prime contractor
- Select Menu on contract for which your Position = Sub
- Click 'Add Invoice'

| Invoices | Sub Spend | Prime Spend | Percentage Complete | Action |
|----------------------|----------------------|----------------------|----------------------|---|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| <u>\$0.00</u> | <u>\$0.00</u> | \$2,205,942.12 | 117.34% | |
| <u>\$0.00</u> | <u>\$0.00</u> | \$2,205,942.12 | 117.34% |  |

Payments to Subs
Invoices

MA Number: 15-124-3P MA Name: CONVERSION OF 2 NEW GCTS TO F IN THE NEW GCT BUILDING, STICKI
Task Order Number: 0004000051 Task Order Name: CONVERSION OF 2 NEW GCTS TO F IN THE NEW GCT BUILDING, STICKI
Task Order Value: \$4,092,360.00 Percentage complete: 104.67 %

 Add Invoice

 Add Invoice

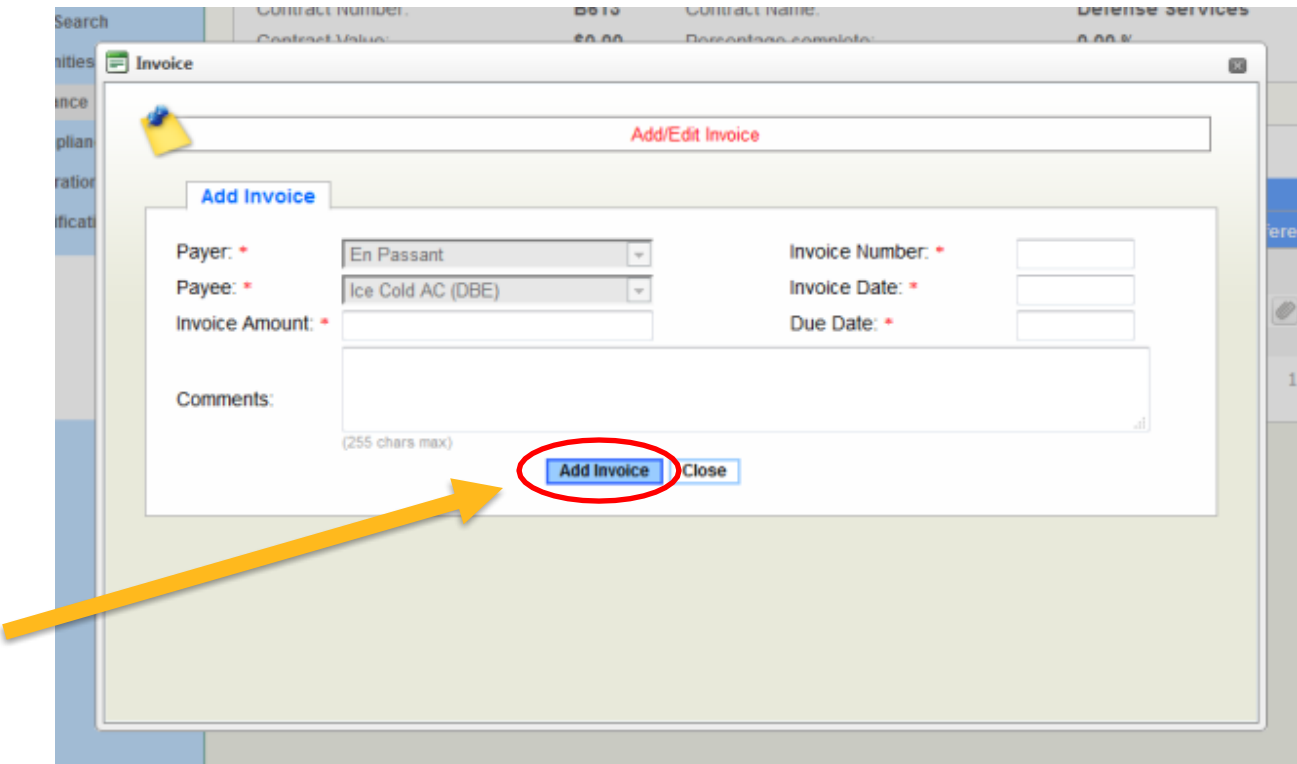
| Payer | Payee | Number | Amount | Invc |
|---|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| > INDEPENDENT MECHANICAL INDUSTRIES INC | PAGODA ELECTRIC INC | 778009 | \$426,835.90 | |
| > INDEPENDENT MECHANICAL INDUSTRIES INC | PAGODA ELECTRIC INC | 778010 | \$17,966.30 | |
| | | | Total: \$444,802.20 | |

Page size: 30



Add a Subcontractor Invoice


- Enter Details
 - Payer
 - Payee
 - Invoice Amount
 - Invoice Number
 - Invoice Date
 - Due Date
 - Comment
- Click 'Add Invoice'





Add an Invoice Document

- You can add an attachment to your invoice after you have saved invoice
- Both the Prime and Jurisdiction can see this document
- File accepted includes JPEG, PNG, PDF, Word, Excel or Text files

| Payer | Payee | Number | Amount | Invoice Date | Due Date | Reference | Amount Paid | Amount Received | Status | Action |
|-------------------|-------------------------------|--------|------------|--------------|------------|-----------|---------------|-----------------|--------|---|
| L & B Engineering | Cage Construction Company LLC | 01125 | \$1,500.00 | 11/21/2018 | 11/30/2018 | | \$0.00 | \$0.00 | All |  |
| Total: \$1,500.00 | | | | | | | Total: \$0.00 | Total: \$0.00 | | |

Add Reference

Reference Name: *

Description:

File: * No file chosen
You are currently using 0 MB (0%) of your 300 MB.
File should not be more than/exceed 300 Kbytes.

Comment:



List of Invoices

- List all Invoice Reports submitted to Primes
- Click amount under Invoices column for the Contract
- Page lists all invoices directed to Prime/Subcontractor
- You view amount paid, received and if subcontractor “accepted or rejected” payment***
- Prime is able to see all Invoices put in by all subs on the contract

| Invoices | Sub Spend | Prime Spend | Percentage Complete | Action |
|-------------------|----------------|----------------|---------------------|--------|
| \$8,500.00 | \$10,500.00 | \$60,000.00 | 12.02% | |
| \$0.00 | \$1,425,000.00 | \$8,250,000.00 | 55% | |
| Total: \$8,500.00 | | | | |

2 items in 1 pages

Export + Add Invoice

Drag a column header here to group by that column

| Payer | Payee | Invoice Number | Amount | Invoice Date | Due Date | Reference | Amount Paid | Amount Received | Status | Action |
|-------------------|-------------------------------|----------------|------------|--------------|------------|-----------|---------------|-----------------|--------|--------|
| L & B Engineering | Cage Construction Company LLC | 01125 | \$1,500.00 | 11/21/2018 | 11/30/2018 | | \$0.00 | \$0.00 | All | |
| L & B Engineering | Cage Construction Company LLC | 0187 | \$7,000.00 | 10/28/2018 | 11/28/2018 | | \$0.00 | \$0.00 | | |
| Total: \$8,500.00 | | | | | | | Total: \$0.00 | Total: \$0.00 | | |

Page size: 30

2 items in 1 pages

***Jurisdiction has this same exact view



Retention Invoices

- For Invoices that contain a retention, please enter Invoice Amount minus retention percentage
 - Example a \$100,000 Invoice with a 10% retention should be entered in PRiSM as a \$90,000 amount
- At contract end, an invoice with all retention funds owed should be entered in PRiSM to allow Prime to make payment against.



Prime Payment



Prime Payment to Subcontractor

- Prime Contractor Report of a Payment to a Subcontractor
- Select 'Payments to Subs'

| Invoices | Sub Spend | Prime Spend | Percentage Complete | Action |
|---------------|----------------|-------------|---------------------|--------|
| | \$10,500.00 | \$60,000.00 | 12.02% | |
| \$0.00 | \$1,425,000.00 | | | |
| Total: \$0.00 | | | | |

Dropdown menu options: Payments to Subs, Invoices

2 items in 1 pages





Prime Payment to Subcontractor

- Displays Prime Contractor Payments to all Subcontractors on Contract
- Select 'Add Payment' icon













 Add Payment

List of Contracts/Task Orders >> Adding Payments

Contract Number: **1908** Contract Name: **Air Conditioning Repair**
Contract Value: **\$78,128.00** Percentage complete: **0.00 %**

  Add Payment

Drag a column header and drop it here to group by that column

| Payer | Payee | Amount Paid | Payment Date | Invoice # | Invoice Amount | Ack | Reference | Action |
|-------------|------------------------|---------------------------|--------------|-------------|----------------|-----|---|---|
| | | | | | | | | |
| Ice Cold AC | AA Vendor | \$10,000.00 | 12/29/2016 | 45 | \$10,000.00 | No |  |  |
| Ice Cold AC | Accelerated Industries | \$9,500.00 | 12/07/2016 | 24 | \$10,000.00 | No |  |  |
| Ice Cold AC | AA Vendor | \$10,000.00 | 10/12/2016 | 23 | \$10,000.00 | No |  |  |
| Ice Cold AC | Accelerated Industries | \$20,000.00 | 05/30/2015 | 41 | \$20,000.00 | No |  |  |
| Ice Cold AC | AA Vendor | \$0.00 | 05/25/2017 | NAR05252017 | \$0.00 | No |  |  |
| Ice Cold AC | AA Vendor | \$0.00 | 05/25/2017 | 22 | \$0.00 | No |  |  |
| | | Total: \$49,500.00 | | | | | | |

Page size: 30 6 items in 1 pages

[<< Back to Compliance](#)



Prime Payment to Subcontractor

- Payer defaults to User
- Enter Details
 - Payer
 - Sub
 - Invoice number (or select from drop down list)
 - Invoice Amount
 - Amount Paid
 - Date Sent
- Click 'Add Payment'
- If No Reporting Activity, make appropriate selection

http://www.prismcompliance.com List of Contracts/Task Orders >> Adding Payments

| | | | |
|------------------|-------------|----------------------|-------------------------|
| Contract Number: | 1908 | Contract Name: | Air Conditioning Repair |
| Contract Value: | \$78,128.00 | Percentage complete: | 0.00 % |

Sub Payments

Add/Update

Payment Info **Custom Fields**

Payer *: Ice Cold AC Sub *: -- Select One --

Invoice Number *:

Invoice Amount *: Amount Paid *:

Reference #: NEWT6909 Date Sent *: 05/31/2017

Comments:

Add Payment **Close**

No reporting activity This sub All my subs



Acknowledgements



Acknowledgements (Sample Email)

- Once a payment has been entered by a prime to a sub
- PRISM emails subs with to validate payment
- Subs can validate directly from email or log into to PRISM to validate

[Jurisdiction] - Payment Acknowledgement [1cmO]

M Maryland_Aviation_Administration@PrismCompliance.com
Today, 11:10 AM
Mojo Fakeye

**Prism Compliance
Payment Acknowledgement**

| | |
|------------------|-------------------------|
| Prime Name: | L & B Engineering |
| Contract Number: | 12788 |
| Contract Name: | Southside Campus Design |
| Invoice Number: | inv20187 |
| Invoice Amount: | \$7,000.00 |

Dear L & B Engineering

[Jurisdiction] would like to inform you that your prime contractor has submitted its monthly utilization report indicating payments they have made to their subcontractors.

They have reported on 11/20/2018 a payment of \$7,000.00 for the contract Southside Campus Design.

Please verify the accuracy of payments to your company each month. If payment information is inaccurate, or you have further questions, you can contact your prime contractor, or you may contact the [Jurisdiction] [SupplierDiversityDept].

[Jurisdiction]

If you have received the amount of \$7,000.00 you may click here to [Acknowledge Receipt](#). (Note the payment may take a few days to reach you.)

If you have received a payment for invoice inv20187 and it is not the amount of \$7,000.00, please [log into PRISM](#) and report the amount you received.

If you have waited for the payment to invoice inv20187 and have not received any amount, then [please click here to indicate you have not received the payment](#).





Acknowledgements

- Login PRISM and click Menu of payment looking to validate

| Invoices | Sub Spend | Prime Spend | Percentage Complete | Action |
|----------------------|-----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <u>\$0.00</u> | <u>\$10,500.00</u> | \$60,000.00 | 12.02% | |
| <u>\$0.00</u> | <u>\$1,425,000.00</u> | \$8,200,000.00 | 5.58% | |
| Total: \$0.00 | | | | |

Payments to Subs

Invoices

2 items in 1 pages



List Prime Payment Reports

List all Payment Reports made by Prime

List of Contracts/Task Orders >> Payments to Subcontractor

Contract Number: **B613** Contract Name: **Defense Services**
 Contract Value: **\$0.00** Percentage complete: **0.00 %**

[Payments to Subcontractor - Ice Cold AC](#)

Export

Drag a column header and drop it here to group by that column

| Payer | Payee | Amount Paid | Payment Date | Invoice # | Invoice Amount | Ack | Reference | Action | |
|------------|-------------|---------------------------|--------------|-----------|----------------|----------------------------|-----------|--------|--|
| En Passant | Ice Cold AC | \$24,328.00 | 04/04/2017 | PO1 | \$24,328.00 | No Confirm | | | |
| En Passant | Ice Cold AC | \$14,896.00 | 03/08/2017 | PO2 | \$14,896.00 | No Confirm | | | |
| En Passant | Ice Cold AC | \$16,328.00 | 02/14/2017 | PO3 | \$16,328.00 | No Confirm | | | |
| | | Total: \$55,552.00 | | | | | | | |

Page size: 30 3 items in 1 pages

[<< Back to Compliance Management](#)



Acknowledgements

- Sub clicks 'Confirm' to acknowledge payments reported by the Prime
- Sub enters the amount received and provides any comments
- Check Acknowledge to confirm acceptance of Disclaimer
- If amount paid is correct, click 'Accept'
- If amount paid no payment received click "Decline"
- If a different amount is received put amount in Amount Received field and click "Accept"
- "Ack" would change to Yes, if accepted

| Invoice # | Invoice Amount | Ack | Reference |
|-------------|----------------|------------|-----------|
| 18 inv20187 | \$7,000.00 | No Confirm | |

If Sub disputes or declines payment, Jurisdiction would be notified

This will verify payment status. You can change the value in the "Amount Received" field if it is different from what was paid to you. Selecting Accept confirms you have obtained the Amount Received, full or partial. Selecting Decline means you did not receive a payment for this invoice. You must check the "I Acknowledge" checkbox to be able to Accept or Decline the payment. Once the payment is accepted the operation cannot be undone.

Contract Number: 12788 Contract Name: Southside Campus Design
 Contract Value: \$499,000.00 Percentage complete: 12.02 %

Contract Payment Confirmation

Prime: L & B Engineering
 Sub: Cage Construction Company LLC
 Invoice Number: inv20187
 Invoice Amount: \$7,000.00
 Amount Paid: \$7,000.00
 Amount Received: 7000

Comments:

Dear [Vendor],

By submitting this form you accept conditions determined by [Jurisdiction] payment regulations document. You assure, at risk of perjury, that this information is correct to the best of your knowledge.

I Acknowledge:

Accept Decline

| Invoice # | Invoice Amount | Ack | Reference |
|------------|----------------|-----|-----------|
| 3 inv20187 | \$7,000.00 | Yes | |



Acknowledgements (Dispute)

- If the Sub Declines payment “Ack” column would change to No
- Jurisdiction would be notified of dispute and contact vendors

| Invoice # | Invoice Amount | Ack | Reference |
|----------------------|----------------------|----------------------|-----------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| inv20187 | \$7,000.00 | Yes | |
| INV01125 | \$1,500.00 | No | |
| 7 | \$10,500.00 | Yes | |

3 items in 1 pages

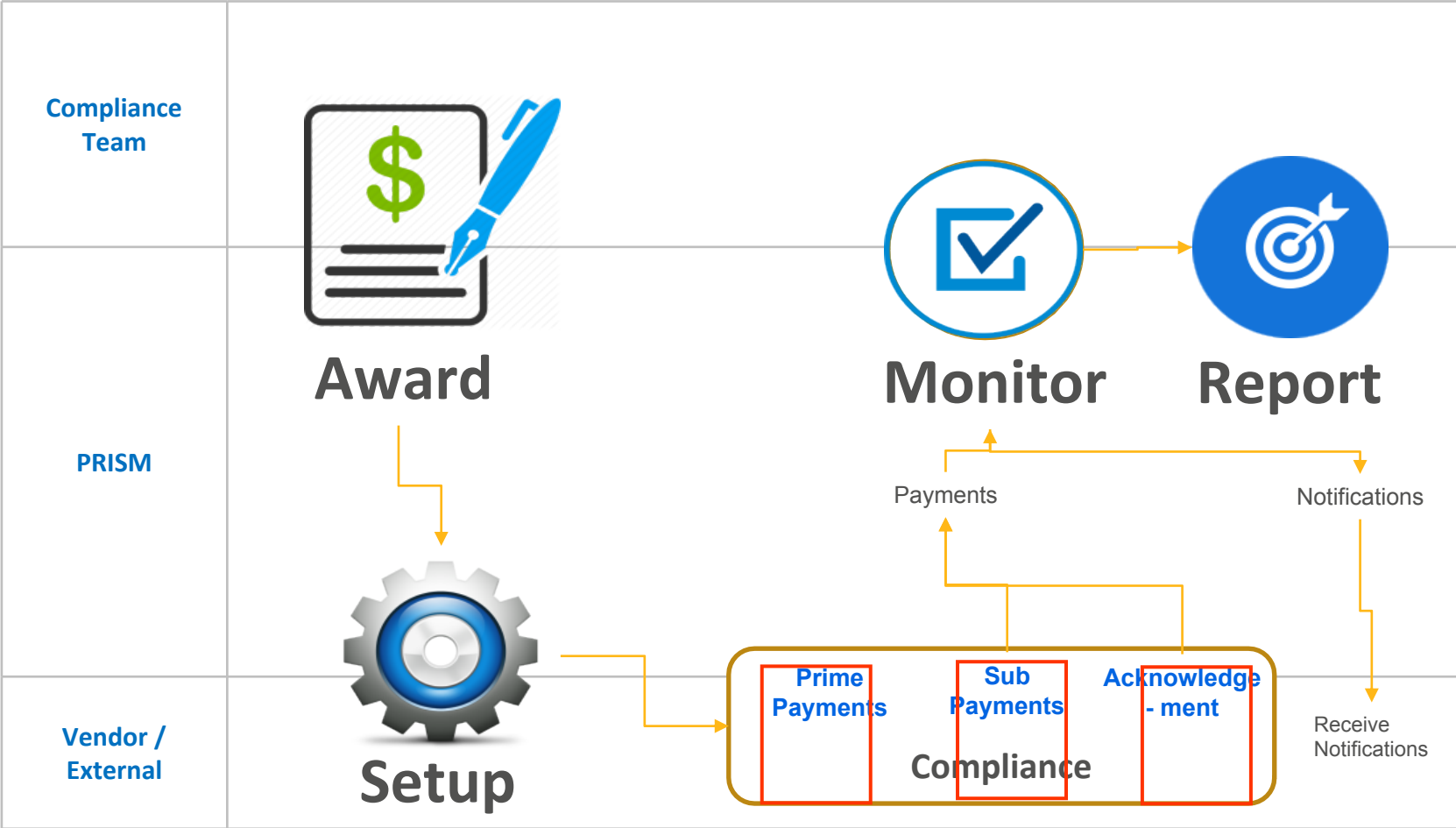


Acknowledgements Policy

- Subs are required to acknowledge, decline or dispute a sub-payment within 15 days of receiving Payment Acknowledgement email.
- Please make sure the right email is your Vendor profile
- Contractor Monitors have an internal PRiSM report to view unacknowledged sub-payments



Process Overview





Monthly Reporting



Monthly Reporting Requirements

- All Prime contracts are required to perform compliance reporting in PRiSM Monthly
- If no payment activity was performed on a contract or with a sub-vendor, Prime is still required to enter a monthly report of “No-Reporting Activity”

The screenshot displays a software interface for entering payment information. The form is titled "Payment Info" and includes a "Custom Fields" tab. The fields are as follows:

| | | | |
|------------------|-------------|---------------|---------------|
| Payer * | Ice Cold AC | Sub * | -- Select One |
| Invoice Number * | | | |
| Invoice Amount * | | Amount Paid * | |
| Reference # | NEWT6909 | Date Sent * | 05/31/2017 |
| Comments: | | | |

At the bottom of the form, there are two buttons: "Add Payment" and "Close". Below the form, there is a checkbox labeled "No reporting activity" with two sub-options: "This sub" and "All my subs". A yellow arrow points to the "No reporting activity" checkbox.



Late Monthly Reporting

- Jurisdictions will send out Notifications via PRiSM to alert vendors on late monthly reporting actions per **contract**
- Jurisdictions can send up to three alerts per month for late monthly reporting

Notification Message:

Your contract **[ContractNumber]** with **[JurisdictionName]** requires monthly reporting by day **[DayOfMonthDue]** of the month. Your report is now **[DaysPastDue]** days past due. Failure to submit compliance reports is a reason for termination of the contract.



AGENDA

Primes & Subs



I. Introduction

II. Payment Compliance with PRISM

- Sub Invoice Submission
- Prime Sub Payment
- Payment Acknowledgement/Dispute

III. Getting Help

IV. Wrap Up





How To Get Help

- **Self Help** – Use PRISM Help and Vendor Knowledge Base
- **Login Help** –Your Jurisdiction has resources to assist you with initial login information and help as needed.
- **User Help** –Your Jurisdiction has resources to provide help with user questions.
- **System Issues** - If your Jurisdiction is unable to assist, they will escalate the issue the PRISM Team for investigation and resolution.

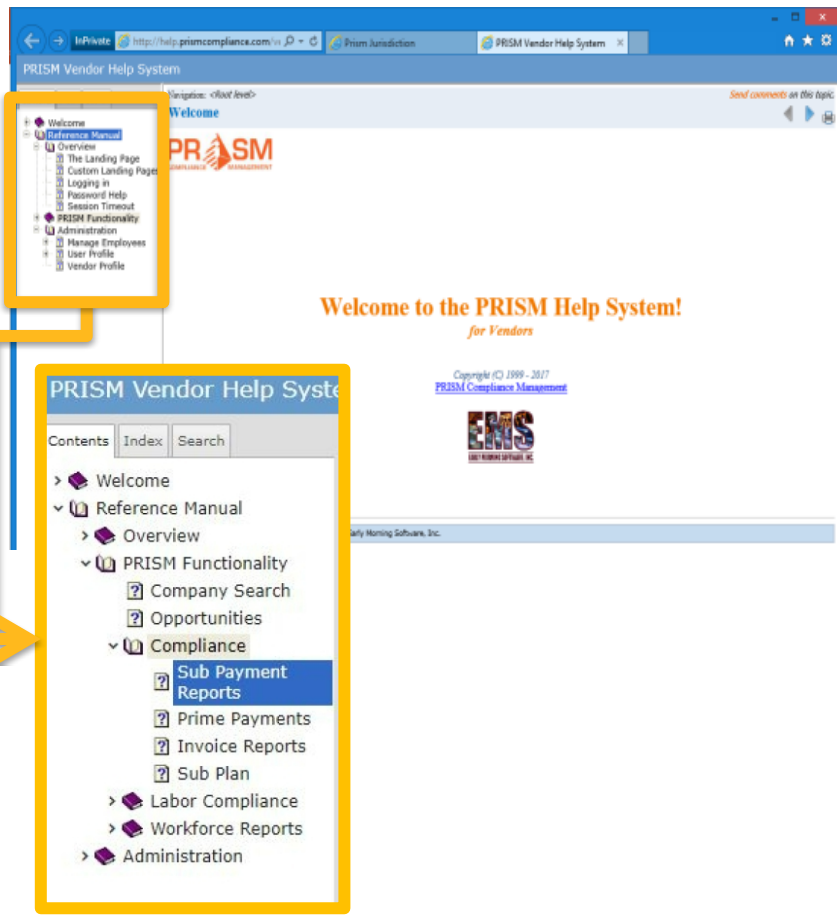
Contact
Your
Jurisdiction!



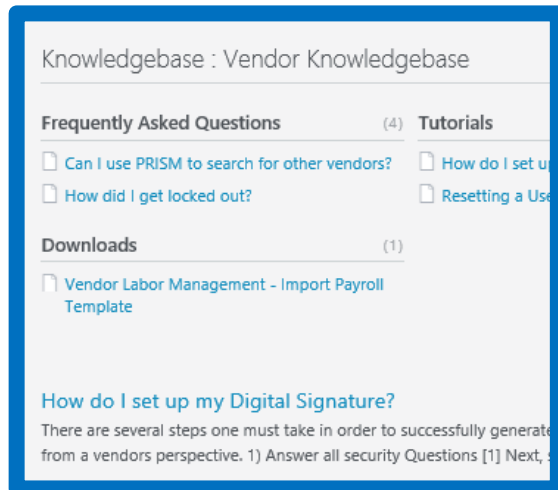
PRISM Self Help

PRISM offers complete set of self help tools.

PRISM Self Help



PRISM Knowledge Base



<http://PRISMcompliance.kayako.com>



PRISM Vendor Training

PRISM offers Quarterly Training to Vendors

PRISM we offer quarterly trainings to all PRISM Vendors

You access the trainings on the pro.priscompliance.com homepage



PRISM Training Schedule (*Jurisdiction-only*)

April - June 2020

These web-based sessions will cover a wide variety of topics in 30-60 minutes sessions and are geared towards our Jurisdictional users and PRISM administrators. Follow the link to see what we're offering: [Jurisdictional Training Courses](#)



PRISM Vendor Training Schedule

April - June 2020

[Vendor Training Courses](#)



Q&A

Please go to

<https://userregistration.prismscompliance.com/>



Achieve more...

In the areas of Vendor/Supplier Diversity and Contract Compliance Management PRISM has become an industry standard in the public and private sector. This portal will allow you to satisfy your periodic spend reporting requirements while giving you the tools to expand and grow your business. Want to achieve more, register or log into PRISM.

[Register Now](#)

About PRISM

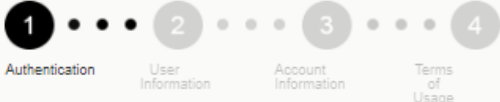
Companies need access to real-time information for sourcing, teaming, and making decisions. PRISM will provide the tools that ignites the growth of small and diverse businesses.

- REPORTING
- REPORTS
- SERVICES

PRISM provides an easy-to-use interface for periodic reporting of contract spend, payrolls, and workforce. Spend less time reporting and more time performing.

[TAKE A LOOK](#)





DISCLAIMER: You are registering to gain access to a government controlled and monitored portal. Information you provide will be evaluated for such access.

EIN *

The EIN field is required.

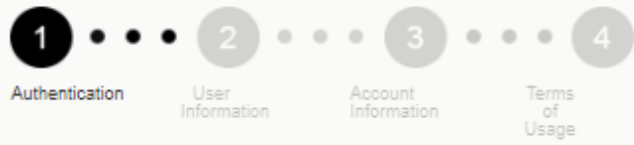
PIN *



Refresh

Input symbols

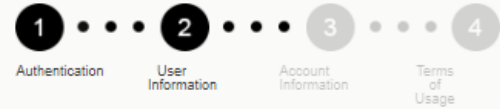




DISCLAIMER: You are registering to gain access to a government controlled and monitored portal. Information you provide will be evaluated for such access.

We found you. I am authorized to register this account for Corporate Construction Inc.. *





First Name *

Last Name *

Cell Number *

Office Number

Email *



Validation Code *





PRISM verification code [1jHu]



DoNotReply@prismcompliance.com

Tue 1/21/2020 3:38 PM

Moyo Fakeye ▾

Your email verification code is : 2140

Was this you?

Did you do this?

What is this?

🗨 Are the suggestions above helpful? Yes No



- 1 Authentication
- 2 User Information
- 3 Account Information
- 4 Terms of Usage

Choose Username *

Choose Password *

Confirm Password *

Password Hint *

Password Hint Answer *

◀ Back

Next



PRISM

COMPLIANCE MANAGEMENT



Print

Accept the terms of usage.

By accessing or using the site, information, materials and data contained in the City of Emerald's web pages, you hereby agree to accept the following terms and conditions set forth below: The City of Emerald shall not be held liable for improper or incorrect use of the information, data, materials, processes, products or apparatus, described and/or contained herein. These data, information, materials, processes, products, apparatus and related graphics are not legal documents and are not intended to be used as such. The user recognizes and acknowledges that the information contained in the City of Emerald's web pages was developed by the City of Emerald for a specific purpose or is used by the City of Emerald in a specific manner, and this information may be

I agree with the Terms of Usage.

[Privacy Policy](#)

[← Back](#)

[Register Me](#)



Now please go to

<https://pro.prismcompliance.com/>

Use previously created
Username and Password



accomplish
more

Thank You!