LBE Utilization Tracking System User Training Guide for Prime Contractors

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Purpose

The LBE Tracking System enables the Contract Monitoring Division (CMD) to ensure that City departments are in compliance with the provisions of the Local Business Enterprise (LBE) Ordinance, whose purpose is not only to assist small local businesses to compete effectively for City contracts, but also to provide for an overall fair City-wide contracting process.

System Overview & User Responsibilities

The LBE UTS allows users to do the following:

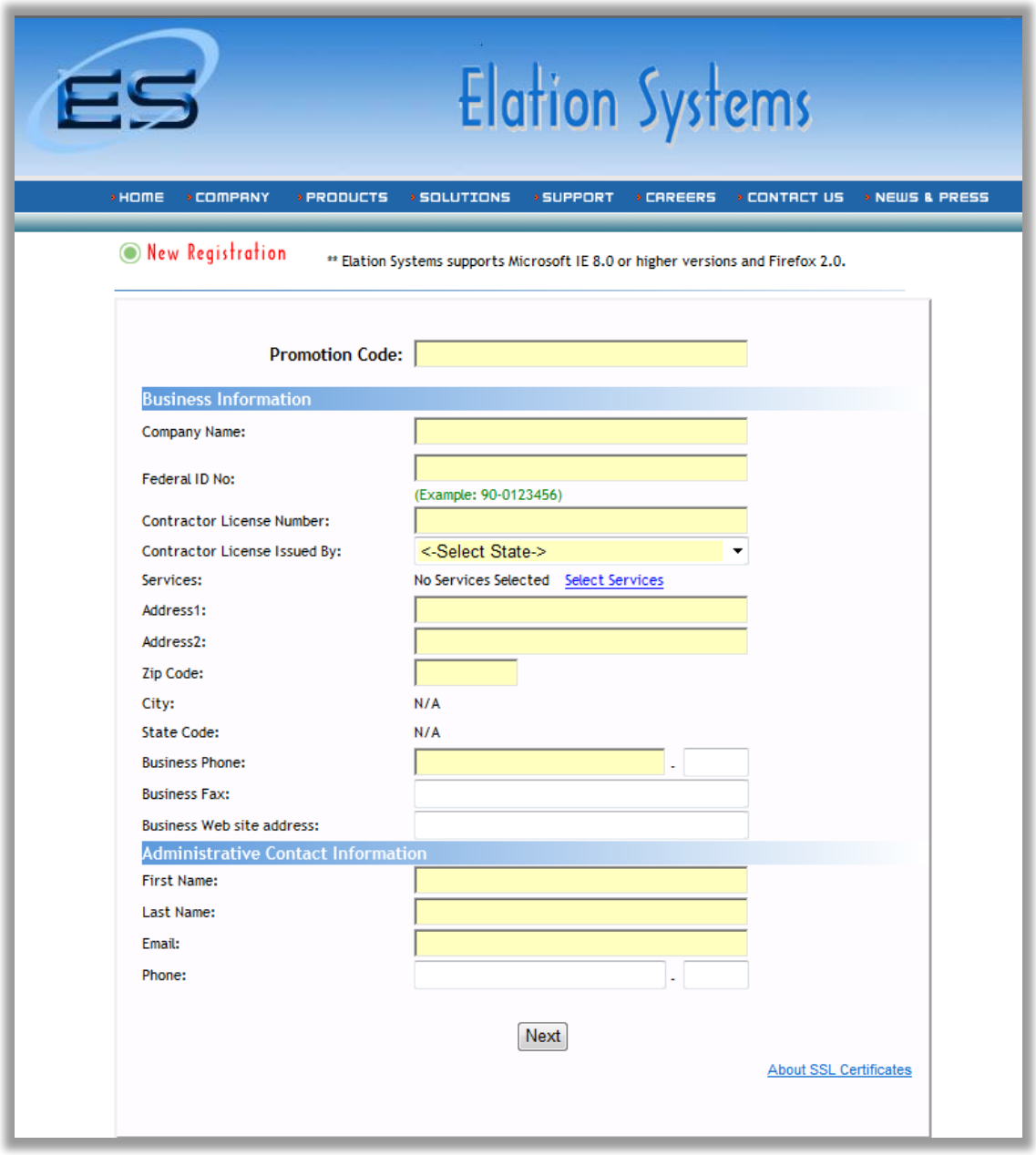
- Input descriptive information about each contract
  Responsible User: City Department
- Build a team of subcontractors associated with a particular contract
  Responsible User: Prime Contractors
- Associate payment information from FAMIS (the CCSF's accounting system) to a contract;
  Automated
- Add, edit, and accept payment information from CCSF to Prime Contractor;
  Responsible User: Prime Contractor
- Add, edit, and accept payment information for subcontractors on multiple tiers;
  Responsible User: Subcontractor
- Generate reports
  Responsible User: CMD

All of the steps mentioned about are to be reviewed and verified by CMD staff

Registering with Elation Systems

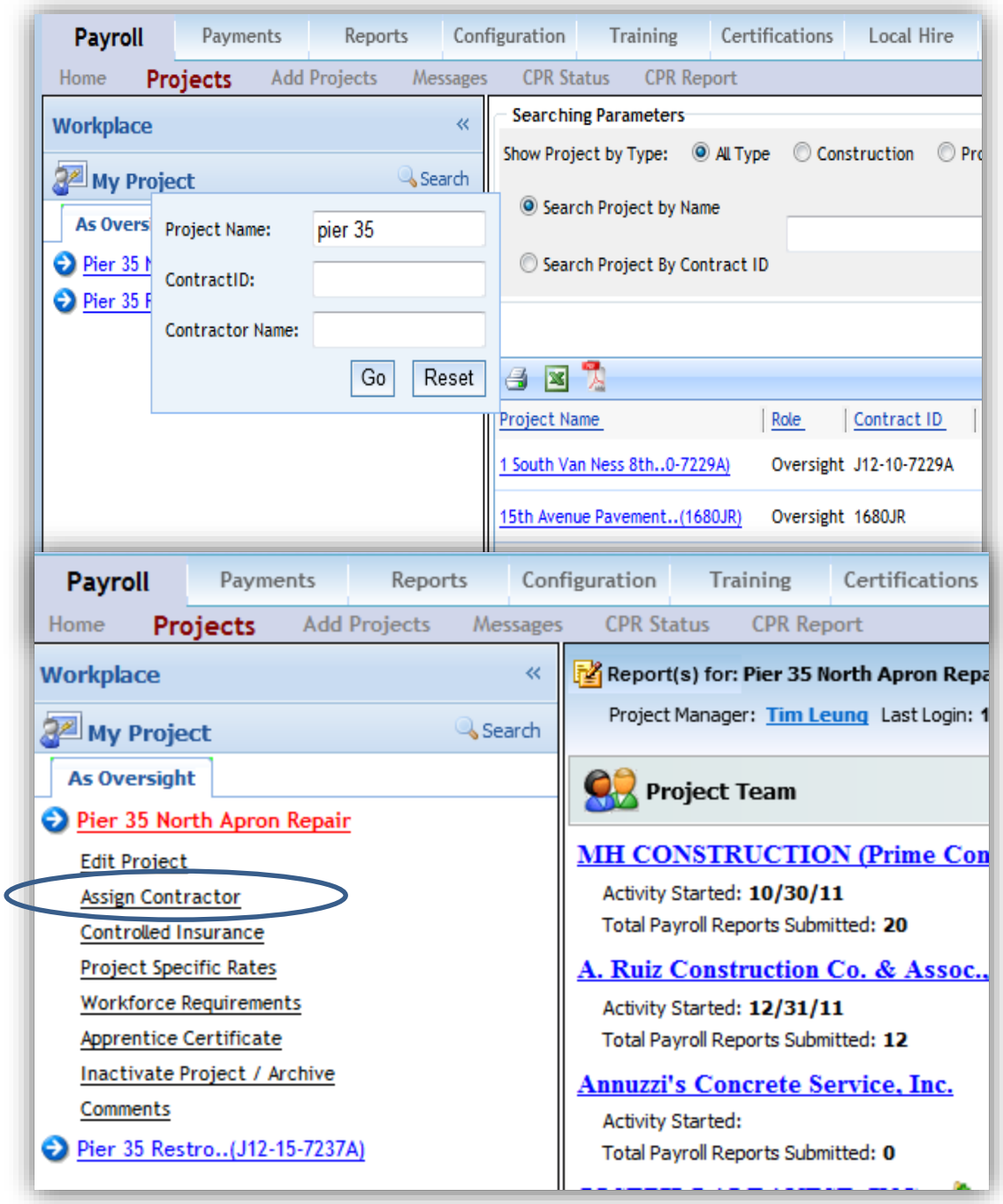
All prime contractors using the LBE Tracking System **must** have an account. To register with Elation, go to www.elationys.com and click on **"New Registration."** Enter "SFGOV-2013" in the promo code field to waive the registration fee, complete the application and click submit.

Enter Promo Code "SFGOV-2013"



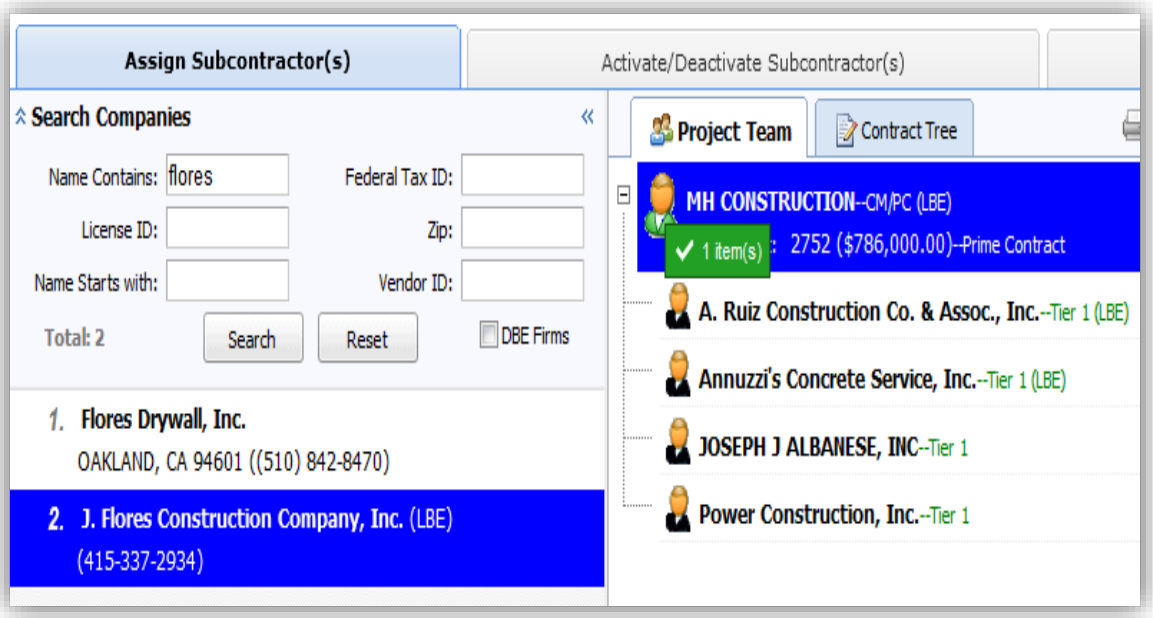
Assigning the Contractors

- New projects are added to the LBE Tracking System by City Departments
- You will receive an email notification once your company has been added to a contract as a prime contract
- When you have been added to a contract log into the LBE Tracking System at www.elationsys.com
- To find your project in the LBE Tracking System, click the search button in the Workplace sidebar. Enter the contract name or contract ID or contractor name or click “Go.”
- Next click on your contract and the **“Assign Contractor”** link under the project name.



Assigning the Contractors

- In the "**Search Companies**" function, type in the first word of the company's name. The system will list all of the companies who have registered with Elation Systems. If you don't find the name of the company you are trying to add to the project team, please contact that company and ask them to register with Elation Systems at www.elationsys.com (See previous slide entitled "Registering with Elation).
- *If the company name appears* in the left side panel, click and hold on the company name, drag it directly onto the name of prime contractor. The system will refresh and the company name will appear on the right side panel as a subcontractor in your project team.
- *To remove a contractor* from the project team, click and hold your cursor over the company's name; drag and release. The system will refresh and the company's name will automatically disappear from the right panel.



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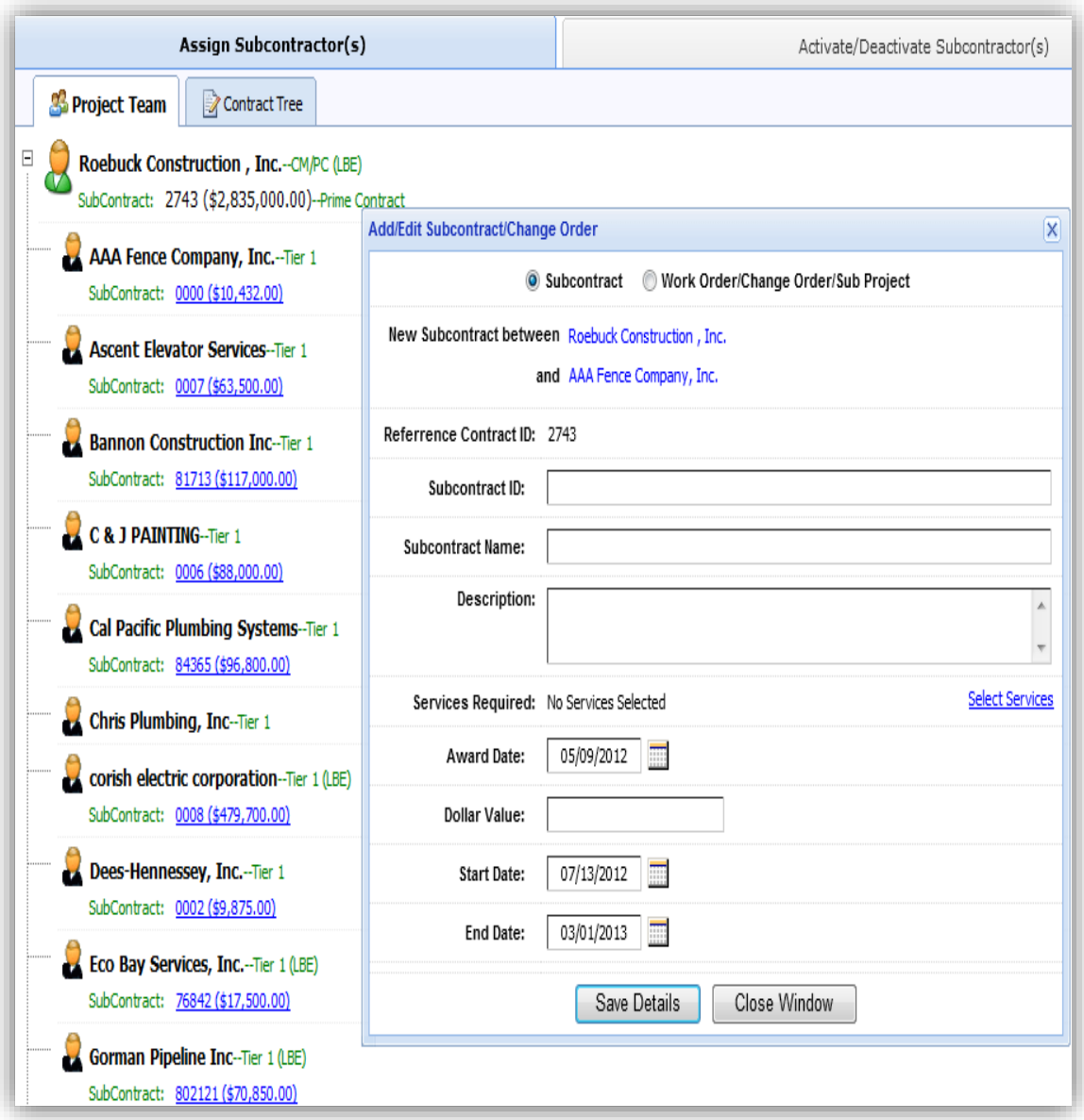
Adding Award Information

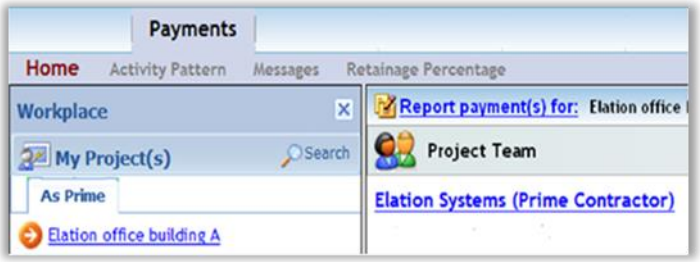
- *To add award information* to prime and subcontractors (CMD form 2A information), double click on the head icon next to the contractor's name. The **"Add/Edit Subcontract/Change Order"** pop-up window will appear. Please note that all the fields must be completed for the information to be saved.
- In the **"Subcontractor ID"** field enter a unique number for that payment. An invoice number or any unique identifier you chose will work.
- Complete the **"Subcontractor Name"** field, write a brief description of the services provided in the **"Description"** text box, then click the blue **"Select Services"** link to select an appropriate NAICS code for the service provided. Enter the appropriate dates and the dollar value at the time of award and click **"Save Details."**

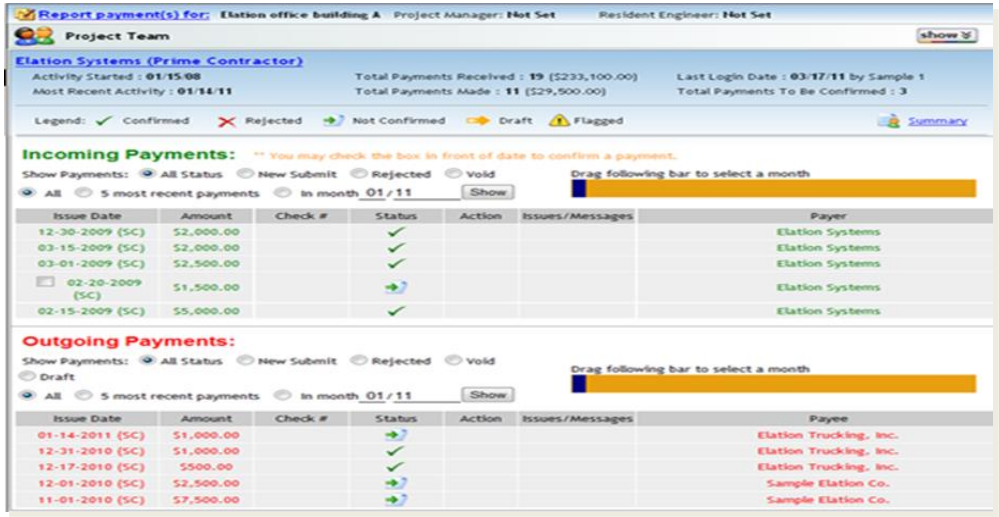


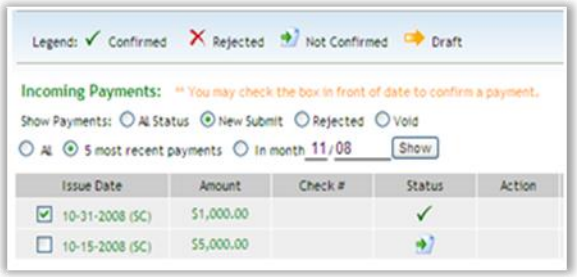
Adding Payment Information

- To accept payment information for a particular contract begin by clicking on the Project name.
- Under the Incoming Payments section, all of the payment notification will be listed for review and confirmation. Under the Outgoing Payments sections, all of the Payment Notifications sent to the subcontractors will be listed.
- To confirm a payment, click √ in the box to the left of the payment that you want to confirm.

All steps will be verified by CMD contract compliance officers

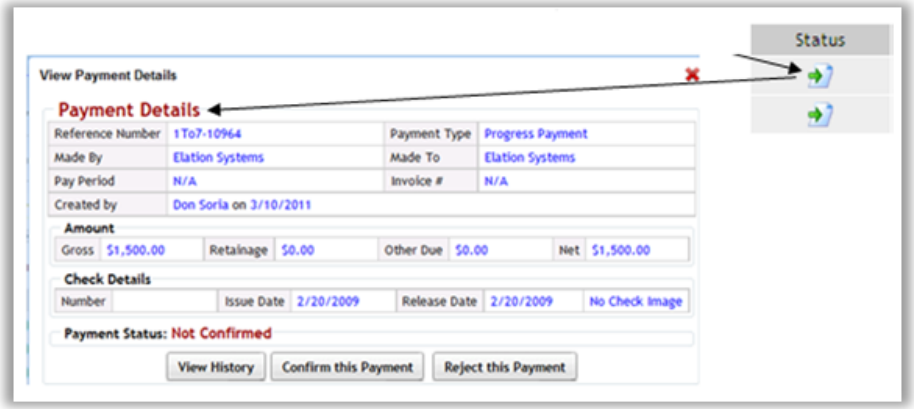


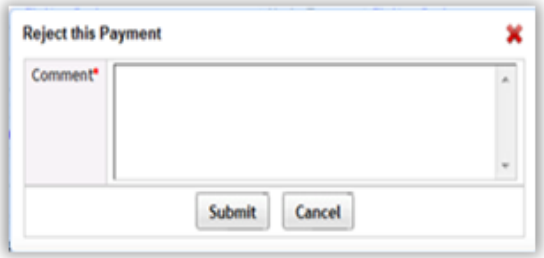




Adding Payment Information

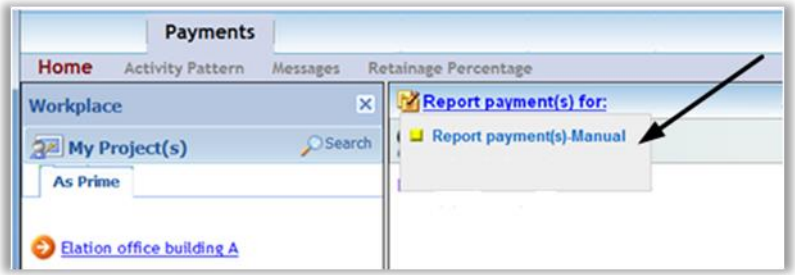
- To reject a payment, right click on the status icon and select “Reject this Payment.” Rejecting a payment will notify the prime contractor that there is an issue with the payment.
- Click on the “Reject this Payment” button to input a comment explaining why you are rejecting the payment and click submit when done.

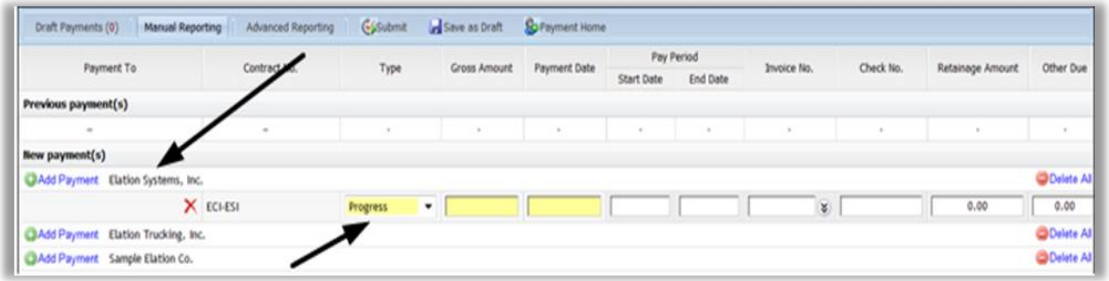


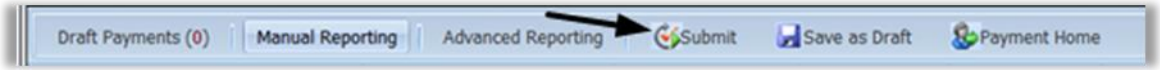


Creating and Sending Payment Information

- To enter subcontractor payment information click on the Report Payments and select Report Payment(s)-Manual
- Click on the blue “Add Payment” link in front of the Contractor name that you want to send a Payment notification. This will open an input line under the contractor’s name.
- The three yellow boxes are mandatory fields. The additional fields are optional, but contain very useful information displayed in the Payment Detail window.
- Click submit to send the Payment Notification to the Contractor
- Click on the “Save as Draft” link to save your payment information or click on the red X to delete a draft payment.

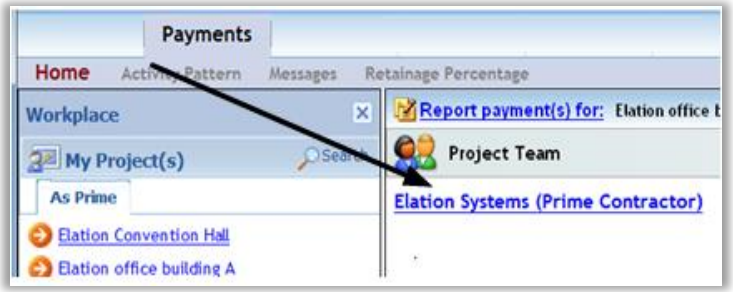


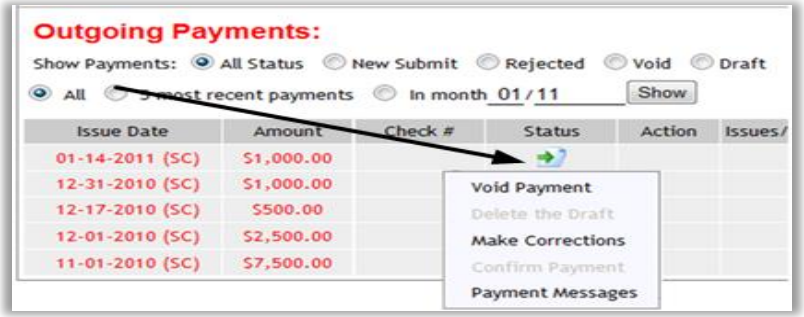


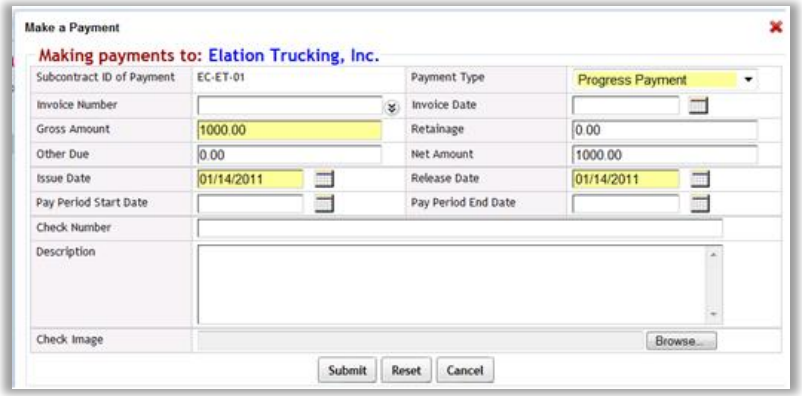


Void or Correcting a Payment Notification

- Click on the **“Payments”** tab and select the project of interest on the left side panel. Click on the relevant contractor’s name.
- In the **“Outgoing Payment”** section, right click on the icon in the **“Status”** column.
- To void a payment, select **“Void Payment.”** The subcontractor must accept the void payment request to completely void the transaction.
- To edit a payment, right click on the icon in the **“Status”** column and select **“Make Correction”**, and edit the yellow fields as needed. Click submit when done.







Resources

- The Contract Monitoring offers free monthly training for City contractors every 4th Tuesday of the month in room 421 of City Hall beginning at 10:30 AM.
- Training Manuals and additional information are posted on the CMD website here: www.sfgov.org/cmd
- Elation staff & CMD Contact Information
  - Elation contact info: 925-924-0340 or support@elationsystems.com
  - CMD contact info: 415-581-2310