Table of Contents - On-Board Packet

Section I – HUB Office/ Good Faith Effort Requirements

Section II – HUB Subcontracting Plans (HSP)-Professional Services

Section III – UT System Guide for Finding HUB Vendors on the CMBL

Section IV – B2G Contractor Training
Section I

HUB Office/ Good Faith Effort Requirements

The following information is required by the HUB Department to effectively track HUB participation on this project.

1. A revised HUB plan is required after sub-consultants are under contract.
2. HUB plan must also be revised if:
   a. There are changes in contract amount for existing subconsultants, or
   b. There is/are addition(s) of sub-consultant/scope through an ASP**.
3. Notify HUB Coordinator of any changes in architect team/staff or B2G coordinator.
4. Monthly data entry of sub-consultant payments into the Contract Compliance system (B2G). (Subconsultant payments not entered in a timely manner will be subject to payment hold)***
5. Monthly update of sub-consultant contract amounts if any changes (Hint: Contract amounts on the Contract Compliance system (B2G) should always match the contract amounts on the HSP)

**For ASPs-Good Faith Effort where additional scope is required:

1. Perform CMBL search to include additional HUBs to propose on the project (See CMBL search instructions of this manual or on-line at www.utsystem.edu/hub, Quick Links).
2. Use the list of Small Minority and Woman Business Trade Organizations and Development centers provided on the state comptroller’s website. See link below. https://comptroller.texas.gov/purchasing/vendor/hub/resources.php

***Per TAC 20.285, Subcontracts, Compliance report submission is a condition of payment; therefore, general contractors whose subcontractor payments are not entered into the UT System Contract Compliance database by the end of each month are subject to a payment hold.
HUB Subcontracting Plan (HSP)  
For Professional Services

Please follow the link below for the most current HSP form:  

AE/Professional Services - HSP
Centralized Master Bidders List (CMBL) & HUB Directory Search

The CMBL is a master database used by the state of Texas purchasing entities to search for vendors/contractors based on the products or services they can provide to the state of Texas.

Please follow the link below for CMBL Search Instructions:

How to Search the CMBL
Section IV

B2G Contractor Training

1. Provide list of individuals who will need access to this project. Need Name, title, phone and e-mail information. Designate one person who will receive notifications from the system.

   *NOTE: If this person changes, please notify your HUB representative so it can be changed.*

2. Dashboard
   a. Shows incomplete audits-click on red number to view the list of contracts
   b. Past due audits-click on the red number to view the list of contracts
   c. Show left tool bar- Click “Help & Support” for training classes, user manual or click “Other Help guides” for more training guides.

3. To find a contract-
   a. Go to “View and click Contracts” and scroll until you find the project name and number
   -OR-
   b. Go to “Search” and type the number in the 1st line in the search parameters
   c. Click on the contract

4. Tabs
   a. Main Page – basic information about the contract
   b. View – Summary of information that was added
   c. Subcontractors – shows the list of contractors, contract amount, HUB status, ability to add a 1st tier or 2nd tier sub to the list.
   d. Compliance Audit List- shows all payment made to the general contractor to date
   e. Compliance Audit Summary- Shows current contract value, Current Award for prime and HUB subs, progress toward HUB goal

5. To get to the payment screen – Click the “Compliance Audit List” tab, then select the month to add payments (View Audit). Then click “Report ___subcontractor payments” Then select “Submit all Incomplete Records”. Goes to a list of all subcontractors that need payments recorded for the month. Add all payments and click “Save”. Or to enter a payment to one sub, from the “Subcontractor Detail” click “Submit Response” (usually in red) and add the payment information.  

   *Note: Enter payments in the month you paid the sub.*

6. To print the sub payments entered to attach to the PAR form, go to “Compliance Audit List”, click on the month you just entered, then “View Audit”, and at the bottom of the page it says in small blue type “Print this page”.

   *Note: Please update on a subcontractor payments monthly basis as well as the contract amounts for all your subs. The audit will lock when payments are not entered before the deadline. For example, the reporting deadline for December is 01/31/2020 and the audit will lock on 03/01/2020. When the audit locks on 03/01/2020, we will request payment hold until the information is entered into the computer.*
A summary of reports due, and past due, are provided under My Contract Audits on the Dashboard of your account.
Prime Contractor Report

Real-time goal status is displayed under the Audit Summary of each report.

To report ALL subcontractor payments, click the ‘Submit All Incomplete Records’ button.
Subcontractor Details

Alternatively, payment information may be reported for a single subcontractor by clicking on the individual ‘Submit Response’ link.

Send an email directly to the contact listed by clicking on their name or email address. Messages and replies are maintained on the contract record.

Certification and for Credit (Inc in Goal & Goal Type) status are displayed along with paid to date amount & percent as compared to the contracted percent of the prime award.
1. Simply enter the total amount paid to the subcontractor during the reporting period. If the prime pays more than once during the period, enter the total of all payments.

2. A note to the sub may be entered under ‘Payment Detail’. Prime contractors should enter reference information such as invoice numbers and amounts to aid the subcontractor.

3. Optional comments visible only to UT System.
Submit Payments for All

The ‘Submit All Incomplete Records’ option displays the list of subcontractors with data entry columns for Payment Amount and other details that may be configured for the reporting agency, such as payment date.

Simply enter the Payment data, using the tab or enter keys, click Save at the bottom of the page to submit the report.

Prime contractors spend approximately 2 minutes a month reporting subcontractor payments online in B2Gnow.
Print completed subcontractor payments to PDF and attach to the State of Texas Progress Assessment Report (PAR), page 17, and include with all requests for payment.
Attach State of Texas Progress Assessment Report (PAR)

The PAR is the form prime contractors have been using to report subcontracting expenditures. This is a required report by the State of Texas and will continue to be included. Please complete the top section of the PAR, sign the bottom portion and attach the PDF subcontractor report (page 16). Submit both forms to OFPC with all requests for payment. This is a condition of payment by OFPC.
These instructions begin after the general contractor has entered the subcontractor payment into the B2G system and the subcontractor has responded regarding the payment amount entered. If the Subcontractor agrees with the payment amount entered, the audit will reflect complete on the contract audit list. If the subcontractor disagrees with the payment amount, the general contractor will notice on the dashboard in red “audit discrepancy” and a number also in red. See below.

Click on the number and it will take you to Contract Audits screen. See below.

Under status, Click on Discrepancy. The next screen will be the “Audit Notice” screen. See below.
Click on resolve discrepancy to go to the next screen. See below.

At the top of this screen it shows that there is one discrepancy reported by the subcontractor. At the bottom, find the subcontractor name and click on “Resolve Discrepancy” in the “Confirmed by Sub” column. The next screen will be the Discrepancy Resolution page. See below.
Notice at the top and bottom of the page there is a “Resolve Discrepancy” button. Also notice that in the “Original Compliance Audit Data Reported” section, it shows the amount the subcontractor is saying he was paid. Below that is a comment regarding the amount paid. Whether the general contractor agrees or disagrees, click on “Resolve Discrepancy” at the top or bottom of the page.
Complete the form:

Confirm Payment reported as correct or incorrect;
Add: Public comments-UT System and general contractor can see these comments, or:
Note: Enter comments so the subcontractor knows why you agree or disagree with this amount.
Add: Private Comments-Only UT system will be able to see these comments.
Save Response.

If the general contractor agrees with the amount reported by the subcontractor, click agree on the form. The subcontractor will be asked to confirm the new payment amount. After the subcontractor has confirmed the new payment amount, the new amount will automatically be changed on the sub payments screen.

If the general contractor disagrees with new payment amount there is still a discrepancy and a notice will go back to the subcontractor to resolve. After the general contractor response is saved, the overview screen showing the general contractors response is reflected. See below.
A Discrepancy will continue until the general contractor and the subcontractor agree on the amount paid. If the discrepancy is unable to be resolved by the general contractor and subcontractor, the UT System Contract Compliance officer will assist with resolution of the discrepancy.