



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

LCPtracker created this "Prime Approver" database feature to offer additional resources and control to Prime Contractors. Primes will now 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 Subs 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.

Aside from the benefit of instantaneous transmittal (no more snail mail!), LCPtracker offers both the Prime and Administrator top-of-the-line monitoring tools and comprehensive reports that will cut each parties work load from 50-75% as our clients have reported back to us!

To begin using this feature, **the acting Lead Administrator with Full Admin Rights will need to 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)."
- 2) This person/people with the Prime will be required to **have additional training** other than just the Contractor database because all the new tools that will be accessible to them are in a separate Prime Approver database.
- 3) Create a **Contractor account** for the Prime Contractor as well. This is where the Prime can submit payrolls for their own company.
***Note** --A Prime Contractor will have **TWO separate logins in using LCPtracker**.
- 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 to access all Projects, all the Projects in one Department, or to any number of individual projects. Whatever the choice, **do not forget to assign the Prime Approver** to something.



SCREENSHOT GUIDE TO STEP 4 CREATING THE PRIME APPROVER'S LOGIN

Projects Certifications Violations Reports Admin eDocument

Add / Edit PM Login Information **Add Mode**

Project Manager Information

To add a new PM Login, enter information and save. To edit an existing PM Login, select it from the list first then

User

Project Manager

Prime Approver

Read-Only User

Full Admin

Limited Admin

E-Mail * (Login information will be sent to this email address.)

Name *

Click on "Assign to All Projects", or enter project assignments below.

Assign to All Projects

Department Assignment

Delete

Cancel

Reset Form

To assign the Prime Approver Login rights, the Lead Administrator must fill out their name, email address and check the radio button for "Prime Approver".

This person may also be assigned different to all projects, one department OR only specific projects.

Once "Save" has been clicked, an email is auto-generated and sent to the person with a User ID and Temporary Password.

Project Assignment

To create a new assignment, select project and

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



Add / Edit PM Login Information **Edit Mode**

Project Manager Information

To add a new PM Login, enter information and save. To edit an existing PM Login, select it from the list

User
Stacey Doll Project Manager
 Prime Approver
E-Mail
sdoll@lcptracker.com Read-Only User
Name *
Stacey Doll Full Admin
User Id
sdoll@lcptracker.com Limited Admin

Assign to All Projects

Department Assignment

Note: To on Save Assigning selected

Reset PWD **Delete** Cancel Reset Form Save

You can always pull any User's name assigned to this account in the pull-down and the information will populate like this.

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



User
Stacey Doll

E-Mail
sdoll@lcptrackr.com

Name *
Stacey Doll

User Id
sdoll@lcptrackr.com

Click on "Assign to All Projects", or
 Assign to All Projects

Department Assignment
▼

Reset PWD Delete Cancel Reset Form Save

Project Assignment
To create a new assignment, select project and click on "Create Assignment". To delete an assignment, select project and click on "Delete".

114th Avenue - Streetscape Improvements ▼

Create Assignment

Project Code	Project Name
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**To Assign to All Projects, click this box and then Save.
For Department, use pull-down list to select and then click Save.**

To Assign Prime Approver to one Project at a time, go down to "Project Assignment" section, select name from pull-down menu and then click "Create Assignment".

Note: To create/change department assignment Assigning 'Default Department' gives the user

Project Manager
 Prime Approver
 Read-Only User
 Full Admin
 Limited Admin

To develop a full understanding of the entire Prime Approver Database it is important that we break down the 3 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 we will follow.

VIEW FROM A CONTRACTOR ACCOUNT

Each and every Prime and Subcontractor have 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 pull-down menu below** to choose the date range of submitted CPRs.

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



CN - LCPTRACKER CA DEMO

Projects	1. Payroll Records	2. Notices	3. Certification	Reports	eDocuments	Set Up
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Contractor's Main Screen

WELCOME MAKINO MECHANICAL

[Click here to Sign Up for Web Contractor Training \(no charge\) >>](#)


Project Assignments

3 Rejected CPRs

9 Admin Notices

Project Code	Project Name	Date Assigned	Bid Ad Date	Show Certifications	Show Admin Information
RA-2284889	Rush Medical Center - Central Hospital, Building A and B	09/28/2010	03/04/2010	SHOW CERTS	SHOW INFO
RA-2476688	Bridge Reinforcement and Resurfacing	09/28/2010	11/10/2009	SHOW CERTS	SHOW INFO
SA-629902	114th Avenue - Streetscape Improvements	09/28/2010	05/15/2009	SHOW CERTS	SHOW INFO

This column has been added to see current status of Approval from Prime Approver

Payroll Certifications

Display

Project Name	Week End Date	Performing	Accept Status	Prime Approval	Edit Certification	View CPR Report	Details
114th Avenue - Streetscape Improvements	3/12/2011	YES	UPDATED		EDIT	REPORT	Details
114th Avenue - Streetscape Improvements	3/5/2011	NO	Submitted	Approved	EDIT	REPORT	Details
114th Avenue - Streetscape Improvements	2/26/2011	NO	Submitted	Approved	EDIT	REPORT	Details
114th Avenue - Streetscape Improvements	2/19/2011	NO	Submitted		EDIT	REPORT	Details
114th Avenue - Streetscape Improvements	2/12/2011	NO	Submitted		EDIT	REPORT	Details
114th Avenue - Streetscape Improvements	2/5/2011	NO	Submitted		EDIT	REPORT	Details
114th Avenue - Streetscape Improvements	1/29/2011	NO	REJECTED		EDIT	REPORT	Details

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.

ACCEPT STATUS LISTINGS AND EXPLANATIONS

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	Administrator	This is the "Final and Foremost" status for a CPR. This means that the Lead Administrator has reviewed the CPR and has Accepted it.



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 Lead Administrator have found that payroll to be in good standing. Should we note that sometimes Admins don’t change the Accept status?

OTHER DIFFERENCES IN A CONTRACTOR ACCOUNT

- 1) The Admin Contact for a Project will most likely be someone from the Prime Contractor instead of someone at the Administrator level. 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 Subs answer those questions that LCPtracker Support Staff is legally unable to assist with. These **“handful”** of issues can be found in another Support Document.

Project Code	Project Name	Date Assigned	Bid Ad Date	Show Certifications	Show Admin Information
RA-2284889	Rush Medical Center - Central Hospital, Building A and B	09/28/2010	03/04/2010	SHOW CERTS	SHOW INFO
RA-2476688	Bridge Reinforcement and Resurfacing	09/28/2010	11/10/2009	SHOW CERTS	SHOW INFO

- 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 Apprentice Certificates, Fringe Benefit Statements, explanation of Approved Health Plan, etc. . .

- 3) A **Prime Approver may Reject a Payroll in lieu of the Administrator** if something is found to still be incorrect at that level.

Currently in LCPtracker some Admins are not allowed to have direct communication with Subcontractors. If the Lead Admin finds 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.



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 Prime Approver will review and then mark all CPR's as "Approved" so that the Administrators will be able to view them.

When the Prime has finished checking a CPR and is ready for the Admin to review the payroll, they will then select "Approved". This triggers the system to allow the Admin to view the CPR.

The Prime Approver can also Reject and Permit Edit payrolls as well. Remember the default is "Submitted".

Filters are in place to easily search

There are 37 certification records found for the above selection.

Delete	Contractor	Project	Week End	Payroll No	Performing?	Submitted	View CPR	Prime Approval	Approved	Accept Status	Accepted	Final
Delete	MAKINO MECHANICAL	114th Avenue - Streetscape Improvements	7/9/2011	52	YES	8/18/2011	View			Submitted		No
Delete	MAKINO MECHANICAL	114th Avenue - Streetscape Improvements	7/2/2011	51	YES	8/16/2011	View	Approved	8/18/2011	Submitted		No
Delete	MAKINO MECHANICAL	114th Avenue - Streetscape Improvements	6/25/2011	50	NO	8/9/2011	View			Submitted		No
Delete	MAKINO MECHANICAL	Bridge Reinforcement and Resurfacing	5/28/2011	21	YES	6/30/2011	View			Submitted		No
Delete	MAKINO MECHANICAL	Bridge Reinforcement and Resurfacing	5/21/2011	20	YES	6/27/2011	View			REJECTED Permit Edit Submitted	8/16/2011	No
Delete	MAKINO MECHANICAL	114th Avenue - Streetscape Improvements	6/18/2011	49	YES	6/23/2011	View			UPDATED		No

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.



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** tab 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 much more detail in another Support Document found in 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**.



VIEW FROM THE ADMINISTRATOR'S ACCOUNT

Certifications Tab

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Projects Certifications Violations Reports Admin eDocuments Set Up

Certifications

114th Avenue - Streetscape Improvements

-- All Contractors -- Load Data

From Date To Date Process Status

-- ALL --

These two columns have been added to the Certifications tab.

The only way that the Lead Administrator can see any CPR from any Subcontractor is if the Prime has "Approved" the CPR from their side of the account.

Once the payroll is Approved the date of approval will appear in the next column.

There are 11 certification records found for the above selection.

Delete	Contractor	Project	Week End	Payroll No	Performing?	Submitted	View CPR	Prime Approval	Approved	Process Status	Select	Accept Status	Accepted
Delete	MAKINO MECHANICAL	114th Avenue - Streetscape Improvements	7/2/2010	1	YES	10/7/2010	View	Approved	9/26/2011	Certified	<input type="checkbox"/>	REJECTED	
Delete	MAKINO MECHANICAL	114th Avenue - Streetscape Improvements	6/18/2011	49	YES	6/23/2011	View	Approved	9/14/2011	Certified	<input type="checkbox"/>	UPDATED	
Delete	MAKINO MECHANICAL	114th Avenue - Streetscape Improvements	7/2/2011	51	YES	8/16/2011	View	Approved	8/18/2011	Certified	<input type="checkbox"/>	Submitted	
Delete	MAKINO MECHANICAL	114th Avenue - Streetscape Improvements	3/19/2011	32	YES	4/15/2011	View	Approved	4/15/2011	VALIDATED	<input type="checkbox"/>	REJECTED	

Projects Certifications Violations Reports Admin eDocuments Set Up

114th Avenue

-- All Contractors --

From Date To Date Process Status

-- ALL --

Note that the "Process Status" filter is still in place. This is used primarily as "internal" communication for the Lead Admin.

It aids the Admin in marking payrolls during review before the final Acceptance is done.

The only choice for this Administrator is Accepted. To Reject or allow a Sub to Edit a locked payroll, "Permit Edit", they must send an Admin Notice to the Prime Approver and request that this be done for them.

The Admin Notice can be created in the Details link on the far right or from the Admin Tab.

There are 11 certification records found for the above selection.

Delete	Contractor	Project	Week End	Payroll No	Performing?	Submitted	View CPR	Prime Approval	Approved	Process Status	Select	Accept Status	Accepted	Final
Delete	MAKINO MECHANICAL	114th Avenue - Streetscape Improvements	7/2/2010	1	YES	10/7/2010	View	Approved	9/26/2011	Certified	<input type="checkbox"/>	ACCEPTED	9/26/2011	N
Delete	MAKINO MECHANICAL	114th Avenue - Streetscape Improvements	6/18/2011	49	YES	6/23/2011	View	Approved	9/14/2011	Certified	<input type="checkbox"/>	ACCEPTED	9/26/2011	N
Delete	MAKINO MECHANICAL	114th Avenue - Streetscape Improvements	7/2/2011	51	YES	8/16/2011	View	Approved	8/18/2011	Certified	<input type="checkbox"/>	Submitted		N
Delete	MAKINO MECHANICAL	114th Avenue - Streetscape Improvements	3/19/2011	32	YES	4/15/2011	View	Approved	4/15/2011	VALIDATED	<input type="checkbox"/>	ACCEPTED	9/26/2011	N

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 that must be done is to set up a few Templates for Admin Notices that will allow the messages to be sent, as well as, to save time in the process as typically Admin Notices are sent repeatedly about 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.



Set Up tab >> Add/Edit Notice type to create the templates for Admin Notices.

Add/Edit Projects Add/Edit eDocument List Add/Edit Departments
 Contractor Setup Post Download Files Add/Edit Work Order
 Department Settings Add/Edit Notice Type Add/Edit Zip Code List

Projects Certifications Violations Reports

Add or Edit Notice Type Add Mode

To add a new notice type, enter information and save. To edit an existing notice type, select the notice type to edit.

Select a notice type to edit ...

Notice Type
 Please Reject Payroll

Standard Text for Admin Notice
 Please reject the payroll for week-end date ____ for the Subcontractor ____ because we found that _____.
 In the Rejection Note please tell the Sub that this has been Rejected per direction of the Lead Administrator and not the Prime Approver.

Here a sample template has been created that could auto-populate when selected for an Admin Notice and then the specifics of that Notice can be added before it is sent to the Prime. You can see that this can save a lot of time.

Cancel Reset Save

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, it is now time to craft the Notice to the Prime Approver.



Projects Certifications Violations Reports Admin eDocuments

Administrator Notice

[Edit Admin Notices](#)

Contractor: MCCARTHY CONSTRUCTION

Project: 114th Avenue - Streetscape Improvements

CPR Date: []

Case Number: []

Notice Title: []

Admin Notice Type: []

Notice Date: []

Notice Message (1025 Characters Max):
Please Reject Payroll
Please Reject Payroll for Subcontractor
Please Upload Fringe Benefit Statement
Test Notice Type from Admin

Administrator Notes (1025 Characters Max): []

The Contractor that needs to be selected is that of the Prime Approver. The pull-down menu will then show all the templates that have been created to use. Select the one that should be sent and it will auto-populate in the "Notice Message" section. The message can be edited before being sent.

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 and all of these Admin Notices will also be sent and be stored here.
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 the 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 which is a great feature for auditing purposes.

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—hopefully by making your workflow more productive.