

EOC RCS USER TRANSCRIPT

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Welcome to the Equal Opportunity Compliance Resident Compliance Specialist Training Module. To begin, select the Start button or press Shift+N on your keyboard.

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LOGIN

Log in with your RACF/mainframe user ID and password. Please Note: In order for a Local agency RCS to gain access to EOC, they need to fill out **2 forms** and complete the Computer Security Awareness Course CBT as listed on the Equal Opportunity website.

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RCS HOME PAGE

- Once RCS logs into EOC, the home page is displayed with a dashboard. The dashboard has information letting RCS know number of contracts with commitments and subpayment that need to be reviewed. These have been submitted by the Prime Contractor/Consultant. **Note: the contract needs to be assigned to RCS in order for them to see it on their dashboard. As for LAP RCSs, they will see all the contract submissions that are associated / tied to their local agency.**

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RCS REVIEW COMMITMENTS: PAYMENT ADJUSTMENTS

Payment Adjustments on DBE Commitments can be created by the following scenarios:

1. If a Prime enters a Payment first without submitting a DBE Commitment for a **Particular NAICs code**.
2. If a Prime enters a Payment that is greater than the DBE Commitment already reported for a **Particular NAICs code**.
3. If the **NAICS code** that the Prime reports under DBE Commitments **does not match** the NAICS code reported under Payments. (I.e. NAICS on DBE Commitments does not match NAICs on Payment side)

Submission of Zero DBE Utilization

When the Prime Contractor submits with **Zero DBE Utilization**, please note that there will be nothing for the RCS to review. The RCS can verify by running the **Contract Profile Report** and it will read **CONTRACT SUBMITTED WITH NO DBE PARTICIPATION**. This means that the Contractor has submitted with Zero DBE Utilization.

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RCS REVIEW COMMITMENTS

Note: Contracts need to be assigned to RCS in order for RCS to review commitments.

- To review commitments, select the link with the contract that needs to be reviewed for payments or commitments. You can also select **Review Commitments** tab

Note: If you select the **Review commitments** tab, contract that needs to be reviewed will appear on the list.

- You can also enter contract id, or select the RCS review status to view the contract you would need to review commitments for. You can use the begin and end dates too.

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Please note the options that are available on the RCS Review status dropdown.

All: Lists all the Contracts that have been accepted, rejected or reviewed.

Accepted: Lists the Contracts that have been reviewed and accepted by the RCS.

Rejected: Lists Contracts that have been reviewed and rejected by the RCS.

Unreviewed: Lists Contracts that Prime contractor has submitted but have not been reviewed by RCS.

After selecting the appropriate status. For example All, select the **Get Contracts** button. A list of all the contracts assigned to RCS are displayed

Note: The summary Icon at the contract level displays contract information. Select the desired contract number. A list of sub agreements for the contract is displayed, select the desired Sub agreement you would like to review.

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After selecting the desired Sub agreement, the sub information is displayed. **Select the Accept or Reject** checkbox to accept or reject the commitment. (**Note: the *Accept All Commitments* button will check the Accept box for all commitments.**) If Commitment was rejected, put in a **reject reason** from drop down as shown below. Select the **Save** button when done. A confirmation page is displayed indicating all the DBE commitments have been reviewed and accepted by RCS

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RCS REVIEW PAYMENTS

Select the **Review Payment** tab. Enter the *contract ID* or you can select on the *RCS review status* drop down to view contracts that need to be reviewed. Select the **Get Contracts** button. A list of contracts is displayed. Select the desired contract. The sub agreement screen is displayed. Select the sub agreement by selecting it. To accept a payment, select the **Accept** button. **Note:** To reject a payment, select the **reject** button and you will need to give a reason for rejecting

Note: If you need payment to be reviewed by DCCM, select the Request DCCM Review check box and select the review reason. Select the **Save** button when done. A confirmation message is received that contract has been saved. Select **Ok**.

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PROCESS CUF ADJUSTMENTS

Select the **Process CUF adjustment** tab, a list of contract(s) is displayed. Select the contract by selecting it and a list of subagreements are displayed. Select on the desired sub agreement. The perform CUF assessment section is displayed. Select the desired checkbox **-Met CUF** or **Did not Meet CUF**.

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REPORTS

The Report Menu will display different reports (Bidder Opportunity, DBE commitments and other reports. Select the Reports tab and a list of reports are displayed.

1. **Bidder Opportunity List Report:** User can view what they have submitted for their bidders list. The report shows information such as subs listed on the bidders list and their specialty area.

To run the report, complete the following steps:

- Select Contract Category and Proposal ID
- Select Submit

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2. **Contracts Not Reported:** User can view the firm's contracts that have not been reported to the Executive board and federal highway. The Report displays information such as contract ID, prime, financial project #, Fed% , contract amounts and date information

To run the report, complete the following steps:

- Select District
- Select the Funding Type(specifies whether it a federal or state project)
- Select Submit

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3. **Contract List Report:** User can view their list of contracts that have executed or been released or granted notice to proceed or even completed.

To run the report, complete the following steps:

- Select the Contract Category
- Select Contract Status
- Select Funding Type

- Select Date to use selection
- Select Dates
- Select Submit

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3) Contract Profile Report: This report allows you to view the contract details for a specific contract. It gives detailed information such as general contract information, contract amounts, DBE commitments and DBE subpayment.

To run the report, complete the following steps:

- Enter Contract ID
- Select Submit

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4) Commitment Payment Comparison Report: User can compare Payments & DBE Commitments that have been submitted in EOC for a specific contract. It compares the two and lists the difference.

To run the report, complete the following steps:

- Enter Contract ID
- Select Submit

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4) Contract Commitment Details Report: Enables user to view the commitment details with work type & DBE % for a specific contract. This is similar to the *DBE Anticipated statement*.

To run the report, complete the following steps:

- Enter contract ID
- Select Submit

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6) Contracts with No Commitments Report: Enables user to view the contracts that do not have any DBE participation. **Note:** If user checks this box, it will exclude contracts that the prime has indicated there would be no DBE participation

- To run the report: Select Submit

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7) DBE Utilization Summary Report: Enables user to view the DBE utilization summary, it lists the contract amount, DBE credit, DBE% and completion date for the firms contracts.

To run the report, complete the following steps:

- Select Contract Category
- Fill in Report Begin Date and End Date
- Fill in Fund type
- Select Submit button

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8) DBE Utilization Detail Report: Enables user to view the DBE utilization in detail outlining the NAICs, Specialty codes, DBE credit, and DBE %.

To run the report, complete the following steps:

- Select Contract Category
- Fill in Report Begin Date and End Date
- Fill in Fund type
- Select Submit button

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9) Closed Contract Sub Payments Report: Enables user to view contracts that have been closed for a specific time period. It outlines information such as contract ID, district, execution date, contract amount and federal %, DBE credit amounts.

To run the report, complete the following steps:

- Fill in Begin and End release dates

- Select Submit button

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10) Contract Sub Payment Details Report: Enables user to view subpayment for a specific contract. User can view payments, the NAICs and Specialty area, total payment amounts, and date reported information.

To run the report, complete the following steps:

- Enter Contract ID
- Enter begin & end dates(optional)
- Select Submit

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11) Certification History Report: Enables user to view certification information for a specific firm. User can run the Certification History report for a specific sub to see the NAICS that the sub is certified in and when their certification was removed.

To run the report, complete the following steps:

- Enter Vendor ID(e.g. F000000000) or Vendor Name
- Select Submit

Note: If you have any questions regarding EOC, please contact EOO help @ EOOHelp@dot.state.fl.us

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This concludes the Equal Opportunity Compliance CBT Training Module. To continue please select the Next Module button.

Module 3: DCCM EOC USER MANUAL

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Welcome to the Equal Opportunity Compliance Training Module 3. To begin, select the Start button or press Shift+N on your keyboard.

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LOGIN

- Log in with your RACF ID user id & Mainframe password. If you need your mainframe password reset, please contact FDOT service desk @ fdot.servicedesk@dot.state.fl.us
- **Note:** If you don't have a userid and password assigned, please fill out an ARRF request through this link: <http://webapp02.dot.state.fl.us/AutomatedAccessRequest/>

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DCCM HOME PAGE

- Once DCCM logs into EOC, the home page is displayed with a dashboard. The dashboard has information such as
- DBE Commitments to be reviewed that are ready to be reported to the Executive board report.
- Payments submitted by Prime Contractor/Consultant
- Newly executed contracts that have not been reported or that have change orders
- Contracts that have closed for sub payments that are ready to be released and reported to Federal Highway.

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RCS MAINTENANCE

This section enables the DCCM to assign an RCS to a contract, reassign contracts and also maintain contract assignments. **Please Note that only federally funded projects or projects that have federal dollars can be assigned to an RCS.**

Furthermore, LAP RCSs will see all the contract submissions that are associated/ tied to their local agency. Therefore, once user is assigned a local agency in EOC by the EOC administrator, they automatically get assigned to view contracts tied to the local agency.

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Assigning an RCS to a contract:

- Hover over the RCS Maintenance Tab and select **RCS assignment** as shown seen below
- Select the **Contract Category** from the Contract Category Status drop down box. Also you can use the **Contract ID** contains box to search as well.
- Select the **search** button, a list of available contracts for the chosen category will appear
- Select the desired contract by selecting the select box and select on the plus arrow
- Select the checkbox beside the selected contract

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- In the Select RCS section under Available users, choose the RCS you want to assign to the contract by selecting the checkbox beside the name and select the "plus arrow".
- Once the RCS name has been added to the selected users select the checkbox beside the RCS

Note: To un-assign an RCS, select on the "minus arrow"

- Select the **Save RCS assignment** button.

Note: the Reset button will clear out your previous input.

- A confirmation message is received that contract assignments have been saved. Select Ok.

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Maintain Contract Assignments:

- Hover over the RCS Maintenance Tab and select **maintain contract assignment** tab
- Select the **Contract Category** from the Commitment Status drop down box. Also you can use the **Contract ID box**.
- Select the **Search** button

- Once the desired contract displays, Select the desired contract
- The assigned RCS to the contract is displayed. You can add or remove an RCS by selecting the *plus* and *negative* arrows.
- Select **Save** when done

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Reassign Contract Assignments:

- To reassign multiple contracts to another RCS, select the **Reassign** option under the RCS Maintenance tab
- The Reassign option displays with the current RCS assigned to the contract.
- Next select the contract category, if all Construction contracts/Local agency contracts should be reassigned to another RCS
- Select the RCS that you would like to reassign the contracts to by selecting the box beside the name of RCS.
- Select the **Save** button to get confirmation of your selections
- A confirmation message is received that reassignments have been saved. Select **Ok**

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SUBMIT COMMITMENTS

This section allows you to review and submit DBE commitments that will be reported on the Monthly Executive board report.

- Select the **Submit Commitments** tab
- A list of contracts with commitments is displayed. **Note:** you can sort by the title such as contract ID, applicable commitments, or prime vendor.
- Select the desired contract to review and submit the commitments for the contracts

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Note: The **summary icon** enables you to view the summary for the commitment

- Select the checkbox beside the commitment you would like to submit. (Note: if you would like to submit all commitments, select the **Mark all Un-Submitted Commitments Submitted** button.)

The comment box enables you to input any comments you may have.

- Select Save button when done to get confirmation of your selections. Select **Ok**.

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REVIEW PAYMENTS

Note: In order for the DCCM to review payments, the RCS must have checked the “Request DCCM review” checkbox in the RCS interface. Otherwise, if this checkbox is not checked by the RCS, the DCCM will not be able to review the payment for the specific contract.

- To review payments, select the Review Payments tab to review the payments submitted
- A list of contract(s) to be reviewed is displayed, Select on the desired contract
- Select the **Reviewed** checkbox by selecting on it
- Select Save button when complete
- Confirmation message is received, select Ok

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CONTRACT REVIEW

Note: That The DCCM must update the contract amounts to be included in the Executive Board and Federal Reports by marking them as Ready to Report and providing a Report Date via the Contract Review tab. This provides the same function as when they filed the copy of the ADBEPS in the shared folder before. The difference being that now we are also reporting contract dollars changes in addition to the original awarded amount. So if there was a change order that increased the contract amount by \$500,000.00, the DCCM will see another DO NOT REPORT record for that \$500,000.00. The DCCM is then responsible for determining when that amount is to be reported.

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Contract Submission:

The DCCM can either select on the link on their HOME Dashboard “xxx Contracts with Un-Submitted Reporting Periods” or they can select the Contract Review tab and select on Contract Submission.

- To review entries, select the **Contract Review** tab
- Next select Contract Submission
- The DCCM will see the search page. Note that the Report Status defaults to DO NOT REPORT, but it can be changed to see other statuses.
- If the DCCM just selects Search, they will be presented with a list of all of the contracts with outstanding dollars that are waiting for determination as to when/if to report.

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- **Note** that for the initial contract dollars, if the DCCM does not specifically change the status to Ready to Report, the FIRST time the DCCM submits a commitment to Central Office for the contract, the application will automatically set the status on the FIRST (or initial awarded amount record) to Ready to Report and it will default the Report Date to the System Date.
- For change order dollars or changes to contingency amounts, the DCCM must specifically tell the application to report those dollars. There is no automatic submission trigger for change order dollars.
- To update the reporting period records, the DCCM will select on the desired contract and any reporting period records that meet the Report Status selection criteria will show at the bottom of the screen.
- To report the contract dollars the DCCM changes the Report Status to READY TO REPORT, changes the Do Not Report Reason to Select Reason and selects the Report Date. The Report Date cannot be in the past and is required. The DCCM may enter in a comment if desired.

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- When the DCCM is finished they select Save.
- If the DCCM wants to see ALL of the reporting period records for the contract, they should change the Report Status to ALL and change the Contract Category if desired and select Search.
- Then when they select the contract from the list, they would see the entire contract amounts recorded for that contract.

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DCCM Contract Release

These are contracts that are ready to be reported to Federal Highway on the *FHWA UNIFORM REPORT OF DBE AWARDS OR COMMITMENTS AND PAYMENTS*. This is for contracts that have closed and user can no longer submit payments.

- DCCM will select on the desired contract to release
- Next, change the FHWA Reporting Status to **DCCM RELEASED-FED PYMT RPT**
- Then Select Save button. Then it will disappear from your list.

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REPORTS

This section of EOC enables users to run different reports.

Select the Reports tab and a list of reports are displayed.

1. **Bidder Opportunity List Report:** User can view what they have submitted for their bidders list. The report shows information such as subs listed on the bidders list and their specialty area.

To run the report, complete the following steps:

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To run the report, complete the following steps:

- Select District
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- Select Funding Type
- Select Date to use selection
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- Select Contract Category
- Fill in Report Begin Date and End Date
- Fill in Fund type
- Select Submit button

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8)DBE Utilization Detail Report: Enables user to view the DBE utilization in detail outlining the NAICs, Specialty codes, DBE credit, and DBE %.

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- Fill in Fund type
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To run the report, complete the following steps:

- Enter Contract ID
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11) Certification History Report: Enables user to view certification information for a specific firm.

User can run the Certification History report for a specific sub to see the NAICS that the sub is certified in and when their certification was removed.

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- Enter Vendor ID(e.g. F000000000) or Vendor Name
- Select Submit

Note: If you have any questions regarding EOC, please contact EOO help

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This concludes the Equal Opportunity Compliance Training Modules. Thank you for your time and attention.

Please select the Print Certificate button to print your certificate and turn in to your TRESS Coordinator.