



Quick Guide for Financial Partners

InclusionCLT Contract Goal Utilization Module

The following document is a Financial Partner Contract Goal Utilization module quick guide for diversity and inclusion tracking in the InclusionCLT system. This guide is essential and includes general information, tips, and links to more in-depth information hyperlinked throughout this guide. This guide will provide information relevant to YOU, the Financial Partner. Thank you for working together with the Charlotte Business Inclusion office to keep the city's contracts compliant and assuring minority, women and small business enterprises thrive!

Introduction

First, it is essential to explain why we use InclusionCLT at the City of Charlotte. The primary function of InclusionCLT is to track payments made to city certified subcontractors from prime contractors and Financial Partners. InclusionCLT streamlines and automates the city's diversity data gathering, tracking, reporting, vendor management, and administrative processes. This system enhances the city's communication with vendors, promotes transparency, and fosters accountability throughout the contract lifecycle. The City assigns a Compliance Officer to each contract to assist with any questions you may have and to help ensure accurate and timely data in the system. Compliance Officers work closely with the Charlotte Business Inclusion Office to maintain data integrity and reporting for the City. Both your Compliance Officer and the CBI Team are available to you for any questions you may have!

Why am I and/or my organization receiving InclusionCLT Audits from the City?

You are receiving InclusionCLT audit notifications from the city because your organization has signed a contract *with a MWSBE participation goal* with the City of Charlotte. Contracts with participation goals are tracked with the InclusionCLT system and require payment information from Primes and Subcontractors. The audit email is your reminder from the system to enter the amount you received for this payment cycle from the city AND the amount you have paid to subcontractors towards your Minority, Women, or Small Business Enterprise (MWSBE) participation goal.

What is a participation goal?

A participation goal is a Minority, Women, or Small Business Enterprise (MWSBE) Goal established by the Charlotte Business INclusion Office (CBI) that seeks to enhance competition and promote economic growth and development in the City of Charlotte. Using the guidelines of the [Disparity Study](#) and [CBI Policy](#), CBI sets goals and encourages Primes and Financial Partners to work with city certified MWSBE Vendors.

What is the Charlotte Business Inclusion (CBI) Program?

Charlotte Business INclusion (CBI) is a program within the City of Charlotte established as a strategy to support and encourage local business growth. Since 2013, Charlotte has adopted the program into all its practices and procedures and continues to grow MWSBE goal setting. YOU are now apart of this program! The CBI Team monitors and reports on Charlotte MWSBE spending and relies on InclusionCLT as a source of data for the city. We thank you and appreciate your participation in the InclusionCLT system.

How do I access InclusionCLT?

InclusionCLT can be accessed through this [link](#) or the CBI Website Main page [here](#).

Why does the website call the InclusionCLT system "B2GNow?"

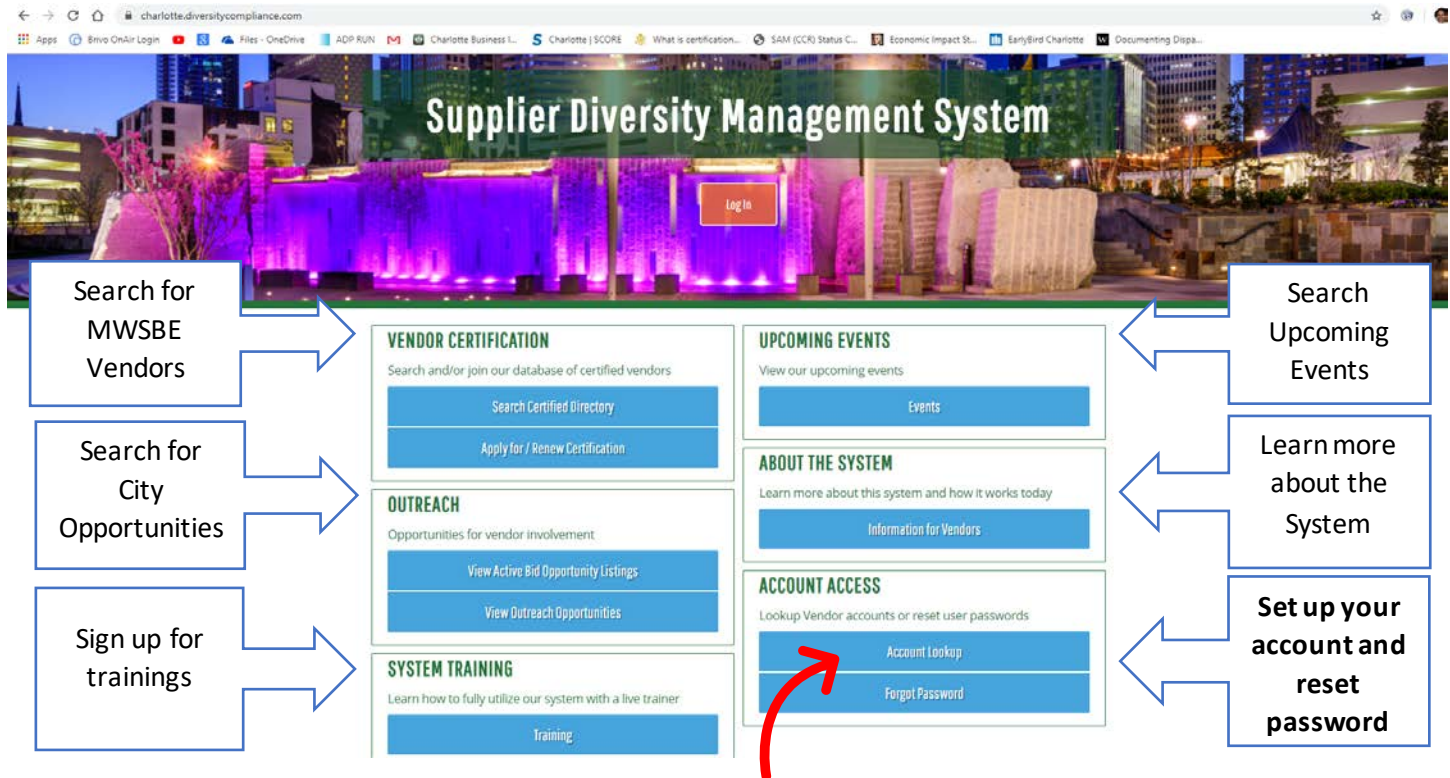
B2GNow stands for "Business to Government Now" and is the software the City of Charlotte uses to power InclusionCLT. Many cities across the United States use this software to power their data and reporting for diversity programs.

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Getting Started

First, you are going to need an InclusionCLT login. The image below is the main page of InclusionCLT and is where you will find the option to log in, search for certified vendors, sign up for trainings, and find general information about the system. Each section of the website is labeled with its main function:



You will initially have to set up your account by selecting "account lookup" in the image above and then search for your organization. The search engine will work best if you only type in the first couple of letters of your business name and click search instead of typing in the full title. Searching the full name may not produce a search result.

Search by Business Name or DBA

Tip: Try a few letters of the firm's name.

Search by Tax Identification Number

Tip: Must be 9 numbers; do not enter spaces or dashes.

Search by Contact Person

First Name

Tip: Use the first letter.

Last Name

Tip: Try the first few letters.

Search by Contact Information

Email

Tip: Try part of the email.

Phone Number

Fax Number

Search by Location

Address

Based on user's location/address

City

State/Province

You will need to verify your information and set up a log in using the account lookup feature to have access to your audits. Clicking "log in" *will not work* until you complete this initial step. Please reach out to the CBI team or InclusionCLT support if you have any issues logging in. The system may ask you information to verify your right to access your organizations audits



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before sending you a username and password. **You will receive a user name and password within 24-48 hours.**

Can multiple users in my organization have a log in?

Yes! Multiple users within your organization can have a log in. You can add users to an account once an initial account is set up. To add another user, log in to the initial account and then click Settings >> Business Settings>> User List >> Add User >> and then completely fill out the Contact Information, Address Information, and Account Preferences and Save Changes (more information on navigating the left navigation bar on InclusionCLT is included below). Do not click backspace while filling out the new user information or it will start the process from the beginning.

Finding City Certified MWSBE Vendors

At this point, your account is set up and you have added all users that will be entering data into the system! Next step is finding MWSBE Vendors in the Certified Vendor Directory. You will need to use a CBI City Certified MWSBE vendor to *receive credit towards your MWSBE goal*. A directory of all city certified MWSBE vendors can be found on the main page of InclusionCLT (see below). You will need to click “search certified directory” and then input your search criteria for the vendors you need.

Supplier Diversity Management System

Log In

VENDOR CERTIFICATION
Find and/or join our database of certified vendors

Search Certified Directory

Apply for / Renew Certification

OUTREACH
Opportunities for vendor involvement

View Active Bid Opportunity Listings

View Outreach Opportunities

SYSTEM TRAINING
Learn how to fully utilize our system with a live trainer

Training

UPCOMING EVENTS
View our upcoming events

Events

ABOUT THE SYSTEM
Learn more about this system and how it works today

Information for Vendors

ACCOUNT ACCESS
Lookup Vendor accounts or reset user passwords

Account Lookup

Forgot Password

You will be able to search vendors by certification, name, commodity codes, or by contact/owner (see below). The search engine works best when you enter the first couple of letters of the firm’s name. Searching the full name may not yield a search result even when they are available in the system. You can also search by commodity codes to find certain types of vendors



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(ex. Concrete) and select from a list of certified vendors matching your specific need.

Search by Certification Type							
Certifications	<input checked="" type="checkbox"/> Minority Business Enterprise (MBE) <input checked="" type="checkbox"/> Small Business Enterprise (SBE) <input checked="" type="checkbox"/> Women Business Enterprise (WBE) <input type="checkbox"/> Airport Concessionaire Disadvantaged Business Enterprise (ACDBE) <input type="checkbox"/> Disadvantaged Business Enterprise (DBE) <input type="checkbox"/> Historically Underutilized Business (HUB)						
Search by Business Name or DBA							
Business Name/DBA	<input type="text"/> Tip: Try just a few letters of the firm's name.						
Search by Business Description							
Business Description	<input type="text"/> Tip: Try just a few letters of a keyword.						
Search by Commodity Code							
Commodity Codes	<input type="button" value="Click to Lookup Commodity Codes"/>						
Search by Contact Person							
Contact Person/Owner	<table><tr><td>First name</td><td>Last name</td></tr><tr><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td>Tip: Use the first letter.</td><td>Tip: Try just the first few letters.</td></tr></table>	First name	Last name	<input type="text"/>	<input type="text"/>	Tip: Use the first letter.	Tip: Try just the first few letters.
First name	Last name						
<input type="text"/>	<input type="text"/>						
Tip: Use the first letter.	Tip: Try just the first few letters.						

I have identified MWSBE firms I want to use from the InclusionCLT directory, now what?

You will need to complete a [Letter of Intent](#) with the MWSBE Vendor. Letters of Intent do not have to have a goal commitment or expense commitment upfront, but they do have to list MWSBE's that you intend to use. This step acts as a *compliance plan* and protects Financial Partners from not meeting goals at the end of the quarter and are important for goal utilization throughout the life of the contract. Letters of Intent do not replace a legally binding contract with a vendor. You still need to follow regular procedure within your organization for establishing a business transaction with a subcontractor. Upload your complete Letter of Intent to your contract on InclusionCLT by clicking on the contract >> "Contract Main" Top Tab>> Attach Documents (more information on navigating the tabs of your contract is included below).

Managing Subcontractors in InclusionCLT

Once you have identified *and used the services* of a MWSBE subcontractor, you will need to add them to your contract in InclusionCLT. Below is an image of what the system looks like once you have logged in. The left side is the navigation bar for all actions you can take in the system. This bar *will never change* and is how you view information in the system, search in the system, message your compliance officer, change settings on your account, and contact support for help. The top row are the tabs for more actions inside of *your current screen* and *change* depending on what screen you are in.

First step to adding a subcontractor to your contract is finding your contract in the system. Use the left navigation bar to search for your contracts by clicking Search>> Contracts>> and then enter your search information. You can search by contract number, contract title, containing text, Contractor, Prime (you), Subcontractors, Buyer/Project Manager, contract status, commodity code, contract value, time frame, etc. The search engine will yield results with a couple of numbers or letters and may not pull results if you type the full name or number.



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Test System
B2G NOW

Search: Contracts

Users Vendors **Contracts** Bid Solicitations Outreach

Search your organization's contract database. Enter information into any of the boxes below and click **Search**. Some parameters are required.

Search First 20 Matches Search All Matches Clear Form

Search Parameters

CONTRACT/REFERENCE NUMBER **2019000999**
(Contract number, financial system reference, project number)

CONTRACT TITLE

CONTAINING TEXT

(Contract description, summary, notes, comments)

CONTRACTOR
☒ Prime ☐ Subcontractor ☐ Either

BUYER/PROJECT MANAGER
(Organization name, contact name)

Additional Search Parameters

CONTRACT STATUS **Open**

COMMODITY CODE **ADD CODES**

CONTRACT VALUE RANGE From \$ to \$ (enter values into either or both field(s))

TIME FRAME


Logged on as:
Martha Woodward
HOLDER-EDISON
FOARD-LEEPER A JV

This will search your contract and allow you to view your contract, make changes, add subcontractors, view your audits, message your contract compliance officer, make comments, etc. The image below shows what happens when you click on your contract. The left navigation bar will remain the same and show you your options for navigating around the system. The tabs at the top *have changed* to show you the options available for your current screen. Searching around the system and clicking on tabs and options is the best way to get familiar with where everything is. Do not be afraid to click around and test the search functions or see what is in each tab. Any changes or mistakes you make can easily be fixed and updated!

The third tab at the top is your “subcontractor” tab (see below) and is where you can add and edit subcontractors on your contract:

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[Help & Tools](#)

Contract Management

[Contract Main](#) | [View Contract](#) | [Subcontractors](#) | [Compliance Audit List](#) | [Compliance Audit Summary](#) | [Messages](#) | [Comments](#) | [Reports](#)

City of Charlotte

2019000999: Charlotte Convention Center Phase I Renovations_CM

Prime: HOLDER-EDISON FOARD-LEEPER A JV

Status: **Open**

3/25/2019 - 8/26/2022

Current Value: **\$98,000,000**

Contract Information

Contract Title	Charlotte Convention Center Phase I Renovations_CM
Contract Number	2019000999
System Transaction Number	04338518-0001
Start Date	3/25/2019
(Projected) End Date	8/26/2022
Contract Value	\$98,000,000.00
Compliance Officer	Maria Miles

User Assignment


Contract Type	Subcontract Percent	Compliance Contact Person	Compliance Audit Required
Prime	-	Martha Woodward	

[View Subcontractors](#) [Compliance Audit List](#)

Contract Status & Actions

Contract	Status	Actions	Previous Transactions
Contract	Open	View Contract	
ContractChange Orders			None
Contract Extensions/Shortenings			None

You will be able to edit your subcontractors by clicking on “view subcontractors” from this screen and then clicking “add first tier subcontractors” on the next page (see below):



[Help & Tools](#)

Contract Management

[Contract Main](#) | [View Contract](#) | [Subcontractors](#) | [Compliance Audit List](#) | [Compliance Audit Summary](#) | [Messages](#) | [Comments](#) | [Reports](#)

City of Charlotte

2019000999: Charlotte Convention Center Phase I Renovations_CM

Prime: HOLDER-EDISON FOARD-LEEPER A JV

Status: **Open**

3/25/2019 - 8/26/2022

Current Value: **\$98,000,000**

All subcontractors assigned to this contract are listed below.

Subcontractor List

	Subcontractor Name	Certified	Current Award	Type	Inc. in Goal	Compliance Audit	Final Pmnt	Actions
1	RJ LEEPER CONSTRUCTION LLC		\$800,000	Sub 100%	SBE/MBE		No	Add Tier 2 Sub Substitute Remove
1	TRS & I Group, Inc.		\$150,000	Sub 100%	MBE		No	Add Tier 2 Sub Substitute Remove
1	TVS NORTHCAROLINA PC [Removal request approved on 7/27/2019]	No	34.270%	Sub 100%	SBE/MBE	No	No	

[Add First Tier Subcontractor](#)

Subcontractor Addition Requests

Vendor Name	Submitted By	Certified	Requested Percent/Amount	Inc. in Goal	Compliance Audit	Date Requested	Status	Actions
RJ LEEPER CONSTRUCTION LLC	Serina Kopczynski		\$800,000	SBE/MBE		7/29/2019	Approved	View
TRS & I Group, Inc.	Serina Kopczynski		\$150,000	MBE		6/27/2019	Approved	View
RJ LEEPER CONSTRUCTION LLC	Serina Kopczynski		\$0	MBE		6/27/2019	Denied	View

NOTE:
Financial Partners are a “Prime Contractor” and your Subcontractor is a “First Tier Subcontractor.” If your Subcontractor uses a Subcontractor then their Subcontractor becomes a “Second Tier Subcontractor” and so on.




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This will bring up the option to search Vendors in the Certified Vendor database to add to your contract. (see below)

TIP:
The “Get Vendor” search will work best when you enter only the first couple of letters/numbers of the subs name/information

You must *completely* fill out the “Subcontract Information” and then save your changes to add the vendor as a subcontractor to your contract



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[Concessions](#)
[Outreach](#)
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[Message »](#)
[Settings »](#)
[Help & Support »](#)
[Logout](#)
[Show All](#) [Hide All](#)

Logged on as:
Martha Woodward
HOLDER-EDISON
FOARD-LEEPER A JV

Vendor Information

* required entry

Vendor * [Get Vendor](#) from vendor database

Vendor Compliance Contact *

None selected ▼

Vendor Address *

None selected ▼

Applicable Vendor Certifications

Assign a vendor and [click to refresh certification list](#).

Subcontract Information

Subcontractor Tier *

[Tier 1] Subcontractor to HOLDER-EDISON FOARD-LEEPER A JV [Prime Contractor]

Current Prime Contract Amount

\$98,000,000.00

Subcontract Percent/Amount *

☐ By Amount: \$

☐ By Percent: %

Enter the full amount/percent of the subcontract or the percent relative to the total contract value (\$98,000,000). Do not deduct amount/percent of subcontracts awarded by this subcontractor.

Include in Compliance Audits? *

☐ Yes - subcontractor is active and should be included in the periodic compliance audits of the contract.

☐ No - subcontractor is inactive.

Count Towards Certified Goal *

☐ Yes - Payments to this subcontractor count towards the

None selected ▼

 Goal

☐ No

Type of Participation *

☒ Subcontractor/Subconsultant

☐ Supplier - Manufacturer

☐ Supplier - Regular Dealer

☐ Supplier - Packager, Broker, Distrib., Wholesaler, Manuf. Rep.

☐ Joint Venture

☐ Fees & Commission Broker

☐ Trucking & Hauling

You have now added the subcontractor to your contract and can start entering payments.

What if I need to replace a subcontractor?

You will need to request a replacement subcontractor in the system for your contract manager to review. Replacing subcontractors will require documentation on why you are requesting a replacement that your contract manager will review and process. Valid reasons include subcontractor went out of business, unavailable for project, etc. You can replace an MWSBE subcontractor with the same type of MWSBE subcontractor if your request is approved. For example, only an MBE (Minority Business Enterprise) can replace an MBE. Please reach out to your contract manager or the CBI Team if you have any questions about this process.

Managing an Incomplete Audit

The system creates an incomplete audit when you have not confirmed or entered payments into the system. Payments that are not confirmed will lock after 60 days and will require contract manager intervention to be unlocked. Payments not confirmed within 90 days will trigger an investigation in the system for a contract compliance officer with the CBI Team to intervene and assist. Incomplete audits are sent to your email automatically from the system and will continue to alert you until you log in and enter your payment information. The emails will look like the image below and is your warning from the system to take *immediate* action:



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City of Charlotte [lblTimePeriod] Prime Contractor Contract Compliance Monitoring Report

Contract: [lblContractTitle]
Prime Contractor: [lblPrimeContractor]
Contract Number: [lblContractNumber]
Audit Time Period: [lblTimePeriod]
Contract Compliance Officer: [lblDiversityUser]

Dear [lblContactName],

The Charlotte Business INCLUSION Department monitors participation on all City of Charlotte contracts with goals. To assist our office in the monitoring process, please login to your account in the Supplier Diversity Management System and provide the requested subcontractor payment information for [lblTimePeriod].

If you have received this notice, then you are currently listed as a PRIME contractor on an active City of Charlotte contract. You are required to respond to this notice with the payment information requested.

To view the audit notice and respond, visit: [lblLink397]

To view all audit notices, visit: [lblLink753]

PLEASE REFER TO THE BOTTOM OF THIS NOTICE FOR ADDITIONAL HELP

TIP:

these links will quickly
take you to your audit

How do I enter a payment into InclusionCLT?

There are several different ways to view your incomplete audits and enter payment information. The easiest way is to click the link at the bottom of your incomplete audit email from the system. You can also search for your contract and choose the “compliance audit list” tab at the top of your contract screen to view incomplete audits for that contract (see below):

Test System

B2GNOW

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Compliance Audit Summary

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Reports

City of Charlotte

2019000999: Charlotte Convention Center Phase I Renovations_CM

Prime: HOLDER-EDISON FOARD-LEEPER A JV

Status: Open

3/25/2019 - 8/26/2022

Current Value: \$98,000,000

Refresh Page

Contract Information

Contract Title	Charlotte Convention Center Phase I Renovations_CM
Contract Number	2019000999
System Transaction Number	04338518-0001
Start Date	3/25/2019
(Projected) End Date	8/26/2022
Contract Value	\$98,000,000.00
Compliance Officer	Maria Miles

User Assignment

Contract Type	Subcontract Percent	Compliance Contact Person	Compliance Audit Required
Prime	-	Martha Woodward	✓

View Subcontractors

Compliance Audit List

Contract Status & Actions

	Status	Actions	Previous Transactions
Contract	Open	View Contract	
ContractChange Orders			None
Contract Extensions/Shortenings			None

Customer Support

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Logged on as:

Martha Woodward

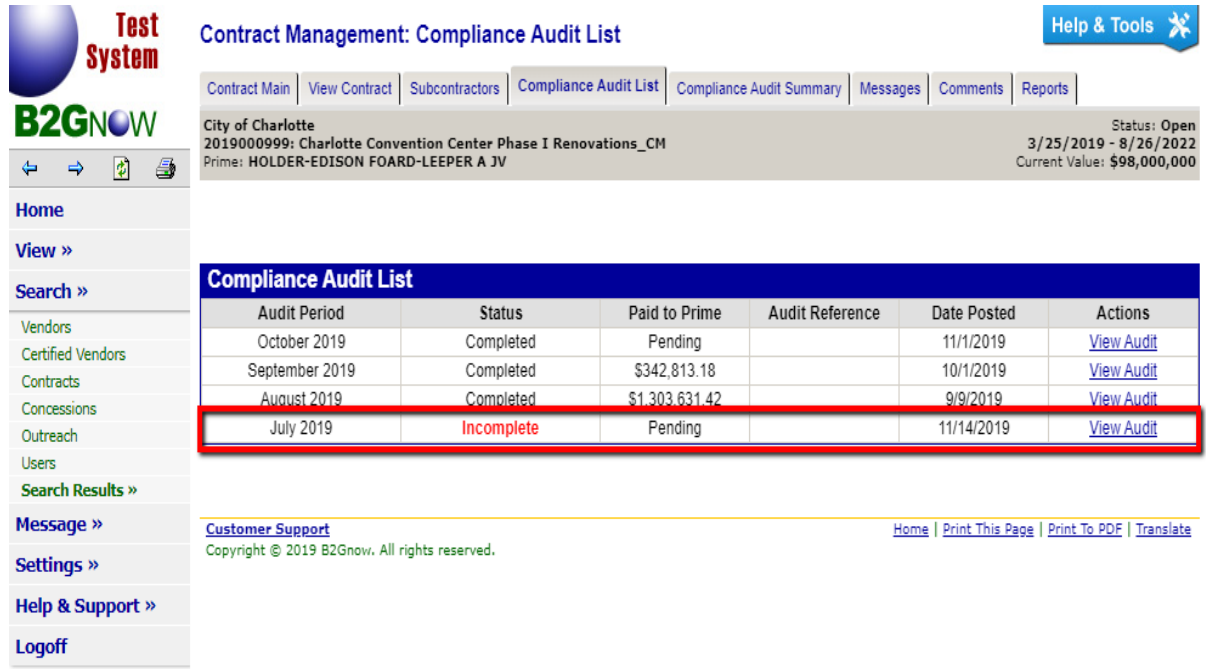
HOLDER-EDISON

FOARD-LEEPER A JV

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The “Contract Audit List” tab will open a list of all audits you have for your contract and their status. Click “view audit” on any incomplete audits to begin entering payment information.



Contract Management: Compliance Audit List

City of Charlotte
2019000999: Charlotte Convention Center Phase I Renovations_CM
Prime: HOLDER-EDISON FOARD-LEEPER A JV

Status: Open
3/25/2019 - 8/26/2022
Current Value: \$98,000,000

Audit Period	Status	Paid to Prime	Audit Reference	Date Posted	Actions
October 2019	Completed	Pending		11/1/2019	View Audit
September 2019	Completed	\$342,813.18		10/1/2019	View Audit
August 2019	Completed	\$1,303,631.42		9/9/2019	View Audit
July 2019	Incomplete	Pending		11/14/2019	View Audit

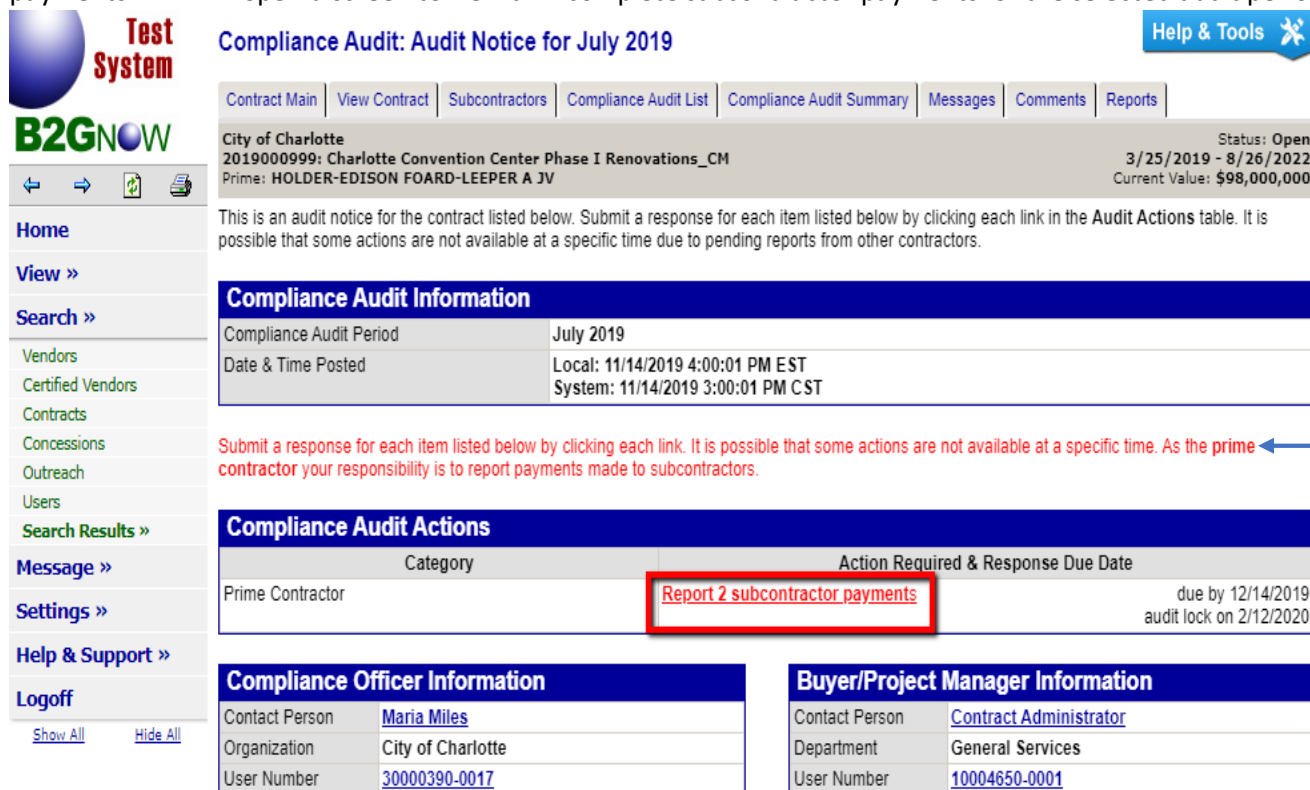
Compliance Audit List

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Click “view audit” to see what payments are missing

“Viewing the audit” will pull up a list of compliance audit actions you need to complete. The Prime Contractor in the example below has 2 subcontractor payments they need to report in order to complete their audit. The “Report 2 subcontractor payments” link will open a screen to view all incomplete subcontractor payments for the selected audit period.



Compliance Audit: Audit Notice for July 2019

City of Charlotte
2019000999: Charlotte Convention Center Phase I Renovations_CM
Prime: HOLDER-EDISON FOARD-LEEPER A JV

Status: Open
3/25/2019 - 8/26/2022
Current Value: \$98,000,000

This is an audit notice for the contract listed below. Submit a response for each item listed below by clicking each link in the **Audit Actions** table. It is possible that some actions are not available at a specific time due to pending reports from other contractors.

Compliance Audit Period	July 2019
Date & Time Posted	Local: 11/14/2019 4:00:01 PM EST System: 11/14/2019 3:00:01 PM CST

Submit a response for each item listed below by clicking each link. It is possible that some actions are not available at a specific time. As the prime contractor your responsibility is to report payments made to subcontractors.

Category	Action Required & Response Due Date
Prime Contractor	Report 2 subcontractor payments due by 12/14/2019 audit lock on 2/12/2020

Compliance Officer Information

Contact Person	Maria Miles
Organization	City of Charlotte
User Number	30000390-0017

Buyer/Project Manager Information

Contact Person	Contract Administrator
Department	General Services
User Number	10004650-0001

TIP: Instructions and important links in the system are in red

Click “submit response” on the list of subcontractors on the next page and the link will open a screen to enter your payments.

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Goal types					
For Credit to MBE Goal (1 sub)	\$0.00	0.000%	\$31,230.80	1.897%	1.897% above goal
For Credit to SBE Goal	\$6,860,000.00	7.000%	\$0.00	0.000%	7.000% below goal
For Credit to SBE/MBE Goal (1 sub)	\$6,860,000.00	7.000%	\$64,530.00	3.919%	3.081% below goal

Contract Progress

For Credit Progress

Award values may not match due to differences between overall contract goal and subcontractor assignments.

Mark 2 Remaining Subcontractors as Zero

Mark Audit as Final

Submit ALL Incomplete Records

Report Error

TIP:
You can also view
your contract
MWSBE goal
progress on this
page!

Subcontractor Payments for July 2019


	Subcontractor	Certified	Type	Inc. in Goal	Actions	Paid Amount in July 2019	Confirmed by Sub	Total To July 2019	Contract Goal	Actual Percent
1	RJ LEPPER CONSTRUCTION LLC Ron J. Leeper ronl@rjlepperco.com P 704-334-3223, F 704-348-1898		Sub 100%	SBE/MBE	Submit Response	Not Reported	--	\$0.00	0.816%	0.000%
1	TRS & I Group, Inc. Sandy Grant sgrant@trsigrup.com P 704-807-2627		Sub 100%	MBE	Submit Response	Not Reported	--	\$0.00	0.153%	0.000%
1	TVS NORTHCAROLINA PC [Removal request approved on 7/27/2019] KAREN ROY KROY@TVSDESIGN.COM P 404-946-6392	No	Sub 100%	SBE/MBE	Not included in audit			\$0.00	34.270%	0.000%

Click subcontractor name to view payment history for this contract. Click contact person's name to send them a message.

Return to Audit Notice

You must accurately enter your subcontractor payment information in the “audit information” box to complete the audit (see below). The information the system requests includes the amount paid for the audit period to the subcontractor, the payment date, whether you paid the subcontractor promptly, optional payment details (including invoice numbers, check numbers, etc.), ability to add optional supporting documents, and any comments you would like to leave to your Compliance officer about the payment. Click “review” at the bottom of the screen (not shown) to review the information you have entered and then confirm the audit to complete it. You must continue this process until all audits for your organization are complete. Each subcontractor in your audit will automatically receive an email from the system to confirm the payment amount you entered. They can choose to confirm the payment you entered *or report a discrepancy in the system*. It is very important that you provide as much information as possible so the subcontractor can confirm the information and prevent an unnecessary discrepancy.

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*** required entry**

Compliance Audit Information	
Compliance Audit Period	July 2019
Compliance Audit Number	04338518-0008

Previous Payment Information
No audits prior to this time period.

Subcontractor Information	
Subcontractor	RJ LEEPER CONSTRUCTION LLC
Vendor Number	20256097
Subcontractor Tier	Tier 1 subcontractor to HOLDER-EDISON FOARD-LEEPER A JV

Audit Information	
Enter the audit amount for the designated time period. You can attached files or add comments, if necessary.	
Amount PAID for July 2019 *	<div style="border: 1px solid black; padding: 2px;">\$ 300</div> <p>» Do NOT enter invoice amount.</p>
Payment Date *	<div style="border: 1px solid black; padding: 2px;">11/14/2019</div> <p>» Enter payment date if you made a payment for July 2019. » If multiple payments were made, enter the date of the first payment.</p>
Prompt Payment? *	<p>» Select a choice below if a payment amount is reported above. » "Prompt Pay" means payment within 20 days.</p> <p> <input type="radio"/> Yes - the subcontractor was paid within 20 days of HOLDER-EDISON FOARD-LEEPER A JV being paid by City of Charlotte. <input type="radio"/> No - the subcontractor was not paid within 20 days of HOLDER-EDISON FOARD-LEEPER A JV being paid by City of Charlotte. <input type="radio"/> N/A - we cannot determine if the subcontractor was paid promptly. </p>
Payment Detail	Enter details of PAID check numbers (or ACH references) and amounts for July 2019. This information is optional but will speed up the confirmation process. Payment details are displayed to RJ LEEPER CONSTRUCTION LLC.

When should I enter a payment into InclusionCLT?

You should enter the payment once you have released the funds to the subcontractor. *Subcontractors* should confirm the payment in the system once they *receive* the funds from your organization. Subcontractors should not report a discrepancy based solely on difference of date reported. Please see the image below to see what an audit looks like from a subcontractor's perspective:



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Confirm Reported Amount? *

[Show all
options
and fields](#)

A subcontractor
choosing
“incorrect” on
their audit will
create a
discrepancy

☒ **Correct** - the amount reported by the prime contractor as PAID to us is correct (\$50,000.00).

1. Payment Date: * (mm/dd/yyyy)

» If multiple payments were received, enter the date of the **first** payment.

2. Were you paid in accordance with the organization's prompt payment policy? *

- ☐ Yes - we were paid within 20 days of the prime being paid.
☐ No - we were not paid within 20 days of the prime being paid.
☐ N/A - we cannot determine if we were paid promptly.

☒ **Incorrect** - the amount reported by the prime contractor as PAID to us is not correct.

Final Payment? *

- ☒ **No** - our work on this contract continues.
☐ Yes - this is our last payment for this contract.
☐ N/A - we have not begun work on this project or we have not been paid yet for our work.

Is Prime Withholding Retainage? *

- ☐ No
☒ Yes

How much retainage is being withheld? * \$

» Enter total cumulative retainage being withheld the prime contractor.

When do you expect to receive it? (mm/dd/yyyy)

What is a discrepancy?

Discrepancies are created in the system when a subcontractor reports receiving a different payment amount than the one you have reported. Subcontractors may also report a discrepancy if there is *not enough information* for them to verify that they received your payment. InclusionCLT will send a notification to your organization if a subcontractor reports a discrepancy and the amount they have reported. You will then be able to check your records and report your original amount as correct, report the subcontractors amount as correct, or enter a new payment amount. These notes will be sent over to your compliance officer for review or intervention. The image below is an example of a discrepancy you would review:



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Select a resolution option, enter comments if needed, and click **Save Response**. You can respond to this discrepancy notice once. Further changes must be processed by the compliance officer.

Discrepancy Resolved? *	<input type="radio"/> The \$5,000.00 originally reported by the prime is correct. <input checked="" type="radio"/> The \$3,500.00 originally reported by the subcontractor is correct. <input type="radio"/> None of the amounts are correct. The amount should be \$ <input type="text"/>
Public Comments	These comments are visible to the compliance officer and the prime contractor. <input type="text"/>
Private Comments	These comments are visible ONLY to the compliance officer. <input type="text"/>
Attach File(s)	<input type="button" value="Attach File"/>
Confirmation	<input checked="" type="checkbox"/> Send me confirmation of my response.
<input type="button" value="Save Response"/>	

Managing Discrepancies in InclusionCLT

Contract Managers and the CBI Team are available to help investigate, document, and attempt to resolve any logged payment discrepancies in the system. Any discrepancy that you are not able to resolve with your subcontractor must be reported to your contract manager for assistance. Please reach out to your contract manager or the CBI Team if you have any questions about payment discrepancies.

What if I did not make a payment to one of my contractors during an audit period?

The system will automatically send you an audit notification for every subcontractor you have added to your contract for each audit period. Mark the payment as “zero” for any subcontractors you did not utilize for the audit period you are reporting on.

Managing Your Contract Long Term

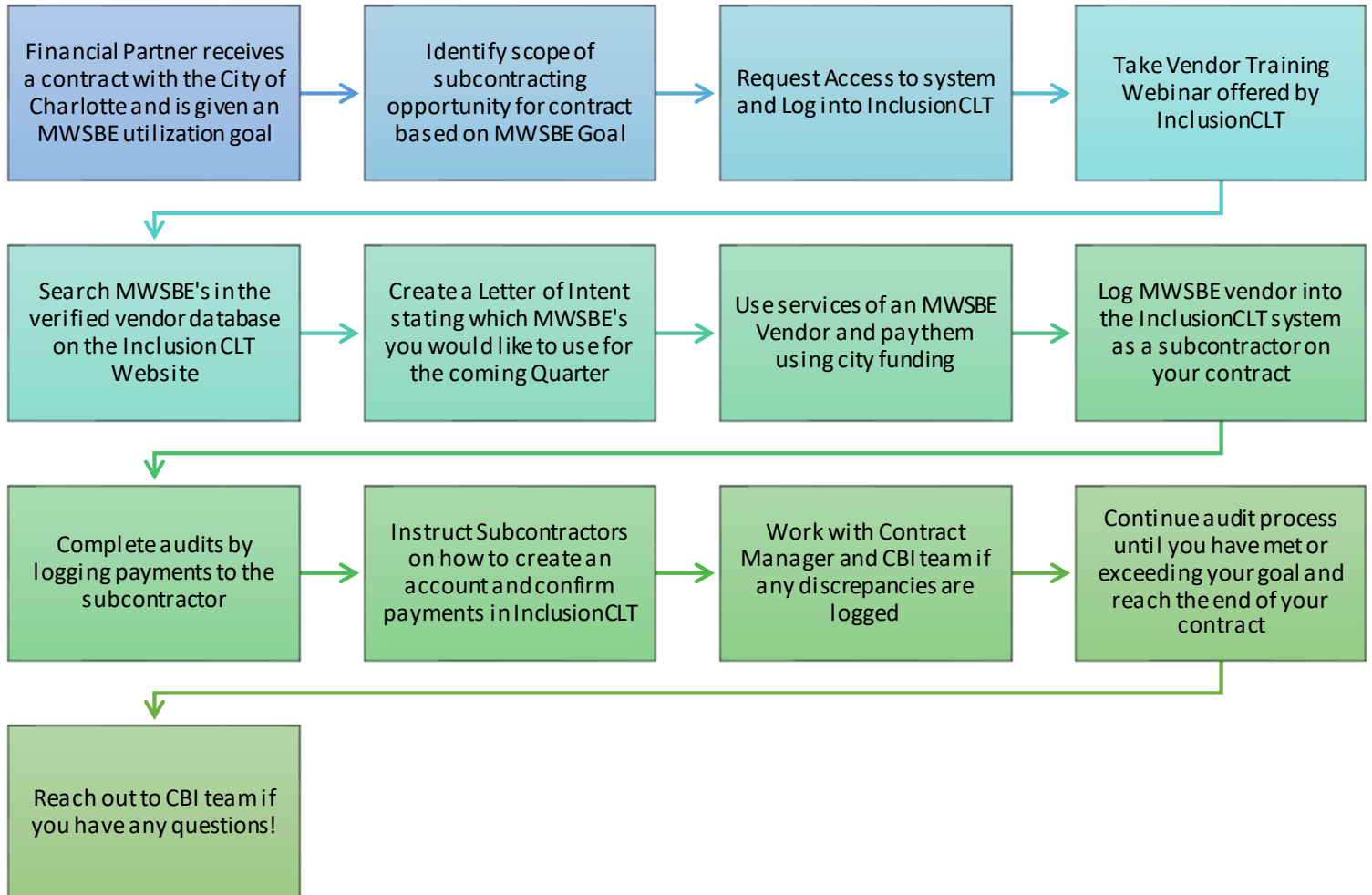
The main goal of InclusionCLT is to streamline payment information and help Financial Partners/Prime Contractors manage their MWSBE Goal. You will be able to see your goal progress each time you log a payment to an MWSBE subcontractor in the system. It is important to reach out to your Compliance Officer if you are nearing the end of your contract and have not completed your MWSBE goal. Any Prime/Financial Partner that does not complete their goal are at risk of losing good standing with the City of Charlotte and this can affect their ability to receive contracts with the city in the future. Financial Partners that do not meet their goal have the option to submit documentation for a [Good Faith Effort](#) (GFE) but it may not be approved. Please reach out to your Compliance Officer or the CBI team if you believe your contract is at risk of not meeting its goal, need creative solutions for reaching your goal, or need more information on submitting documentation towards a Good Faith Effort.



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InclusionCLT Review

You now have the tools to access your account, add additional users, complete audits for your organization, manage your goal in the system, manage discrepancies from subcontractors, and manage your MWSBE goal throughout your contracts lifecycle. Below is a graphic detailing the steps to completing your tasks in the InclusionCLT system:



Additional Resources

InclusionCLT offers free training webinars (**Front Page>> System Training>> Training**), City of Charlotte additional InclusionCLT guides (**Help & Support>> User Manual**), and support tickets (**Help & Support>> Contact Support**) for extra support on every part of the system. Webinars are offered weekly and include a question and answer portion with a live expert on the system. InclusionCLT (**Help & Support>> User Manual**) also provides real-time support using their helpline to speak with a training expert on the system if you have any questions not addressed in the user guide or webinars.

Always use the CBI Compliance Specialist as a resource. Please reach out if you have any questions!



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Current contact information is below.

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Summary

Financial Partners and the work they complete in InclusionCLT are vital to the success of the Charlotte Business Inclusion program. This system is an invaluable tool in ensuring the city is enforcing diversity and inclusion participation contractual agreements. Financial Partners efforts to maintain accurate and timely information helps the city assure economic development for its certified minority, women, and small businesses. Thank you for your dedication and help in assisting the City of Charlotte's certified firms.