



**METROPOLITAN ST. LOUIS SEWER DISTRICT**  
**PRISM USER MANUAL**  
**CONSTRUCTION PROJECTS**  
**MONTHLY INVOLVEMENT REPORTING**

**Revised November 16, 2015**

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## Logging into PRISM for the First Time

To access the PRISM Portal, please visit [www.pro.prismsystem.com](http://www.pro.prismsystem.com). As a new user, you will need to log into the system by following these steps:

1. For the User ID, enter your MSD Vendor Number.
  - a. This number will be provided to you by MSD.
  - b. This number will continue to be the primary account's User ID.
2. For the Password, enter your MSD Vendor Number again and click **Go!**
  - a. You will only complete this step once since you will be changing the password in the next step.



3. You will now be prompted to change your password from the temporary password to a password of your choosing.
  - a. The screen may look like it has not changed, but see the below screen shot.
  - b. You will enter your new password once and then again as confirmation. The password must be at least 8 characters in length and must include letters and numbers.
  - c. Press **Go!** You will be directed to the Dashboard for your company.



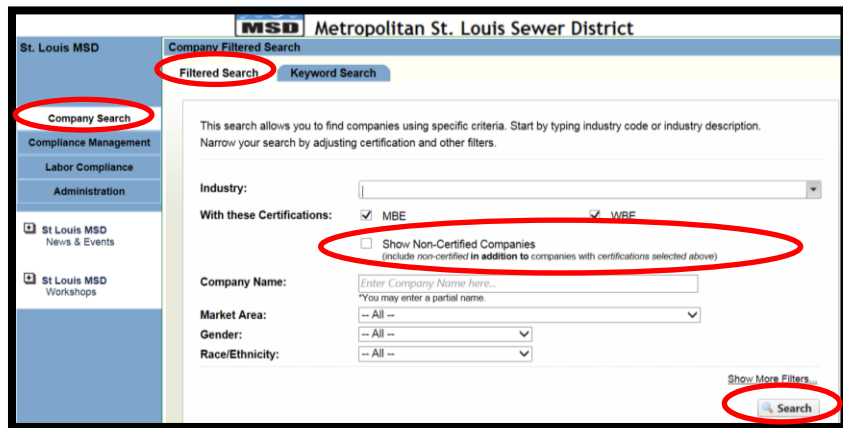
**\*\*Please Note:** When logging into the system, you only have 3 chances to attempt logging in before the system locks your account. If you are unsuccessful after your second password attempt, please click the “Need Logon Help?” link and you will receive an e-mail that allows you to reset your password.

# Introduction – The PRISM Modules

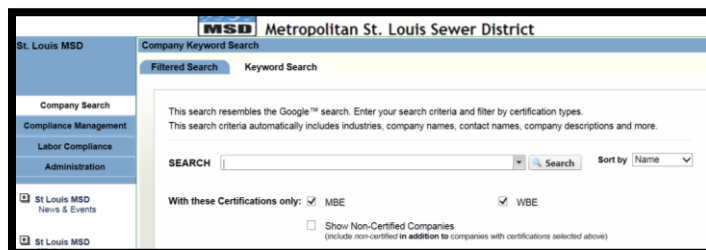
PRISM houses four distinct modules: Company Search, Compliance Management, Labor Compliance, and Administration. Please read the following to gain a better understanding of the functionalities of each module.

## 1. Company Search

- a. The **Company Search** module allows you to find companies using specific criteria.
- b. On the **Filtered Search** tab of the **Company Search** module, you can search for companies based on Industry, Certification Type, Company Name, Market Area, Gender, and Race/Ethnicity.
- c. **PLEASE NOTE:** The only companies listed in PRISM are companies that MSD has listed as vendors in our Main Enterprise System. We request that you still utilize the Certifying Agency lists when searching for qualified M/WBEs. Those agency listings will have the most complete, up-to-date data.
- d. A helpful function for the **Filtered Search** is the verification of Non-Certified companies. MSD is collecting the company information for Non-M/WBE subcontractors from the Prime Contractors so that we may enter those companies into PRISM. As you identify the Non-M/WBE subcontractors listed on your projects, you can utilize the **Filtered Search** to verify whether or not MSD has that company on file. If you locate the company in PRISM, there is no need to request the New Supplier Form and W9 from that company. Please remember to click the **Show Non-Certified Companies** checkbox when searching for Non-M/WBE subcontractors.



- e. The **Keyword Search** tab resembles the Google™ search. Enter your search criteria and filter by certification types. This search criterion automatically includes industries, company names, company descriptions, and more.



## 2. Compliance Management

- a. In the **Compliance Management** module, you can list all of your contracts/projects (active and closed) or you can search for specific contracts/projects. An enhancement request has been submitted requesting a way to separate the active from the closed projects.



- b. Please note the orange hat next to the contracts. These hats appear when a contract is assigned labor and/or workforce requirements. Since all contracts will require certified payroll submission, you will see these hats next to every contract on your list of contracts.

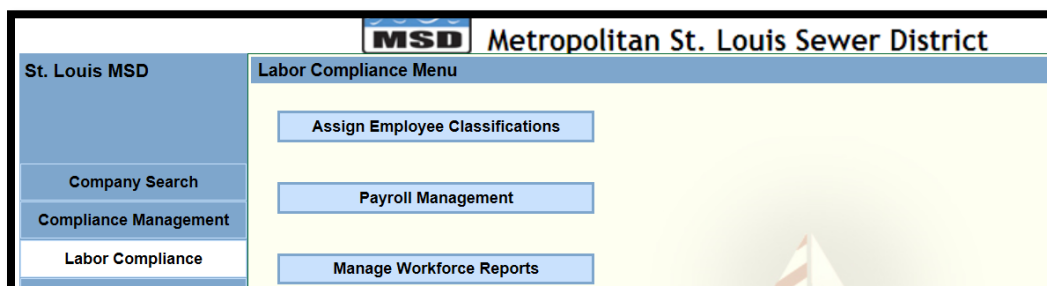
Contract/Task Order Number	Role	Sub Invoices Count	Sub Payments Count	Sub Industry	Buyer Department	Total Payments to Subs	Total Payments to Primes	Percentage Complete
130560	Prime	0	0	236 Construction of Buildings	Engineering	\$0.00	\$0.00	0
P-65789G	Sub	0	5			\$130,000.00	\$0.00	0

- c. After you click to choose the desired contract, you are able to list past payments to your subcontractors or report payments to subcontractors (Involvement Reporting).



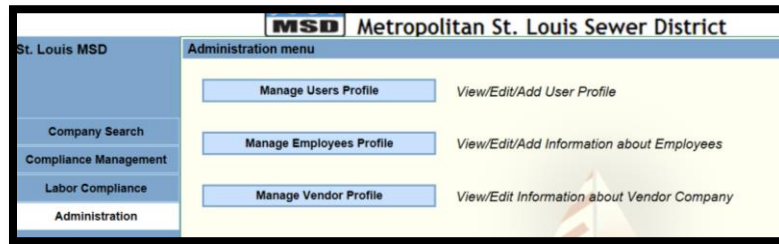
## 3. Labor Compliance

- a. In the Labor Compliance module, you can perform the following tasks:
  - i. Assign Employee Classifications
  - ii. Payroll Management
  - iii. Manage Workforce Reports



#### 4. Administration

- a. In the Administration module, you can perform the following tasks:
  - i. Manage User Profiles
  - ii. Manage Employee Profiles
  - iii. Manage Vendor Profile



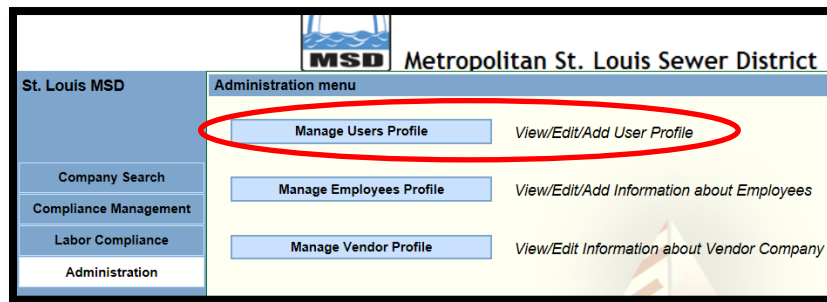
# Managing User Profiles

Your company may have more than one person utilizing the PRISM software system. PRISM allows up to 5 user profiles to fit those needs. To add a new user, please complete the following steps:

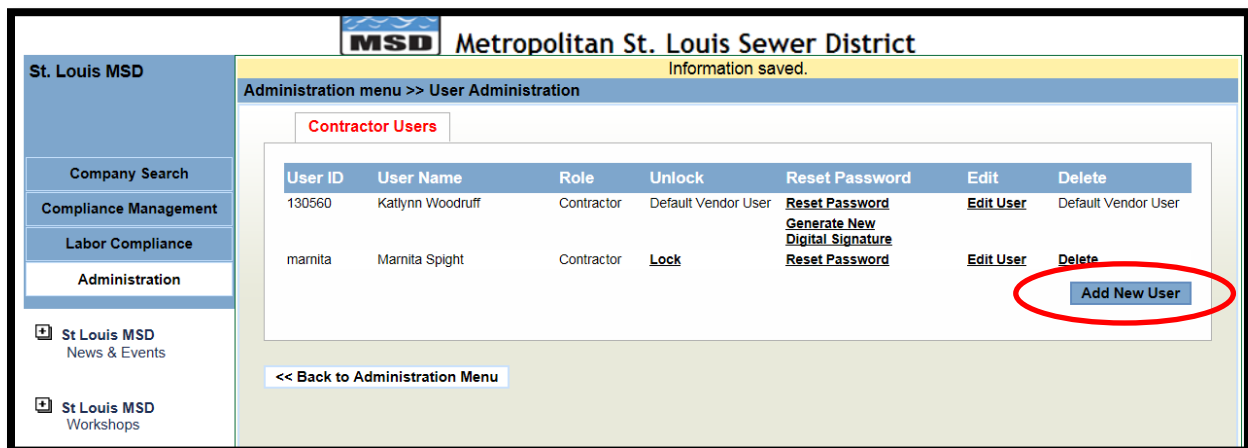
1. Click the **Administration** tab.



2. Click the **Manage User Profiles** button.



3. Click the **Add New User** button.



4. Fill in all information as required on the **Add Contractor User** tab and press **Save**.
  - a. Unlike the primary account's User ID, these User IDs can be anything you want; for example, the first name initial and last name spelled out.
  - b. The password must be at least 8 characters in length and must include letters and numbers.
  - c. Please ensure the e-mail address is correct so that this user may receive all notifications.

The screenshot shows a web application interface for the Metropolitan St. Louis Sewer District. The main header displays the MSD logo and the text 'Metropolitan St. Louis Sewer District'. Below the header, a navigation menu on the left lists various system functions: 'St. Louis MSD', 'Company Search', 'Compliance Management', 'Labor Compliance', and 'Administration'. The 'Administration' menu is currently selected. The main content area is titled 'Administration menu >> User Administration' and features a tab labeled 'Add Contractor User'. The form contains the following fields and values:

User ID*:	nuser
First Name*:	New
Last Name*:	User
Password*:	••••••••
Check Password*:	••••••••
Email*:	newuser@stlmsd.com
Title:	New User Example  x

At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is circled in red.



## Responsibilities of the Primary (Default) Account Holder

Whoever is assigned the Primary/Default vendor login account has the following responsibilities within the PRISM software:

1. Add New Users
2. Lock/Unlock Users
  - a. Locking a user prevents that user from logging into the PRISM system. Locking a user is at the discretion of the contractor.
  - b. Unlocking a user allows a user, who submitted 3 failed password attempts, to log into the PRISM system once more. When unlocking a user, it is wise to reset their password at the same time.
3. Edit Users
4. Reset Password
  - a. When you click the Reset Password button, an e-mail is sent to the user providing them with a new temporary password. After logging in under the temporary password, the user will be prompted to change their password.
5. Delete a User
  - a. You are able to delete users. PRISM will ask you to confirm before the deletion is complete.

MSD Metropolitan St. Louis Sewer District

Information saved.

Administration menu >> User Administration

Contractor Users

User ID	User Name	Role	Unlock	Reset Password	Edit	Delete
130560	Katlynn Woodruff	Contractor	Default Vendor User	<a href="#">Reset Password</a> <a href="#">Generate New Digital Signature</a>	<a href="#">Edit User</a>	Default Vendor User
marnita	Marnita Spight	Contractor	<a href="#">Lock</a>	<a href="#">Reset Password</a>	<a href="#">Edit User</a>	<a href="#">Delete</a>

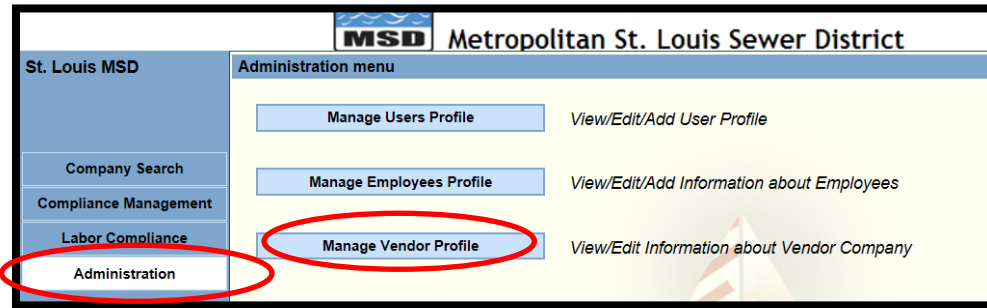
<< Back to Administration Menu

[Add New User](#)

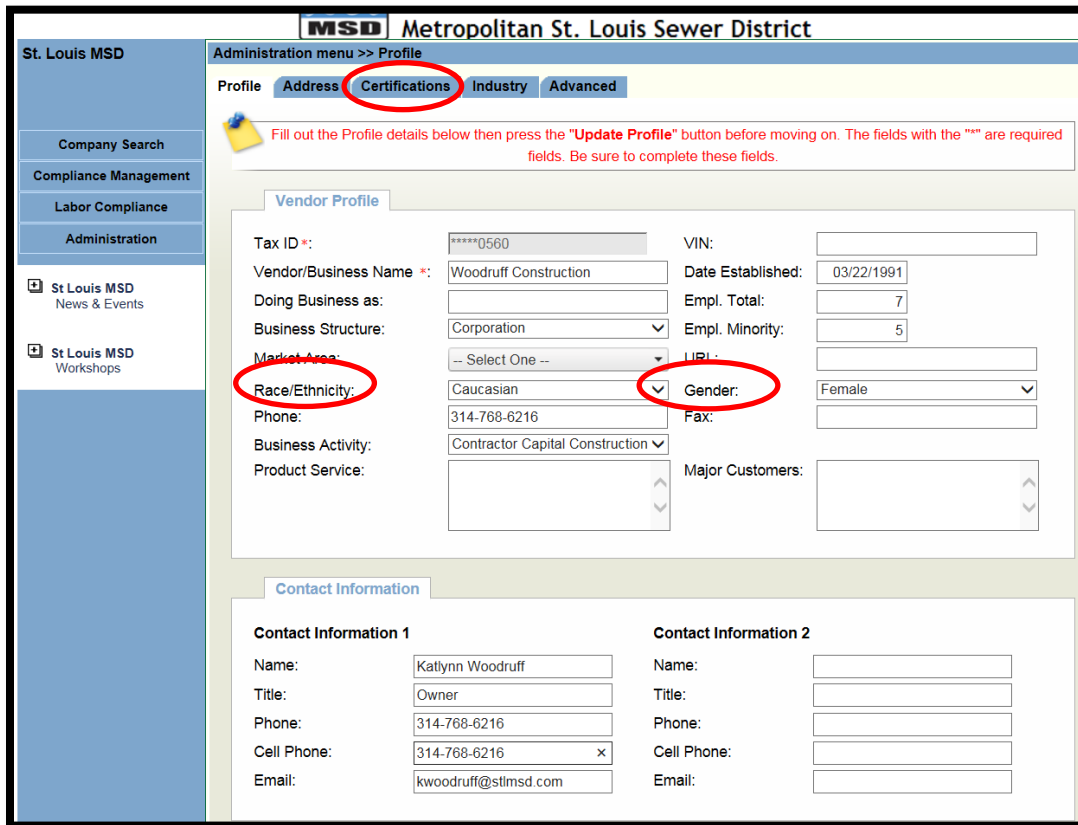
# Modifying Your Company Profile Information

If you would like to make changes to your PRISM Vendor Profile, please complete the following:

1. Under the **Administration** Module, click the **Manage Vendor Profile** button.



2. You may change any information under your profile aside from the Tax ID (We use the MSD Vendor Number).
  - a. Please ensure the Ethnicity and Gender fields are complete for the firm (not the individual who is signed in).
  - b. When updating **Address** information, please remember that only the Diversity Division of MSD will be accessing this software. If your company has a change of address, simply updating PRISM will not notify the remaining departments of MSD.
  - c. Please review the **Certifications** tab to verify your company's M/WBE certification information, if applicable. Please contact Katlynn Woodruff if any corrections are necessary.



**\*\*Final Reminder:** PRISM's Vendor Profile is for the use of the Diversity Division only. Other departments within the Metropolitan St. Louis Sewer District will not be accessing this information. Updating PRISM will not change the address for any future checks, purchase orders, or bid solicitation documents.

## Submitting Prime Payments to Subs (Involvement Reporting)

By the tenth calendar day of each month, MSD requires all Prime Contractors to report the payments made to their subcontractors in the previous month even if no payments were made. To complete your monthly involvement report, please do the following:

1. In the **Compliance Management** module, you will need to locate the contract for which you would like to submit an involvement report.
  - a. You may click the **List All Contracts/Task Orders** button to view all of your contracts (active and closed).
  - b. Or you may click the **Search for Contracts/Task Orders** button to search for your contract by contract number or project number.



2. Locate and select the contract for which you are submitting a report.

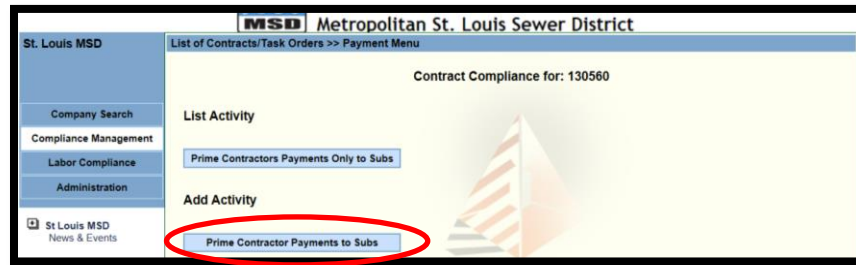
The screenshot shows a table titled 'List of Contracts/Task Orders (List All Contracts, 1-2 of 2)'. The table has columns for Contract/Task Order Number, Role, Sub Invoices Count, Sub Payments Count, Sub Industry, Buyer Department, Total Payments to Subs, Total Payments to Primes, and Percentage Complete. The first row is highlighted in yellow and has '130560' circled in red. The second row is highlighted in light blue.

Contract/Task Order Number	Role	Sub Invoices Count	Sub Payments Count	Sub Industry	Buyer Department	Total Payments to Subs	Total Payments to Primes	Percentage Complete
130560 Woodruff - Alamo Avenue	Prime	0	1	236 Construction of Buildings	Engineering	\$100.00	\$0.00	0
P-65789G Sewer Pipe repair	Sub	0	5			\$130,000.00	\$0.00	0

Please Note: PRISM identifies projects by the **Contract Number**. This number is different from the **Project Number** that most contractors use for MSD projects. In the example below, the **Contract Number** is the number highlighted in yellow – 20280. The **Project Number** is listed after the Project Name and in parentheses – 11663. You are able to search by **Project Number** or **Contract Number**.

**20280**  
**MIDLAND SANITARY RELIEF -**  
**PUBLIC AND PRIVATE III REDUCTION**  
**(11663)**

3. You can view any previous payments to your subcontractors by clicking the **Prime Contractors Payments Only to Subs** button under the **List Activity** heading.
4. To add an involvement report, click the **Prime Contractor Payments to Subs** button under the **Add Activity** heading.



5. You are now in the involvement reporting screen. You will need to report on each of the subcontractors assigned to your contract regardless of whether payments to that subcontractor were made or not.
  - a. Select the sub for which you are reporting.
  - b. **Invoice Number:** Enter the **Work Confirmation Number** provided on your MSD Payment Application. In order to approve Payment Applications, Engineering must see a report submitted for each subcontractor and identified with the Work Confirmation Number.
  - c. **Invoice Amount:** Enter the amount you paid the subcontractor for the reporting period.
    - i. You will need to enter a separate payment for each subcontractor – even if they did not receive a payment that period. In that case, you will need to enter \$0.00 in the **Invoice Amount** and **Amount Paid** fields.
  - d. **Amount Paid:** Re-enter that amount from the **Invoice Amount** field.
  - e. **Reference #:** Enter the Invoice Amount being billed to MSD as listed on the Pay Application. For example, if you company invoiced MSD \$50,000 for September 2015, enter “\$50,000” in this field
  - f. **Date Sent:** Enter the **Period End Date** in the **Date Sent** field. For example, if you are reporting for the month of September, you will enter **09/30/2015**. It is important that this date is accurate.
  - g. Check your entries and then click **Add Payment**. This payment will then show on the list below the Add/Update tab under Vendor Payments.

6. Please note the **No Reporting Activity** check boxes below.

- a. If you received a Payment Application from MSD and do not have any M/WBE sub-payments to report for that Payment Application, please complete the following:
  - i. Complete all steps as stated under #5 on the preceding page. When you enter the payment amounts, simply enter zero dollars.
  - ii. You will need to complete this step for each M/WBE subcontractor.
  - iii. It is important to submit these zero dollar payments in this manner because MSD’s Engineering office will be viewing these Involvement Reports when they are approving your pay application. When they view this report, they will need to see the payments associated with the **Work Confirmation** number, even if the payment is zero dollars.

Contractors	Invoice #	Invoice Amount	Amount Paid	Sent Date	Reference #	Status	Ref.	Edit	Delete
Direct Report: Woodruff Construction Sub: M/WBE Subcontractor (MBE)	12345, 015.1.1-2	\$13,600.00	\$1,600.00	07/31/2015		Not Responded		Edit	Delete
Direct Report: Woodruff Construction Sub: M/WBE Subcontractor (MBE)	12345, 015.1.1-1	\$1,500.00	\$1,500.00	08/30/2015		Not Responded		Edit	Delete

- b. If you did not receive a Payment Application from MSD and you do not have any M/WBE sub-payments to report for the previous month, simply complete the following steps:
  - i. Check the **All My Subs** to the right of **No Reporting Activity**.
  - ii. Click the **Add Payment** button.
    - 1. **\*\*You do not have to choose a sub, enter an invoice (work confirmation) number, or enter any data. You are finished for that month’s reporting.**
    - 2. You will notice that the **Invoice #** displayed in your **Vendor Payments** list for these monthly reports begins with **NAR**, which stands for “No Activity Report.” This will not cause an issue because Engineering will not need to verify this report since a Payment Application is not present for this reporting period.

Contractors	Invoice #	Invoice Amount	Amount Paid	Sent Date	Reference #	Status	Ref.	Edit	Delete
Direct Report: Woodruff Construction Sub: M/WBE Subcontractor (MBE)	NAR09252015	\$0.00	\$0.00	09/25/2015		Not Responded		Edit	Delete
Direct Report: Woodruff Construction Sub: M/WBE Subcontractor (MBE)	12345, 015.1.1-3	\$0.00	\$0.00	08/31/2015		Not Responded		Edit	Delete
Direct Report: Woodruff Construction Sub: M/WBE Subcontractor (MBE)	12345, 015.1.1-2	\$13,600.00	\$1,600.00	07/31/2015		Not Responded		Edit	Delete
Direct Report: Woodruff Construction Sub: M/WBE Subcontractor (MBE)	12345, 015.1.1-1	\$1,500.00	\$1,500.00	08/30/2015		Not Responded		Edit	Delete

**\*\*Please Note:** For all active contracts, reminders will be sent out to the contractor and MSD when a monthly involvement report has not been submitted by the 10<sup>th</sup> calendar day of each month. Failure to submit involvement reports on time may lead to a delay in payment from MSD.

## ADDITIONAL NOTES FOR PRISM USERS

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- To view PRISM's Vendor Tutorials, please visit <https://stage.prismcompliance.com/etc/vendortutorials.htm>
- This PRISM Manual will be updated as necessary, and the new version will be sent out immediately. If you locate an errors within this manual, please notify Katlynn Woodruff.
- At this moment, no e-mail notifications are active. MSD will be performing manual validation checks on the 11<sup>th</sup> of each month to ensure all reporting is up-to-date.
- At this moment, Workforce Reporting is still to be performed manually on the Workforce Utilization form as normal and sent to Marnita Spight. Once the final Workforce Configurations are complete, this manual will be updated and you will receive a revised copy so that you may begin reporting your Workforce electronically in the PRISM Portal.
- Please remember, a large portion of this manual involves initial setup information. Once you have completed these setup initiatives, you will simply be responsible for the maintenance of your account as well as reporting.
- PRISM can be located from any computer that has internet access.
- Please direct all questions to Katlynn Woodruff via email ([kwoodruff@stlmsd.com](mailto:kwoodruff@stlmsd.com)) or via telephone (314-768-6216).