

# MWBE Quarterly Reporting User Guide

The instructions below provide guidance on the MWBE Quarterly Reporting. Use the tabs below to learn more about the forms required for completion before submitting the report. You can also watch a recording of the training delivered on September 27, 2022 below:

Your browser does not support the HTML5 video element

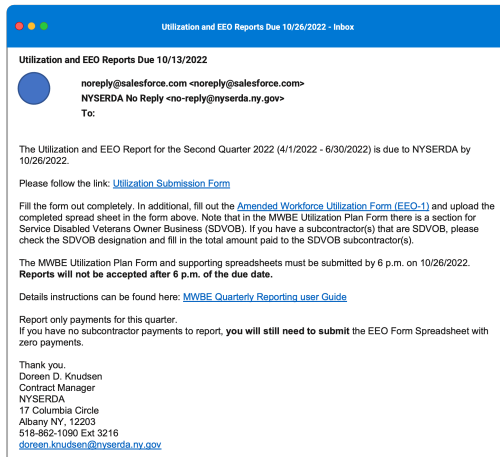
## Utilization Submission Form

- The steps below provide details on the functionalities within the Utilization Submission Form.
- This form must be completed prior to **6 p.m.** on the due date provided within the email communication.
- The Utilization Submission Form link will always point to the same form, even if it has already been completed.
- Clicking this link does not generate a blank form unless it is the first time the form is being completed.

1

The Quarterly Reporting will be requested through a Salesforce generated email notification, click on the hyperlinks in the email to complete the following:

1. **Quarterly Reporting Utilization Submission Form**
2. **Amended Workforce Utilization Form (EEO-1)**



2

### Contractor:

This section provides a summary of the contract.

3

### Subcontractors:

Allows users to add new subcontractors. When adding a subcontractor, please provide the following:

- **Name**
- **Address**
- **Email**
- **Phone Number**
- **MBW, WBE, and/or SDVOB status**

- At least one of these options must be selected in order to save or submit the form.
- The phone number and email fields are not required but must contain the correct format in order to save or submit the form.
- The initial subcontractor information is automatically saved when the **Add Subcontractor** option is clicked.

4

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**Attachments:**

A completed **Amended Workforce Utilization Form (EEO-1)** must be attached as part of the quarterly MWBE reporting. For more information on accessing and completing this form, click the **Amended Workforce Utilization Form (EEO-1)** tab above.

The form will only accept Excel and PDF files when uploading attachments.

5

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**Prepared By:**

Provide the following personal information before submitting the form:

- **Name**
- **Title**
- **Email**
- **Phone Number**
- **Verification Checkbox**

6

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Click the **Submit** button to submit the Utilization Submission Form.

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**MWBE UTILIZATION PLAN FORM**

**2 Contractor**

Contractor Name			
Contractor Address			
Contract Number / Master Id			
Contract Value			
Total Invoice Amount for Period			
Total Payment Amount for Period			
Reporting Contact Name			
Reporting Contact Email			
MWBE/SDVOB Subcontractor Reporting Required			
Reporting Period			
Reporting Due Date			

List all MWBE/SDVOB Subcontractors name, address, phone number and email address for each subcontractor. (Check appropriate box if firm is a certified MBE/WBE/SDVOB)

**3 Subcontractors**
Subcontractor Total: \$0

Name	Federal ID No.	Phone	Email	<input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> SDVOB	Subcontractor Payment Amount	Brief description of Work
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>

[ADD SUBCONTRACTOR](#)

**4 Attachments**

Workforce Utilization (EEO) Report

[Choose File](#) | No file chosen [Add Attachment](#)

**5 Prepared by:**

Name	Title
<input type="text"/>	<input type="text"/>
Phone	Email Address
<input type="text"/>	<input type="text"/>

Attestation

I verify this information is accurate.

☐

[PRINT](#)
[SAVE](#)

**6**
[SUBMIT](#)

## Amended Workforce Utilization Form (EEO-1)

1

Click the **Amended Workforce Utilization Form (EEO-1)** hyperlink in the email communication.

**Utilization and EEO Reports Due 10/13/2022**



noreply@salesforce.com <noreply@salesforce.com>

NYSERDA No Reply <no-reply@nyserda.ny.gov>

To:

The Utilization and EEO Report for the Second Quarter 2022 (4/1/2022 - 6/30/2022) is due to NYSERDA by 10/26/2022.

Please follow the link: [Utilization Submission Form](#)

Fill the form out completely. In addition, fill out the [Amended Workforce Utilization Form \(EEO-1\)](#) and upload the completed spread sheet in the form above. Note that in the MWBE Utilization Plan Form there is a section for Service Disabled Veterans Owner Business (SDVOB). If you have a subcontractor(s) that are SDVOB, please check the SDVOB designation and fill in the total amount paid to the SDVOB subcontractor(s).

The MWBE Utilization Plan Form and supporting spreadsheets must be submitted by 6 p.m. on 10/26/2022.  
**Reports will not be accepted after 6 p.m. of the due date.**

Details instructions can be found here: [MWBE Quarterly Reporting user Guide](#)

Report only payments for this quarter.

If you have no subcontractor payments to report, **you will still need to submit** the EEO Form Spreadsheet with zero payments.

Thank you.

Doreen D. Knudsen

Contract Manager

NYSERDA

17 Columbia Circle


Albany NY, 12203

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The page will redirect to the **Executive Order 162 Website**. Click on the **5. Amended Workforce Utilization Form (EEO-1)** hyperlink to download the form.



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HOME / DOING BUSINESS IN NY / MWBE / MWBE EXECUTIVE ORDER 162






## Executive Order 162 – Ensuring Pay Equity By State Contractors

Executive Order 162 requires state contractors to disclose data on the gender, race, ethnicity, job title, and salary of employees performing work on state contracts issued and executed on or after June 1, 2017. After consideration of the public comment submitted regarding the proposed Implementation Guidance, the Guidance was amended accommodate such comments.

Commencing January 1, 2018, New York State Agencies and Authorities will require that all contracts and procurements subject to Executive Law Article 15-A and issued by on or after June 1, 2017 be required to comply with this additional disclosure requirement, and will require prime contractors to require the same information to be submitted by any of their subcontractors on the state contract. Contractors should consult with their relevant contracting agency or authority to determine the specific details regarding the reporting date and any other additional requirements for their designated contract or procurement.

The final guidelines and supporting materials include the following:

1. [Final Implementation Guidance](#)
2. [Frequently Asked Questions and Responses](#)
3. [Summary of Comments Received during Notice and Comment Period and Responses](#)
4. [Instructions for Submitting Workforce Utilization Form \(EEO-1\)](#)
5. [Amended Workforce Utilization Form \(EEO-1\)](#)



3

Locate the form in your download folder, the form should open up as an Excel sheet.

4

Then, fill in all required information within the Excel sheet before submitting.

If you need help completing the Amended Workforce Utilization Form (EEO-1) Form, please refer to **4. Instructions for Submitting Workforce Utilization Form (EEO-1)** on the website.