Tier 2 Submission Guide
Tier 2 Subcontractor Reporting

- In an effort to try and help promote business opportunities for diverse businesses, (such as: minority-owned, woman-owned, veteran-owned, service-disabled veteran-owned, and LGBT-owned businesses) in relation to Clients, a company-wide Tier 2 direct spend reporting initiative has been established and is conducted annually using a software called Wood Mackenzie Supply Chain (PowerAdvocate). The information provided is used to evaluate compliance.

- By utilizing the Wood Mackenzie Supply Chain (PowerAdvocate) platform for this process, Clients have automated how we request, communicate, gather, and consolidate reports from all the suppliers providing Tier 2 subcontractor diversity data.

- If there are specific questions about spend reporting within the Portal – please contact the Client directly.

- Technical questions related to using the Wood Mackenzie Supply Chain (PowerAdvocate) platform (such as login issues) – please contact PowerAdvocate Support at support@poweradvocate.com or 857-453-5800 between 8AM – 8PM ET (Mon-Fri).
Important Details

- **Expectations**: We encourage primes to submit both Direct & Indirect data; however, without diverse subcontracting in a month, **submitting $0 may be required**.

- **Company Information Disclosure**: If you have concerns or limitations on disclosing certain details to the Client (e.g., Total Company Sales), please contact the Client directly.

- **Confirmation of Submission**: After you have selected Save and/or Submit at the end of each questionnaire, you will be returned to the “Fill out Questionnaires” tab. Your responses were successfully received. **Please be sure to save frequently to avoid loss of data entry**.

- **Corrections and Modifications**: Should you need to make a correction or update to a previously submitted form, you can re-enter the questionnaire and make these changes, and upon selecting "Submit" your report will be immediately updated.
Submitting $0 Spend for a Month

- To ensure that there is an appropriate differentiation between a $0 spend submission and a no-response (blank) submission, please submit $0.01 for every instance of $0 reported spend.

**How to report a $0 submission:**

- If you are reporting $0 spend for just one month, then the $0.01 will be among actual spend of the other months.

<table>
<thead>
<tr>
<th>Tier 2 Supplier</th>
<th>Diversity Classifications</th>
<th>Business Unit</th>
<th>City</th>
<th>State</th>
<th>Zip Code</th>
<th>Purchase Order #</th>
<th>January</th>
<th>February</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC Company</td>
<td>Woman-Owned Business Enterprise (WBE)</td>
<td>Nuclear Generation</td>
<td>Saint Louis</td>
<td>MO</td>
<td>63103</td>
<td>N/A</td>
<td>$985,983.00</td>
<td>$0.01</td>
</tr>
</tbody>
</table>

- If you are reporting $0 spend for the year for all subcontractors, please enter “No Subcontracting” into the supplier field, select any diversity classification, select any business unit, and enter $0.01 in each of the months.

<table>
<thead>
<tr>
<th>Tier 2 Supplier</th>
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<td>63103</td>
<td>N/A</td>
<td>$0.01</td>
<td>$0.01</td>
</tr>
</tbody>
</table>

If you are reporting $0 for the year, for a single subcontractor, just remove this supplier from the year’s form with the “X” on the far-right side of the row.
Company Registration

User Setup & Login

- Step 1 – Login using your Case-Sensitive Username & Password
  - [https://www.poweradvocate.com/login.jsp](https://www.poweradvocate.com/login.jsp)

- If you have not yet registered on the Wood Mackenzie Supply Chain platform, please first do so at:

![Login Page Screenshot]
Portals

Users Access All Their Portals via the "My Portals" Tab

- Step 2 – From the “My Portals” Panel on your Dashboard, select the specific Tier 2 Reporting portal by clicking the Portal Name for the Portal you wish to access. Please see the example image below.

If you do NOT see the specific Client Portal you need to access, the Client will need to provide your account access to the specific Portal.

My Portals

<table>
<thead>
<tr>
<th>Actions</th>
<th>Company</th>
<th>Portal Name</th>
<th>Portal Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Wood Mackenzie Supply Chain</td>
<td>Tier 2 Reporting</td>
<td>Nicole Stewart</td>
</tr>
</tbody>
</table>
Portal Main Page

Initially Displays Documents & Guides

- Step 3 – Select the “Fill Out Questionnaires” tab. See example below:
Accessing Questionnaires

Displays All Tier 2 Questionnaires

- Step 4 – Select the questionnaire to begin entering data. If there are multiple questionnaires to fill out, such as “Tier 2 Direct [or Indirect] (Monthly)” for Direct [or Indirect] Spend Submissions, then you will need to review both questionnaires accordingly. Please see the example below:
Direct Tier 2 Questionnaire

Displays Fields for Prime Suppliers

- Step 5 – Open to the current year’s reporting form by using the calendar arrow, and next enter the names of your diverse certified subcontractors.
  - If you used this Tier 2 software last year, then the first 3 fields (Tier 2 Supplier, Diversity, and Business Unit) will auto-populate for you.
    - To remove suppliers from a selected year, remove the entire row with the “X” button at the far-right of the row for that particular supplier.
    - To add new suppliers, select “Add Supplier” to create new rows.

Note: If your company does not collect details of “Tier 2 Supplier” names, please report by designation (e.g. MBE), using a separate row for each classification.
Direct Tier 2 Questionnaire

Displays Fields for Prime Suppliers

- Step 6 – Select the classifications for each of your diverse subcontractors by choosing “Select Classifications” and checking off one or more designations in the pop-up view. Example below:

Reminder: Diversity Classifications will pre-load from last year’s submission. Please modify if the information has changed.
Direct Tier 2 Questionnaire

Displays Fields for Prime Suppliers

- Step 7 – Select the Business Unit for each of your diverse subcontractor-business unit-spend associations by choosing “Select Value” and checking off one option.
  - Diverse subcontractors who conducted business with multiple Business Units should be entered in separate rows and spend divided accordingly.

Reminder: Business Units will pre-load from last year’s submission. Please modify if the information has changed; and Save your progress frequently.
Step 8 – Select the Product/Service for each of your diverse subcontractor spend associations for your company’s Tier II Spend Submission, by locating the “Product or Service” column, clicking “Select Value,” and checking off one option. **Note:** This field is required for both Direct and Indirect Spend submissions.

**Reminder:** Select a Product/Service category that most appropriately relates to or represents the spend that’s being entered; and Save your progress frequently.
Display Fields for Prime Suppliers

- Step 9 – Type in City, State, Zip Code, and Purchase Order #
  - All fields are required.

**Note**: In the field State type in the 2-Letter State Abbreviation Codes (Ex. MO for Missouri)

**Note**: If you do not have a Purchase Order # please type in “N/A”
Direct Tier 2 Questionnaire

Displays Fields for Prime Suppliers

- Step 10 – Enter the direct spend conducted with each diverse subcontractor by month in the appropriate columns.
Direct Tier 2 Questionnaire
Displays Fields for Prime Suppliers

- Step 11 – Select the “Add Supplier” button to add additional blank rows for additional subcontractor entries to the form.

- Please be sure to Save your progress frequently as you submit data. Once you are done completing these entries, select “Submit” at the bottom of the page. Your responses will have been Submitted as you are returned to the “Fill Out Questionnaires” tab.
Accessing Questionnaires

*Displays All Tier 2 Questionnaires*

Step 12 – If applicable, select the next questionnaire, here “Diversity Tier 2 Indirect (Monthly)” for **Indirect Spend Submissions**
Indirect Tier 2 Questionnaire

*Displays Fields for Prime Suppliers*

- Step 13 – Enter your **Total Sales** by month and total **Sales to Buyer (The Client)** by month in the appropriate fields.
Indirect Tier 2 Questionnaire
 Displays Fields for Prime Suppliers

Step 14 – Enter either a Tier 2 Supplier or Supplier Group (to report an aggregate number for one classification type) in the first row of the “Tier 2 Supplier” field by selecting the “Add Supplier” button.

- If you used PowerAdvocate last year, then the first 3 fields (Tier 2 Supplier, Diversity, and Business Unit) will auto-populate for you. To remove suppliers, remove the entire row with the “X” at the far-right area of the screen for the designated supplier.

**Note**: If your company does not collect details of “Tier 2 Supplier” names, please report by designation (e.g. MBE), using a separate row for each classification.
Indirect Tier 2 Questionnaire
Displays Fields for Prime Suppliers

- Step 15 – Select the classification(s) for each diverse subcontractor by choosing “Select Classifications” and checking off **one or more designations** in the pop-up view
  - OR the classification for your previously entered Supplier Group by choosing “Select Classifications” and checking off **only one designation**!

**Reminder**: Diversity Classifications will pre-load from last year’s submission. Please modify if the information has changed. Please be sure to Save your responses frequently to avoid entry loss.
Indirect Tier 2 Questionnaire

Displays Fields for Prime Suppliers

- Step 16 – Enter the spend conducted with each Tier 2 Supplier/Supplier Group by month in the appropriate columns
Indirect Tier 2 Questionnaire
Displays Fields for Prime Suppliers

杠杆 17 – 选择“Add Supplier”按钮以在表单中添加额外的空白行，用于报告多个间接供应商/供应商组。

在完成这些条目后，请确保经常保存进度，以避免数据输入丢失。完成这些条目后，请选择“Submit”在页面底部。您的响应如果被重新返回到“Fill Out Questionnaires”标签，则可以视为已提交。
Definitions

*Tier 2 Reporting Uses Specific Terminology*

- **Prime Supplier** - A Tier 1 supplier that provides products/services and invoices to the Client for goods and services rendered directly by that supplier.

- **Tier 2 Supplier** - A subcontractor that provides the products/services and invoices to the Prime Supplier for goods and services that directly support the fulfillment of a particular Client contract.

- **Direct Spend** - Spend contracted by the Prime Supplier with Tier 2 diverse subcontractors for goods and services that directly support the fulfillment of a particular Client contract.

- **Indirect Spend** - Total spend contracted by the Prime Supplier to all of its Tier 2 diverse subcontractors. This amount is prorated based on a Prime Supplier’s sales and/or percentage of the Prime’s total revenue associated with the Client.
Definitions

Classifications

- **MBE** – (Minority-Owned Business Enterprise) means an enterprise that is at least 51% owned by one or more minority groups, where management and daily business operations are controlled by one or more of those individuals. Minority owned business include African Americans, Hispanic Americans, Native Americans, Asian Pacific Americans and Asian Sub-Continent Americans.

- **WBE** – (Women-Owned Business Enterprise) means a business enterprise that is at least 51% owned by a woman or women or at least 51% owned by one or more women, and whose management and daily business operations are controlled by one or more of the individuals.

- **LGBT** – (Lesbian, Gay, Bi-Sexual and Transgender) means a business enterprise that is at least 51% owned by a lesbian, gay, bisexual or transgender individual and whose management and daily business operations are controlled by one or more of the individuals.

- **Service-Disabled Veteran Owned Business** – means a business owned by a veteran or veterans that were disabled during war.

- **Veteran Owned Business** – means a business owned by a veteran or veterans.
### Definitions

#### Definition Codes

<table>
<thead>
<tr>
<th>Code</th>
<th>Definition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AA</td>
<td>African American</td>
<td>- Persons having origin in any black racial groups of Africa</td>
</tr>
<tr>
<td>HI</td>
<td>Hispanic American</td>
<td>- Persons of Mexican, Puerto Rican, Cuban, South or Central American, Caribbean, and other Spanish culture origin</td>
</tr>
<tr>
<td>NA</td>
<td>Native American</td>
<td>- Persons having origin in any of the peoples of North America or the Hawaiian Islands, in particular, American Indians, Eskimos, Aleuts, and Native Hawaiians</td>
</tr>
<tr>
<td>AP</td>
<td>Asian Pacific American</td>
<td>- Persons having origin in Japan, China, the Philippines, Vietnam, Korea, Samoa, Guam, the United States Trust Territories of the Pacific, Northern Marianas, Laos, Cambodia, Taiwan</td>
</tr>
<tr>
<td>AS</td>
<td>Asian Sub-Continent American</td>
<td>- Persons having origin in India, Pakistan, Bangladesh</td>
</tr>
<tr>
<td>LGBT</td>
<td>Lesbian, Gay, Bi-Sexual and Transgender</td>
<td>- Persons who are lesbian, gay, bi-sexual and transgender</td>
</tr>
<tr>
<td>SDVB</td>
<td>Service Disabled Veteran Owned Business</td>
<td>- Persons that were disabled during time of war</td>
</tr>
<tr>
<td>VOB</td>
<td>Veteran Owned Business</td>
<td>- Persons who have served in a military force</td>
</tr>
</tbody>
</table>