Internal Workflow: Certified Payroll Project Setup with Subcontractors in Kaster (via Procore or Vista Integration)

1. Import Project into Kaster

In Kaster, click the '+' icon in the top-left of the Projects list section, and select 'Import Project From (Procore or Vista)'. Then, find the desired project and click the 'ADD' button to import it.

2. Sync the Project Directory

Navigate to the imported project from Step 1, select the 'Directory' tab, and click the blue 'Add Contacts' icon. This will sync with the imported project's directory and let you import companies associated with the project.

3. Add the Certified Payroll Requirement

- ○ Go to the 'Recurring Docs' tab of the project.
- ○ Click the 'Manage' icon, click the 'ADD NEW +' button and select 'Certified Payroll' as a required compliance item from the dropdown.

4. Configure the 'Certified Payroll' Settings

Within the 'Certified Payroll' item:

- ○ Assign internal collaborators responsible for tracking submissions.
- ○ Set the submission frequency to "Weekly".
- ○ Set the "first period ending date" for the project. This date acts as the anchor Kaster uses to automatically generate all future weekly reporting periods. Most users select the first *Saturday* that work was performed on the project.
- ○ Choose how many "delay days" after each period ends Kaster should send email reminders. For example, selecting 3 days will send reminders on the following *Tuesday* when the period ending date is

Saturday.

5. Assign Subcontractor Collaborators

From the 'Recurring Docs' tab, select each subcontractor's company and use the 'Collaborators' button to assign external users who will manage submissions and receive the notifications.

6. Upload Wage Determination (Recommended)

This step is recommended to speed up setup using AI-powered extraction, but wage classifications can also be added manually in Step 7.

- Navigate to the 'Certified Payroll' tab and select 'Requirements'.
- Click the dropdown icon on the far right of the Wage Determination section to upload the applicable PDF for the project.
- After uploading, wait a few seconds—Kaster's AI will automatically scan the document and generate a list of wage classifications for you to review and edit.
- Click 'Refresh' periodically until the status shows 'Done', then refresh the page to view the imported list.

7. Review & Finalize Wage Rates

- Review the imported wage rates within the system.
- Edit or adjust any wage classifications as needed to align with project requirements.
- Manually add any missing wage rate requirements by clicking the '+ ADD' button.
- Finalize the list before beginning subcontractor onboarding.

✅ Once these steps are complete, your project is fully configured and automated for subcontractor certified payroll compliance in Kaster.