



FI\$Cal

Financial Information System for California

**SB/DVBE Bidder &
Vendor Certification
Business Process Workshop
(BPW)**

October 22, 2014

Agenda

- FI\$Cal Project Overview
- Business Process Workshop Objectives and Approach
- FI\$Cal Solution Overview
- SB/DVBE Application Flow
- SB/DVBE Overview
- Configure SB/DVBE Certification Application
- Apply for SB/DVBE Certification: 2 Step Process
 - Bidder Registration
 - Apply for SB/DVBE Certification

Agenda

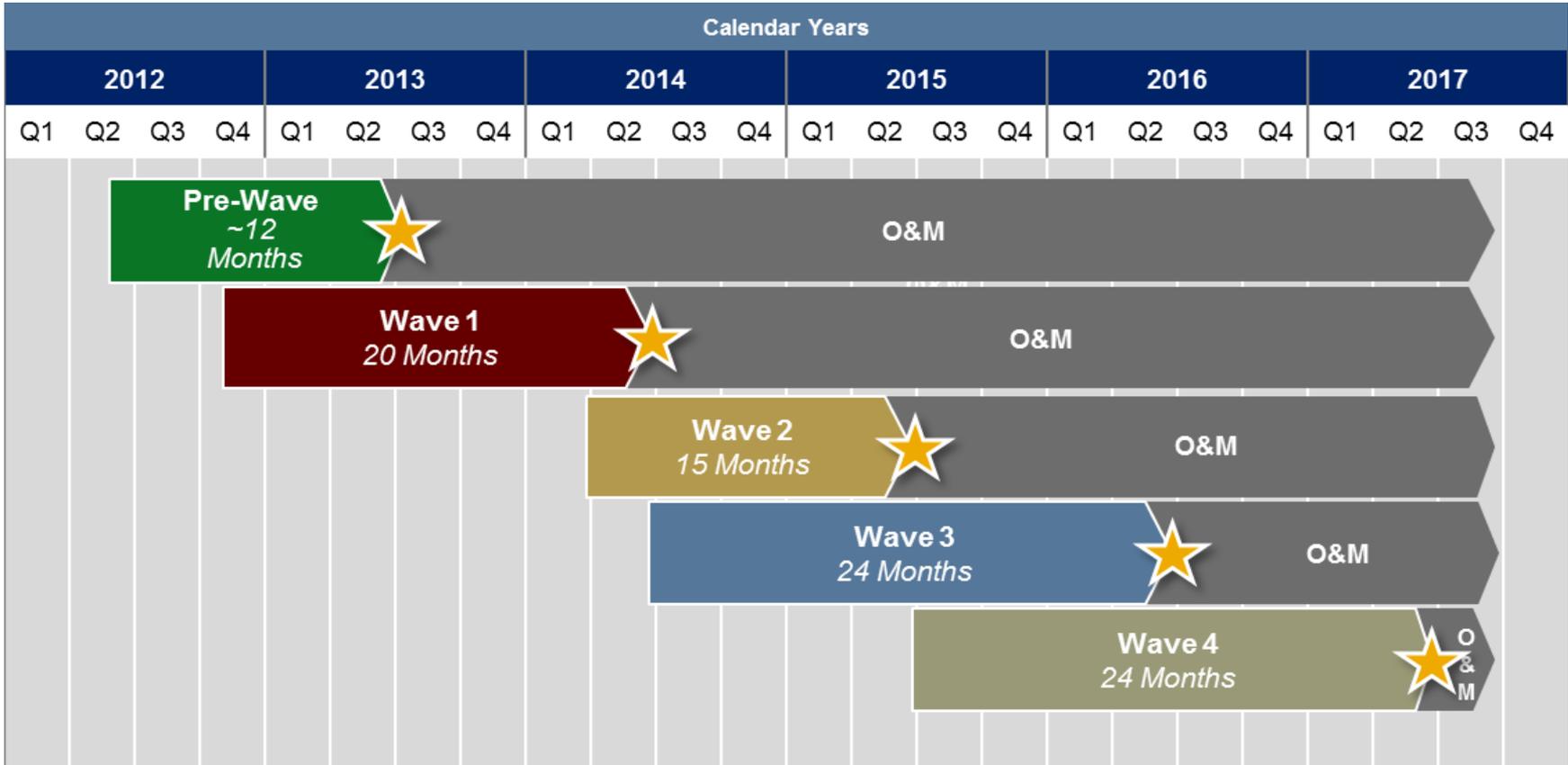
- Record SB/DVBE Information in Transactions
- DGS SB/DVBE Certification Inquires and Reporting
 - Daily Certification Reports
 - Management Reports
 - SB/DVBE Contracting Activities
 - Public Inquiries and Reporting
- Technology Considerations
- Change Impact Activity
- Business Process Workshop Next Steps

FI\$Cal Project Overview

- The Financial Information System for California (FI\$Cal) is a business transformation project for the State in the areas of budgeting, accounting, procurement, and cash management. The Project prepares the State to work in an integrated financial management system.

- California's Partner Agencies are working together to form the partnership to support FI\$Cal at the highest level:
 - Department of Finance (DOF)
 - Department of General Services (DGS)
 - State Controller's Office (SCO)
 - State Treasurer's Office (STO)

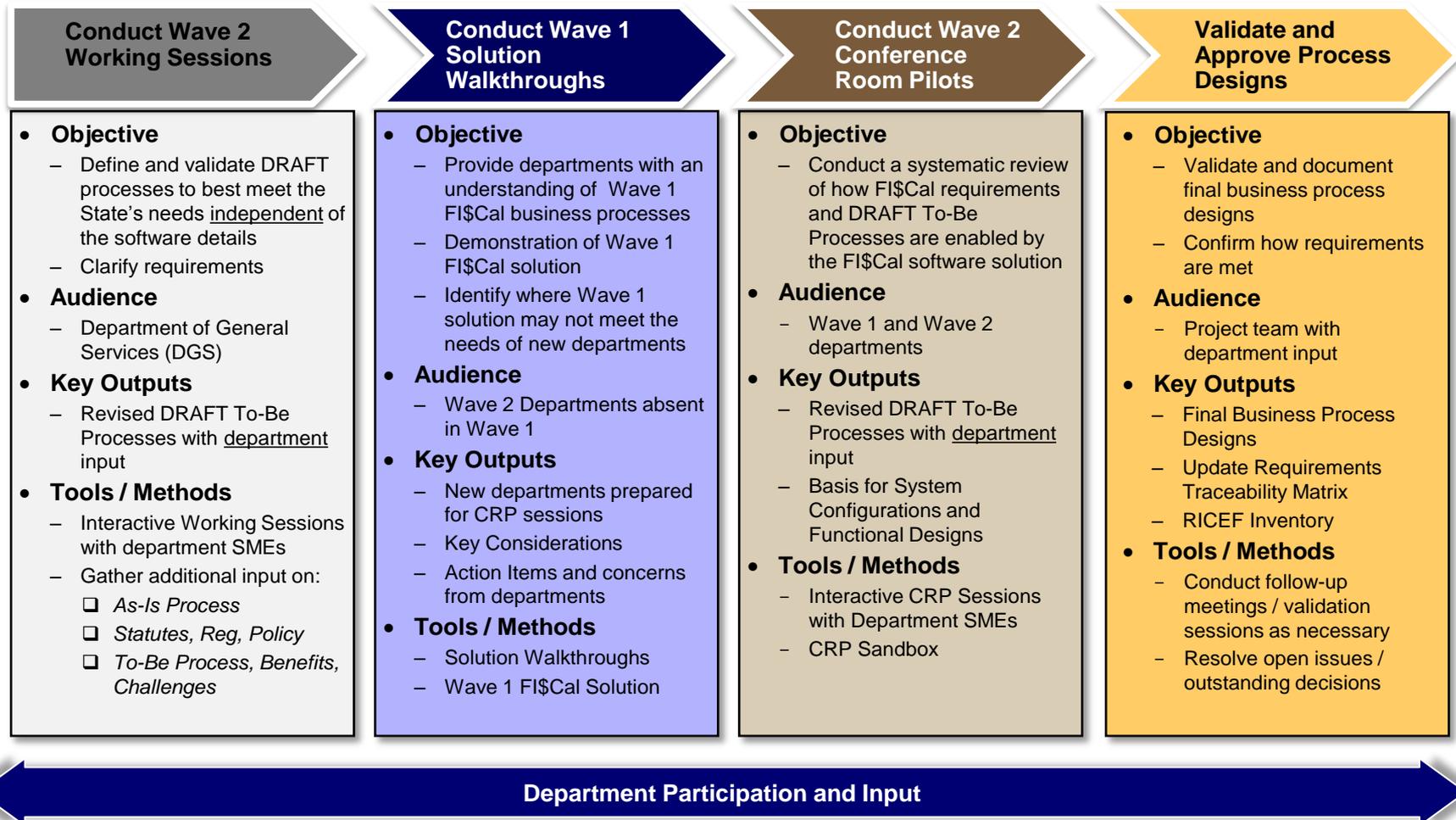
FI\$Cal Wave Timeline



BPW Objectives

- The Business Process Workshops will provide:
 - An overview of the business process, including key terms and functionality being implemented
 - A list of changes with the “To-Be” business process
 - An opportunity to discuss and begin identifying department-specific changes and impacts
 - An explanation of Wave 2 end-user roles
 - A template to capture department-specific changes and impacts
 - An opportunity to begin thinking about updates to internal department processes

FI\$Cal Design Approach



What Comes Next?

- **Role Mapping Working Session** – Workshop to review the FI\$Cal Role Mapping Template, answer any questions about the roles presented in BPWs, and begin assigning end-user roles for Wave 2.
- **Change Workshop** – Workshop to help prepare managers and supervisors for conversations with department end users on the new FI\$Cal business processes and their FI\$Cal end-user roles
- **End-User Training** – Training for department end users that will need to use the System in their assigned FI\$Cal end-user roles



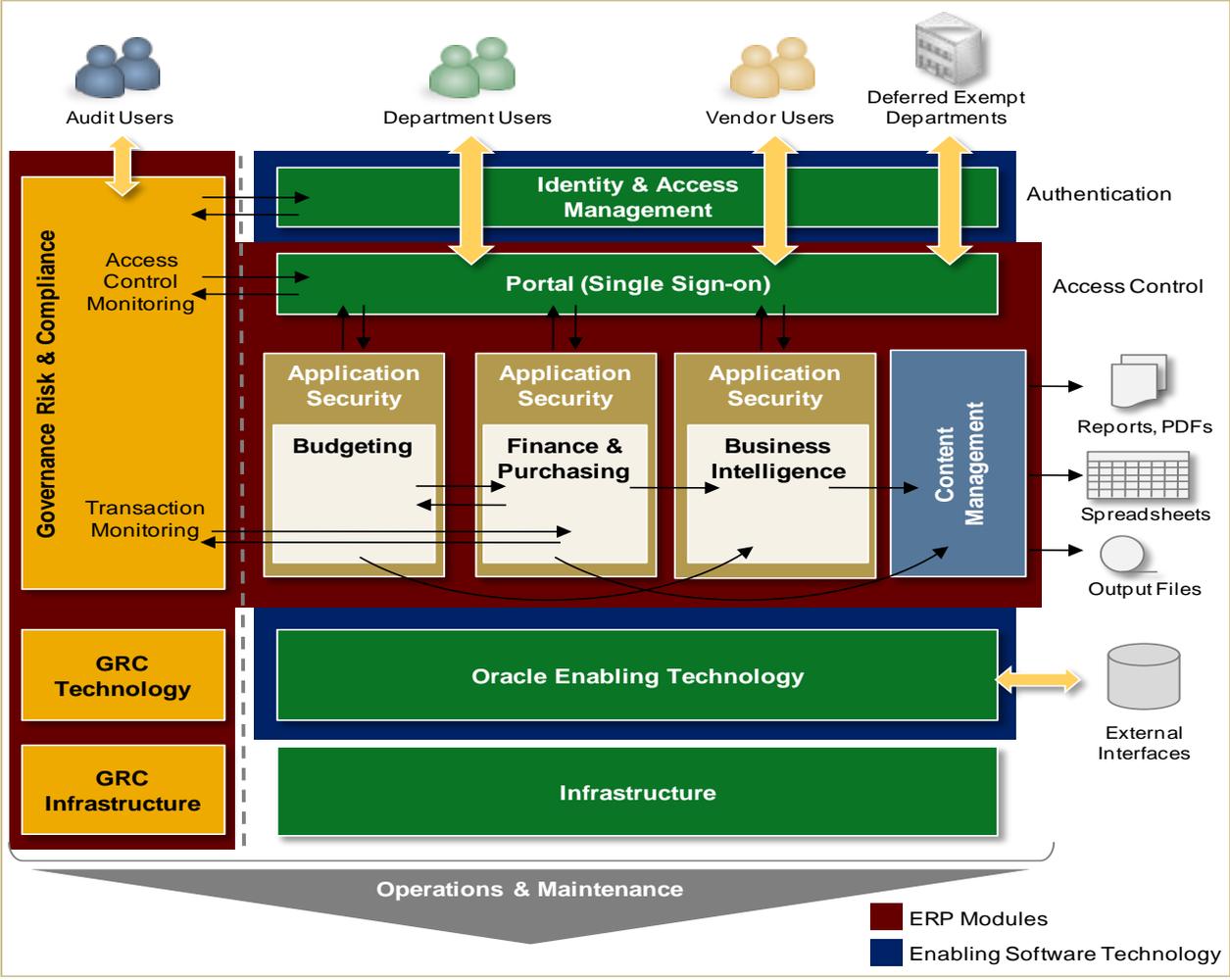
Ground Rules & Guiding Principles

- **Challenge** how the State does things today
- **Perspective** – Adopt a “Statewide” perspective
- **Silence is Consent** – Speak and share your thoughts
- **There are no Bad Questions** – Better to question, than assume
- **Consider Best Practices** and business process changes
- **Think of the data** and information you require

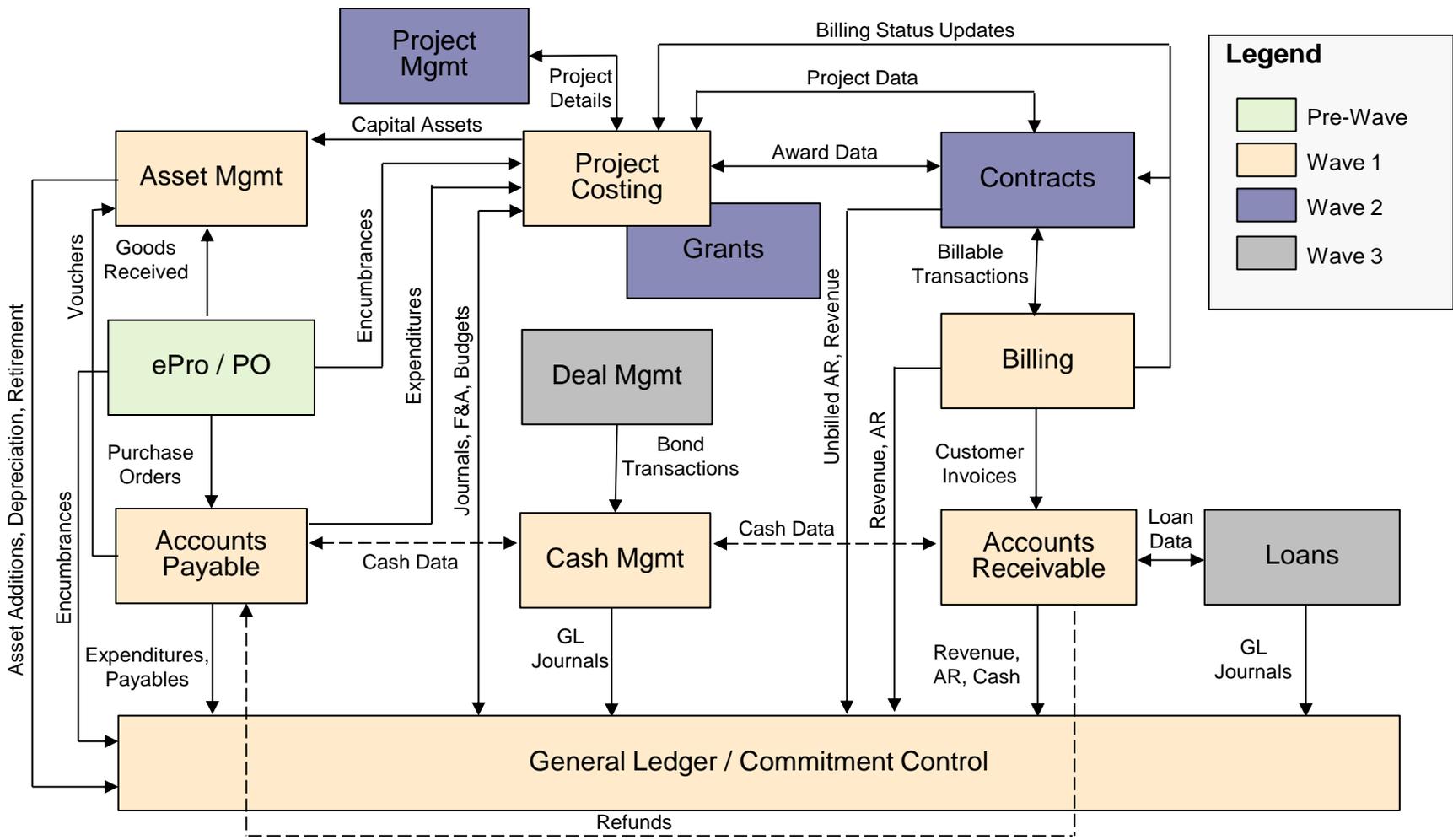
What You Should Take Away

- Process overview level understanding of the Wave 2 FI\$Cal business processes. For this session, the business processes are:
 - Set Up SB/DVBE Certification
 - Apply for SB/DVBE Certification: 2 Step Process
 - Record SB/DVBE Information
 - DGS SB/DVBE Certification Inquires and Reporting
- BPW Change Impact Tool for your department used to identify and manage department-specific impacts
- Understanding of the FI\$Cal end-user roles for participation in the Wave 2 Role Mapping Facilitation Session

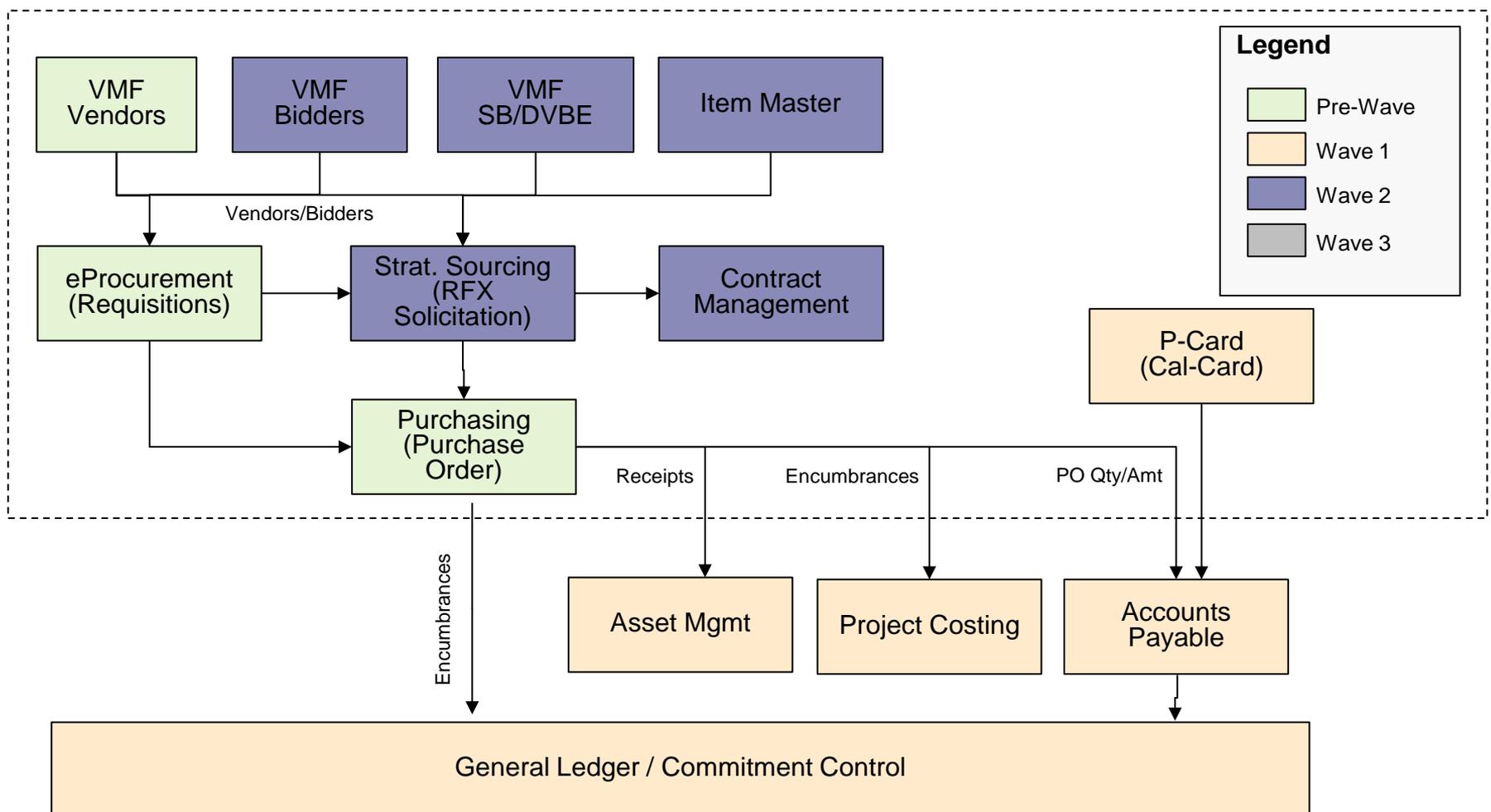
FI\$Cal Solution Overview



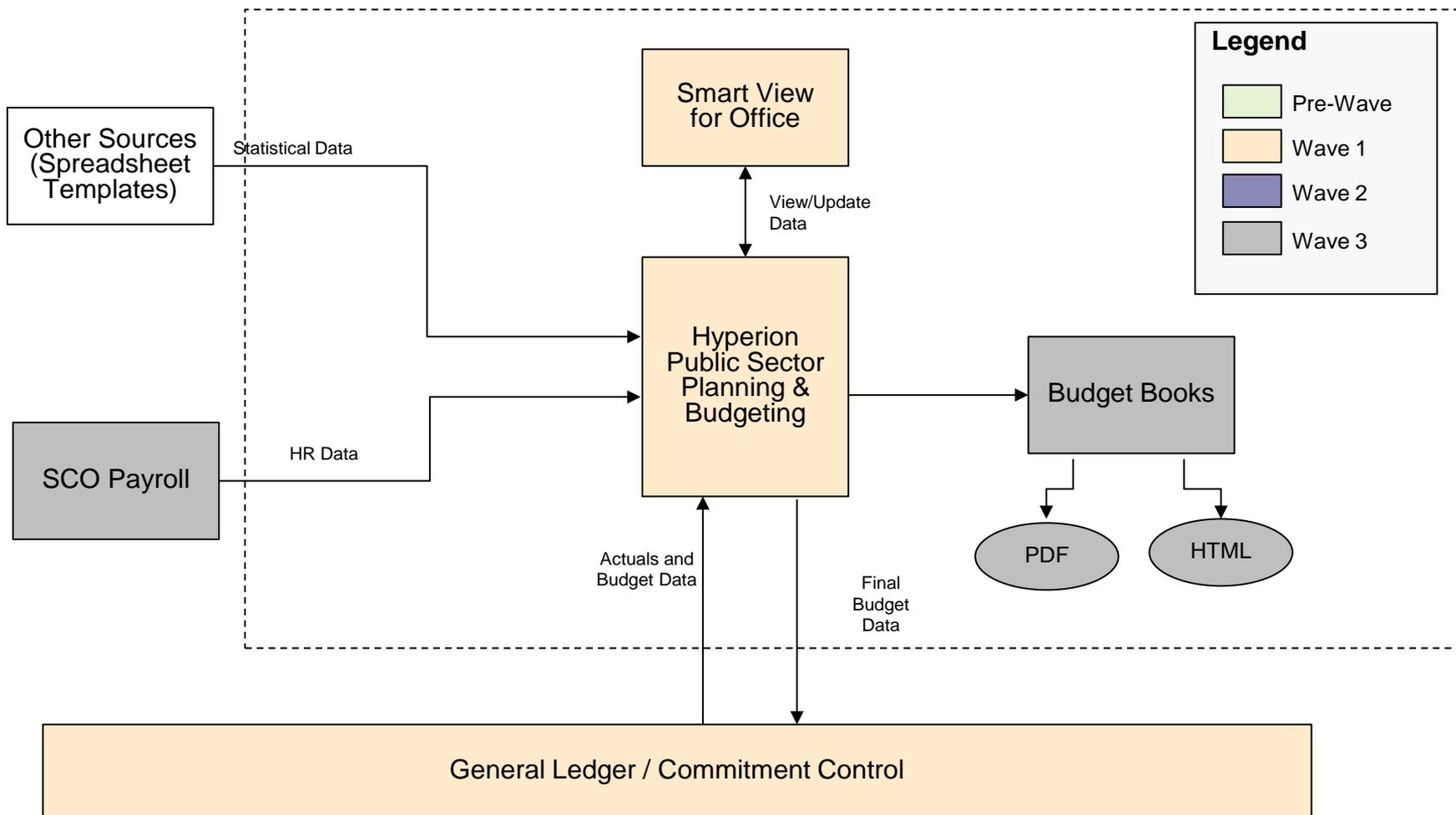
FI\$Cal Accounting Solution



FI\$Cal Procurement Solution



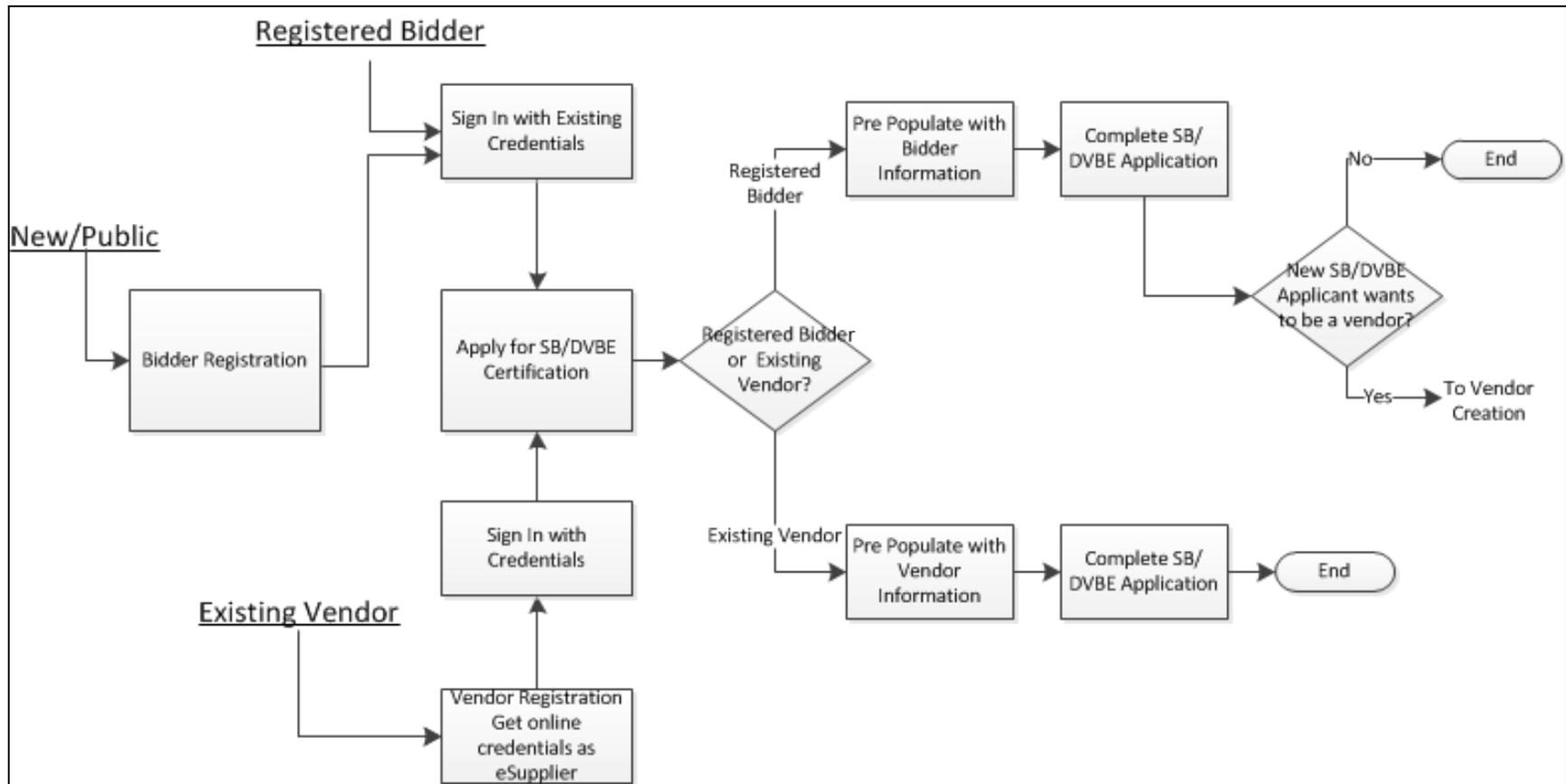
FI\$Cal Budgeting Solution



SB/DVBE Certification Overview

- SB/DVBE certification will be managed in FI\$Cal
- Applicants need to obtain online credentials by registering as a bidder/eSupplier (if they are not yet registered) before applying for SB/DVBE certification
- Online SB/DVBE application will be accessed through the FI\$Cal Enhanced Procurement Portal
- Electronic approvals and notifications will be provided using FI\$Cal's workflow framework
- DGS Certification Officers will have the ability to review and approve certification applications
- Reports will be available for the following:
 - Administrative reporting to show certification metrics
 - SB/DVBE contracting activity

FI\$Cal SB/DVBE Application Flow



SB/DVBE Application Flow Notes

- New applicants go through Supplier/Bidder registration as the first step prior to applying for certification
- The system will pre-populate SB/DVBE application with the applicant's existing data (bidder or vendor data)
- One set of credentials (user id/password) will be used for SB/DVBE, Bidder or eSupplier access
- SB/DVBE certified firms that do not want to do procurement with the state will mark a flag to opt out of unwanted solicitations

What is included in Wave 2

- Application
 - SB/DVBE online application accessed through the PeopleSoft Enhanced Procurement Portal
 - Quick Entry for state staff entering paper submissions on behalf of applicants
 - Comments and file attachment functionality provided

- Workflow Routing and Approvals
 - Electronic workflow approval process and email notifications to approvers and applicants
 - Auto approval based on configured criteria

- Evaluation & Review
 - Designated state staff to review application processed in-house

What is included in Wave 2

- Inquiry and Reporting
 - Public search for certified vendors from the FI\$Cal portal
 - Enhanced reporting capabilities

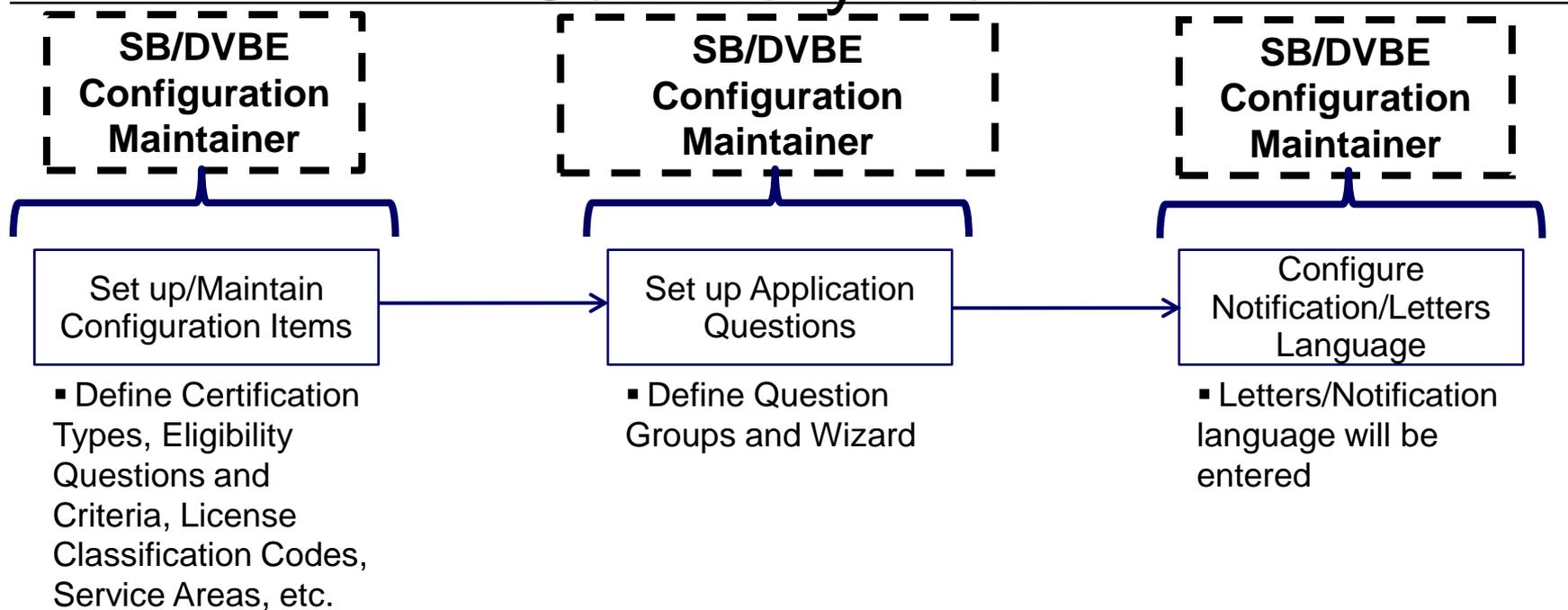
- Maintenance and Administration
 - SB/DVBE configuration maintained internally by the state
 - SB/DVBE database table to store certification information
 - SB/DVBE application access based on role security

SB/DVBE Certification Key Terms

Term	Definition
Bidder	Individual or business registered in FI\$Cal and eligible to place a bid on an event
Vendor	Suppliers/payees actively doing business with the state (issued POs/Contracts, payments)
Bidder Registration	Registering in FI\$Cal to get online credentials and allow online response to bids; Needed prior to applying for certification
OSDS Certification	Applying for certification (SB, DVBE, Non Profit, NVSA) in FI\$Cal

Configure SB/DVBE Certification

Summary Flow



Key Impacts

- Application Questions can be established/changed as needed by internal DGS-OSDS designated staff
- Approval thresholds are entered and may be modified as new thresholds are set
- Notification templates are available to enter or change language of the letters

Configuration: Set up Certification Types

Certification Types Definition

Certification Type Information
Find | View All First 1 of 1 Last

Certification Type :
Status : | + -

Business Type Details

Business Type

+ -

+ -

Key Points:

- Set up certification types and Business Type Details

Configuration: Set up Eligibility Questions

Eligibility Questions

Group ID: Eligibility Set 1
Certification Type: Small Business
Description: Eligibility Questions for SB

Questions	Required	Expected Answer		
Domiciled in California?	<input checked="" type="checkbox"/>	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>	+ -
Is the applicant's Office located in US?	<input checked="" type="checkbox"/>	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>	+ -
A veteran of the U.S. military, naval or air service?	<input checked="" type="checkbox"/>	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>	+ -

Key Points:

- Set eligibility questions for each certification type.
- Store eligibility questions, expected answers & required check for every question.

Configuration: Define Eligibility Criteria

Eligibility Criteria per Certification Type

Certification Eligibility Details

Certification Type

No. of Matched Answers

















Key Points:

- Set the eligibility criteria for each certification type - the number of correctly matched answers.
- The number of matched answers will be used to pass the eligibility test for a certification type.

Configuration: Define Question Groups

Questions Group

Question Group: Affiliate Relationship
Certification Type: Small Business
Description: Affiliate Relationship Questions

Questions

Questions	Required
Have a controlling ownership in another business?	<input checked="" type="checkbox"/>
Share or have common owners with another business?	<input checked="" type="checkbox"/>
Share or have common management with another business?	<input checked="" type="checkbox"/>

Key Points:

- Set up Question Groups that will occur in different stages of the certification process.
- This page will be used for defining individual questions under a Question Group

Configuration: Certification Process as Wizard

Wizard

Certification Type : Small Business

Description : Certification process flow for Small Business

Status: Active

Question Groups Sequence

Page No.	Display Sequence	Display Type	Group ID/Page	Description
<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="Eligibility"/>	<input type="text" value="Eligibility Set 1"/>	Eligibility Questions for SB <input type="button" value="+"/> <input type="button" value="-"/>
<input type="text" value="2"/>	<input type="text" value="0"/>	<input type="text" value="Page"/>	<input type="text" value="Agreement"/>	Terms and conditions acceptance <input type="button" value="+"/> <input type="button" value="-"/>
<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="Questions"/>	<input type="text" value="Affiliate Relationship"/>	Affiliate relationship Questions <input type="button" value="+"/> <input type="button" value="-"/>

Key Points:

- Set the sequence of pages and content to be populated for a certification type.
- The page is used to set up the process cycle for every certification type using Page No., Display Sequence, Display Type, and Group ID. The Name of the page will be Wizard.

Configuration: Certification Page Details

Page Details

Pages

Page ID	Description
ZZ_TEST_PG	Page for configuring Binds + -

Key Points:

- Define the set of certification pages with their actual name and description that will be populated in the Page prompt field of the Wizard page

Configuration: License Classification Codes

License Classification Codes

Certification Type : Small Business

License Code Details

Classification Code	Description	
C-02	Insulation and Acoustical	+ -
C-04	Boiler, Hot Water, Steam Fitting	+ -

Key Points:

- Define License Classification Codes and description.
- These codes will appear in the prompt of the License Classification field of the Other details page

Configuration: Define Service Areas

Service Areas

Certification Type: Small Business

Service Area Details

Country	State	County	City
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Key Points:

- Define Service Areas of the Other Details page.
- The page will contain four fields: Country, State, County and City in a grid for defining the combinations.

Configuration: Define Data of Gross Annual Receipts Table

Gross Annual Receipts Table Data

Table Data

If your firm ownership type is a:	Your gross annual receipts and allowances are located on:	
SOLE PROPRIETORSHIP	SCHEDULE C(form1040),SECTION A, LINE 3	+ -
S-CORPORATION(all other business types)	FORM 1120S, LINE 1C	+ -
C-CORPORATION	FORM 1120 OR 1120A, LINE 1C	+ -

Key Points:

- Specify the data of the Gross Annual Receipts Table Data
- The page will have 2 columns in a grid:
 - a) If your firm ownership type is a:
 - b) Your gross annual receipts less returns & allowances are located on:

Configuration: Ownership Types (Used on the Business Page)

Define Ownership Types

Ownership Types

Ownership Type

Sole Proprietorship	+ -
Partnership	+ -
Corporation	+ -
Joint Venture	+ -

Key Points:

- Define the Ownership types that will be populated on the Business page

Configuration: Define Agencies that User is Certified

Define Agencies

Agency Details

Agency

Metropolitan Water District	+ -
	+ -
	+ -
	+ -

Key Points:

- Define various agencies that will be populated on the Others Page.
- The values of this field will be used for selecting agencies for which a bidder or vendor is also certified.

SB/DVBE Certification – Department Roles

FI\$Cal End-User Role	Responsibilities
SB/DVBE User	External user that has obtained certification and online credentials to maintain/inquire on their own SB/DVBE file
DGS SB/DVBE Cert Approver	DGS user that approves SB/DVBE certification application
DGS SB/DVBE Cert Ad Hoc Approver	DGS user that approves SB/DVBE certification application when added to the approvals
DGS SB/DVBE Cert Officer	DGS user that has access to review and approve certification applications
SB/DVBE Certification Configurator	DGS user that maintains SB/DVBE configuration information in the system, e.g., Application Questions, Approval Thresholds, Notification verbiage

SB/DVBE Certification – Department Roles

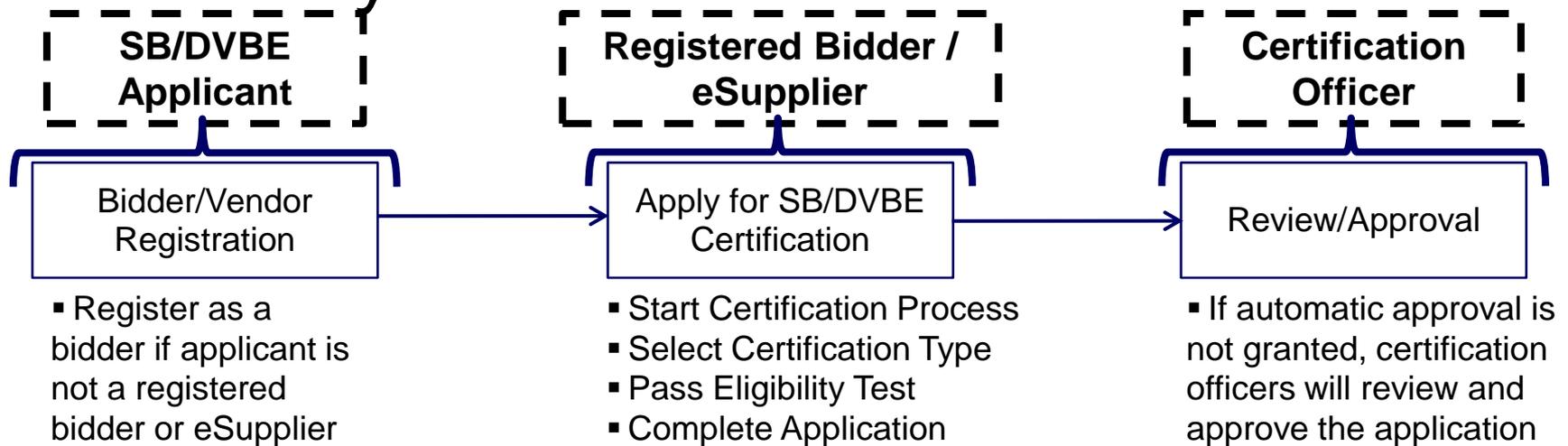
FI\$Cal End-User Role	Responsibilities
DGS SB/DVBE Reporter	Department user that can run SB/DVBE reports statewide

Apply for SB/DVBE Certification Overview

- Two Part Process
 - Bidder Registration – allows supplier to obtain log in credentials to participate in bidding
 - Apply for SB/DVBE Certification – obtain certification

Apply for SB/DVBE Certification

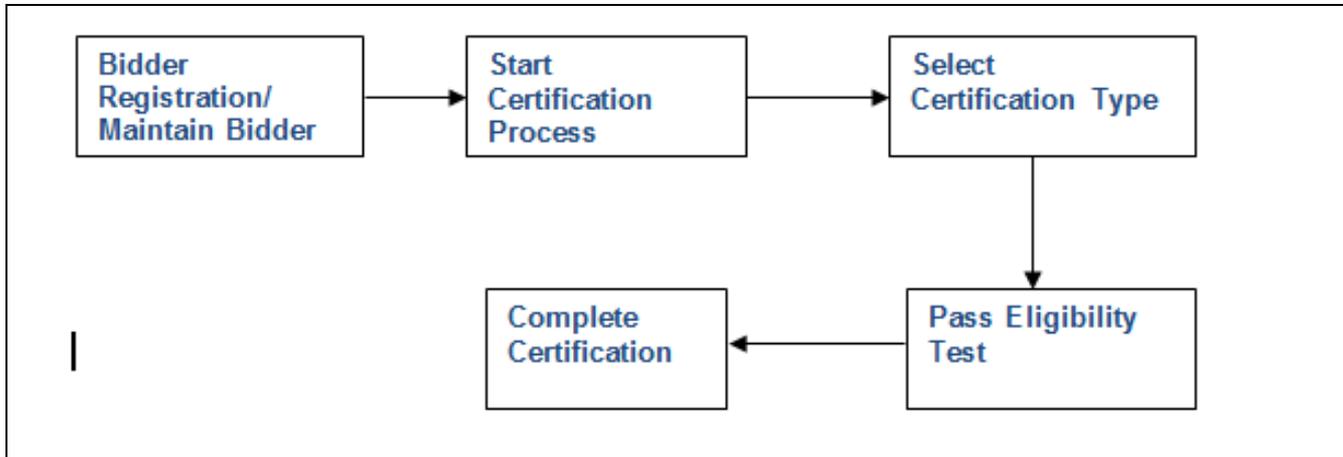
Summary Flow



Key Impacts

- Online credentials needed to apply for certification, through bidder or eSupplier registration
- Application for certification is online, although paper applications are accepted
- If automatic approval is not granted, certification officers will access the application in FI\$Cal to review and approve

Illustration: Application Flow After Bidder Registration



Key Points:

- Applicant applying for certification after bidder registration

Illustration: Bidder Registration Step 1

Bidder Registration

Step 1 of 8: Preliminary information.

These questions will determine the type of bidder you will become.

*Tax Identification Number

*** Required Field**

1. Please select the type of bidder which best describes you.

Business
 Individual

2. What type of bidding activities are you interested in?

Buying goods/Services
 Selling goods/Services
 Both

*** Required Field**

Key Points:

- The TIN (Tax Identification Number) field will be moved to Step 1 and removed from Step 6 of the Bidder registration process:

Illustration: Bidder Registration Step 2

Bidder Registration
Step 2 of 7: User Account Setup

Create a user account for your company. Optionally, you may provide your instant messaging account information for real-time communication with others using this system. Also you may provide your locale specific information.

* Required Field

URL:

User Information

*First Name:

*Last Name:

*Email ID:

*Telephone: Ext:

Fax:

*User ID: (User's account login name.)

Other Contact Info (Optional)

Instant Messaging (IM) Information

IM Service:

IM User Name:

Personalization Information

Language:

Time Zone:

Currency Code:

<< Back Next >> Cancel Registration

* Required Field

Key Points:

- Bidder Registration Step 2 – User Information

Time Zone should be defaulted to PST

Currency Code should defaulted to USD

Illustration: Bidder Registration Step 3

Bidder Registration
Step 3 of 8: Primary Address

Please provide a Primary Address for your company. If your company has multiple site locations, the Primary Address would be the main headquarters.

* Required Field

Primary Address

Country:

*Address 1:

Address 2:

Address 3:

*City:

County: Postal:

*State:

<< Back Next >> Cancel Registration

* Required Field

Key Points:

- Bidder Registration Step 3 – Address Information

Illustration: Bidder Registration Step 4

Bidder Registration
Step 4 of 8: Other Account Addresses

* Required Field

The Primary Address you have entered for ABC Corporation is:
100 Universal City Plaza
Universal City, California 91608, United States

If you need to make corrections, click the Back button and edit your fields.

Other Account Addresses

Because you will be bidding on events as a seller of goods/services, you must provide an Invoice address.

Check boxes below to indicate addresses that are different from your Primary Address:

Invoice Address your company's accounts receivable department (for when you sell goods/services).

<< Back Next >> Cancel Registration

* Required Field

- Key Points:**
- Bidder Registration Step 4 – Additional Address Information

Illustration: Bidder Registration Step 5

Bidder Registration

Step 5 of 8: Address Contacts

Please enter additional addresses as necessary. (This is required only if your Primary Address is not used for all address types.) Next, please designate each of your registered users to an appropriate address category. If you're not sure which address category is the best match, choose "Primary Address".

* Required Field

Company Contacts	
Personalize Find  	
First  1 of 1  Last	
User Name	Designate as Contact for
Jon Tugade	<input type="text" value="Primary Address"/>

<< Back

Next >>

Cancel Registration

* Required Field

Key Points:

- Bidder Registration Step 5 – Contact Information

Illustration: Bidder Registration Step 5a

Other Business Details

Company Primary Industry:

Keywords help us find bids that are best match for your company.
Please enter at least 3 keywords that define your products/services .

Keywords:

Selected Keywords	
<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>

Where do you do business?

USA + Canada
 USA
 California Only
 Specific States/Provinces

Do you require notifications to be sent to your email id?

Yes
 No

Key Points:

- New custom page added to bidder registration

Illustration: Bidder Registration Step 6

Step 6 of 8: Additional Classification Information

Please fill out the following information. This information allows us to more accurately tailor the Sourcing process with your business.

* Required Field

Standard ID Numbers		Personalize ?	First
Identification Type	ID Number		
1 *Tax Identification Number	222222222		

SIC Codes - US - NAICS Codes		Personalize Find ? ?	First	1 of 1	Last
Standard Industry Code	Description				
54193	Translation and Interpretation Services	Delete			

Add Row

1. When were you incorporated? [?](#)

2. What is your annual revenue?

VAT Information				Personalize ?	First
Country	Description	VAT ID	Home Country		
1 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	Delete	

Add Row

More About Your Organization (Optional)

HUBZone Program:

Size of Small Business:

Veteran-Owned Small Business:

Women-Owned Business

Emerging Small Business

Sm Disadvantaged Business Prog:

Other Preference Programs:

Veteran Disabled

Key Points:

- The Tax Identification Number fields will be moved to Step 1

Illustration: Bidder Registration Step 7

Bidder Registration

Step 7 of 8: Categorization Information

You have the option to select one or more categories that best describe your organization's bidding interests. Selecting specific categories may qualify you to receive notifications for future events that match your interests. There is no obligation to check any boxes, but doing so could result in more invitations to bid on events. By selecting no categories, you remain eligible to participate in all public events posted on this website.

* Required Field

For best performance, please pause briefly after checking each selection box.

Check all Uncheck all

Strategic Sourcing Tree

- Sell Categories
 - CAMPING - Camping Equipment
 - CYCLING - Cycling Equipment
 - OFFICE_SUPPLIES - Office Supplies
 - HIKING - Hiking Equipment
 - FISHING - Fishing Equipment
 - CLIMBING - Climbing Equipment
 - MISC - Miscellaneous
 - PROMO ITEMS - Promotional Items
 - SUPPLIES - Supplies
 - SERVICES - Services
 - SERVERS - Servers
 - PRINTERS - Printers
 - MULTIMEDIA - MultiMedia
 - HARDWARE - Computer Hardware
 - ACCESSORIES - Accessories

Key Points:

- Bidder Registration Step 7 – Classification Information (Will use UNSPSC Codes)

Illustration: Bidder Registration Step 8

Bidder Registration

Step 8 of 8: Terms and Conditions

Make sure you read the terms and conditions fully before continuing.

* Required Field

[Start SB/DVBE Certification Application](#)

I agree to be bound by the following Terms and Conditions:

1. The services provided through this Website and the use of the Website are governed by these Terms and Conditions. By accessing or using the services or the website or by registering as either a buyer or a seller, you agree that (1) you have read and familiarized yourself with the Terms and Conditions, (2) you understand the Terms and Conditions, and (3) you are bound by the Terms and Conditions in your use of the services or the Website. The Terms and Conditions, together with any additional terms and conditions specific to a particular event, constitute the entire agreement and supersede and replace any and all prior agreements between the parties regarding such subject matter.

2. Registration and Eligibility. The services and the website are only available to persons with the legal capacity to enter into this agreement. This organization may, at its sole and absolute discretion, refuse to accept a person's (or entity's) registration and may at any time after

<< Back Finish Cancel Registration

* Required Field

Key Points:

- A link is provided for bidders that would like to apply for certification immediately after bidder registration

Illustration: Bidder Registration Message at Completion

Bidder Registration

Bidder registration for LadVikas was successful.
Choose the desired user from the grid below and signin to Strategic Sourcing.

Personalize Find [grid icon] First 1 of 1 Last	
1 Vikas Lad	Sign In

This text box should be configurable

- Key Points:**
- This is the acknowledgement message after successful completion of the bidder registration process

Apply for SB/DVBE Certification

Select Certification & Business types

Certification ID:

Certification Types

Small Business (SB)

Disabled Veteran Business Enterprise (DVBE)

Non-Profit Veteran Service Agency (NVSA)

Non-Profit (NP)

Business Types

Construction

Service

Manufacturer

Non- Manufacturer

[Next](#)

Key Points:

- Specify Certification Type applied for and Business Type

Apply for SB/DVBE Certification – Eligibility Questions

Eligibility Questions

Certification ID:

Certification Type: **Small Business (SB)**

Small Business (SB) Eligibility Questions

1. Is the applicant firm independently owned and operated? Yes No
2. Is the applicant firm dominant in its field of operation? Yes No
3. Is the applicant firm's principal office located in California? Yes No
4. Are the applicant firm's owners domiciled in California? Yes No

Previous

Next

Key Points:

- Enter eligibility information

Apply for SB/DVBE Certification – Terms and Conditions

Participation Authorization and Compliance Agreement

Certification ID:

Certification Type: Small Business (SB)

BY ACCEPTING THE FOLLOWING TERMS AND CONDITIONS, YOU ARE AGREEING TO THE FOLLOWING:

PENALTY OF PERJURY
Any person that willfully provides false information is subject to serious penalties. The submittal of this online application must be authorized by the applicant firm's owner (or officer, in the case of a corporation) and hereby certifies that he/she has read and understands that the applicant meets the applicable Small Business and/or DVBE certification requirements under Government Code Section 14835 et seq, and/or Military and Veterans Code Section 999 et seq, and California Code of Regulations, Title 2, Section 1896 et seq, and that the foregoing statement and all information submitted herein are truthful and accurate. I declare under penalty of perjury under the laws of the state of California that the foregoing is true and correct.

VERIFICATION OR RE-VERIFICATION OF STATUS
All applicants are subject to verification or re-verification of status at any time. Failure by a business to provide requested information that supports its eligibility, by the date and time specified by the OSDS, shall be grounds for denial or decertification. Please also note that sanctions may be imposed for certification program misuse. (See Title 2, California Code of Regulations, Sections 1896.14, 1896.16 and 1896.70. See also Government Code, Sections 14842 and 14842.5; and Military and Veterans Code, Section 999.9; available at www.leginfo.ca.gov.)

USE POLICY
The State wants you know about the collection, use, security, and access to information that may be obtained through use of the State's web portal. By visiting this web site, you are accepting the policies and practices described in this Notice. Please note that this Use Policy is subject to change without notice, and that it reflects the State's current business practices. This policy is dated December 7, 2000. Also note that each department within the State may have additional privacy and use policies specific to the mission and needs of their work. Be sure to review those policies as you access additional sites within the State.

PERSONAL INFORMATION AND CHOICE
"Personal information" is information about a natural person that identifies or describes an individual, including, but not limited to, his or her name, social security number, physical description, home address, home telephone number, education, financial matters, and medical or employment history, readily identifiable to that specific individual. A domain name or Internet Protocol address is not considered personal information, however, it is considered "electronically collected personal information".

I accept the terms above

Key Points:

- Accept Terms and Conditions

Apply for SB/DVBE Certification – Registration Details

To Navigate click on the appropriate section

Registration Details

Certification ID:
 Certification Type: Small Business (SB)

Business Types

Construction
 Service
 Non-Manufacturer
 Manufacturer

Registration Data

TIN: (If you don't have a FEIN, specify the SSN)

DUNS:

Legal Business Name:

Doing Business As (DBA) Name:

Business Phone Number 1:

Business Phone Number 2:

Business Fax Number:

Business Web Address:

Share Data: I approve the sharing of my certification information with other government and local agencies for the purpose of participating in their business certification programs.
 Yes No

Key Points:

- Enter Business Type and Registration Data

Apply for SB/DVBE Certification – Registration Details (cont.)

Contact Information	
First Name:	<input type="text" value="Robert"/>
Last Name:	<input type="text" value="Cross"/>
Email Address:	<input type="text" value="rmicross@cot.net"/>
Phone:	<input type="text" value="(530)667-5616"/> ext. <input type="text"/>
FAX:	<input type="text"/> (optional)

Mailing Address	Principal Address
Street or PO Box: <input type="text"/>	Street: <input type="text"/> <input type="checkbox"/> Same as Mailing Address
Country: <input type="text"/>	Country: <input type="text"/>
State: <input type="text"/>	State: <input type="text"/>
City: <input type="text"/>	City: <input type="text"/>
Zip Code: <input type="text"/> - <input type="text"/>	Zip Code: <input type="text"/> - <input type="text"/>

Key Points:

- Enter contact info and Mailing Address

Apply for SB/DVBE Certification – Owner Information

To Navigate click on the appropriate section

Add Owner Information

[Registration](#) | [Business](#) | [Owners](#) | [Affiliates](#) | [Taxes](#) | [Other](#)

Certification ID:
 Certification Type: Small Business (SB)

[Add Owner](#)

Ownership Information

LAST NAME	FIRST NAME	TITLE	PERCENT	EDIT	DELETE
CROSS	ROBERT	OWNER	100%	edit	delete
			100%		

Ownership interest must total 100%.
 Sole Proprietorship must only have one owner.

[Previous](#) [Next](#)

Key Points:

- Enter Owner Information

Apply for SB/DVBE Certification – Add Owner Page

Owner Information

First Name:

Last Name:

Title: Owner

Ownership Percent:

Owner Type:

Home Address

Street :

Country:

State:

City:

Zip Code: -

Key Points:

- Enter Owner Information

Apply for SB/DVBE Certification – Tax Page

To Navigate click on the appropriate section

[Registration](#) | [Business](#) | [Owners](#) | [Affiliates](#) | [Taxes](#) | [Other](#)

Certification ID:
Certification Type: Small Business (SB)

Tax Information

GROSS ANNUAL RECEIPTS TABLE

Use this table to locate the gross annual receipts on a federal tax return as required below

<p>If your firm ownership type is a:</p> <p>SOLE PROPRIETORSHIP</p> <p>PARTNERSHIP OR S-CORPORATION (RENTAL OR LEASING BUSINESS)</p> <p>PARTNERSHIP (ALL OTHER BUSINESS TYPES)</p> <p>S-CORPORATION (all other business types)</p> <p>C-CORPORATION</p> <p>LIMITED LIABILITY COMPANY - SINGLE MEMBER/manager</p> <p>LIMITED LIABILITY COMPANY - MULTIPLE MEMBERS/managers WITH PARTNERSHIP</p> <p>LIMITED LIABILITY COMPANY - MULTIPLE MEMBERS/managers WITH S-CORP TAX S</p> <p>LIMITED LIABILITY COMPANY - MULTIPLE MEMBERS/managers WITH C-CORP TAX S</p> <p>LIMITED LIABILITY PARTNERSHIP</p>	<p>Your gross annual receipts less returns & allowances</p> <p>SCHEDULE C (form 1040), SECTION A, LINE 3</p> <p>FORM 8825, TOTAL OF LINE 3 COMBINED</p> <p>FORM 1065, LINE 1C</p> <p>FORM 1120S, LINE 1C</p> <p>FORM 1120 OR 1120A, LINE 1C</p> <p>FORM 1040, SCHEDULE C, LINE 3 or FORM 1120 or 1120A, Line 1c</p> <p>FORM 1065, LINE 1C</p> <p>FORM 1120S, LINE 1C</p> <p>FORM 1120 or 1120A, LINE 1C</p> <p>FORM 1065, LINE 1C</p>
--	--

Enter the Gross Annual Receipts (GARs) for the applicant as reported on the business' Federal income tax return. You may enter an estimate for the most recent tax year only if your tax returns have not yet been filed.

[View tax Information From Previous Application](#)

GARS Details

OWNER	CURRENT GARS OPTION	2013 GARS	2012 GARS	2011 GARS	TOTAL	AVERAGE
ROBERT BRIAN CROSS	2013 GARS Not Available	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	\$0.00	<input type="text" value="\$0.00"/>
Totals:					\$0.00	\$0.00

Tax Related Attachments

File Name	Description	User	Name	Date/Time Stamp
Abc.txt	<input type="text" value="Test File"/>	RClark	Robert Clark	#####

Key Points:

- Enter Gross Annual Receipt Information

Apply for SB/DVBE Certification

SB/DVBE Certification

Question Groups

First 1 of 8

CERTIFICATION TYPES

Previous

Next

Group Instructions:

Select appropriate Certification Type for your Business

Questions

Small Business (SB)

DVBE

Previous

Next

* Required

Wizard Execute - Document Creation

Question

*Navigational Question

Save for Later

Key Points:

- Certification type questions

Certification Application: Business Page Tab (SB)

To Navigate click on the appropriate section

Business Registration Business Owners Affiliates Taxes Other

Certification ID:
Certification: **Small Business**

Owner Information

Ownership Type: **California Secretary of State's Corporation Number:**

Date Business Started: **California Secretary of State's LLC Number:**

Tax Year Beginning Month:

Did Applicant's Business structure change within Yes No

Workforce

Enter the applicant firm's average no. of employees for the last four quarters, including all employees that are in California, or if you have been in business for less than a year, enter the no. of employees averaged over the no. of quarters that you were in

No. of Employees:

All small business applicants must answer each of the following questions to identify potential affiliate businesses.

Affiliate Relationships

During any one (or all) of the previous three tax years, did the applicant or its individual owners/officers:

- 1) Have a controlling ownership interest in other business? Yes No
- 2) Share or have common owners with another business? Yes No
- 3) Share or have common management with another business? Yes No
- 4) Share facilities, equipments or systems with another business? Yes No
- 5) Share employees with another business? Yes No

Please click on the appropriate Yes or No answer to the following questions regarding Small Business eligibility.

Small Business Definition Questions

- 1) Is the applicant firm dominant in its field of operation? Yes No
- 2) Is the applicant firm independently owned & operated? Yes No

Key Points:

- Business Page Tab for Small Business Application

Certification Application: Other Tab (SB)

Other Detail

Registration Business Owners Activities Taxes Other

Certification ID:
 Certification Type: Small Business

Various Data

Agreement with whom you are at: Please Select: [dropdown]
 Certification number with the above agreement: [dropdown]
 Do you have a bid pending within the next 90 business days?
 Yes No

CA Contractors License Information

CA Contractor License: [dropdown] [Update Rights and as follows]
 License Classification: C-85-Corporate [dropdown] [Add]
 C-85-Corporate [dropdown]
 C-85-Corporate [dropdown]

Specify the Service Area details in the following section:

County: [dropdown] [Find] [View all] [Print] [List]

State: [dropdown] [Find] [View all] [Print] [List]

County: [dropdown] [Find] [View all] [Print] [List]

City: [dropdown] [Find] [View all] [Print] [List]

Zipcode: [dropdown] [Find] [View all] [Print] [List]

USPS Classifications

US Classification: [dropdown] [Add] [Remove]
 251816 Product material transport [dropdown]
 781816 Road Cargo Transport [dropdown]

Enter the individual keywords (descriptive terms, separated by a space) which best describe your business and its offerings. Consider using terms that will help buyers and potential business partners locate your business when they use the State's Online Certified Small Business and DVBE search engine. Your keywords are limited to 255 characters. You can update your keywords at any time.

Keywords

GENERAL AVIATION PRIVATELY OWNED TRUCKS [dropdown]
 WITHOUT EMPLOYEE HEAVY CONSTRUCTION EQUIPMENT [dropdown]
 RENTAL LEASING [dropdown]

Answer the following questions as they apply to the applicant firm when fulfilling a contract or purchase order.

Commercially Useful Functions

1. When fulfilling your role as a State vendor or purchase order, will your firm provide services and/or products that are not available to the general public? Yes No [dropdown]
 2. When fulfilling your role as a State vendor or purchase order, will your firm directly perform, manage or supervise a portion of work? Yes No [dropdown]
 3. When fulfilling your role as a State vendor or purchase order, will your firm provide services and/or products that are not available to the general public? Yes No [dropdown]

[Previous] [Next]

Business Page(SB) Business Page(DVBE) Business Page(NP & NVSA) Other (SB)

Key Points:

- Other Tab for Small Business Application

Certification Application: Affiliate Tab

Affiliate Information

Business Name:

First Name:

Last Name:

Title:

Ownership Percent:

Business Start Date:

Relationship Start Date:

Relationship End Date:

Fiscal Year End:

Number of Employees:

Business Address

Street or PO Box:

Country:

State:

City:

Zip Code:

Key Points:

- Affiliate Page

Certification Application: Approval Tab

Approve Certification

Bidder ID: 000000003

Bidder Name: Robert Brian [View Certification Details](#)

Certification ID: 0000000213

Certification Type: Small Business(SB)

Comments:

Approve

Deny

Hold

[Return to Worklist](#)

Affiliate page (DVBE)
Add Affiliate Page
Approval Page
Attachments Page
Supplier Profile

Key Points:

- Approval Page

Certification Application: Attachment Tab

Attachments & Comments

Other Important Attachments

File Name	Description	User	Name	Date/Time Stamp
Abc.txt	<input type="text" value="Test File"/>	RClark	Robert Clark	9/3/2014

Comments:

VSA) / Other(NP) / Affiliate page (DVBE) / Add Affiliate Page / Approval Page / **Attachments Page** / Supplier Profile

Key Points:

- Comments and Attachments

Certification Application: Supplier Profile Tab

Supplier Profile

Supplier Name: **Supplier Number:**

Legal Business Name: **DBA Business Name:**

Address: **Phone:**

Email: **FAX:**

No. of Employees:

Business Types:

Service Areas:

Keywords:

Classifications:

Notification Preference:

View Options: [View Application](#) [View Change History](#) [View Application History](#) [View Mail Log](#) [View Notes](#)

Edit options: [Amend Application](#) [Renew Certification](#)

Active Certifications

Type	Application Date	Status	Status Date	From	To	Actions
SB(Micro)	#####	Approved	Mar 15, 2010	Mar 02, 2010	Mar 31, 2010	Cancel

Certification History

Type	Application Date	Status	Status Date	From	To	Actions
SB(Micro)	#####	Approved	Mar 15, 2010	Mar 02, 2010	Mar 31, 2010	Manage Cert.
SB(Micro)	#####	Expired	Apr 15, 2010	Mar 02, 2010	Mar 31, 2010	Manage Cert.

[Other\(NVSA\)](#) [Other\(NP\)](#) [Affiliate page \(DVBE\)](#) [Add Affiliate Page](#) [Approval Page](#) [Attach](#)

Key Points:

- Maintain Supplier Profile

Certification Application: Mail Log Tab

Mail Log

Notifications Log

Date/Time	Sender	Receipients	Subject	Status
Mar 15, 2010	Robert Brian	Clark Kent	Approval Mail	

(E) < Add Affiliate Page < Approval Page < Attachments Page < Supplier Profile < **View Mail Log** < View Notes | <

Key Points:

- View Mail Log

Certification Application: View Notes Tab

Notes

Add Note:

Notifications Log

Date/Time	Created By	Log
Mar 15, 2010	Robert Brian	Approval Letter SB notification sent
Mar 19, 2010	Todd Brown	Certification now in Pending status

Key Points:

- View Notes

Certification Application: Company Profile Tab

Company Profile

My Account

Company Name:	Small Business Consultants
Contacts:	Emily Van Atta
Address:	707 Third Street West Sacramento, CA 95605
Phones:	530-412-3456
Contact Emails:	ev_jane@yahoo.com

Log View Notes **Company Profile** Manage Cert. View Change history View Application History SB-DVBE Cor

Key Points:

- View Company Profile

Certification Application: Manage Certification Tab

Manage Certification

Certification Information

Supplier ID:	000000001	Certification Type:	Small Business (SB)	Last Audited:	Not Audited
Supplier:	Robert B Cranz	Certification Status:	Expired		

[Cert Status](#)
[Letters](#)
[Notes](#)
[Documents](#)

Certification Status

From: **To:**
Application Date:
Status: **Expired**
Assigned User:

Timers

Clock	Running Time	Action
Waiting for Agency	Not Running	Start
Deficiency	Not Running	Start
Compliance	Not Running	Start
GARS	Not Running	Start
QA	Not Running	Start

Changes History

Changes made on August 20, 2014 02:20:20 AM PDT

Page	Field	Previous	New	Action
Registration	BUSTYPES1	No	Yes	Changed
Registration	BUSTYPES2	Yes	No	Changed
Taxes	Previous GARS Total	\$164,260.00	\$300.00	Changed
Taxes	Previous GARS Average	\$54,752.33	\$100.00	Changed
Other	Classification A		A	Added

[View Mail Log](#)
[View Notes](#)
[Company Profile](#)
[Manage Cert.](#)
[View Change history](#)
[View Application H](#)

Key Points:

- Manage Certification

Certification Application: Change History Tab

Change History

Start Date: 

Changes

Changes made on August 20, 2014 02:20:20 AM PDT

Page	Field	Previous	New	Action
Registration	BUSTYPES 1	No	Yes	Changed
Registration	BUSTYPES 2	Yes	No	Changed
Taxes	Previous GARS Total	#####	\$300.00	Changed
Taxes	Previous GARS Average	\$54,753.33	\$100.00	Changed
Other	Classification A		A	Added

[New Notes](#) /
 [Company Profile](#) /
 [Manage Cert.](#) /
 [View Change history](#) /
 [View Application History](#) /
 [SB-DVBE Cont](#)

Key Points:

- View Change History

Certification Application: Application History Tab

Application History

History				
Supplier	Date	Status	Qualifications	View
Robert Cross	5-May-14	Pending Renew	SB	Application Change History
Robert Cross	30-Nov-09	Pending Renew	SB	Application Change History

Notes / Company Profile / Manage Cert. / View Change history / **View Application History** / SB-DVBE Contracting Page | 1

Key Points:

- View Application History

Certification Application: Business Page Tab (DVBE)

To Navigate click on the appropriate section

Business Registration **Business** Owners Affiliates Taxes Other

Certification ID:

Certification Type: **Disabled Veterans Business Enterprise**

Owner Information

Ownership Type: California Secretary of State's Corporation Number:

Date Business Started: California Secretary of State's LLC Number:

Tax Year Beginning Month:

Did Applicant's Business structure change within last year? Yes No

Workforce

Enter the applicant firm's average no. of employees for the last four quarters, including all employees that are in California, net-net. If you have been in business for less than a year, enter the no. of employees averaged over the no. of quarters that you were in business.

No. of Employees:

All small business applicants must answer each of the following questions to identify potential affiliate businesses.

Affiliate Relationships

During any one (or all) of the previous three tax years, did the applicant or its individual owners/officers:

- 1 Have a controlling ownership interest in other business? Yes No
- 2 Share or have common owners with another business? Yes No
- 3 Share or have common management with another business? Yes No
- 4 Share facilities, equipment or systems with another business? Yes No
- 5 Share employees with another business? Yes No

Please click on the appropriate Yes or No answer to the following questions regarding Small Business eligibility.

Small Business Definition Questions

- 1 Is the applicant firm dominant in its field of operation? Yes No
- 2 Is the applicant firm independently owned & operated? Yes No

Please click on the appropriate Yes or No answer to the following questions regarding Disabled Veterans Business Enterprise eligibility.

DVBE Definition Questions

- 1 Is the DV owner(s) or manager(s) have direct responsibility for subordinator, if any? Yes No
- 2 Is the DV owner(s) or manager(s) have direct responsibility for sub-contractor, if any? Yes No
- 3 Is the DV owner(s) or manager(s) have direct responsibility for the applicant firm's equipment? Yes No
- 4 Is the DV owner(s) or manager(s) have direct responsibility for the applicant firm's materials? Yes No

Key Points:

- Business Page Tab for DVBE Application

Certification Application: Business Page Tab (NP & NVSA)

To Navigate click on the appropriate section

Business [Registration](#) [Business](#) [Other](#)

Certification ID: _____
 Certification Type: **Non-Profit**

Owner Information

Date Business Started: BT

Tax Year Beginning Month:

Business Page(SB) / Business Page(DVBE) / **Business Page(NP & NVSA)** / Other (SB) / Other(NVSA) / Other(NP) / Affiliate p

- Key Points:**
- Business Page Tab for NP & NVSA Application

Certification Application: Business Page Tab (NP & NVSA)

Other Details

Registration Business Owners Address Taxes Other

Certification ID:
Certification Tag Small Business

Various CDE

Agreeing with when you are at: Please Select (optional)

Certification number with the above age: (optional)

Do you have a bid ending within the next 30 business days?

CA Contractors License Information

CA Contractors License: (By State and License)

License Class: C-85-Corporate

Specify the Senior Area details in the following section:

County: State: City: Zipcode:

UNSPC Classifications

Classification: 251010 Product Material Transport & Road Cargo Transport

Enter the individual keywords (description terms, separated by a space) which best describe your business and its offerings. Consider using terms that will help buyers and potential business partners locate your business when they use the State's Online Certified Small Business and DBE search engine. Your keywords are limited to 255 characters. You can update your keywords at any time.

Keywords

COMMERCIAL AVIATION AIRCRAFT CARRY-ON BAGGAGE

WITHOUT STORAGE HANGAR CONSTRUCTION EQUIPMENT

RENTAL LUBING

Answer the following questions as they apply to the applicant firm when fulfilling a contract or purchase order.

Commercially Useful Functions

- When fulfilling your role as a State contractor or purchase order, will your firm provide services and/or products that are not in that contract or purchase order?
- When fulfilling your role as a State contractor or purchase order, will your firm directly perform, manage or supervise a portion of work?
- When fulfilling your role as a State contractor or purchase order, will your firm provide services and/or products that are not in line of business?

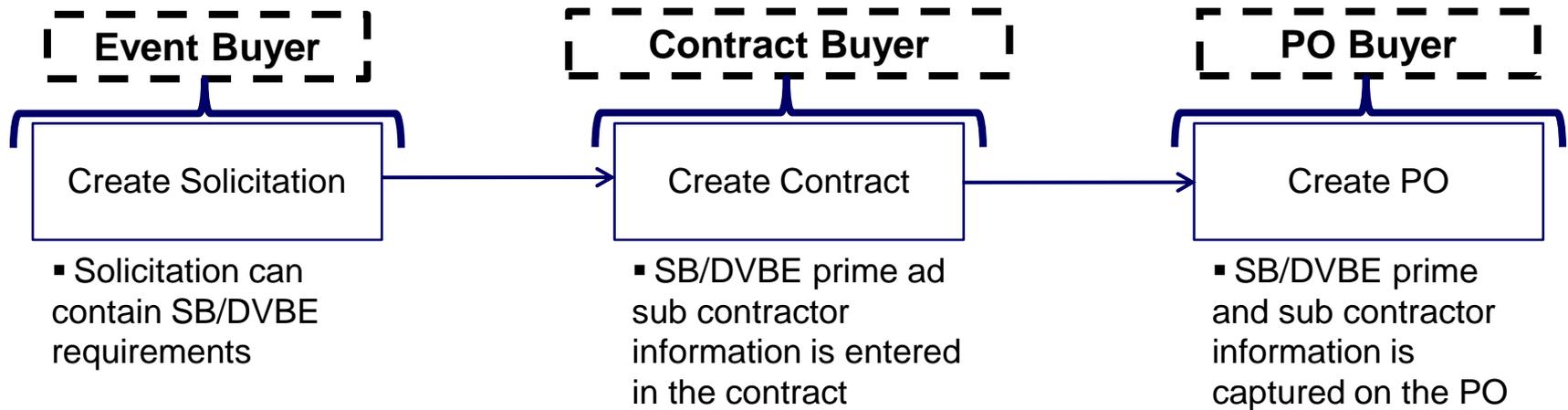
Key Points:

- Business Page Tab for NP & NVSA Application

Recording SB/DVBE Information in Procurement Transactions Overview

- SB/DVBE information captured in Purchase Orders and Procurement Card Transactions
- SB/DVBE information will be collected in solicitations and contained in contracts

Recording SB/DVBE Information in Procurement Transactions Summary Flow



Key Impacts

- SB/DVBE requirements can be included in solicitations as bid factors
- The contract can be set up with SB/DVBE prime and sub contract information
- The PO captures SB/DVBE prime and sub contractor participation

Recording SB/DVBE Information in Procurement Transactions – PO

Maintain Purchase Order

Purchase Order

Business Unit: 3980 PO Status: Pend Appr ✖
 PO ID: 0000000653 Budget Status: Valid
 Copy From: Hold From Further Processing

▼ Header

*PO Date: 05/03/2014 Vendor Search
 *Vendor: STAPLESINC-001 Vendor Details
 *Vendor ID: 0000000002 STAPLES INC.
 *Buyer: Z_DEPT_PO_BUYER Department Buyer

PO Reference:

Header Details Activity Summary
 PO Defaults Document Status
 Requisitions Add Comments
 PO Activities Add ShipTo Comments
 SB/DVBE Contracting

Doc Tol Status: Valid

*Acquisition Type: IT Goods Acquisition Sub -Type:
 *Acquisition Method: CMAS Acquisition Sub-Method:
 DGS Billing Code: 8797

Receipt Status: Not Recvd
 *Dispatch Method: Print

Amount Summary

Merchandise: 864,549.00
 Freight/Tax/Misc.: 73,486.67
 Total Amount: 938,035.67 USD
 Encumbrance Balance: 0.00 USD

Add Items From
 Purchasing Kit Catalog Item Search

Select Lines To Display
 Line: To:

Lines Personalize | Find | View All | | First 1-3 of 3 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	00000000000000000003	Printing & Writing	112.0000	EA	10101502	90.00000	10,080.00	Pending
2	00000000000000000002	Printing & Writing	90.0000	EA	10101501	1,000.00000	90,000.00	Pending

Key Points:

- Purchase Order – SB/DVBE Link from Main Page

Recording SB/DVBE Information in Procurement Transactions – PO

SB/DVBE Contracting

Business Unit: 3980
PO ID: 0000000653

*Doing Business As Name	Certification Number	Small Business	Micro Business	Start Date	Expiration Date	DVBE	Start Date	Expiration Date	Percentage	Prime	Sub
1 Joe's Waste Disposal	2313342	<input checked="" type="checkbox"/>	<input type="checkbox"/>	04/01/2014	10/31/2014	<input type="checkbox"/>			100	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2 Fairfax Cleaners	34221	<input type="checkbox"/>	<input type="checkbox"/>	01/01/2014	12/31/2014	<input checked="" type="checkbox"/>	04/05/2014	05/31/2014	25	<input type="checkbox"/>	<input checked="" type="checkbox"/>

OK Cancel Refresh

Key Points:

- Purchase Order – Prime and Sub contractor SB/DVBE recording

- Prime Contractor is Small Business certified
- Sub Contractor is DVBE certified

Recording SB/DVBE Information in Procurement Transactions – PCard

Reconcile Statement
Procurement Card Transactions

Run Budget Validation on Save

Bank Statement Personalize | Find | View All | [?] [📅] First 1-9 of 17 Last

Transaction Billing [⋮]

	Employee Name	Card Issuer	Card Number	Trans Date	Merchant	*Status	Transaction Amount	Currency
1	<input checked="" type="checkbox"/> Lad,Vikas	USBK1	*****2913	04/28/2005	APPLETON PAPERS INC.	Staged ▼	-2,101.16	USD
2	<input type="checkbox"/> Lad,Vikas	USBK1	*****2913	04/28/2005	APPLETON PAPERS INC.	Staged ▼	-890.00	USD
3	<input type="checkbox"/> Lad,Vikas	USBK1	*****2913	05/12/2005	APPLETON PAPERS INC.	Staged ▼	67,269.31	USD
4	<input type="checkbox"/> Lad,Vikas	USBK1	*****2913	04/28/2005	APPLETON PAPERS INC.	Staged ▼	0.02	USD
5	<input type="checkbox"/> Lad,Vikas	USBK1	*****2913	05/12/2005	APPLETON PAPERS INC.	Staged ▼	67,269.31	USD
6	<input type="checkbox"/> Lad,Vikas	USBNK	*****2913	04/28/2005	APPLETON PAPERS INC.	Verified ▼	-2,101.16	USD
7	<input type="checkbox"/> Lad,Vikas	USBNK	*****2913	05/12/2005	APPLETON PAPERS INC.	Verified ▼	67,269.31	USD
8	<input type="checkbox"/> Lad,Vikas	USBNK	*****2913	04/28/2005	APPLETON PAPERS INC.	Verified ▼	-890.00	USD
9	<input type="checkbox"/> Lad,Vikas	USBNK	*****2913	05/12/2005	APPLETON PAPERS INC.	Verified ▼	67,269.31	USD

Select All Clear All

Search Purchase Details Split Line Distribution Template **SB/DVBE Contracting**

Key Points:

- Procurement Card – SB/DVBE Link in Main Reconciliation page

Recording SB/DVBE Information in Procurement Transactions – PCard

SB/DVBE Contracting

Line: 1 Billing Amount: -2101.16 USD
 Trans Date: 04/28/2005 Reference:
 Posted Date: 04/29/2005
 Merchant: APPLETON PAPERS INC.
 Description: BOL 12345678910

Personalize Find First 1-2 of 2 Last												
*Doing Business As Name	Certification Number	Small Business	Micro Business	Start Date	Expiration Date	DVBE	Start Date	Expiration Date	Percentage	Prime	Sub	
1		<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>
2		<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>

OK Cancel Refresh

Key Points:

- Procurement Card – Prime and Sub contractor SB/DVBE recording

Recording SB/DVBE Information in Procurement Transactions – Contracts

Contract Entry
Contract

SetID: STATE [Copy From Contract](#) Contract Version:

Contract ID: NEXT Version: 1 Status: Current

*Status: Open New Version Approval Due Date:

Administrator/Buyer:

Header

Process Options: Purchase Order [Add Comments](#) [Activity Log](#)

Vendor: [Vendor Search](#) [Contract Activities](#) [Document Status](#)

*Vendor ID: [Primary Contact Info](#) [Thresholds & Notifications](#)

*Begin Date: 09/12/2014 [Contract Releases](#)

Expire Date:

Renewal Date:

Currency: USD CRRNT

Primary Contact:

Vendor Contract Ref:

Description:

Master Contract ID:

Tax Exempt

Amount Summary

Maximum Amount: 0.00 USD

Line Item Released Amount: 0.00

Category Released Amount: 0.00

Open Item Released Amount: 0.00

Total Released Amount: 0.00

Order Contract Options

Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date Rate Date: 09/12/2014

Corporate Contract Adjust Vendor Pricing First Auto Default

Lock Chartfields Price Can Be Changed on Order Dispatch Method: Print

[P.O Defaults](#) [Add Open Item Price Adjustments](#) [Price Adjustment Template](#) [Subcontracting and SB/DVBE Contracting](#)

Contract Items

Catalog Search [Item Search](#) [Search for Contract Lines](#)

Lines [Personalize](#) [Find](#) [View All](#) [First](#) 1 of 1 [Last](#)

Line	Item	Description	UOM	Category	Include for Release	Status
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	Active

Key Points:

- Procurement Contract – SB/DVBE Prime and Sub

Recording SB/DVBE Information in Procurement Transactions – Contracts

Key Points:

- Procurement Contract – SB/DVBE Prime and Sub

SB/DVBE Contracting

Business Unit: 3980
PO ID: NEXT

*Doing Business As Name	Certification Number	Small Business	Micro Business	Start Date	Expiration Date	DVBE	Start Date	Expiration Date	Percentage	Prime	Sub
1		<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>

Personalize Find First 1 of 1 Last

OK Cancel Refresh

SB/DVBE Certification Inquiries and Reporting Overview

- Includes but not limited to:
 - Daily Certification Report
 - Number of Certified Firms (SB, DVBE, NVSA, NP)
 - By Business Type
 - Management Reports
 - Number Certified
 - Number Pending
 - Number Denied

SB/DVBE Certification Inquiries and Reporting Overview

- SB/DVBE Contracting Activities (STD 810)
 - Reports of award/expenditure dollars for each Certification Type (SB, MB, DVBE), by Acquisition Type (Non-IT Goods, Non-IT Services, IT Goods and Services, Construction, P-Card) for prime and sub contractors

SB/DVBE Certification Inquiries and Reporting Overview

- Public Inquiries and Reporting
 - Public inquiry on certification status (prime seeking subs, subs seeking prime, State and External Buyers, FI\$Cal users, etc.).
 - eSuppliers will be able to inquire if they have been identified as a sub on any contract or purchase order
 - Inquiry results downloadable to Excel

Public Searches

The State of California Certifications

Business Name:

Supplier ID:

Certification Type:

- Micro Business (MB)
- Small Business (SB)
- Disabled Veteran Business Enterprise (DVBE)
- Non-Profit Veteran Service Agency (NVSA)
- Non-Profit (NP)

Business Type:

- Construction
- Manufacturer
- Non-Manufacturer
- Service

Keywords:

Selected Keywords

Zip Code(s):

Selected Zip Codes

City:

Key Points:

- Search for Certified Firm

Public Searches

City:

Service Area:

UNSPC Classifications:

Selected UNSPC Classifications

NAICS Classifications:

Selected NAICS Classifications

Construction/Contractors License Codes:

Search Results

Supplier Name	Certification	Legal Business Name	Doing Business As:	Email	View
AAMCO Transmissions	MB	BERHANCO INC.	AAMCO Transmissions	Email: azariab@pacbell.net	View Profile

Key Points:

- Search for Certified Firm

Technology Considerations – Conversions

Conversion	Definition
SB/DVBE Conversion	Existing SB/DVBE Certified Firms will be converted from Bid Sync

Next Steps

- Share BPW materials at your department
- Complete the BPW Change Impact Tool
- Review with your FI\$Cal CMO Department Readiness Coordinator
 - Identify and work on updating internal department policies, processes, and documentation
- Prepare for:
 - Role Mapping Workshop – November 2014
 - Change Workshop – February 2015

Role Mapping Working Session

- 2-hour facilitation session Intended for Wave 1 and Wave 2 Department Implementation Team (DIT) members
- FI\$Cal will provide DITs with detailed instructions on how to fill out the Role Mapping Tool for their department
 - “Do’s and Don’ts” of the Role Mapping Template
 - To take place at:

FI\$Cal Project site
2000 Evergreen Street
Jade Auditorium
Thursday, November 6, 2014
9:00 a.m. – 11:00 a.m.

*Remote Dial-In will be available to those geographically dispersed

SB/DVBE Bidder & Vendor Certification

Change Impact Activity

- Description:
 - FI\$Cal walk through one example change impact
 - At your table, discuss how the FI\$Cal business processes and related change impacts may affect your department
 - Document **three impacts** in your BPW Change Impact Tool
- Roles:
 - **Facilitator** – Helps lead the discussion with your department on the FI\$Cal business processes and change impacts
 - **Recorder(s)** – Captures the department-specific impacts from the activity in your BPW Change Impact Tool
- Time:
 - You will have 30 minutes for this activity.

Question and Answer



FI\$Cal Project Information:

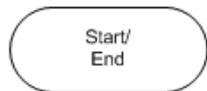
<http://www.fiscal.ca.gov/>

or e-mail the FI\$Cal Project Team at:

fiscal.cmo@fiscal.ca.gov

Appendix

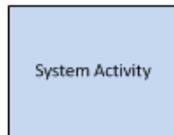
Guide to Symbols in Flows



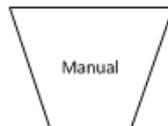
Start/End - Indicates point at which the process begins or ends. Does not represent any activity.



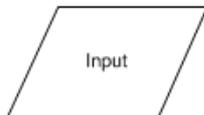
Decision - shows a decision point, such as yes/no. Each path emerging from the diamond is labeled with one of the possible answers.



System Task - Represents an individual step or activity in FI\$Cal.



Manual Task - Represents an individual step or activity in the process that is made out of FI\$Cal.



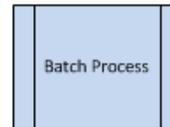
Input Documents - A paper document (or email) that is used for entering data in the process. For electronic data the Interface shape is used.



Connector - On/Off-Page Connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page. Connectors are labeled with UPPER CASE letters.



Interface - Data conversion from one electronic system to another.



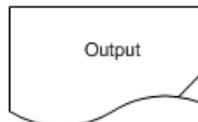
Batch Process - Represents a batch process within FI\$Cal.



Flow Arrow



Intra Integration Process - A input or Output to some other process within the same capability



Output Documents - An electronic document that is created by the process and can be printed (for example - any kind of report).

ChartField / UCM Codes Cross-reference

