Access Equity User Guide

Table of Contents

Purpose

This document defines user roles and responsibilities, and provides system instructions to agencies and educational institutions on the use of the Access Equity system for the advancement of business equity, inclusion, and engagement in public procurement. Access Equity is comprised of three modules: Contract Compliance, Outreach, and Goal Plan.

Applicability

The use of the Contract Compliance Module applies to all state agencies and educational institutions. The use of the module aligns with the Department of Enterprise Services [DES] Contracts and Procurement Policies, the DES Supplier Diversity Policy and Handbook, and is further supported by Executive Order 22-01, OMWBE's EO 22-01 Implementation Guide, and RCW 39.19. Applicable state agencies and educational institutions that execute or amend a public contract that includes a subcontractor shall enter contractual data outlined in this user guide.

OMWBE will ask about procurement outreach efforts on a regular basis, including as part of annual goals as required in RCW 39.19.030. Additionally, OMWBE will follow up with agencies and educational institutions that are at risk of not meeting goals or that fall into one of the lower quintiles as part of RCW 39.19.060 reporting.

Authority

The authorizing environment for the Contract Compliance Module is RCW.39.19.250. The Office of Minority and Women's Business Enterprises (OMWBE) is the state agency responsible for developing programs to maximize opportunities for minority- and women-owned businesses in public contracting and procurement, including reporting spend data and progress by state agencies and educational institutions.

Executive Order 22-01 directs OMWBE to lead efforts for enterprise-level electronic data collection and monitoring to track participation in public contracting and procurement per its authority and direction in RCW 39.19.

Executive Order 22-01 also requires small and executive cabinet agencies and invites other agencies and government entities, including educational institutions, to use the Tools for Equity in Public Spending, which includes outreach efforts to inform businesses of opportunities to bid on contracts and make them aware of agency procurement needs.

Equity in Public Spending Executive Order 22-01

RCW 39.19.030 Office of minority and women's business enterprises—Director—Powers and duties.

RCW 39.19.060 Compliance with public works and procurement goals—Plan to maximize opportunity for minority and women-owned businesses.

WAC 326-30-110 Monitoring of compliance with RCW 39.19.

RCW 39.19.250 Participation in contracts by qualified minority and women-owned and controlled businesses—Data—Contact people—Reports.

Background

OMWBE is charged with the implementation of Executive Order [EO] 22-01 which provides measures intended to address the recommendations outlined in the 2019 Washington State Disparity Study, which examined disparities in public spending by the state. The study confirmed there is unequal access to state contracting opportunities across Washington for minority- and women-owned businesses. It recommends the implementation of an enterprise-level electronic data collection and monitoring system to identify gaps in the OMWBE directory and to track participation in public contracting and procurement per its authority and direction in RCW 39.19.250.

Current state financial systems do not capture payments made to subcontractors. Therefore, OMWBE has historically collected subcontractor data manually and relies on data from various sources to determine the level of diversity in state spending. OMWBE cannot consistently monitor and report at the level of compliance necessary to meet requirements with the data currently available.

Outreach Module Overview

The Outreach Module is a flexible and user-friendly function in the Access Equity system. Users can create and manage lists of OMWBE certified businesses, campaigns to notify businesses, and events for sharing information about opportunities to bid for contracts.

Functionalities

- Program notices, bid notifications, requests for information, seminar/training sessions with optional online RSVP capabilities, or any other messages that users wish to send.
- Users can search for businesses by name, region, or NAICS codes, then add them to the contact list.
- All content can be customized by the user and can include text, graphics, web links, and/or attachments.
- Outreach messages can include automated, pre-set reminders, and the ability for recipients to respond with an attachment.

- All views of Outreach messages and the public bulletin board are tracked so users know how many people are seeing the messages.
- Events provide public access to online or in-person events, online registration, automated reminders, and attendance tracking.
- Users can include links to external survey tools in the content and messages to collect and analyze data about an outreach campaign, event, and/or program activity.

Components

- Vendor Lists
  - Create and manage lists of businesses by type of service or product
- Outreach Campaigns
  - Rapidly distribute information to many contacts
- Events
  - Host in-person or online events, including registration and attendee tracking

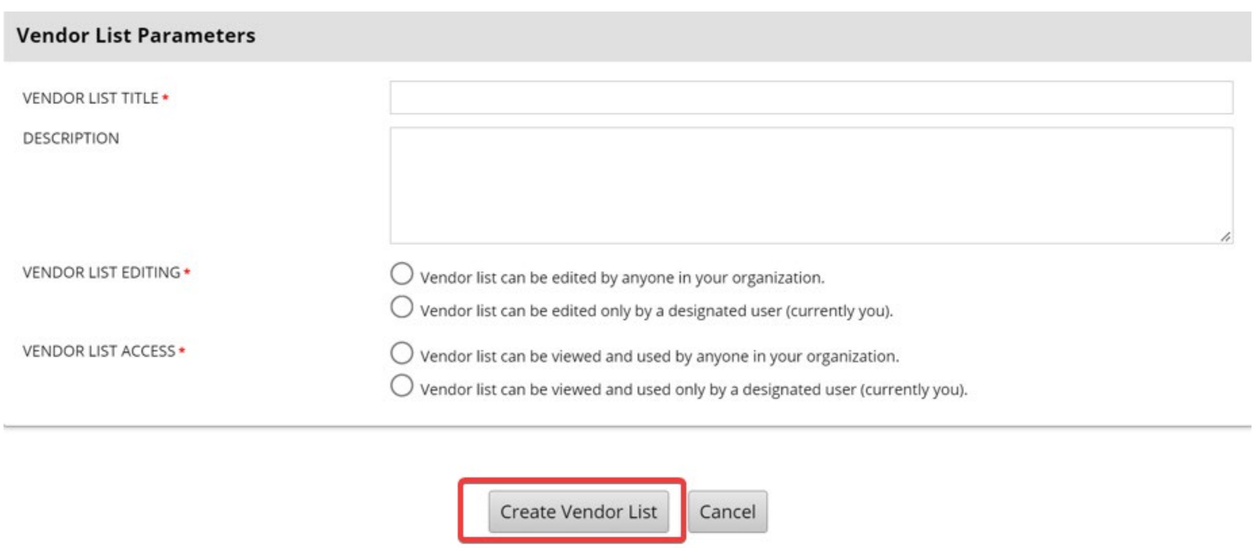
Roles

Unlimited Outreach Manager roles

Procedure

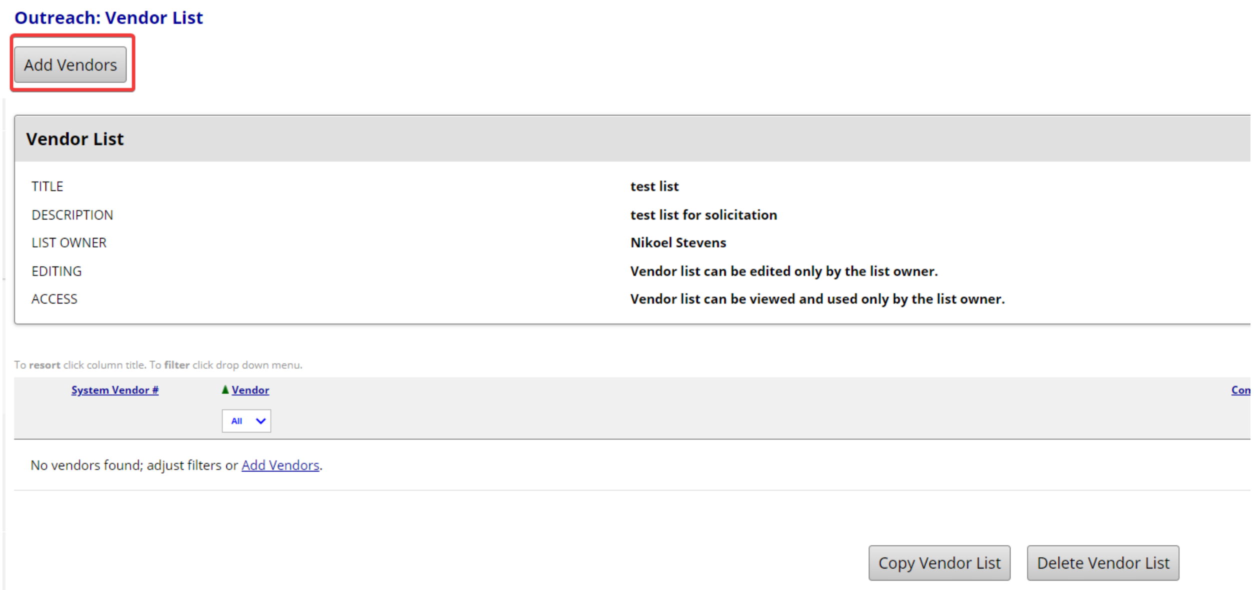
Create Vendor List

*required entry



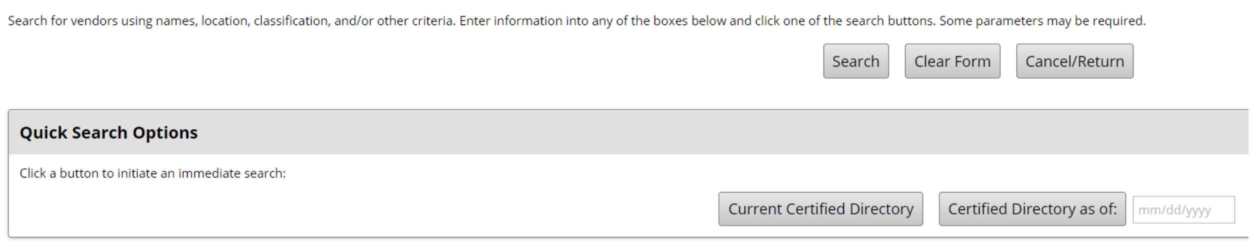
Select **Create >> New Vendor List** from left navigation bar

- Enter **VENDOR LIST TITLE**
- Add a **DESCRIPTION**
- Select **VENDOR LIST EDITING** & **VENDOR LIST ACCESS** radio options
- Click **Create Vendor List**

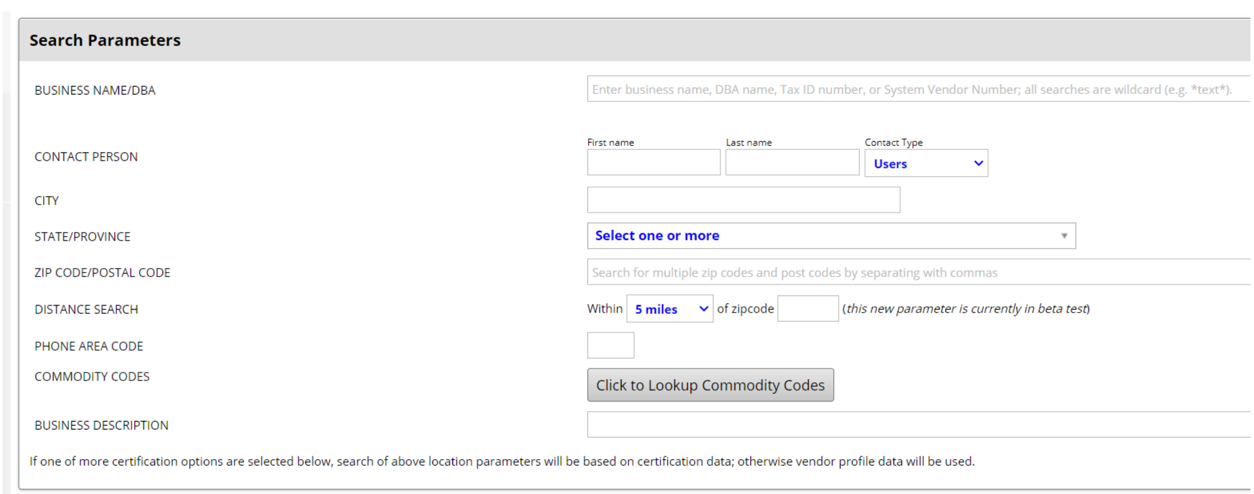


Add Vendors to the List

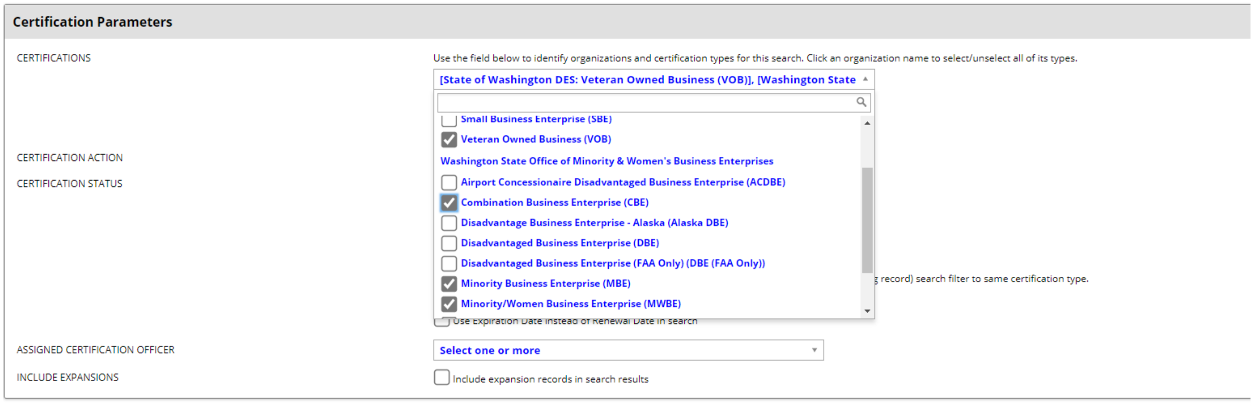
- Click **Add Vendors**



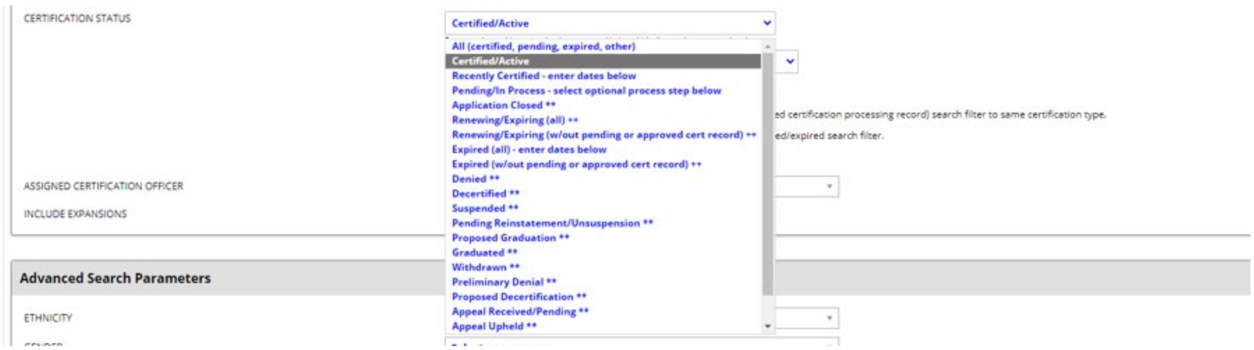
- Search by **Certified Directory**



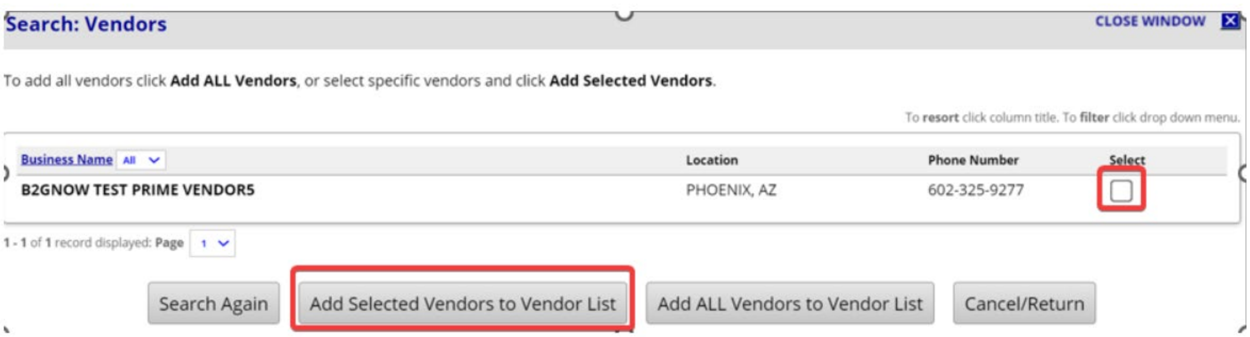
- By specific **Search Parameters**



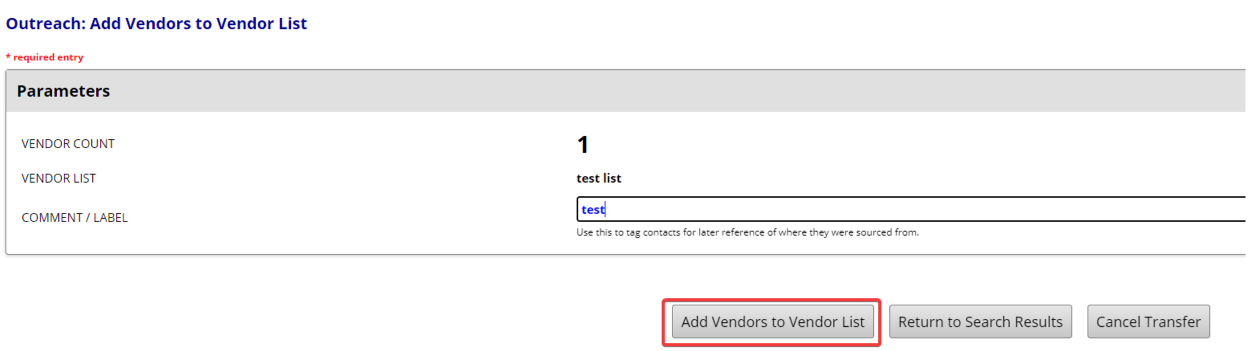
- By **Certification Parameters**
- For WA state DVA and OMWBE certifications select:
    - Veteran Owned Business [VOB]
    - Combination Business Enterprise [CBE]
    - Minority Business Enterprise [MBE]
    - Minority/Women Business Enterprise [MWBE]
    - Socially and Economically Disadvantaged Business Enterprise [SEDBE]
    - Women Business Enterprise [WBE]



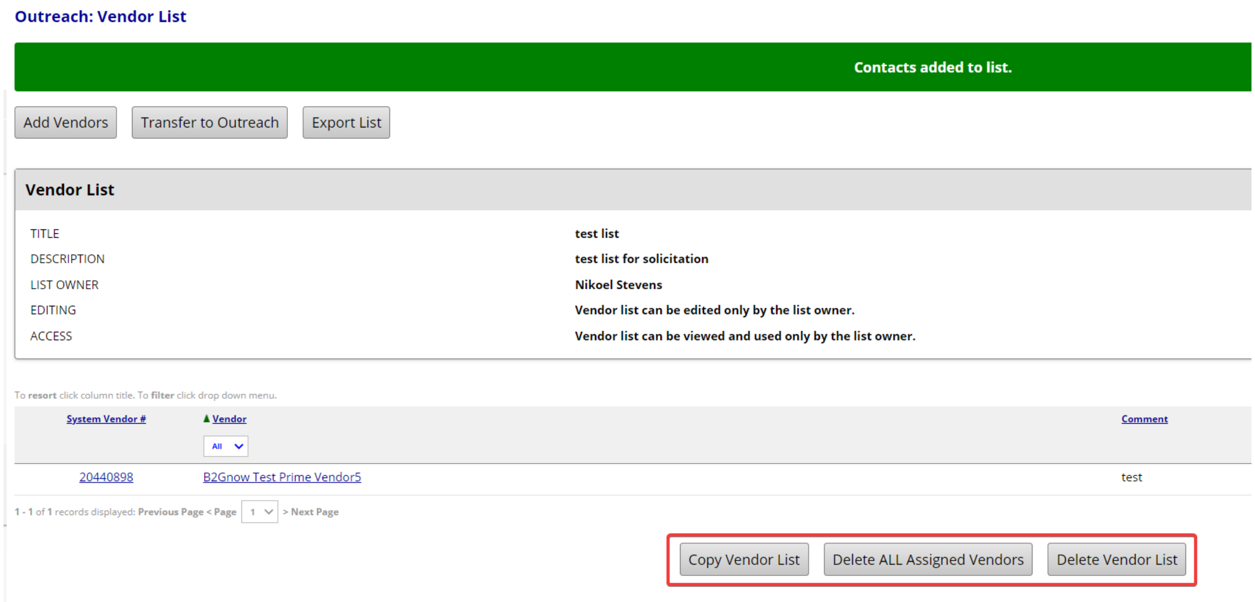
- Do not select any **Advanced Search Parameters**



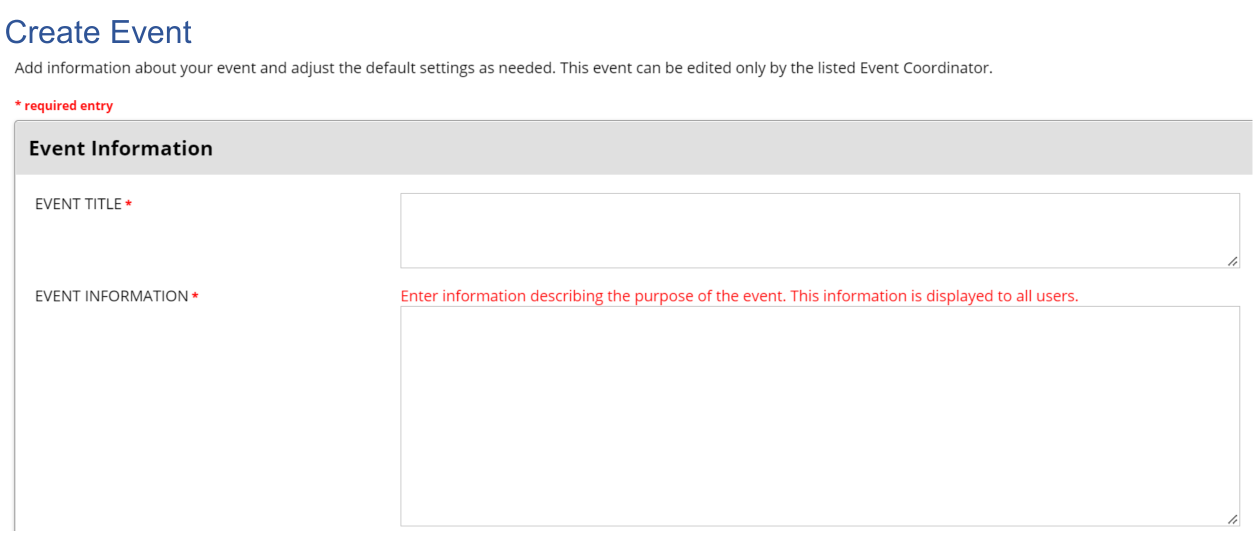
- Select vendors to add to list
- Click **Add Selected Vendors to Vendor List**



- Optional: Enter a tag into **COMMENT/LABEL**
- Click **Add Selected Vendors to Vendor List**

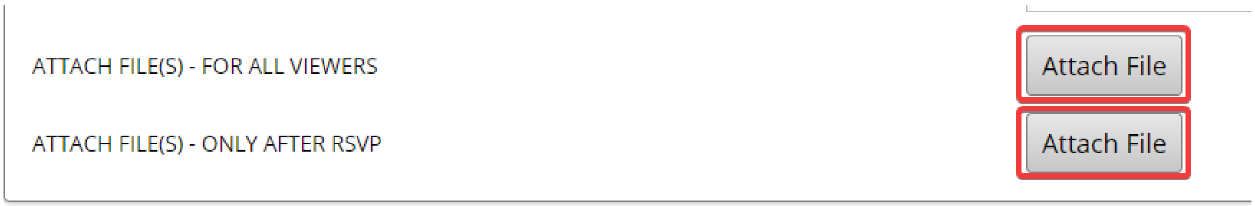


- Other options available as needed

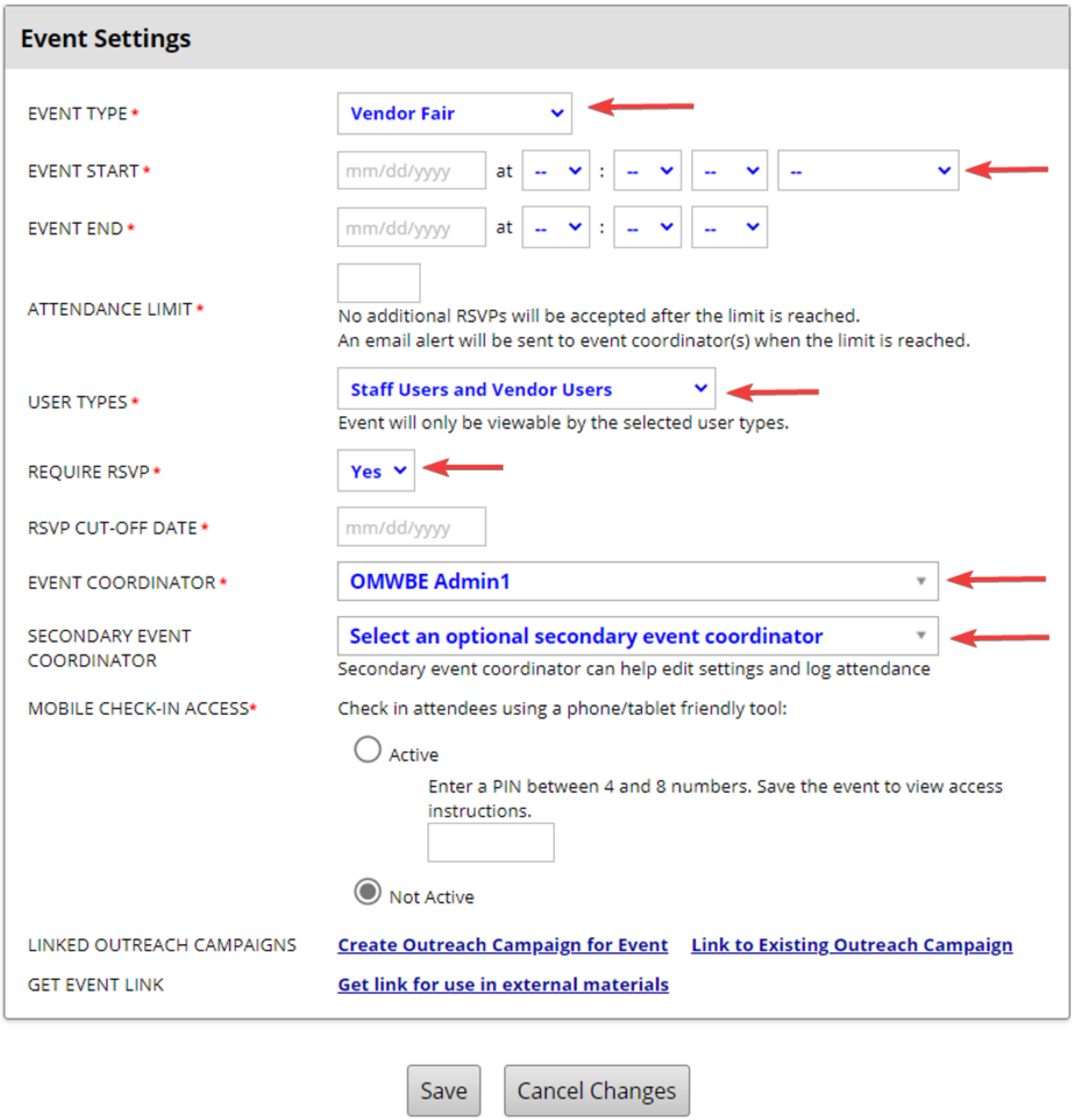


Event Information

- Select **Create >> New Event** from left navigation bar
- Enter **EVENT TITLE**
- Enter **EVENT INFORMATION**
- Enter **EVENT INSTRUCTIONS**
- Enter **EVENT INSTRUCTIONS CONFIRMATION**



- Attach File(s)
  - Attach File(s) – For all Viewers
  - Attach File(s) – Only after RSVP

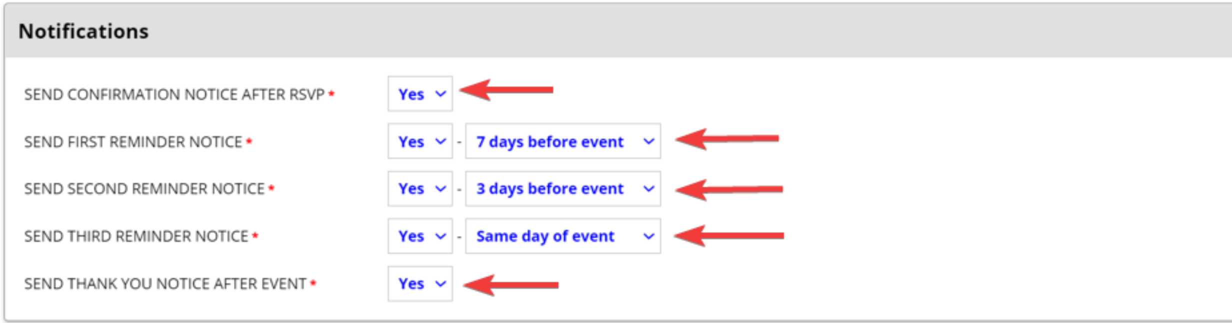


Event Setting

- Select **EVENT TYPE** from drop-down menu

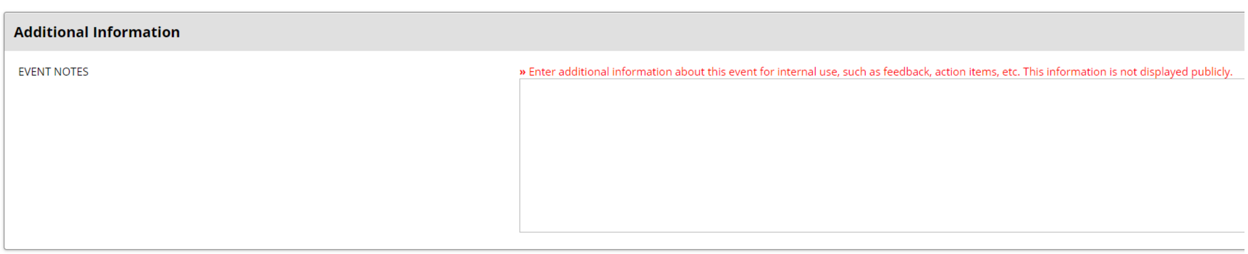
  NOTE: The selection does not change any functions; it is only used for tracking.

  - Education
  - Pre-Bid Conference
  - Training
  - Vendor Fair
- Enter **EVENT START** date, time, and region
  - Eastern time
  - Central time
  - Mountain time
  - Pacific time
- Enter **EVENT END** time
- Enter **ATTENDANCE LIMIT**
- Select **USER TYPES** from drop-down menu
  - Staff Users – Only staff with Access Equity/B2G logins can view
  - Vendor Users – Only vendors registered in Access Equity/B2Gnow can view
  - Public – Anyone can view
  - Combination
    - NOTE: no Staff Users and Public option
- Select **REQURE RSVP from** drop-down menu
  - Yes
  - No
    - NOTE: Selecting ‘no’ requires remote conference ID information and location detailed in **EVENT INFORMATION** and **EVENT INSTRUCTIONS** fields above.
- Enter **RSVP CUT-OFF DATE**
- Select **EVENT COORDINATOR** from drop-down menu
- Select **SECONDARY EVENT COORDINATOR**
- Select option for **MOBILE CHECK-IN ACCESS**
  - NOTE: Select ‘**Not Active**’ if event is remote only, or if no check-in station at in-person event.



Notifications

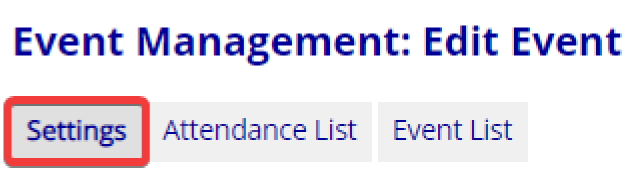
- Select **SEND CONFIRMATION NOTICE AFTER RSVP** from drop-down menu
    - NOTE: Confirmation message is customizable (see above) but the reminders use template text that includes the event date and time. The "day of" reminder will go out in the morning, however, if the event start time is before 8:00, it may not reach attendees prior to meeting.
- Select **SEND FIRST REMINDER NOTICE** and timing from drop-down menus
- Select **SEND SECOND REMINDER NOTICE** from drop-down menus
- Select **SEND THIRD REMINDER NOTICE** from drop-down menus
    - NOTE: Reminders should be sent out at least a week apart and not on close dates. Scheduling reminders close to each other may be flagged as spam.
- Select **SEND THANK YOU NOTICE AFTER EVENT** from drop-down menu
    - NOTE: This message is not customizable and will use B2G's default message.



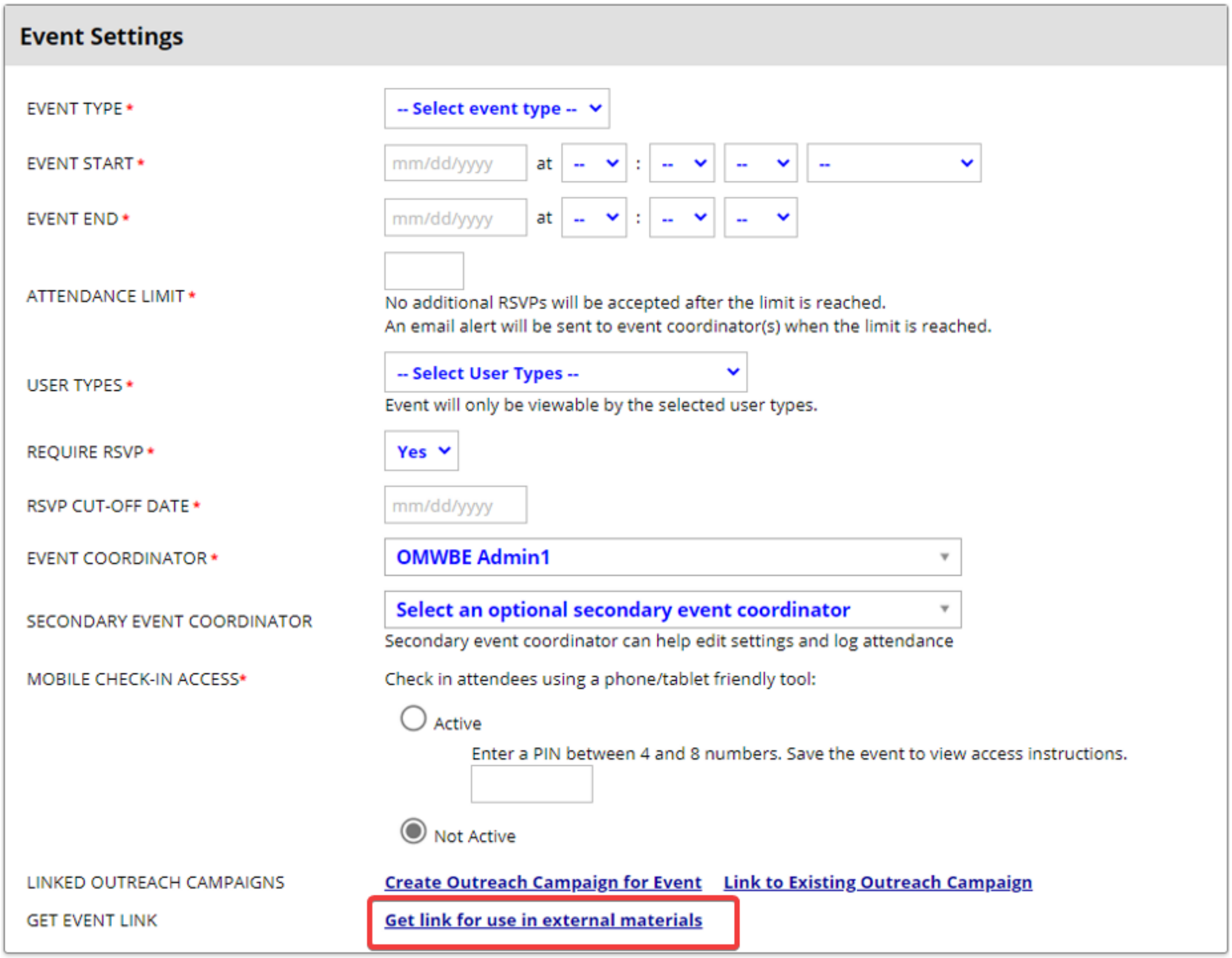
Additional Information

- Enter **EVENT NOTES** – Not viewable to invitees.
- Select **Save**

NOTE: After creating event, the system will generate a shareable link.

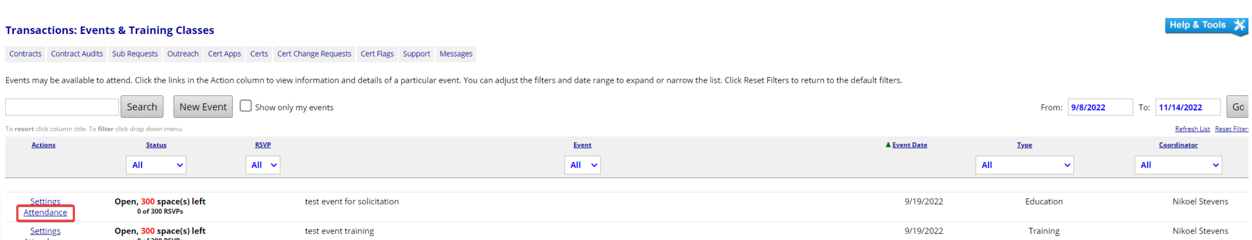


Event Settings >> Get link for use in external materials

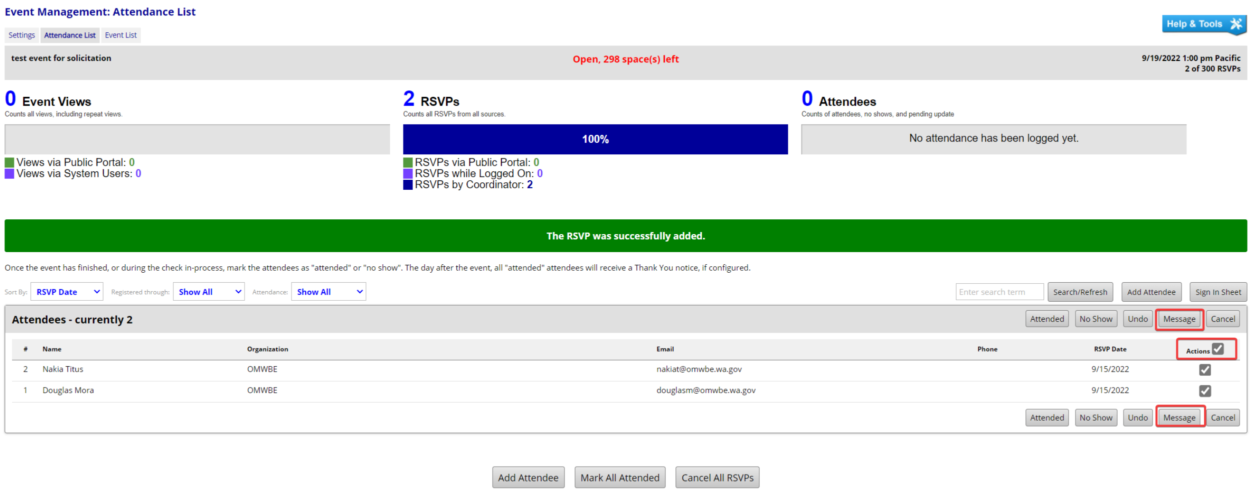


Cancel Event

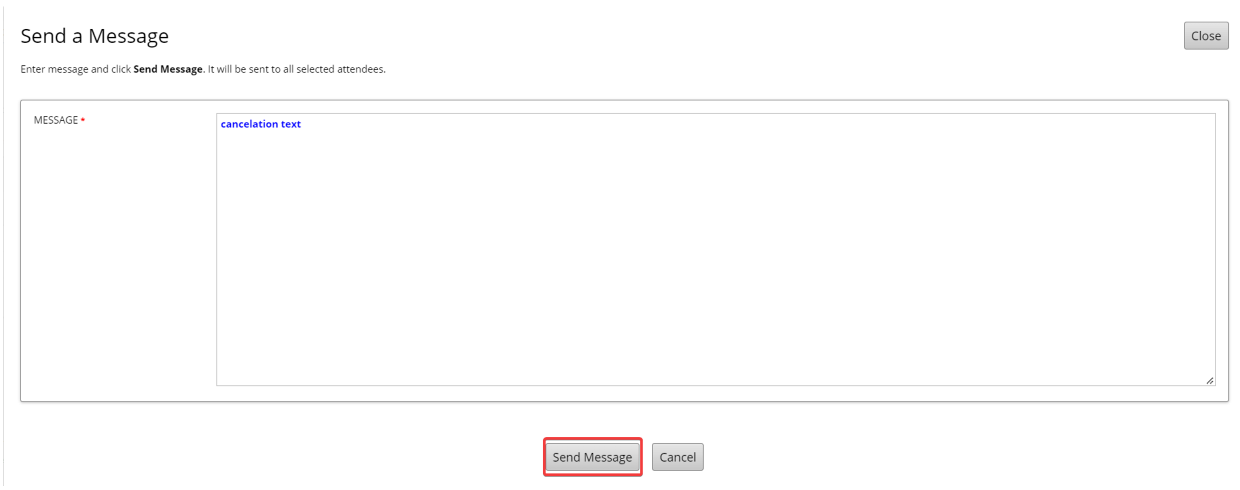
NOTE: Delete feature does not function as intended. Follow directions below to cancel events.



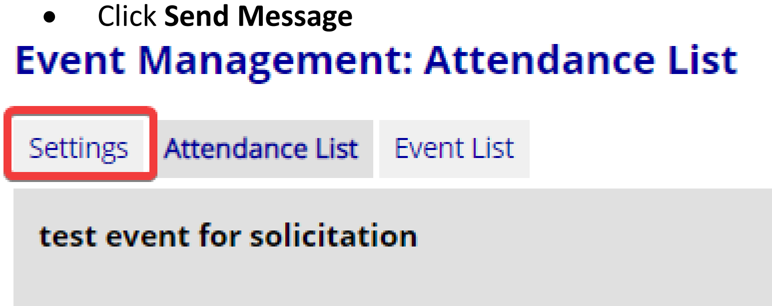
- Select **View >> Events** from left navigation bar
- Optional to notify attendees who responded:
- Select **Attendance**



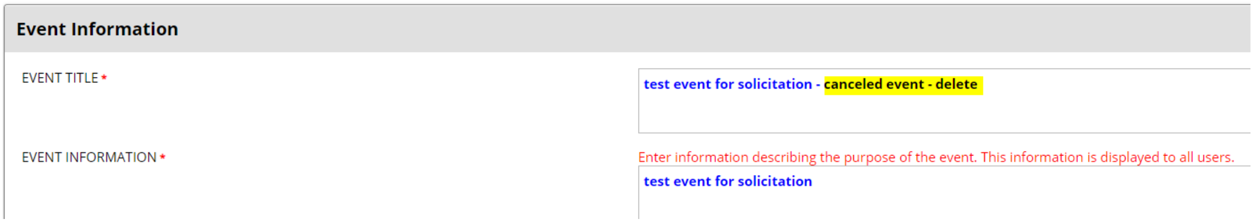
- Check box(es) next to **Actions** to select all)
- Click **Message**



- Enter text
- Click **Send Message**



- Go to **Settings** tab

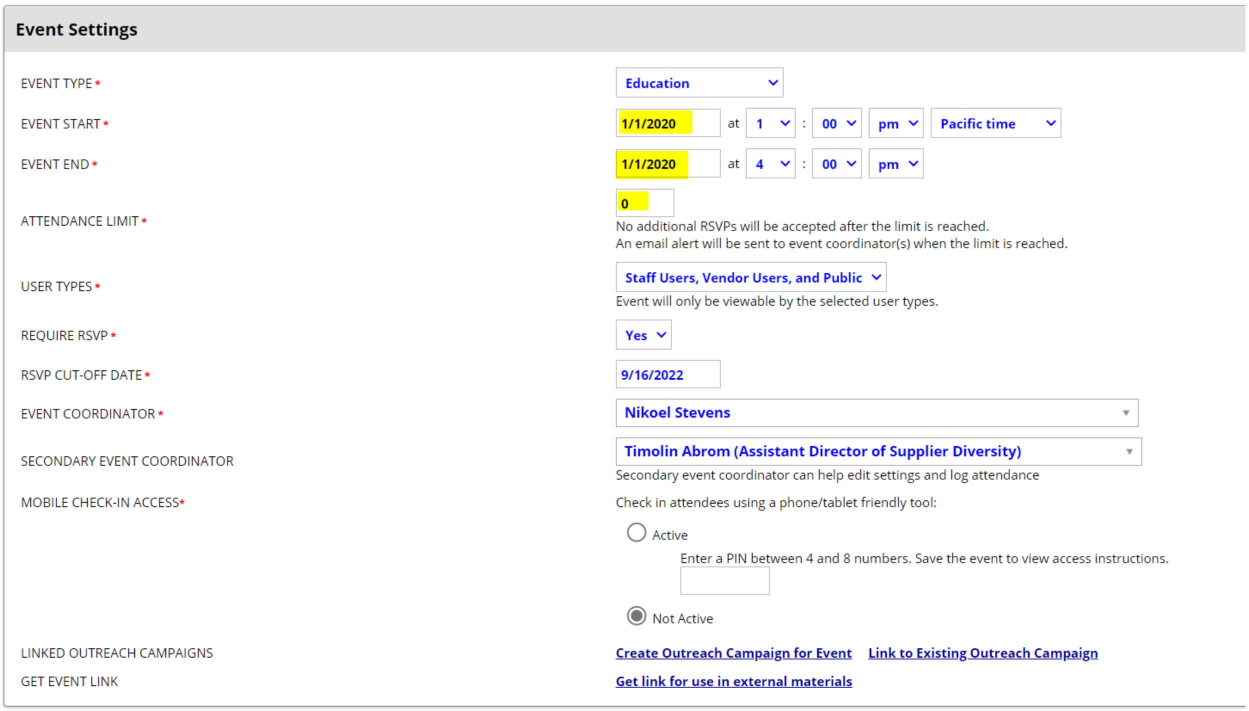


Event Information

EVENT TITLE * — test event for solicitation - canceled event - delete

EVENT INFORMATION * — Enter information describing the purpose of the event. This information is displayed to all users.
test event for solicitation

- Add text to the **EVENT TITLE**
    - e.g., DUPLICATE EVENT-DELETE or CANCELED EVENT-DELETE



Event Settings

EVENT TYPE * — Education

EVENT START * — 1/1/2020 at 1 : 00 pm Pacific time

EVENT END * — 1/1/2020 at 4 : 00 pm

ATTENDANCE LIMIT * — 0
No additional RSVPs will be accepted after the limit is reached.
An email alert will be sent to event coordinator(s) when the limit is reached.

USER TYPES * — Staff Users, Vendor Users, and Public
Event will only be viewable by the selected user types.

REQUIRE RSVP * — Yes

RSVP CUT-OFF DATE * — 9/16/2022

EVENT COORDINATOR * — Nikoel Stevens

SECONDARY EVENT COORDINATOR — Timolin Abrom (Assistant Director of Supplier Diversity)
Secondary event coordinator can help edit settings and log attendance

MOBILE CHECK-IN ACCESS* — Check in attendees using a phone/tablet friendly tool:
Active
Enter a PIN between 4 and 8 numbers. Save the event to view access instructions.
Not Active

LINKED OUTREACH CAMPAIGNS — Create Outreach Campaign for Event — Link to Existing Outreach Campaign

GET EVENT LINK — Get link for use in external materials

- Set the **EVENT START** and **EVENT END** times to dates in the distant past (e.g. 1/1/2020)
- Set the **RSVP CUT-OFF DATE** to the same date as the Event End date
- Set the **ATTENDANCE LIMIT** to 0

Notifications

SEND CONFIRMATION NOTICE AFTER RSVP * — No

SEND FIRST REMINDER NOTICE * — No - 7 days before event

SEND SECOND REMINDER NOTICE * — No - 3 days before event

SEND THIRD REMINDER NOTICE * — No - Same day of event

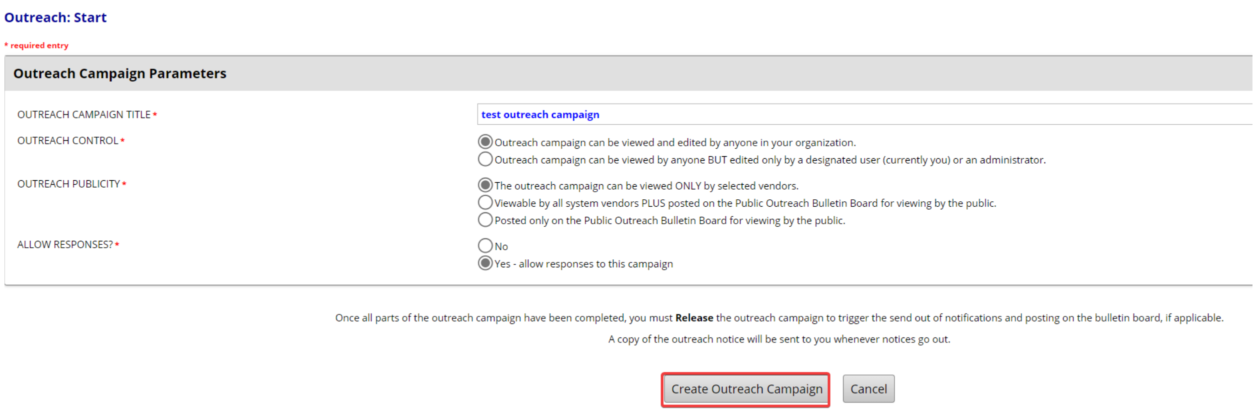
SEND THANK YOU NOTICE AFTER EVENT * — No

- Set all **NOTIFICATIONS** to ‘No’

- Click **Save**

Create Outreach Campaign

- Select **Create >> New Outreach**



Outreach Campaign Parameters

- Enter **OUTREACH CAMPAIGN TITLE**
- Select **OUTREACH CONTROL** option
- Select **OUTREACH PUBLICITY** option
- Select **ALLOW RESPONSES?** option

  NOTE: Once a campaign is created, an option to enter email addresses will appear.
- Click **Create Outreach Campaign**

Outreach Management

Main | Settings | Content | Vendor List

test outreach campaign — **Outreach incomplete**

Outreach Campaign Information

OUTREACH CAMPAIGN TITLE	**test outreach campaign**
STATUS	**Outreach incomplete**
SYSTEM TRANSACTION NUMBER	**07259742-0001**
DATE CREATED	**9/15/2022**

Outreach Alerts

ALERT 1	**Outreach settings have not been completed (Complete settings)**
ALERT 2	**Outreach content has not been completed (Enter content)**
ALERT 3	**No vendors assigned to outreach (Get vendors)**

Outreach Campaign Message Settings

MESSAGE SUBJECT	**Outreach settings have not been completed (Complete settings)**
FROM NAME	**Outreach settings have not been completed (Complete settings)**
FROM EMAIL	**Outreach settings have not been completed (Complete settings)**
REPLY-TO EMAIL	**Outreach settings have not been completed (Complete settings)**

Outreach Status, Settings & Actions

	Status
OUTREACH CONTROL	**Outreach campaign can be edited by anyone in your organization.**
OUTREACH PUBLICITY	**The outreach campaign can be viewed ONLY by selected vendors.**
OTHER SETTINGS	**Not completed**
OTHER FUNCTIONS	Close Outreach, Copy Outreach
ALLOW RESPONSES	**Yes** **Response Due Date:** Not set **Document Submission Required: No**

- Go to **Settings** tab

* required entry

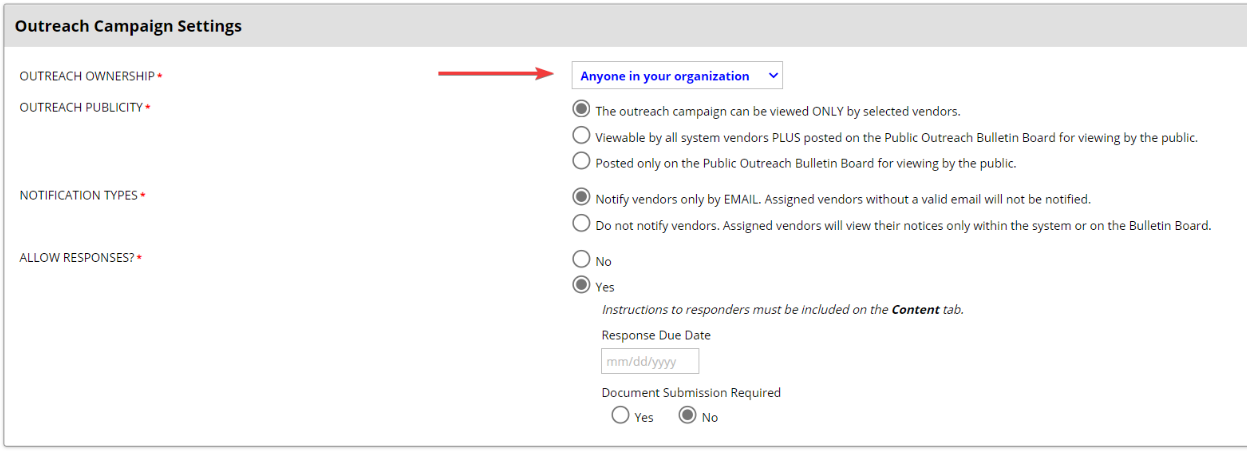
Outreach Campaign Information

OUTREACH CAMPAIGN TITLE *	test outreach campaign
COMMENTS	» Enter optional comments to describe the purpose of this outreach campaign. This information is not displayed to vendors.

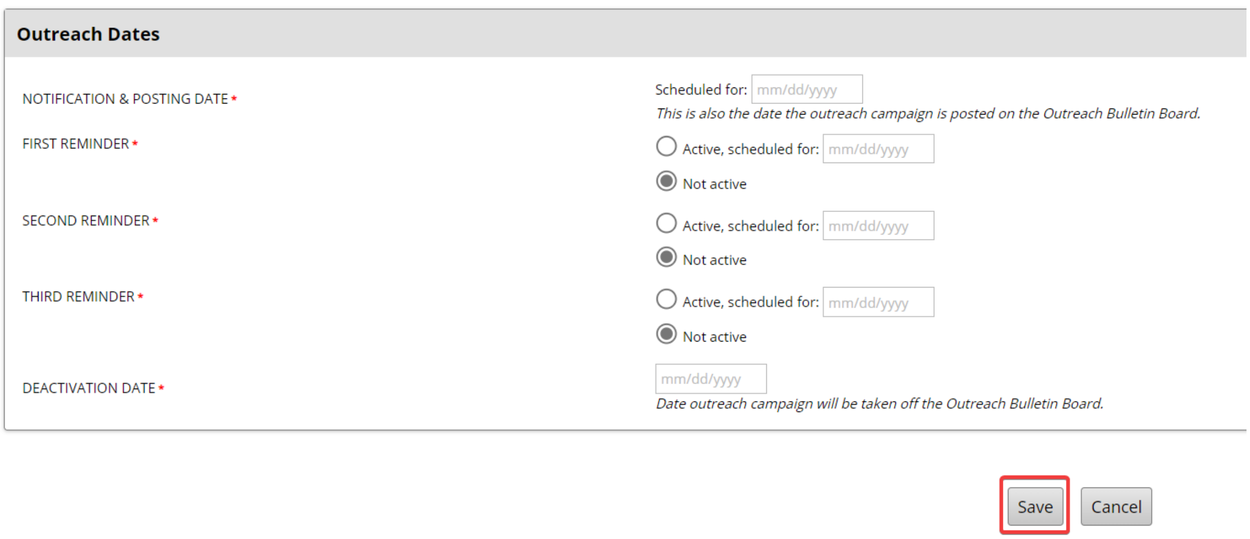
Outreach Campaign Message Settings

MESSAGE SUBJECT *	(Copy Title)
FROM NAME * This will be the "from name" on the email.	Nikoel Stevens [Washington State Office of Minority & Women's Business Enterprises]
FROM EMAIL	**OMWBE@diversitycompliance.com** To comply with spam laws, this verified email address cannot be changed.
REPLY-TO EMAIL * This will be the email to which replies are routed.	nikoels@omwbe.wa.gov

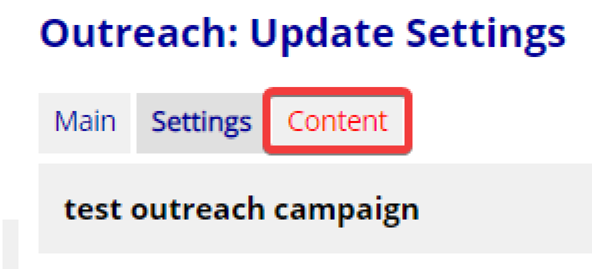
- Enter **MESSAGE SUBJECT** or use ‘**(Copy Title)**’ link



- Select options:
    - **OUTREACH OWNERSHIP**
    - **OUTREACH PUBLICITY**
    - **NOTIFICATION TYPES**
    - **ALLOW RESPONSES**

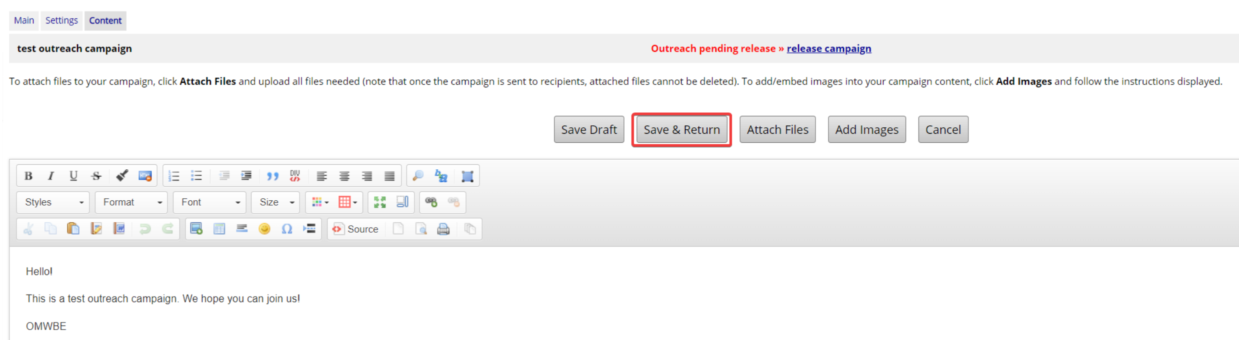


- Enter **NOTIFICATION & POSTING DATE**
- Select **options:**
    - **FIRST REMINDER**
    - **SECOND REMINDER**
    - **THIRD REMINDER**
        - NOTE: Reminders should be sent out at least a week apart and not on close dates. Scheduling reminders close to each other may be flagged as spam.
- Enter **DEACTIVATION DATE**



- Select **Content** tab

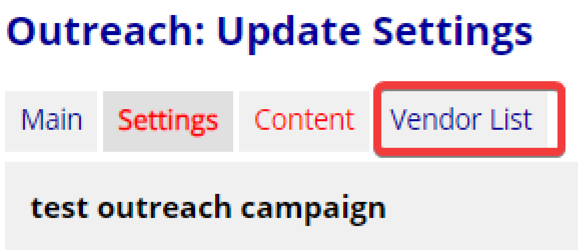
- Click **Edit**

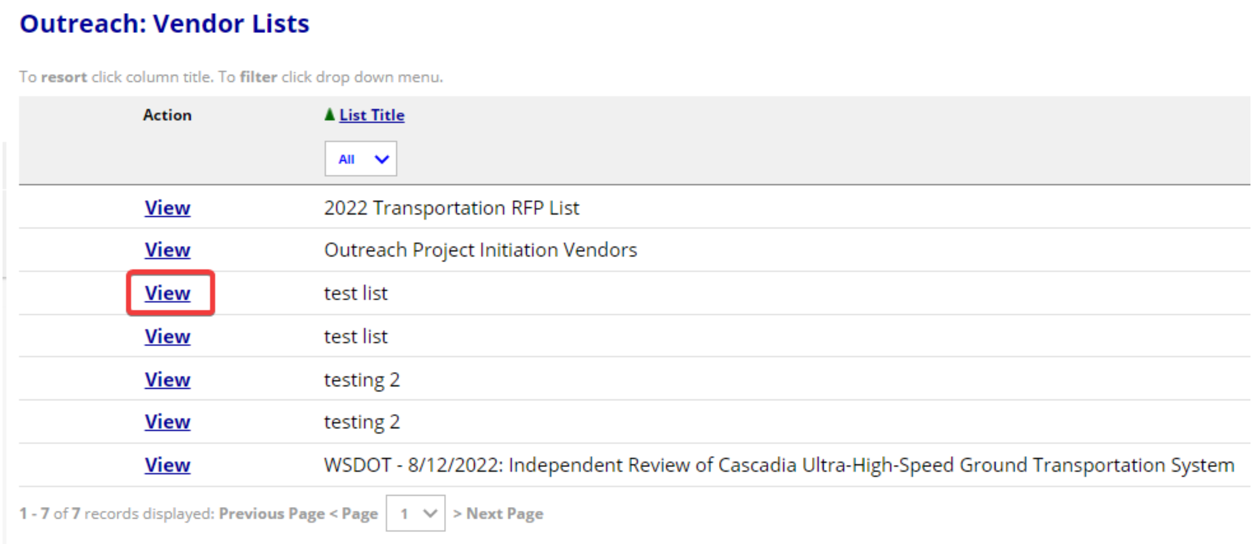


- Write your message
    - The editor allows you to use formatting to highlight and emphasize text, including bold, underline, italics, and different font sizes or colors. You can also embed pictures (e.g. agency logos) and links to information in WEBS or other posted documentation.
- Click **Save & Return**

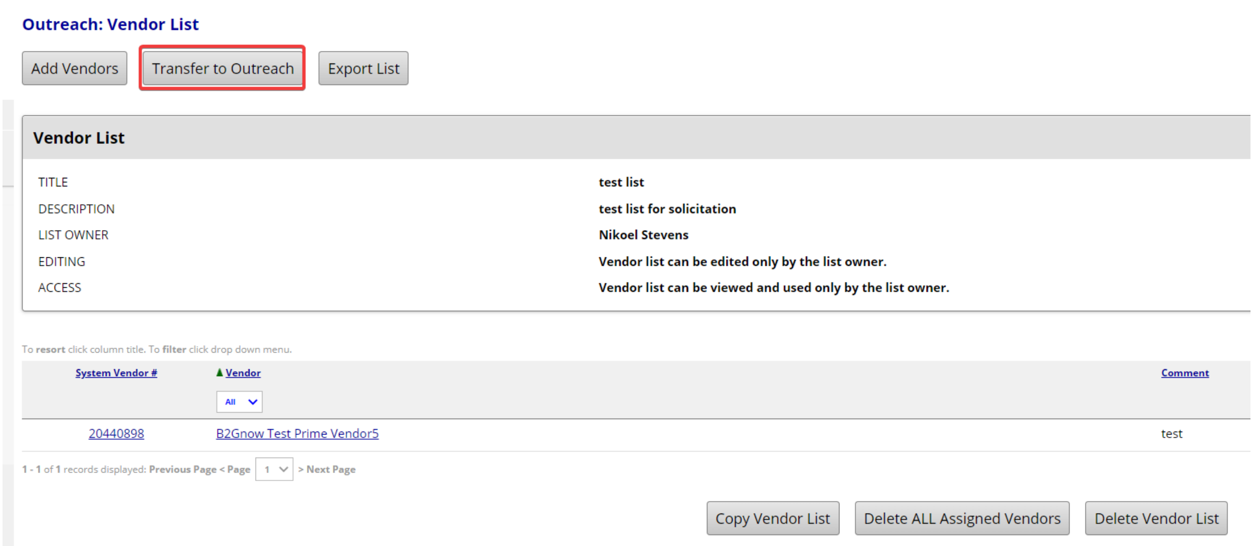
Add Vendors to a Campaign

- Select **View >> Vendor Lists** from left navigation bar or **Vendor List** tab





- Select **View** for list

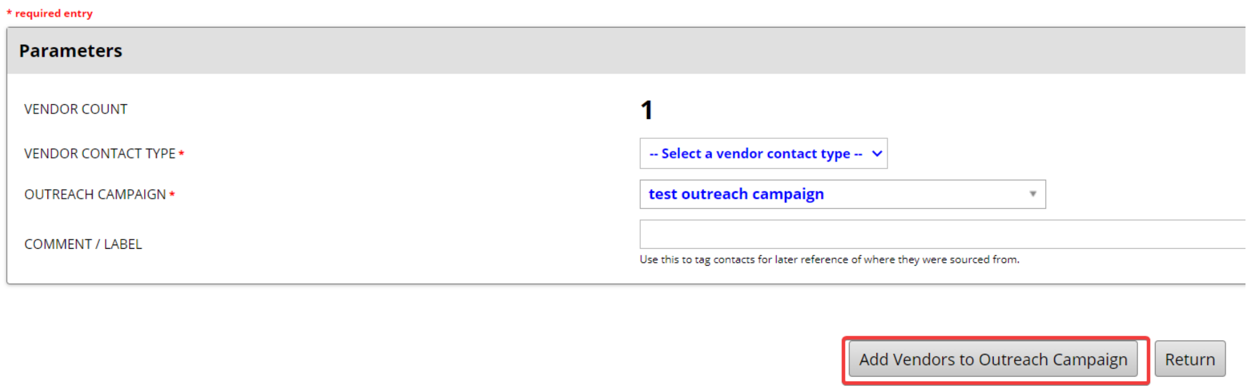


- Click on **Transfer to Outreach**

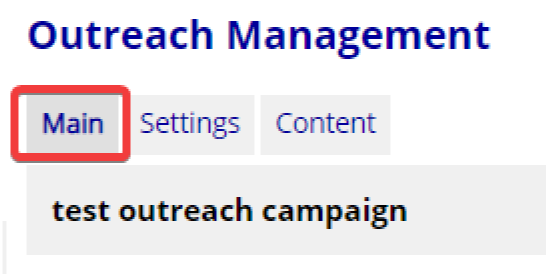
- Select **VENDOR CONTACT TYPE**
  - NOTE: Only one contact type can be selected.
  - Outreach campaign goes only to email address assigned by vendor for the contact type selected.
  - Select '**General**' if uncertain about audience.

- Select **Outreach Campaign**

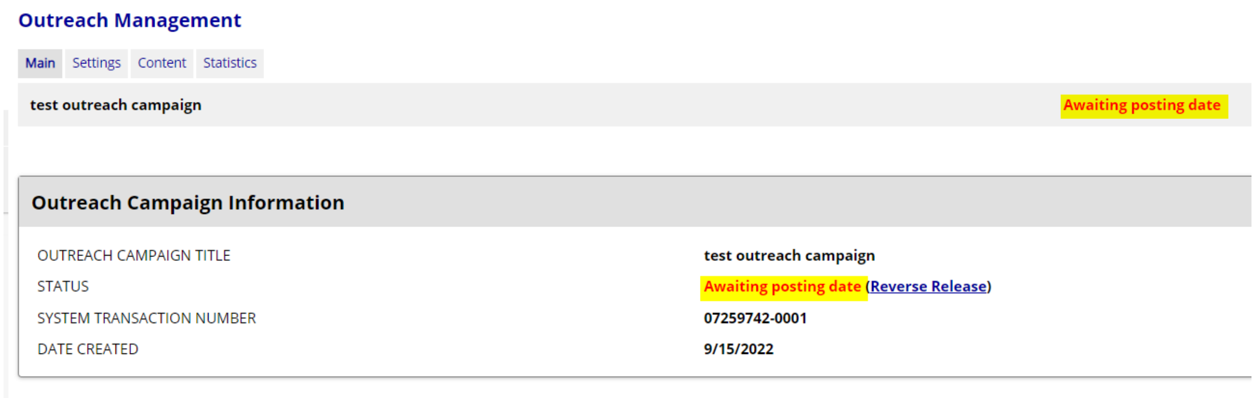
- Add **Comment / Label**



- Click **Add Vendors to Outreach Campaign**



- Return to **Main** tab



Contract Compliance Module Overview

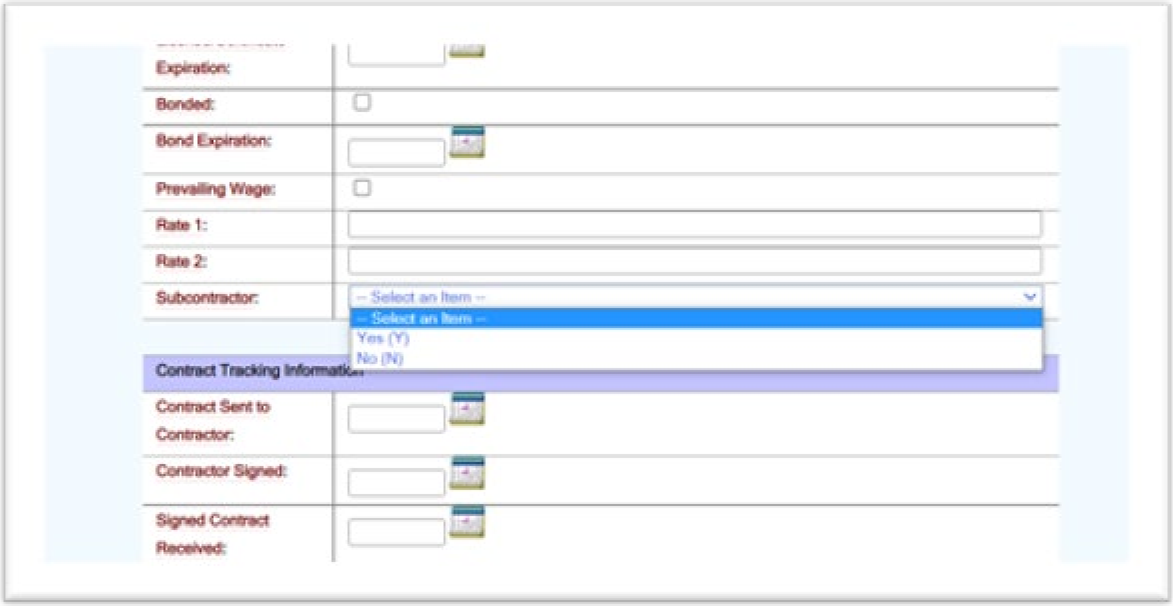
The Access Equity Contract Compliance Module is a statewide system that collects spend data from all Washington State Agencies and Educational Institutions for contracts that include subcontractors. OMWBE uses this data to monitor, report, and prepare policy recommendations for programs that promote the maximum practicable participation of certified businesses in state spending.

B2Gnow is the selected vendor for OMWBE certification and the Access Equity system. B2Gnow is also used by WSDOT and DES Public Works, and public sector entities within Washington State for collecting diversity participation data.

All contracts with subcontractors executed and direct buy purchases with subcontractors made under RCW 39.19 active as of July 1, 2023, will be entered into the system in accordance with RCW 39.19.250 and EO 22-01. Refer to What is Counted in the Report | Office of Minority and Women's Business Enterprises (wa.gov) for the types of contracts and purchases that are applicable

For DES Statewide Contracts, if a PO is issued with no additional internal contract language or SOW created, the purchase does not need to be recorded in Access Equity. If an internal contract or SOW is executed and references a statewide contract and has subcontractors, it must be entered into Access Equity.

If your organization uses DES' ECMS to track contracts, ensure the Subcontractor indicator is selected as Yes (Y) for all contracts with subcontractors.



Roles

Contract Agent

This role enters contract and vendor information into the Access Equity system. This role should be assigned to the following positions - Contracts Specialists, Procurement Specialists, Contract Managers, Program Managers, Contract Officers, Contracts Consultants.

Secondary Contract Agent

This role provides a separation of duties through quality assurance and quality control of Contract Records. This role monitors contract audits and data to guarantee accurate data is created and reported. This position could be assigned to a lead, supervisor, manager, or department director.

Responsibilities

Contract Agent

- Add new vendors.
- Create the Contract Record by entering all contracts that have subcontractors.
    - Required fields are marked with an asterisk [*].
    - Under Contract Settings, skip Diversity Goals
- Record payments made from Public Owner to Prime.
- Modify contracts as needed and instructed by Secondary Contract Agent.
- Can conduct Outreach activities.

Secondary Contract Agent – Quality Assurance/Quality Control

- Review B2Gnow **Contract Compliance** training video

    - **Help & Support >> Video Library** from left navigation bar
- Schedule monthly reports to review contracts for completeness and accuracy.
- Notify Contract Agent for Contract Record modifications as needed.
- Determine if contractor's genuine effort is being met. Including, but not limited to
    - Giving adequate lead time for bidding opportunities.
    - Searching the OMWBE database for minority- and women-owned businesses.
    - Posting to industry and community opportunity websites, including OMWBE's.
    - Completing a Subcontractor Inclusion Plan (SIP) with reasonable goals.
    - Consulting with OMWBE.
- Verification of payments made from Public Owner to Prime Contractor.
- Verification of payments from Prime Contractor to Subcontractor.
- Verification of Subcontractor confirmation on payment received from Prime.
- Verification of NAICS codes (best matches the work being done).
- Manage active contracts past end date.
- Close contracts as completed.
- Delete contracts as needed.
- Can conduct Outreach activities.

Account Administrator

- Two [2] administrator level roles to assigned to any internal job role to manage the issuance of Contract Agent, Secondary Contract Agent, and Outreach Manager accounts.
- Add and remove users.
- Ensure Access Equity training has been completed prior to adding new user.
- Familiarity with modules to provide basic support.
    - Escalate to OMWBE as needed.
- Delete Subcontractors from the contract record, as needed.
- Can conduct Outreach activities.

Procedure

Contract Record Creation Process

Subcontractor Inclusion Plan

- The Prime will submit a subcontractor inclusion plan with the bid proposal to the solicitation Contract Agent.
- Contract Agent will enter the goal from inclusion plan into Contract Record upon creation.
    - The same number goes into both Proposed/Committed Goal and Actual Goal fields.

Contract Entry

- Contract Agent will create the Contract Record within five [5] business days of awarding the contract to the Prime.
- Prime will enter the certified and non-certified subcontractors into Access Equity within fifteen [15] business days of Contract Record creation.
- Contract Agent will attach all relevant documents (Prime contract, subcontractor inclusion plan, statement of work, amendments, Et al.) to the Contract Record.

Subcontracts

- Public Owner may choose to add Subcontractor[s] to the Contract Record themselves or have the Prime enter.
- Secondary Contract Agent will review all subcontracts and purchase order documents for compliance.
    - If approved, Secondary Contract Agent will notify Contract Agent of subcontract submittal approval.
    - If not approved, Secondary Contract Agent will notify Contract Agent to have Prime correct and resubmit.
- Prime will enter all Subcontractor[s] into Access Equity. Contract Agent will review all entry information to confirm counting of subcontractor inclusion plan.
    - Non-certified entries will generate approval flag 'New Record Alert' that Secondary Contract Agent must clear.
    - Secondary Contract Agent will confirm completion of Subcontractor review process prior to the approval of the first payment application and as additional Subcontractor[s] are added to the Contract Record.
- Secondary Contract Agent will confirm Prime has entered all Subcontractor[s] within twenty [20] business days of Contract Record creation.
    - If not entered, Secondary Contract Agent will contact Contract Agent to notify the Prime of failure to comply with contract terms (Sample Contract Language).

Payments

- Prime and Subcontractor[s] will complete two [2] one-hour online Introduction to the System and Contract Compliance Reporting training videos in Access Equity (Help & Support → Video Library → Core Training – Vendor) within twenty [20] business days of Contract Record creation and prior to the approval of the invoice.
    - This training is available at no cost to Prime or Subcontractor[s].
- Prime will submit invoice to the Contract Agent with all applicable documentation attached.
    - Contract Agent will process payment in line with department requirements to pay Prime.
        - Automatic notification will be sent to Prime that payment was made.
- Prime will enter amount of payment received and amount paid to Subcontractor[s].

    - If no payment is received in a given month, Prime enters $0 into monthly audit.
    - Subcontractor[s] will receive an email from Access Equity requesting 'quick confirm' they received payment, agree with amount and prompt payment terms.
        - If Subcontractor[s] agree, they will confirm in Access Equity.
        - If Subcontractor[s] does/do not agree with amount reported or date of payment, they will reject confirmation which generates a discrepancy notice sent to Contract Agent. Contract Agent will work with Secondary Contract Agent to resolve.
        - For $0 payment entries to Subcontractor[s] by Prime, Access Equity will auto-confirm – no email will be sent to Subcontractor[s].
        - NOTE: Subcontractor[s] must repeat payment entry and confirmation steps for all tiers.
    - Contract Agent monitors compliance of Prime and Subcontractor reporting through Contract Record Monitoring.

Contract Record Monitoring

- Contract Record Monitoring is performed monthly by Secondary Contract Agent to ensure contract compliance and reduce outstanding compliance reporting issues at end of project.
- Secondary Contract Agent will monitor the following:
    - Prime entered all Subcontractor[s].
    - Subcontractor[s] entered lower-tier Subcontractor[s] into Contract Record and confirm all approved certified businesses are receiving proper credit, including Prime.
    - Prime Prompt Payments – within 30 days of Public Owner payment.
    - Subcontractor payment confirmations.

Contract Modifications

- Secondary Contract Agent will identify needed modifications during monthly audit and notify Contract Agent to modify Contract Record.
    - Common reasons for modifications are:
        - Change orders.
        - Fee revisions.
        - Changes in subcontract value.
        - Substitution or deletion of subcontractor[s].
    - Contract Agent will work with Prime to identify any impacts modifications may have to M/WBE inclusion plan and to Subcontractor[s] participation.
        - If inclusion plan changes, Contract Agent will notify Secondary Contract Agent for approval.
        - If subcontracts require modification, Contract Agent will notify Prime to submit information detailing changes and Contract Agent will modify subcontract Contract Record accordingly.

        - For changes not requiring a change order [e.g. Prime must replace Subcontractor[s] due to non-performance], Prime will submit information detailing change and Contract Agent will notify Secondary Contract Agent to review and modify Contract Record.
        - For changes due to data entry errors, Contract Agent may revise payment amount received by Prime and Secondary Contract Agent will make corrections in Contract Record for all Subcontractor[s].

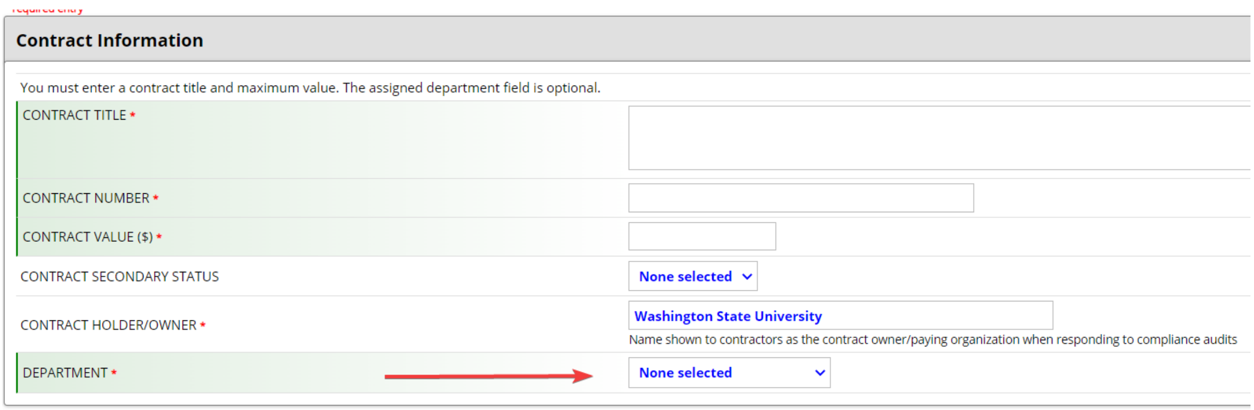
Contract Record Closeout

- Access Equity Contract Record Closeout process includes:
    - Confirming record is complete.
    - All final payments are entered and confirmed by Subcontractor[s].
    - Contract Record is closed out by Secondary Contract Agent.
- Prime will compile and submit final invoice to Contract Agent.
- Contract Agent will review Contract Record when processing final invoice and work with Prime to resolve any outstanding issues.
    - Subcontractor[s] will submit final invoice to Prime.
- Contact Agent reviews the following:
    - Ensure contract number matches.
    - Ensure all Subcontractor payments are confirmed.
        - Prime to contact Subcontractor[s] to confirm payments.
    - Confirm all subcontracts have been approved by Secondary Contract Agent.
    - Confirm all ‘New Record Alerts’ have been cleared.
    - Confirm all Subcontractor[s] have confirmed payment[s].
    - Confirm Prime achieved inclusion plan.
        - If not, work with Secondary Contract Agent to resolve failure to comply with contract terms.
    - Confirm Access Equity audit summary report is attached to final invoice.
- Contract Agent will complete payment application and submit it through state financial system for processing.
    - Department Director [or designee] and Secondary Contract Agent will review and work with Contract Agent to resolve identified issues.
- After final payment is processed, Secondary Contract Agent will monitor Contract Record to ensure Prime and Subcontractor[s] complete final payment entries in Access Equity.
    - Once complete, Secondary Contract Agent will close Contract Record.

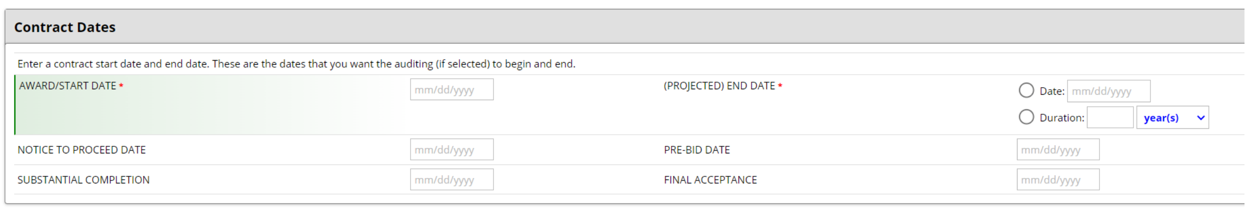
Contract Compliance Module Navigation

Create New Contract

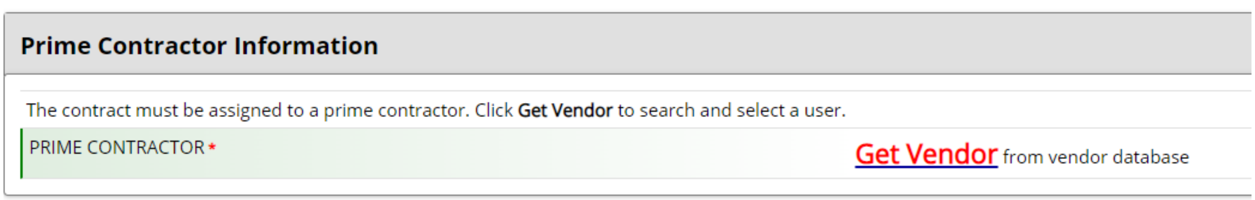
- **Create >> New Contract** from left navigation bar



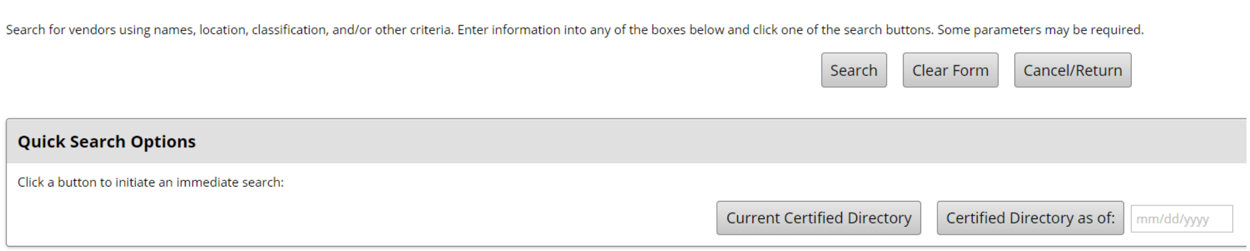
- Enter **CONTRACT TITLE**
- Enter **CONTRACT NUMBER**
- Enter **CONTRACT VALUE**
- **CONTRACT HOLDER/OWNER** is pre-selected for your agency/institution
- Select **DEPARTMENT** from drop-down menu



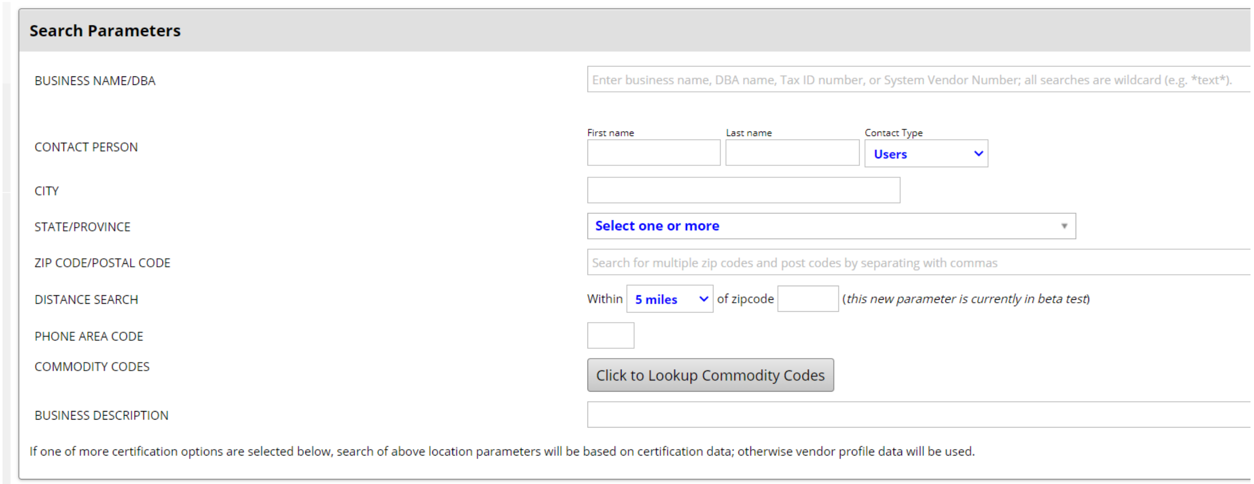
- Enter **AWARD/START DATE**
- Enter **[PROJECTED] END DATE**
- Other fields are optional and can be used as needed



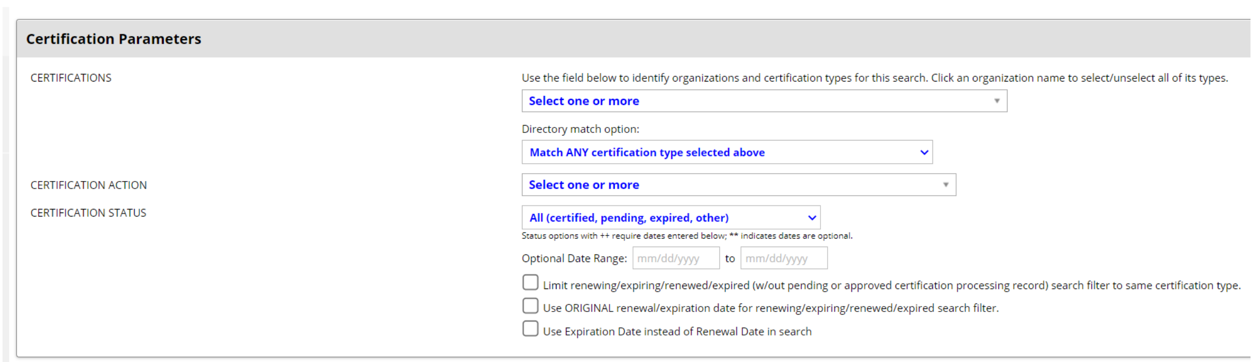
- Add **PRIME CONTRACTOR**
- Click **Get Vendor** link



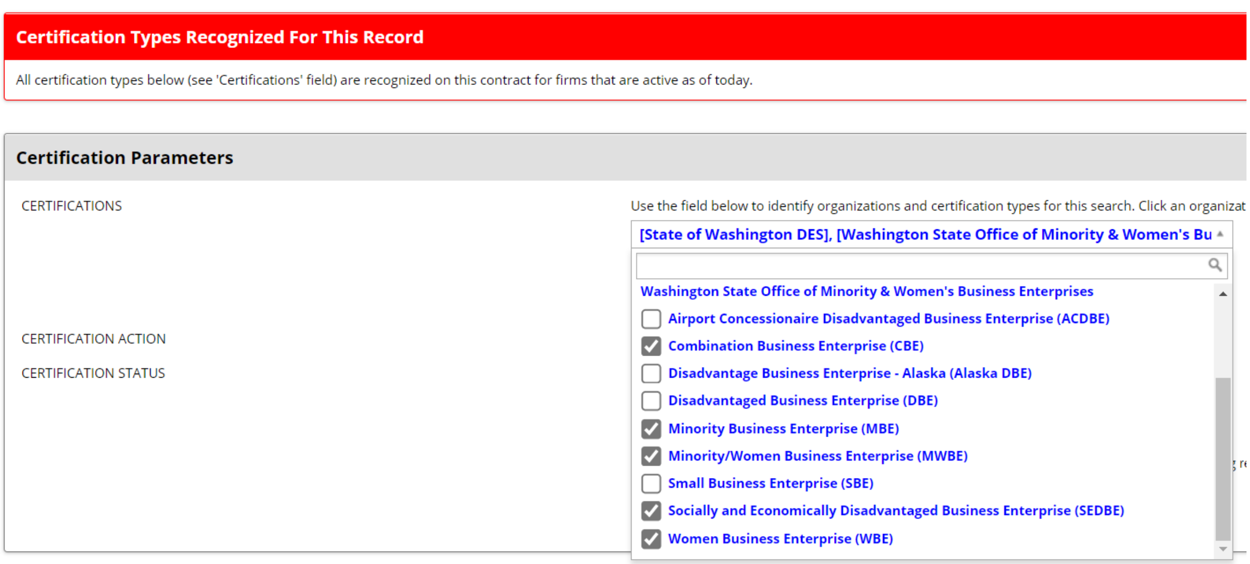
- Search by **Certified Directory**



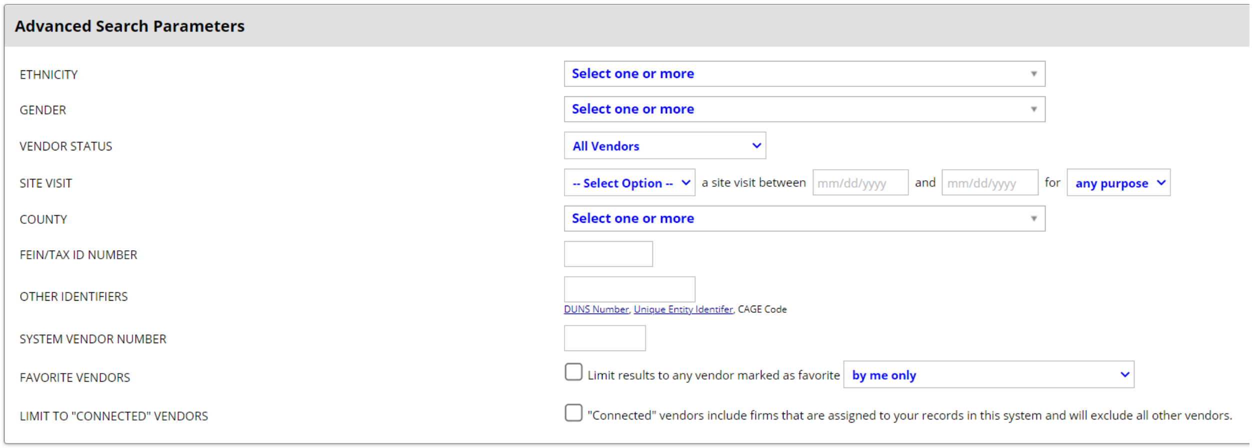
- By specific **Search Parameters**



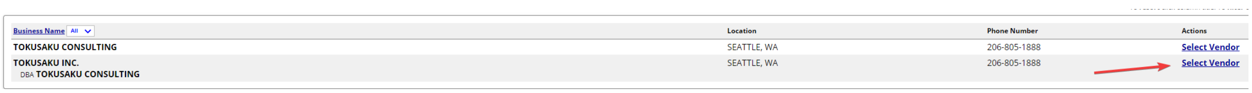
- By **Certification Parameters**



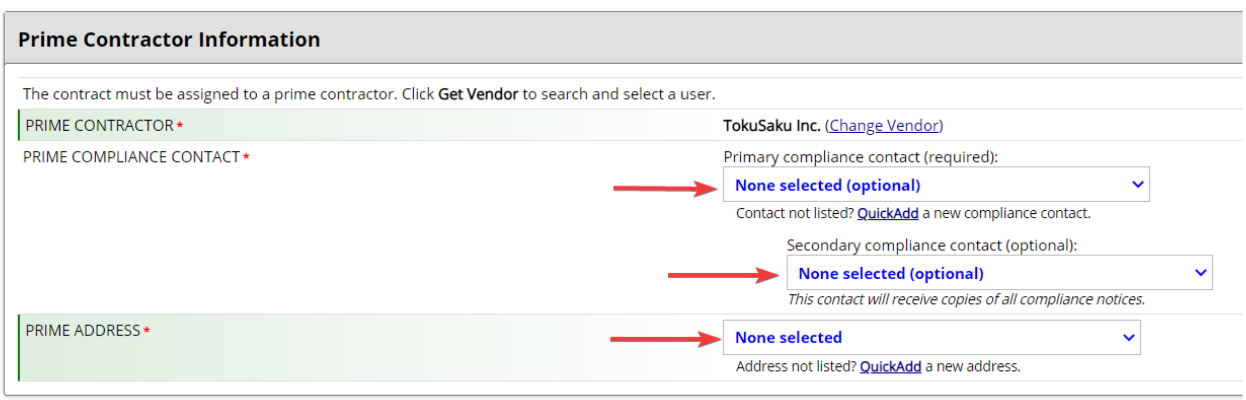
- For OMWBE state certification select:
    - Combination Business Enterprise [CBE]
    - Minority Business Enterprise [MBE]
    - Minority/Women Business Enterprise [MWBE]
    - Socially and Economically Disadvantaged Business Enterprise [SEDBE]
    - Women Business Enterprise [WBE]



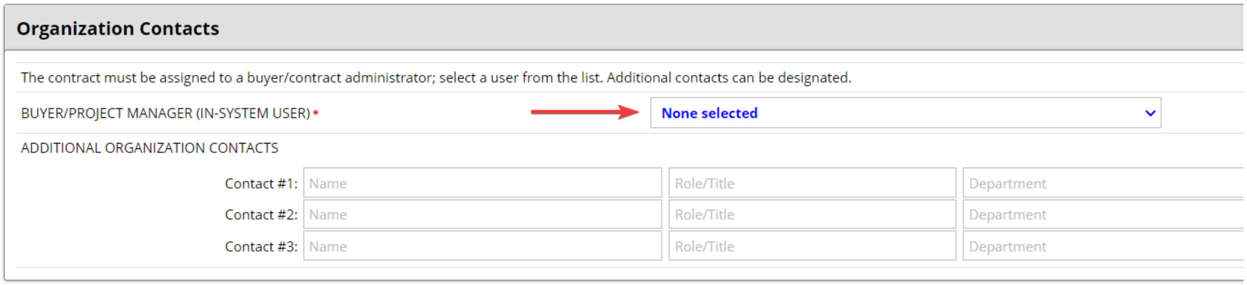
- By **Advanced Search Parameters**



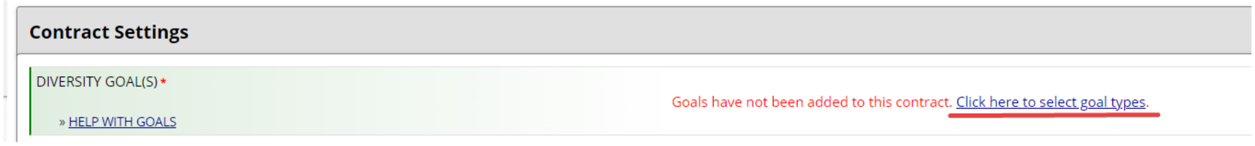
- **Select Vendor**



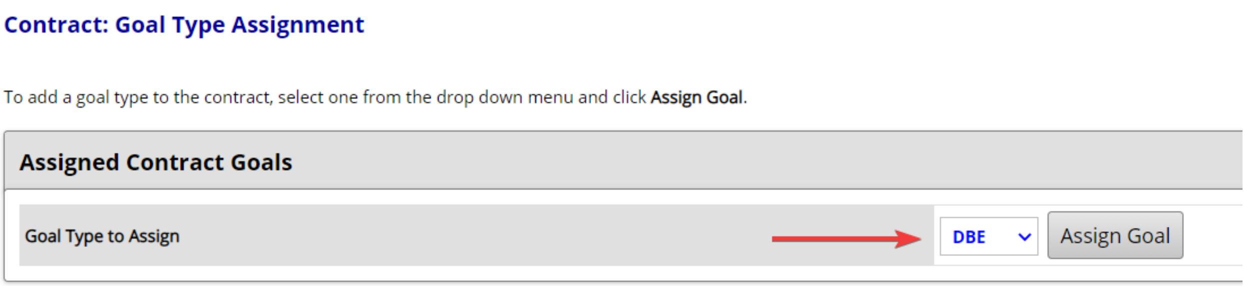
- Select **PRIME CONTRACTOR** from drop-down menu
- Select **COMPLIANCE CONTACT** from drop-down menu
- Select **PRIME ADDRESS** from drop-down menu



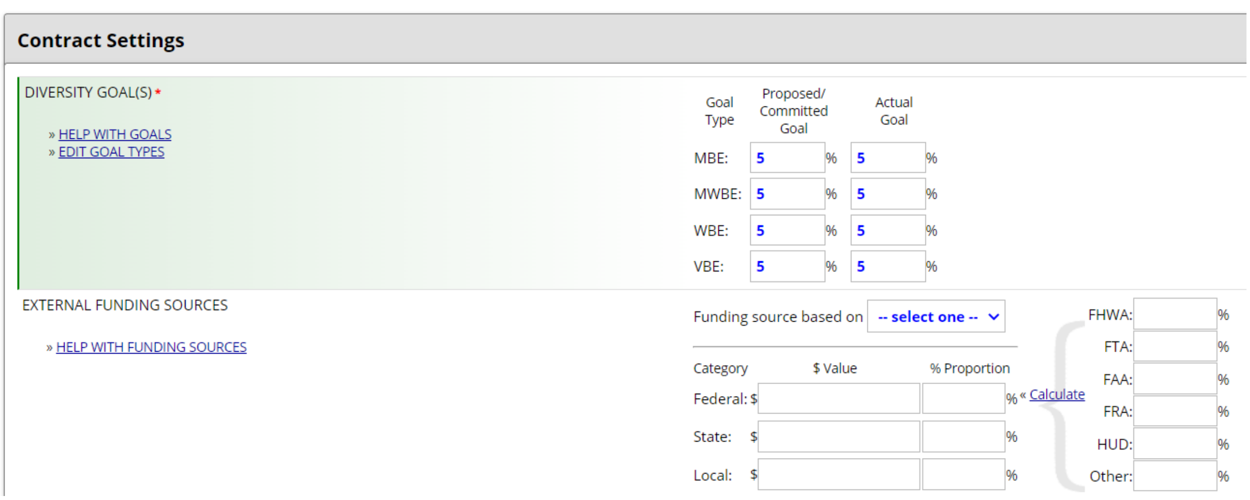
- Select **BUYER/PROJECT MANAGER [IN-SYSTEM USER]**
  - Contact your agency/institution Administrator to add new users.



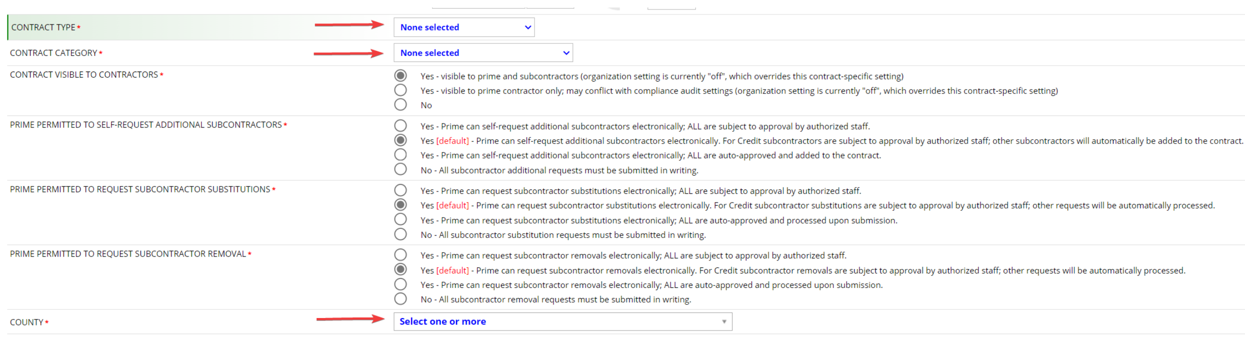
- Click the link **to select goal types.**



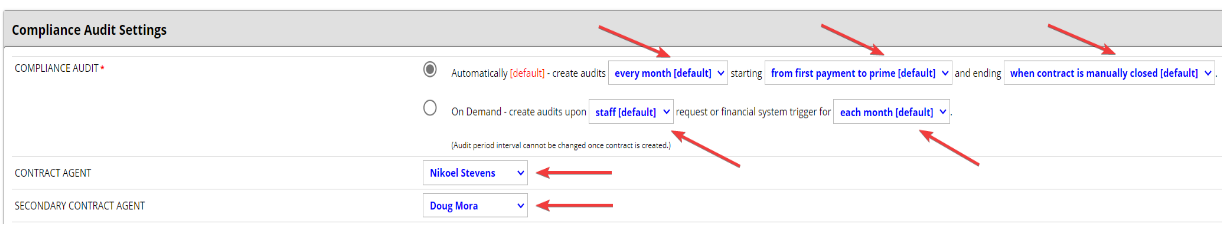
- Select the goal that matches the subcontractor's certification from drop-down menu.
- Add each goal from contract inclusion plan.
- Click **Return**



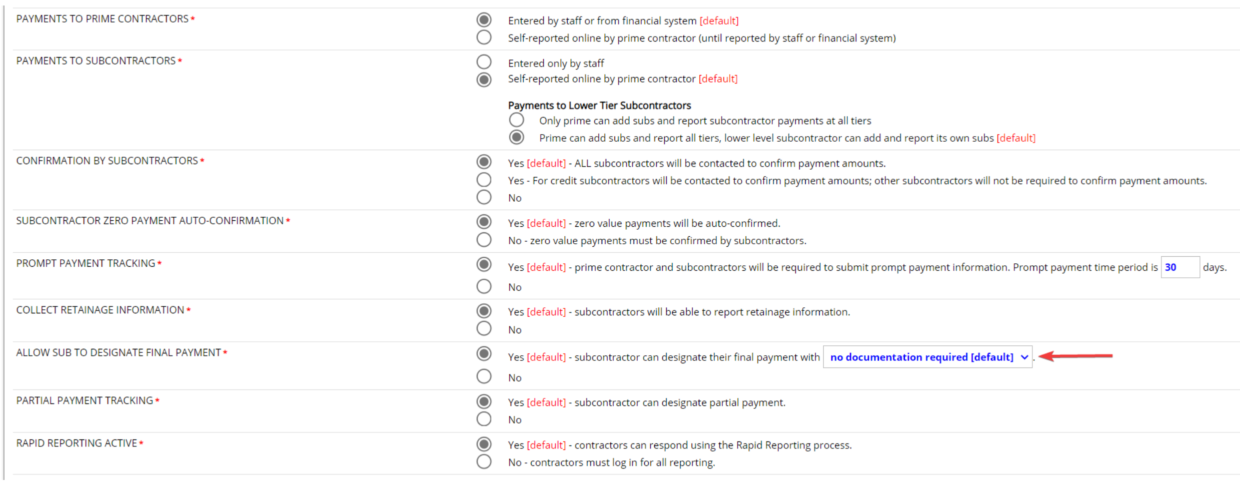
- **Proposed/Committed Goal -** Enter percentages from contract inclusion plan**.**
- **Actual Goal –** Enter same value(s) entered in **Proposed/Committed Goal**.
- **EXTERNAL FUNDING SOURCES –** use as required by your organization.



- Select **CONTRACT TYPE**
- Select **CONTRACT CATEGORY**
- Choose options for [defaults recommended]
  - **PRIME PERMITTED TO SELF-REQUEST ADDITIONAL SUBCONTRACTORS**
  - **PRIME PERMITTED TO REQUEST SUBCONTRACTOR SUBSITITUTIONS**
  - **PRIME PERMITTED TO REQUEST SUBCONTRACTOR REMOVAL**
- Select **COUNTY**

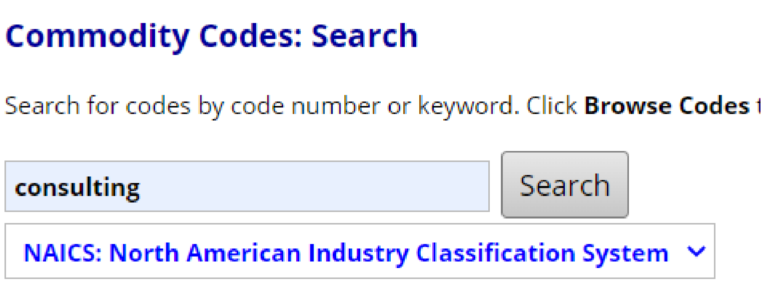


- **COMPLIANCE AUDIT** [defaults recommended]
  - Automatically create audits **every month** [recommended]
  - Starting from **first payment to prime** [other options as preferred]
    - Immediately
    - From award start date
    - From notice to proceed date
  - And **ending when contract is manually closed** [required]
  - NOTE: Audit period interval cannot be changed after contract is created. Contract can be canceled up until first payment made.
- **CONTRACT AGENT** – auto populated as person creating Contract Record
- Select **SECONDARY CONTRACT AGENT –** select based on internal process

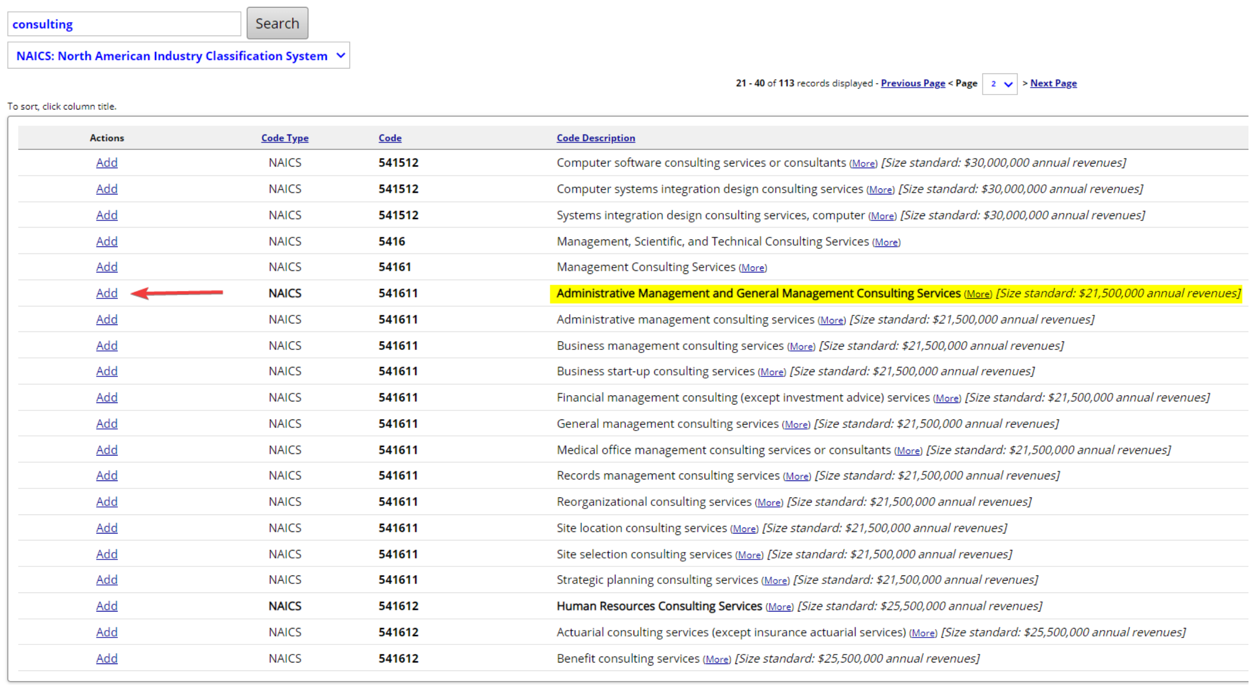


- Choose options for remaining **Compliance Audit Settings**:
    - **PAYMENTS TO PRIME CONTRACTORS** [default recommended]
    - **PAYMENTS TO SUBCONTRACTORS** [default recommended]
        - **Payments to Lower Tier Subcontractors** [default recommended]
    - **CONFIRMATION BY SUBCONTRACTORS** [default required]
    - **SUBCONTRACTOR ZERO PAYMENT AUTO-CONFIRMATION** [default recommended]
    - **PROMPT PAYMENT TRACKING** [default required – adjust interval as needed]
    - **COLLECT RETAINAGE INFORMATION** [default required – only applies to Public Works contracts – if not Public Works contract, select ‘No’]
    - **ALLOW SUB TO DESIGNATE FINAL PAYMENT** [default required]
    - **PARTIAL PAYMENT TRACKING** [default recommended]
    - **RAPID REPORTING ACTIVE** [default recommended]

- **Add Commodity Codes**

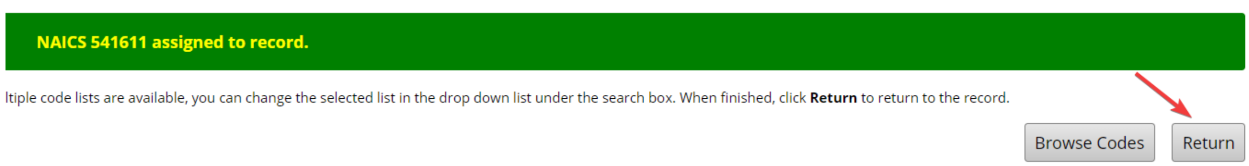


- **Search** code or keyword

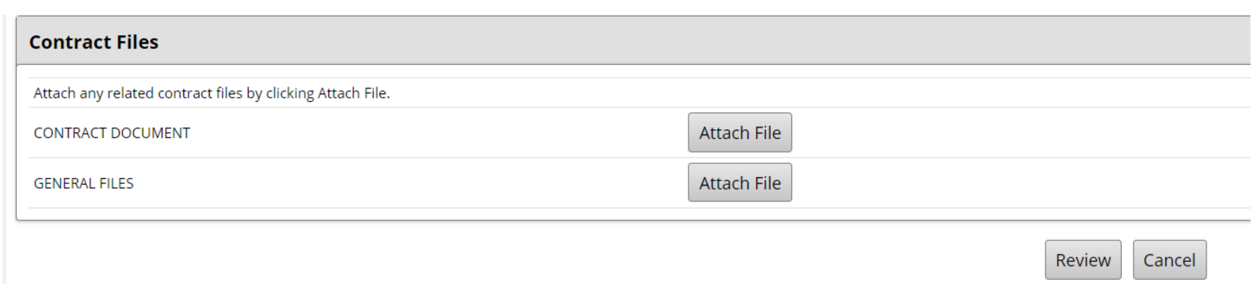


Actions	Code Type	Code	Code Description
Add	NAICS	541512	Computer software consulting services or consultants (More) [Size standard: $30,000,000 annual revenues]
Add	NAICS	541512	Computer systems integration design consulting services (More) [Size standard: $30,000,000 annual revenues]
Add	NAICS	541512	Systems integration design consulting services, computer (More) [Size standard: $30,000,000 annual revenues]
Add	NAICS	5416	Management, Scientific, and Technical Consulting Services (More)
Add	NAICS	54161	Management Consulting Services (More)
Add	NAICS	541611	Administrative Management and General Management Consulting Services (More) [Size standard: $21,500,000 annual revenues]
Add	NAICS	541611	Administrative management consulting services (More) [Size standard: $21,500,000 annual revenues]
Add	NAICS	541611	Business management consulting services (More) [Size standard: $21,500,000 annual revenues]
Add	NAICS	541611	Business start-up consulting services (More) [Size standard: $21,500,000 annual revenues]
Add	NAICS	541611	Financial management consulting (except investment advice) services (More) [Size standard: $21,500,000 annual revenues]
Add	NAICS	541611	General management consulting services (More) [Size standard: $21,500,000 annual revenues]
Add	NAICS	541611	Medical office management consulting services or consultants (More) [Size standard: $21,500,000 annual revenues]
Add	NAICS	541611	Records management consulting services (More) [Size standard: $21,500,000 annual revenues]
Add	NAICS	541611	Reorganizational consulting services (More) [Size standard: $21,500,000 annual revenues]
Add	NAICS	541611	Site location consulting services (More) [Size standard: $21,500,000 annual revenues]
Add	NAICS	541611	Site selection consulting services (More) [Size standard: $21,500,000 annual revenues]
Add	NAICS	541611	Strategic planning consulting services (More) [Size standard: $21,500,000 annual revenues]
Add	NAICS	541612	Human Resources Consulting Services (More) [Size standard: $25,500,000 annual revenues]
Add	NAICS	541612	Actuarial consulting services (except insurance actuarial services) (More) [Size standard: $25,500,000 annual revenues]
Add	NAICS	541612	Benefit consulting services (More) [Size standard: $25,500,000 annual revenues]

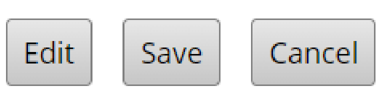
- **Add** appropriate NAICS code(s)



- **Return** to Contract Record



- Click **Attach File** – attach all relevant contract files
  - **CONTRACT DOCUMENT**
  - **GENERAL FILES**
- Click **Review**

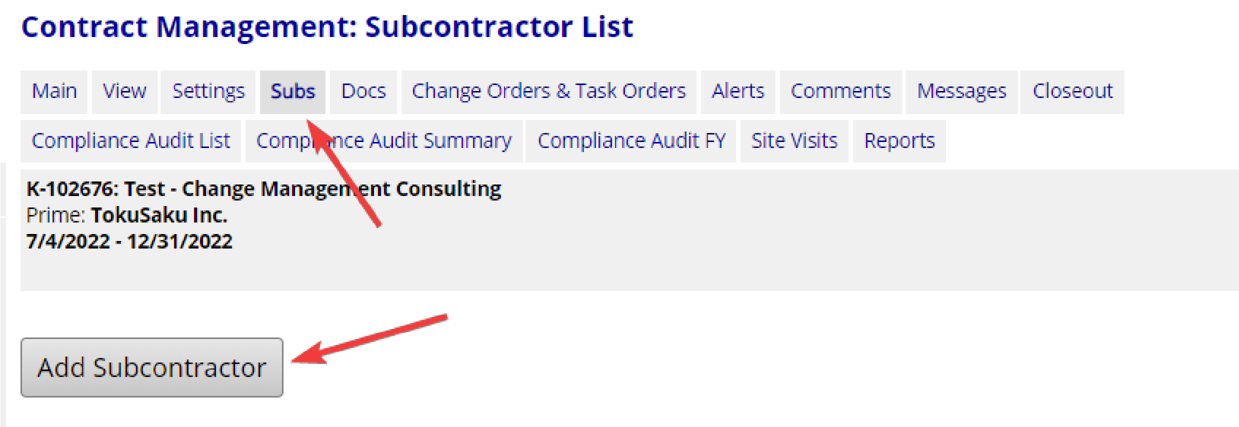


- Click **Edit**, **Save**, or **Cancel** depending on review.

Add Subcontractor

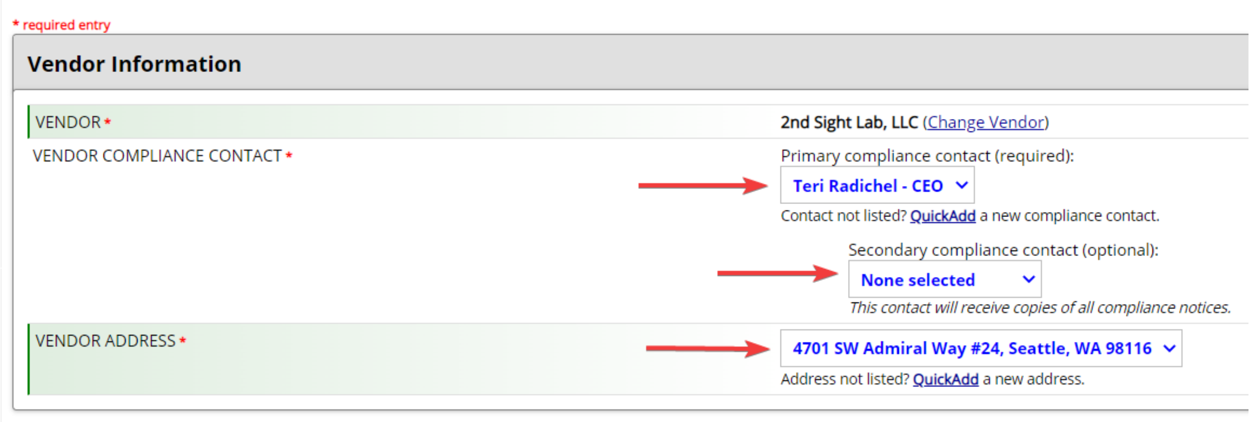
Recommendation: Have Prime contractor add subcontractor(s).

See [Prime Contractor Guide].



- From **Subs** tab, click **Add Subcontractor**

- **Get Vendor**
- Use same search instructions for adding [Prime] contractor



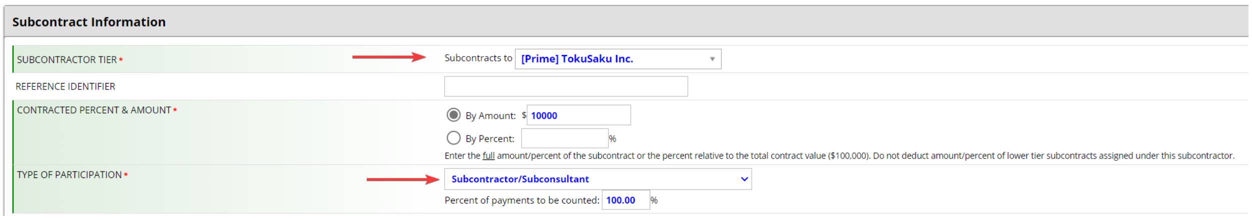
- Select **VENDOR** from drop-down menu

- Select **VENDOR COMPLIANCE CONTACT** from drop-down menu
- Select **VENDOR ADDRESS** from drop-down menu

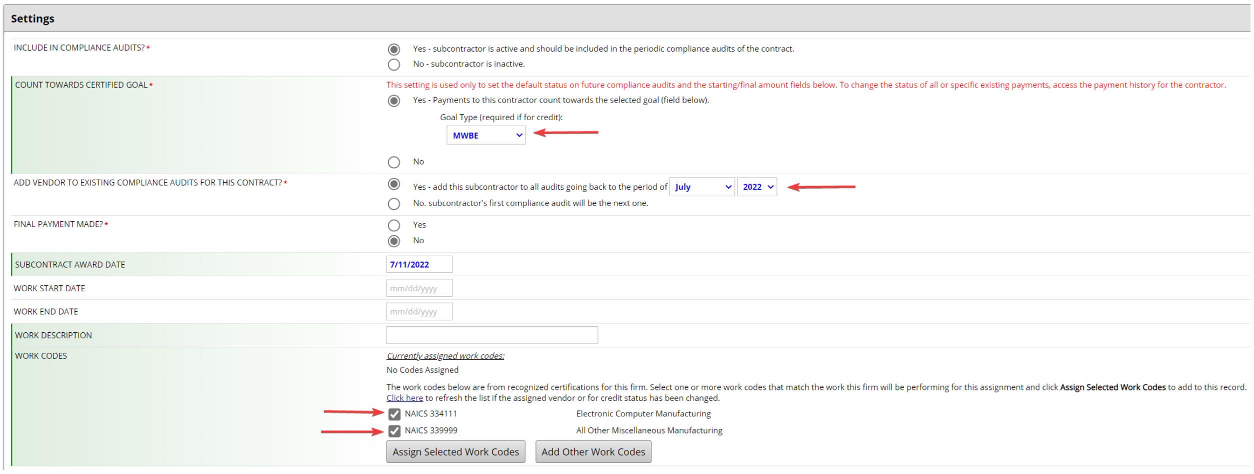
Applicable Vendor Certifications

Type	Effective	Renewal	Organization
WBE	6/23/2020	6/23/2023	Washington State Office of Minority & Women's Business Enterprises

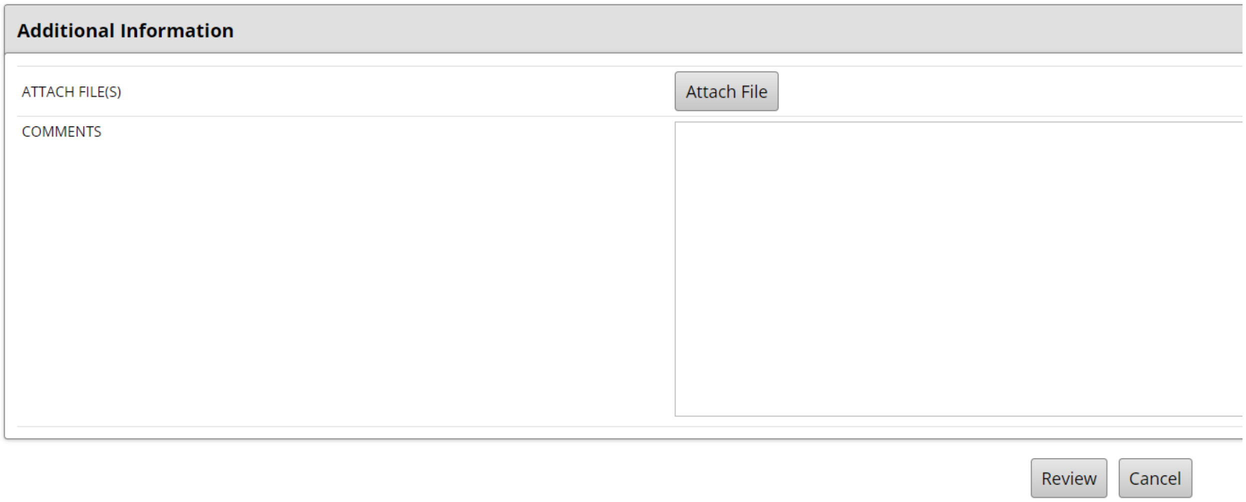
- Verify certification is current
    - Renewal date should be in the future.
    - Contact subcontractor [or have Prime contact] to have them verify their OMWBE certification if Renewal date has passed.



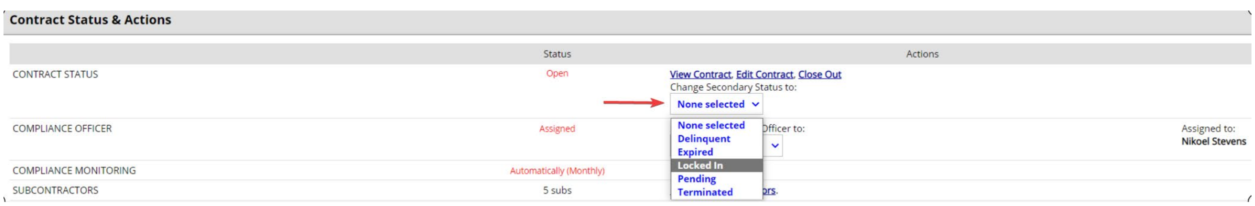
- Select **SUBCONTRACT TIER** to assign subcontractor to:
    - Prime.
    - Tier 1,2,3, etc.
- Select **TYPE OF PARTICIPATION**
    - Most common will be **Subcontractor/Subconsultant**.
    - Prime should be added as **Self-Performing Prime Contractor** if they are doing a portion of the work.
    - **Joint Venture** - only certified person's participation will count.
    - **Supplies Regular Dealer** - 60% credit is federal regulation.
    - Add **Self-Performing Prime** – if certified, to count up to certain $/%
- **STARTING PAID TO DATE AMOUNT** – Do not use.
- **FINAL AMOUNT ADJUSTMENT/PAID RETAINAGE**



- **INCLUDE IN COMPLIANCE AUDITS?**
  - Select **Yes**.
  - **COUNT TOWARDS CERTIFIED GOAL –** certified businesses only (select **No** for non-certified)
    - Select **Yes**
      - Select **Goal** Type from drop-down menu for desired goal type.
        - State certifications:
          - MBE – Owned by minorities.
          - WBE – Owned by non-minority women.
          - MWBE – Owned by minority women.
          - CBE – Owned by women and minorities.
          - SEDBE – owned by non-minority men who are found to be socially and economically disadvantaged on a case-by-case basis.
- Select all applicable NAICS codes
  - If visible codes are correct, click **Assign Selected Work Codes**.
  - If additional codes are needed, click **Add Other Work Codes**.



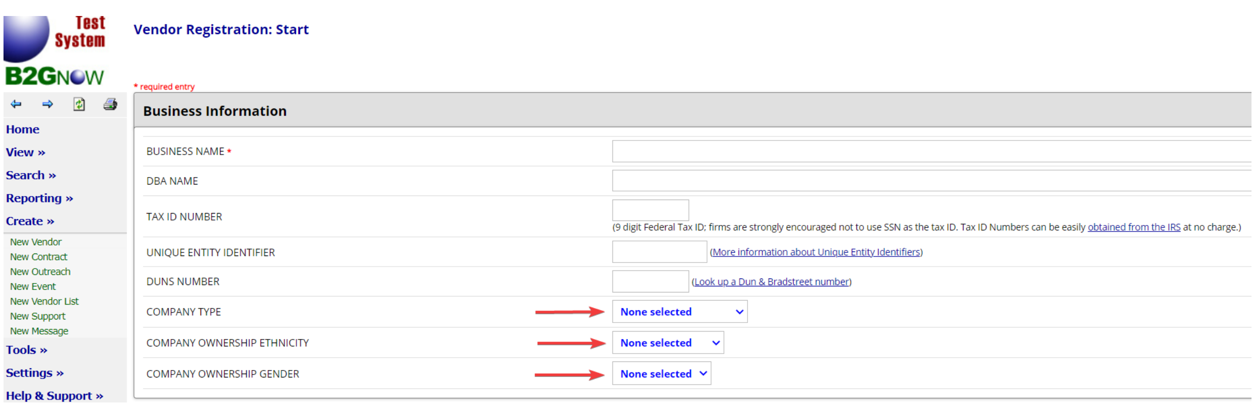
- Click **Attach File** to add any relevant files to record.
- Click **Review**
- Click **Save** if everything is accurate or **Save & Print Award Letter,** as needed**.**



- Once subcontractors have been added and all edits made, select **Locked In** from drop-down menu under **CONTRACT STATUS**.

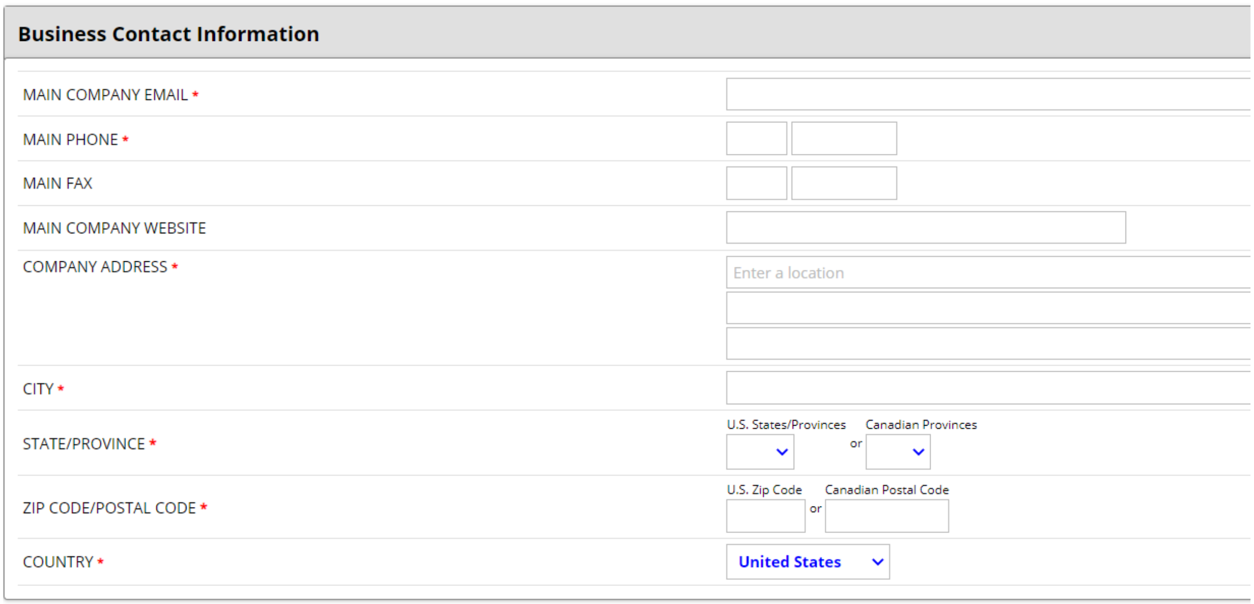
Add New Vendor

- Select **Create >> New Vendor** from the left navigation bar

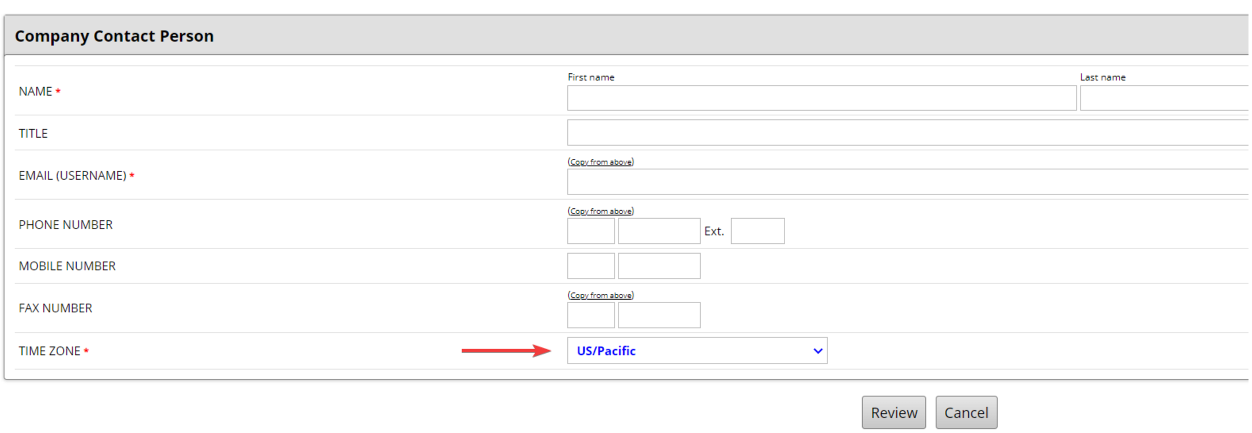


- Enter **BUSINESS NAME**
- Enter **DBA**, if applicable
- Enter **TAX ID NUMBER**

- Leave blank and direct vendor to add these values themselves if they wish.
    - **COMPANY TYPE**
    - **COMPANY OWNERSHIP ETHNICITY**
    - **COMPANY OWNERSHIP GENDER**

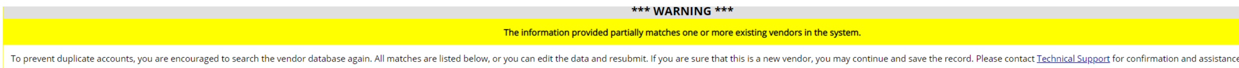


- Enter **MAIN COMPANY EMAIL**
- Enter **MAIN PHONE**
- Enter **COMPANY ADDRESS**
- Enter **CITY**
- Enter **STATE**
- Enter **ZIP CODE**



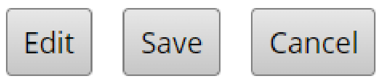
- Enter contact **NAME** – First and Last

- Enter **EMAIL** – this will be their username
- Select **TIME ZONE** from drop-down
- Click **Review**



The system will check for matches and present a red or yellow alert.

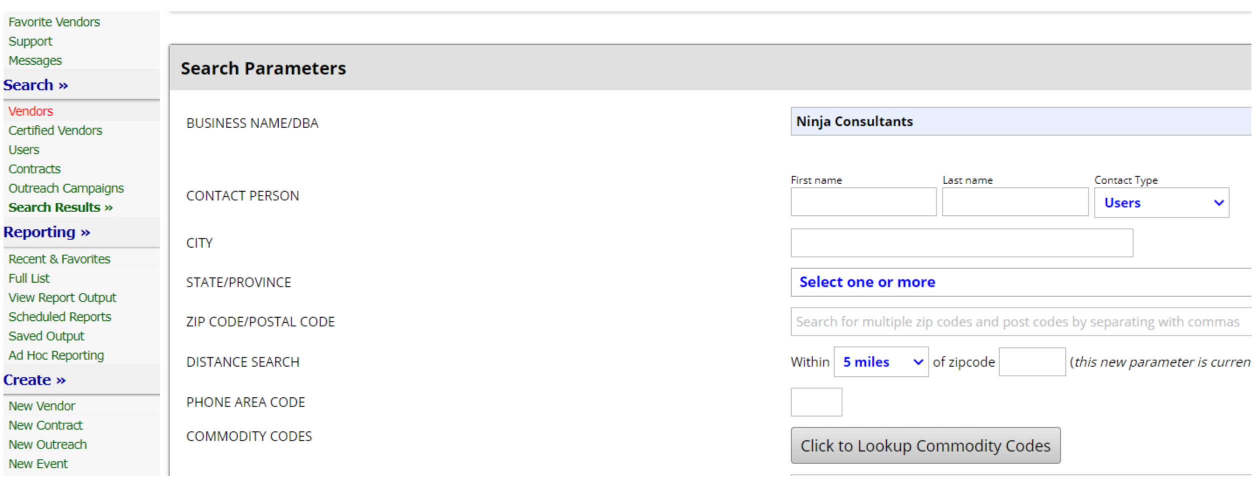
- Red alert – exact match
- Yellow alert – soft match
    - Review matches and verify if vendor is already in the system.



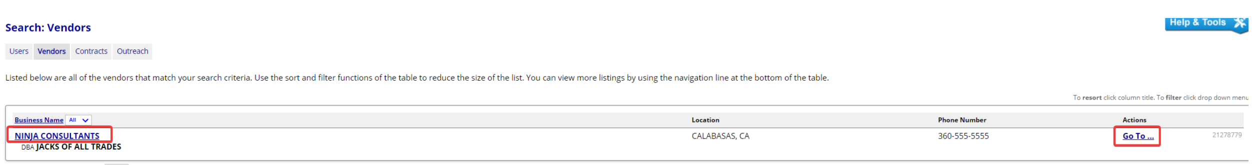
- Click **Edit**, **Save**, or **Cancel** depending on review.

Send Username to New Vendor and Reset Password

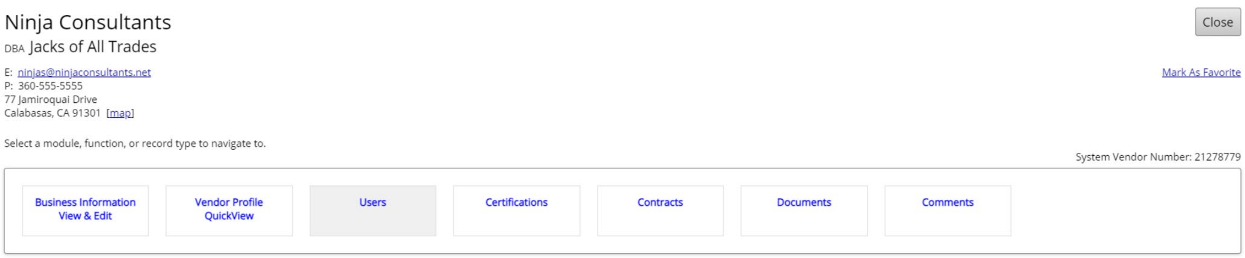
- Find vendor in **Search >> Vendors** from left navigation bar



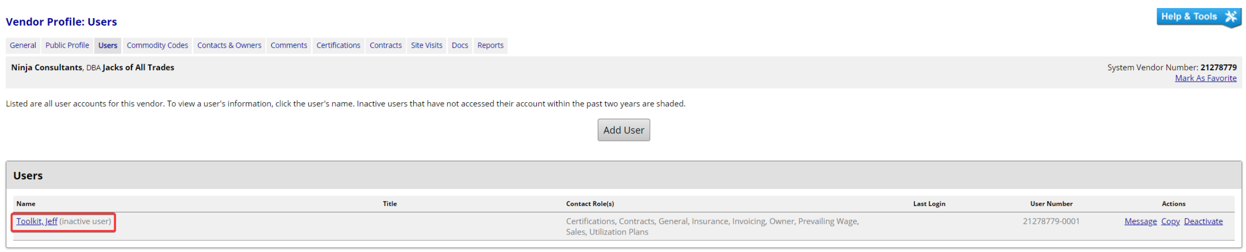
- Enter the vendor name and click **Search**



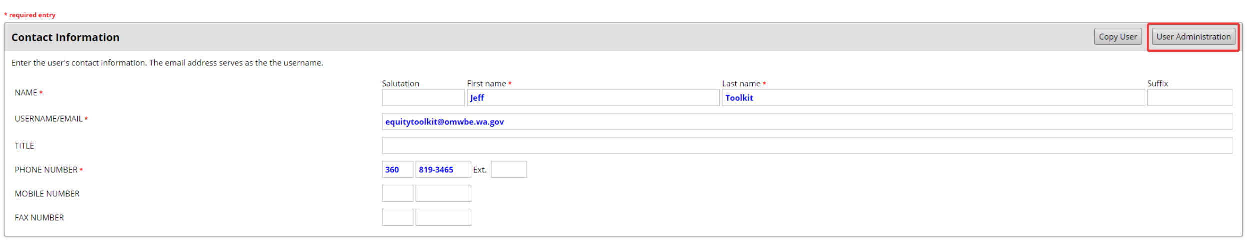
- Select either link of business name or **Go To…**



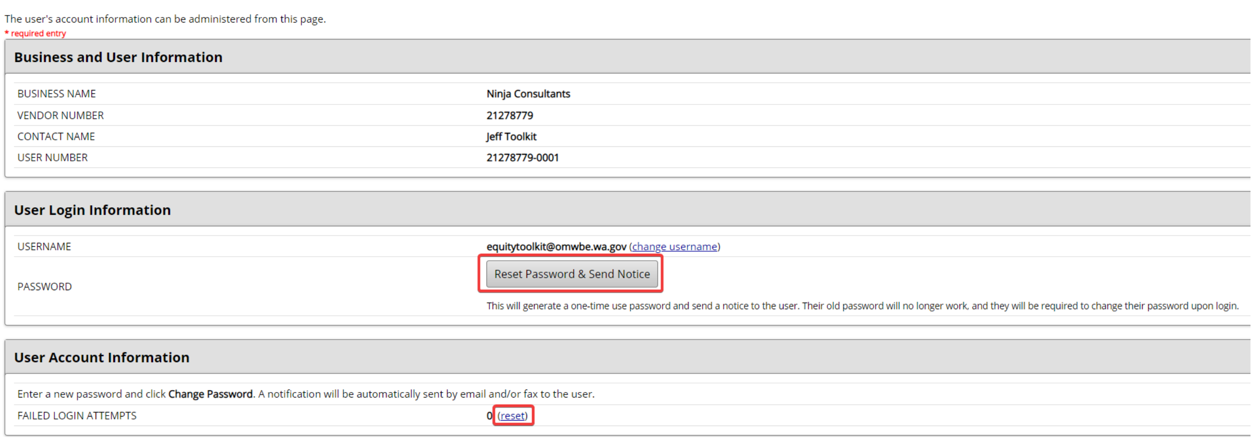
- Select **Users**



- Click the link of the user's name

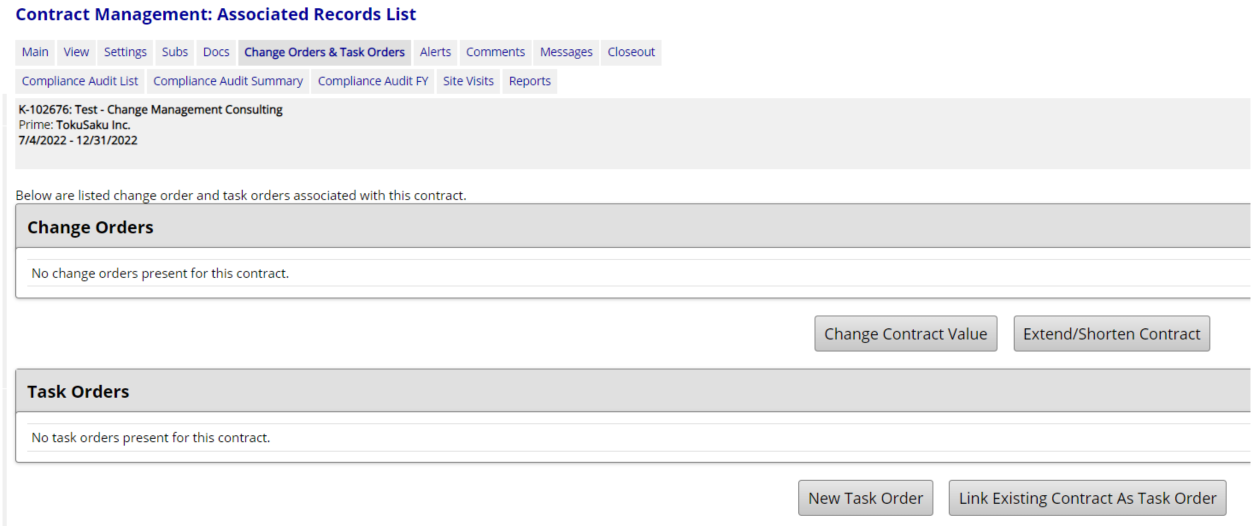


- Click **User Administration**

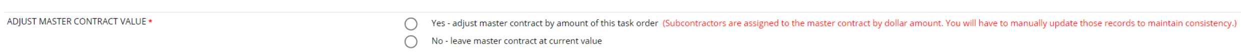


- Click **Reset Password & Send Notice**

Change Orders & Task Orders

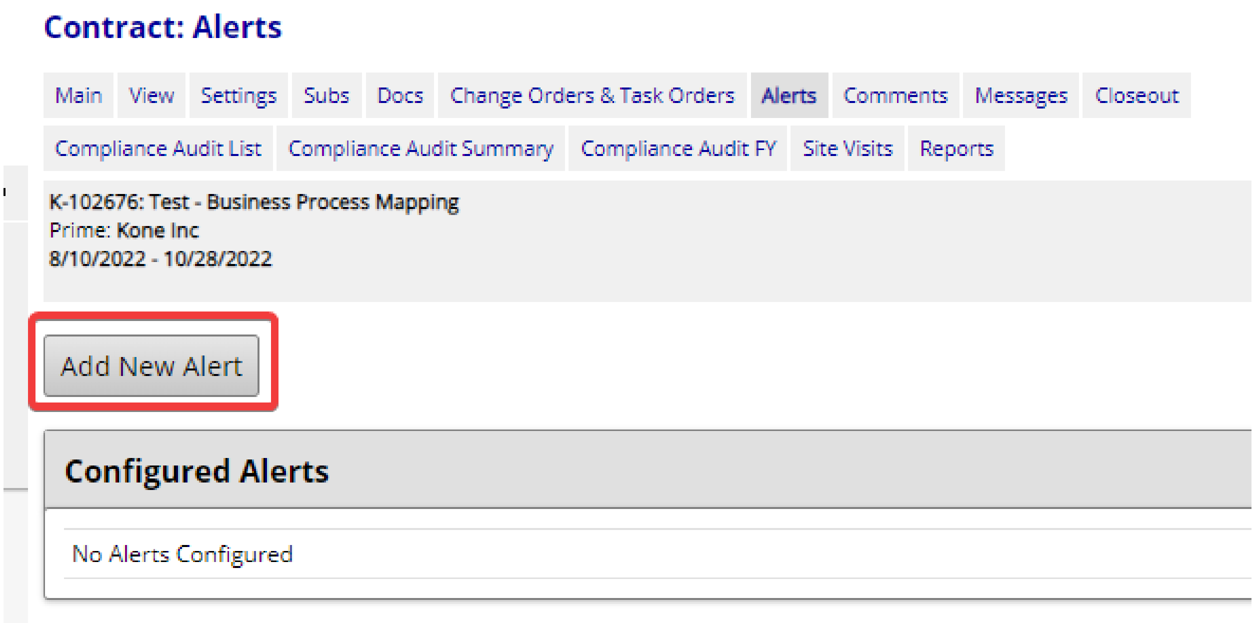


- **Change Orders**
  - **Change Contract Value**
    - Make necessary contract value updates
  - **Extend/Shorten Contract**
    - Update Contract end date as needed
- **Task Orders**
  - **New Task Order**

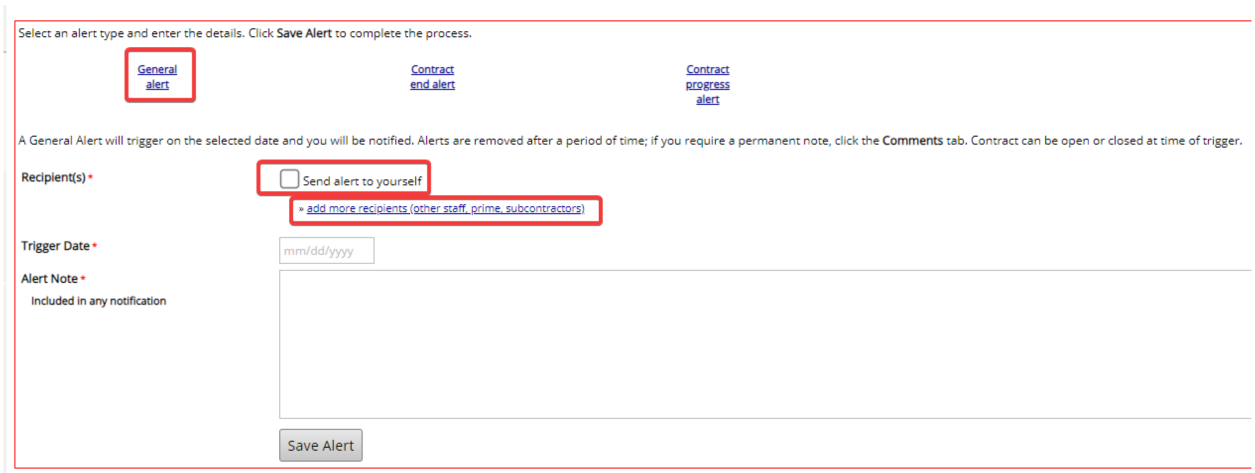


  - **Link Existing Contract As Task Order**
    - Search for contract to link

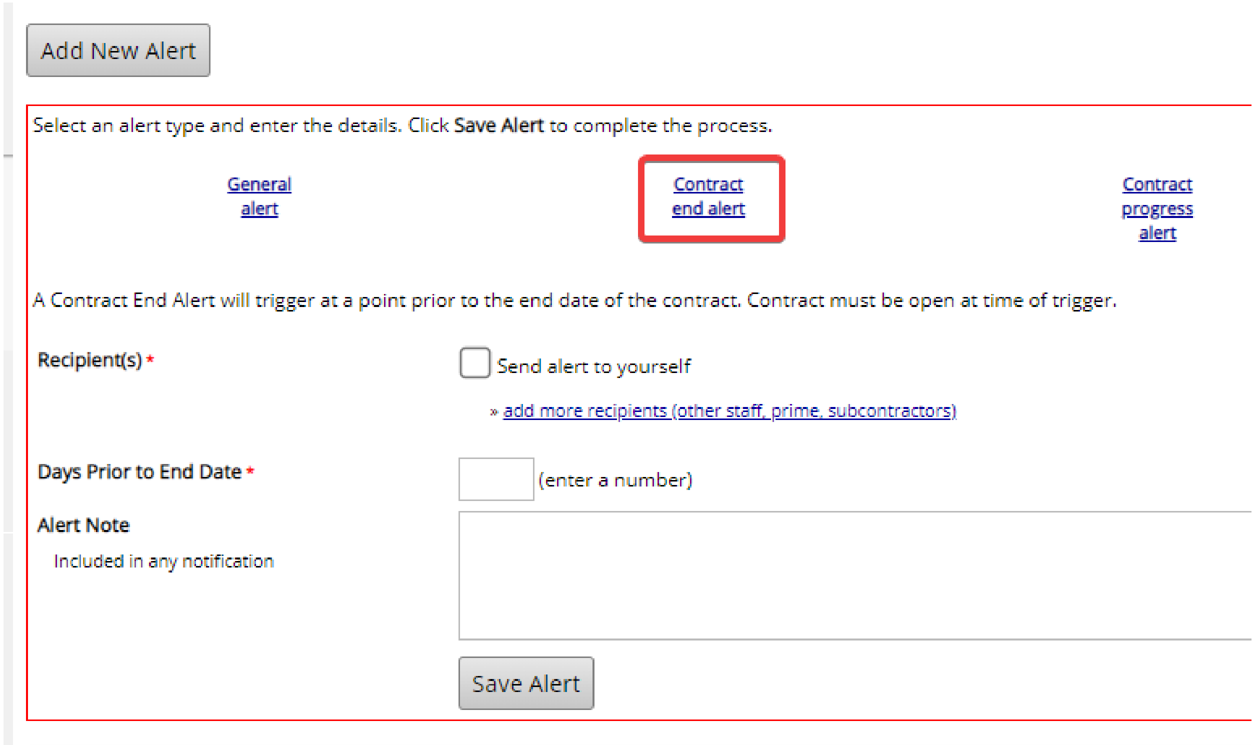
Alerts



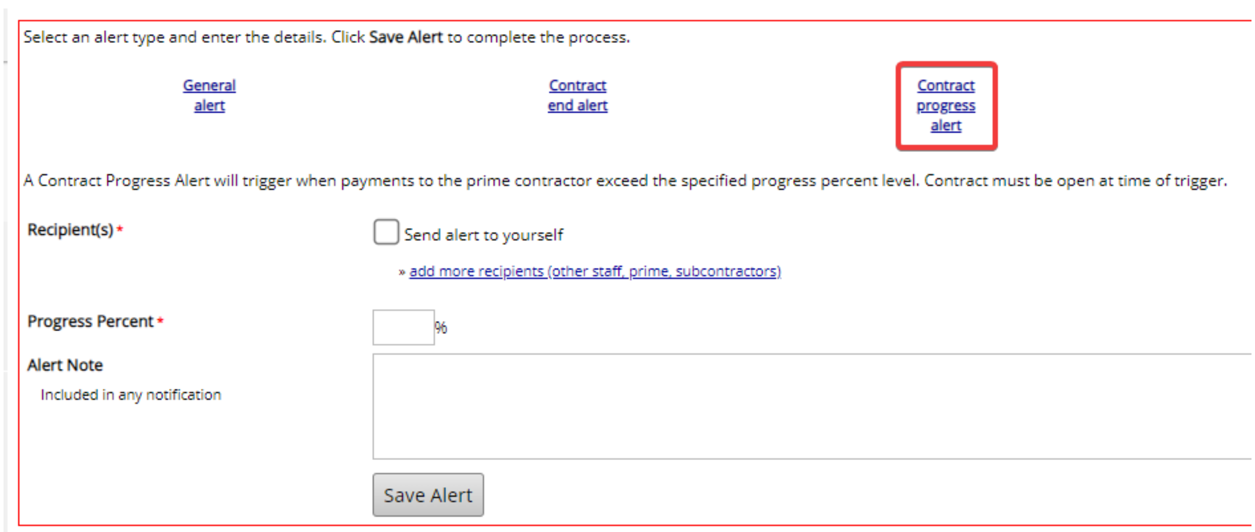
- Go to **Alerts** tab
    - Click **Add New Alert**



- **General Alert**
    - Set reminder for yourself and others, including Prime and Subcontractor(s).

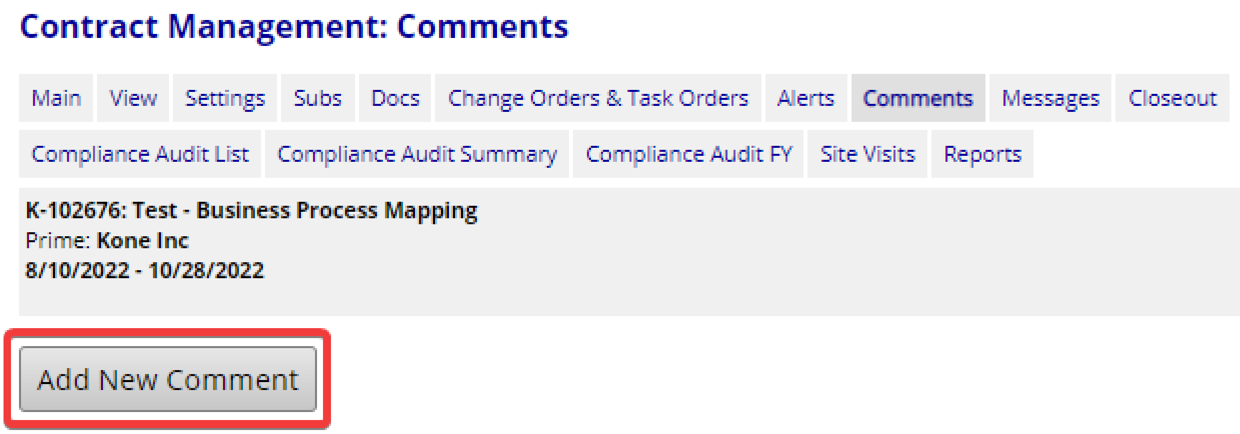


- **Contract End Alert**
  - Set reminder to yourself and others, including Prime and Subcontractor(s), about contract end date.

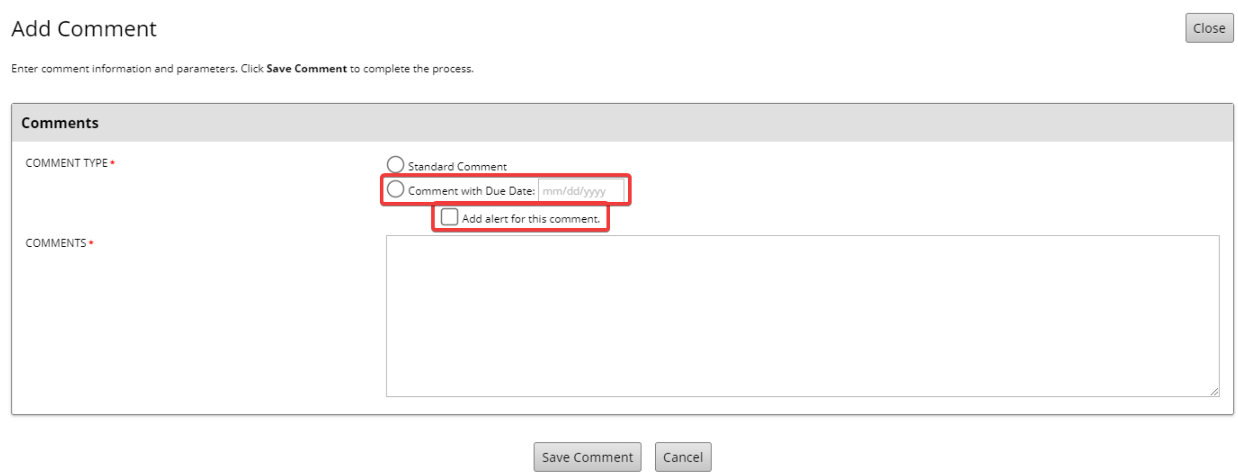


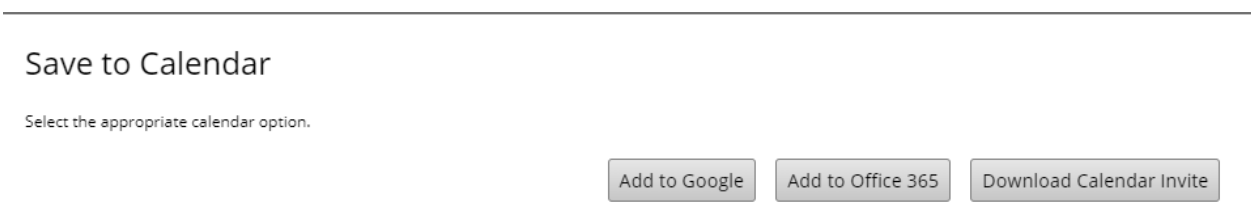
- **Contract Progress Alert**
  - Set reminder to yourself and others, including Prime and Subcontractor(s), when payments exceed specified percent level.

Comments



- Select **Comments** tab
- Click **Add New Comment**

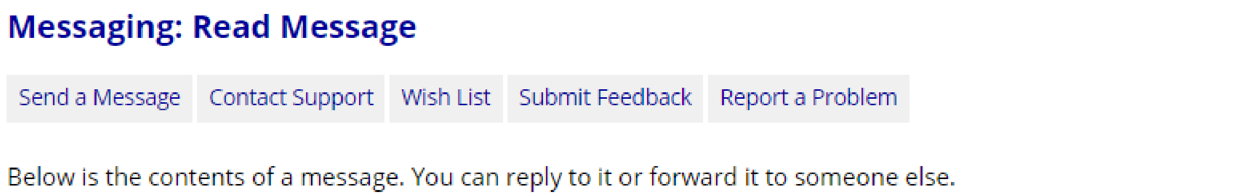


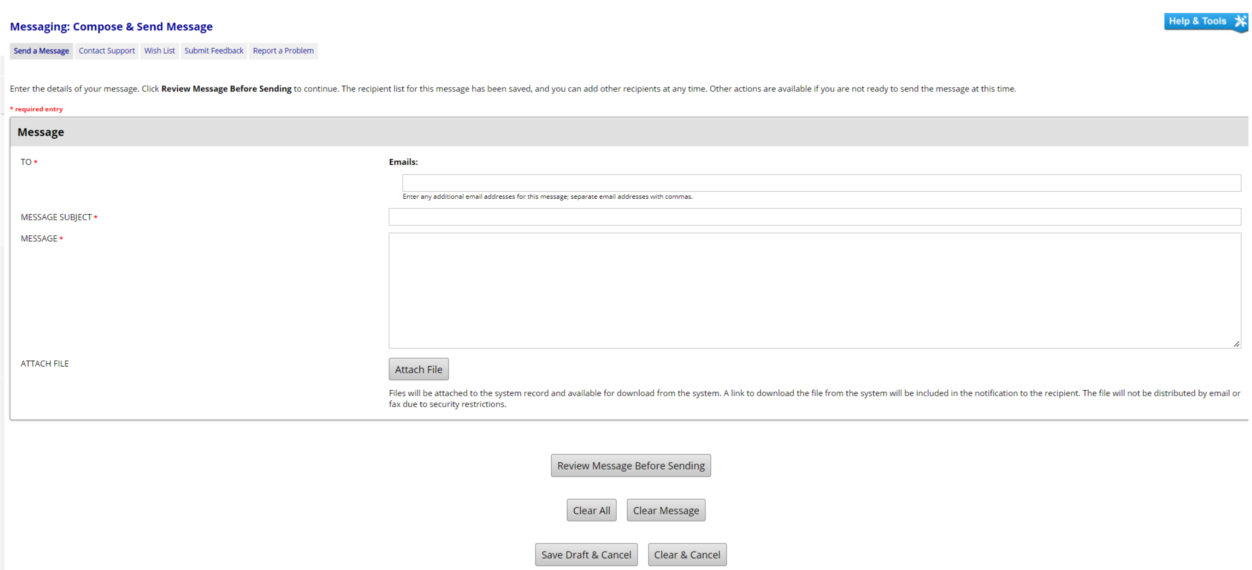


- Create comments with due dates and alerts and add to calendar.

Messages

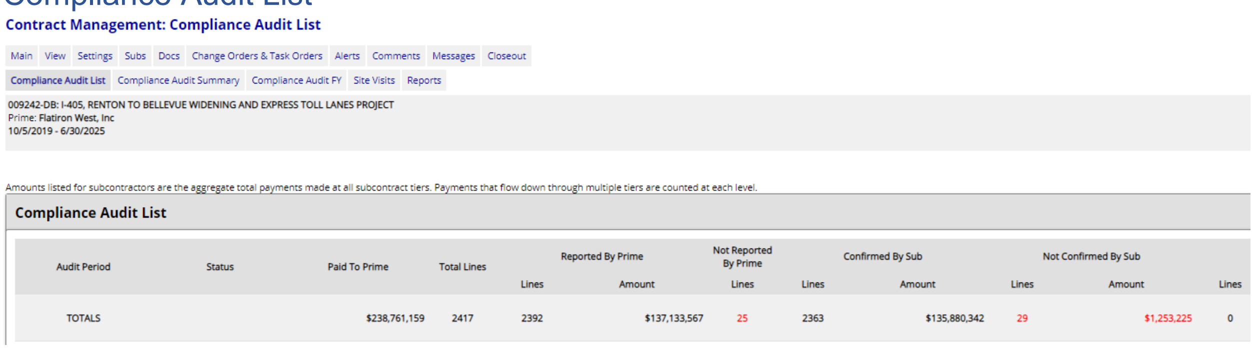
- Go to **Messages** tab
    - View list of messages for contract.





- Select **Send a Message** tab to

Compliance Audit List



Audit Period	Status	Paid To Prime	Total Lines	Reported By Prime		Not Reported By Prime	Confirmed By Sub		Not Confirmed By Sub		
				Lines	Amount	Lines	Lines	Amount	Lines	Amount	Lines
TOTALS		$238,761,159	2417	2392	$137,133,567	25	2363	$135,880,342	29	$1,253,225	0

- Go to **Compliance Audit List** tab
    - View list of monthly audits for contract.

Jul 2022	$6,698,790	129	104	$4,993,249	25	80	$3,810,162	24	$1,183,088	0	$0	8/1/202	View Audit
Jun 2022	$3,586,304	120	120	$5,564,247	0	116	$5,541,609	4	$22,637	0	$0	7/1/202	View Audit
May 2022	$5,545,154	121	121	$4,277,748	0	121	$4,277,748	0	$0	0	$0	6/1/202	View Audit
Apr 2022	$4,782,260	119	119	$5,854,212	0	119	$5,854,212	0	$0	0	$0	5/1/202	View Audit

- Select the Month/Year or **View Audit** link to review individual month's audits.

Compliance Audit Summary

Compliance Audit Summary - Total Contract

	Current Award	#	Award Percent	Payments	#	Payments Percent	Difference (Payments - Award)
Prime Contract	$726,035,433.99			$238,761,158.78			
For Credit	$188,769,212.84	93 subs	26.000%	$38,560,180.53	80 subs	16.150%	9.850% below goal
Goal Types							
For Credit to **DBE** Goal	$0.00	1 sub	0.000%	$0.00		0.000%	Goal matched
For Credit to **MBE** Goal	$72,603,543.40	23 subs	10.000%	$13,828,426.61	22 subs	5.792%	4.208% below goal
For Credit to **SSBE** Goal	$36,301,771.70	39 subs	5.000%	$15,638,273.95	33 subs	6.550%	1.550% above goal
For Credit to **VBE** Goal	$36,301,771.70	10 subs	5.000%	$2,830,194.20	8 subs	1.185%	3.815% below goal
For Credit to **WBE** Goal	$43,562,126.04	20 subs	6.000%	$6,263,285.77	17 subs	2.623%	3.377% below goal
Diverse Classifications - allows for firms to be counted toward multiple classifications; totals may exceed for credit goal amounts above							
For Credit to **DBE** Classification	$0.00	34 subs	0.000%	$19,195,888.65	30 subs	8.040%	8.040% above goal
For Credit to **FSBE** Classification	$0.00	31 subs	0.000%	$19,195,888.65	30 subs	8.040%	8.040% above goal
For Credit to **MBE** Classification	$72,603,543.40	33 subs	10.000%	$15,282,434.50	29 subs	6.401%	3.599% below goal
For Credit to **SSBE** Classification	$36,301,771.70	78 subs	5.000%	$37,015,931.44	66 subs	15.503%	10.503% above goal
For Credit to **VBE** Classification	$36,301,771.70	10 subs	5.000%	$2,830,194.20	8 subs	1.185%	3.815% below goal
For Credit to **WBE** Classification	$43,562,126.04	21 subs	6.000%	$6,457,633.16	18 subs	2.705%	3.295% below goal
Contract Progress	33%						
For Credit Progress	20%						

Amounts listed in the summary table above are payments retained by each subcontractor after payment of successive lower tier subcontractors. Award values may not match due to differences between overall contract goal and subcontractor assignments.

- Go to **Compliance Audit Summary** tab
    - View summary of audits by **Goal Type**, **Diverse Classification**, and how the payments affect the goals.

Compliance Audit FY

Compliance Audit: Fiscal Year Audit Summary - 10/1/2021 to 9/30/2022

Help & Tools

Main | View | Settings | Subs | Docs | Change Orders & Task Orders | Alerts | Comments | Messages | Closeout

Compliance Audit List | Compliance Audit Summary | **Compliance Audit FY** | Site Visits | Reports

009242-DB: I-405, RENTON TO BELLEVUE WIDENING AND EXPRESS TOLL LANES PROJECT
Prime: Flatiron West, Inc
10/5/2019 - 6/30/2025

Status: Open/Locked In
Current Award: $726,035,434
Goal: 26.00% Total Paid: $238,761,159
% Credit: 16.15% For Credit: $38,560,181

<< View Previous Fiscal Year << | >> View Next Fiscal Year Audit >>

Compliance Audit Summary - ~~10/1/2021 to 9/30/2022~~ 7/1/2021 to 6/30/2022

	Current Award	Award Percent	FY Payments	FY Payments Percent	Difference (Payments - Award)
Prime Contract	$726,035,433.99		$59,884,273.54		
For Credit	$188,769,212.84	26.000%	$15,011,912.65	25.068%	0.932% below goal
Goal Types					
For Credit to **MBE** Goal	$72,603,543.40	10.000%	$3,867,741.34	6.459%	3.541% below goal
For Credit to **SSBE** Goal	$36,301,771.70	5.000%	$7,262,270.22	12.127%	7.127% above goal
For Credit to **VBE** Goal	$36,301,771.70	5.000%	$1,270,773.64	2.122%	2.878% below goal
For Credit to **WBE** Goal	$43,562,126.04	6.000%	$2,611,127.45	4.360%	1.640% below goal
Diverse Classifications - allows for firms to be counted toward multiple classifications; totals may exceed for credit goal amounts above					
For Credit to **DBE** Classification	$0.00	0.000%	$5,613,917.04	9.375%	9.375% above goal
For Credit to **FSBE** Classification	$0.00	0.000%	$5,613,917.04	9.375%	9.375% above goal
For Credit to **MBE** Classification	$72,603,543.40	10.000%	$4,404,918.20	7.356%	2.644% below goal
For Credit to **SSBE** Classification	$36,301,771.70	5.000%	$13,911,786.16	23.231%	18.231% above goal
For Credit to **VBE** Classification	$36,301,771.70	5.000%	$1,270,773.64	2.122%	2.878% below goal
For Credit to **WBE** Classification	$43,562,126.04	6.000%	$2,645,721.17	4.418%	1.582% below goal

Amounts listed in the summary table above are payments retained by each subcontractor after payment of successive lower tier subcontractors. Award values may not match due to differences between overall contract goal and subcontractor assignments.

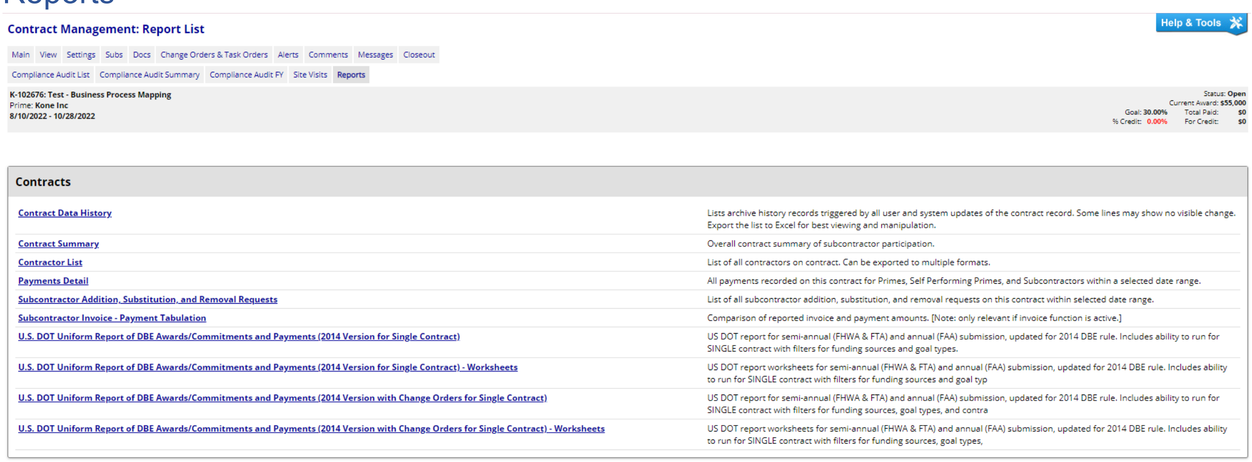
- Go to **Compliance Audit FY**
    - View summary of audits by Goal Type, Diverse Classifications, and how the payments affect the goals for the fiscal year to date.

- NOTE: This screenshot is not from Access Equity version of B2Gnow. Access Equity will have correct FY shown.

Site Visits

- Go to **Site Visits** tab
  - View or add site visits

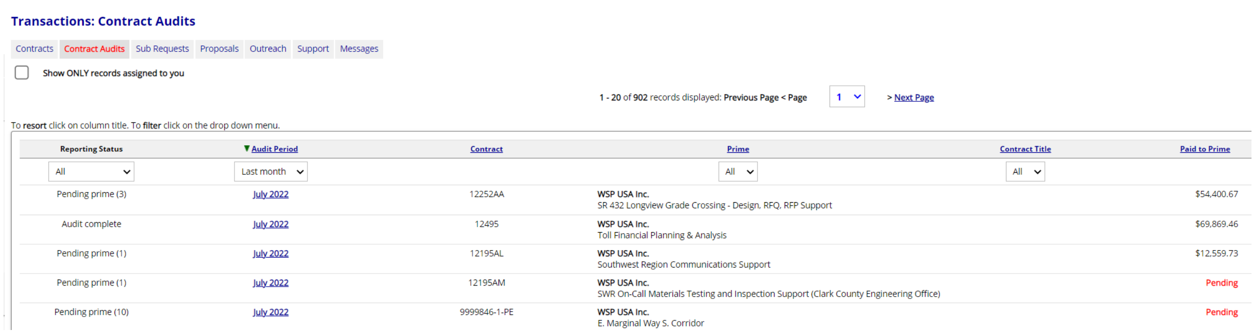
Reports



- Go to **Reports** tab
  - View available contract specific reports.

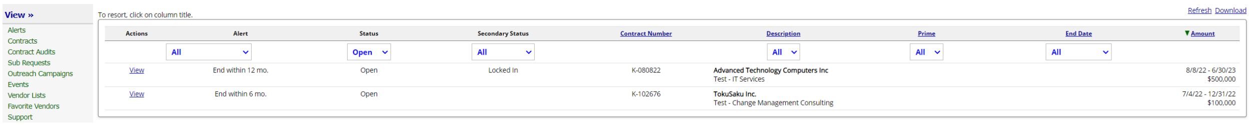
Contract Audits – Secondary Contract Agent

- Select **View >> Contract Audits** from left navigation bar

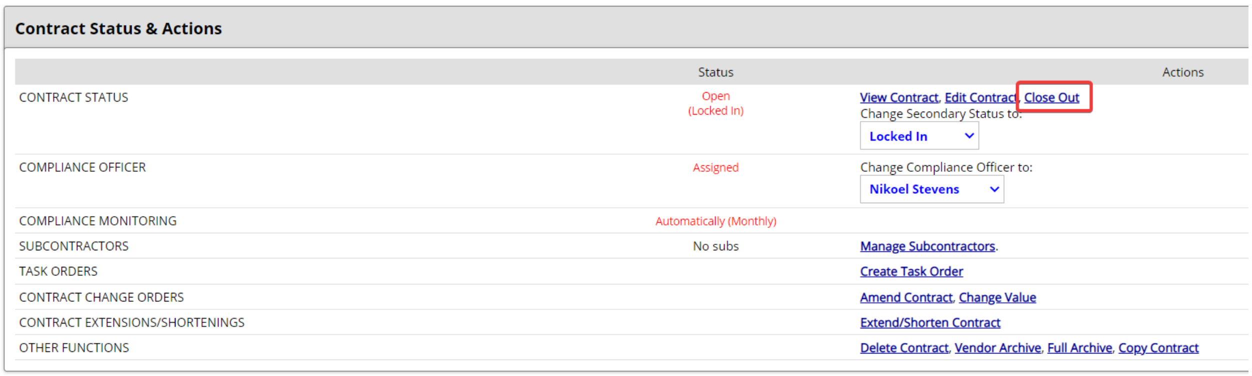


- **Show Only records assigned to you** will be automatically selected. De-select to audit all contracts.
- Select Contract Record using date link under **Audit Period**

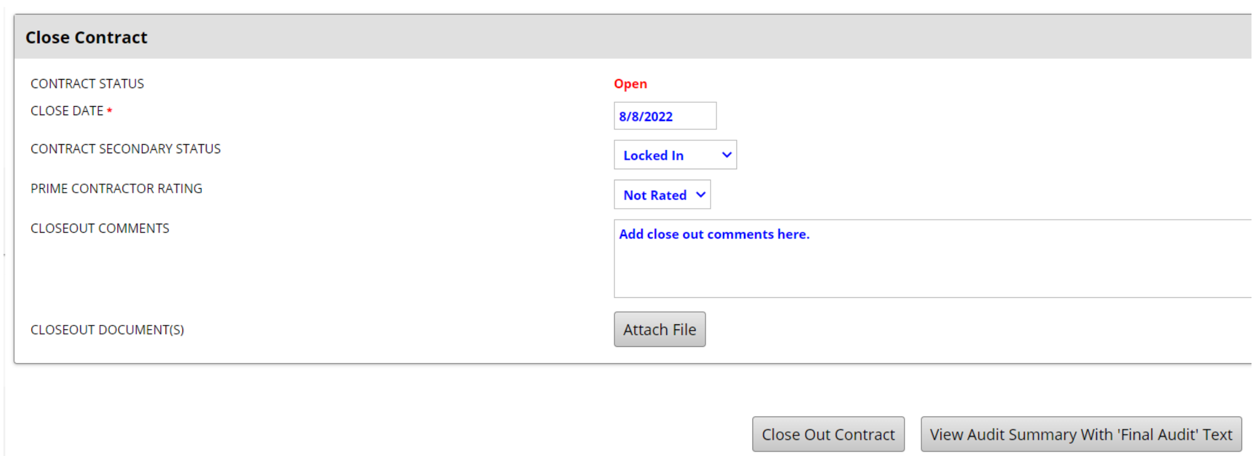
Contract Close Out



- **View >> Contracts** from left navigation bar
- Select **View** link for desired contract.

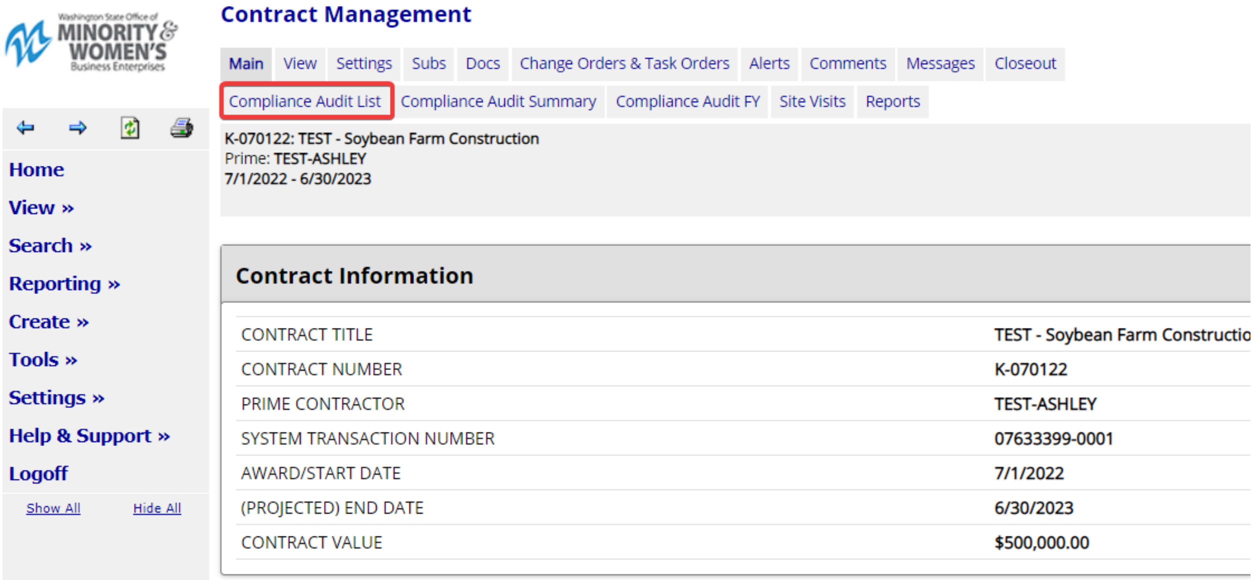


- Select **Close Out** link

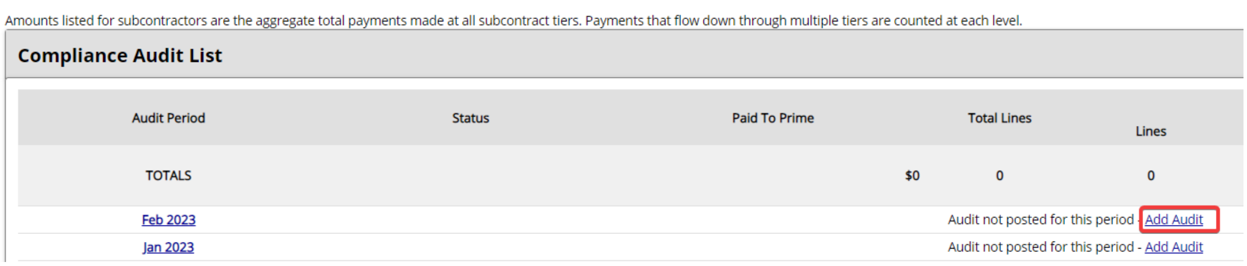


- Enter **CLOSE DATE**
- Add notes to **CLOSEOUT COMMENTS –** note any issues that occurred with the prime, sub, or the contract.
- Attach relevant close out files – **Attach File**
- **View Audit Summary With 'Final Audit' Text –** ensure all audits have been resolved.
- Select **Close Out Contract**

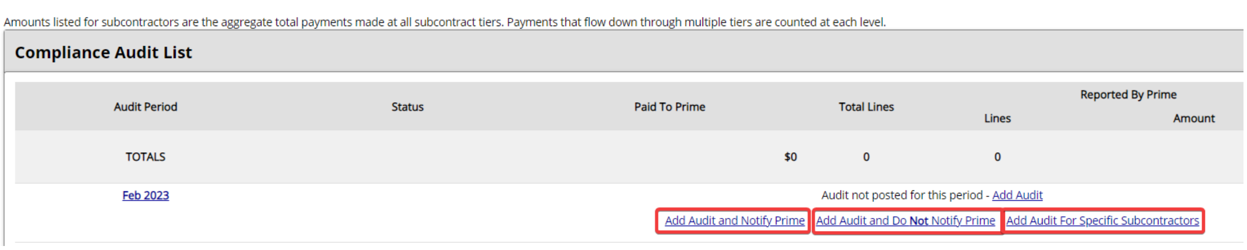
Compliance Audit



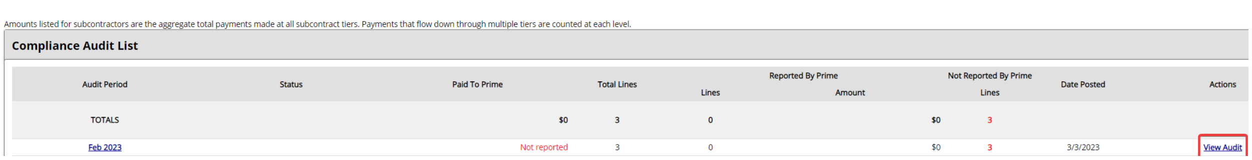
- Go to **Compliance Audit List** tab on contract



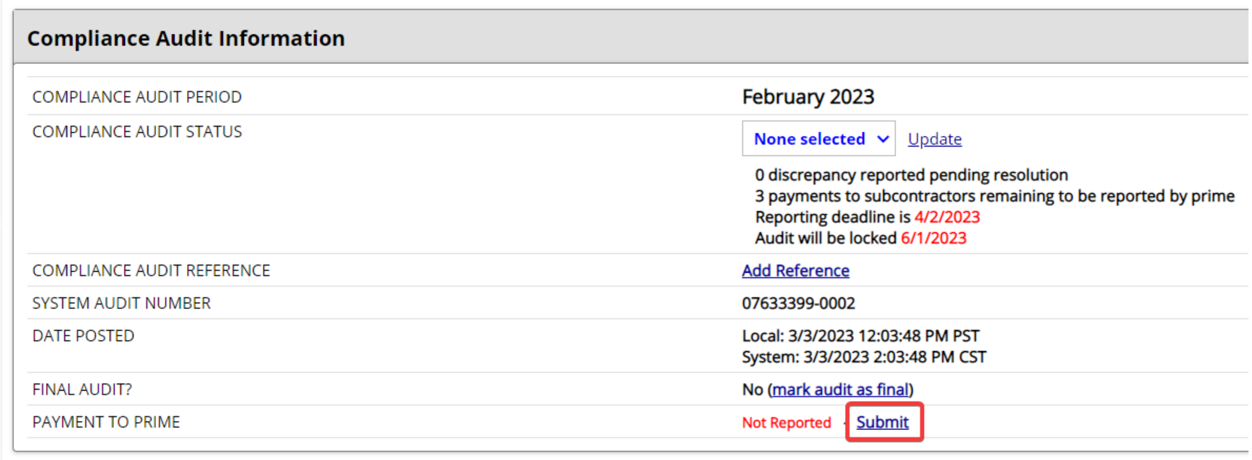
- Select **Add Audit** link



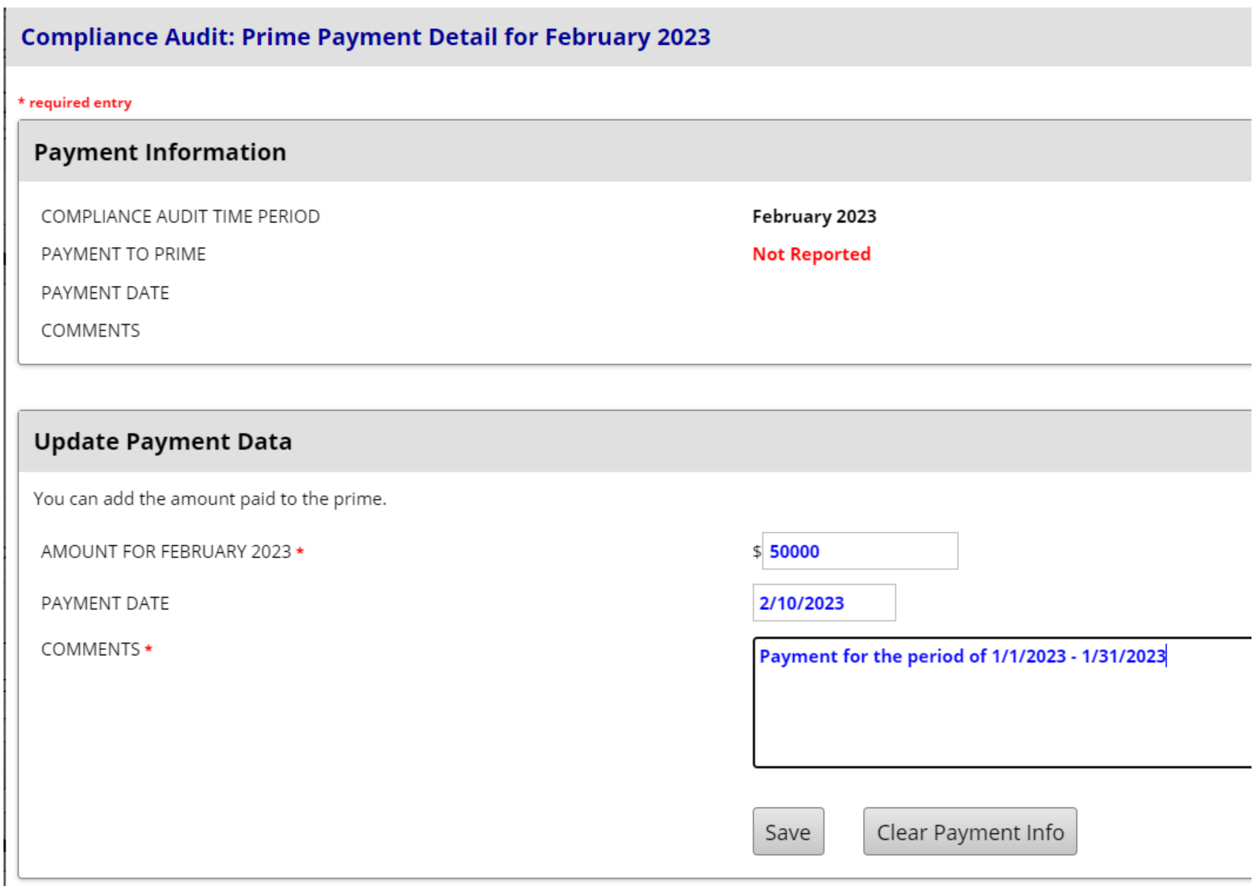
- Select one of three options
  - **Add Audit and Notify Prime**
  - **Add Audit and Do Not Notify Prime**
  - **Add Audit For Specific Subcontractors**



- Select **View Audit link**

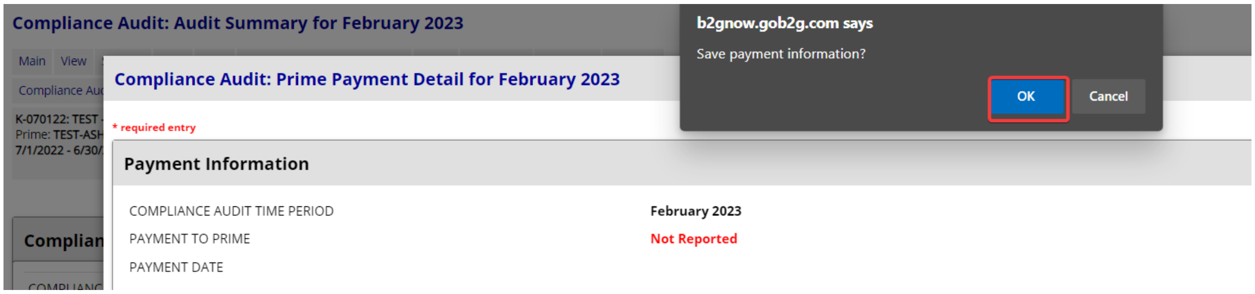


- Add payment made to Prime
  - **PAYMENT TO PRIME →** Select **Submit** link

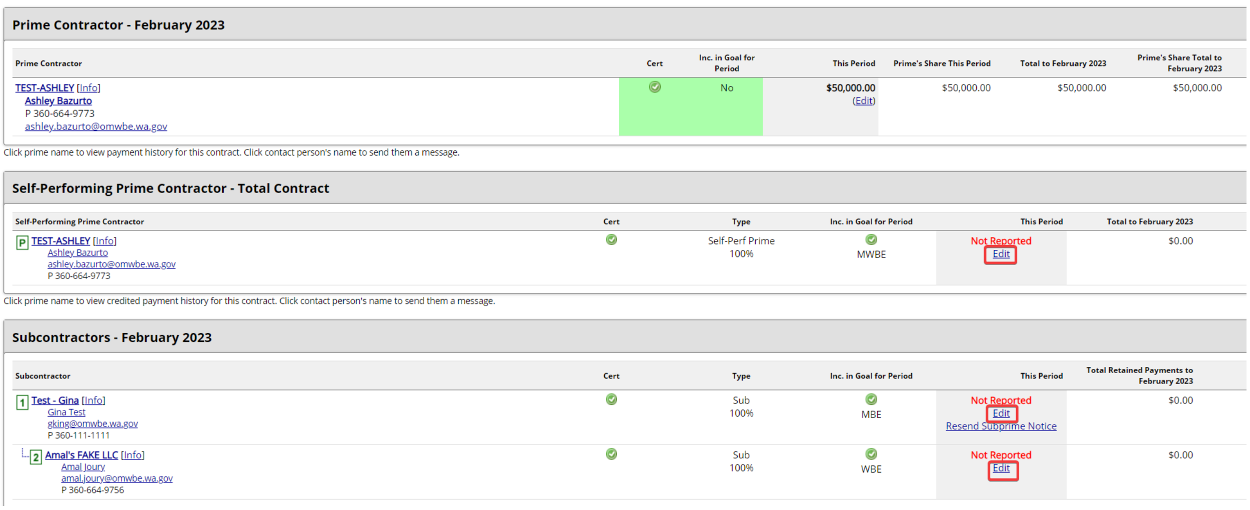


- Enter payment **AMOUNT**
- Enter **PAYMENT DATE**
- Enter **COMMENTS**

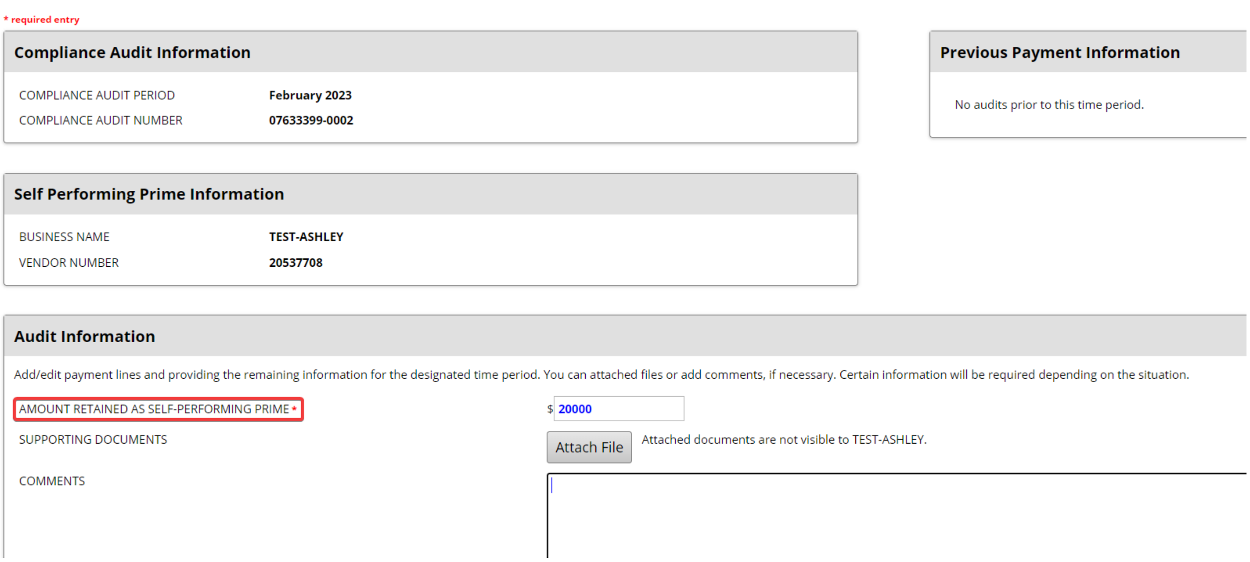
- Click **Save** button



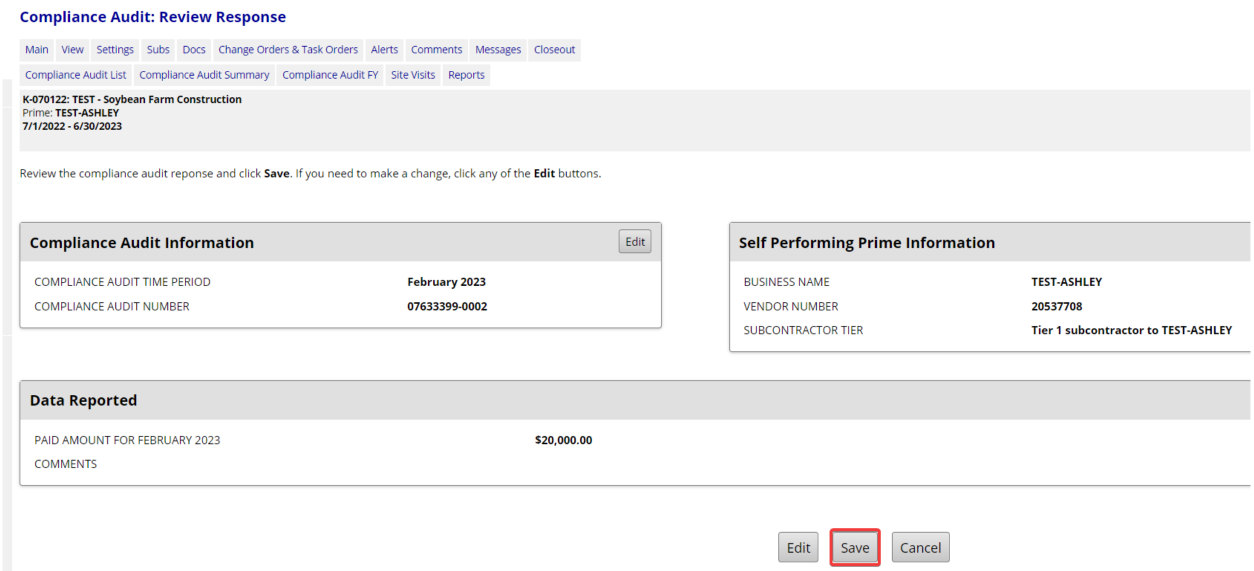
- Click **OK** button in pop-up



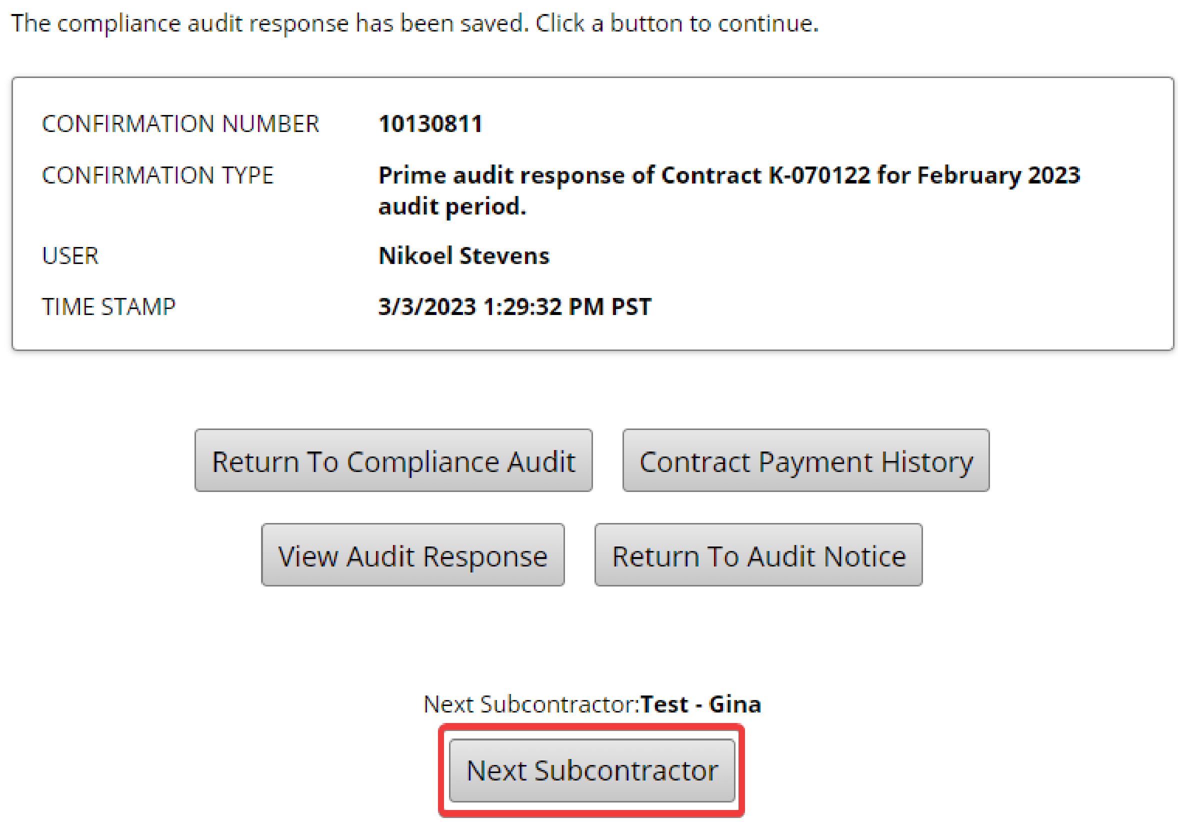
- Enter Sub payments (if applicable – or have Primes and higher tier Subs enter the payments)



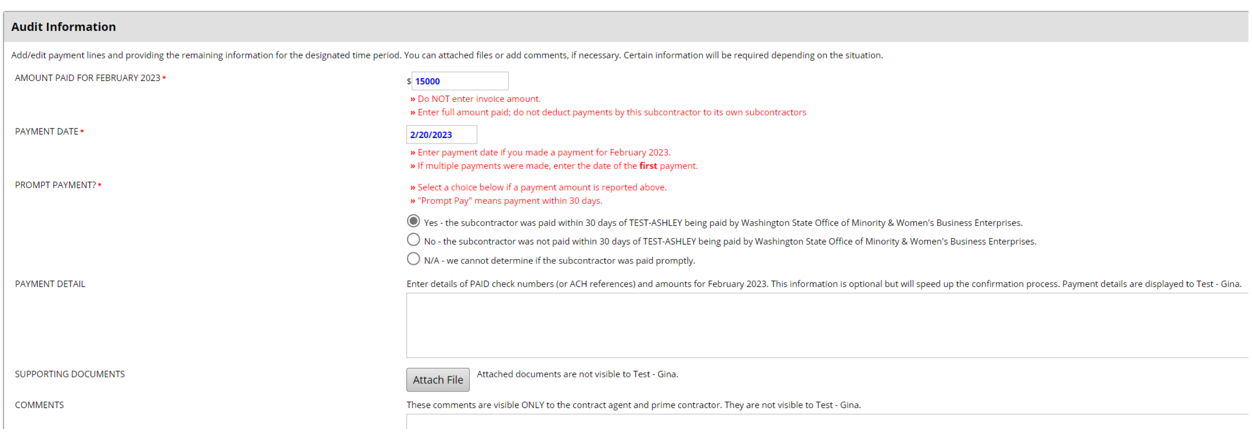
- Prime contractor should be added as a Subcontractor as **SELF-PERFORMING PRIME** if they perform a portion of the work
    - Record this payment as a portion of the payment to Prime
- Select **Review** button



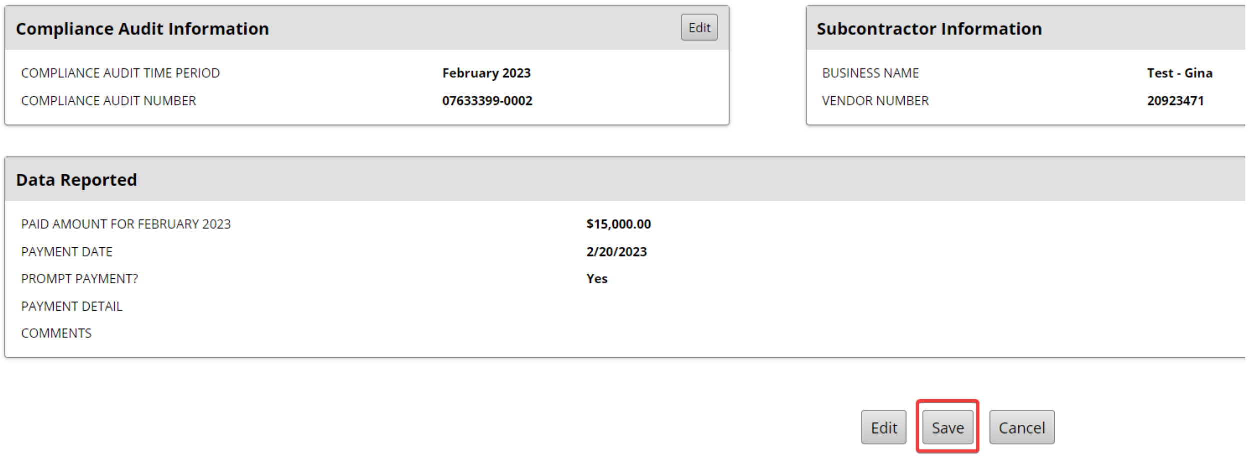
- Select **Save** button



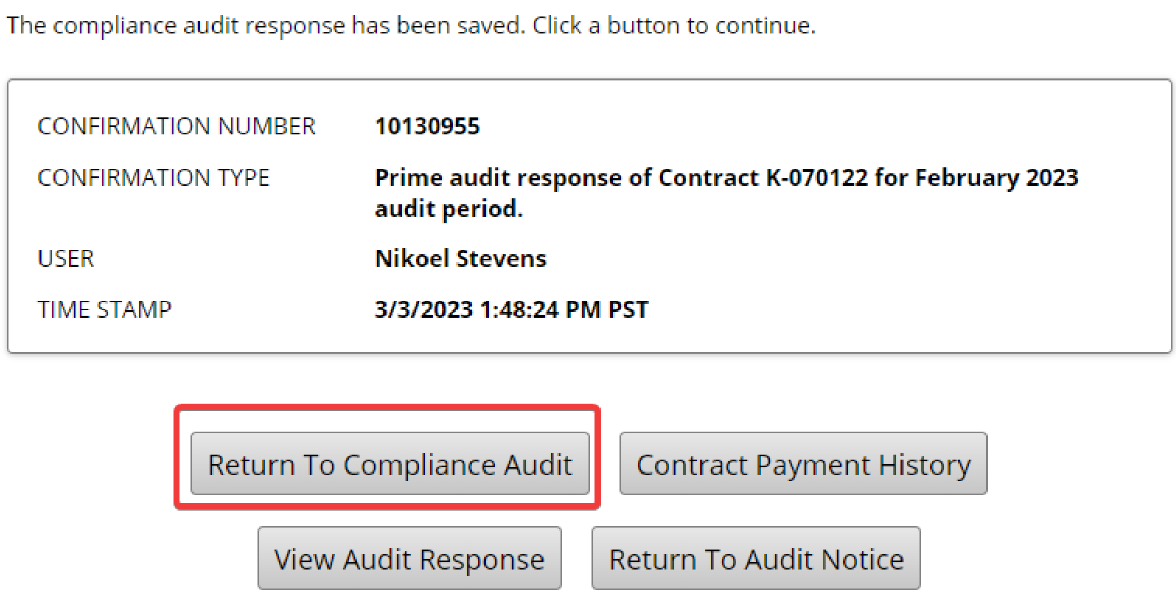
- Select **Next Subcontractor**



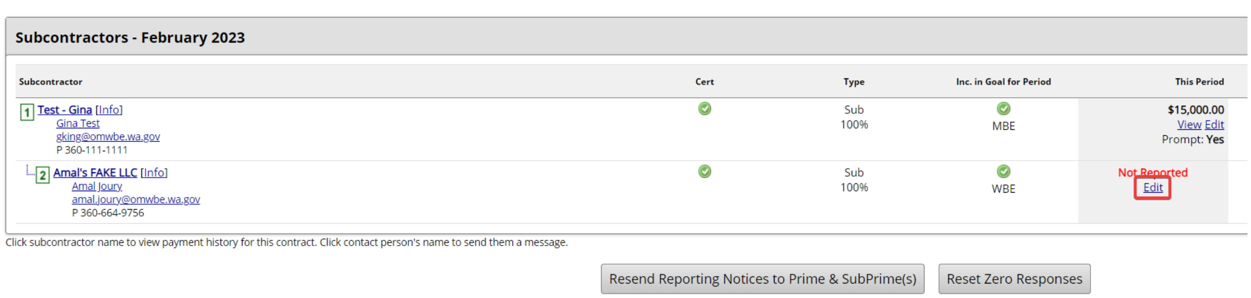
- Enter AMOUNT PAID
- Enter PAYMENT DATE
- Select applicable PROMPT PAYMENT option
    - **Yes – the subcontractor was paid within 30 days**
    - **No – the subcontractor was not paid within 30 days**
    - **N/A – we cannot determine if the subcontractor was paid promptly**
- Click **Review** button



- Click **Save** button



- Click **Return To Compliance Audit** button

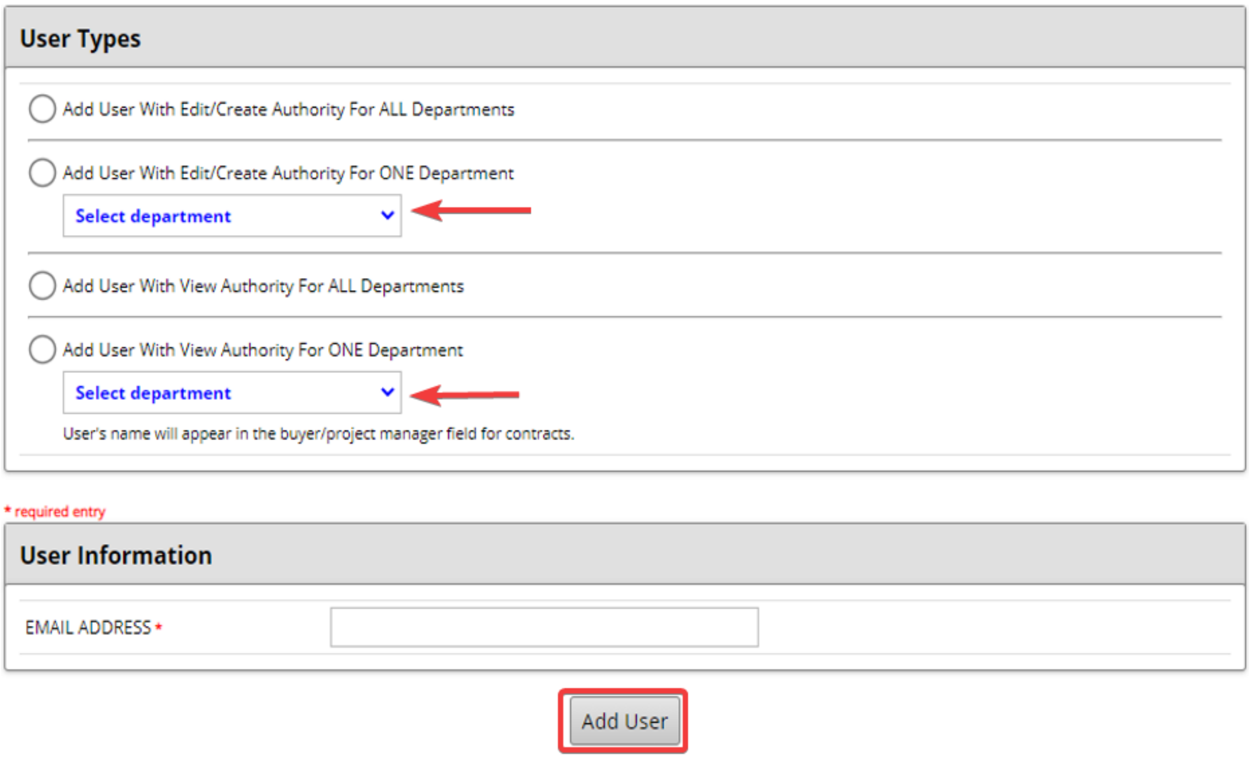


- Repeat above steps for next tier Sub

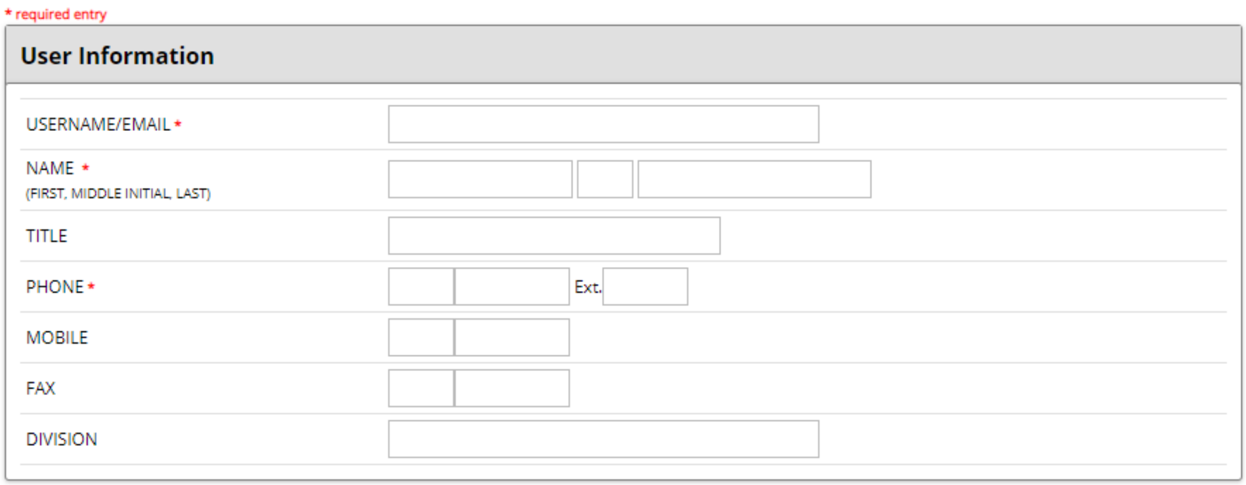
Account Administrator

Add New User

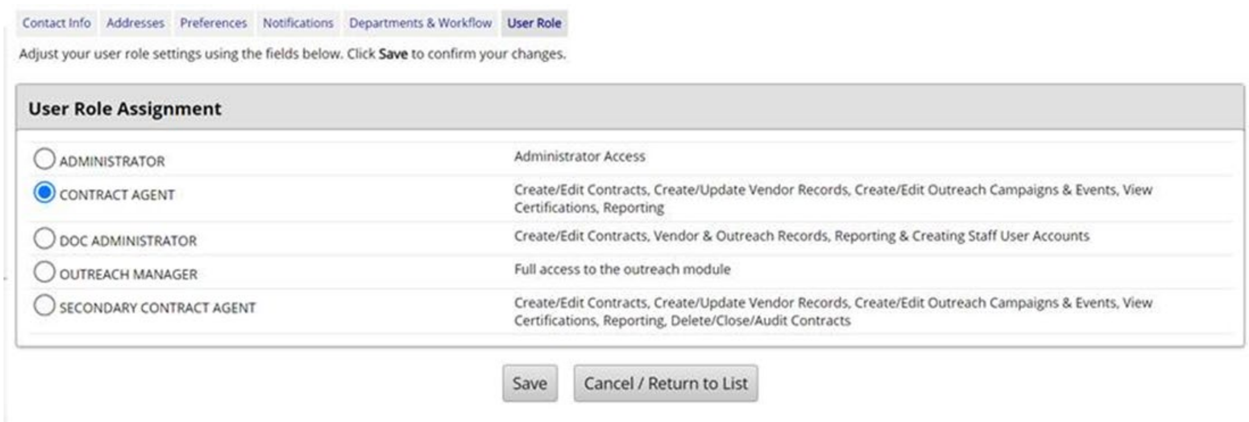
- Go to **Settings >> Add New User** from left navigation bar
    - NOTE: You need to choose whether you want the user to access all contracts for your organization or only contracts within a specified department.



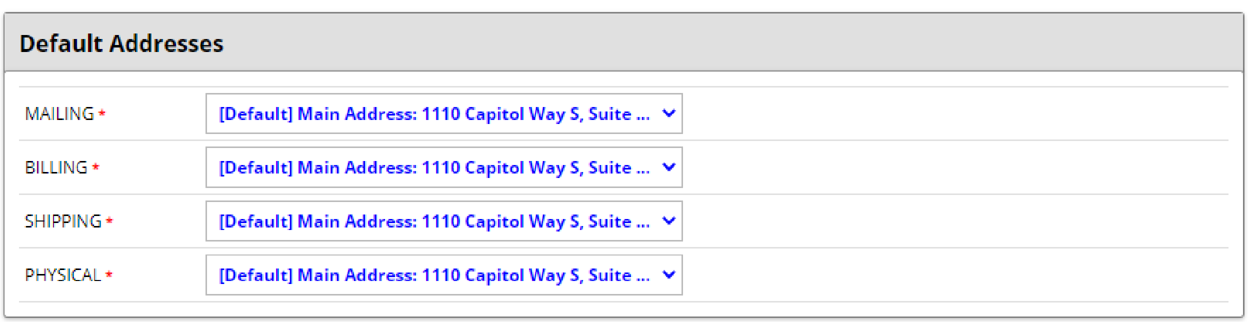
- Select user type options
    - Edit/Create - ALL Departments
    - Edit/Create - ONE Department
        - Select department from drop down menu
    - View only - ALL Departments
    - View only - ONE Departments
        - Select department from drop down menu
    - NOTE: Assigning user to a department will only allow them to access contracts within that department.
- Enter **EMAIL ADDRESS** for user
- Click **Add User**



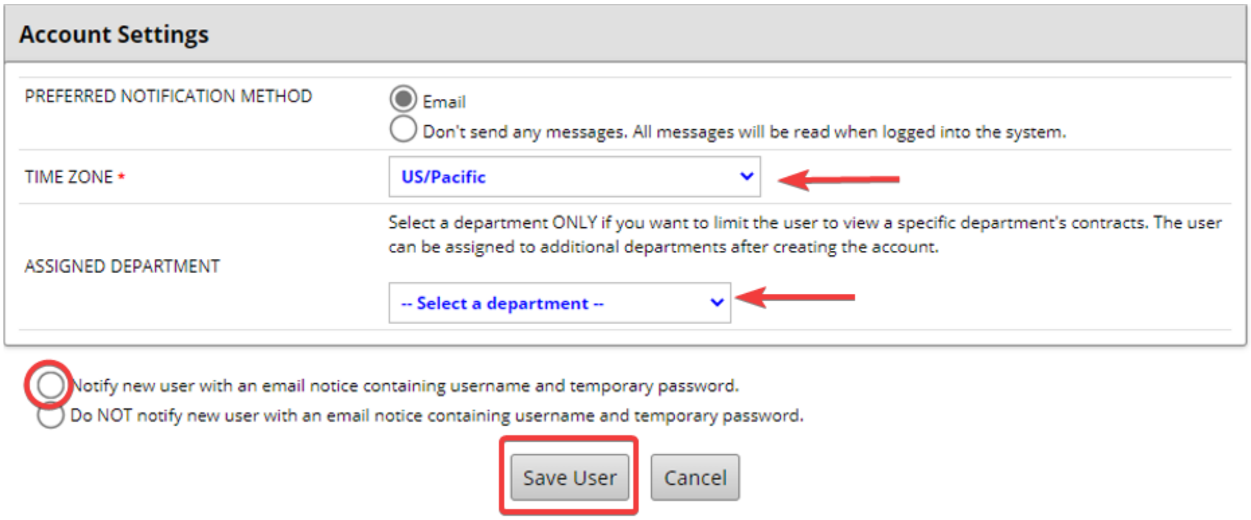
- Enter **User Information** into required fields



- Select appropriate role for user



- NOTE**: Default Addresses** are set to OMWBE's physical location.

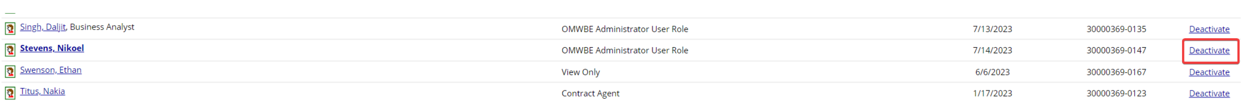


- Select **Email**
- Select option for ASSIGNED DEPARTMENT. Assigning a user to a department will only allow them to access contracts within that department.
- Select **Notify new user with an email notice containing username and temporary password.**
- Click **Save User**

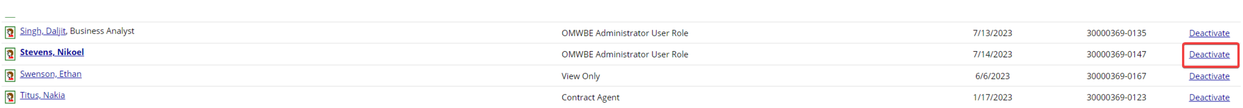
NOTE: User will receive instructions on how to access the portal with their credentials.

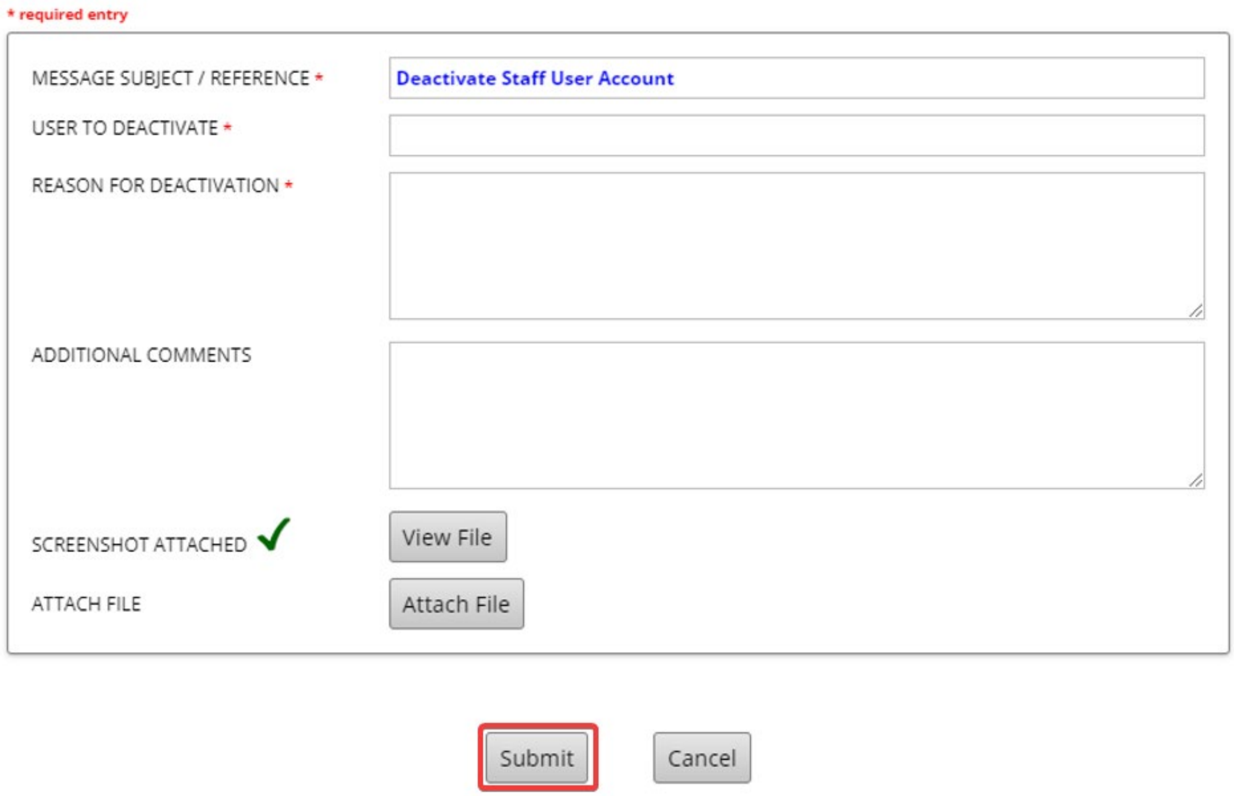
Deactivate User

- Go to **Settings >> User List** from left navigation bar
- Select **Deactivate** button for desired user

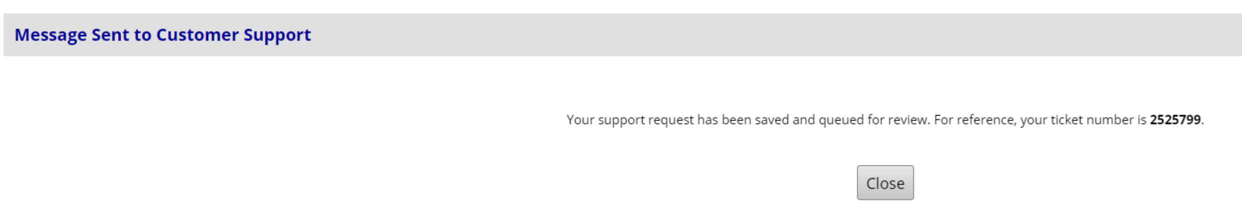


- Go to **Settings >> User List** from left navigation bar
- Select **Deactivate** button for desired user





- Select **Settings >> User List** from left navigation bar
- Locate username from **Staff User List**
- Select **Deactivate** link for the user (right-hand side)
- Enter name of **USER TO DEACTIVATE** (not email address)
- Enter **REASON FOR DEACTIVATION**
- Click **Submit**

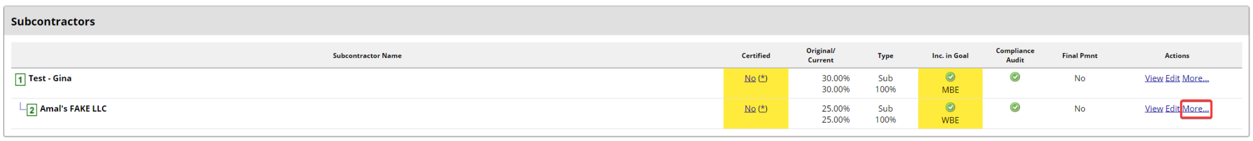


- B2Gnow will send an email from "OMWBE Diversity Management and Compliance System omwbe@diversitycompliance.com" acknowledging receipt of the request and again when the user has been deactivated

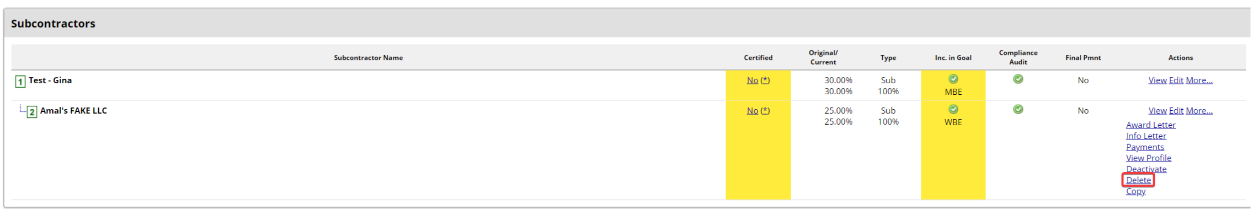
Delete or Deactivate Subcontractor

- Go to **View >> Contracts** from left navigation bar
- Select desired contract
- Go to **Subs** tab

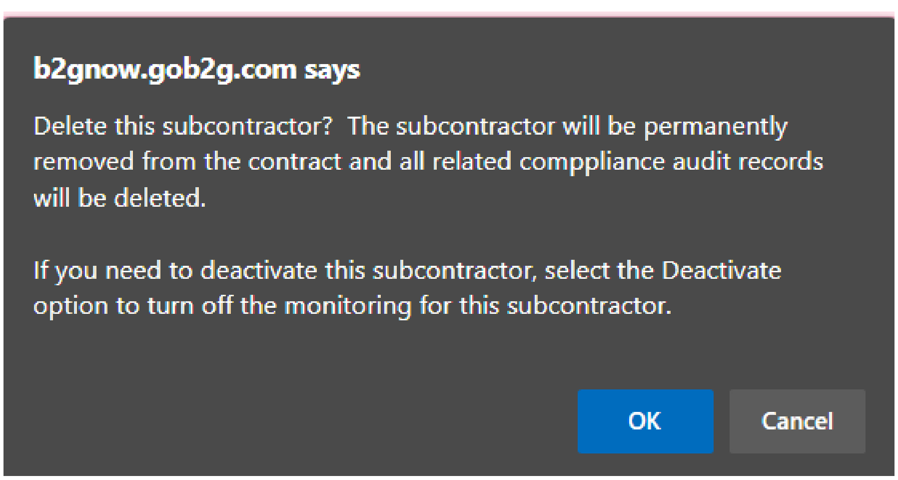
- Go to desired Subcontractor to delete



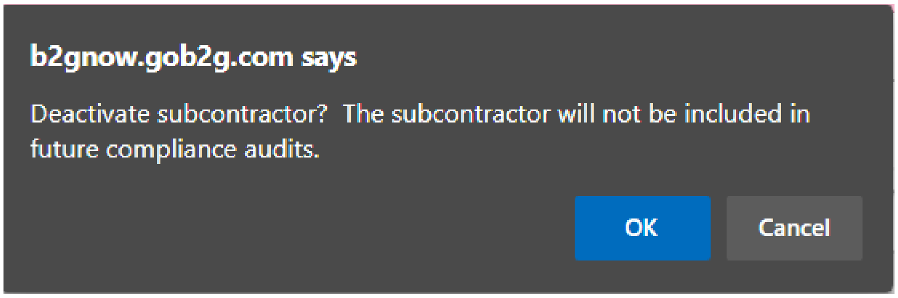
- Select **More** link



- Select **Delete** link to remove Subcontractor and all audit records

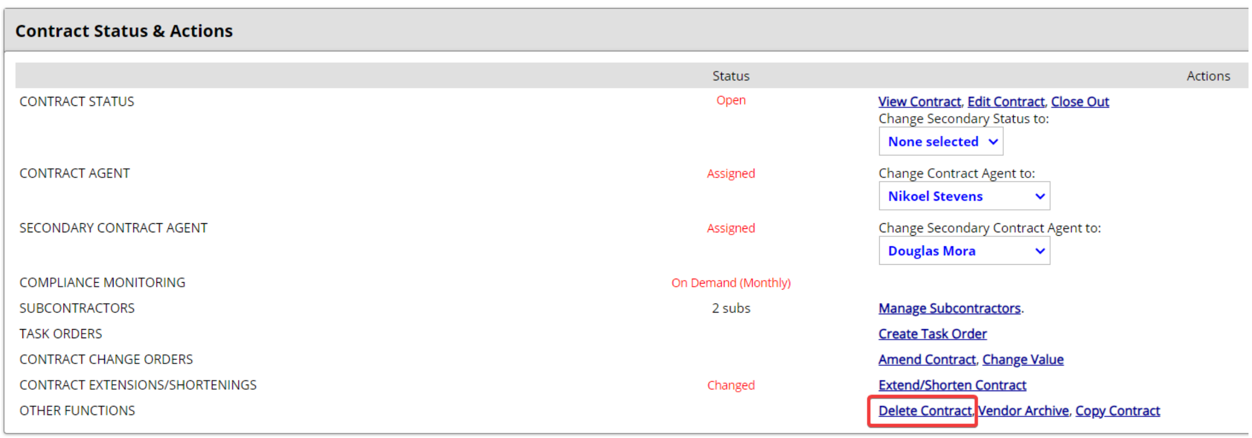


- Or **Deactivate** link to turn off monitoring for selected Subcontractor

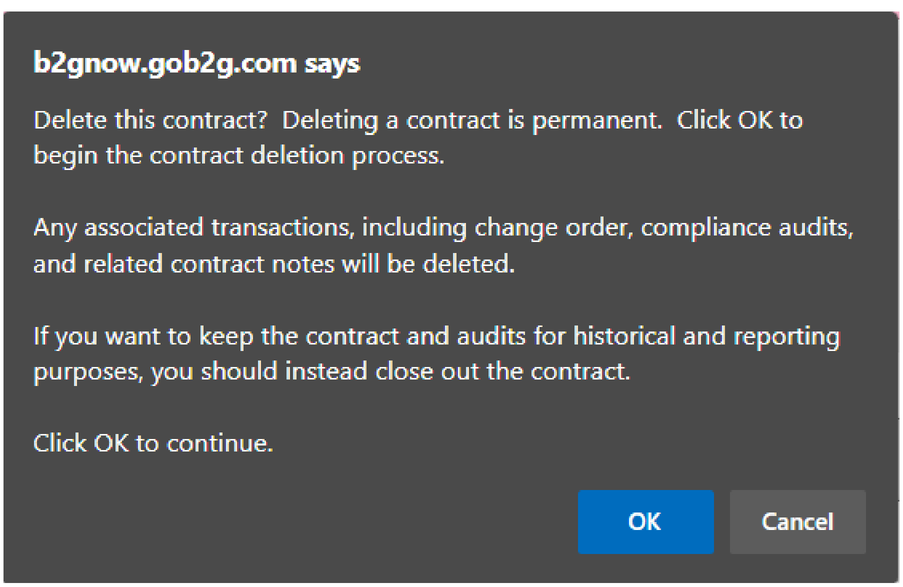


Delete Contract

- Go to **View >> Contracts** from left navigation bar
- Select desired contract
- From **Main** tab, navigate to **Contract Status & Actions** section



- Select **Delete Contract** link

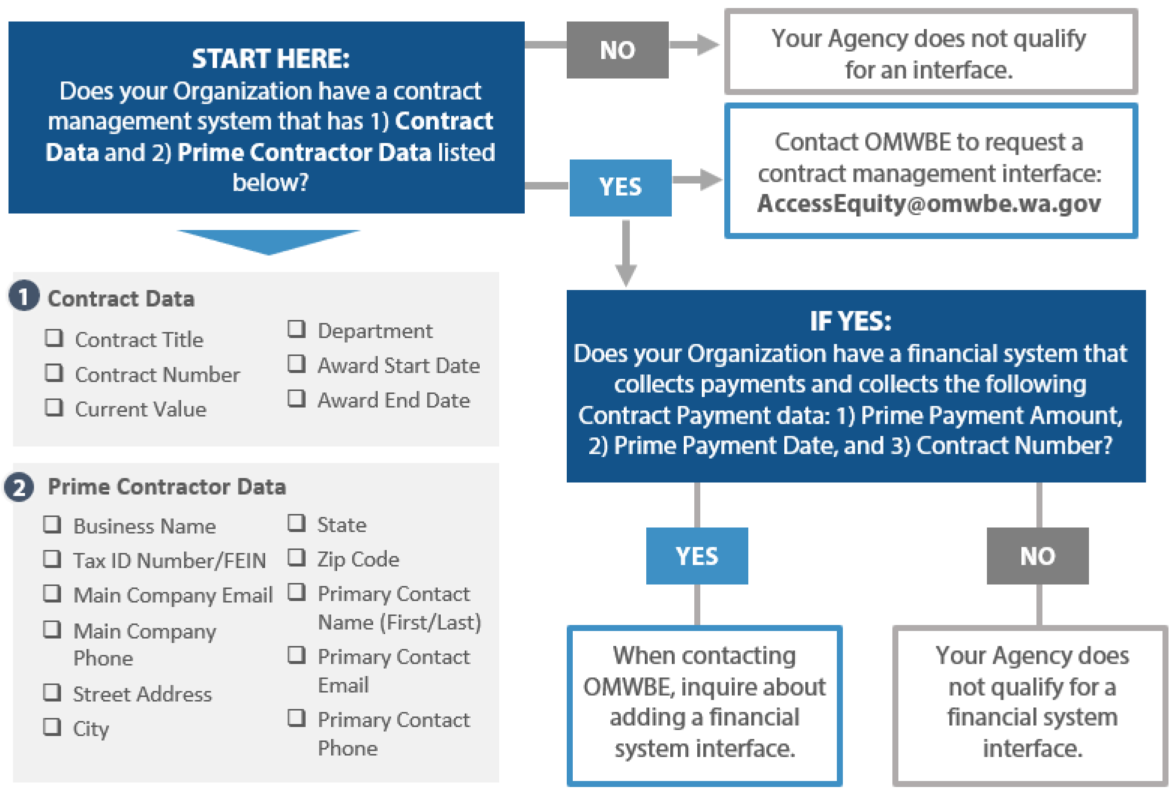


Requesting an Interface

An interface is a data integration process that takes data from one source such as a database of Excel spreadsheet and moves it into a data repository, in this case Access Equity.

All contracts that have subcontractor data require manual input into Access Equity. If you are currently capturing subcontractor data through a different system, you may be a candidate to create an interface and reduce the need for manual data entry.

Use the guide below to determine whether your agency qualifies for an Access Equity interface.



Required Training

It is required that the agency/institution will have persons responsible for pre-solicitation efforts as well as contracting efforts review the OMWBE Contract Compliance Module procedural document. For the latest version visit omwbe.diversitycompliance.com

Support

All support requests must follow an escalation process:
Staff Users → Account Administrators → OMWBE

Please contact the Account Administrator at your organization if you have any questions about using Access Equity. Account Administrators will provide internal support to users within their organizations, and may contact OMWBE if the answer to a question or issue is unknown. Account Administrators are also responsible for addressing vendor support requests from Prime Contractors/Consultants and Subcontractors.

Commons support requests include: Adding or Editing User Accounts, General System Support, Program Questions, and Feature Requests for System Enhancements.

Account Administrators – Please contact AccessEquity@omwbe.wa.gov for OMWBE support. We will respond to your request within 1-business day. If a question requires additional technical assistance, OMWBE will escalate the issue to B2Gnow support.

Please note that any questions concerning Veteran Owned Businesses (VOBs) must be directed to the Washington State Department of Veterans' Affairs (WA DVA).

Glossary

Award End Date - The expected date when all the contracted activities under an awarded contract will have been completed.

Award Start Date - The date the bid process is complete, and the contract is awarded.

B2Gnow - A diversity management and compliance software system used to process applications for certification, track certified businesses, perform outreach, goal plan, and monitor contract compliance. The software also allows prime contractors, subcontractors, Contract Agents, and Secondary Contract Agents to view the same contract, outreach, and goal plan information.

Contract Category - This field is a more granular description about the work to be done on a given contract.

Contract Holder/Owner - An Agency (entity) that grants a deal for an assignment and takes the responsibility of paying the contractor.

Contract Number - A unique alphanumeric character number to identify a contract.

Contract Record - The file created in Access Equity for tracking participation on an executed contract.

Contract Secondary Status - This field is used to identify the status of a given contract. The primary status is open/closed, and secondary status is pending or on hold.

Contract Title - The general description of the contract scope based on contract activities.

Contract Type - This field describes the work to be done on a given contract.

Current Value - The value of the contract for a given or current time, after any change order amendments.

DBA Name - DBA means "doing business as." A DBA is any registered name that a business operates under that is not its legal business name.

Department - Distinct part of an agency organizational structure.

Educational Institutions - These are state universities, regional universities, community colleges, and technical colleges.

Final Acceptance - The date of contract completion accepted and/or deliverables received by owner.

Genuine Efforts - Efforts to achieve a goal or other requirement, which by their scope, intensity, and appropriateness to the objective, can reasonably be expected to fulfill the program requirement.

Minority Business Enterprise [MBE] - A for-profit small business that is at least fifty-one [51] percent owned by one [1] or more individuals who both belong to an ethnic minority group such as but not limited to: Native American/Indigenous, Black, Hispanic, Asian/ Pacific Islander, or Sub-continent Asian or, in the case of a corporation in which fifty-one [51] percent of the stock is owned by one [1] or more such individuals; and whose management and daily operations are controlled by one [1] or more of the ethnic minority individuals who own it.

North American Industry Classification System [NAICS] - NAICS is used to classify businesses with a six-digit number based on the primary type of work the business performs.

National Institute of Governmental Purchasing [NIGP] Commodity Codes - The NIGP Code is a coding taxonomy used primarily to classify products and services procured by state and local governments in North America.

Notice To Proceed Date - This is the notice date that will inform the contractor of the date that the firm can start work, as outlined in a contract. The date mentioned in the notice to proceed will be the official start of the contract.

Original Value - The total value originally planned to be spent by the contract.

Pre-Bid Date - This field captures the date the agency owner provides instructions to the interested vendor on a contract.

Prime Contractor or Consultant [Prime] - An individual, firm, or organization owed a return on a contractual obligation. This is the entity owed a payment in return for the fulfillment of the terms of the contract. The Prime Contractor or Consultant will perform, cause to perform, and/or deliver all the services and goods included in the contract.

Public Owner - State agency or educational institution that holds a contract.

Prime Payment Amount - The is the amount that was paid to the prime contractor based on the contract payment terms within a specific time.

Prime Payment Date - The is the date when the amount was paid to the prime contractor based on the contract payment terms.

Quality Assurance - The maintenance of a desired level of quality in a service, especially by means of attention to every stage of the process of delivery or production.

Quality Control - A system of maintaining standards by testing a sample of the output against the specification.

Retainage – A percentage of a contract price retained from a contractor as assurance that subcontractors will be paid and that the job will be completed.

Sub Award Amount - The amount expected to be paid to the subcontractor by the prime contractor or up-tier Sub for a specific activity of scope.

Subcontract Award Date - The date when the Prime Contractor selected the Subcontractor to participate on a given Contract.

Subcontractor [Sub] - One not in the employment of the contractor (or prime) who is performing all or part of those services under a contract through a separate contract with the contractor.

Substantial Completion - The date the engineer determines the contracting agency has full and unrestricted use and benefits of the facilities, both from the operational and safety standpoint, and only minor and minor incident work, replacement of temporary substitute facilities, or correction remains for the physical completion of the total contract.

Type of Participation - The form of work to be performed by the subcontractor on a given contract, related to what percentage of the payments to the subcontractor will be counted towards the contract goal.

Women Business Enterprise [WBE] - A for-profit small business that is at least fifty-one [51] percent owned by one [1] or more women or, in the case of a corporation in which fifty-one [51] percent of the stock is owned by one [1] or more women; and whose management and daily operations are controlled by one [1] or more of the women who own it.

Work Description - A brief description of the Work to be done on the contract, usually related to work codes.

References

OMWBE Executive Order 22-01 Implementation Plan

OMWBE Supplier Diversity Tools for Equity in Public Spending

Department of Employee Services [DES] Business Diversity and Initiatives

North American Industry Classification System [NAICS] Codes

North American Industry Classification System (NAICS) U.S. Census Bureau

State of Washington Disparity Study 2019