

Access Equity User Guide

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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**

Vendor List Parameters

VENDOR LIST TITLE *

DESCRIPTION

VENDOR LIST EDITING *

☐ Vendor list can be edited by anyone in your organization.
 ☐ Vendor list can be edited only by a designated user (currently you).

VENDOR LIST ACCESS *

☐ Vendor list can be viewed and used by anyone in your organization.
 ☐ Vendor list can be viewed and used only by a designated user (currently you).

Create Vendor List

Cancel

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**

Outreach: Vendor List

Add Vendors

Vendor List

TITLE	test list
DESCRIPTION	test list for solicitation
LIST OWNER	Nikoe! Stevens
EDITING	Vendor list can be edited only by the list owner.
ACCESS	Vendor list can be viewed and used only by the list owner.

To resort click column title. To filter click drop down menu.

System Vendor #

Vendor

All

Con

No vendors found; adjust filters or [Add Vendors](#).

Copy Vendor List

Delete Vendor List

Add Vendors to the List

- Click **Add Vendors**

Search for vendors using names, location, classification, and/or other criteria. Enter information into any of the boxes below and click one of the search buttons. Some parameters may be required.

Search

Clear Form

Cancel/Return

Quick Search Options

Click a button to initiate an immediate search:

Current Certified Directory

Certified Directory as of: mm/dd/yyyy

- Search by **Certified Directory**

Search Parameters

BUSINESS NAME/DBA

Enter business name, DBA name, Tax ID number, or System Vendor Number; all searches are wildcard (e.g. *text*).

CONTACT PERSON

First name

Last name

Contact Type

Users

CITY

STATE/PROVINCE

Select one or more

ZIP CODE/POSTAL CODE

Search for multiple zip codes and post codes by separating with commas

DISTANCE SEARCH

Within 5 miles of zipcode (this new parameter is currently in beta test)

PHONE AREA CODE

COMMODITY CODES

Click to Lookup Commodity Codes

BUSINESS DESCRIPTION

If one of more certification options are selected below, search of above location parameters will be based on certification data; otherwise vendor profile data will be used.

- By specific **Search Parameters**

Certification Parameters

CERTIFICATIONS

CERTIFICATION ACTION

CERTIFICATION STATUS

ASSIGNED CERTIFICATION OFFICER

INCLUDE EXPANSIONS

Use the field below to identify organizations and certification types for this search. Click an organization name to select/unselect all of its types.

[State of Washington DES: Veteran Owned Business (VOB)], [Washington State

☐ Small Business Enterprise (SBE)
☒ Veteran Owned Business (VOB)
 Washington State Office of Minority & Women's Business Enterprises
☐ Airport Concessionaire Disadvantaged Business Enterprise (ACDBE)
☒ Combination Business Enterprise (CBE)
☐ Disadvantage Business Enterprise - Alaska (Alaska DBE)
☐ Disadvantaged Business Enterprise (DBE)
☐ Disadvantaged Business Enterprise (FAA Only) (DBE (FAA Only))
☒ Minority Business Enterprise (MBE)
☒ Minority/Women Business Enterprise (MWBE)
☐ Use expiration date instead of renewal date in search

Select one or more

☐ Include expansion records in search results

☐ [Select all]

State of Washington DES

☐ Disabled Veteran Business Enterprise (DVBE)
☐ Small Business Enterprise (SBE)
☒ Veteran Owned Business (VOB)

Washington State Office of Minority & Women's Business Enterprises

☐ Airport Concessionaire Disadvantaged Business Enterprise (ACDBE)
☒ Combination Business Enterprise (CBE)
☐ Disadvantage Business Enterprise - Alaska (Alaska DBE)
☒ Minority Business Enterprise (MBE)
☒ Minority/Women Business Enterprise (MWBE)
☐ Small Business Enterprise (SBE)
☒ Socially and Economically Disadvantaged Business Enterprise (SEDBE)
☒ Women Business Enterprise (WBE)

- 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]

CERTIFICATION STATUS

ASSIGNED CERTIFICATION OFFICER

INCLUDE EXPANSIONS

Advanced Search Parameters

ETHNICITY

CERTIFICATION STATUS

Certified/Active

All (certified, pending, expired, other)

Certified/Active

Recently Certified - enter dates below

Pending/In Process - select optional process step below

Application Closed **

Renewing/Expiring (all) **

Renewing/Expiring (w/out pending or approved cert record) **

Expired (all) - enter dates below

Expired (w/out pending or approved cert record) **

Denied **

Decertified **

Suspended **

Pending Reinstatement/Un suspension **

Proposed Graduation **

Graduated **

Withdrawn **

Preliminary Denial **

Proposed Decertification **

Appeal Received/Pending **

Appeal Upheld **

ad certification processing record) search filter to same certification type.

ed/expired search filter.

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

Search: Vendors CLOSE WINDOW

To add all vendors click **Add ALL Vendors**, or select specific vendors and click **Add Selected Vendors**.

To resort click column title. To filter click drop down menu.

Business Name	Location	Phone Number	Select
B2G NOW TEST PRIME VENDORS	PHOENIX, AZ	602-325-9277	<input type="checkbox"/>

1 - 1 of 1 record displayed: Page 1

Search Again **Add Selected Vendors to Vendor List** Add ALL Vendors to Vendor List Cancel/Return

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

Outreach: Add Vendors to Vendor List

* required entry

Parameters

VENDOR COUNT 1

VENDOR LIST test list

COMMENT / LABEL test

Use this to tag contacts for later reference of where they were sourced from.

Add Vendors to Vendor List

Return to Search Results

Cancel Transfer

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

Outreach: Vendor List

Contacts added to list.

Add Vendors

Transfer to Outreach

Export List

Vendor List

TITLE	test list
DESCRIPTION	test list for solicitation
LIST OWNER	Nikoel Stevens
EDITING	Vendor list can be edited only by the list owner.
ACCESS	Vendor list can be viewed and used only by the list owner.

To resort click column title. To filter click drop down menu.

System Vendor #	Vendor	Comment
	All	
20440898	B2Gnow Test Prime Vendor5	test

1 - 1 of 1 records displayed: Previous Page < Page 1 > Next Page

Copy Vendor List

Delete ALL Assigned Vendors

Delete Vendor List

- Other options available as needed

Create Event

Add information about your event and adjust the default settings as needed. This event can be edited only by the listed Event Coordinator.

* required entry

Event Information

EVENT TITLE *

EVENT INFORMATION *

Enter information describing the purpose of the event. This information is displayed to all users.

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) - FOR ALL VIEWERS

Attach File

ATTACH FILE(S) - ONLY AFTER RSVP

Attach File

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

Event Settings

EVENT TYPE *	<div>Vendor Fair</div>	←
EVENT START *	<div>mm/dd/yyyy</div> at <div>--</div> : <div>--</div> <div>--</div> <div>--</div>	←
EVENT END *	<div>mm/dd/yyyy</div> at <div>--</div> : <div>--</div> <div>--</div>	
ATTENDANCE LIMIT *	<div></div> <p>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.</p>	
USER TYPES *	<div>Staff Users and Vendor Users</div>	←
REQUIRE RSVP *	<div>Yes</div>	←
RSVP CUT-OFF DATE *	<div>mm/dd/yyyy</div>	
EVENT COORDINATOR *	<div>OMWBE Admin1</div>	←
SECONDARY EVENT COORDINATOR	<div>Select an optional secondary event coordinator</div> <p>Secondary event coordinator can help edit settings and log attendance</p>	←
MOBILE CHECK-IN ACCESS *	<p>Check in attendees using a phone/tablet friendly tool:</p> <p><input type="radio"/> Active</p> <p>Enter a PIN between 4 and 8 numbers. Save the event to view access instructions.</p> <div></div> <p><input checked="" type="radio"/> Not Active</p>	
LINKED OUTREACH CAMPAIGNS	Create Outreach Campaign for Event Link to Existing Outreach Campaign	
GET EVENT LINK	Get link for use in external materials	

Save

Cancel Changes

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 **REQUIRE 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	
SEND CONFIRMATION NOTICE AFTER RSVP *	Yes ▾
SEND FIRST REMINDER NOTICE *	Yes ▾ - 7 days before event ▾
SEND SECOND REMINDER NOTICE *	Yes ▾ - 3 days before event ▾
SEND THIRD REMINDER NOTICE *	Yes ▾ - Same day of event ▾
SEND THANK YOU NOTICE AFTER EVENT *	Yes ▾

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	
EVENT NOTES	<small>* Enter additional information about this event for internal use, such as feedback, action items, etc. This information is not displayed publicly.</small>

Save

Cancel

Additional Information

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

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

Event Management: Edit Event

Settings

Attendance List

Event List

Event Settings >> Get link for use in external materials

Event Settings

EVENT TYPE *

-- Select event type --

EVENT START *

mm/dd/yyyy

at

--

:

--

--

--

EVENT END *

mm/dd/yyyy

at

--

:

--

--

ATTENDANCE LIMIT *

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 *

-- Select User Types --

Event will only be viewable by the selected user types.

REQUIRE RSVP *

Yes

RSVP CUT-OFF DATE *

mm/dd/yyyy

EVENT COORDINATOR *

OMWBE Admin1

SECONDARY EVENT COORDINATOR

Select an optional secondary event coordinator

Secondary event coordinator can help edit settings and log attendance

MOBILE CHECK-IN ACCESS*

☐ 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](#)

Cancel Event

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

Transactions: Events & Training Classes

Contracts Contract Audits Sub Requests Outreach Cert Apps Certs Cert Change Requests Cert Flags Support Messages

Events may be available to attend. Click the links in the Action column to view information and details of a particular event. You can adjust the filters and date range to expand or narrow the list. Click Reset Filters to return to the default filters.

Search

New Event

Show only my events

From: 9/8/2022 To: 11/14/2022 Go

To refresh click column title. To filter click drop down menu.

Actions	Status	RSVP	Event	Event Date	Type	Coordinator
	All	All	All		All	All
Settings Attendance	Open, 300 space(s) left 0 of 300 RSVPs		test event for solicitation	9/19/2022	Education	Nikol Stevens
Settings Attendance	Open, 300 space(s) left 0 of 300 RSVPs		test event training	9/19/2022	Training	Nikol Stevens

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

Event Management: Attendance List

Settings Attendance List Event List Help & Tools

test event for solicitation Open, 298 space(s) left 9/19/2022 1:00 pm Pacific 2 of 300 RSVPs

0 Event Views
Counts all views, including repeat views.

Views via Public Portal: 0
Views via System Users: 0

2 RSVPs
Counts all RSVPs from all sources.

100%

RSVPs via Public Portal: 0
RSVPs while Logged On: 0
RSVPs by Coordinator: 2

0 Attendees
Counts of attendees, no shows, and pending update.

No attendance has been logged yet.

The RSVP was successfully added.

Once the event has finished, or during the check-in process, mark the attendees as "attended" or "no show". The day after the event, all "attended" attendees will receive a Thank You notice, if configured.

Sort By: RSVP Date Registered through: Show All Attendance: Show All

Enter search term Search/Refresh Add Attendee Sign in Sheet

Attendees - currently 2

#	Name	Organization	Email	Phone	RSVP Date	Actions
2	Nakia Titus	OMWBE	nakiat@omwbe.wa.gov		9/15/2022	<input checked="" type="checkbox"/> Message
1	Douglas Mora	OMWBE	douglasrm@omwbe.wa.gov		9/15/2022	<input checked="" type="checkbox"/> Message

Attendees: Attended No Show Undo Message Cancel

Attendees: Attended No Show Undo Message Cancel

Add Attendee Mark All Attended Cancel All RSVPs

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

Send a Message

Enter message and click **Send Message**. It will be sent to all selected attendees.

MESSAGE +

cancelation text

Send Message Cancel

- Enter text
- Click **Send Message**

Event Management: Attendance List

Settings Attendance List Event List

test event for solicitation

- Go to **Settings** tab

Event Information	
EVENT TITLE *	test event for solicitation - canceled event - delete
EVENT INFORMATION *	<p>Enter information describing the purpose of the event. This information is displayed to all users.</p> <p>test event for solicitation</p>

- 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 <small>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.</small>
USER TYPES *	Staff Users, Vendor Users, and Public
REQUIRE RSVP *	Yes
RSVP CUT-OFF DATE *	9/16/2022
EVENT COORDINATOR *	Nikoel Stevens
SECONDARY EVENT COORDINATOR	Timolin Abrom (Assistant Director of Supplier Diversity)
MOBILE CHECK-IN ACCESS *	<small>Secondary event coordinator can help edit settings and log attendance</small> <small>Check in attendees using a phone/tablet friendly tool:</small> <input type="radio"/> Active <small>Enter a PIN between 4 and 8 numbers. Save the event to view access instructions.</small> <input type="text"/> <input checked="" type="radio"/> 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**

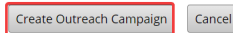
Outreach: Start

* required entry

Outreach Campaign Parameters	
OUTREACH CAMPAIGN TITLE *	<input type="text" value="test outreach campaign"/>
OUTREACH CONTROL *	<input checked="" type="radio"/> Outreach campaign can be viewed and edited by anyone in your organization. <input type="radio"/> Outreach campaign can be viewed by anyone BUT edited only by a designated user (currently you) or an administrator.
OUTREACH PUBLICITY *	<input checked="" type="radio"/> The outreach campaign can be viewed ONLY by selected vendors. <input type="radio"/> Viewable by all system vendors PLUS posted on the Public Outreach Bulletin Board for viewing by the public. <input type="radio"/> Posted only on the Public Outreach Bulletin Board for viewing by the public.
ALLOW RESPONSES? *	<input type="radio"/> No <input checked="" type="radio"/> Yes - allow responses to this campaign

Once all parts of the outreach campaign have been completed, you must **Release** the outreach campaign to trigger the send out of notifications and posting on the bulletin board, if applicable.

A copy of the outreach notice will be sent to you whenever notices go out.



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 *

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 *

FROM NAME *
This will be the "from name" on the email.

FROM EMAIL

REPLY-TO EMAIL *
This will be the email to which replies are routed.

(Copy Title)

OMWBE@diversitycompliance.com

To comply with spam laws, this verified email address cannot be changed.

nikoels@omwbe.wa.gov

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

Outreach Campaign Settings

OUTREACH OWNERSHIP * → Anyone in your organization ▾

OUTREACH PUBLICITY *
☒ The outreach campaign can be viewed ONLY by selected vendors.
☐ Viewable by all system vendors PLUS posted on the Public Outreach Bulletin Board for viewing by the public.
☐ Posted only on the Public Outreach Bulletin Board for viewing by the public.

NOTIFICATION TYPES *
☒ Notify vendors only by EMAIL. Assigned vendors without a valid email will not be notified.
☐ Do not notify vendors. Assigned vendors will view their notices only within the system or on the Bulletin Board.

ALLOW RESPONSES? *
☐ No
☒ Yes
*Instructions to responders must be included on the **Content** tab.*
Response Due Date

Document Submission Required
☐ Yes ☒ No

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

Outreach Dates

NOTIFICATION & POSTING DATE * Scheduled for:
This is also the date the outreach campaign is posted on the Outreach Bulletin Board.

FIRST REMINDER *
☐ Active, scheduled for:
☒ Not active

SECOND REMINDER *
☐ Active, scheduled for:
☒ Not active

THIRD REMINDER *
☐ Active, scheduled for:
☒ Not active

DEACTIVATION DATE *
Date outreach campaign will be taken off the Outreach Bulletin Board.

Save Cancel

- 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**

Outreach: Update Settings

Main

Settings

Content

test outreach campaign

- Select **Content** tab

Outreach: View Content

Main

Settings

Content

test outreach campaign

Outreach incomplete

Edit

View Text Version

Outreach Campaign Content

Content has not been entered. Click Edit button.

- Click **Edit**

Main

Settings

Content

test outreach campaign

Outreach pending release » [release campaign](#)

To attach files to your campaign, click **Attach Files** and upload all files needed (note that once the campaign is sent to recipients, attached files cannot be deleted). To add/embed images into your campaign content, click **Add Images** and follow the instructions displayed.

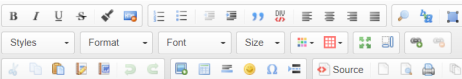
Save Draft

Save & Return

Attach Files

Add Images

Cancel



Hello!

This is a test outreach campaign. We hope you can join us!

OMWBE

- 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

Outreach: Update Settings



Outreach: Vendor Lists

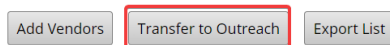
To **resort** click column title. To **filter** click drop down menu.

Action	▲ List Title
	All ▼
View	2022 Transportation RFP List
View	Outreach Project Initiation Vendors
View	test list
View	test list
View	testing 2
View	testing 2
View	WSDOT - 8/12/2022: Independent Review of Cascadia Ultra-High-Speed Ground Transportation System

1 - 7 of 7 records displayed: Previous Page < Page 1 > Next Page

- Select **View** for list

Outreach: Vendor List



Vendor List		
TITLE	test list	
DESCRIPTION	test list for solicitation	
LIST OWNER	Nikoe! Stevens	
EDITING	Vendor list can be edited only by the list owner.	
ACCESS	Vendor list can be viewed and used only by the list owner.	

To resort click column title. To filter click drop down menu.

System Vendor #	▲ Vendor	Comment
	All ▼	
20440898	B2Gnow Test Prime Vendor5	test

1 - 1 of 1 records displayed: Previous Page < Page 1 > Next Page

Copy Vendor List Delete ALL Assigned Vendors Delete Vendor List

- Click on **Transfer to Outreach**

Outreach Management: Add Vendors to Outreach Campaign

* required entry

Parameters

VENDOR COUNT 1

VENDOR CONTACT TYPE * -- Select a vendor contact type --

OUTREACH CAMPAIGN *

COMMENT / LABEL

General
Certification
Contracts
Owner
Sales
Billing
Prevailing Wage
Insurance/Risk Management

Add Vendors to Outreach Campaign

- 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.

Outreach Management: Add Vendors to Outreach Campaign

* required entry

Parameters

VENDOR COUNT 1

VENDOR CONTACT TYPE *

OUTREACH CAMPAIGN * test outreach campaign

COMMENT / LABEL

-- Select an outreach campaign --
grgr
New Vendor Orientation Bid Opportunity
test outreach campaign

Add Vendors to Outreach Campaign

- Select **Outreach Campaign**

- Add Comment / Label

* required entry

Parameters	
VENDOR COUNT	1
VENDOR CONTACT TYPE *	-- Select a vendor contact type -- ▾
OUTREACH CAMPAIGN *	test outreach campaign ▾
COMMENT / LABEL	<div>Use this to tag contacts for later reference of where they were sourced from.</div>

Add Vendors to Outreach Campaign Return

- Click **Add Vendors to Outreach Campaign**

Outreach Management

Main Settings Content

test outreach campaign

- Return to **Main** tab

Outreach Management

Main Settings Content

test outreach campaign Outreach pending release release campaign

Outreach Campaign Information	
OUTREACH CAMPAIGN TITLE	test outreach campaign
STATUS	Outreach pending release release campaign
SYSTEM TRANSACTION NUMBER	07259742-0001
DATE CREATED	9/15/2022

Outreach Management

Main Settings Content Statistics

test outreach campaign

Awaiting posting date

Outreach Campaign Information

OUTREACH CAMPAIGN TITLE	test outreach campaign
STATUS	Awaiting posting date (Reverse Release)
SYSTEM TRANSACTION NUMBER	07259742-0001
DATE CREATED	9/15/2022

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.

Expiration:	<input type="text"/>
Bonded:	<input type="checkbox"/>
Bond Expiration:	<input type="text"/>
Prevailing Wage:	<input type="checkbox"/>
Rate 1:	<input type="text"/>
Rate 2:	<input type="text"/>
Subcontractor:	<div> -- Select an Item -- -- Select an Item -- Yes (Y) No (N) </div>
Contract Tracking Information	
Contract Sent to Contractor:	<input type="text"/>
Contractor Signed:	<input type="text"/>
Signed Contract Received:	<input type="text"/>

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.
- Contract 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

Contract Information

You must enter a contract title and maximum value. The assigned department field is optional.

CONTRACT TITLE *	<input type="text"/>
CONTRACT NUMBER *	<input type="text"/>
CONTRACT VALUE (\$) *	<input type="text"/>
CONTRACT SECONDARY STATUS	None selected ▾
CONTRACT HOLDER/OWNER *	Washington State University <small>Name shown to contractors as the contract owner/paying organization when responding to compliance audits</small>
DEPARTMENT *	None selected ▾

- 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

Contract Dates

Enter a contract start date and end date. These are the dates that you want the auditing (if selected) to begin and end.

AWARD/START DATE *	<input type="text" value="mm/dd/yyyy"/>	(PROJECTED) END DATE *	<input type="radio"/> Date: <input type="text" value="mm/dd/yyyy"/> <input type="radio"/> Duration: <input type="text" value=""/> year(s) ▾
NOTICE TO PROCEED DATE	<input type="text" value="mm/dd/yyyy"/>	PRE-BID DATE	<input type="text" value="mm/dd/yyyy"/>
SUBSTANTIAL COMPLETION	<input type="text" value="mm/dd/yyyy"/>	FINAL ACCEPTANCE	<input type="text" value="mm/dd/yyyy"/>

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

Prime Contractor Information

The contract must be assigned to a prime contractor. Click **Get Vendor** to search and select a user.

PRIME CONTRACTOR *	Get Vendor from vendor database
--------------------	---

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

Search for vendors using names, location, classification, and/or other criteria. Enter information into any of the boxes below and click one of the search buttons. Some parameters may be required.

Quick Search Options

Click a button to initiate an immediate search:

- Search by **Certified Directory**

Search Parameters

BUSINESS NAME/DBA

Enter business name, DBA name, Tax ID number, or System Vendor Number; all searches are wildcard (e.g. *text*).

CONTACT PERSON

First name

Last name

Contact Type

Users

CITY

STATE/PROVINCE

Select one or more

ZIP CODE/POSTAL CODE

Search for multiple zip codes and post codes by separating with commas

DISTANCE SEARCH

Within 5 miles of zipcode (this new parameter is currently in beta test)

PHONE AREA CODE

COMMODITY CODES

Click to Lookup Commodity Codes

BUSINESS DESCRIPTION

If one of more certification options are selected below, search of above location parameters will be based on certification data; otherwise vendor profile data will be used.

- By specific **Search Parameters**

Certification Parameters

CERTIFICATIONS

Use the field below to identify organizations and certification types for this search. Click an organization name to select/unselect all of its types.

Select one or more

CERTIFICATION ACTION

Directory match option:

Match ANY certification type selected above

CERTIFICATION STATUS

Select one or more

All (certified, pending, expired, other)

Status options with ++ require dates entered below; ** indicates dates are optional.

Optional Date Range: mm/dd/yyyy to mm/dd/yyyy

☐ Limit renewing/expiring/renewed/expired (w/out pending or approved certification processing record) search filter to same certification type.

☐ Use ORIGINAL renewal/expiration date for renewing/expiring/renewed/expired search filter.

☐ Use Expiration Date instead of Renewal Date in search

- By **Certification Parameters**

Certification Types Recognized For This Record

All certification types below (see 'Certifications' field) are recognized on this contract for firms that are active as of today.

Certification Parameters

CERTIFICATIONS

Use the field below to identify organizations and certification types for this search. Click an organization

[State of Washington DES], [Washington State Office of Minority & Women's Bu

Washington State Office of Minority & Women's Business Enterprises

☐ Airport Concessionaire Disadvantaged Business Enterprise (ACDBE)

☒ Combination Business Enterprise (CBE)

☐ Disadvantage Business Enterprise - Alaska (Alaska DBE)

☐ Disadvantaged Business Enterprise (DBE)

☒ Minority Business Enterprise (MBE)

☒ Minority/Women Business Enterprise (MWBE)

☐ Small Business Enterprise (SBE)

☒ Socially and Economically Disadvantaged Business Enterprise (SEDBE)

☒ Women Business Enterprise (WBE)

CERTIFICATION ACTION

CERTIFICATION STATUS

- 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]

Advanced Search Parameters

ETHNICITY	Select one or more
GENDER	Select one or more
VENDOR STATUS	All Vendors
SITE VISIT	-- Select Option -- a site visit between mm/dd/yyyy and mm/dd/yyyy for any purpose
COUNTY	Select one or more
FEIN/TAX ID NUMBER	
OTHER IDENTIFIERS	DUNS Number, Unique Entry Identifier, CAGE Code
SYSTEM VENDOR NUMBER	
FAVORITE VENDORS	<input type="checkbox"/> Limit results to any vendor marked as favorite: by me only
LIMIT TO "CONNECTED" VENDORS	<input type="checkbox"/> "Connected" vendors include firms that are assigned to your records in this system and will exclude all other vendors.

• By Advanced Search Parameters

Business Name	Location	Phone Number	Actions
TOKUSAKU CONSULTING	SEATTLE, WA	206-805-1888	Select Vendor
TOKUSAKU INC.	SEATTLE, WA	206-805-1888	Select Vendor
DBA TOKUSAKU CONSULTING			

• Select Vendor

Prime Contractor Information

The contract must be assigned to a prime contractor. Click [Get Vendor](#) to search and select a user.

PRIME CONTRACTOR *	TokuSaku Inc. (Change Vendor)
PRIME COMPLIANCE CONTACT *	Primary compliance contact (required): None selected (optional)
	Contact not listed? QuickAdd a new compliance contact.
	Secondary compliance contact (optional): None selected (optional)
	This contact will receive copies of all compliance notices.
PRIME ADDRESS *	None selected
	Address not listed? QuickAdd a new address.

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

Organization Contacts

The contract must be assigned to a buyer/contract administrator; select a user from the list. Additional contacts can be designated.

BUYER/PROJECT MANAGER (IN-SYSTEM USER) * → None selected ▼

ADDITIONAL ORGANIZATION CONTACTS

Contact #	Name	Role/Title	Department
Contact #1:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Contact #2:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Contact #3:	<input type="text"/>	<input type="text"/>	<input type="text"/>

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

Contract Settings

DIVERSITY GOAL(S) * Goals have not been added to this contract. [Click here to select goal types.](#)

[» HELP WITH GOALS](#)

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

Contract: Goal Type Assignment

To add a goal type to the contract, select one from the drop down menu and click **Assign Goal**.

Assigned Contract Goals

Goal Type to Assign → DBE ▼ Assign Goal

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

Contract Settings

DIVERSITY GOAL(S) * » [HELP WITH GOALS](#)
» [EDIT GOAL TYPES](#)

Goal Type	Proposed/Committed Goal	Actual Goal
MBE:	<input type="text" value="5"/> %	<input type="text" value="5"/> %
MWBE:	<input type="text" value="5"/> %	<input type="text" value="5"/> %
WBE:	<input type="text" value="5"/> %	<input type="text" value="5"/> %
VBE:	<input type="text" value="5"/> %	<input type="text" value="5"/> %

EXTERNAL FUNDING SOURCES » [HELP WITH FUNDING SOURCES](#)

Funding source based on -- select one -- ▼

Category	\$ Value	% Proportion
Federal: \$	<input type="text"/>	<input type="text"/> % ← Calculate
State: \$	<input type="text"/>	<input type="text"/> %
Local: \$	<input type="text"/>	<input type="text"/> %

FHWA: %

FTA: %

FAA: %

FRA: %

HUD: %

Other: %


- **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.

CONTRACT TYPE •	None selected
CONTRACT CATEGORY •	None selected
CONTRACT VISIBLE TO CONTRACTORS •	<input checked="" type="radio"/> Yes - visible to prime and subcontractors (organization setting is currently "off", which overrides this contract-specific setting) <input type="radio"/> Yes - visible to prime contractor only; may conflict with compliance audit settings (organization setting is currently "off", which overrides this contract-specific setting) <input type="radio"/> No
PRIME PERMITTED TO SELF-REQUEST ADDITIONAL SUBCONTRACTORS •	<input type="radio"/> Yes - Prime can self-request additional subcontractors electronically; ALL are subject to approval by authorized staff. <input checked="" type="radio"/> Yes [default] - Prime can self-request additional subcontractors electronically. For Credit subcontractors are subject to approval by authorized staff; other subcontractors will automatically be added to the contract. <input type="radio"/> Yes - Prime can self-request additional subcontractors electronically; ALL are auto-approved and added to the contract. <input type="radio"/> No - All subcontractor additional requests must be submitted in writing.
PRIME PERMITTED TO REQUEST SUBCONTRACTOR SUBSTITUTIONS •	<input type="radio"/> Yes - Prime can request subcontractor substitutions electronically; ALL are subject to approval by authorized staff. <input checked="" type="radio"/> Yes [default] - Prime can request subcontractor substitutions electronically. For Credit subcontractor substitutions are subject to approval by authorized staff; other requests will be automatically processed. <input type="radio"/> Yes - Prime can request subcontractor substitutions electronically; ALL are auto-approved and processed upon submission. <input type="radio"/> No - All subcontractor substitution requests must be submitted in writing.
PRIME PERMITTED TO REQUEST SUBCONTRACTOR REMOVAL •	<input type="radio"/> Yes - Prime can request subcontractor removals electronically; ALL are subject to approval by authorized staff. <input checked="" type="radio"/> Yes [default] - Prime can request subcontractor removals electronically. For Credit subcontractor removals are subject to approval by authorized staff; other requests will be automatically processed. <input type="radio"/> Yes - Prime can request subcontractor removals electronically; ALL are auto-approved and processed upon submission. <input type="radio"/> No - All subcontractor removal requests must be submitted in writing.
COUNTY •	Select one or more

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

Compliance Audit Settings	
COMPLIANCE AUDIT •	<input checked="" type="radio"/> Automatically [default] - create audits every month [default] starting from first payment to prime [default] and ending when contract is manually closed [default] <input type="radio"/> On Demand - create audits upon staff [default] request or financial system trigger for each month [default]
(Audit period interval cannot be changed once contract is created.)	
CONTRACT AGENT	Nikael Stevens
SECONDARY CONTRACT AGENT	Doug Mora

- **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

PAYMENTS TO PRIME CONTRACTORS •	<input checked="" type="radio"/> Entered by staff or from financial system [default] <input type="radio"/> Self-reported online by prime contractor (until reported by staff or financial system)
PAYMENTS TO SUBCONTRACTORS •	<input type="radio"/> Entered only by staff <input checked="" type="radio"/> Self-reported online by prime contractor [default] <div> Payments to Lower Tier Subcontractors <input type="radio"/> Only prime can add subs and report subcontractor payments at all tiers <input checked="" type="radio"/> Prime can add subs and report all tiers, lower level subcontractor can add and report its own subs [default] </div>
CONFIRMATION BY SUBCONTRACTORS •	<input checked="" type="radio"/> Yes [default] - ALL subcontractors will be contacted to confirm payment amounts. <input type="radio"/> Yes - For credit subcontractors will be contacted to confirm payment amounts; other subcontractors will not be required to confirm payment amounts. <input type="radio"/> No
SUBCONTRACTOR ZERO PAYMENT AUTO-CONFIRMATION •	<input checked="" type="radio"/> Yes [default] - zero value payments will be auto-confirmed. <input type="radio"/> No - zero value payments must be confirmed by subcontractors.
PROMPT PAYMENT TRACKING •	<input checked="" type="radio"/> Yes [default] - prime contractor and subcontractors will be required to submit prompt payment information. Prompt payment time period is <input type="text" value="30"/> days. <input type="radio"/> No
COLLECT RETAINAGE INFORMATION •	<input checked="" type="radio"/> Yes [default] - subcontractors will be able to report retainage information. <input type="radio"/> No
ALLOW SUB TO DESIGNATE FINAL PAYMENT •	<input checked="" type="radio"/> Yes [default] - subcontractor can designate their final payment with <input type="text" value="no documentation required [default]"/>  <input type="radio"/> No
PARTIAL PAYMENT TRACKING •	<input checked="" type="radio"/> Yes [default] - subcontractor can designate partial payment. <input type="radio"/> No
RAPID REPORTING ACTIVE •	<input checked="" type="radio"/> Yes [default] - contractors can respond using the Rapid Reporting process. <input type="radio"/> No - contractors must log in for all reporting.

- 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]

Contract Summary

COMMODITY CODES

Add Commodity Codes

No Codes Assigned

- Add Commodity Codes**

Commodity Codes: Search

Search for codes by code number or keyword. Click **Browse Codes** 1

consulting

Search

NAICS: North American Industry Classification System ▼


- Search code or keyword

consulting

NAICS: North American Industry Classification System ▾

21 - 40 of 113 records displayed - [Previous Page](#) < Page 2 > [Next Page](#)

To sort, click column title.

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)

NAICS 541611 assigned to record.

If multiple code lists are available, you can change the selected list in the drop down list under the search box. When finished, click **Return** to return to the record.



- Return to Contract Record

Contract Files

Attach any related contract files by clicking Attach File.

CONTRACT DOCUMENT

GENERAL FILES

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

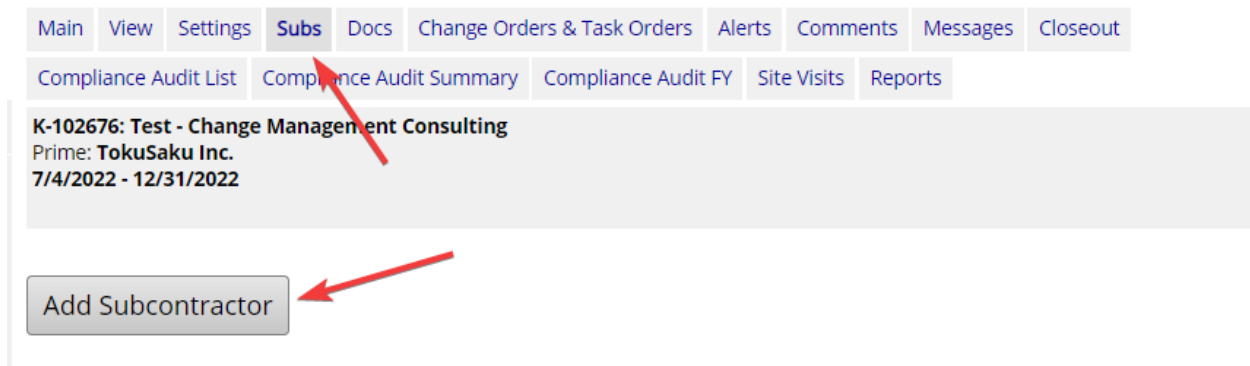
- Click **Edit**, **Save**, or **Cancel** depending on review.

Add Subcontractor

Recommendation: Have Prime contractor add subcontractor(s).

See [Prime Contractor Guide](#).

Contract Management: Subcontractor List



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

K-102676: Test - Change Management Consulting
 Prime: **TokuSaku Inc.**
 7/4/2022 - 12/31/2022

Add Subcontractor

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

* required entry

Vendor Information

VENDOR * [Get Vendor](#) from vendor database

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

* required entry

Vendor Information

VENDOR * 2nd Sight Lab, LLC ([Change Vendor](#))

VENDOR COMPLIANCE CONTACT *

Primary compliance contact (required):
 Teri Radichel - CEO ▾
 Contact not listed? [QuickAdd](#) a new compliance contact.

Secondary compliance contact (optional):
 None selected ▾
 This contact will receive copies of all compliance notices.

VENDOR ADDRESS * 4701 SW Admiral Way #24, Seattle, WA 98116 ▾
 Address not listed? [QuickAdd](#) a new address.

- 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.

Subcontract Information

SUBCONTRACTOR TIER * → Subcontracts to: [Prime] TokuSaku Inc.

REFERENCE IDENTIFIER

CONTRACTED PERCENT & AMOUNT *

☒ By Amount: \$ 10000
☐ By Percent: %
Enter the full amount/percent of the subcontract or the percent relative to the total contract value (\$100,000). Do not deduct amount/percent of lower tier subcontracts assigned under this subcontractor.

TYPE OF PARTICIPATION * → Subcontractor/Subconsultant

Percent of payments to be counted: 100.00 %

- 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**

Settings

INCLUDE IN COMPLIANCE AUDITS? •
☒ Yes - subcontractor is active and should be included in the periodic compliance audits of the contract.
☐ No - subcontractor is inactive.

COUNT TOWARDS CERTIFIED GOAL •
This setting is used only to set the default status on future compliance audits and the starting/final amount fields below. To change the status of all or specific existing payments, access the payment history for the contractor.
☒ Yes - Payments to this contractor count towards the selected goal (field below).
Goal Type (required if for credit):

☐ No

ADD VENDOR TO EXISTING COMPLIANCE AUDITS FOR THIS CONTRACT? •
☒ Yes - add this subcontractor to all audits going back to the period of July 2022
☐ No - subcontractor's first compliance audit will be the next one.

FINAL PAYMENT MADE? •
☐ Yes
☒ No

SUBCONTRACT AWARD DATE

WORK START DATE

WORK END DATE

WORK DESCRIPTION

WORK CODES
Currently assigned work codes:
No Codes Assigned
The work codes below are from recognized certifications for this firm. Select one or more work codes that match the work this firm will be performing for this assignment and click **Assign Selected Work Codes** to add to this record.
[Click here](#) to refresh the list if the assigned vendor or for credit status has been changed.
☒ NAICS 334111 Electronic Computer Manufacturing
☒ NAICS 339999 All Other Miscellaneous Manufacturing

- **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**.

Additional Information	
ATTACH FILE(S)	Attach File
COMMENTS	

- 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.

Contract Status & Actions			
	Status	Actions	
CONTRACT STATUS	Open	View Contract Edit Contract Close Out Change Secondary Status to:	
COMPLIANCE OFFICER	Assigned	None selected	Officer to: Assigned to: Nikol Stevens
COMPLIANCE MONITORING	Automatically (Monthly)	None selected	
SUBCONTRACTORS	5 subs	Delinquent	
		Expired	
		Locked In	
		Pending	
		Terminated	

- 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

Vendor Registration: Start

* required entry

Business Information

BUSINESS NAME *

DBA NAME

TAX ID NUMBER
(9 digit Federal Tax ID; firms are strongly encouraged not to use SSN as the tax ID. Tax ID Numbers can be easily [obtained from the IRS](#) at no charge.)

UNIQUE ENTITY IDENTIFIER
([More information about Unique Entity Identifiers](#))

DUNS NUMBER
([Look up a Dun & Bradstreet number](#))

COMPANY TYPE None selected

COMPANY OWNERSHIP ETHNICITY None selected

COMPANY OWNERSHIP GENDER None selected

- 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**

Business Contact Information	
MAIN COMPANY EMAIL *	<input type="text"/>
MAIN PHONE *	<input type="text"/> <input type="text"/>
MAIN FAX	<input type="text"/> <input type="text"/>
MAIN COMPANY WEBSITE	<input type="text"/>
COMPANY ADDRESS *	<input type="text" value="Enter a location"/> <input type="text"/> <input type="text"/>
CITY *	<input type="text"/>
STATE/PROVINCE *	U.S. States/Provinces <input type="text"/> or Canadian Provinces <input type="text"/> <input type="text"/> or <input type="text"/>
ZIP CODE/POSTAL CODE *	U.S. Zip Code <input type="text"/> or Canadian Postal Code <input type="text"/> <input type="text"/> or <input type="text"/>
COUNTRY *	<input type="text" value="United States"/>

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

Company Contact Person	
NAME *	First name <input type="text"/> Last name <input type="text"/> <input type="text"/>
TITLE	<input type="text"/>
EMAIL (USERNAME) *	<input type="text" value="(copy from above)"/>
PHONE NUMBER	<input type="text" value="(copy from above)"/> <input type="text"/> Ext. <input type="text"/> <input type="text"/> <input type="text"/>
MOBILE NUMBER	<input type="text"/> <input type="text"/>
FAX NUMBER	<input type="text" value="(copy from above)"/> <input type="text"/> <input type="text"/> <input type="text"/>
TIME ZONE *	<input type="text" value="US/Pacific"/>

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

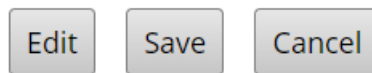
- Enter **EMAIL** – this will be their username
- Select **TIME ZONE** from drop-down
- Click **Review**

***** WARNING *****
 The information provided partially matches one or more existing vendors in the system.

To prevent duplicate accounts, you are encouraged to search the vendor database again. All matches are listed below, or you can edit the data and resubmit. If you are sure that this is a new vendor, you may continue and save the record. Please contact [Technical Support](#) for confirmation and assistance.

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

Favorite Vendors

Support

Messages

Search >>

Vendors

Certified Vendors

Users

Contracts

Outreach Campaigns

Search Results >>

Reporting >>

Recent & Favorites

Full List

View Report Output

Scheduled Reports

Saved Output

Ad Hoc Reporting

Create >>

New Vendor

New Contract

New Outreach

New Event

Search Parameters

BUSINESS NAME/DBA Ninja Consultants

CONTACT PERSON

First name

Last name

Contact Type Users

CITY

STATE/PROVINCE

ZIP CODE/POSTAL CODE

DISTANCE SEARCH

Within 5 miles of zipcode (this new parameter is current)

PHONE AREA CODE

COMMODITY CODES

Click to Lookup Commodity Codes

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

Search: Vendors Help & Tools

Users Vendors Contracts Outreach

Listed below are all of the vendors that match your search criteria. Use the sort and filter functions of the table to reduce the size of the list. You can view more listings by using the navigation line at the bottom of the table.

Business Name	Location	Phone Number	Actions
NINJA CONSULTANTS <small>DBA JACKS OF ALL TRADES</small>	CALABASAS, CA	360-555-5555	Go To...

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

Ninja Consultants

DBA Jacks of All Trades

E: ninjas@ninjaconsultants.net
P: 360-555-5555
77 Jamiroquai Drive
Calabasas, CA 91301 [\[map\]](#)

Close

[Mark As Favorite](#)

Select a module, function, or record type to navigate to.

System Vendor Number: 21278779

Business Information
View & Edit

Vendor Profile
QuickView

Users

Certifications

Contracts

Documents

Comments

• Select Users

Vendor Profile: Users

[Help & Tools](#)

[General](#) [Public Profile](#) [Users](#) [Commodity Codes](#) [Contacts & Owners](#) [Comments](#) [Certifications](#) [Contracts](#) [Site Visits](#) [Docs](#) [Reports](#)

Ninja Consultants, DBA Jacks of All Trades

System Vendor Number: 21278779

[Mark As Favorite](#)

Listed are all user accounts for this vendor. To view a user's information, click the user's name. Inactive users that have not accessed their account within the past two years are shaded.

[Add User](#)

Users					
Name	Title	Contact Role(s)	Last Login	User Number	Actions
Toolkit, Jeff (inactive user)		Certifications, Contracts, General, Insurance, Invoicing, Owner, Prevailing Wage, Sales, Utilization Plans		21278779-0001	Message Copy Deactivate

• Click the link of the user's name

* required entry

Contact Information [Copy User](#) [User Administration](#)

Enter the user's contact information. The email address serves as the the username.

NAME *	Salutation	First name *	Last name *	Suffix
		Jeff	Toolkit	
USERNAME/EMAIL *	equitytoolkit@omwbe.wa.gov			
TITLE				
PHONE NUMBER *	360	819-3465	Ext.	
MOBILE NUMBER				
FAX NUMBER				

• Click User Administration

The user's account information can be administered from this page.

* required entry

Business and User Information

BUSINESS NAME	Ninja Consultants
VENDOR NUMBER	21278779
CONTACT NAME	Jeff Toolkit
USER NUMBER	21278779-0001

User Login Information

USERNAME	equitytoolkit@omwbe.wa.gov (change username)
PASSWORD	Reset Password & Send Notice

This will generate a one-time use password and send a notice to the user. Their old password will no longer work, and they will be required to change their password upon login.

User Account Information

Enter a new password and click **Change Password**. A notification will be automatically sent by email and/or fax to the user.

FAILED LOGIN ATTEMPTS	0 (reset)
-----------------------	-----------------------------

• Click Reset Password & Send Notice

Change Orders & Task Orders

Contract Management: Associated Records List

- [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](#)

K-102676: Test - Change Management Consulting
Prime: TokuSaku Inc.
7/4/2022 - 12/31/2022

Below are listed change order and task orders associated with this contract.

Change Orders

No change orders present for this contract.

Change Contract Value

Extend/Shorten Contract

Task Orders

No task orders present for this contract.

New Task Order

Link Existing Contract As Task Order

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

ADJUST MASTER CONTRACT VALUE *

☐

Yes - adjust master contract by amount of this task order (Subcontractors are assigned to the master contract by dollar amount. You will have to manually update those records to maintain consistency.)

☐

No - leave master contract at current value

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

Alerts

Contract: Alerts

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

K-102676: Test - Business Process Mapping

Prime: Kone Inc

8/10/2022 - 10/28/2022

Add New Alert

Configured Alerts

No Alerts Configured

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

Select an alert type and enter the details. Click **Save Alert** to complete the process.

General alert

[Contract end alert](#)

[Contract progress alert](#)

A General Alert will trigger on the selected date and you will be notified. Alerts are removed after a period of time; if you require a permanent note, click the **Comments** tab. Contract can be open or closed at time of trigger.

Recipient(s) *

☐ Send alert to yourself

[+ add more recipients \(other staff, prime, subcontractors\)](#)

Trigger Date *

mm/dd/yyyy

Alert Note *

Included in any notification

Save Alert

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

Add New Alert

Select an alert type and enter the details. Click **Save Alert** to complete the process.

[General
alert](#)

[Contract
end alert](#)

[Contract
progress
alert](#)

A Contract End Alert will trigger at a point prior to the end date of the contract. Contract must be open at time of trigger.

Recipient(s) *

☐ Send alert to yourself

» [add more recipients \(other staff, prime, subcontractors\)](#)

Days Prior to End Date *

(enter a number)

Alert Note

Included in any notification

Save Alert

- **Contract End Alert**

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

Select an alert type and enter the details. Click **Save Alert** to complete the process.

[General
alert](#)

[Contract
end alert](#)

[Contract
progress
alert](#)

A Contract Progress Alert will trigger when payments to the prime contractor exceed the specified progress percent level. Contract must be open at time of trigger.

Recipient(s) *

☐ Send alert to yourself

» [add more recipients \(other staff, prime, subcontractors\)](#)

Progress Percent *

%

Alert Note

Included in any notification

Save Alert

- **Contract Progress Alert**

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

Comments

Contract Management: Comments

[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](#)

K-102676: Test - Business Process Mapping

Prime: Kone Inc

8/10/2022 - 10/28/2022

Add New Comment

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

Add Comment

Close

Enter comment information and parameters. Click **Save Comment** to complete the process.

Comments

COMMENT TYPE *

☐ Standard Comment

☐ Comment with Due Date:

☐ Add alert for this comment.

COMMENTS *

Save Comment

Cancel

Comments				
User	Date Last Edited	Due Date	Comment	Actions
Nikol Stevens	8/10/2022	8/11/2022	Test comment	Edit Delete Calendar

Save to Calendar

Select the appropriate calendar option.

Add to Google

Add to Office 365

Download Calendar Invite

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

Messages

Contract Management: Messages

MainViewSettingsSubsDocsChange Orders & Task OrdersAlertsComments**Messages**Closeout

Compliance Audit ListCompliance Audit SummaryCompliance Audit FYSite VisitsReports

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

Messaging: Read Message

Send a MessageContact SupportWish ListSubmit FeedbackReport a Problem

Below is the contents of a message. You can reply to it or forward it to someone else.

Messaging: Compose & Send Message

Send a MessageContact SupportWish ListSubmit FeedbackReport a Problem

Enter the details of your message. Click **Review Message Before Sending** to continue. The recipient list for this message has been saved, and you can add other recipients at any time. Other actions are available if you are not ready to send the message at this time.

TO *

MESSAGE SUBJECT *

MESSAGE *

ATTACH FILE

Emails:

Enter any additional email addresses for this message; separate email addresses with commas.

Attach File

Files will be attached to the system record and available for download from the system. A link to download the file from the system will be included in the notification to the recipient. The file will not be distributed by email or fax due to security restrictions.

Review Message Before Sending

Clear AllClear Message

Save Draft & CancelClear & Cancel

- Select **Send a Message** tab to

Compliance Audit List

Contract Management: Compliance Audit List

MainViewSettingsSubsDocsChange Orders & Task OrdersAlertsComments**Messages**Closeout

Compliance Audit ListCompliance Audit SummaryCompliance Audit FYSite VisitsReports

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

Amounts listed for subcontractors are the aggregate total payments made at all subcontract tiers. Payments that flow down through multiple tiers are counted at each level.

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
TOTALS		\$238,761,159	2417	2392	\$137,133,567	25		2363	\$135,880,342	29	\$1,253,225

V.5

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- 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	8/1/2022	View Audit
Jun 2022	\$3,586,304	120	120	\$5,564,247	0	116	\$5,541,609	4	\$22,637	0	\$0	7/1/2022	View Audit
May 2022	\$5,545,154	121	121	\$4,277,748	0	121	\$4,277,748	0	\$0	0	\$0	6/1/2022	View Audit
Apr 2022	\$4,782,260	119	119	\$5,854,212	0	119	\$5,854,212	0	\$0	0	\$0	5/1/2022	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 SDBE 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 SDBE 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 SDBE 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	<div><div></div>39%</div>						
For Credit Progress	<div><div></div>20%</div>						

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							
<div> Main View Settings Subs Docs Change Orders & Task Orders Alerts Comments Messages Closeout </div> <div> Compliance Audit List Compliance Audit Summary Compliance Audit FY Site Visits Reports </div>							
<div> 009242-DB I-405, RENTON TO BELLEVUE WIDENING AND EXPRESS TOLL LANES PROJECT Prime: Ralston West, Inc. 10/5/2019 - 6/30/2025 </div> <div> Status: Open/Locked In Current Award: \$726,035,434 Total Paid: \$238,761,159 For Credit: \$38,560,181 </div>							
<div> << View Previous Fiscal Year << >> View Next Fiscal Year >> </div>							
Compliance Audit Summary - 10/1/2021 to 9/30/2022							
	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 SDBE 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 SDBE 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	7.350%	2.644% below goal		
For Credit to SDBE 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

Contract Management: Site Visits

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

K-102676: Test - Business Process Mapping
Prime: Kone Inc
8/10/2022 - 10/28/2022

Status: Open
Current Award: \$55,000
Goal: 30.00% Total Paid: \$0
% Credit: 0.00% For Credit: \$0

Add Site Visit

Site Visits (last 10 years)

No site visit reports found.

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

Reports

Contract Management: Report List

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**

K-102676: Test - Business Process Mapping
Prime: Kone Inc
8/10/2022 - 10/28/2022

Status: Open
Current Award: \$55,000
Goal: 30.00% Total Paid: \$0
% Credit: 0.00% For Credit: \$0

Contracts

Contract Data History	Lists archive history records triggered by all user and system updates of the contract record. Some lines may show no visible change. Export the list to Excel for best viewing and manipulation.
Contract Summary	Overall contract summary of subcontractor participation.
Contractor List	List of all contractors on contract. Can be exported to multiple formats.
Payments Detail	All payments recorded on this contract for Primes, Self Performing Primes, and Subcontractors within a selected date range.
Subcontractor Addition, Substitution, and Removal Requests	List of all subcontractor addition, substitution, and removal requests on this contract within selected date range.
Subcontractor Invoice - Payment Tabulation	Comparison of reported invoice and payment amounts. [Note: only relevant if invoice function is active.]
U.S. DOT Uniform Report of DBE Awards/Commitments and Payments (2014 Version for Single Contract)	US DOT report for semi-annual (FHWA & FTA) and annual (FAA) submission, updated for 2014 DBE rule. Includes ability to run for SINGLE contract with filters for funding sources and goal types.
U.S. DOT Uniform Report of DBE Awards/Commitments and Payments (2014 Version for Single Contract) - Worksheets	US DOT report worksheets for semi-annual (FHWA & FTA) and annual (FAA) submission, updated for 2014 DBE rule. Includes ability to run for SINGLE contract with filters for funding sources and goal typ
U.S. DOT Uniform Report of DBE Awards/Commitments and Payments (2014 Version with Change Orders for Single Contract)	US DOT report for semi-annual (FHWA & FTA) and annual (FAA) submission, updated for 2014 DBE rule. Includes ability to run for SINGLE contract with filters for funding sources, goal types, and contra
U.S. DOT Uniform Report of DBE Awards/Commitments and Payments (2014 Version with Change Orders for Single Contract) - Worksheets	US DOT report worksheets for semi-annual (FHWA & FTA) and annual (FAA) submission, updated for 2014 DBE rule. Includes ability to run for SINGLE contract with filters for funding sources, goal types,

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

Contract Audits – Secondary Contract Agent

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

Transactions: Contract Audits

Contracts | **Contract Audits** | Sub Requests | Proposals | Outreach | Support | Messages

☐ Show ONLY records assigned to you

1 - 20 of 902 records displayed: Previous Page < Page 1 > Next Page

To resort click on column title. To filter click on the drop down menu.

Reporting Status	Audit Period	Contract	Prime	Contract Title	Paid to Prime
All	Last month		All		
Pending prime (3)	July 2022	12252AA	WSP USA Inc. SR 432 Longview Grade Crossing - Design, RFQ, RFP Support		\$54,400.67
Audit complete	July 2022	12495	WSP USA Inc. Toll Financial Planning & Analysis		\$69,869.46
Pending prime (1)	July 2022	12195AL	WSP USA Inc. Southwest Region Communications Support		\$12,559.73
Pending prime (1)	July 2022	12195AM	WSP USA Inc. SWR On-Call Materials Testing and Inspection Support (Clark County Engineering Office)		Pending
Pending prime (10)	July 2022	9999846-1-PE	WSP USA Inc. E Marginal Way S. Corridor		Pending

- 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 > To report, click on column title. Refresh Download

Actions	Alert	Status	Secondary Status	Contract Number	Description	Prime	End Date	Amount
View	End within 12 mo.	Open	Locked In	K-080822	Advanced Technology Computers Inc Test - IT Services	All	All	8/8/22 - 6/30/23 \$100,000
View	End within 6 mo.	Open		K-102676	TekSolve Inc Test - Change Management Consulting			7/14/22 - 12/31/22 \$100,000

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

Contract Status & Actions		
	Status	Actions
CONTRACT STATUS	Open (Locked In)	View Contract , Edit Contract , Close Out Change Secondary Status to: Locked In
COMPLIANCE OFFICER	Assigned	Change Compliance Officer to: Nikoel Stevens
COMPLIANCE MONITORING	Automatically (Monthly)	
SUBCONTRACTORS	No subs	Manage Subcontractors
TASK ORDERS		Create Task Order
CONTRACT CHANGE ORDERS		Amend Contract , Change Value
CONTRACT EXTENSIONS/SHORTENINGS		Extend/Shorten Contract
OTHER FUNCTIONS		Delete Contract , Vendor Archive , Full Archive , Copy Contract

- Select **Close Out** link

Close Contract	
CONTRACT STATUS	Open
CLOSE DATE	8/8/2022
CONTRACT SECONDARY STATUS	Locked In
PRIME CONTRACTOR RATING	Not Rated
CLOSEOUT COMMENTS	Add close out comments here.
CLOSEOUT DOCUMENT(S)	Attach File

Close Out Contract
View Audit Summary With 'Final Audit' Text

- 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



Contract Management

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K-070122: TEST - Soybean Farm Construction
 Prime: TEST-ASHLEY
 7/1/2022 - 6/30/2023

Contract Information

CONTRACT TITLE	TEST - Soybean Farm Construction
CONTRACT NUMBER	K-070122
PRIME CONTRACTOR	TEST-ASHLEY
SYSTEM TRANSACTION NUMBER	07633399-0001
AWARD/START DATE	7/1/2022
(PROJECTED) END DATE	6/30/2023
CONTRACT VALUE	\$500,000.00

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

Amounts listed for subcontractors are the aggregate total payments made at all subcontract tiers. Payments that flow down through multiple tiers are counted at each level.

Compliance Audit List

Audit Period	Status	Paid To Prime	Total Lines	Lines
TOTALS		\$0	0	0
Feb 2023				Audit not posted for this period - Add Audit
Jan 2023				Audit not posted for this period - Add Audit

- Select **Add Audit** link

Amounts listed for subcontractors are the aggregate total payments made at all subcontract tiers. Payments that flow down through multiple tiers are counted at each level.

Compliance Audit List

Audit Period	Status	Paid To Prime	Total Lines	Lines	Reported By Prime Amount
TOTALS		\$0	0	0	
Feb 2023					Audit not posted for this period - Add Audit
					Add Audit and Notify Prime Add Audit and Do Not Notify Prime Add Audit For Specific Subcontractors

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

Amounts listed for subcontractors are the aggregate total payments made at all subcontract tiers. Payments that flow down through multiple tiers are counted at each level.

Compliance Audit List

Audit Period	Status	Paid To Prime	Total Lines	Lines	Reported By Prime Amount	Not Reported By Prime Lines	Date Posted	Actions
TOTALS		\$0	3	0		\$0	3	
Feb 2023	Not reported		3	0		\$0	3	3/3/2023 View Audit

- Select **View Audit link**

Compliance Audit Information	
COMPLIANCE AUDIT PERIOD	February 2023
COMPLIANCE AUDIT STATUS	<div>None selected Update</div> <div>0 discrepancy reported pending resolution</div> <div>3 payments to subcontractors remaining to be reported by prime</div> <div>Reporting deadline is 4/2/2023</div> <div>Audit will be locked 6/1/2023</div>
COMPLIANCE AUDIT REFERENCE	Add Reference
SYSTEM AUDIT NUMBER	07633399-0002
DATE POSTED	Local: 3/3/2023 12:03:48 PM PST System: 3/3/2023 2:03:48 PM CST
FINAL AUDIT?	No (mark audit as final)
PAYMENT TO PRIME	Not Reported Submit

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

Compliance Audit: Prime Payment Detail for February 2023

* required entry

Payment Information	
COMPLIANCE AUDIT TIME PERIOD	February 2023
PAYMENT TO PRIME	Not Reported
PAYMENT DATE	
COMMENTS	

Update Payment Data

You can add the amount paid to the prime.

AMOUNT FOR FEBRUARY 2023 *	\$ <input type="text" value="50000"/>
PAYMENT DATE	<input type="text" value="2/10/2023"/>
COMMENTS *	<input type="text" value="Payment for the period of 1/1/2023 - 1/31/2023"/>

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

- Click **Save** button

Compliance Audit: Audit Summary for February 2023
Main View
Compliance Audit
K-070122: TEST-ASHLEY
Prime: TEST-ASHLEY
7/1/2022 - 6/30/2023
Compliance Audit

Compliance Audit: Prime Payment Detail for February 2023
+ required entry

b2gnow.gob2g.com says
Save payment information?
OK
Cancel

Payment Information
COMPLIANCE AUDIT TIME PERIOD
February 2023
PAYMENT TO PRIME
Not Reported
PAYMENT DATE

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

Prime Contractor - February 2023

Prime Contractor	Cert	Inc. in Goal for Period	This Period	Prime's Share This Period	Total to February 2023	Prime's Share Total to February 2023
TEST-ASHLEY (Info) Ashley.Bazurto P 360-664-9773 ashley.bazurto@omwbe.wa.gov	✓	No	\$50,000.00 (Edit)	\$50,000.00	\$50,000.00	\$50,000.00

Click prime name to view payment history for this contract. Click contact person's name to send them a message.

Self-Performing Prime Contractor - Total Contract

Self-Performing Prime Contractor	Cert	Type	Inc. in Goal for Period	This Period	Total to February 2023
TEST-ASHLEY (Info) Ashley.Bazurto ashley.bazurto@omwbe.wa.gov P 360-664-9773	✓	Self-Perf Prime 100%	✓ MWBE	Not Reported (Edit)	\$0.00

Click prime name to view credited payment history for this contract. Click contact person's name to send them a message.

Subcontractors - February 2023

Subcontractor	Cert	Type	Inc. in Goal for Period	This Period	Total Retained Payments to February 2023
Test - Gina (Info) Gina Test gtest@omwbe.wa.gov P 360-111-1111	✓	Sub 100%	✓ MBE	Not Reported (Edit) Resend Subprime Notice	\$0.00
Amal's F&E LLC (Info) Amal Jouty amal.jouty@omwbe.wa.gov P 360-664-9756	✓	Sub 100%	✓ WBE	Not Reported (Edit)	\$0.00

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

+ required entry

Compliance Audit Information
COMPLIANCE AUDIT PERIOD
February 2023
COMPLIANCE AUDIT NUMBER
07633399-0002

Previous Payment Information
No audits prior to this time period.

Self Performing Prime Information
BUSINESS NAME
TEST-ASHLEY
VENDOR NUMBER
20537708

Audit Information
Add/edit payment lines and providing the remaining information for the designated time period. You can attached files or add comments, if necessary. Certain information will be required depending on the situation.

AMOUNT RETAINED AS SELF-PERFORMING PRIME
\$ 20000
SUPPORTING DOCUMENTS
Attach File
Attached documents are not visible to TEST-ASHLEY.
COMMENTS

- 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

Compliance Audit: Review Response

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K-070122: TEST - Soybean Farm Construction
 Prime: TEST-ASHLEY
 7/1/2022 - 6/30/2023

Review the compliance audit response and click **Save**. If you need to make a change, click any of the **Edit** buttons.

Compliance Audit Information		Self Performing Prime Information	
COMPLIANCE AUDIT TIME PERIOD	February 2023	BUSINESS NAME	TEST-ASHLEY
COMPLIANCE AUDIT NUMBER	07633399-0002	VENDOR NUMBER	20537708
		SUBCONTRACTOR TIER	Tier 1 subcontractor to TEST-ASHLEY

Data Reported	
PAID AMOUNT FOR FEBRUARY 2023	\$20,000.00
COMMENTS	

[Edit](#)
[Save](#)
[Cancel](#)

- Select **Save** button

The compliance audit response has been saved. Click a button to continue.

CONFIRMATION NUMBER	10130811
CONFIRMATION TYPE	Prime audit response of Contract K-070122 for February 2023 audit period.
USER	Nikoel Stevens
TIME STAMP	3/3/2023 1:29:32 PM PST

Return To Compliance Audit

Contract Payment History

View Audit Response

Return To Audit Notice

Next Subcontractor: **Test - Gina**

Next Subcontractor

- **Select Next Subcontractor**

Audit Information	
Add/edit payment lines and providing the remaining information for the designated time period. You can attached files or add comments, if necessary. Certain information will be required depending on the situation.	
AMOUNT PAID FOR FEBRUARY 2023 *	<input type="text" value="\$ 15000"/> <small>» Do NOT enter invoice amount. » Enter full amount paid; do not deduct payments by this subcontractor to its own subcontractors</small>
PAYMENT DATE *	<input type="text" value="2/20/2023"/> <small>» Enter payment date if you made a payment for February 2023. » If multiple payments were made, enter the date of the first payment.</small>
PROMPT PAYMENT? *	<small>» Select a choice below if a payment amount is reported above. » "Prompt Pay" means payment within 30 days.</small> <input checked="" type="radio"/> Yes - the subcontractor was paid within 30 days of TEST-ASHLEY being paid by Washington State Office of Minority & Women's Business Enterprises. <input type="radio"/> No - the subcontractor was not paid within 30 days of TEST-ASHLEY being paid by Washington State Office of Minority & Women's Business Enterprises. <input type="radio"/> N/A - we cannot determine if the subcontractor was paid promptly.
PAYMENT DETAIL	Enter details of PAID check numbers (or ACH references) and amounts for February 2023. This information is optional but will speed up the confirmation process. Payment details are displayed to Test - Gina. <input type="text"/>
SUPPORTING DOCUMENTS	<input type="button" value="Attach File"/> Attached documents are not visible to Test - Gina.
COMMENTS	These comments are visible ONLY to the contract agent and prime contractor. They are not visible to Test - Gina. <input type="text"/>

- 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

Compliance Audit Information	
COMPLIANCE AUDIT TIME PERIOD	February 2023
COMPLIANCE AUDIT NUMBER	07633399-0002

Subcontractor Information	
BUSINESS NAME	Test - Gina
VENDOR NUMBER	20923471

Data Reported	
PAID AMOUNT FOR FEBRUARY 2023	\$15,000.00
PAYMENT DATE	2/20/2023
PROMPT PAYMENT?	Yes
PAYMENT DETAIL	
COMMENTS	

- Click **Save** button

The compliance audit response has been saved. Click a button to continue.

CONFIRMATION NUMBER	10130955
CONFIRMATION TYPE	Prime audit response of Contract K-070122 for February 2023 audit period.
USER	Nikoel Stevens
TIME STAMP	3/3/2023 1:48:24 PM PST

- Click **Return To Compliance Audit** button

Subcontractors - February 2023				
Subcontractor	Cert	Type	Inc. in Goal for Period	This Period
<div>1</div> Test - Gina (Info) Gina Test gkinge@omwbe.wa.gov P 360-111-1111	✓	Sub 100%	✓ MBE	\$15,000.00 View Edit Prompt: Yes
<div>2</div> Amal's FAKE LLC (Info) Amal Jouny amal.jouny@omwbe.wa.gov P 360-664-9756	✓	Sub 100%	✓ WBE	Not Reported Edit

Click subcontractor name to view payment history for this contract. Click contact person's name to send them a message.

- 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.

User Types

☐ Add User With Edit/Create Authority For ALL Departments

☐ Add User With Edit/Create Authority For ONE Department

Select department ▼

☐ Add User With View Authority For ALL Departments

☐ Add User With View Authority For ONE Department

Select department ▼

User's name will appear in the buyer/project manager field for contracts.

* required entry

User Information

EMAIL ADDRESS *

Add User

- 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**

* required entry

User Information	
USERNAME/EMAIL *	<input type="text"/>
NAME * (FIRST, MIDDLE INITIAL, LAST)	<input type="text"/> <input type="text"/> <input type="text"/>
TITLE	<input type="text"/>
PHONE *	<input type="text"/> <input type="text"/> Ext. <input type="text"/>
MOBILE	<input type="text"/> <input type="text"/>
FAX	<input type="text"/> <input type="text"/>
DIVISION	<input type="text"/>

- Enter **User Information** into required fields

Contact Info	Addresses	Preferences	Notifications	Departments & Workflow	User Role
Adjust your user role settings using the fields below. Click Save to confirm your changes.					
User Role Assignment					
<input type="radio"/> ADMINISTRATOR	Administrator Access				
<input checked="" type="radio"/> CONTRACT AGENT	Create/Edit Contracts, Create/Update Vendor Records, Create/Edit Outreach Campaigns & Events, View Certifications, Reporting				
<input type="radio"/> DOC ADMINISTRATOR	Create/Edit Contracts, Vendor & Outreach Records, Reporting & Creating Staff User Accounts				
<input type="radio"/> OUTREACH MANAGER	Full access to the outreach module				
<input type="radio"/> SECONDARY CONTRACT AGENT	Create/Edit Contracts, Create/Update Vendor Records, Create/Edit Outreach Campaigns & Events, View Certifications, Reporting, Delete/Close/Audit Contracts				
<input type="button" value="Save"/> <input type="button" value="Cancel / Return to List"/>					

- Select appropriate role for user

Default Addresses	
MAILING *	<input type="text" value="[Default] Main Address: 1110 Capitol Way S, Suite ..."/> ▼
BILLING *	<input type="text" value="[Default] Main Address: 1110 Capitol Way S, Suite ..."/> ▼
SHIPPING *	<input type="text" value="[Default] Main Address: 1110 Capitol Way S, Suite ..."/> ▼
PHYSICAL *	<input type="text" value="[Default] Main Address: 1110 Capitol Way S, Suite ..."/> ▼

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

Account Settings

PREFERRED NOTIFICATION METHOD ☒ Email
☐ Don't send any messages. All messages will be read when logged into the system.

TIME ZONE * US/Pacific

ASSIGNED DEPARTMENT -- Select a department --

Select a department ONLY if you want to limit the user to view a specific department's contracts. The user can be assigned to additional departments after creating the account.

☒ Notify new user with an email notice containing username and temporary password.
☐ Do NOT notify new user with an email notice containing username and temporary password.

Save User Cancel

- 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

Singh, Daljit Business Analyst	OMWBE Administrator User Role	7/13/2023	30000369-0135	Deactivate
Stevens, Nikoel	OMWBE Administrator User Role	7/14/2023	30000369-0147	Deactivate
Swenson, Ethan	View Only	6/6/2023	30000369-0167	Deactivate
Titus, Nakia	Contract Agent	1/17/2023	30000369-0123	Deactivate

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

Singh, Daljit Business Analyst	OMWBE Administrator User Role	7/13/2023	30000369-0135	Deactivate
Stevens, Nikoel	OMWBE Administrator User Role	7/14/2023	30000369-0147	Deactivate
Swenson, Ethan	View Only	6/6/2023	30000369-0167	Deactivate
Titus, Nakia	Contract Agent	1/17/2023	30000369-0123	Deactivate

* required entry

MESSAGE SUBJECT / REFERENCE *	<input type="text" value="Deactivate Staff User Account"/>
USER TO DEACTIVATE *	<input type="text"/>
REASON FOR DEACTIVATION *	<input type="text"/>
ADDITIONAL COMMENTS	<input type="text"/>
SCREENSHOT ATTACHED 	<input type="button" value="View File"/>
ATTACH FILE	<input type="button" value="Attach File"/>

- 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**

Message Sent to Customer Support

Your support request has been saved and queued for review. For reference, your ticket number is **2525799**.

- 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

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K-070122: TEST - Soybean Farm Construction
 Prime: **TEST-ASHLEY**
 7/1/2022 - 7/31/2023

- Go to desired Subcontractor to delete

Subcontractors								
	Subcontractor Name	Certified	Original/ Current	Type	Inc. in Goal	Compliance Audit	Final Pmnt	Actions
1	Test - Gina	No	30.00% 30.00%	Sub 100%	 MBE		No	View Edit More...
2	Amal's FAKE LLC	No	25.00% 25.00%	Sub 100%	 WBE		No	View Edit More...

- Select **More** link

Subcontractors								
	Subcontractor Name	Certified	Original/ Current	Type	Inc. in Goal	Compliance Audit	Final Print	Actions
1	Test - Gina	No (*)	30.00% 30.00%	Sub 100%			No	View Edit More...
2	Amal's FARE LLC	No (*)	25.00% 25.00%	Sub 100%			No	View Edit More... Award Letter Info Letter Payments View Profile Deactivate Delete Copy

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

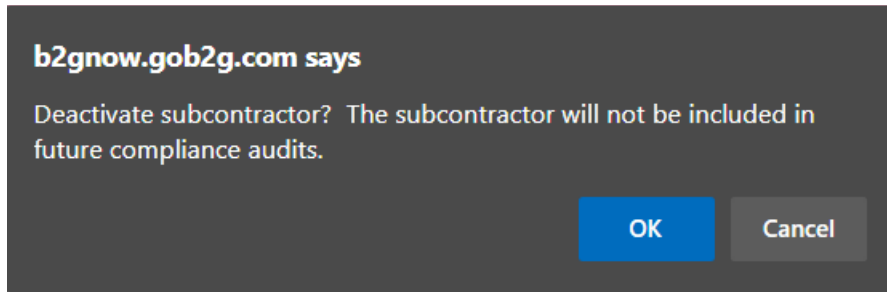
b2gnow.gob2g.com says

Delete this subcontractor? The subcontractor will be permanently removed from the contract and all related compliance audit records will be deleted.

If you need to deactivate this subcontractor, select the Deactivate option to turn off the monitoring for this subcontractor.

OK
Cancel

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

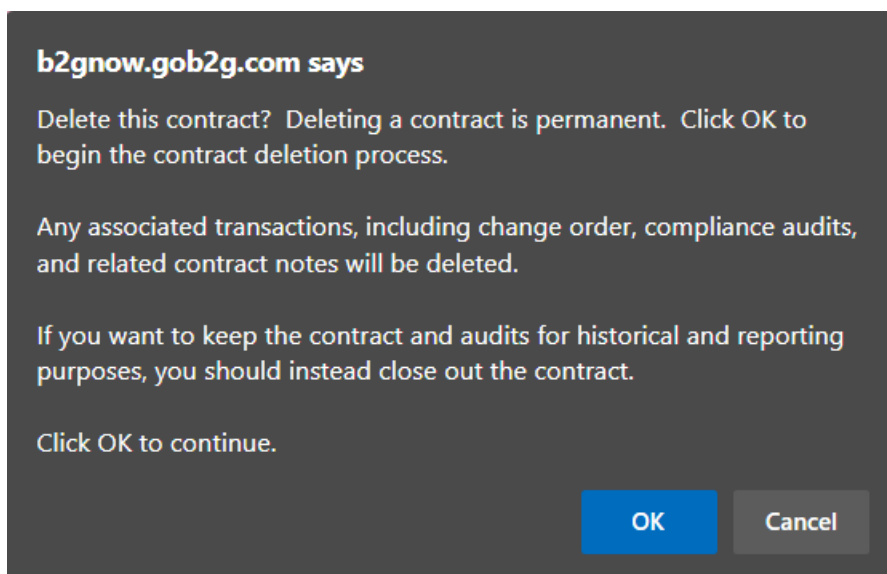


Delete Contract

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

Contract Status & Actions		
	Status	Actions
CONTRACT STATUS	Open	View Contract , Edit Contract , Close Out Change Secondary Status to: None selected ▾
CONTRACT AGENT	Assigned	Change Contract Agent to: Nikoel Stevens ▾
SECONDARY CONTRACT AGENT	Assigned	Change Secondary Contract Agent to: Douglas Mora ▾
COMPLIANCE MONITORING	On Demand (Monthly)	
SUBCONTRACTORS	2 subs	Manage Subcontractors , Create Task Order
TASK ORDERS		Amend Contract , Change Value
CONTRACT CHANGE ORDERS		Extend/Shorten Contract
CONTRACT EXTENSIONS/SHORTENINGS	Changed	Delete Contract , Vendor Archive , Copy Contract
OTHER FUNCTIONS		

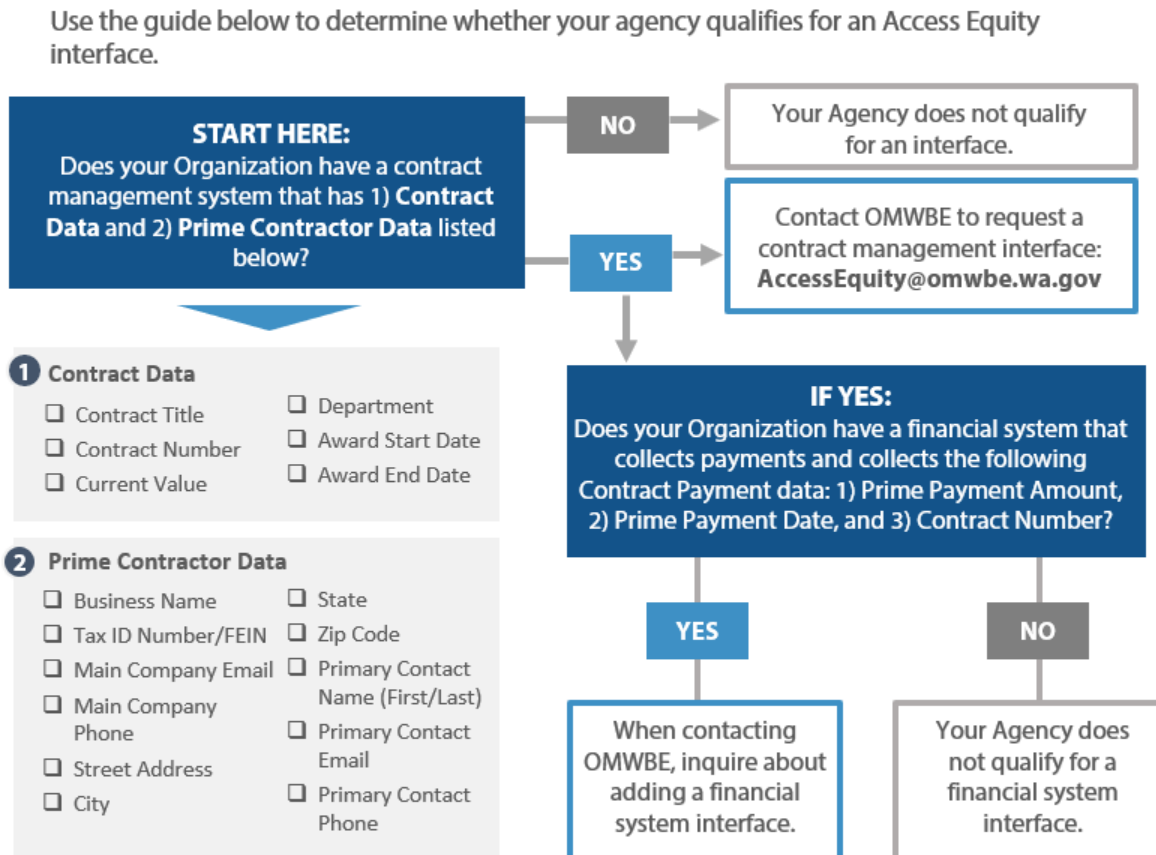
- Select **Delete Contract** link



Requesting an Interface

An interface is a data integration process that takes data from one source such as a database or 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.



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](#)