Supplier Registration Certification Manual

Presented by
Department of General Services, Procurement Division
Office of Small Business & DVBE Services

Revised 1/22/14
Instructions for Getting Started

Suppliers seeking certification are encouraged to gather the following documents:

- Applicant/Affiliate Federal Tax Returns for three most recent tax years
- Federal Employer Identification Number (FEIN) or Tax Identification Number (TIN)
  
  Do not enter dashes in FEIN or Social Security Number (TIN)
- Secretary of State Number (if applicable)
- Home address of Officers, Member/Manager and Partners
- Dunn & Bradstreet Number (if applicable)
- Contractors State License Board Number (if applicable)
- Keywords (words that identify your business activity)

You must register your business for eProcurement access (BidSync). It is recommended all business information be typed in capital letters. Registration consists of setting up a username and password. Write your user name and password down and keep this information in a secured location for future access.

To expedite your registration you may call BidSync at 1-800-990-9339 option 1. Otherwise within 24 hours you will receive confirmation by email that your user name and password have been accepted. This confirmation does not provide Access to your password and you will need your user name and password to log into eProcurement (BidSync) to complete your profile and application for certification. Set your spam filter to receive emails from bidsync.com and dgs.ca.gov

All DVBE and Limited Liability Company (LLC) applicants will be prompted to provide support documents to the Office of Small Business and DVBE Services (OSDS) at the end of the on-line submittal. OSDS will review the documents and render a certification decision.

All NVSA applicants will need to fill out a paper application, which can be found at the link below.
http://www.dgs.ca.gov/pd/Programs/OSDS/NVSA.aspx
Getting Started

Go to http://www.dgs.ca.gov/pd/Programs/eprocure.aspx then under Access eProcurement (eP) click on Register to create a new eP supplier profile (Bidsync)
Step 1: Your Information

Enter your business information. Enter your user name and password. When entering your Business ID Number DO NOT enter the dashes. Remember to keep your user name and password in a safe place. Click Next Step.
Step 2: Keywords
Select your Primary Industry from the drop box menu. Enter specific keywords in the boxes. You may add additional keywords by clicking on the Add More Keywords link. Select the appropriate Suggested Keywords that apply to your business. Under Where do you do business select California only. Under Notifications read where to update your notification preferences and de-select the box Include BidSync Links Plus bids (not recommended for Free Registration). Click Next Step.
Step 3: Classification Codes
Select the appropriate codes that apply to your business. Click Next Step.
Step 4: Complete BidSync Registration
Your information will be saved and your BidSync account is now activated. Click the My Account button to login to your account and complete your State of California Profile and SB/DVBE Application.
Once you receive the Confirmation email, or one business day has passed since you registered, go to http://www.dgs.ca.gov/pd/Programs/eprocure.aspx or click the link in the email to continue setting up your FREE California Supplier Profile. (BidSync has a ‘no refund policy’ for fee-paid service BidSync Links Plus.)

Note: Only your username is included in the confirmation email.
Go to http://www.dgs.ca.gov/pd/Programs/eprocure.aspx then under Access eProcurement (eP) click on Login to your registered eP profile. Enter the Username and Password you created.
The first time you log in you will need to accept **BidSync’s Terms and Conditions** to continue.
Account Home Page
Select My Account to begin the setup of your Company Profile.
Company Profile
Click the link Company Profile.
Notifications
Click on the box labeled Notifications.

Agency Types: Make sure only the box for State is marked for free bids.

Notification type & frequency: Verify the correct contact methods for each option.
Click Save. When finished click the My Account tab.
Account Profile Setup

Select “The State of California” link to begin the setup of your California Supplier Profile.
The State of California Supplier Profile

**Identification Number:** Select Federal Employer Identification Number or Social Security Number and enter numbers only **(no dashes)**. Click **Save**.
The State of California Supplier Profile

UNSPSC Classifications: click “Edit”. In the Search box type a word that describes your business and click Search. Mark the best fit descriptions. Scroll down to the bottom of the page and click Save.
The State of California Supplier Profile

The State of California Use Policy: Click “View”. Review the Use Policy, enter the Password and click Accept to continue.

PROFILE INFORMATION
- Federal Employer Identification Number: XXXXXXXXXXX [Edit]
- UNSPSC Classifications: [Edit]
- The State of California Use Policy: Not Accepted [View]
- Registration Status: Submit Registration

CERTIFICATIONS
Register your business with The State of California as:
- Small Business
- Disabled Veteran Business Enterprise
- Non-Profit Veteran Service Agency
- Non-Profit
The State of California Supplier Profile

Registration Status: The State of California Use Policy must indicate accepted to continue. If not click view to accept policy. If accepted, click “Submit Registration”
The State of California Supplier Profile

Registration Status: If the Registration Status indicates *Pending* call 1-800-990-9339 ext. 1 for assistance. Tell the operator your Registration is Pending. Otherwise, click “Register your business” link.

Your profile has been successfully submitted.

**PROFILE INFORMATION**
- Federal Employer Identification Number: XXXXXXXX
- UNSPSC Classifications: [Edit]
- The State of California Use Policy: Accepted [View]
- Registration Status: Registered

**CERTIFICATIONS**
Register your business with The State of California as:
- Small Business
- Disabled Veteran Business Enterprise
- Non-Profit Veteran Service Agency
- Non-Profit

Customer Support: vendorsupport@bidsync.com or 1-800-990-9339

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California Profile

Select the appropriate link next to Edit Options or in Active Certifications box to continue:
- New or Denied Applicants - Click on “Certify with Blank Application”
- Expired Applicants – Click on “Certify with Current Profile”
- Renewing Applicants – Click on “Renew Certification”
- Returning Applicants – Click on “Complete SB Application”
Certification Types and Business Types

Determine the desired application type then select the appropriate box or boxes (where available). Select **Next**.
Eligibility Questions

Answer all questions then click **Next**.

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**Eligibility Questions**

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

### SMALL BUSINESS (SB) ELIGIBILITY QUESTIONS

1. Is the applicant firm independently owned and operated?  
   Yes ☐ No ☐

2. Is the applicant firm dominant in its field of operation?  
   Yes ☐ No ☐

3. Is the applicant firm’s principal office located in California?  
   Yes ☐ No ☐

4. Are the applicant firm’s owners (or officers in the case of a corporation) domiciled in California?  
   Yes ☐ No ☐

5. Together with the applicant’s affiliates (if any), does the applicant firm have 100 or fewer employees?  
   Yes ☐ No ☐

Please answer each of the following questions to see if you meet the minimum disabled veteran business enterprise (DVBE) certification eligibility requirements:

### DISABLED VETERAN BUSINESS ENTERPRISE (DVBE) ELIGIBILITY QUESTIONS

1. Is the applicant firm’s qualifying disabled veteran(s)...  
   A veteran of the U.S. military, naval, or air service?  
   Yes ☐ No ☐

   Has a "service-connected" disability rating of at least 10%?  
   Yes ☐ No ☐

   Domiciled in California?  
   Yes ☐ No ☐

2. Is the applicant business at least 51% owned by one or more disabled veterans?  
   Yes ☐ No ☐

3. Is the applicant business managed and controlled by one or more disabled veterans?  
   Yes ☐ No ☐

4. Is the applicant’s home office located in the U.S.?  
   Yes ☐ No ☐

5. Is the applicant’s home office a branch or subsidiary of a foreign corporation, foreign firm, or other foreign based business?  
   Yes ☐ No ☐
Participation Authorization and Compliance Agreement

In order to continue accept the terms and click **Next**.
Registration

Select Certification Type. Enter Registration Data, Contact Information, Mailing Address, and Principal Address. Click **Next**.
Business

Owners

Click **Add Owner** button to add Ownership Information. Select appropriate Titles when prompted. Click Save and repeat to add additional owners, officers or members when necessary.

Click **Next** when finished.
Affiliates

When required, click **Add Affiliate** button to enter Affiliate Information. Click Save. Repeat to add additional affiliates. Click **Next**.
Taxes

Enter your **Gross Annual Receipts** for the years requested. The Update option may not be required. Click **Next**.
Other: Enter Various Data and Service Areas

UNSPSC: Select Classifications and search by keywords to identify UNSPSC codes. In the search results box, select the applicable UNSPSC code and click the Add Classification button. Repeat for each key word.

Key Words: Enter words which best describe the service or product your firm provides.

Commercially Useful Function: Answer Commercially Useful Function questions.

When finished click Submit.
Enter your Password. Click **Submit**.
After the application has been submitted, you will receive a message reflecting the status of your certification. If additional documents are required prior to your approval you may upload them to your application or mail them to:

The Office of Small Business and DVBE Services
707 3rd Street, 1st Floor, Room 400
West Sacramento, Ca 95605

Click **Close** to return to your California Profile.
California Profile

California Profile - Review profile screen. If your firm’s status is Approved, under Edit Options, select “Amend Application” to make changes if needed. Select the Logout button to exit your eProcurement Account.

Active Certifications - View application Status (see next slide for Status definitions).
What Does My Application Status Mean?

- **Approved**: Your online application has been accepted and approved. You should receive an approval email from BidSync. Mail in the supporting documents requested under the “Annual Submission Requirement” section of the Approval email.

- **Full Doc**: Application requires additional support documents to be submitted and reviewed prior to making a certification decision. Be sure to include your Supplier Number when faxing or mailing documents.

- **Waiting for Agency**: Supporting documents have been received and the application is waiting for a Certification Officer to review it.

- **Pending**: Your SB/DVBE application has not been submitted. You must return to the application by selecting “Complete Application” on the California Supplier Profile page.

- **Deficiency**: A Certification Officer has reviewed the file and determined additional supporting documents are required to make an accurate certification determination.

- **Denied**: Based on your responses or information in the application your firm does not qualify for the State of CA SB/DVBE Program.

Questions? Call the **Office of Small Business & DVBE Services** at (916) 375-4940, or email us at **OSDSHelp@dgs.ca.gov**