



COMBINED SBR, MBE & VSBE LIAISON TRAINING

February 9, 2023

Governor's Office of Small, Minority & Women Business Affairs Staff



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Governor's Office of Small, Minority & Women Business Affairs



AGENDA

1. General information for all programs
2. ANSWERS Overview presented by DoIT
3. SBR Program Training
4. Lunch Break from 12pm to 12:45pm
5. MBE Program Training
6. VSBE Program Training

STAYING ALIGNED WITH THE GOVERNOR'S MISSION

Governor Moore's speech at the January 25th BPW meeting was very eye opening and we believe he set the standard for increased transparency, inclusion, and performance statewide... We hope all of you have heard it but in case you did not, click the image to listen.



The background features several overlapping, flowing waves of color. The top wave is a vibrant red that transitions into a bright yellow. Below it, another wave is primarily yellow with a red gradient. The bottom section shows more complex, layered waves in shades of red and yellow, creating a sense of depth and movement. The overall effect is dynamic and energetic.

GENERAL LIAISON INFORMATION

WHO FROM YOUR AGENCY SHOULD BE ADDED TO OUR MAILING LIST?

- Liaisons
- Report Preparers
- Anyone in your agency who would like to stay informed regarding any SBR, MBE and VSBE Program updates or trainings
- Also, inform us when you would like to be removed from our mailing list

As always, please remember to inform your designated compliance managers whenever your agency has a new liaison or report preparer. You will need to provide us with their contact information and which programs they will be the new liaison for.

LIAISON DUTIES

- Coordinating agency outreach efforts to the communities of each program.
- Overall program compliance
- Assisting in resolution of contracting issues
- Keeping track of programs data throughout the fiscal year and submission of reports:
 - Quarterly Reports (SBR & MBE Only)
 - Annual Reports
 - Procurement Forecast
 - Strategic Plans (SBR & MBE Only)
 - Surveys (If required for the FY)

Comar References:

SBR: 21.11.01.06

MBE: 21.11.03.05

VSBE: 21.11.14.05

DEADLINES

- Reporting deadlines can be found on page 1 of the MBE Reporting Manual within the MBE reporting toolkit.
- Be sure to download the newest version of the manual to have up to date reporting deadlines.

REPORTING DEADLINES

Due Date	Report	Submission	Authority	Frequency
As Issued	MBE Waiver Determinations	compliance.gosba@maryland.gov	COMAR 21.11.03.11	As Issued
10/31	SBR 1st Quarter Report (July 1 – Sept 30 data)	sbrreports.gosba@maryland.gov	COMAR 21.13.01.03A; Advisory 2009-03	Quarterly
10/31	MBE 1 st Quarter Report of cumulative data (July 1 – Sept 30 data) (monthly submissions of cumulative data are optional)	mbereports.gosba@maryland.gov	COMAR 21.11.03.17	Quarterly
01/31	SBR 2nd Quarter Report (Jul 1 – Dec 31 data)	sbrreports.gosba@maryland.gov	COMAR 21.13.01.03A; Advisory 2009-03	Quarterly
01/31	MBE 2 nd Quarter Report of cumulative data (July 1 – Dec 31 data)(monthly submissions of cumulative data are optional)	mbereports.gosba@maryland.gov	COMAR 21.11.03.17	Quarterly
04/30	SBR 3rd Quarter Report (Jul 1 – Mar 31 data)	sbrreports.gosba@maryland.gov	COMAR 21.13.01.03A; Advisory 2009-03	Quarterly
04/30	MBE 3 rd Quarter Report of cumulative data (July 1 – Mar 31 data) (monthly submissions of cumulative data are optional)	mbereports.gosba@maryland.gov	COMAR 21.11.03.17	Quarterly
06/30	FY23 Procurement Forecast Template	compliance.gosba@maryland.gov	COMAR 21.11.03.17	Annual
Submit Annual Report instead on 09/30	No SBR 4 th Quarter Report is due, instead turn in the Annual Report no later than 9/30	sbrreports.gosba@maryland.gov	COMAR 21.13.01.03A; Advisory 2009-03	Quarterly
Submit Annual Report instead on 09/30	No MBE 4 th Quarter Report is due, instead turn in the Annual Report no later than 9/30	mbereports.gosba@maryland.gov	COMAR 21.11.03.17	Quarterly
07/31	MBE Waivers Report (Annual)	Sent to BPW with copy to compliance.gosba@maryland.gov	COMAR 21.11.03.17 (3)	Annual
06/30	FY23 SBR & MBE Consolidated Strategic Plan	compliance.gosba@maryland.gov	COMAR 21.11.03.08; COMAR 21.13.01.03B(3); COMAR 21.11.03.17; SF&P 14-505(a) Advisory 2005-1	Annual
09/30	MBE Annual Report cumulative data July 1 – June 30	mbereports.gosba@maryland.gov	COMAR 21.11.03.17	Annual
09/30	SBR Annual Report cumulative data July 1 – June 30	sbrreports.gosba@maryland.gov	SF&P 14-505; COMAR 21.13.01.03B	Annual
10/1	Veteran-Owned Small Business (VSBE)	vsbereports.gosba@maryland.gov	SF&P 14-604; COMAR 21.13.01.15A; COMAR 21.11.14.04 D	Annual
Due within 60 days of the enactment of the Budget	Preferred Provider next FY Forecast	DUE TO DGS NOT GOSBA	SFP 14-110	Annual
09/30	Preferred Provider Annual Report	DUE TO DGS NOT GOSBA	SFP 14-110	Annual

REPORTING MAILBOXES

MBE Mailbox

mbereports.gosba@maryland.gov

- Quarterly MBE Reports
- Annual MBE Report

SBR Mailbox

sbrreports.gosba@maryland.gov

- Quarterly SBR Reports
- Annual SBR Report

VSBE Mailbox

vsbereports.gosba@maryland.gov

- Annual VSBE Report
- VSBE Program Outreach Report

Compliance Mailbox

compliance.gosba@maryland.gov

- FY Procurement Forecast Template
- FY SBR & MBE Consolidated Strategic Plan
- MBE Waiver Determinations (As Issued)
- MBE Annual Waivers Report (Sent to BPW with CC to GOSBA Compliance Mailbox)

NAVIGATING REPORTING TOOLKITS

- Visit our websites homepage
 - goMDsmallbiz.Maryland.gov
- Bottom left corner select which programs toolkit you would like to view.
- Toolkits include the following:
 - Reporting Templates
 - Be sure to download up to date reporting templates.
 - Training/Program Specific Resources
 - Compliance Bulletins

Enter search term

Home MBE PROGRAM SBR PROGRAM VSBE Program RESOURCES PROCUREMENT FORECAST

GOVERNOR'S OFFICE OF Small, Minority & Women Business Affairs

GOVERNOR'S COORDINATING OFFICES HOME

Quick Links

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Outreach

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SBR PROGRAM REPORTING TOOLKIT

MBE PROGRAM REPORTING TOOLKIT

VSBE PROGRAM REPORTING TOOLKIT

01 FEB | Maryland GOVERNOR'S OFFICE OF SMALL, MINORITY & WOMEN BUSINESS AFFAIRS | 01 MAR

Black History Month 2023

Know The Past, Shape The Future

23 Maryland Civil Rights Heroes

Attention SBR & VSBE Vendors

If you are experiencing problems with certification or recertification in eMMA, call us for assistance at 410-697-9600.

TOP WEBSITE PICKS

- NEW - 2022 Expanding Opportunities Magazine
- eMaryland Marketplace Advantage (eMMA)
- Maryland Financial Incentives for Businesses
- Maryland Business Express
- Maryland Entrepreneur Hub
- SBR Liaisons
- MBE Liaisons
- VSBE Liaisons
- MBE Rights & Responsibilities
- FY2021 Customer Service Annual Report

MINING PUBLIC DATA

eMaryland Marketplace Advantage (eMMA)

- Video
- Slide Deck

Procurement Forecast

- Video
- Slide Deck

Board of Public Works

- Video
- Slide Deck



REPORTING TOOLS FOR ALL PROGRAMS

What is Scrubbing?

- Data cleansing, also known as data cleaning or scrubbing, identifies and fixes errors, duplicates, and irrelevant data from a raw dataset.
- Part of the data preparation process, data cleansing allows for accurate, defensible data that generates reliable visualizations, models, and business decisions.

SCRUBBING DATA

Solve Data Errors

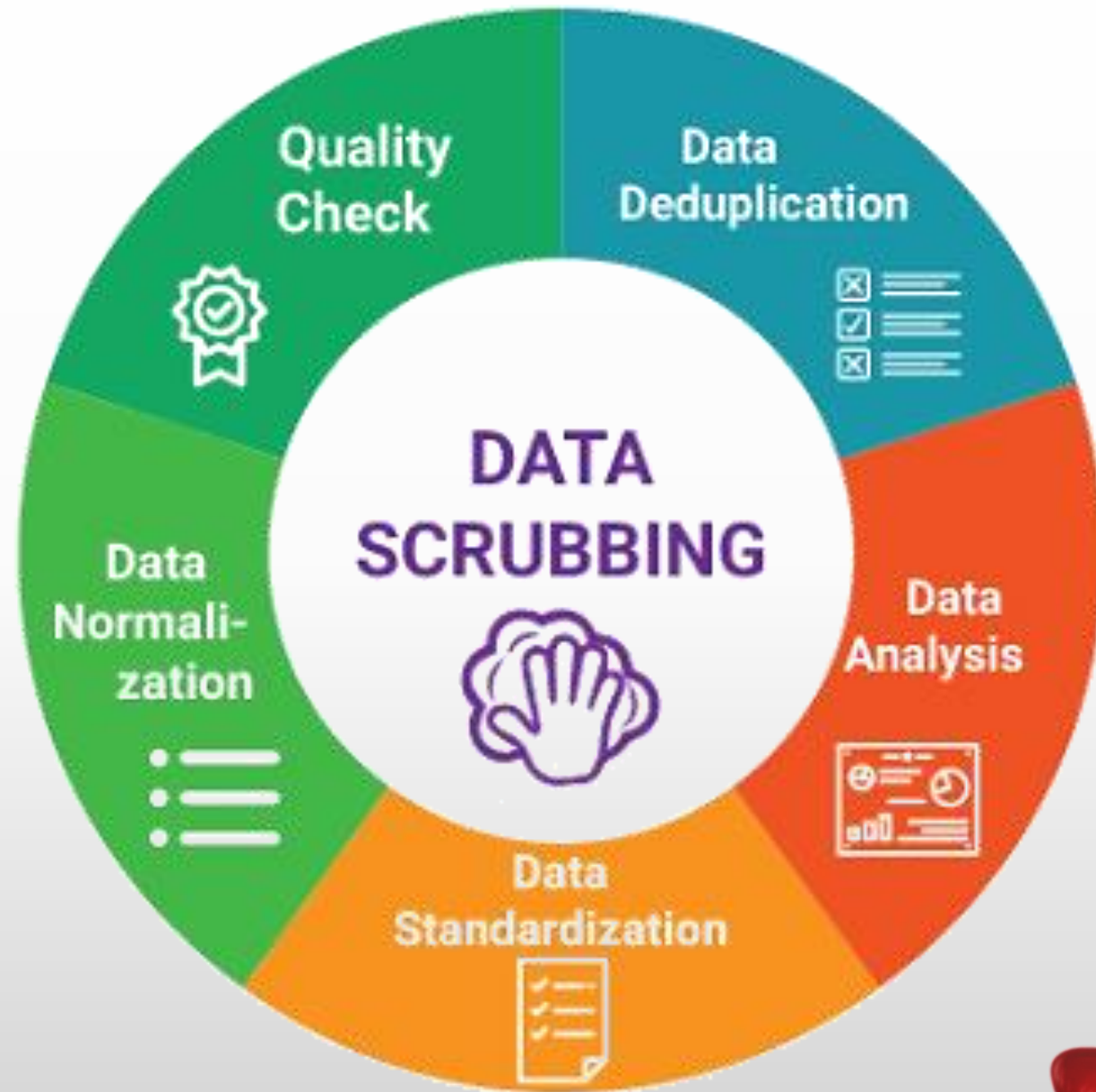
Ensure Data is Complete

Ensure Data is Clean

Ensure Data is Consistent with Requirements

Ensure Data is in the Proper Format

Ensure Data is Accurate



WHAT SHOULD BE SCRUBBED FROM YOUR REPORT?

- Exclusions
- Contracts that were not awarded within the Fiscal Year being reported
- Contracts that were cancelled
- Preferred Providers



GAD LIST

- Utilize the GAD list to find what you will need to exclude from your reports.
- Last page references specific SBR and MBE Program guidelines regarding the GAD list.

Controller Objects Commodity Exclusion List
Also known as "GAD List"

Compt. Object D10 Profile	Title	STARS Conv. Source / Object	Definition
0102	ADDITIONAL ASSISTANCE	A02	Salaries and wages paid to temporary and emergency employees.
1515	ADMINISTRATIVE AND GENERAL EXPENSES		Administrative and General Expenses - These are assumed to be business expenses not subject to 1099 reporting. They would be expenditures for the general administration of whatever activity (health, public safety, recreation, etc.) they are being performed for. They should only be reported here if they cannot be specifically identified with another object.
0831	ADMINISTRATIVE HEARINGS	H31	To record any fees paid to the Office of Administrative Hearings.
1202	AID TO POLITICAL SUBDIVISIONS	T04	Subsidies, gratuities and other aid paid by a state agency to a political subdivision.
1532	AMORITIZATION EXPENSE		
1305	ASSOCIATION DUES	W05	Fees paid for membership to various organizations.
			To be used by those agencies (such as Colleges and Universities) where the basis of

*** NOTES FROM SBR ANNUAL REPORT INSTRUCTIONS:**

All purchases, including credit cards, made from control agency statewide contracts are reportable unless they are specifically listed on the GAD exclusions list.

Example #1: Purchases made from the three current DGS statewide office supply contracts (Rudolph's, Staples, and AJ Stationers) are SBR-reportable because office supplies are not specifically excluded on the GAD list. Therefore, these transactions should be included in your report totals.

Example #2: The DGS statewide contract with Mansfield Oil for fuel oil; fuel oil is listed on the GAD document as a non-reportable expense and therefore should not be included in your report totals

*** EXCERPT FROM FY2015 ANNUAL MBE PROCUREMENT REPORT GUIDELINES PAGES 3&4:**

DGS Contracts: Regarding AWARDS, *agency-specific* commodities and maintenance contracts awarded by or through the Department of General Services (DGS) should be included on the *agency's* annual report on Forms 1 and 2. Non-delegated DGS contracts (i.e., Statewide, Capital Construction, etc.) should be excluded from Forms 1 and 2, as DGS will report these awards.

Regarding EXPENDITURES *all MBE expenditures from DGS statewide contracts and delegated contracts* should be included on the using agency's Form 3 Payments/Subcontractor Utilization Database.

DoIT/DBM Master Contracts: Certain Department of Budget and Management (DBM) and Department of Information Technology (DoIT) master contracts have been delegated to the using agency for purposes of MBE compliance and reporting. All task order awards made from these delegated contracts should be reported on Forms 1 and 2 by the using agency. Payments made to task order contractors (MBE prime and MBE subcontractor) during FY 2015 are to be reported on Form 3. For non-delegated DoIT/DBM Statewide contracts, agencies should report only expenditures to MBEs in the Form 3 Payments/Subcontractor Utilization Database. (See the [DBM website](#) and the DOIT Master

GAD LIST QUICK SEARCH

- Press CTRL + F buttons simultaneously
- Enter keyword to verify if the commodity should be excluded.

Code	Description	Code	Description
1304	SUBSCRIPTIONS	W04	Subscriptions for magazines, newspapers and periodicals.
1542	TAX REFUNDS - IRS NON REPORTABLE		
1541	TAX REFUNDS - IRS REPORTABLE		
1298	TAXABLE GRANTS, CONTRIBUTIONS 1099G	T98	Any grants, subsidies, or contributions made to individuals, sole proprietors, or partnerships which are considered as taxable income for such entities.
0164	TEACHERS' PENSION SYSTEM	A64	To record contributions on state employees enrolled in the Teachers' Pension System.
1212	TEACHERS' PENSION SYSTEM GRANTS	T13	To record contributions on non-state employees enrolled in the Teachers' Pension System.
0163	TEACHERS' RETIREMENT SYSTEM	A63	To record contributions on state employees enrolled in the Teachers' Retirement System.
1211	TEACHERS' RETIREMENT SYSTEM GRANTS	T12	To record contributions on non-state employees enrolled in the Teachers' Retirement System.
0303	TELECOMMUNICATIONS	C03	All telecommunications equipment and services other than those procured from a common carrier and excluding equipment purchased under Object Class 10 and 11.
0302	TELEPHONE	C02	Telephone lines and equipment including private lines procured from a common carrier. Designated on telephone bills as a "Local Service." Also includes all toll calls and such telegrams are as filed by telephone and included in telephone bills. Designated on telephone bills as "Calls and Telegrams," charges for local area calls over and above any allowance of free calls, and designated on telephone bills as "Additional Message Units," and charges for moves and installation designated on telephone bills as "Other Charges and Credits." (that portion of "Other charges and Credits" related to a partial month's service for lines and equipment is to be included) "under telephone." Does not include any payments to the Department of Budget and Management, Division of Telecommunications or equipment financed through capital leases. (See subobject codes (C05 and C22).
0181	TUITION WAIVERS	A81	To record the cost for any tuition waivers granted to institutional employees or their dependents. This subobject is to be used by Public Institutions of Higher Education only.
0189	TURNOVER EXPECTANCY	A89	Percentage that reflects the unconstrained resignations/recruitment behavior.
1538	UNDISTRIBUTED DISBURSEMENTS		
1599	UNDISTRIBUTED OBJECT CODE (DEFAULT)		
0174	UNEMPLOYMENT COMPENSATION	A74	To record biweekly premiums charged to state agencies and held in trust by the Department of Budget & Management (DBM). DBM on behalf of state agencies will reimburse the Department of Labor, Licensing, and Regulation (DLLR) for claims paid to former employees.
0214	UNEMPLOYMENT COMPENSATION	B14	To record biweekly premiums charged to state agencies and held in trust by the (DBM) Office of Human Resources. The DBM on behalf of state agencies will reimburse the DLLR for claims paid to former contractual employees.

COLOR BLOCKING

Identifying the information, you are using to populate your reports OR excluding from reports is beneficial to both your agency and our office.

TIPS:

- A quick way to identify the information you used in your reports is by utilizing color blocking.
- Choose a color palette and stick with it throughout your reports.
- Consider adding a summary page with a key

EXAMPLE:

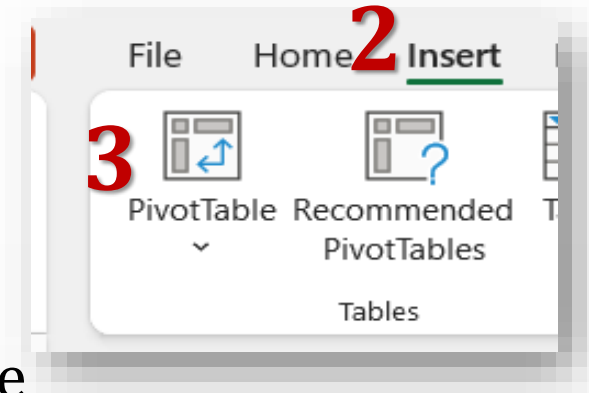
6	D26	Department of Scrubbing	S33
7	D26	Department of Scrubbing	S33
8	D26	Department of Scrubbing	S33
9	D26	Department of Scrubbing	S33
10	D26	Department of Scrubbing	S33
11			
12	EXCLUSIONS FOR AWARDS INCLUSION FOR PAYMENTS		
13	D26	Department of Scrubbing	S33
14	D26	Department of Scrubbing	S33
15	D26	Department of Scrubbing	S33
16	D26	Department of Scrubbing	S33
17	D26	Department of Scrubbing	S33
18	D26	Department of Scrubbing	S33
19	D26	Department of Scrubbing	S33
20	D26	Department of Scrubbing	S33
21	D26	Department of Scrubbing	S33
22			
23			
24			
25	EXCLUSIONS		
26	D26	Department of Scrubbing	S33
27	D26	Department of Scrubbing	S33
28	D26	Department of Scrubbing	S33
29	D26	Department of Scrubbing	S33

COLOR BLOCKING

PIVOT TABLES

PIVOT TABLES CAN QUICKLY SUMMARIZE LARGE AMOUNTS OF DATA

1. Click a cell where you want to place a pivot table
2. Click INSERT on the ribbon
3. Click Pivot Table in the Tables group
4. Select the data you want to include from your table



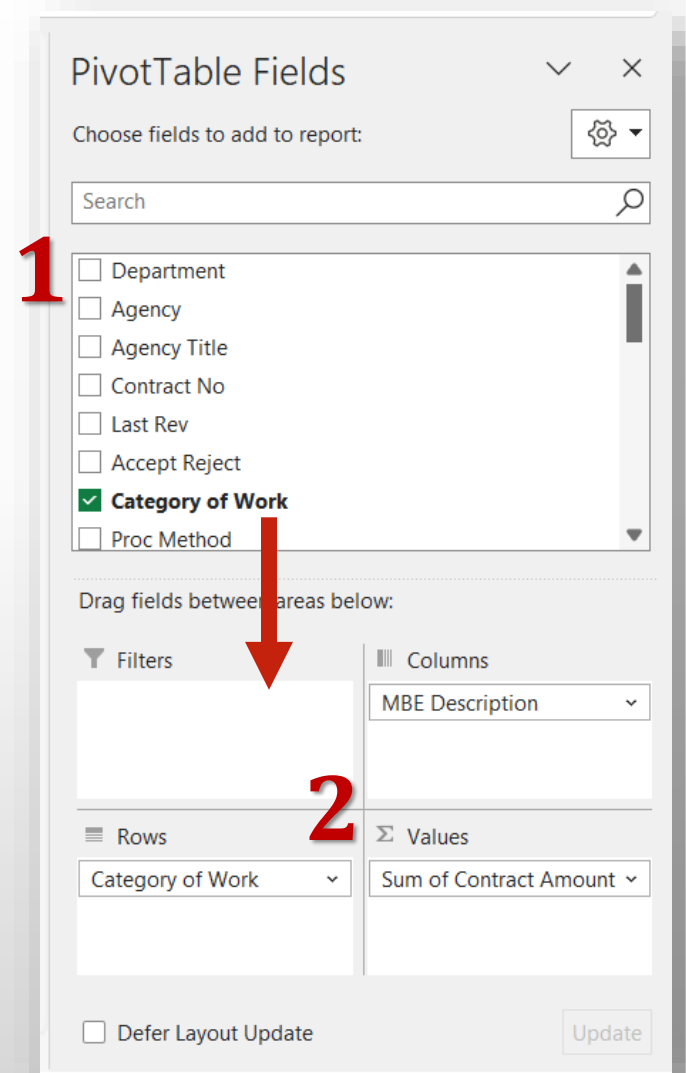
A screenshot of an Excel spreadsheet. A red number '4' is placed to the left of the spreadsheet. The spreadsheet has a table with the following data:

	A	B	C	D	E	F
1	Dept	MBE Cod	MBE Description	Vendor Nc	Vendor Name	SBR Ven
2	S33			****842146	SIGN LANGUAGE LLC	
3	S33			****189892	PRODUCTION TEAM	
4	S33			****508591	321 SUPPORT	
5	S33			****586710	LANGUAGE PROS	
6	S33			****982511	QUICK REPAIRS LLC	
7	S33			****143563	MOBILE SOFTWARE INC	

PIVOT TABLES

PIVOT TABLES CAN QUICKLY SUMMARIZE LARGE AMOUNTS OF DATA

1. Select fields to include by clicking and dragging fields to the areas you prefer
2. TIP: If you don't know which field will give you what you need, you can drag it between the four areas to choose the best option



PIVOT TABLES

CUSTOMIZE YOUR PIVOT TABLE

1. You can utilize filters if need to change the format of your data or to hide certain data by clicking the arrow beside a field & clicking Field Settings
2. Next choose your options to filter or format data and click OK

The image shows two screenshots from Microsoft Excel. The left screenshot is the 'PivotTable Fields' task pane. It lists fields: 'Category of Work' (checked), 'Proc Method', 'Contract Amount' (checked), 'Doc Status', 'Multi Vendor', 'Vendor Number', and 'Vendor Name'. Below the list, there are sections for 'Filters', 'Rows', and 'Columns'. The 'Rows' section shows 'Category of Work' and the 'Columns' section shows 'Count of Contract Amou...'. A red arrow points to the dropdown arrow next to 'Count of Contract Amou...', which is labeled with a red '1'. A context menu is open over this dropdown, listing options: 'Move Up', 'Move Down', 'Move to Beginning', 'Move to End', 'Move to Report Filter', 'Move to Row Labels', 'Move to Column Labels', 'Move to Values', 'Remove Field', and 'Value Field Settings...'. The right screenshot is the 'Value Field Settings' dialog box. It shows 'Source Name: Contract Amount' and 'Custom Name: Sum of Contract Amount'. Under 'Summarize Values By', there are two tabs: 'Summarize Values By' and 'Show Values As'. The 'Summarize value field by' section has a dropdown menu with options: 'Sum', 'Count', 'Average', 'Max', 'Min', and 'Product'. The 'Sum' option is selected. A red arrow points to the 'Sum' option, which is labeled with a red '2'. At the bottom of the dialog, there are buttons for 'Number Format', 'OK', and 'Cancel'.

PIVOT TABLES

CUSTOMIZE YOUR PIVOT TABLE (cont.)

1. You can also use in table filters to show different data.
2. Click the filter next to the data label.
3. Make your selection
4. Click OK and the data will update.
5. **TIP:** If you must make changes within your dataset after making a pivot table, just make your changes, then right click the table and click Refresh.

The screenshot displays an Excel PivotTable with the following data:

Column Labels	Hispanic	(blank)
	\$ 4,591.56	
	\$ 3,434.30	
	\$ 3,541.00	
	\$ 6,110.18	
	\$ 6,619.75	
	\$ 4,381.00	
	\$ 4,950.00	
	\$ 9,404.68	
	\$ 4,640.00	
	\$ 9,404.68	\$ 38,267.79

The task pane on the left shows the 'Label Filters' section with the following options:

- (Select All)
- African American
- Hispanic
- (blank)

The right-click context menu on the PivotTable shows the 'Refresh' option circled in red.



PIVOT TABLE LIVE DEMONSTRATION

ACCEPTABLE BACKUP DATA FORMATS

- Excel format is the only acceptable backup format.
- We do not accept:
 - Screenshots
 - Bank Statements
 - PDFs
 - If you have no other option other than to provide a PDF you are still required to submit a summarized version of the data in Excel format.
 - For example, A30USB11 credit card reports are only available in PDF. You would then submit the PDF as well as the summarized excel data.

NAMING CONVENTIONS & DOCUMENT SETUP

- When saving files be sure to include:
 - Report name
 - Agency/Office Name
 - Fiscal Year being reported for
- When naming backup data tabs within excel include:
 - Whether the data is raw or scrubbed
 - What report is included in the tab



CONSOLIDATING DATA

- When turning in backup data be sure to consolidate the data into one excel sheet. If your agency wants to include internal data that may not have been captured within ANSWERS. Consolidate that data with the correct PCHL report and make a clear distinction that it is internal data being included.
 - For example, (MBE or VSBE) your agency had a few contracts that were not captured you would include that data in your Contract Awards backup data report or PCHL710. Make a clear distinction that it is internal data being included.
 - For example, (SBR) your agency had a few payments that were not captured you would include that data in your SBR Payment backup report or 067 report. Making a clear distinction that it is internal data being included.
- When submitting backup data be sure to consolidate all backup data in one master excel sheet.

Summary of MBE report

PCHL709

PCHL710 RAW

PCHL710 SCRUBBED

PCHL711

PCHL713

PCHL717 RAW

PCHL717 SCRUBBED

CONSOLIDATING DATA

- When pulling Credit Card reports be sure to select 'CPC' to make sure you are exporting 1 consolidated Credit Card report not for each month

PCH721 - R*Stars Voucher Detail

Agency:

- DBM / Restricted Appropriations (Y50)
- Department of Aging (D26)
- Department of Agriculture (L00)
- Department of Budget and Management (F10)
- Department of Business and Economic Development (T00)
- Department of Disabilities (D12)

Begin Date:

End Date: (Calculated from Begin Date.)

Date Presets: (Calculated from today.)

* Report Data is updated weekly and current as of 2/4/2023.

Optional Selections:

Amount Threshold:

CPC Only:

DETAIL VS. SUMMARIZED DATA

- Detail data provides the necessary data required for us to confirm whether it should be included in the FY being reported
 - Dates (Award date, payment date, change order date)
 - Transaction line detail (Amount vs. Reportable Amount)
 - MBE, SBR, VSBE Certification flags
 - Commodity Name/ID
 - Voucher Numbers
 - Agency Name

Department	Agency	Agency Title	Contract No	Last Rev	Accept Reje	Category of Wor	Proc Methc	Contract Amour	Doc Statu	Multi Vend	Vendor Numbe	Vendor Name	Fiscal Effective Dat
Department of Scrubbing	S33	OFFICE OF SCRUBBING	S33PB3300080		0 A	AE	PPR	\$4,591.56	POST	N	****637810	ENGINEERING EXPERTS CORP	
Department of Scrubbing	S33	OFFICE OF SCRUBBING	S33PB3300079		0 A	C	SP	\$43,160.00	POST	N	****637809	HANDY CONSTRUCTION LLC	
Department of Scrubbing	S33	OFFICE OF SCRUBBING	S33PB3300081		0 A	CRS	PPR	\$3,434.30	POST	N	****832811	TERRAIN BUILDERS	
Department of Scrubbing	S33	OFFICE OF SCRUBBING	S33PB3300092		0 A	CSE	SP	\$3,541.00	POST	N	****955822	RECREATIONAL SUPPLIES	
Department of Scrubbing	S33	OFFICE OF SCRUBBING	S33PB3300077		0 A	HCF	SP	\$6,110.18	PVCH	N	****637807	ENVIROMENTAL INITIATIVES, INC	
Department of Scrubbing	S33	OFFICE OF SCRUBBING	S33PB3300082		0 A	ITE	PPR	\$3,434.30	POST	N	****832812	TECHNOLOGY HERO INC	
Department of Scrubbing	S33	OFFICE OF SCRUBBING	S33PB3300083		0 A	ITE	PPR	\$3,185.45	CLOS	N	****832812	TECHNOLOGY HERO INC	
Department of Scrubbing	S33	OFFICE OF SCRUBBING	S33PB3300086		3 A	ITS	SP	\$4,381.00	CLOS	N	****832816	SOFTWARE & LOGO KINGS LLC	1/27/2022
Department of Scrubbing	S33	OFFICE OF SCRUBBING	S33PB3300078		2 A	ITW	SP	\$4,950.00	CLOS	N	****637808	EZ TECHNOLOGY CORP	2/17/2022
Department of Scrubbing	S33	OFFICE OF SCRUBBING	S33PB3300093		0 A	M	SP	\$3,404.68	POST	N	****637823	360 MAINTENANCE	
Department of Scrubbing	S33	OFFICE OF SCRUBBING	S33PB3300094		0 A	M	SP	\$6,000.00	POST	N	****637823	360 MAINTENANCE	6/29/2022
Department of Scrubbing	S33	OFFICE OF SCRUBBING	S33PB3300084		0 A	S	SP	\$4,640.00	POST	N	****832814	EXPRESS SERVICES	2/17/2022
Department of Scrubbing	S33	OFFICE OF SCRUBBING	S33PB3300085		0 A	S	SP	\$50,000.00	POST	N	****832815	WASTE MANAGEMENT	5/3/2022

DETAIL VS. SUMMARIZED DATA

- Summarized data provides a summary of each reports totals
- For example:
 - How many transactions included MBE, SBR, or VSBE totals
 - Category of Work
- Summarized reports alone are not acceptable backup documentation

710 - DATA SUMMARY				
CATEGORY OF WORK	TOTAL COUNT	AMOUNT	MBE	MBE DESCRIPTION
AE	1	\$4,591.56	NO	
C	1	\$43,160.00	NO	
CRS	1	\$3,434.30	NO	
CSE	1	\$3,541.00	NO	
HCF	1	\$6,110.18	NO	
ITE/ITW	3	\$11,569.75	NO	
ITS	1	\$4,381.00	NO	
M	2	\$9,404.68	YES	HISPANIC
S	2	\$54,640.00	YES	AFRICAN AMERICAN



ANSWERS OVERVIEW

Presented by: Mike McKenna -DoIT

FMIS – ANSWERS OUTLINE

MBE/SBR/VET REPORTING

- ANSWERS MBE/SBR/VET Reports
 - ([Home - A*N*S*W*E*R*S \(md.gov\)](#))
 - MBE/VET Procurement Reports
 - 709 ([Issue Date: January 18, 2001 \(sharepoint.com\)](#))
 - COs w/ net amount increase – outside reporting period
 - 710 ([Issue Date: January 18, 2001 \(sharepoint.com\)](#))
 - 711 ([Issue Date: January 18, 2001 \(sharepoint.com\)](#))
 - 712 ([Issue Date: January 18, 2001 \(sharepoint.com\)](#))
 - 713 ([Issue Date: January 18, 2001 \(sharepoint.com\)](#))
 - 710 is detail driver for 711-713 summaries
 - 722 ([Issue Date: January 18, 2001 \(sharepoint.com\)](#))
 - MBE/VET/PRE Payments
 - 717 ([Issue Date: January 18, 2001 \(sharepoint.com\)](#))
 - 1800 screen - 718 ([Issue Date: January 18, 2001 \(sharepoint.com\)](#))
 - 719 Subcontractor payments ([Issue Date: January 18, 2001 \(sharepoint.com\)](#))
 - 720 Subcontractor projected ([Issue Date: January 18, 2001 \(sharepoint.com\)](#))
 - **R-stars payments and purchase card**, find out more about this and from prior month - 721 R*STARS Docs not in ADPICS ([Issue Date: January 18, 2001 \(sharepoint.com\)](#))
 - 722 Compliance – defined time period payments to a contract with minority participation

FMIS – ANSWERS OUTLINE

MBE/SBR/VET REPORTING

- SBR Procurement Reports
 - 68 ([PCHR068 SBR Procurement Report \(sharepoint.com\)](#))
- SBR Payments
 - 67 ([PCHR067 SMALL BUSINESS RESERVE \(SBR\) DETAIL EXPENDITURE REPORT \(sharepoint.com\)](#))
- Updated weekly on Sunday – Monday Morning data is in synch with ADPICS
 - ANSWERS MBE/SBR data is refreshed weekly from ADPICS. ANSWERS MBE/SBR data is not a complete ADPICS extract as there are exclusions and logic in the extract programs. E.g., not all BPOs are extracted especially if there exists more than one vendor on a BPO. PO releases from BPOs are not extracted unless attached to a multi-vendor BPO or coded as a TOR etc.
- There are exclusions in the data presented -
 - Procurement methods 2353 / 2354 screens
 - COR, R, PPN, XMT
 - Proc method 2 = AGY (DGS only)
 - Category of work
 - RPL, RPP
 - Objects
 - Commodity codes ([Comptroller Objects Commodities Exclusions.pdf \(sharepoint.com\)](#))
- MBEs updated monthly in ADPICS – MDOT File
- SBRs updated nightly in ADPICS – eMMA file
- VETs must be added manually by DGS



SBR/VSBE CERTIFICATION & VERIFICATION OF VENDORS IN EMMA

February 9, 2023

LET'S START WITH TWO QUESTIONS...

- 1) Are you increasing the Small Business Reserve (SBR)/Veteran-Owned Small Business Enterprise (VSBE) vendors within the eMaryland Marketplace Advantage (eMMA) portal?**

Please make certain that you are encouraging vendors to apply to the SBR/VSBE Programs.

You can forward vendors to the following Quick Reference Guides (QRGs) to apply for the programs:

<https://mdprocurement.freshdesk.com/support/solutions/articles/70000592969-sbr-certification-and-recertification-vendors-> (SBR)

<https://mdprocurement.freshdesk.com/support/solutions/articles/70000584604> (VSBE)

LET'S START WITH TWO QUESTIONS...

2) Are you checking/verifying the certification status of SBR/VSBE vendors within eMMA in regards to the SBR/VSBE designated solicitations/procurements?

*Be certain that you are confirming that the SBR/VSBE Program vendors are certified within **eMMA**.*

Vendors can only be certified through the eMMA portal.

emma.maryland.gov

SBR CERTIFICATION/VERIFICATION- AWARDS/PAYMENTS

SBR vendors must be in the SBR Program at the time of award.

“Before awarding a contract under a procurement designated as a small business reserve procurement, the procurement officer shall verify that the apparent awardee is certified by the Governor's Office of Small, Minority, and Women Business Affairs as a small business. A procurement contract award under a small business reserve procurement may not be made to a business that has not been certified.”

Code of Maryland Regulations- COMAR 21.11.01.06G

SBR CERTIFICATION/VERIFICATION- AWARDS/PAYMENTS

SBR Vendors must remain certified during the term of the SBR Designated contract for the payment award to count towards the 15% agency mandated spend.

“Only those payments resulting from a procurement designated as a small business reserve procurement may be applied towards the procurement unit’s overall small business reserve payment achievement.”

Code of Maryland Regulations- COMAR 21.11.01.06D(2)(b)

“To the extent practicable, each procurement unit shall structure its procurement procedures to achieve the result that a minimum of 15 percent of the unit's total dollar value of procurements for goods, supplies, services, maintenance, construction, construction-related services, architectural services, and engineering services are expended directly with certified small businesses at the prime contract level.”

Code of Maryland Regulations- COMAR 21.11.01.06B

VSBE CERTIFICATION/VERIFICATION

eMaryland Marketplace Advantage (eMMA) is the only platform to verify vendors in the VSBE Program.

“The veteran-owned firm shall be a certified VSBE at the time of submission of the bid or proposal.”

Code of Maryland Regulations- COMAR 21.11.14.07C(1)(B)



VERIFICATION OF CERTIFIED SBR/VSBE VENDORS (SBR/VSBE)

- **eMMA is the only platform to verify SBR and VSBE vendors in the SBR/VSBE Programs.**
- **There is an eMMA public “Vendor Search” (log-in is not required) and internal “Browse Vendors” search (log-in required) to verify SBR/VSBE vendors.**
- **If you should have any questions in regards to verifying an SBR/VSBE vendor within eMMA, please contact our office at 410-697-9600.**

EMMA PUBLIC “VENDOR SEARCH”



VERIFICATION OF CERTIFIED SBR/VSBE VENDORS (PUBLIC “VENDOR SEARCH”)

Welcome to eMaryland Marketplace Advantage (eMMA)



eMMA is Maryland's new online procurement platform used to connect the vendor community with contracting opportunities from state, county, and local government entities. Registered vendors will receive notices of bid opportunities, can submit bid responses online, and may obtain bid results online.

Qualified vendors may also complete the self-certification process for the Small Business Reserve (**SBR**) Program and Veteran-owned Small Business Enterprise (**VSBE**) Program.

eMMA facilitates an open, transparent, and efficient procurement process. We look forward to doing business with you!

Additional information can be found in the [Frequently Asked Questions](#) and [Quick Reference Guides](#). Any questions please contact the eMMA Help Desk at eMMA.helpdesk@maryland.gov.

LOGIN

Login*

Password*

Login

State SSO Login (login.md.gov)

MDoT SSO Login(MSAzure)

[Lost your password?](#)



New Vendor? Register Now



Public Solicitations



Public Contracts



Vendor Search

emma.maryland.gov

VERIFICATION OF CERTIFIED SBR/VSBE VENDORS (PUBLIC “VENDOR SEARCH”)

Keywords

Commodities

Areas Served

Company Name

eMMA Vendor ID

Country: UNITED STATES

State

Levels related with the supplier: Group, Entity

VSBE Vendor SBR Vendor

Filters: Country: UNITED STATES X Levels related with the supplier: Group Entity

You can perform a search for a specific vendor by entering the vendor name within the “Company Name” or “Keywords” field and clicking on “Search”. In addition, you can select the “VSBE Vendor”/”SBR Vendor” box when conducting your search.

eMMA Vendor ID	Company Name	City	State	Postal Code	Vendor Contact	SBR Vendor	SBR Certification #	SBR Expiration Date	VSBE Vendor	VSBE Certification #	VSBE Expiration Date
SUP831032	Acquisition Simplified, Inc.	Gwynn Oak	MD	21207	Sydnee Distance	<input checked="" type="checkbox"/>	SB22-026742	10/8/2023	<input checked="" type="checkbox"/>	VB22-029140	11/18/2023

1 Result(s)

VERIFYING VENDOR CERTIFICATION IN EMMA (PUBLIC “VENDOR SEARCH”)

eMMA Vendor ID	Company Name	City	State	Postal Code	Vendor Contact	SBR Vendor	SBR Certification #	SBR Expiration Date	VSBE Vendor	VSBE Certification #	VSBE Expiration Date
SUP831032	Acquisition Simplified, Inc.	Gwynn Oak	MD	21207	Sydnee Distance	<input checked="" type="checkbox"/>	SB22-026742	10/8/2023	<input checked="" type="checkbox"/>	VB22-029140	11/18/2023

1 Result(s)

When conducting this public “Vendor Search”, a vendor is certified within the SBR/VSBE Program when the following is provided:

- The vendor box is checked for the specific program (i.e. “SBR Vendor”/ “VSBE Vendor”).
- A valid “SBR Certification #” / “VSBE Certification #” is listed for the specific program.

AND

- A valid SBR/VSBE “Expiration Date” is listed, in which the date has not exceeded.

EMMA INTERNAL “BROWSE VENDOR” SEARCH

VERIFICATION OF CERTIFIED SBR/VSBE VENDORS (INTERNAL “BROWSE VENDOR”)

The screenshot shows the eMMA web application interface. At the top, there is a navigation bar with the eMMA logo and menu items: Vendors, Sourcing, Contracts, Catalogs, Analytics, and Admin. Below this is a breadcrumb trail: < > ⌚ ☆ Browse Vendors. The main search area contains a 'Search' button, a 'Reset' button, and a 'Keywords' input field. To the right of the 'Keywords' field are 'Alerts' and 'Commodities' dropdown menus, a 'My Commodities' checkbox, an information icon, another 'Search' button, and a 'Reset' button. The 'Keywords' field and the second 'Search' button are circled in red. On the left side, there is a 'Level' filter section with a dropdown menu showing 'Entity' selected. Below the search area, there is a 'Filters' section with 'Level: Entity' selected.

Procurement Programs

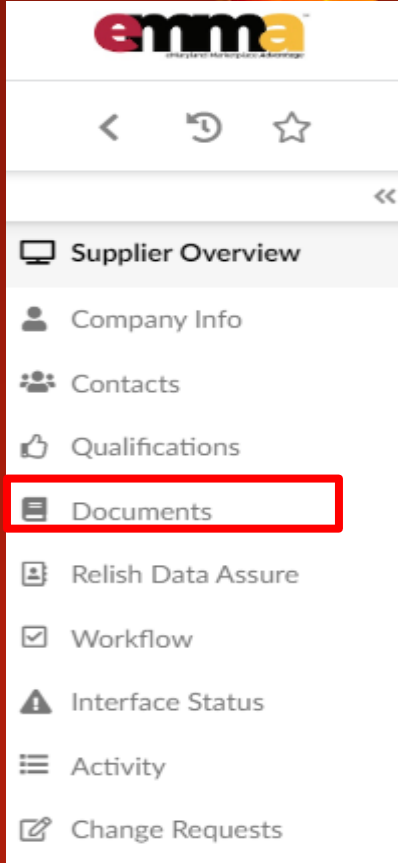
- SBR Vendor
- ACDBE Vendor
- VSBE Vendor
- SBE Vendor
- MBE Vendor
- DBE Vendor

You will need to be logged into your eMMA account to access the internal “Browse Vendor” search to verify the SBR/VSBE vendors.

Within the “Vendors” / “Browse Vendors” section, you can enter name of the company and click on the search button. Upon locating the vendor, select it to be directed to the account.

(In addition, note that there is an option to click on the “SBR Vendor” / “VSBE Vendor” box prior to conducting your search.)

VERIFICATION OF CERTIFIED SBR/VSBE VENDORS (INTERNAL “BROWSE VENDOR”)



Attestations & General Documents

[+ Add attestations & general documents](#)

Attach	Type	Status	Document Date	Expiration Date	Valid
	SBR Application	✓	10/8/2022	10/8/2023	●
Acquisition Simplified VSBE Form.pdf	VSBE Application	✓	11/18/2022	11/18/2023	●
Ownership / 1099 Attestation *					

3 Result(s)

eMMA should be used to verify the certification status of SBR/VSBE vendors prior to award of solicitations, as the vendor account has the most accurate information.

Within the vendor account, select the “Documents” tab to locate the “SBR Application”/ “VSBE Application” in the “Attestations & General Documents” section. To verify certification status, check for the specific program application, find that it has an Approved “Status” (green check mark), with a valid “Expiration Date” (i.e. date has not yet exceeded/certification not expired with a one-year certification) and it has green dot (Valid). Then, refer to the “Company Info” section for additional information...

VERIFICATION OF CERTIFIED SBR/VSBE VENDORS (INTERNAL "BROWSE VENDOR")

The screenshot displays the Emma Procurement Programs interface. On the left is a navigation sidebar with the Emma logo and menu items: Supplier Overview, Company Info (selected), Contacts, Qualifications, Documents, Relish Data Assure, Workflow, Interface Status, Activity, and Change Requests. The main content area is titled "State Programs" and contains two sections for vendor verification.

SBR Vendor Information:

Existing SBR Vendor? <input type="text" value="No"/>	Apply for the SBR Program? <input type="text" value="Yes"/>	SBR Certification # <input type="text" value="SB22-026742"/>	SBR Effective Date <input type="text" value="10/8/2022"/>	SBR Expiration Date <input type="text" value="10/8/2023"/>
<input checked="" type="checkbox"/> SBR Vendor	SBR Application Status <input type="text" value="Approved"/>			

VSBE Vendor Information:

Apply for the VSBE Program? <input type="text" value="Yes"/>	Existing VSBE Vendor? <input type="text" value="No"/>	VSBE Effective Date <input type="text" value="11/18/2022"/>	VSBE Certification # <input type="text" value="VB22-029140"/>	VSBE Expiration Date <input type="text" value="11/18/2023"/>
<input checked="" type="checkbox"/> VSBE Vendor	VSBE Application Status <input type="text" value="Approved"/>	Veteran Verification # <input type="text" value=""/>		

Upon verifying that the SBR/ VSBE Application information is listed correctly within the "Documents" section, be certain that an "SBR Certification #"/ "VSBE Certification #" is listed within the "Company Info" section, along with an "Approved" Status and a checked "SBR Vendor"/ "VSBE Vendor" box. This information will confirm that the vendor is certified in the SBR/VSBE Program.

VERIFICATION OF CERTIFIED SBR/VSBE VENDORS

Please note the following when you are attempting to verify the certification status of an SBR/VSBE vendor in eMMA:

- You may find multiple SBR/VSBE Applications listed in the “Documents” section.
- Be certain to carefully review the information to make certain that the vendor meets the requirements (i.e. SBR/VSBE Application has an approved “Status”, a valid “Expiration Date” (i.e. date has not exceeded/certification not expired with a one-year certification) and green dot (Valid) listed).
- If you are unable to determine the SBR/VSBE certification status, please contact our office for assistance.



COMBINED LIAISON TRAINING

Small Business Reserve (SBR) Program Reporting

February 9, 2023

SBR PROGRAM AND REPORTS

- COMAR 21.11.01.06
Small Business Reserve Program

<https://2019-dsd.maryland.gov/regulations/Pages/21.11.01.06.aspx>

- COMAR 21.13.01.03
Reports of the Small Business Reserve Program

<https://2019-dsd.maryland.gov/regulations/Pages/21.13.01.03.aspx>

SBR ANNUAL
AND
QUARTERLY
REPORTING

COMAR 21.13.01.03 B

Reports of the Small Business Reserve
Program.

[https://2019-
dsd.maryland.gov/regulations/Pages/21.13.01.03.aspx](https://2019-dsd.maryland.gov/regulations/Pages/21.13.01.03.aspx)

GOVERNOR'S OFFICE OF SMALL, MINORITY & WOMEN BUSINESS AFFAIRS

<https://gomdsmallbiz.maryland.gov/Pages/default.aspx>

Enter search term

Home MBE PROGRAM SBR PROGRAM VSBE Program RESOURCES PROCUREMENT FORECAST

GOVERNOR'S OFFICE OF Small, Minority & Women Business Affairs

GOVERNORS COORDINATING OFFICES HOME

Quick Links

- About Us
- FAQs
- Legislation and Policy
- Outreach
- News
- Reports
- Contact Us

SBR PROGRAM REPORTING TOOLKIT

MBE PROGRAM REPORTING TOOLKIT

VSBE PROGRAM REPORTING TOOLKIT

Maryland GOVERNOR'S OFFICE OF SMALL, MINORITY & WOMEN BUSINESS AFFAIRS

Black History Month 2023

01 FEB | 01 MAR

Know The Past, Shape The Future

23 Maryland Civil Rights Heroes

Attention SBR & VSBE Vendors

If you are experiencing problems with certification or recertification in eMMA, call us for assistance at 410-697-9600.

TOP WEBSITE PICKS

- Expanding Opportunities Magazine
- eMaryland Marketplace Advantage (eMMA)
- Maryland Financial Incentives for Businesses
- Maryland Business Express
- Maryland Entrepreneur Hub
- SBR Liaisons
- MBE Liaisons
- VSBE Liaisons
- MBE Rights & Responsibilities
- FY2021 Customer Service Annual Report

MINING PUBLIC DATA

eMaryland Marketplace Advantage (eMMA)

- Video
- Slide Deck

Procurement Forecast

- Video
- Slide Deck

Board of Public Works

- Video
- Slide Deck

Communicating with Confidence

- Video
- Slide Deck

USE THE TOOLKIT


Please utilize the SBR Toolkit to retrieve the latest reporting templates, resources, trainings, and announcements! Parts of the Small Business Reserve Program!


FY2023 2nd Quarter Report was Due

FY2023 Small Business Reserve (SBR) Quarterly Report

SBR Quarterly report data is cumulative. Quarterly Reports for the first three quarters are due no later than 30 days following the close of the quarter being reported, and should contain data from the start of the fiscal year. **No 4th quarter report is due. Instead, the 4th quarter data for the fiscal year is reported in the Annual Report. Data for the Annual Report is submitted 90 days after the close of the fiscal year.**

being reported.

 [SBR Quarterly Report Instructions](#)

 [SBR Quarterly Report Template](#)

Forward completed reports via email in EXCEL FORMAT to: sbrreports.gosba@maryland.gov

Contact SBR Compliance Managers
Lisa Mitchell Sennaar or Tanita Johnson with questions at lisa.sennaar@maryland.gov or tanita.johnson1@maryland.gov

<https://gomdsmallbiz.maryland.gov/Pages/Reporting-Tool-SBR.aspx>

SBR PROGRAM REPORTING BEST PRACTICES

- Reports need to be submitted in **Excel** format. Why?
 - Combined data is transformed into metrics
 - Measures our success
 - Allows us to see trends
- Timely data submissions. Why?
 - Allows our office time to review data for errors
 - Allows timely publication of the legislatively mandated annual report.

FY2023 QUARTERLY SUMMARY REPORT INSTRUCTIONS

SBR Quarterly report data is cumulative. Quarterly Summary Reports are due no later than 30 days following the fiscal quarter being reported and should contain data from the start of the fiscal year up to the end of the quarter being reported on.

No 4th quarter report is due. Instead, the full fiscal year is reported in the SBR Annual Summary Report.

GENERAL GUIDELINES:

The objective of the Small Business Reserve (SBR) Program.

B. Scope. To the extent practicable, each procurement unit shall structure its procurement procedures to achieve the result that a minimum of 15 percent of the unit's total dollar value of procurements for goods, supplies, services, maintenance, construction, construction-related services, architectural services, and engineering services are expended directly with certified small businesses at the prime contract level. per COMAR 21.11.01.06 (B). (b) Only those payments resulting from a procurement designated as a small business reserve procurement may be applied towards the procurement unit's overall small business reserve payment achievement.

SBR QUARTERLY REPORT TEMPLATE

AutoSave Off SBR FY 2023 Quarterly Report TEMPLATE (6) - Compatibility Mode Search

File Home Insert Page Layout Formulas Data Review View Help

Clipboard Font Alignment Number Styles

B4 July 1, 2022-

Governor's Office of Small, Minority & Women Business Affairs
FY 2023 Small Business Reserve Quarterly Summary Statement
July 1, 2022-
(Only Enter Data in Boxes Marked "link to support." "#VALUE!" Boxes are Autopopulated)

1. Total Credit Card Payments	link to support
2. Total Credit Card Payments to SBR Contractors	link to support
3. Total Procurement Payments (not including Credit Card Payments)	link to support
4. Total Dollars Paid to SBR Contractors Under a Designated SBR Procurement	link to support
5. Total Dollars Paid to SBR Contractors Under a Non-Designated Procurement	link to support
6. Total Number of SBR Contractors receiving award and payments	link to support
7. Total DESIGNATED SBR Procurement Payments (Lines 2 and 4)	#VALUE!
8. Total SBR Procurement Payments (Lines 2, 4 and 5)	#VALUE!
9. Total Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Payments to All Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Payments to All Payments (Line 8/Line 9)	#VALUE!

Agency Name: _____

Agency Head Signature: **agency head signature is not required on quarterly reports at this time**

Chief Financial Officer Signature: _____

Submitted By: _____

Title: _____

Telephone Number: _____

Submission Date: _____

Did the agency attain the 15% SBR Designated set aside? Yes or No. If agency did not attain 15% designated set aside, use the Notes section to explain the lack of attainment.

NOTES:

FY 2023 SBR Quarterly Summary P-CARD LINE1 P-CARD-SBR-LINE2 067-SCRUBBED-LINE 3 067-SBR LINE 4-5

REPORTING REQUIREMENTS

COMAR 21.13.01.03 Reports of the Small Business Reserve Program

- B. Each designated procurement unit shall submit a report on the small business reserve program to the Governor's Office of Small, Minority & Women Business Affairs within 90 days after the end of each fiscal year, in a format determined by the Governor's Office of Small, Minority & Women Business Affairs, that includes at a minimum:
 - (1) The total number and the dollar value of payments the unit made to certified small businesses under contracts designated as small business reserve contracts;
 - (2) The total number and the dollar value of payments the unit made to certified small businesses under contracts not designated as small business reserve contracts, including purchase card payments;
 - (3) The total dollar value of payments the unit made under procurement contracts; and
 - (4) Other information required by the Governor's Office of Small, Minority & Women Business Affairs.

REPORTING REQUIREMENTS

SBR units' accounting/finance departments are typically responsible for processing the majority, if not all, of the requests for payment presented by contractors doing business with the state. Once the payment transactions are completed, the payment data required for SBR reporting must be extracted from the accounting system from which the payments were made. Procurement departments are typically responsible for processing the contractor's awards and indicating whether an SBR award was "designated" or not.

REPORTING REQUIREMENTS

FMIS AGENCIES: FMIS and RSTARS contain pre-programmed reports that are available in ANSWERS to assist with SBR payment data capture and reporting. SBR report preparers are advised to review these standard reports and work directly with procurement, and accounting staff to ensure that all reportable contract payments are included in your agency's SBR Quarterly Report.



REPORTING REQUIREMENTS

MDOT iFMIS units: Should follow instructions provided by MDOT headquarters regarding SBR submissions.

SBR QUARTERLY AND ANNUAL REPORT FMIS/ANSWERS DATA COLLECTION CHECKLIST

FMIS Using Agencies If you are a FMIS using agency, you will need to access the following reports to obtain the data needed from ANSWERS to complete the template:

- 1) PCH065/067 SBR Payments Report
- 2) PCH068 SBR Designated Awards Report
- 3) PCH721 Credit Card Report (includes SBR, MBE and VSBE flags) or
VIEWDIRECT A30USB11 (optional)

SBR QUARTERLY AND ANNUAL REPORT QUALIFIED EXPENDITURES AND EXCLUSIONS

The BPW Advisory [2005-1 Small Business Reserve Program](#) and the [GAD List](#) (also known as the Comptroller Objects Commodity Exclusion List) included in the SBR Reporting toolkit on the GOSBA website provides guidance in determining whether a payment or group of payments is/are exempt from SBR reporting. SBR units should contact the Department of General Services (DGS) Office of State Procurement (OSP) as it is now the control agency, their AGs and/or GOSBA with questions regarding items that may/may not be reportable.

BPW ADVISORY 2005-1 SMALL BUSINESS RESERVE PROGRAM

QUALIFIED EXPENDITURES AND EXCLUSIONS

- **Exclusions:**

- Where governing federal law or federal grant provisions conflict with this Small Business Reserve Program, the procurement is excluded from these requirements.
- Procurements from Maryland Correctional Enterprises, Blind Industries and Services of Maryland, and the Employment Works Program ([COMAR 21.11.05](#)) and from Maryland Vending Facilities Program for the Blind ([COMAR 21.11.09](#)) are excluded from these requirements.
- The value of excluded procurements is not included in the procurement dollar base from which the 15% reserve is calculated.

PCH065/067 SBR PAYMENTS REPORT

RAW DATA

	A	B	C	D	E	G	H	I	J	K	L	M	N	O	P	Q	R
	Department Title	Dept Code	Proc Method	Work Category	Voucher Id	Vendor Name	Po Bpo Id	Effective Date	Contract Title	Voucher Amount	Reportable Amount	SBR Ven	SBR Procure Ind	MBE Status	Due Date	Line No - Comm Id	
2	DHS - CHARLE	N0801	CSB	S	N00V2606336		4.35025E+11 N00B2600223	10/13/2021	CHA FAC 22.00	\$3,000.00	\$3,000.00	Y	Y		1/13/2022	001 - 95215XXXXXX	
3	DHS - CHARLE	N0801	CSB	S	N00V2606337		4.35025E+11 N00B2600223	10/13/2021	CHA FAC 22.00	\$6,000.00	\$6,000.00	Y	Y		1/21/2022	001 - 95215XXXXXX	
4	DHS - CHARLE	N0801	CSB	S	N00V2606338		4.35025E+11 N00B2600223	10/13/2021	CHA FAC 22.00	\$6,000.00	\$6,000.00	Y	Y		1/21/2022	001 - 95215XXXXXX	
5	DHS - CHARLE	N0801	CSB	S	N00V2608608		4.35025E+11 N00B2600223	10/13/2021	CHA FAC 22.00	\$6,000.00	\$6,000.00	Y	Y		3/25/2022	001 - 95215XXXXXX	
6	DHS - CHARLE	N0801	CSB	S	N00V2609342		4.35025E+11 N00B2600223	10/13/2021	CHA FAC 22.00	\$6,000.00	\$6,000.00	Y	Y		4/8/2022	001 - 95215XXXXXX	
7	DHS - CHARLE	N0801	CSB	S	N00V2611405		4.35025E+11 N00B2600223	10/13/2021	CHA FAC 22.00	\$6,000.00	\$6,000.00	Y	Y		5/27/2022	001 - 95215XXXXXX	
8	DHS - CHARLE	N0801	CSB	S	N00V2611407		4.35025E+11 N00B2600223	10/13/2021	CHA FAC 22.00	\$6,000.00	\$6,000.00	Y	Y		5/27/2022	001 - 95215XXXXXX	
9	DHS - CHARLE	N0801	CSB	S	N00V2613027		4.35025E+11 N00B2600223	10/13/2021	CHA FAC 22.00	\$6,000.00	\$6,000.00	Y	Y		6/28/2022	001 - 95215XXXXXX	
10	DHS - CHARLE	N0801	CSB	S	N00V2613028		4.35025E+11 N00B2600223	10/13/2021	CHA FAC 22.00	\$3,000.00	\$3,000.00	Y	Y		6/28/2022	001 - 95215XXXXXX	
11	DHS - HOWAR	N1301	SP	S	N00V2601276		4.35025E+11 N00P1602615	5/1/2021	FATHER ENGA	\$5,000.00	\$5,000.00	Y	Y		8/20/2021	001 - 92045E75002	
12	DHS - HOWAR	N1301	SP	S	N00V2603106		4.35025E+11 N00P2600881	8/23/2021	FATHER SERV	\$2,000.00	\$2,000.00	Y	Y		11/6/2021	001 - 92045E75002	
13	DHS - HOWAR	N1301	SP	S	N00V2604785		4.35025E+11 N00P2600881	8/23/2021	FATHER SERV	\$2,000.00	\$2,000.00	Y	Y		12/11/2021	001 - 92045E75002	
14	DHS - HOWAR	N1301	SP	S	N00V2606165		4.35025E+11 N00P2600881	8/23/2021	FATHER SERV	\$2,000.00	\$2,000.00	Y	Y		1/10/2022	001 - 92045E75002	
15	DHS - PRINCE	N1601	CSB	S	N00V2601864		4.35025E+11 N00P1602629	5/13/2021	FATHERS ENC	\$6,000.00	\$0.00	Y			8/31/2021	001 - 95215	
16	DHS - PRINCE	N1601	CSB	S	N00V2606730		4.35025E+11 N00P1602629	5/13/2021	FATHERS ENC	\$6,000.00	\$0.00	Y			1/22/2022	001 - 95215	
17	DHS - HARFO	N1201	SP	CSE	N00V2600633	21ST CENTURY SECURITY DBA PROSH	N00P1600542	7/27/2020	PAPER SHRE	\$60.00	\$60.00	Y			7/22/2021	001 - 96671	
18	DHS - HARFO	N1201	SP	CSE	N00V2600634	21ST CENTURY SECURITY DBA PROSH	N00P2600264	7/9/2021	SHREDDING S	\$60.00	\$60.00	Y			7/22/2021	001 - 96671	
19	DHS - HARFO	N1201	SP	CSE	N00V2601556	21ST CENTURY SECURITY DBA PROSH	N00P2600264	7/9/2021	SHREDDING S	\$60.00	\$60.00	Y			8/19/2021	001 - 96671	
20	DHS - HARFO	N1201	SP	CSE	N00V2601671	21ST CENTURY SECURITY DBA PROSH	N00P2600264	7/9/2021	SHREDDING S	\$60.00	\$60.00	Y			8/24/2021	001 - 96671	
21	DHS - HARFO	N1201	SP	CSE	N00V2602531	21ST CENTURY SECURITY DBA PROSH	N00P2600264	7/9/2021	SHREDDING S	\$60.00	\$60.00	Y			9/21/2021	001 - 96671	
22	DHS - HARFO	N1201	SP	CSE	N00V2602863	21ST CENTURY SECURITY DBA PROSH	N00P2600264	7/9/2021	SHREDDING S	\$60.00	\$60.00	Y			10/5/2021	001 - 96671	
23	DHS - HARFO	N1201	SP	CSE	N00V2603364	21ST CENTURY SECURITY DBA PROSH	N00P2600264	7/9/2021	SHREDDING S	\$60.00	\$60.00	Y			10/19/2021	001 - 96671	
24	DHS - HARFO	N1201	SP	CSE	N00V2604391	21ST CENTURY SECURITY DBA PROSH	N00P2600264	7/9/2021	SHREDDING S	\$60.00	\$60.00	Y			11/16/2021	001 - 96671	
25	DHS - HARFO	N1201	SP	CSE	N00V2605832	21ST CENTURY SECURITY DBA PROSH	N00P2600264	7/9/2021	SHREDDING S	\$60.00	\$60.00	Y			12/23/2021	001 - 96671	
26	DHS - HARFO	N1201	SP	CSE	N00V2605833	21ST CENTURY SECURITY DBA PROSH	N00P2600264	7/9/2021	SHREDDING S	\$60.00	\$60.00	Y			12/23/2021	001 - 96671	
27	DHS - HARFO	N1201	SP	CSE	N00V2606232	21ST CENTURY SECURITY DBA PROSH	N00P2600264	7/9/2021	SHREDDING S	\$60.00	\$60.00	Y			1/11/2022	001 - 96671	
28	DHS - HARFO	N1201	SP	CSE	N00V2607971	21ST CENTURY SECURITY DBA PROSH	N00P2600264	7/9/2021	SHREDDING S	\$70.00	\$70.00	Y			2/24/2022	001 - 96671	
29	DHS - HARFO	N1201	SP	CSE	N00V2608572	21ST CENTURY SECURITY DBA PROSH	N00P2600264	7/9/2021	SHREDDING S	\$60.00	\$60.00	Y			3/10/2022	001 - 96671	
30	DHS - HARFO	N1201	SP	CSE	N00V2609019	21ST CENTURY SECURITY DBA PROSH	N00P2600264	7/9/2021	SHREDDING S	\$60.00	\$60.00	Y			3/22/2022	001 - 96671	
31	DHS - HARFO	N1201	SP	CSE	N00V2609487	21ST CENTURY SECURITY DBA PROSH	N00P2600264	7/9/2021	SHREDDING S	\$60.00	\$60.00	Y			4/5/2022	001 - 96671	
32	DHS - HARFO	N1201	SP	CSE	N00V2611154	21ST CENTURY SECURITY DBA PROSH	N00P2600264	7/9/2021	SHREDDING S	\$60.00	\$60.00	Y			5/12/2022	001 - 96671	
33	DHS - HARFO	N1201	SP	CSE	N00V2611155	21ST CENTURY SECURITY DBA PROSH	N00P2600264	7/9/2021	SHREDDING S	\$60.00	\$60.00	Y			5/12/2022	001 - 96671	
34	DHS - HARFO	N1201	SP	CSE	N00V2611156	21ST CENTURY SECURITY DBA PROSH	N00P2600264	7/9/2021	SHREDDING S	\$60.00	\$60.00	Y			5/12/2022	001 - 96671	
35	DHS - HARFO	N1201	SP	CSE	N00V2611509	21ST CENTURY SECURITY DBA PROSH	N00P2600264	7/9/2021	SHREDDING S	\$60.00	\$60.00	Y			5/19/2022	001 - 96671	

PCH065/067 SBR PAYMENTS REPORT

TABS IN EXCEL TEMPLATE

9. Total Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Payments to All Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Payments to All Payments (Line 8/Line 9)	#VALUE!
Agency Name:	
Agency Head Signature:	agency head signature is not required on quarterly reports at this time

PCH065/067 SBR PAYMENTS REPORT

SCRUBBED LINE 3 OF THE SUMMARY STATEMENT

Microsoft Excel interface showing the "FY 2023 Small Business Reserve Quarterly Summary Statement" for July 1, 2022-.

Agency Name: [Yellow box]

Agency Head Signature: agency head signature is not required on quarterly reports at this time

Line Item	Description	Value
1.	Total Credit Card Payments	link to support
2.	Total Credit Card Payments to SBR Contractors	link to support
3.	Total Procurement Payments (not including Credit Card Payments)	link to support
4.	Total Dollars Paid to SBR Contractors Under a Designated SBR Procurement	link to support
5.	Total Dollars Paid to SBR Contractors Under a Non-Designated Procurement	link to support
6.	Total Number of SBR Contractors receiving award and payments	link to support
7.	Total DESIGNATED SBR Procurement Payments (Lines 2 and 4)	#VALUE!
8.	Total SBR Procurement Payments (Lines 2, 4 and 5)	#VALUE!
9.	Total Procurement Payments (Lines 1 and Line 3)	#VALUE!
10.	Percentage All SBR Designated Payments to All Payments (Line 7/Line 9)	#VALUE!
11.	Percentage All SBR Payments to All Payments (Line 8/Line 9)	#VALUE!

Navigation tabs at the bottom: P-CARD LINE1 | P-CARD-SBR-LINE2 | 067-SCRUBBED-LINE 3 | 067-SBR LINE 4-5 | 067-RAWDATA | Line6- T factor ...

PCH065/067 SBR PAYMENTS REPORT

SCRUBBED LINE 4 OF THE SUMMARY STATEMENT

File Home Insert Page Layout Formulas Data Review View Help

Default

Keep Exit New Options

Normal Page Break Preview Page Layout Custom Views

Navigation Gridlines Headings

Zoom 100% Zoom to Selection

New Window Arrange All Freeze Panes Hide Unhide

View Side by Side Synchronous Scrolling Reset Window Position Switch Windows

Sheet View Workbook Views Show Zoom Window

A1 Department Title

	A	B	C	D	E	G	H	J	K	L	M	N	O
1	Department	Dept Code	Proc Meth	Work Cate	Voucher I	Vendor Name	Po	Contract Title	Voucher Am	Reportable Am	SBR Vend	SBR Procure Ind	
56	DHS- WA: N2101	SP	S	N00V2601	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 JANITORIAL SERVICES FO	\$1,166.36	\$1,166.36	Y	Y	
57	DHS- WA: N2101	SP	S	N00V2602	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 JANITORIAL SERVICES FO	\$1,166.36	\$1,166.36	Y	Y	
58	DHS- WA: N2101	SP	S	N00V2602	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 SUNSHINE CENTER CLEAN	\$583.27	\$583.27	Y	Y	
59	DHS- WA: N2101	SP	S	N00V2603	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 SUNSHINE CENTER CLEAN	\$583.27	\$583.27	Y	Y	
60	DHS- WA: N2101	SP	S	N00V2603	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 JANITORIAL SERVICES FO	\$1,166.36	\$1,166.36	Y	Y	
61	DHS- WA: N2101	SP	S	N00V2604	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 SUNSHINE CENTER CLEAN	\$583.27	\$583.27	Y	Y	
62	DHS- WA: N2101	SP	S	N00V2604	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 JANITORIAL SERVICES FO	\$1,166.36	\$1,166.36	Y	Y	
63	DHS- WA: N2101	SP	S	N00V2605	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 SUNSHINE CENTER CLEAN	\$583.27	\$583.27	Y	Y	
64	DHS- WA: N2101	SP	S	N00V2605	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 JANITORIAL SERVICES FO	\$1,166.36	\$1,166.36	Y	Y	
65	DHS- WA: N2101	SP	S	N00V2606	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 JANITORIAL SERVICES FO	\$1,166.36	\$1,166.36	Y	Y	
66	DHS- WA: N2101	SP	S	N00V2606	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 SUNSHINE CENTER CLEAN	\$583.27	\$583.27	Y	Y	
67	DHS- WA: N2101	SP	S	N00V2607	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 SUNSHINE CENTER CLEAN	\$583.27	\$583.27	Y	Y	
68	DHS- WA: N2101	SP	S	N00V2607	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 JANITORIAL SERVICES FO	\$1,166.36	\$1,166.36	Y	Y	
69	DHS- WA: N2101	SP	S	N00V2609	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 JANITORIAL SERVICES FO	\$1,166.36	\$1,166.36	Y	Y	
70	DHS- WA: N2101	SP	S	N00V2609	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 SUNSHINE CENTER CLEAN	\$583.27	\$583.27	Y	Y	
71	DHS- WA: N2101	SP	S	N00V2610	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 SUNSHINE CENTER CLEAN	\$583.27	\$583.27	Y	Y	
72	DHS- WA: N2101	SP	S	N00V2610	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 JANITORIAL SERVICES FO	\$1,166.36	\$1,166.36	Y	Y	
73	DHS- WA: N2101	SP	S	N00V2611	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 JANITORIAL SERVICES FO	\$1,166.36	\$1,166.36	Y	Y	
74	DHS- WA: N2101	SP	S	N00V2611	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 SUNSHINE CENTER CLEAN	\$583.27	\$583.27	Y	Y	
75	DHS- WA: N2101	SP	S	N00V2612	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 JANITORIAL SERVICES FO	\$1,166.36	\$1,166.36	Y	Y	
76	DHS- WA: N2101	SP	S	N00V2612	W I L E S	COMMERCIAL CLEANING INC	N0	FY22 SUNSHINE CENTER CLEAN	\$583.27	\$583.27	Y	Y	
77													
78									Total of all designated SBR payments vendors - LINE 4	\$220,769			
79													

on

Activ

PCH065/067 SBR PAYMENTS REPORT

TABS IN EXCEL TEMPLATE

9. Total Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Payments to All Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Payments to All Payments (Line 8/Line 9)	#VALUE!
Agency Name:	
Agency Head Signature:	agency head signature is not required on quarterly reports at this time

... | P-CARD LINE1 | P-CARD-SBR-LINE2 | 067-SCRUBBED-LINE 3 | 067-SBR LINE 4-5 | 067-RAWDATA | Line6- T factor ... (+) ⋮

PCH065/067 SBR PAYMENTS REPORT

SCRUBBED LINE 4 OF THE SUMMARY STATEMENT

Microsoft Excel interface showing the "FY 2023 Small Business Reserve Quarterly Summary Statement" for July 1, 2022. The report is titled "Governor's Office of Small, Minority & Women Business Affairs". A red arrow points to line 4, which is highlighted in yellow and contains the text "link to support".

Governor's Office of Small, Minority & Women Business Affairs	
FY 2023 Small Business Reserve Quarterly Summary Statement	
July 1, 2022-	
(Only Enter Data in Boxes Marked "link to support." "#VALUE!" Boxes are Autopopulated)	
1. Total Credit Card Payments	link to support
2. Total Credit Card Payments to SBR Contractors	link to support
3. Total Procurement Payments (not including Credit Card Payments)	link to support
4. Total Dollars Paid to SBR Contractors Under a Designated SBR Procurement	link to support
5. Total Dollars Paid to SBR Contractors Under a Non-Designated Procurement	link to support
6. Total Number of SBR Contractors receiving award and payments	link to support
7. Total DESIGNATED SBR Procurement Payments (Lines 2 and 4)	#VALUE!
8. Total SBR Procurement Payments (Lines 2, 4 and 5)	#VALUE!
9. Total Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Payments to All Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Payments to All Payments (Line 8/Line 9)	#VALUE!
Agency Name:	
Agency Head Signature:	agency head signature is not required on quarterly reports at this time

PCH065/067 SBR PAYMENTS REPORT

SCRUBBED LINE 5 OF THE SUMMARY STATEMENT

1	A	B	C	D	E	G	H	I	J	K	L	M	P	Q
	Department	Dept Code	Proc Meth	Work Cate	Voucher Id	Vendor Name	Po Bpo Id	Effective Date	Contract T	Voucher Amo	Reportable Amo	SBR Vend		
2	DHS - SY	N0006	CSP	ITE	N00V2602	ADVANCED COMPU	060B2490	11/15/2012	HARDWAI	\$119,824.38	\$119,824.38	Y		
3	DHS - SY	N0006	CSP	ITE	N00V2603	ADVANCED COMPU	060B2490	11/15/2012	HARDWAI	\$107,961.90	\$107,961.90	Y		
4	DHS - SY	N0006	CSP	ITW	N00V2607	ADVANCED COMPU	060B2490	10/1/2012	COTS SOI	\$104,083.00	\$104,083.00	Y		
5	DHS - SY	N0006	SP	ITE	N00V2600	ADVANCED COMPU	N00P1602	5/24/2021	SERVICE	\$16,459.47	\$16,459.47	Y		
6	DHS - CHI	N0008	ICP	CSE	N00V2600	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$927.48	\$927.48	Y		
7	DHS - FAI	N0009	ICP	CSE	N00V2608	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$63.19	\$63.19	Y		
8	DHS - ADI	N0012	ICP	CSE	N00V2605	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$803.50	\$803.50	Y		
9	DHS - ALL	N0101	ICP	CSE	N00V2607	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$1,778.76	\$1,778.76	Y		
10	DHS - CAI	N0401	ICP	CSE	N00V2612	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$829.80	\$829.80	Y		
11	DHS - CE	N0701	ICP	CSE	N00V2601	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$1,693.20	\$1,693.20	Y		
12	DHS - CE	N0701	ICP	CSE	N00V2605	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$1,693.20	\$1,693.20	Y		
13	DHS - CE	N0701	ICP	CSE	N00V2607	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$56.34	\$56.34	Y		
14	DHS - CE	N0701	ICP	CSE	N00V2607	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$17.48	\$17.48	Y		
15	DHS - CE	N0701	ICP	CSE	N00V2607	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$112.98	\$112.98	Y		
16	DHS - CE	N0701	ICP	CSE	N00V2607	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$322.16	\$322.16	Y		
17	DHS - CE	N0701	ICP	CSE	N00V2607	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$12.72	\$12.72	Y		
18	DHS - CE	N0701	ICP	CSE	N00V2607	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$5.38	\$5.38	Y		
19	DHS - CE	N0701	ICP	CSE	N00V2607	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$74.95	\$74.95	Y		
20	DHS - CE	N0701	ICP	CSE	N00V2607	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$17.48	\$17.48	Y		
21	DHS - CE	N0701	ICP	CSE	N00V2611	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$362.93	\$362.93	Y		
22	DHS - CE	N0701	ICP	CSE	N00V2611	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$156.50	\$156.50	Y		
23	DHS - CE	N0701	ICP	CSE	N00V2611	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$53.50	\$53.50	Y		
24	DHS - CE	N0701	ICP	CSE	N00V2611	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$1,693.20	\$1,693.20	Y		
25	DHS - CE	N0701	ICP	CSE	N00V2611	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$423.30	\$423.30	Y		
26	DHS - CE	N0701	ICP	CSE	N00V2611	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$247.49	\$247.49	Y		
27	DHS - CE	N0701	ICP	CSE	N00V2611	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$27.58	\$27.58	Y		
28	DHS - HAI	N1201	ICP	CSE	N00V2605	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$129.50	\$129.50	Y		
29	DHS - HAI	N1201	ICP	CSE	N00V2605	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$554.81	\$554.81	Y		
30	DHS - HAI	N1201	ICP	CSE	N00V2605	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$185.60	\$185.60	Y		
31	DHS - HAI	N1201	ICP	CSE	N00V2605	AJ STATIONERS	001B0600	3/3/2020	OFFICE S	\$332.53	\$332.53	Y		
32	DHS - FREN	1001	SP	S	N00V2600	ALL CLEAN INC	N00P1601	1/4/2021	ALL CLEA	\$1,975.00	\$1,975.00	Y		

PCH065/067 SBR PAYMENTS REPORT

SCRUBBED LINE 5 OF THE SUMMARY STATEMENT

Microsoft Excel interface showing the "Governor's Office of Small, Minority & Women Business Affairs FY 2023 Small Business Reserve Quarterly Summary Statement" for July 1, 2022. The report includes a table with 11 summary rows and an agency signature field. A red arrow points to row 5, which is highlighted in yellow and contains the text "link to support".

Governor's Office of Small, Minority & Women Business Affairs	
FY 2023 Small Business Reserve Quarterly Summary Statement	
July 1, 2022-	
(Only Enter Data in Boxes Marked "link to support." "#VALUE!" Boxes are Autopopulated)	
1. Total Credit Card Payments	link to support
2. Total Credit Card Payments to SBR Contractors	link to support
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6. Total Number of SBR Contractors receiving award and payments	link to support
7. Total DESIGNATED SBR Procurement Payments (Lines 2 and 4)	#VALUE!
8. Total SBR Procurement Payments (Lines 2, 4 and 5)	#VALUE!
9. Total Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Payments to All Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Payments to All Payments (Line 8/Line 9)	#VALUE!
Agency Name:	
Agency Head Signature: agency head signature is not required on quarterly reports at this time	

PCH068 RAW SBR DESIGNATED AWARDS REPORT

LINES 6 OF THE SUMMARY STATEMENT

	A	B	C	D	E	F	G	I	J	K	L	M	N	O	P	Q	R
1	Agency Name	Agency Cr	Proc Meth	Work Cate	Po Bpo Id	Amount	Effective Date	Vendor Name	SBR Ind	SBR Vend	Description						
1204	Department of Hi N00	SP	CSE	N00P2601		\$212.64	10/20/2021	PROMOTIONS UNLIMITED INC			PROMO ITEMS FOR LGA MONTH						GENERAL
1205	Department of Hi N00	SP	CSE	N00P2601		\$2,323.50	10/22/2021	PROMOTIONS UNLIMITED INC			PROMOTIONAL ITEMS						SERVICES/TIN
1206	Department of Hi N00	SP	CSE	N00P2601		\$1,274.00	10/28/2021	PROMOTIONS UNLIMITED INC			HAND SANITIZERS						CHILD SUPPORT
1207	Department of Hi N00	SP	CSE	N00P2601		\$1,475.00	11/5/2021	PROMOTIONS UNLIMITED INC			1 BOX OF 1000 DHS AGENCY LAPEL PINS FOR AGENCY STAFF MANAGE						
1208	Department of Hi N00	SP	CSE	N00P2601		\$358.00	12/9/2021	PROMOTIONS UNLIMITED INC			SUPPLY NEEDED FOR HRDT						
1209	Department of Hi N00	SP	CSE	N00P2601		\$592.00	12/8/2021	PROMOTIONS UNLIMITED INC			LDI 2021 CERTIFICATE HOLDERS. QUANTITY: 50.						
1210	Department of Hi N00	SP	CSE	N00P2601		\$817.00	12/9/2021	PROMOTIONS UNLIMITED INC			5 X 7 FRAMES						
1211	Department of Hi N00	SP	CSE	N00P2601		\$1,829.25	12/9/2021	PROMOTIONS UNLIMITED INC			PADFOLIOS AND TOTE BAGS						
1212	Department of Hi N00	SP	CSE	N00P2601		\$2,610.00	12/14/2021	PROMOTIONS UNLIMITED INC			PROMO CALANDARS						SERVICES/TIN
1213	Department of Hi N00	SP	CSE	N00P2602		\$679.80	2/4/2022	PROMOTIONS UNLIMITED INC		Y	AWARDS FOR LDI 2020 AND 2021 CLASS SESSION, 10 AWARDS TOTAL						
1214	Department of Hi N00	SP	CSE	N00P2602		\$278.00	2/22/2022	PROMOTIONS UNLIMITED INC		Y	IMPRINTED TABLECLOTH						KINDSHIP/SE
1215	Department of Hi N00	SP	CSE	N00P2602		\$3,273.00	3/22/2022	PROMOTIONS UNLIMITED INC		Y	PROMOTIONAL TOKEN/GIVEAWAYS FOR RECRUITMENT						
1216	Department of Hi N00	SP	CSE	N00P2602		\$2,323.96	4/15/2022	PROMOTIONS UNLIMITED INC		Y	PROMOTIONL ITEMS						SERVICES/TINA
1217	Department of Hi N00	SP	CSE	N00P2602		\$3,041.00	4/14/2022	PROMOTIONS UNLIMITED INC	Y	Y	PROMOTIONAL ITEMS						
1218	Department of Hi N00	SP	CSE	N00P2602		\$2,326.50	4/19/2022	PROMOTIONS UNLIMITED INC		Y	PROMO ITEMS FOR KINSHIP EVENTS						SERVIC
1219	Department of Hi N00	SP	CSE	N00P2602		\$3,239.00	4/18/2022	PROMOTIONS UNLIMITED INC		Y	PROMOTION ITEMS						
1220	Department of Hi N00	SP	CSE	N00P2602		\$8,332.32	5/3/2022	PROMOTIONS UNLIMITED INC		Y	PROMO ITEMS						WISH/DOROTHEA
1221	Department of Hi N00	SP	CSE	N00P2602		\$1,339.56	5/18/2022	PROMOTIONS UNLIMITED INC	Y	Y	PROMOTIONAL ITEMS FOR RECRUITMENT TO PROMOTE PROJECT HOM						
1222	Department of Hi N00	SP	CSE	N00P2602		\$3,216.00	5/19/2022	PROMOTIONS UNLIMITED INC		Y	PROMOTIONAL ITEMS, HAND SANITIZER, NAIL CLIPPER, TRAVEL TOOTH						
1223	Department of Hi N00	SP	CSE	N00P2602		\$4,330.00	5/23/2022	PROMOTIONS UNLIMITED INC		Y	PROMOTIONAL BACKPACKS						WISH/DOR
1224	Department of Hi N00	SP	CSE	N00P2602		\$11,004.90	5/24/2022	PROMOTIONS UNLIMITED INC		Y	PROMO ITEMS						SERVICES/TINA LI
1225	Department of Hi N00	SP	CSE	N00P2603		\$3,083.50	5/31/2022	PROMOTIONS UNLIMITED INC	Y	Y	PROMOTIONAL ITEMS						
1226	Department of Hi N00	SP	CSE	N00P2603		\$3,102.85	6/2/2022	PROMOTIONS UNLIMITED INC		Y	PROMOTIONAL ITEMS FOR SERVICES						
1227	Department of Hi N00	SP	CSE	N00P2603		\$2,889.00	6/3/2022	PROMOTIONS UNLIMITED INC	Y	Y	PROMOTIONAL ITEMS						
1228	Department of Hi N00	SP	CSE	N00P2603		\$1,339.56	6/7/2022	PROMOTIONS UNLIMITED INC		Y	PROMOTIONAL ITEMS CLASSIC POLYESTER CINCH BACKPACK						
1229	Department of Hi N00	SP	CSE	N00P2603		\$1,679.00	6/24/2022	PROMOTIONS UNLIMITED INC	Y	Y	PROMOTIONAL ITEMS						
1230	Department of Hi N00	SP	CSE	N00P2603		\$933.25	6/28/2022	PROMOTIONS UNLIMITED INC		Y	PROMOTIONAL ITEMS						
1231	Department of Hi N00	SP	S	N00P2601		\$3,458.00	10/22/2021	PROMOTIONS UNLIMITED INC			PROMOTIONAL FOR THE FOSTER FAMILIES						
1232	Department of Hi N00	SP	S	N00P2602		\$1,480.30	4/21/2022	PROMOTIONS UNLIMITED INC		Y	ITEMS -PROMOTIONAL ITEMS						
1233	Department of Hi N00	SP	S	N00P2603		\$2,671.80	6/6/2022	PROMOTIONS UNLIMITED INC		Y	PROMOTIONAL ITEMS						
1234	Department of Hi N00	SP	S	N00P2603		\$934.00	6/7/2022	PROMOTIONS UNLIMITED INC		Y	PROMOTIONAL ITEMS OUTREACH						

SCRUBBED PCH068 SBR AWARDS REPORT

LINES 6 T- FACTOR OF THE SUMMARY STATEMENT

The screenshot shows an Excel spreadsheet with the following data in column A:

Row	Vendor Name
777	WILLES COMMERCIAL CLEANING INC
778	WILLES COMMERCIAL CLEANING INC
779	WILLES COMMERCIAL CLEANING INC
780	WILLES COMMERCIAL CLEANING INC
781	WILLES COMMERCIAL CLEANING INC
782	WILLES COMMERCIAL CLEANING INC
783	WILLES COMMERCIAL CLEANING INC
784	WILLES COMMERCIAL CLEANING INC
785	WILLES COMMERCIAL CLEANING INC
786	WILLES COMMERCIAL CLEANING INC
787	WILLES COMMERCIAL CLEANING INC
788	WILLES COMMERCIAL CLEANING INC
789	WILLES COMMERCIAL CLEANING INC
790	WALTERS RELOCATIONS INC
791	
792	55 unique SBR vendors
793	
794	
795	
796	
797	
798	
799	
800	
801	
802	
803	
804	
805	
806	
807	
808	

The summary row (792) has a value of 55 in column A. A red arrow points to this row. A green box highlights cell D799, which is currently empty. The spreadsheet title bar shows 'Line 6- T factor' is the active sheet.

ENTER TOTAL NUMBER OF VENDORS FROM PCH068 SBR DESIGNATED AWARDS REPORT FOR LINE 6 OF THE SUMMARY STATEMENT

File Home Insert Page Layout Formulas Data Review View Help

Paste Cut Copy Format Painter Clipboard

Arial 14 A A B I U Font Merge & Center Alignment Number Styles Cells

B4

A B C

1

2 Governor's Office of Small, Minority & Women Business Affairs

3 FY 2023 Small Business Reserve Quarterly Summary Statement

4 July 1, 2022-

5 (Only Enter Data in Boxes Marked "link to support." "#VALUE!" Boxes are Autopopulated)

6

7

8

9

10

11

1. Total Credit Card Payments	link to support
2. Total Credit Card Payments to SBR Contractors	link to support
3. Total Procurement Payments (not including Credit Card Payments)	link to support
4. Total Dollars Paid to SBR Contractors Under a Designated SBR Procurement	link to support
5. Total Dollars Paid to SBR Contractors Under a Non-Designated Procurement	link to support
6. Total Number of SBR Contractors receiving award and payments	link to support



SBR QUARTERLY AND ANNUAL REPORT PCH721 CREDIT CARD REPORT

The credit card reports can be accessed from RSTARS View Direct, ANSWERS PCH 721 reports, or directly from the USB monthly bank transaction statements. Each credit card administrator should have access to the Level 3 credit card report which provides more detailed information regarding items purchased.

PCH721 CREDIT CARD REPORT

	A	B	C	D	E	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	Departmer	Departmer	Batch_Age	MBE_Type	MBE_Desig	Vendor_Name	MBE_Cert	MBE_Excl	Effective_Date	Cur_Doc_	Cur_Doc_	Number_Tran	Payment_Amt	Reportable	Reportable	Vet_Flag	SBR_Flag	Pref_Provider	
2	N00	Departmer	N00			1800CEILING	N		12/1/2021	CPC		1	\$234.00						
3	N00	Departmer	N00			2022 RAISING THE BAR C	N		6/1/2022	CPC		2	\$1,500.00						
4	N00	Departmer	N00			37SIGNALS.COM	N		7/1/2021	CPC		1	\$99.00						
5	N00	Departmer	N00			4 ALL PROMO'S / K-READ	N		1/1/2022	CPC		1	\$496.00						
6	N00	Departmer	N00			4TE NEC CLOUD COMMUNICATI	N		12/1/2021	CPC		1	\$1,600.00						
7	N00	Departmer	N00			4TE NEC CORPORATION OF AM	N		4/1/2022	CPC		1	\$452.00						
8	N00	Departmer	N00			60261 - 25 SOUTH CHARLES	N		2/1/2022	CPC		1	\$26.00						
9	N00	Departmer	N00			AAICPC	N		5/1/2022	CPC		1	\$650.00						
10	N00	Departmer	N00			ABCO INVESTIGATIONS	N		10/1/2021	CPC		1	\$95.00						
11	N00	Departmer	N00			ACCENT IMAGING	N		11/1/2021	CPC		1	\$34.00						
12	N00	Departmer	N00			ACF TECHNOLOGIES INC	N		11/1/2021	CPC		1	\$177.00						
13	N00	Departmer	N00			ACM CHESAPEAKE	N		9/1/2021	CPC		1	\$115.00						
14	N00	Departmer	N00			ACM CHESAPEAKE	N		10/1/2021	CPC		1	\$125.00						
15	N00	Departmer	N00			ACM CHESAPEAKE	N		11/1/2021	CPC		1	\$139.00						
16	N00	Departmer	N00			ACM CHESAPEAKE	N		2/1/2022	CPC		1	\$264.00						
17	N00	Departmer	N00			ACM CONTINUING EDUCATIO	N		9/1/2021	CPC		1	\$79.00						
18	N00	Departmer	N00			ACME MARKETS	N		11/1/2021	CPC		1	\$57.00						
19	N00	Departmer	N00			ACME MARKETS	N		12/1/2021	CPC		1	\$240.00						
20	N00	Departmer	N00			ACME MARKETS	N		1/1/2022	CPC		1	\$20.00						
21	N00	Departmer	N00			ACOUSTIMAC	N		1/1/2022	CPC		1	\$582.00						
22	N00	Departmer	N00			ACTIVE.COM	N		5/1/2022	CPC		1	\$50.00						
23	N00	Departmer	N00			AD ASTRA INC	N		11/1/2021	CPC		8	\$2,156.00						
24	N00	Departmer	N00			AD ASTRA INC	N		12/1/2021	CPC		6	\$452.00						
25	N00	Departmer	N00			AD ASTRA INC	N		3/1/2022	CPC		9	\$1,925.00						
26	N00	Departmer	N00			AD ASTRA INC	N		4/1/2022	CPC		9	\$3,270.00						
27	N00	Departmer	N00			AD ASTRA INC	N		5/1/2022	CPC		7	\$2,551.00						
28	N00	Departmer	N00			AD ASTRA INC	N		6/1/2022	CPC		12	\$5,325.00						
29	N00	Departmer	N00			ADOBE SYSTEMS	N		7/1/2021	CPC		1	\$31.00						
30	N00	Departmer	N00			ADOBE SYSTEMS	N		8/1/2021	CPC		1	\$31.00						
31	N00	Departmer	N00			ADOBE SYSTEMS	N		9/1/2021	CPC		1	\$2,035.00						
32	N00	Departmer	N00			ADOPTIONCO* NATIONAL	N		9/1/2021	CPC		1	\$700.00						

Activate Windows
Go to Settings to activate Windows

PCH721 CREDIT CARD REPORT

ENTER SCRUBBED LINES 1 & 2 OF THE SUMMARY STATEMENT

Governor's Office of Small, Minority & Women Business Affairs
FY 2023 Small Business Reserve Quarterly Summary Statement
 July 1, 2022-

(Only Enter Data in Boxes Marked "link to support." "#VALUE!" Boxes are Autopopulated)

1. Total Credit Card Payments	link to support
2. Total Credit Card Payments to SBR Contractors	link to support
3. Total Procurement Payments (not including Credit Card Payments)	link to support
4. Total Dollars Paid to SBR Contractors Under a Designated SBR Procurement	link to support
5. Total Dollars Paid to SBR Contractors Under a Non-Designated Procurement	link to support
6. Total Number of SBR Contractors receiving award and payments	link to support
7. Total DESIGNATED SBR Procurement Payments (Lines 2 and 4)	#VALUE!
8. Total SBR Procurement Payments (Lines 2, 4 and 5)	#VALUE!
9. Total Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Payments to All Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Payments to All Payments (Line 8/Line 9)	#VALUE!

Agency Name: _____

Agency Head Signature: **agency head signature is not required on quarterly reports at this time**

SBR QUARTERLY REPORT AND SUMMARY STATEMENT

Lines 7 - 11: **Do not** enter data on these lines. They are auto populated from data entered in lines 1, 2, 3, 4, and 5.

The screenshot shows an Excel spreadsheet with the following content:

File Home Insert Page Layout Formulas Data Review View Help

Clipboard Font Alignment Number Styles Cells

July 1, 2022-

Governor's Office of Small, Minority & Women Business Affairs
FY 2023 Small Business Reserve Quarterly Summary Statement
 July 1, 2022-

(Only Enter Data in Boxes Marked "link to support." "#VALUE!" Boxes are Autopopulated)

1. Total Credit Card Payments	link to support
2. Total Credit Card Payments to SBR Contractors	link to support
3. Total Procurement Payments (not including Credit Card Payments)	link to support
4. Total Dollars Paid to SBR Contractors Under a Designated SBR Procurement	link to support
5. Total Dollars Paid to SBR Contractors Under a Non-Designated Procurement	link to support
6. Total Number of SBR Contractors receiving award and payments	link to support
7. Total DESIGNATED SBR Procurement Payments (Lines 2 and 4)	#VALUE!
8. Total SBR Procurement Payments (Lines 2, 4 and 5)	#VALUE!
9. Total Procurement Payments (Lines 1 and Line 3)	#VALUE!
10. Percentage All SBR Designated Payments to All Payments (Line 7/Line 9)	#VALUE!
11. Percentage All SBR Payments to All Payments (Line 8/Line 9)	#VALUE!

Agency Name: _____

Agency Head Signature: agency head signature is not required on quarterly reports at this time

P-CARD LINE1 | P-CARD-SBR-LINE2 | 067-SCRUBBED-LINE 3 | 067-SBR LINE 4-5 | 067-RAWDATA | Line6- T factor ...

SBR QUARTERLY AND ANNUAL REPORT

Non-FMIS Agencies The 11 university campuses and all other non-FMIS units must submit system-generated reports from their respective financial systems, along with any other system documentation that supports the expenditures being reported.

All backup documentation must be submitted electronically in Excel format. If the View Direct hard-copy credit card reports are used, they should be scanned and submitted as an email attachment. Notations of any adjustments made to the report totals should be made directly on the reports. One very visible way is to **highlight** your data in various colors to indicate changes. In the excel example that is in this toolkit, yellow indicates items excluded and **blue** indicates added back in. It is a personal choice but one we find very easy to follow in reviewing your supporting documentation.

Contact us

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SBR Compliance Manager

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410-697-9613 (O)
410-508-8089 (M)

Contact us

Tanita Johnson

SBR Compliance Manager

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COMBINED LIAISON TRAINING

Minority Business Enterprise (MBE) Program

February 9, 2023

AGENDA

- 1. MBE Reporting Requirements**
- 2. Data Scrubbing**
- 3. Report Preparation**
- 4. Data Accuracy**
- 5. *New Cheat Sheet***
- 6. Compliance Assessment Report**
- 7. Announcements and Reminders**



The background features a collage of financial data visualizations. On the left, there are several overlapping, semi-transparent red and orange curved shapes. The main area is filled with a light gray background containing faint, semi-transparent images of various charts: a line graph with multiple colored lines (blue, green, red, yellow) and data points, a pie chart with segments in blue, green, and orange, and a spreadsheet with columns of numbers and a silver pen resting on it. The text 'REPORTING REQUIREMENTS' is centered in a large, bold, black font with a slight drop shadow.

REPORTING REQUIREMENTS

MBE REPORTING REQUIREMENTS

Let's review the reporting requirements for our office:
Found in COMAR 21.11.03.17. *Reporting*

- As we previously discussed our office must receive both Quarterly and Annual MBE Procurement Reports (backup data should be included).
 - Always send to the mbereports.gosba@maryland.gov email box.

MBE REPORTING REQUIREMENTS

Other Reporting Requirements:

Submit to the compliance.gosba@maryland.gov email box

- Waiver Determinations as granted
- Copy our office on the Annual Waiver report to BPW
- MBE Form Amendment Consent/Approval
- We should receive PRG paperwork for solicitations 25 Million and over.

Note:

COMAR 21.11.03.17 C.

Each procurement agency shall furnish any other information or periodic reports requested by the Governor's Office of Small, Minority & Women Business Affairs or the Department of Transportation in connection with MBE certification and procurement, or any other matters related to the administration, effectiveness, or continuation of the Minority Business Enterprise Program.

ANSWERS

MBE Procurement (PCH709-716) ^

PCH709 - BPO/PO Change Orders

PCH710 - Diagnostic by Work Category - Prime

PCH711 - Annual Procurement FORM #1A (Summary)

MBE Payment (PCH717-722) ^

PCH717 - Non-BPO Direct Vouchers

PCH718 - Vouchers & BPO Direct Vouchers

PCH719 - Subcontractors

PCH720 - Subcontractors Projected

PCH721 - R*Stars Voucher Detail

For Quarterly and Annual Reports:

1. Pull Necessary Reports
2. Download to EXCEL

- **Generate the following FMIS/ANSWERS Reports:**

PCHL709 (BPO/PO Change Orders from contracts awarded in prior fiscal years)

PCHL710 (Contract Awards Detail) run by award date

PCHL711 (Contract Awards Summary) Use Waiver Data Only

PCHL717 (Prime Payments by Direct Voucher; no BPO/PO)

PCHL718 (Prime Voucher Payments made from BPO/PO)

PCHL719 (Subcontractor Payments)

PCHL 720 (Subcontract Awards) run by award date

PCHL 721 or VIEWDIRECT A30USB11(P-Card Total/Detail)

REPORTING – 700 AND OTHER DATA REPORTS

IFMIS AND OTHER REPORTING SYSTEMS

- **EXPECTED REPORTS**
 - CHANGE ORDERS (SIMILAR TO ANSWERS 709 REPORT)**
 - AWARDS (PO/BPO) (SIMILAR TO ANSWERS 710 REPORT)**
 - SUBCONTRACTOR AWARDS (SIMILAR TO ANSWERS 720 REPORT)**
 - SUBCONTRACTOR PAYMENTS (SIMILAR TO ANSWERS 719 REPORT)**
 - VOUCHER PAYMENTS (PO/BPO) (SIMILAR TO ANSWERS 718 REPORT)**
 - DIRECT VOUCHERS (SIMILAR TO ANSWERS 717 REPORT)**
 - CREDIT CARD OR CPC REPORT (SIMILAR TO ANSWERS 721 REPORT)**

MBE REPORTING

FMIS CHEAT SHEET

AWARDS = ANSWER reports 709, 710, 717, 720 & 721 OR VIEW DIRECT A30USB11

PAYMENTS = ANSWER reports 717, 718, 719 & 721 OR VIEW DIRECT A30USB11

Reminder: Direct Vouchers and P-card purchases are reported as both AWARDS and PAYMENTS.*

**With the exception of control agency/department statewide contracts*



DATA SCRUBBING

SCRUBBING DATA

Data Reminders:

- Exclusions should be identified either by moving to another tab or by separating and color blocking in the existing spreadsheet
- Add in any necessary data
- Clearly identify data that is included in your report
- Should not include negative numbers
- MBE Classifications must be formatted as required for Contract Inventory and Form 3 submissions
- Data which is only available by PDF should be accompanied by an Excel summary sheet, showing the final exclusions and totals

SCRUBBING DATA

Reviewing data to:

- EXCLUDE NON-REPORTABLE ITEMS such as :
 - GAD List exclusions
 - Preferred Providers
 - Non-profits
 - STATEWIDE CONTRACTS from AWARDS only – *applies to most agencies*
 - NON-DELEGATED CONTRACTS
- INCLUDE
 - Contracts that did not make it on the ANSWERS or other Reports due to late June awards.
 - Any other items that your agency is aware of that need to be added

SCRUBBING AWARD DATA

- Scrub the Prime contract awards:
 - ✓ Change Order Report (709)
 - ✓ Awards PO/BPO (710) / Waivers (711)
 - ✓ Direct Vouchers Report (717)
 - ✓ Credit Card Or CPC Report (721)



SCRUBBING AWARD DATA

Scrub the Subcontractor awards:

✓ Subcontractor Awards (720)

SCRUBBING AWARD DATA

- **Scrub the Prime Payment data:**
 - ✓ Voucher Payments on PO/BPOs (718 report)
 - ✓ Remember to organize data in the Direct Vouchers (717) and the Credit Card or CPC (721) report to identify all payments that will be included in your Form 3 submission, including payments on statewide contracts

SCRUBBING AWARD DATA

Scrub the Subcontractor Payments:

- ✓ Subcontractor Payments (719)



FINAL AWARD PREPERATION

MBE QUARTERLY REPORT

- Use the Quarterly Form 1 / 2 only. Found in the MBE Reporting toolkit, scroll down to see it.
- Pull quarterly report data from ANSWERS or your agency's internal records (iFMIS, Workday, PeopleSoft, etc.)
- No Form 3 Payment Portal entries are required for quarterly reports.
- Same general rules as Annual Report, except you ***include payment data*** broken down by MBE Classification on Form 2 and total agency payments including those to MBEs on Form 1.

FMIS/ANSWERS DATA COLLECTION CHECKLIST

The following checklist will assist you in your efforts to collect and compile all of the data necessary to complete and submit an accurate summary of your agency's procurement activity, including Minority Business Enterprise (MBE) prime contract and subcontract awards and payments:

- Generate the following FMIS/ANSWERS MBE Reports:
 - a) PCHL709 (BPO/PO Change Orders from contracts awarded in prior fiscal years)
 - b) PCHL710 (Contract Awards Detail) run by award date
 - c) PCHL711 (Contract Awards Summary) **Use Waiver Data Only**
 - d) ~~PCHL713 (MBE Prime Contract Awards by Ethnicity)~~-Reference Document Only
 - e) PCHL717 (MBE Prime Payments by Direct Voucher; no BPO/PO)
 - f) PCHL718 (MBE Prime Voucher Payments made from BPO/PO)
 - g) PCHL719 (MBE Subcontractor Payments)
 - h) PCHL 720 (MBE Subcontract Awards) run by award date
 - i) PCHL 721 or VIEWDIRECT A30USB11(P-Card Total/MBE Purchases)

Cut along dotted line and post in visible spot

FMIS CHEAT SHEET

AWARDS = ANSWER reports 709, 710, 717, 720 & 721 OR VIEW DIRECT A30USB11

PAYMENTS = ANSWER reports 717, 718, 719 & 721 OR VIEW DIRECT A30USB11

Reminder: Direct Vouchers and P-card purchases are reported as both AWARDS and PAYMENTS.*

**With the exception of control agency statewide contracts*

- III. **DGS Contracts:** Regarding AWARDS, *agency/department-specific* commodities and maintenance contracts awarded by or through the Agency/Department of General Services (DGS) should be included on the *agency/department's* annual report on Forms 1 and 2.
- a. Non-delegated DGS contracts (i.e., Statewide, Capital Construction, etc.) should be excluded from Forms 1 and 2, as DGS will report these awards.
 - b. Regarding EXPENDITURES, all MBE expenditures **from DGS statewide contracts and delegated contracts** should be included on the using agency/department's Form #3 Payments/Subcontractor Utilization Database

DGS Procurements	Form #1 & 2 - Awards	FORM #3 - Payments
DGS Agency/Agency/Department Specific	Agency/Agency/Department Reports	Agency/Agency/Department Reports
DGS Non-delegated	DGS Reports	Agency/Agency/Department Reports

- c. **DoIT/DBM Master Contracts:** Certain Agency/Department of Budget and Management (DBM) and Agency/Department of Information Technology (DoIT) master contracts have been *DELEGATED* to the using agency/department for purposes of MBE compliance and reporting. All task order **awards** made from these delegated contracts should be reported on Forms 1 and 2 by the using agency/department. **Payments** made to task order contractors (MBE prime and MBE subcontractor) during FY 2019 are to be reported by the using agency/department on Form #3.

For *NON-DELEGATED* DoIT/DBM Statewide contracts, agencies should report only expenditures to MBEs in the Form #3 Payments/Subcontractor Utilization Database. (See the DBM website <http://dbm.maryland.gov/proc-contracts/Pages/MBEDelegation.aspx> (BE SURE TO REVIEW THIS LINK) and the DOIT Master Contracts (on the GOSBA website) for the most current list of contracts for which MBE responsibility has been delegated.)

DoIT/DBM Procurements	Form #1 & 2 - Awards	FORM #3 - Payments
Delegated	Agency/Agency/Department Reports	Agency/Agency/Department Reports
DGS Non-delegated	DGS Reports	Agency/Agency/Department Reports

Governor's Office of Small, Minority & Women Business Affairs

FORM 2 QUARTERLY

Minority Business Enterprise Quarterly/Monthly Procurement Report
 Reporting Department/Agency: _____ Reporting Form #2
 Fiscal Year 2020 Reporting Period: July 1, 2019 - insert date (cumulative to date)

Engineering	Total Dollars															\$0
	# of Contract															0
Construction	Total Dollars															\$0
	# of Contract															0
Construction Related Services	Total Dollars															\$0
	# of Contract															0
Maintenance	Total Dollars															\$0
	# of Contract															0
Services	Total Dollars															\$0
	# of Contract															0
Supplies & Equipment	Total Dollars															\$0
	# of Contract															0
IT Services	Total Dollars															\$0
	# of Contract															0
IT Supplies & Equipment	Total Dollars															\$0
	# of Contract															0
Human, Cultural, Social & Educational Services	Total Dollars															\$0
	# of Contract															0
Totals	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0	
	# of Contract	0	0	0	0	0	0	0	0	0	0			0	0	

Total MBE Subcontract Payments

African American	Asian	Hispanic	Native American	Women	African American Women	Asian Women	Hispanic Women	Native American Women	Disabled	Non-Profit (Certified)	Community Service Provider	Disadvantaged	Total
													\$0.00

Governor's Office of Small, Minority & Women Business Affairs






FORM 1 QUARTERLY

Procurement Category	Total # All Prime Contracts (Including MBE)	Total All Prime Contracts Dollar Value Awarded (Including MBE)	Total # of Prime Contract Waivers	Total Dollar Value of Prime Contract Waivers	Total # MBE Prime Contracts Awarded	Total MBE Prime Contract Dollar Value Awarded	Total # MBE Subcontract s Awarded	Total MBE Subcontract Dollar Value Awarded	Total # of MBE Contracts Awarded-	Total # of MBE Contracts Awarded- Prime & Sub	Total MBE Participation Percentage
Architectural	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
Engineering	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
Construction	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
Construction Related Services	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
Maintenance	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
Services	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
Supplies & Equipment	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
IT Services	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
IT Supplies & Equipment	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
Human, Cultural, Social & Educational Services	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
Corporate Credit Card	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
Direct Voucher	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%
Totals	0	\$0	0	\$0	0	\$0	0	\$0	0	0	0.00%

Total Contract Payments				
Total \$ Paid - All Prime Contracts	Total \$ Paid - MBE Prime & MBE Subcontracts	% MBE Payments	MBE Prime Contracts \$ Paid	MBE Subcontracts \$ Paid
\$0	\$0	0.00%	\$0	\$0

Governor's Office of Small, Minority & Women Business Affairs

COMPILING YOUR DATA

Name	Date modified	Type	Size
 Form 3 Data Template OFFICE OF SCRUBBING	1/25/2023 4:59 PM	Microsoft Excel W...	168 KB
 FY22 BACKUP DATA For OFFICE OF SCRUBBING	1/25/2023 5:00 PM	Microsoft Excel W...	58 KB
 FY22 MBE CONTRACTS INVENTORY OFFICE OF SCRUBBING	1/25/2023 5:00 PM	Microsoft Excel M...	145 KB
 FY2022 AnnualReportForms-rev6-2022 OFFICE OF SCRUBBING	2/6/2023 1:53 PM	Microsoft Excel 97...	116 KB
 FY2022 MBE Summary Statement OFFICE OF SCRUBBING	1/25/2023 5:01 PM	Microsoft Edge PD...	1,021 KB

- Once you have completed the scrubbing of your data, you will consolidate and save your data reports with a name that describes the dataset, your agency/department, and the FY, as discussed earlier.
- You will enter data into the correct cells of the fields in the Form 1 / 2, Form 3, Contracts Inventory, and Summary Statement
- Perform Checks and Balances to ensure your data is accurate

- This part of the process will include the preparation of the :
 - ✓ Form 1 / 2 Annual Report
 - ✓ Contracts Inventory Sheet
 - ✓ Summary Report
 - ✓ Line 1 – All MBE Contract Awards (MBE Prime & Sub)
 - ✓ Line 3 – All Prime Contract Awards (All agency awards)
 - ✓ Line 4 – MBE Participation Percentage

AWARD REPORTS

- This part of the process will include the preparation of the :
 - ✓ Form 3 Payment Portal
 - ✓ Manual entry and deletion method OR
 - ✓ Import Method (Form 3 Data Template)
 - ✓ Summary Report
 - ✓ Lines 2A – Subcontractor payment data
 - ✓ Lines 2B – Prime contractor data (minus non-minorities)

PAYMENT REPORTS



ENSURING DATA ACCURACY

CHECKS AND BALANCES

- Based on FINAL scrubbed backup data reports which include or identify data that was used to produce the values entered in the Annual Form 1 / 2, Form 3, Contract Inventory Sheet, and Summary Statement.
- **AWARDS - ANSWERS REPORTERS – ALL PRIME CONTRACTS DATA**
 - ✓ Form 1 tab (YELLOW area only should be consistent with the contracts on scrubbed 709 / 710, 717, and 721 reports **MINUS** Statewide Contracts.
 - ✓ Specifically, Form 1 fields B (#) and C (\$) 11-20 = 709 / 710 reports
 - ✓ Form 1 fields B (#) and C (\$) 21 = 721 report
 - ✓ Form 1 fields B (#) and C (\$) 22 – 717 report
 - ✓ While this may seem elementary to some, we often find reports with these totals mismatched because of clerical errors and changes so remember to check at the conclusion of your report preparation before submitting.

CHECKS AND BALANCES

- Based on FINAL scrubbed backup data reports which include or identify data that was used to produce the values entered in the Annual Form 1 / 2, Form 3, Contract Inventory Sheet, and Summary Statement.
- **AWARDS - ANSWERS REPORTERS – MBE PRIME CONTRACTOR DATA**
 - ✓ Form 2 tab - Primes table, should be consistent with the Contract Inventory – Primes tab **AND** the reportable MBE totals on your 709 / 710, 717, and 721 reports **MINUS** Statewide Contracts
 - ✓ Specifically, Form 2 summary data for MBE Primes on Form 1, fields F (#) and G (\$) 11-20 = 709 / 710 reports (MBE data only)
 - ✓ Form 1 fields F (#) and G (\$) 21 = 721 report, MBE data only
 - ✓ Form 1 fields F (#) and G (\$) 22 – 717 report, MBE data only

CHECKS AND BALANCES

- Based on FINAL scrubbed backup data reports which include or identify data that was used to produce the values entered in the Annual Form 1 / 2, Form 3, Contract Inventory Sheet, and Summary Statement.
- **AWARDS - ANSWERS REPORTERS – MBE SUBCONTRACTOR DATA**
 - ✓ Form 2 – Subs table, should be consistent with the Contract Inventory – Subs tab **AND** the reportable contracts on your scrubbed 720 report.
 - ✓ Specifically, Form 2 summary data for MBE Subcontractors on Form 1, fields H (#) and I (\$) 11-20 = 720 report

CHECKS AND BALANCES

✓ CAVEATS:

- If you have an MBE Prime with MBE Subcontractors, you will need to take in consideration the amount self-performed and **whether you choose to split the contract award between the Prime and MBE Subs or report the full total under the Prime.**
- Consider contractors who were subject to the 60% percent rule.

CHECKS AND BALANCES

- **PAYMENTS - ANSWERS REPORTERS**

- ✓ Form 3 Prime contractor data should be consistent with MBE reportable payment amounts on the scrubbed 718, 717, and 721 reports.
 - ✓ Keep in mind that non-minority contractor data should only be added if it matches MBE subcontractors.
- ✓ Form 3 Subcontractor data should be consistent with the MBE payments on your 719 report.
- ✓ Form 2 – Subs table, should be consistent with the Contract Inventory – Subs tab **AND** the reportable contracts on your scrubbed 720 report.

CHECKS AND BALANCES

- **SUMMARY STATEMENT**

- ✓ Line 1 = Form 1, cell K23

- ✓ Line 2 is automatically calculated from 2a and 2b

- 2a = Form 3 Subcontractor payments

- 2b = Form 3 Prime Contractor payments **MINUS** payments to non-minorities

- ✓ Line 3 = Form 1, cell C23

- ✓ Line 4 = MBE Participation percentage in Form 1, cell L23



REPORT CORRECTIONS

- ✓ Keep in mind that corrections to reports, whether MBE, SBR, or VSBE, will be sent back to the parties who submitted the report.
- ✓ To ensure all parties are aware of correction requests, you can cc all parties on the original submission.



MBE REPORTING CHEAT SHEET

REPORTING CHEAT SHEET WILL INCLUDE:

- Each report requirement will have a guide, which will list which backup reports will be required to fill in the specific report as well as general reminders for each report.
 - Form 1 & 2
 - Form 3
 - Contracts Inventory
 - Summary Statement
- Check and Balances include:
 - Reporting Checklist
 - Submission Checklist



FORM 1- TOTAL CONTRACT AWARDS TABLE

Minority Business Enterprise Annual Procurement Report											Reporting Form #1
Reporting Department/Agency:		0									
Fiscal Year 2022		July 1, 2021 - June 30, 2022									
Total Contract Awards by Procurement Categories											
Procurement Category	Total # All Prime Contracts (Including	Total All Prime Contracts Dollar Value Awarded (Including MBE)	Total # of Prime Contract Waivers	Total Dollar Value of Prime Contract Waivers	Total # MBE Prime Contracts Awarded	Total MBE Prime Contract Dollar Value Awarded	Total # MBE Subcontracts Awarded	Total MBE Subcontract Dollar Value Awarded	Total # of MBE Contracts Awarded-	Total \$ of MBE Contracts Awarded- Prime & Sub	Total MBE Participation Percentage
Architectural	0	709/710	0	711	0	\$0	0	\$0	0	\$0	
Engineering	0	709/710	0	711	0	\$0	0	\$0	0	\$0	
Construction	0	709/710	0	711	0	\$0	0	\$0	0	\$0	
Construction Related Services	0	709/710	0	711	0	\$0	0	\$0	0	\$0	
Maintenance	0	709/710	0	711	0	\$0	0	\$0	0	\$0	
Services	0	709/710	0	711	0	\$0	0	\$0	0	\$0	
Supplies & Equipment	0	709/710	0	711	0	\$0	0	\$0	0	\$0	
IT Services	0	709/710	0	711	0	\$0	0	\$0	0	\$0	
IT Supplies & Equipment	0	709/710	0	711	0	\$0	0	\$0	0	\$0	
Human, Cultural, Social & Educational Services	0	709/710	0	711	0	\$0	0	\$0	0	\$0	
Corporate Credit Card	0	721	0	711	0	\$0			0	\$0	0.00%
Direct Voucher		717		711	0	\$0			0	\$0	0.00%
Totals	0	\$0	0	\$0	0	\$0	0	\$0	0	\$0	0.00%

709- Change Orders
710- Contract Awards
711- Waiver Data
717- Direct Vouchers
721- Credit Cards

FORM 2- SUBCONTRACT AWARDS TABLE

Total MBE Subcontract Awards by MBE Classifications and Procurement Categories																					
Procurement Category		African American	Asian	Hispanic	Native American	Women	African American Women	Asian Women	Hispanic Women	Native American Women	Disabled	Non-Profit (Certified)	Community Service Provider	Disadvantaged	Total						
Architectural	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
Engineering	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
Construction	Total Dollars	\$0	\$0	\$0	720-MBE Subcontractor Awards						\$0	\$0	\$0	\$0							
	# of Contracts	0	0	0							0	0	0	0	0	0	0				
Construction Related Services	Total Dollars	\$0	\$0	\$0							\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0
	# of Contracts	0	0	0							0	0	0	0	0	0	0			0	0
Maintenance	Total Dollars	\$0	\$0	\$0							0	0	0	0	0	0	0			\$0	\$0
	# of Contracts	0	0	0							0	0	0	0	0	0	0			0	0
Services	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
Supplies & Equipment	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
IT Services	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
IT Supplies & Equipment	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
Human, Cultural, Social & Educational Services	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						
Totals	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0						
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0						

FORM 2- PRIME CONTRACT AWARDS TABLE

Total MBE Prime Contract Awards by MBE Classifications and Procurement Categories																				
Procurement Category		African American	Asian	Hispanic	Native American	Women	African American Women	Asian Women	Hispanic Women	Native American Women	Disabled	Non-Profit (Certified)	Community Service Provider	Disadvantaged	Total					
Architectural	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0					
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0					
Engineering	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0					
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0					
Construction	Total Dollars	\$0	\$0	\$0	709- MBE Change Orders 710- MBE Prime Contract Awards For Columns 40-59 (Procurement Categories)						\$0	\$0			\$0	\$0				
	# of Contracts	0	0	0							0	0	0	0	0	0			0	0
Construction Related Services	Total Dollars	\$0	\$0	\$0							\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0
	# of Contracts	0	0	0							0	0	0	0	0	0			0	0
Maintenance	Total Dollars	\$0	\$0	\$0							\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0
	# of Contracts	0	0	0	0	0	0	0	0	0			0	0						
Services	Total Dollars	\$0	\$0	\$0		\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0					
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0					
Supplies & Equipment	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0					
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0					
IT Services	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0					
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0					
IT Supplies & Equipment	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0					
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0					
Human, Cultural, Social & Educational Services	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0					
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0					
Corporate Credit Card	Total Dollars	\$0	\$0	\$0	721- MBE Credit Card Transactions						\$0	\$0			\$0	\$0				
	# of Contracts	0	0	0							0	0	0	0	0	0			0	0
Direct Voucher	Total Dollars	\$0	\$0	\$0	717- MBE Direct Voucher Totals						\$0	\$0			\$0	\$0				
	# of Contracts	0	0	0							0	0	0	0	0	0			0	0
Total	Total Dollars	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0	\$0					
	# of Contracts	0	0	0	0	0	0	0	0	0	0			0	0					

CONTRACTS INVENTORY- MBE PRIME CONTRACTORS

Minority Business Enterprise MBE Prime Contract Awards Report For Fiscal Year 2022 Date Submitted:								
(List all MBE prime contracts awarded.)								
#	Agency Name	MBE Prime Contractor Name	Prime Contractor MBE Cert. #	Prime Contractor MBE Classification (Select from Dropdown)	Credit Card / Direct Voucher (Select ONLY from the Dropdown)	Contract Description (Procurement Category) (Select from Dropdown)	Award Amount	Contract # ONLY <small>(Please list the contract #, do NOT include Credit Card or Direct Voucher on this line)</small>
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								

Awards that should be included in the MBE Prime Contractors Tab:

709- Change Orders
710- Contract Awards
717- Direct Vouchers
721- Credit Cards

Reminder:

**Your Contracts Inventory should mirror the totals you entered in your Form 2 Prime Contractors Table.

CONTRACTS INVENTORY- MBE SUB CONTRACTORS

Minority Business Enterprise MBE Subcontract Awards Report

For Fiscal Year 2022

Date submitted:

(List all MBE subcontracts awarded.)

#	Agency Name	MBE Subcontractor Name	Subcontractor MBE Cert. #	Subcontractor MBE Classification (Select from Dropdown)	Agency Prime Contract #	Prime Contract Description (Procurement Category) (Select from Dropdown)	Award Amount
---	-------------	------------------------	---------------------------	---	-------------------------	--	--------------

1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							

Awards that should be included in the MBE Subcontractors Tab:
720- MBE Subcontractor Awards

Reminder:

****Your Contracts Inventory should mirror the totals you entered in your Form 2 MBE Subcontractors Table.**

FORM 3- MBE PRIME CONTRACTOR PAYMENTS

ID	Contractor Name	EFIN	MBE Designation	MDOT_Cert	Contract#	StartDate	EndDate	Award Amount	Payments FY	Payments CTD	MBE Goal Description
A005	M&M, Inc.	00-0000000	Women	01-001	A005	6/28/2018	12/31/2018	\$260,471.00	\$500.00	\$500.00	0% Emergency Installation of Temporary Steam Lin

Payments that should be included in PRIMES TAB:

- MBE Direct Voucher Payments (717)
- MBE Credit Card Payments (721)
- MBE Voucher Payments (718)
- Non-Minority Voucher Payments (718)

Only if the Non-Minority is attached to a MBE Subcontractor

Reminder:

**The ID in Column A is used to attach the correct MBE Subcontractor to their Prime. This ID should match the PRIME ID to the correct subcontractor

Instructions | PRIMES | SUBS | +

FORM 3- MBE SUBCONTRACTOR PAYMENTS

Prime ID	Contractor Name	MDOT Cert#	MBE Designation	Award Amount	Payments FY	Payments CTD
A005	CHARDONNAY INC	00-000	Women	\$9,496,151.73	\$918,054.00	\$1,800,005.00

Payments that should be included in SUBS Tab:
-MBE Subcontractor Payments (719)
Reminder:
Remember that the Prime ID (Column A) must match the Prime ID in the PRIMES Tab to attach the correct Prime to their MBE Subcontractor.

Instructions | PRIMES | SUBS | +

SUMMARY STATEMENT



Governor's Office of
Small, Minority & Women
Business Affairs

Annual Minority Business Enterprise (MBE)
Procurement Report

FY2022 Summary Statement

Reporting Department/Agency:
Fiscal Year: 2022

Category	Amount
1. Total dollars awarded to MBEs (Total from Form 1 Spreadsheet)	FORM 1 COLUMN K23
2. Total dollars paid to MBEs (Total from Form 3 Database, Sum of 2a and 2b below)	0.00
a. Total Actual Subcontractor Payments (Form 3)	FORM 3
b. Total Prime Contractor Actual Payments by (excluding non-minority primes) (Form 3)	FORM 3
3. Total dollars awarded (Total from Form 1 Spreadsheet)	FORM 1 COLUMN C23
4. MBE awards as a percentage of contracts awards (from Form 1 Spreadsheet)	FORM 1 COLUMN L23
Secretary/Agency Head Name:	

This summary is not complete until the three respective signatures on Page 2 have been obtained.

REPORTING CHECKS AND BALANCES

FMIS/ANSWERS Data Collection Checklist

The following checklist will assist you in your efforts to collect and compile all the data necessary to complete and submit an accurate summary of your agency/department's procurement activity, including Minority Business Enterprise (MBE) prime contract and subcontract awards and payments:

- Generate the following FMIS/ANSWERS MBE Reports:
 - a) PCHL709 (BPO/PO Change Orders from contracts awarded in prior fiscal years)
 - b) PCHL710 (Contract Awards Detail) run by award date
 - c) PCHL711 (Contract Awards Summary) **Use Waiver Data Only**
 - d) PCHL713 (MBE Prime Contract Awards by Ethnicity) **Reference Document Only**
 - e) PCHL717 (MBE Prime Payments by Direct Voucher; no BPO/PO)
 - f) PCHL718 (MBE Prime Voucher Payments made from BPO/PO)
 - g) PCHL719 (MBE Subcontractor Payments)
 - h) PCHL 720 (MBE Subcontract Awards) run by award date
 - i) PCHL 721 or VIEWDIRECT A30USB11(P-Card Total/MBE Purchases)

Cut along dotted line and post in visible spot

FMIS CHEAT SHEET

AWARDS = ANSWER reports 709, 710, 717, 720 & 721 OR VIEW DIRECT A30USB11

PAYMENTS = ANSWER reports 717, 718, 719 & 721 OR VIEW DIRECT A30USB11

Reminder: Direct Vouchers and P-card purchases are reported as both AWARDS and PAYMENTS.*

**With the exception of control agency/department statewide contracts*

Forms	Data that is required in each form
Form #1- Contract Awards	The anticipated amount of the base period of the contract when it was first awarded or renewed.
Form #2-MBE Prime & Subcontract Awards	The MBE Prime Contractor's Portion of the Contract & the Subcontractor's MBE commitments when the contract was first awarded or renewed.
Form #3-Actual Payments	The confirmed MBE payment amounts actually paid for services rendered or products purchased.

SUBMISSION CHECKS AND BALANCES

ANNUAL MBE REPORT SUBMISSION CHECKLIST

(For Agency Use)

- Completed Summary Statement, **signed by three representatives**, please plan accordingly (**hard copy mailed with original signature or scanned signed copy e-mailed to GOSBA**)
- Fiscal Year 2019 MBE Strategic Plan (MS Word or PDF file), send to GOSBA due July 31, 2018
- GOSBA Procurement Awards **Annual Reporting Forms 1 and 2** Excel spreadsheets – 1 file. *(please note that the ANNUAL Report excel file is slightly different from the monthly version), send to GOSBA in excel format.*
 - Include Awards Delegated from DGS
 - Include Awards that may not have been posted in timely manner from June BPW Agendas
- GOSBA “MBE CONTRACTS INVENTORY” formerly known as MBE Prime Contractor and MBE Subcontractor Awards Detail Report excel spreadsheets – 1 file, send to GOSBA
- GOSBA Form 3 data entry into web portal
- GOSBA Form 3 Reports to keep on file, you decide, GOSBA has documentation within the portal
- Documentation supporting the annual report awards and payments** submitted to GOSBA. (FMIS using agencies should include **RECONCILED* electronic** copies of the reports used to generate award and payment data and any other relevant supporting documentation. Non-FMIS using agencies should include reports from their systems that validate the figures being reported.) This documentation should be submitted via e-mail, Google Drive or as a last result thumb drive or CD by October 1, 2018. **MANDATORY SUBMISSION**



USE YOUR CHECKLIST

****For FY23, the Compliance Assessment will be added to this list.**



COMPLIANCE ASSESSMENT REPORT

COMPLIANCE ASSESSMENT AVAILABLE NOW

The Compliance Assessment Report is available now, in the January 17, 2023 Compliance Bulletin.

GOVERNOR'S OFFICE OF
Small, Minority & Women Business Affairs

Quick Links

- About Us
- FAQs
- Legislation and Policy
- Outreach
- News
- Reports
- Contact Us

MBE Reporting Toolkit

This toolkit contains valuable information to assist State agencies/departments with the management and compliance of the Minority Business Enterprise (MBE) Program.

[Due Now](#)

MBE Program 2nd Quarter Report
Due January 30, 2023
[Access Template Here](#)
Reporting Period July 1, 2022 - December 31, 2022

FY2022 MBE Annual Report

The MBE Annual Report must be completed and submitted on or before September 30, 2022. The Annual Report covers the period July 1, 2021 - June 30, 2022.

Please submit the following:

1. Form 1 & 2 as EXCEL sheets (1 file) and the signed signature page
2. Contracts Inventory Report as EXCEL sheets (1 file)
3. Data entry in the Form 3 Web Portal (Contact GOSBA for technical assistance)
4. A completed and signed Summary Sheet (all figures must match your form 3 data and your Form 1 & 2)

Procurement Compliance Bulletins

- 1.17.2023**
- 12.14.2022
- 11.17.2022

SBR PROGRAM REPORTING TOOLKIT

VSBE PROGRAM REPORTING TOOLKIT

Resource Links

- eMaryland Marketplace Advantage (eMMA)
- MBE Prime Regulation 2014
- Liquidated Damages Guidelines
- Liquidated Damages Worksheet
- Liquidated Damages Hourly Rate Calculations
- GAD List Exclusion Definitions
- Board of Public Works Advisories
- Directory of Certified MBEs
- FMIS Bulletin Board System (BBS) Log In Page
- DBM Master Contracts
- DGS Master Contracts
- DoIT Master Contracts
- DoIT Customer Service Desk
(For FMIS/ADPICS information, online training and assistance in obtaining user name and password as needed.)

MBE COMPLIANCE ASSESSMENT REPORT

- Will report information about contracts that closed (expired) during the fiscal year and contained MBE goals/subgoals.
- Will include an excel report with a prime and subs tab and a Compliance Report tab which will be printed off and signed by your agency head or designee.
- Aggregate results will be published in the Governor's Office of Small, Minority & Women Business Affairs Annual Report.



Maryland

GOVERNOR'S OFFICE
OF SMALL, MINORITY & WOMEN
BUSINESS AFFAIRS

FINAL ANNOUNCEMENTS & REMINDERS

STAY CONNECTED

- Are you maximizing your agency's Small Business Reserve (SBR), Minority Business Enterprise (MBE) and Veteran-Owned Small Business Enterprise (VSBE) participation?
- Do you know who on your team is responsible for compliance and administration of the SBR, MBE and VSBE Programs and if they are receiving this Procurement Compliance Bulletin?
- Do you attend our training regularly?

Governor's Office of Small, Minority & Women Business Affairs

STAY CONNECTED

- Are you participating in our Compliance Conference Call?
- Are you attending the monthly Senior Procurement Advisory Group (SPAG) monthly meetings?

Note: If no one at your agency is receiving SPAG meeting invitations, email Jamie Tomaszewski, Chief Administrative Officer, Office of State Procurement (OSP), Maryland Department of General Services (DGS), at jamie.tomaszewski@maryland.gov and ask to be added to the invite list.



Maryland

GOVERNOR'S OFFICE
OF SMALL, MINORITY & WOMEN
BUSINESS AFFAIRS

**AS ALWAYS, IF YOU HAVE QUESTIONS AFTER TODAY'S TRAINING,
PLEASE CONTACT US:**

NICHELE JOHNSON

NICHELLE.JOHNSON1@MARYLAND.GOV

410-697-9605

667-232-1369

KAREN REYES

KAREN.REYES@MARYLAND.GOV

410-697-9608

443-346-0630

Governor's Office of Small, Minority & Women Business Affairs



COMBINED LIAISON TRAINING

VSBE Reporting Training

February 9, 2023

VSBE PROGRAM OVERVIEW



VSBE Program Statutes

STATE FINANCE AND PROCUREMENT ARTICLES § 14-601—14-606

<https://mgaleg.maryland.gov/mgaweb/Laws/StatuteText?article=gsf§ion=14-601&enactments=false>

VSBE Participation

- § 14-601. Definitions
- § 14-602. Procurement procedures
- § 14-603. Awarding of contract
- § 14-604. Regulations, procedures and report
- § 14-604.1. Advisory Committee
- § 14-605. Prohibited acts and Penalties
- § 14-606. Penalties Amendment



VSBE Program Regulations

COMAR 21.11.14 UPDATED

<https://dsd.maryland.gov/regulations/Pages/21.11.14.01.aspx>

VSBE Policies

- 01 General — Purpose
- 02 Definitions
- 03 Scope
- 04 Procurement Agency Responsibility
- 05 VSBE Liaison
- 06 Reporting
- 07 Procurement Solicitations
- 08 Contract Award
- 09 Waiver
- 10 Amendment of VSBE Participation Schedule
- 11 Compliance
- 12 Verification



VSBE PROGRAM OVERVIEW



VSBE Program

- Provides contracting opportunities on state-funded procurements for certified **veteran-owned small businesses**
- Only the work of a **certified VSBE firm**, performing either directly (prime contractors) or indirectly (subcontractors), can be counted toward the achievement of an established contract goal
- As of February 1, 2023, there are over 610 active and certified VSBE vendors in the eMMA database and growing daily.



**VSBE
CERTIFICATIONS
AND EMMA**



EMMA

eMaryland Marketplace Advantage (eMMA) is the only platform to verify vendors in the VSBE Program

Welcome to eMaryland Marketplace Advantage (eMMA)



eMMA is Maryland's new online procurement platform used to connect the vendor community with contracting opportunities from state, county, and local government entities. Registered vendors will receive notices of bid opportunities, can submit bid responses online, and may obtain bid results online.

Qualified vendors may also complete the self-certification process for the Small Business Reserve (**SBR**) Program and Veteran-owned Small Business Enterprise (**VSBE**) Program.

eMMA facilitates an open, transparent, and efficient procurement process. We look forward to doing business with you!

Additional information can be found in the [Frequently Asked Questions](#) and [Quick Reference Guides](#). Any questions please contact the eMMA Help Desk at eMMA.helpdesk@maryland.gov.

LOGIN

Login*

Login must have a value

Password*

Login

State SSO Login(SecureAuth)

MDoT SSO Login(MSAzure)

[Lost your password?](#)



[New Vendor? Register Now](#)



[Public Solicitations](#)



[Public Contracts](#)



[Vendor Search](#)

VSBE INTERNAL DATABASE

The screenshot shows the VSBE Internal Database interface. At the top, there is a navigation bar with a back arrow, a refresh icon, and the text "Browse Vendors". On the right side of the navigation bar is a search box labeled "Search" with a magnifying glass icon. Below the navigation bar, there are three input fields: "Keywords", "Alerts", and "Commodities". To the right of these fields are checkboxes for "My Commodities" and "Q Search", and a "Reset" button. Below the search fields, there are filter options: "Filters Level: Entity x VSBE Vendor: ✓ x". In the middle of the interface, there are buttons for "0 Selected", "Generate RFI", "Merge Vendors", and "Create a Vendor". The main part of the interface is a table with 14 columns: Code, Company Name, Legal Name, Parent Company, Web site, ERP Vendor ID, Mail Code, Status, SBR Certification #, SBR Expiration Date, VSBE Certification #, VSBE Expiration Date, AP Invoice Email, and AP Invoice Phone. The table contains 16 rows of vendor data. At the bottom left, there is a pagination bar with numbers 1 through 7 and a total of 614. At the bottom right, there is a gear icon for settings, which is circled in red.

	Code	Company Name	Legal Name	Parent Company	Web site	ERP Vendor ID	Mail Code	Status	SBR Certification #	SBR Expiration Date	VSBE Certification #	VSBE Expiration Date	AP Invoice Email	AP Invoice Phone
<input type="checkbox"/>	☆ SUP994386	1 Alpha Consulting LLC	1 Alpha Consulting LLC		www.1alphaconsulting.com			Registered	SB22-028109	10/31/2023	VB22-028112	10/31/2023	tom@1alphaconsulting.com	7172811190
<input type="checkbox"/>	☆ SUP1001811	10+1 LLC	10+1 LLC		https://tenplus1.com/			Registered	SB23-031880	1/9/2024	VB23-031879	1/9/2024	contact@tenplus1.com	3018612184
<input type="checkbox"/>	☆ SUP783556	1351 Investigations LLC	1351 Investigations LLC					Registered	SB21-015593	6/26/2023	VB22-022505	6/1/2023	1351investigationllc@gmail.com	4439945066
<input type="checkbox"/>	☆ SUP790859	2250 Financial Services, Inc.	2250 Financial Services, Inc.		www.2250financial.com			Registered	SB22-026515	10/6/2023	VB22-017545	11/17/2023	johnolson@2250financial.com	4107746723
<input type="checkbox"/>	☆ SUP005990	2-CM Technologies, LLC	2-CM Technologies, LLC		www.2cmtechnologies.com			Registered			VB22-021726	4/19/2023	cduncan@2cmtechnologies.com	4105307563
<input type="checkbox"/>	☆ SUP025253	3rd Aspect	3rd Aspect		3RD Aspect			Registered			VB22-021905	4/27/2023	paul.m.sivacek@3rdaspect.com	3348067420
<input type="checkbox"/>	☆ SUP026138	4th Revolution Technologies	4th Revolution Technologies, L.L.C.					Registered	SB22-025651	9/26/2023	VB22-025649	9/26/2023		2028780240
<input type="checkbox"/>	☆ SUP845399	916 Confections, LLC	916 Confections, LLC					Registered			VB22-020912	3/8/2023		6673207156
<input type="checkbox"/>	☆ SUP027729	A&C Pack and Ship	A&C Pack and Ship		www.acpackandship.com			Registered		12/6/2022	VB22-017675	12/7/2023	info@acpackandship.com	6679303114
<input type="checkbox"/>	☆ SUP790593	A&M Smoked Meats, llc	A&M Smoked Meat, llc		www.amsmoked.com			Registered	SB22-030420	12/12/2023	VB22-028879	11/14/2023	a.brown@amsmoked.com	4108147521
<input type="checkbox"/>	☆ SUP021470	A. Malone Design LLC	A. Malone Design LLC		www.amalonedesign.com			Registered	SB22-021634	4/12/2023	VB22-021633	4/20/2023	antone@amalonedesign.com	4438523126
<input type="checkbox"/>	☆ SUP783641	A.V. Metrics, LLC	A.V. Metrics, LLC		www.avmetrics.net			Registered			VB22-022562	7/1/2023	allison.macdonald@avmetrics.net	8054215056
<input type="checkbox"/>	☆ SUP999780	A6 Group LLC	A6 Group LLC		N/A			Registered	SB22-030829	12/15/2023	VB22-030828	12/15/2023	Support@TheA6Group.com	5042511783
<input type="checkbox"/>	☆ SUP804342	AARON WINDLE	AARON WINDLE			1212195888_000	000	Active	SB22-025221	9/19/2023	VB22-025218	9/19/2023	dartceo@gmail.com	2027252454
<input type="checkbox"/>	☆ SUP020216	ABSOLUTE SECURITY GROUP INC	Absolute Security Group, Inc.		www.absolutesecuritygroup.com	1522034269_000	000	Active	SB21-015462	6/17/2023	VB22-022548	6/17/2023		



CERTIFIED VSBE VENDORS

- It is the responsibility of the agency/department to make sure all VSBE's on all FY2023 contracts are certified in the VSBE Database in eMMA
- Failure to do , will result in your agency having to manually extract that data from your FY2023 reports, as no awards or payments can be counted toward VSBE contract goals by veteran firms not in the VSBE Program

VSBE CERTIFICATION

Internal


Apply for the VSBE Program? <input type="radio"/> Yes	Existing VSBE Vendor? <input type="text" value="No"/>	VSBE Effective Date <input type="text" value="10/31/2022"/>	VSBE Certification # <input type="text" value="VB22-028112"/>	VSBE Expiration Date <input type="text" value="10/31/2023"/>
<input checked="" type="checkbox"/> VSBE Vendor	VSBE Application Status <i>i</i> <input type="text" value="Approved"/>	Veteran Verification # <input type="text" value="MDVA2022-167"/>		

External




Code	Company Name	Legal Name	Parent Company	Web site	ERP Vendor ID	Mail Code	Status	SBR Certification #	SBR Expiration Date	VSBE Certification #	VSBE Expiration Date	P Invoice Email	AP Invoice Phone
							Registered	SB22-028109	10/31/202	VB22-028112	10/31/2023		7172811190

VSBE CERTIFICATION REPORT EXAMPLE

Contract Amou	Doc Stat	Multi Vend	Vendor Numb	Vendor Name	Fiscal Effective Da	Effective Da	Expiration Da	Award Da	VET Flag
	POST	N	****179457	DVORAK LLC	5/11/2022	5/11/2022	5/10/2024	5/11/2022	Y




[Vendors](#)
[Sourcing](#)
[Contracts](#)
[Catalogs](#)
[Analytics](#)
[Admin](#)

 Accessibility
 
 Danielle D.

< ↺

Vendor Search

Search 

Keywords

Company Name

Country

VSBE Vendor

Commodities

eMMA Vendor ID

State

SBR Vendor

Areas Served



Levels related with the supplier:

Q Search

Reset

Filters

Country: UNITED STATES x
Levels related with the supplier: Group Entity
Company Name: DVORAK LLC x

eMMA Vendor ID	Company Name	City	State	Postal Code	Vendor Contact	SBR Vendor	SBR Certification #	SBR Expiration Date	VSBE Vendor	VSBE Certification #	VSBE Expiration Date	Website	AP Invoice Email
SUP003880	DVORAK LLC	BALTIMORE	MD	21222	Patty Arn	<input type="checkbox"/>			<input checked="" type="checkbox"/>	VB22-017722	12/23/2023	www.dvorakllc.com	parnn@dvorakllc.com



FEDERAL VETERAN SEARCH

<https://veterans.certify.sba.gov/#home>

The screenshot shows the homepage of the Federal Veteran Search application. At the top right, there is a navigation menu with links for Home, Veteran Small Business Search, Eligibility, Benefits, and Support. On the left side, the SBA logo is displayed above the text 'U.S. Small Business Administration'. The main heading is 'Veteran Small Business Certification (VetCert)'. Below this, a paragraph explains that veteran-owned small businesses can use the application to be certified by SBA to compete for federal contracts. Two buttons, 'Register' and 'Sign In', are located below the paragraph. At the bottom, there is a search section titled 'Search for a Certified Veteran Small Business'. This section includes a dropdown menu for 'Search By DUNS Number' with options for Business Name, SAM.gov UEI, DUNS Number, State/Territory, and NAICS Code. A search input field is labeled 'Search Veteran Certifications'. The text 'Certification Eligibility' is visible at the bottom right of the page.



U.S. Small Business Administration

Veteran Small Business Certification (VetCert)

Veteran-owned small businesses can use this application to be certified by SBA to compete for federal contracts. Certified veteran-owned businesses (VOSBs) will have the opportunity to pursue sole-source and set-aside contracts at the Department of Veterans Affairs and Vets First program. Certified service-disabled veteran-owned small businesses (SDVOSBs) will have the opportunity to compete for set-aside and set-aside contracts across the federal government.

[Register](#) [Sign In](#)

Search for a Certified Veteran Small Business

Search By DUNS Number

Search Veteran Certifications

- Business Name
- SAM.gov UEI
- DUNS Number
- State/Territory
- NAICS Code

Certification Eligibility

VSBE PROGRAM REPORTING



VSBE TOOLKIT

[HTTPS://GOMDSMALLBIZ.MARYLAND.GOV/PAGES/REPORTING-TOOL-VSBE.ASPX](https://gomdsmallbiz.maryland.gov/pages/reporting-tool-vsbe.aspx)

GOVERNOR'S OFFICE OF Small, Minority & Women Business Affairs

Quick Links

- About Us
- FAQs
- Legislation and Policy
- Outreach
- News
- Reports
- Contact Us

VSBE Reporting Toolkit

This toolkit contains valuable information to assist State agencies/departments with the management and compliance of the Veteran-Owned Small Business Enterprise (VSBE) Program.

eMaryland Marketplace Advantage (eMMA) is the only platform to verify vendors in the VSBE Program.

New Source For Federal Veteran Certification Searching

The federal Vets First CVE Verification Program known as VetBiz is no longer in operation. Responsibility for verifying the veteran status of small business owners at the federal level has been transferred to the U.S. Small Business Administration and is now called Veteran Small Business Certification (VetCert). Effective immediately, the new site to search for federally certified veteran-owned small businesses is now <https://veterans.certify.sba.gov/#home>. The state's Department of Veteran Affairs continues to perform veteran verifications for Maryland businesses through the eMMA platform.

FY2022 VSBE Annual Report

The VSBE Annual Report must be completed and submitted on or before October 1, 2022. The Annual Report covers the period July 1, 2021 - June 30, 2022.

Submit the latest VSBE Utilization Data Template by the due date.

This report is mandatory and must be submitted to: vsboreports.gosba@maryland.gov

VSBE Report Instructions and Template:

- FY2022 VSBE REPORTING MANUAL.docx
- VSBE Annual Report Template FY22.xlsx
- GAD List

Procurement Compliance Bulletins

- 1.17.2023
- 12.14.2022
- 11.17.2022
- 10.20.2022

Liaison Training

VSBE, MBE and SBR Combined Liaison Training Slide Deck
October 4, 2022

SBR PROGRAM REPORTING TOOLKIT

MBE PROGRAM REPORTING TOOLKIT

VSBE PROGRAM REPORTING TOOLKIT

Resource Links

- eMaryland Marketplace Advantage
- FY2018 Report on VSBE Participation

Veteran-Owned Small Business Enterprise (VSBE) Annual Report

Fiscal Year 2022

Beginning in Fiscal Year 2019, the work of firms verified by the Center For Veterans Enterprise of the United States Department of Veterans Affairs or the Maryland Department of Veterans Affairs may be counted toward a defined VSBE contract goal (see COMAR 21.11.14).

INSTRUCTIONS: Complete all yellow cells. Automatic calculations will appear in blue cells. Do not edit this template.

Agency Reporting:
 Individual Completing Report:

➔ **Awards to VSBEs**

	Total # All Procurement Contracts Awarded	Total \$ All Procurement Contracts Awarded	Total # Contracts Awarded to VSBEs as Prime Contractors	Total \$ Contracts Awarded to VSBEs as Prime Contractors	Total # VSBE Subcontracts Awarded	Total \$ VSBE Subcontracts Awarded	Percentage of VSBE Participation
Procurement Contracts							
Corporate Credit Card							
Direct Voucher							
Total		\$0		\$0		\$0	

➔ **Payments to VSBEs**

Total \$ Payments to All Prime Contractors (Total of ALL Payments)	Total \$ Payments to VSBEs as Prime and Subcontractors	VSBE Payments as % of All Payments

To avoid double counting, for contracts awarded to VSBEs as prime contractors, report only the VSBE prime contract award, award amount, and payments above; do not report the VSBE subcontractor awards and payments on these contracts.


Notes:

VSBE ANNUAL REPORT TEMPLATE



ANSWERS REPORTING

Home Help



DEPARTMENT OF INFORMATION TECHNOLOGY
ANSWERS FINANCIAL REPORTING

Sign In

For registered users you can enter your Sign In credentials below.
If you have already linked your account, you can use the connect.md.gov to the right.

Email

The email field is required.

Password

Forgot your password?

Use another service to Sign In

New to ANSWERS?

<https://net.md.gov/apps/Answers/>

REPORTS

Contracts Management (PCH355)

Commodities on PO/Contract
(A315DB2)


Procurement Award Dollars
(PCH062)


SBR Expenditure Detail/Summary
(PCH065/067)

SBR Procurement (PCH068)

BPO Detail

MBE Procurement
(PCH709-716) 

MBE Payment
(PCH717-722) 

YEC
(PCH210,212-213) 

ANSWERS News and Updates

1/31/2023

NOTICE: ANSWERS Data is refreshed/loaded each weekend from ADPICS.

6/17/2022

We have introduced a new feature to let you know when the data for each report was last generated. As well as a table below the Run Report Button, here is a list:

Weekly - Prior Saturday:

- PCH355
- PCH062
- PCH065/067
- PCH068
- PCH709-713
- PCH717-722
- PAAR
- PCH210
- PCH212-213

Daily - Close of Prior Business Day:


- DAFR6000
- DB2T100
- DB2T200
- DB2VenPmtHist
- DB2AgyBudget
- DB2G230
- DB2Invs
- DB2R9760
- DB2SpecFund
- FSP6162R (G230)
- FSPT130
- FSPINVSR

Real Time:

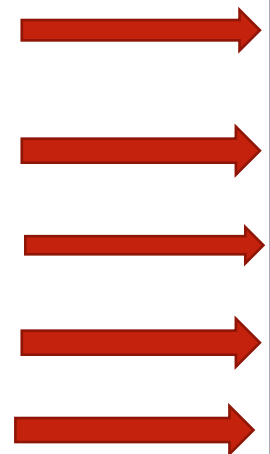
- A315DB2
- BPO Detail
- DB2VehDisp
- DB2VNameSrch
- DB2MDOTVenPmtHis
- DB2R6320
- DB2R9060
- DB2R9070

ANSWERS HOMESCREEN

VSBE ANSWERS REPORTS DATA



MBE Procurement (PCH709-716) ^
PCH709 - BPO/PO Change Orders
PCH710 - Diagnostic by Work Category - Prime
PCH711 - Annual Procurement FORM #1A (Summary)
PCH712 - Annual MBE Procurement FORM #1B
PCH713 - Contracts by Classification



MBE Payment (PCH717-722) ^
PCH717 - Non-BPO Direct Vouchers
PCH718 - Vouchers & BPO Direct Vouchers
PCH719 - Subcontractors
PCH720 - Subcontractors Projected
PCH721 - R*Stars Voucher Detail
PCH722 - Contract Compliance To Date Summary Report

Awards
709, 710, 720

Awards & Payments
Please note the 717 & 721
are used for **both** awards and payments

Payments
718, 719

HOW TO RUN VSBE ANSWER REPORTS

Step 1- Find your Agency/Department

Step 2- Make sure the Begin/End Dates are correct **AND** the Date Type is Fiscal Effective Date.

For FY23 Dates will be July 1, 2022- June 30, 2023

Step 3- Make sure Report Type is set to VET, if applicable

Step 4- Run Report

The screenshot shows the VSBE Answer Reports interface. A red box highlights the search bar labeled "Search Agencies...". Below it, a list of agencies is shown with checkboxes: "All Agencies", "Statewide DBM (050)", "Statewide DGS (001)", "Statewide Doit (060)", and "600 - Capital Projects- Office of Comptroller (600)".

The "Begin Date" is set to 07/01/2021 and the "End Date" is set to 06/30/2022. Red arrows point to these date fields. To the right of the end date are buttons for "+30", "+60", and "+90" (Calculated from Begin Date).

The "Date Presets" section includes buttons for PPFY, PFY, CFY, FYTD, PPY, PY, CY, PM, CM, and YTD. The "Date Type" is set to "Fiscal Effective Date" (radio button selected).

The "Report Type" is set to "VET" (dropdown menu highlighted with a red circle).

At the bottom, there is a "Clear All Selections" button and a "Run Report" button (highlighted with a red circle).

* Report Data is updated weekly and current as of 2/4/2022

HOW TO RUN VSBE ANSWERS REPORT

PCH710 - Diagnostic by Work Category - Prime - VET

EFFECTIVE DATES 07/01/2021 - 06/30/2022



Agency	Agency Name	Total Count	Total Amount
▶ [REDACTED]	[REDACTED]	108	\$48,441,297.36
	Totals	108	\$48,441,297.36

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

Step 5- Pull report into Excel spreadsheet

(This is your RAW data)

Step 6- Create a separate tab in the same Excel workbook with the same data and **scrub**, by sorting data using the Vet Flag column, reportable, etc.

Step 7- Be sure to label, total, and/or pivot table to utilize the data for the Annual Report

NO VET FLAG REPORTS PCH 709 & PCH 721

709- There is no Vet Flag to filter or sort this contract data right now. This is a manual review and highly recommended for agencies/departments to document internally.

Departme	Agency	Agency T	Contract N	Contract Effective	Category	Proc M	Vendor No	Vendor Name	MBE Type	MBE Desc	CO No	CO Effective	Original Contract Amount	CO Amount
----------	--------	----------	------------	--------------------	----------	--------	-----------	-------------	----------	----------	-------	--------------	--------------------------	-----------

721- Although there is no Vet Flag to select on the initial run on this report, Column Q does pull the Vet Flag data to then be sorted/filtered.

Depart	Depart	Batc	MBE_T	MBE_D	Vendor	Vendor_Name	MBE_Certificatio	MBE_E	Effective_Da	Cur_Do	Cur_Do	Numbe	Payme	Reporta	Reporta	Vet_Fla
--------	--------	------	-------	-------	--------	-------------	------------------	-------	--------------	--------	--------	-------	-------	---------	---------	---------

VSBE ANSWERS REPORTING CONCLUSION

Generate the following FMIS/ANSWERS VSBE Reports

1. PCHL 709 (PO/BPO Change Orders from contracts awarded in prior fiscal years), no Vet flag
2. PCHL 710 (Contract Awards Detail) with Vet Flag
3. PCHL 717 (MBE/VSBE Prime Payments by Direct Voucher; no BPO/PO) with Vet Flag
4. PCHL 718 (MBE/VSBE Prime Voucher Payments made from BPO/PO) with Vet Flag
5. PCHL 719 (MBE/VSBE Subcontractor Payments) with Vet Flag
6. PCHL 720 (MBE/VSBE Subcontractor Awards) run by award dates with Vet Flag
7. PCHL 721 or Internal Agency/Department (MBE/VSBE Credit Card/P-Card Purchases) no Vet Flag, but has Vet column on report

VSBE ANSWERS CHEAT SHEET-ANSWERS

Veteran-Owned Small Business Enterprise (VSBE) Annual Report

CHEAT SHEET

Beginning in Fiscal Year 2019, the work of firms verified by the Center For Veterans Enterprise of the United States Department of Veterans Affairs or the Maryland Department of Veterans Affairs may be counted toward a defined VSBE contract goal (see COMAR 21.11.13).

INSTRUCTIONS: Complete all yellow cells. Automatic calculations will appear in blue cells. Do not edit this template.

Agency Reporting:

Individual Completing Report:

Awards to VSBEs

	Total # All Procurement Contracts Awarded	Total \$ All Procurement Contracts Awarded	Total # Contracts Awarded to VSBEs as Prime Contractors	Total \$ Contracts Awarded to VSBEs as Prime Contractors	Total # VSBE Subcontracts Awarded	Total \$ VSBE Subcontracts Awarded	Percentage of VSBE Participation
Procurement Contracts	QTY	709 & 710 Rpts Combined Total	QTY	VSBE 710	QTY	VSBE 720 Rpt	#VALUE!
Corporate Credit Card	QTY	721 &/or Internal Report	QTY	VSBE 721/Credit Cards			#VALUE!
Direct Voucher	QTY	717 Data	QTY	VSBE 717			#VALUE!
Total							

Should match MBE Rpt total agency awards

Payments to VSBEs

	Total \$ Payments to All Prime Contractors (Total of ALL Payments)	Total \$ Payments to VSBEs as Prime and Subcontractors	VSBE Payments as % of All Payments
	717 + 718 + Credit Card Report (721 or Internal) = All totals	VSBE only 717 + VSBE only 718 + VSBE only 719 + Credit Card Rpt (721 or Internal) = VSBE Total Payments	#VALUE!



NON-ANSWERS REPORTING

VSBE NON-ANSWERS REPORTS DATA

Awards

- BPO/PO Change Orders
- All Contracts Awards Detail (Prime) with VSBE awards
- All Subcontract Awards Detail with VSBE awards

Payments

- All Voucher & BPO Voucher payments with VSBE Vendors
- All Subcontractor payments with VSBE's

Awards & Payments

Please note Direct Vouchers & Credit Cards/
P-Cards are used for **both** awards and
payments

NON-ANSWERS REPORTING TIPS

- Only submit your agency/department information
- Report Data is clearly labeled, with VSBE data identified
- If there is no data for a particular category, please make sure to indicate that. It can be on the excel spreadsheet or in the comments column on the Annual Report.
- Payments are specific to prime and/or subcontractors
- Awards and supporting backup data supports fiscal year dates
- Reportable amounts totals should match the amounts on the Annual Report
- Please do not use one report for all program

NON-ANSWERS REPORTING CONCLUSION

Generate the following VSBE Reports:

1. PO/BPO Change Orders from contracts awarded in prior fiscal years
2. All Contract Awards Detail with VSBE awards
3. All Prime Payments by Direct Voucher; no BPO/PO with VSBE payments
4. All Prime Voucher Payments made from BPO/PO with VSBE payments
5. All Subcontractor Payments with VSBE payments
6. All Subcontractor Awards with VSBE awards
7. All Internal Agency/Department Credit Card/P-Card Purchases with VSBE Payments

VSBE ANSWERS CHEAT SHEET

NON-ANSWERS

For publication to the Governor, the Legislative Policy Committee, and the public.

Veteran-Owned Small Business Enterprise (VSBE) Annual Report

CHEAT SHEET

Beginning in Fiscal Year 2019, the work of firms verified by the Center For Veterans Enterprise of the United States Department of Veterans Affairs or the Maryland Department of Veterans Affairs may be counted toward a defined VSBE contract goal (see COMAR 21.11.13).

INSTRUCTIONS: Complete all yellow cells. Automatic calculations will appear in blue cells. Do not edit this template.

Agency Reporting:

Individual Completing Report:

Awards to VSBEs

	Total # All Procurement Contracts Awarded	Total \$ All Procurement Contracts Awarded	Total # Contracts Awarded to VSBEs as Prime Contractors	Total \$ Contracts Awarded to VSBEs as Prime Contractors	Total # VSBE Subcontracts Awarded	Total \$ VSBE Subcontracts Awarded	Percentage of VSBE Participation
Procurement Contracts	QTY	All BPO/PO Contract Awards & Change Orders	QTY	VSBE Prime Awards	QTY	VSBE Subcontract Awards	#VALUE!
Corporate Credit Card	QTY	All Credit Cards or P-Cards	QTY	VSBE Credit Cards/P-Cards			#VALUE!
Direct Voucher	QTY	All Direct Vouchers (no BPO/PO)	QTY	VSBE Direct Vouchers (no BPO/PO)			#VALUE!
Total							

Should match MBE Rpt total agency awards

Payments to VSBEs

	Total \$ Payments to All Prime Contractors (Total of ALL Payments)	Total \$ Payments to VSBEs as Prime and Subcontractors	VSBE Payments as % of All Payments
	All Direct Vouchers + All Voucher Payments + All Credit Cards/P-Cards =Total Payments	VSBE only Direct Vouchers + VSBE only Voucher Payments + VSBE only Subcontractor Payments + VSBE only Credit Cards/P-Cards Payments = VSBE Total Payments	#VALUE!

VSBE REPORTING FY23 CHECKLIST

BY OCTOBER 1ST DEADLINE

 VSBE Annual Report

 VSBE Outreach Report

 Consolidated Backup Data-

- Raw data
- Scrubbed data
- VSBE specific awards totals
- VSBE specific payment totals



NEW VSBE REPORTING REQUIREMENTS STARTING FY2023

21.11.14.06 Reporting

(2) The number of waivers granted pursuant to Regulation .09 of this chapter;

(3) An evaluation by the procurement agency of the success of its VSBE Program, which shall include a brief description of the procurement agency outreach efforts to VSBE prime and VSBE subcontractors.

VSBE FY23 WAIVERS

VSBE Forms (Attachment E) were updated effective September 1, 2022. Modifications included Waiver Guidance (E-1C) with definitions, Good Faith Efforts outlined, and other valuable information.

<https://procurement.maryland.gov/wp-content/uploads/sites/12/2018/04/AttachmentE-VSBEForms.pdf>

Announced in November 2022 SPAG, there is now MBE & VSBE Waiver Goal Guidance. All VSBE Waivers Determinations are required to be emailed to vsbe.gosba@maryland.gov

https://procurement.maryland.gov/wp-content/uploads/sites/12/2022/11/BP-MBE_VSBE-Waiver-Guidance-v1-10.17.2022.pdf

Veteran-Owned Small Business Enterprise (VSBE) Program Outreach Form

Fiscal Year 2023

Starting for fiscal year 2023, every participating agency must report their VSBE Program outreach to veteran businesses and overall program evaluation.
(see COMAR 21.11.14).

INSTRUCTIONS: Complete all yellow highlighted cells. Do not edit this template.

Agency Reporting:

Individual Completing Form/Title:
Number of Employees Engaged in
VSBE Outreach:

What channels do you engage for
your VSBE Outreach?

Please check all that apply:

Live/In-Person

Virtual

One on One

Print

Social Media Platforms

Other

Number of outreach events (live or virtual) targeting VSBE's hosted by your Agency/Department?

--

Number of outreach events (live or virtual) targeting VSBE's attended (not hosted) by your Agency/Department?

--

Number of Total VSBE outreach events

--

Does your Agency/Department have a defined outreach strategy for engaging veteran-owned small businesses?

Yes or No?

--

Does your Agency/Department VSBE Liaison or designee attend pre-bid meetings on solicitations that include VSBE goals?

Yes or No?

--

If Yes to the preceding question, how many during this fiscal year?

--

What factors of your outreach efforts contributed to your overall VSBE Program performance?

--

Add any other information relevant to your veteran-owned small business outreach efforts:

--

Thank YOU!

