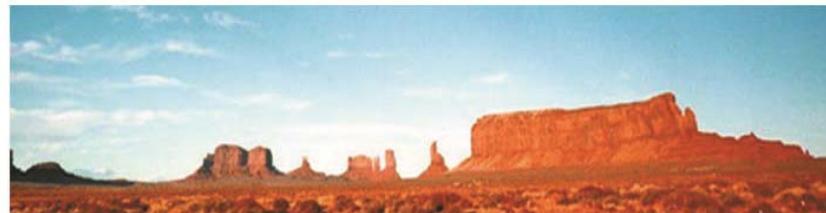




# Staff User Manual

## Chapter 6 – Certifications



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<b>Chapter 6. Certifications .....</b>	<b>6-1</b>
Viewing vendor certifications .....	6-1
<b>    Understanding the certification tracking process .....</b>	<b>6-4</b>
Adding certifications .....	6-4
Processing certifications .....	6-5
Completing the action steps .....	6-6
Adding documents and questions .....	6-8
Completing the certification process .....	6-10
Working with Business Information Data Input .....	6-11
<b>    Managing certifications .....</b>	<b>6-15</b>
Sending certification letters .....	6-15
Viewing sent notifications .....	6-17
Sample certification letters .....	6-18
Editing certifications .....	6-20
Expiring certifications and renewals .....	6-21
Recertifying/Renewing certifications .....	6-24



# Chapter 6 – Certifications

Every organization has varying processes for certifying or recognizing qualified firms. Some organizations maintain comprehensive certification programs, while others recognize certifications of an independent certifying agency. Regardless of how your vendors are certified, a record of their certification can be made available in the B2Gnow system.

There are three ways to enter certifications:

1. Downloaded from a separate directory. This is an automated process, providing updates on a scheduled basis. B2Gnow manages this process for you.
2. User created and processed in detail using B2Gnow.
3. User created as a simplified tracking record for contract/concession reference purposes.

If your organization certifies vendors, the module will be configured to your process. When you select a certification type, action, and company type, the system automatically generates a certification template for you to follow. This streamlines the certification process and ensures correct information is collected and reviewed.

## Viewing vendor certifications

### To view a vendor's certifications

1. Search for the vendor.
2. From the search results list, click the **Certs** hyperlink for the vendor you want to view.

**Search: Vendors**

[Users](#) | [Vendors](#) | [Contracts](#) | [Concessions](#) | [Outreach](#)

Help & Tools 

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

To resort, click on column title.

Business Name	Phone Number	Location	Actions
All <input type="button" value="▼"/>			
B2Gnow Test 6	602-325-9277	Phoenix, AZ	20051275 <a href="#">Edit</a> <a href="#">QuickView</a> <a href="#">Contracts</a> <a href="#">Concessions</a> <a href="#">Certs</a>

The Vendor Profile: Certifications tab lists the status of all certifications for the past ten years. Click **View** to see a detailed record of a certification.

**Vendor Profile: Certifications**

Business Name: B2GNow Test Vendor 4

[Main](#) | [General Info](#) | [Public Profile](#) | [Users](#) | [Commodity Codes](#) | [Contacts & Owners](#) | [Employees](#) | [Comments](#) | [Reviews](#) | [Certifications](#) | [Contracts](#) | [Concessions](#) | [Site Visits](#) | [Applications](#)

[New Record](#)

**Current Certifications**

Type	Action	Effective	Renewal	Expiration	Organization	Reviewer	Actions
DBE	New	9/10/2012	9/30/2013	9/30/2015	City of Houston	Houston Admin1	<a href="#">View</a> <a href="#">Edit</a>

[Change Request List](#)

**Pending/In Process Certifications**

Type	Action	Application Date	Organization	Reviewer	Actions
MBE	New	9/11/2012	City of Houston	Houston Admin1	<a href="#">Process</a>

The certification record lists the vendor and certification information.

**Vendor Information**

Business Name	B2GNow Test Vendor 4
System Vendor Number	20018259
Primary Owner's Name	Sandy Shephard
Company Type	Corporation
Ethnic Group	Hispanic
Gender	Female

**Certification Information**

Current Status	Approved; Published to Directory
Certifying Agency	City of Houston
Certification Type	DBE - Disadvantaged Business Enterprise
Certification Action	New
Certification Number	01000010
Certification Date	9/10/2012
Renewal Date	9/30/2013
Expiration Date	9/30/2015
Renewal/Expiration Setting	Manual. This certification will remain listed on the active directory after the renewal date is reached.
Certifying Agent	Houston Admin1, City of Houston

**Contact Information**

Main Company Email	srm@b2gnow.com
Main Phone	602-325-9277
Main Fax	602-325-9277
Internet/Web Page	

**Addresses**

Physical Address	5025 N Central Ave., #494 Phoenix, AZ 85012
Mailing Address	5025 N Central Ave., #494 Phoenix, AZ 85012

Business Capabilities		
Business certified for	All kinds of things.	
Full Description of Capabilities/Products		
NAICS Codes	No Codes Assigned	
Owner Ethnicity and Gender		
Ethnic Group	Hispanic	
Gender	Female	
DBE Ethnic Group		
State Ethnic Group		
Business Information		
Federal Tax ID Number		
Primary Owner's Social Security Number		
Gross Receipts		
Date Established		
Date Incorporated		
Number of Employees		
State Certification	N/A	
Principal place of business in the State?	N/A	
US Citizen	Yes	
Location and Work Districts/Regions		
County		
Statewide Work Area	N/A	
Work Districts/Regions		
Certification Timeline - Phase 1 - Preliminary Tasks		
Action	Date	User
Record Creation Date	9/11/2012 12:37 CDT	
Submission/Application Date	9/11/2012 12:37 CDT	Houston Admin7
Date Received	9/11/2012 12:37 CDT	Houston Admin7
Date To Supervisor	9/11/2012 12:37 CDT	Houston Admin7
Date Assigned to Staff	9/11/2012 12:38 CDT	Houston Admin7
Date of Document Screening	9/11/2012 12:51 CDT	Houston Admin7
Date OK To Proceed	9/11/2012 12:52 CDT	Houston Admin7
Certification Timeline - Phase 2 - Audits		
Action	Date	User
Date of Desk Audit	9/11/2012 13:42 CDT	Houston Admin7
Date of Financial Audit	9/11/2012 13:44 CDT	Houston Admin7
Date of Field Audit	9/11/2012 13:43 CDT	Houston Admin7
Certification Timeline - Phase 3 - Approval and Review		
Action	Date	User
Date To Committee/Board	9/11/2012 13:45 CDT	Houston Admin7
Date of Final Decision	9/11/2012 13:45 CDT	Houston Admin7
Date of Approval	9/11/2012 13:45 CDT	Houston Admin7
Date of Data Input	9/11/2012 13:50 CDT	Houston Admin7
Date of Directory Publication	9/11/2012 13:50 CDT	Houston Admin7
Certification Timeline - Alternate Actions		
No actions recorded.		
Certification Timeline - Communications		
No communication actions recorded for this certification record.		
Letters Sent		
No letters sent for this certification record.		
Comments		
No comments found for this certification.		
Other Information		
Council District		
Category	Technology & Telecommunications	
License/Certificate		
Graduation Standard		
Comments		

## Understanding the certification tracking process

The B2Gnow Certification Module tracks certifications from application submission to approval. The system tracks each step of the review process and beyond, including renewal, delisting/decertification, and graduation.

Use the Vendor Search to locate the vendors you need to certify. If they do not exist in the system you need to add a new vendor (Refer to Chapter 2: Vendor Management). To reduce the possibility of creating duplicate vendor records, perform a thorough search before adding vendors to the system.

### Adding certifications

After locating the vendor or creating a vendor record, you can add a certification to the vendor record.

#### To add a certification

1. Search for and locate the vendor, and then in the **Action** column, click **Certs**.
2. Click **New Record**.

**Certification: Start** Help & Tools 

Start | B2Gnow Test 6  
Phoenix, AZ

Select the appropriate settings for the new certification record and click the **Submit** button.

**\* required entry**

Certification Parameters	
<b>Certification Type &amp; Action *</b> (Select action for each type needed)	New - Record(s) will be created from scratch using default settings.  - Select - ACDBE - Airport Concessionaire Disadvantaged Business Enterprise - Select - MBE - Minority Business Enterprise - Select - SBE - Small Business Enterprise - Select - WBE - Women Business Enterprise - Select - DBE - Disadvantaged Business Enterprise - Select - PDBE - Persons with Disabilities Business Enterprise
<b>Company Type *</b>	<input checked="" type="radio"/> Corporation <input type="radio"/> LLC <input type="radio"/> LLP <input type="radio"/> Partnership <input type="radio"/> Joint Venture <input type="radio"/> Sole Proprietorship <input type="radio"/> Limited Joint Venture <input type="radio"/> Franchise

**Create Certification(s)** **Cancel**

3. Select the certification type and action and the company type.
4. Click **Create Certification(s)**.

---

**NOTE:** To save time, current vendor information is added to the certification record. When recertifying or renewing certifications, the existing data is copied to the new record.

---

## Processing certifications

The certification record contains all supporting documents, audit information, letters, communications, and comments. After adding the certification, you need to complete the tasks in the certification process. You can view a checklist of items to be completed and their current status in the process from the Certification: Main Summary page. Use the checklist to manage the milestones in your certification review process. Each action may contain a sub-list of tasks, such as documents that need to be marked as received and validated or questions that must be answered before each action can be marked as complete.

To complete certification tasks, use the buttons on the Main Summary page or use the tabs to navigate to the appropriate section. When you finish with a section, mark it as complete before proceeding to the next task.

### To access the certification

1. Search for and locate the vendor for which you want to process a certificate, and then click the **Certs** hyperlink.
2. Click the **Process** hyperlink for the certification you want to update.

Pending/In Process Certifications					
Type	Action	Application Date	Organization	Reviewer	Actions
SBE	New	9/13/2012	City of Houston		<a href="#">Process</a>
MBE	New	9/11/2012	City of Houston	Houston Admin1	<a href="#">Process</a>

The Certification: Main Summary page displays. Before you can process steps for the certification, it is important to assign a certifying officer.

### To assign a certification officer

1. From the **Certification Officer** list, select a name.

Certification Information	
Certification Type	SBE - Small Business Enterprise ( <a href="#">change type</a> )
Certification Action	New ( <a href="#">change action</a> )
Current Status	Pending Document Screening
Certification Officer	<input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px;" type="button" value="Houston Admin8"/> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">         None assigned          Houston Admin1          Houston Admin2          Houston Admin5          Houston Admin6          Houston Admin7          Houston Admin8       </div>
Phase 1 - Preliminary Tasks	
Category	Status
Screening of Supporting Documents	Pending - 7 to be received (out of 7)
OK To Proceed	<input style="width: 100px; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 5px; margin-right: 10px;" type="button" value="Process"/> <span style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px;">Pending</span>

2. Click **OK**.

**NOTE:** When working with a large team, you can run a Vendor search to find all certifications assigned to a specific certifying officer.

Next, you can complete the tasks in the action steps.

## Completing the action steps

Before a certification can be approved and published to the directory, a series of actions must be completed. Use the checklist to track and complete the tasks for the certification.

On the Certification: Main Summary page, you can use the Process buttons to access a list of associated tasks for each item in the checklist. To add or update information in additional sections, use the tabs to navigate to the appropriate area, and then complete the tasks.

**Certification: Main Summary**

**Help & Tools**

**Main** [Alternate Actions](#) [Comments](#) [Communications](#) [Timeline](#) [Data Input](#) [Owners](#) [Site Visits](#) [Misc](#) [Reports](#) [Cert List](#)

B2GNow Test Vendor 4  
Phoenix, AZ  
DBE New

Status: **Approved; Published to Directory**

Certification Officer: **Houston Admin8**  
Certification: **9/10/2012**  
Renewal: **9/30/2013**  
Expiration: **9/30/2015**

This is the main summary page for the certification. Click any link or button to access related functions.

**Certification Information**

Certification Type	DBE - Disadvantaged Business Enterprise ( <a href="#">change type</a> )
Certification Action	New ( <a href="#">change action</a> )
Current Status	<b>Approved; Published to Directory</b>
Certification Officer	Houston Admin1

**Phase 1 - Preliminary Tasks**

Category	Actions	Status
Screening of Supporting Documents	<a href="#">Process</a>	Complete (Houston Admin7) - All received, all validated
OK To Proceed	<a href="#">Process</a>	Complete (Houston Admin7)

**Phase 2 - Audits**

Category	Actions	Status
Desk Audit	<a href="#">Process</a>	Complete (Houston Admin7) - All answered
Financial Audit	<a href="#">Process</a>	Complete (Houston Admin7) - All answered
Field Audit	<a href="#">Process</a>	Complete (Houston Admin7) - None required

**Phase 3 - Approval and Review**

Category	Actions	Status
To Committee/Board	<a href="#">Process</a>	Complete (Houston Admin7)
Final Decision	<a href="#">Process</a>	Complete: Approved (Houston Admin7)
Data Input	<a href="#">Process</a>	Complete (Houston Admin7)
Publish to Directory	<a href="#">Process</a>	Complete (Houston Admin7)

**Main** tab: Displays a summary of the certification record, the record's current status, and a checklist of the milestones that need to be completed for the certification.

**Alternate Actions** tab: Displays a checklist to help manage special certification circumstances.

**Comments** tab: Displays comments added by staff and lets you add comments.

**Communications** tab: Displays a list of notifications you can send to the vendor and any notifications already sent.

**Timeline** tab: Displays a history of all actions taken for the certification.

**Data Input** tab: Displays and lets you update information about the vendor and vendor certificate, such as the vendor's contact information and the certificate renewal and expiration dates.

**Owners** tab: Displays a list of owner's associated with the vendor and lets you add owners.

**Site Visits** tab: Displays a list of site visits that have taken place for the vendor and lets you add site visit information.

**Misc** tab: Displays a list of licenses associated with the vendor and lets you add licenses.

**Reports** tab: Displays a list of reports you can run.

**Cert List** tab: Click to display a list of the vendor's certificates.

B2Gnow configured each task list to meet your organization's certification requirements. Task lists are dynamically generated based upon the certification, action, and company type. For example, the supporting documents list for an SBE recertification/renewal includes mandatory and required documents.

Mandatory Documents			
Document	Received	Validated	Actions
certification_request.doc ( <a href="#">Edit Name</a> , <a href="#">Delete</a> )	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a>
Signed and notarized Affidavit of Certification	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a>
Signed and notarized Affidavit of Non-Interest for each owner	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a>
Customer references, including contact name and phone number, for whom work has been performed.	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a>
Firm's signed tax returns (gross receipts) plus all related schedules for past three years and any other firms that you own.	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a>
Invoices and proof of payment for services provided in the area(s) in which you seek certification	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a>
Work experience resumes for all owners, officers and anyone listed in the application.	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a>
Official Certificate of Incorporation	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a>
<a href="#">» Add More Documents</a>			

**Mark required documents as:**  
 Received: [REMAINING DOCS](#) [ALL DOCS](#)  
 NOT received: [REMAINING DOCS](#) [ALL DOCS](#)  
 NOT applicable: [REMAINING DOCS](#) [ALL DOCS](#)

**Mark required documents as:**  
 Validated: [REMAINING DOCS](#) [ALL DOCS](#)  
 NOT validated: [REMAINING DOCS](#) [ALL DOCS](#)

Required Documents			
Document	Received	Validated	Actions
another_cert_request.doc ( <a href="#">Edit Name</a> , <a href="#">Delete</a> )	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a> <a href="#">Not Applicable</a>
All relevant licenses, license renewal forms, permits, and haul authority forms	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a> <a href="#">Not Applicable</a>
Certification of Authority of do Business in Texas (for out-of-state businesses)	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a> <a href="#">Not Applicable</a>
For Trucking Company: List of U.S. DOT numbers for each truck owned or operated by your firm	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a> <a href="#">Not Applicable</a>
<a href="#">» Add More Documents</a>			

When all of the actions have been completed, the certification can be approved and published to the Directory.

## Adding documents and questions

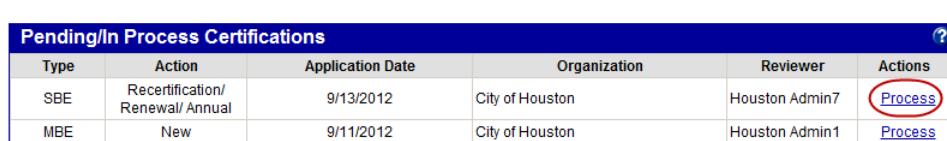
If needed, you can add documents or questions to your existing lists. If you want the new item to appear on every template, contact Customer Support for assistance. You can also add documents and questions to an existing certification record on an ad-hoc basis.

### To add a document

1. Search for and locate the vendor for which you want to add a document, and then click the **Certs** hyperlink.
2. Click the **Edit** hyperlink or **Process** hyperlink.

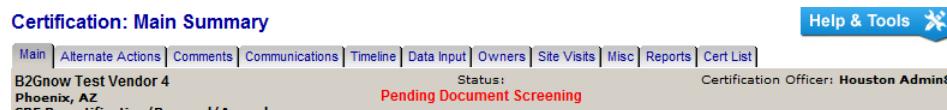


Current Certifications							
Type	Action	Effective	Renewal	Expiration	Organization	Reviewer	Actions
DBE	New	9/10/2012	9/30/2013	9/30/2015	City of Houston	Houston Admin1	<a href="#">View</a> <a href="#">Edit</a>

Type	Action	Application Date	Organization	Reviewer	Actions
SBE	Recertification/ Renewal/ Annual	9/13/2012	City of Houston	Houston Admin7	<a href="#">Process</a>
MBE	New	9/11/2012	City of Houston	Houston Admin1	<a href="#">Process</a>

3. In the **Screening of Supporting Documents** area, click the **Process** button.



Phase 1 - Preliminary Tasks		
Category	Actions	Status
Screening of Supporting Documents	<a href="#">Process</a>	Pending - None required
OK To Proceed	<a href="#">Process</a>	Pending

4. In the **Mandatory Documents** area or **Required Documents** area, click **Add More Documents**, depending on whether the document you are adding is mandatory for the certification or required.

Mandatory Documents			
Document	Received	Validated	Actions
Signed and notarized Affidavit of Certification	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a>
Signed and notarized Affidavit of Non-Interest for each owner	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a>
Customer references, including contact name and phone number, for whom work has been performed.	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a>
Firm's signed tax returns (gross receipts) plus all related schedules for past three years and any other firms that you own.	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a>
Invoices and proof of payment for services provided in the area(s) in which you seek certification	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a>
Work experience resumes for all owners, officers and anyone listed in the application.	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a>
Official Certificate of Incorporation	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a>
<a href="#">Add More Documents</a>			

Required Documents			
Document	Received	Validated	Actions
All relevant licenses, license renewal forms, permits, and haul authority forms	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a> <a href="#">Not Applicable</a>
Certification of Authority of do Business in Texas (for out-of-state businesses)	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a> <a href="#">Not Applicable</a>
For Trucking Company: List of U.S. DOT numbers for each truck owned or operated by your firm	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a> <a href="#">Not Applicable</a>
<a href="#">Add More Documents</a>			

5. In the **Document Name** field, enter the title and description of the document, as you want it to display in the Document list.  
 6. To make the document mandatory for the certification process, select **Mandatory**.

Required Documents			
Document	Received	Validated	Actions
All relevant licenses, license renewal forms, permits, and haul authority forms	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a> <a href="#">Not Applicable</a>
Certification of Authority of do Business in Texas (for out-of-state businesses)	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a> <a href="#">Not Applicable</a>
For Trucking Company: List of U.S. DOT numbers for each truck owned or operated by your firm	-	-	<a href="#">Receive</a> <a href="#">Not Received</a> <a href="#">Receive &amp; Validate</a> <a href="#">Not Applicable</a>
<a href="#">Add More Documents</a>			
Enter up to 10 additional documents and click <b>Save Documents</b> . Indicate if each document is mandatory (check the box) or required based upon the circumstances of the firm (leave unchecked).			
Document Name	Mandatory	Document Name	Mandatory
11	<input type="checkbox"/>	16	<input type="checkbox"/>
12	<input type="checkbox"/>	17	<input type="checkbox"/>
13	<input type="checkbox"/>	18	<input type="checkbox"/>
14	<input type="checkbox"/>	19	<input type="checkbox"/>
15	<input type="checkbox"/>	20	<input type="checkbox"/>
<a href="#">Save Documents</a>			

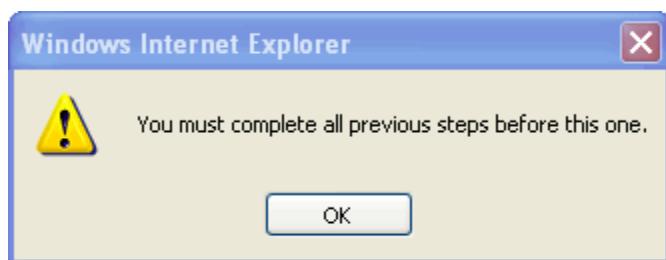
7. Click **Review**, and then click **OK**.

## Completing the certification process

When you complete a stage fully or partially, the action status is updated.

Phase 1 - Preliminary Tasks		
Category	Actions	Status
Screening of Supporting Documents	Process	Complete (Houston Admin7) - All received, all validated
OK To Proceed	Process	Complete (Houston Admin7)

In general, the system does not allow you to skip a step in the Certification Process. Each action must be completed in the order listed, with the exception of grouped audit steps which can be completed in any order, but must all be completed before moving on to the next step. The following message displays if you attempt to skip an Action in the checklist.



The system records the date and the name of the most recent user who completed each process. You can view these details on the Timeline tab.

**Certification: View Timeline**

Main | Alternate Actions | Comments | Communications | **Timeline** | Data Input | Owners | Site Visits | Misc | Reports | Cert List | Help & Tools

B2Gnow Test Vendor 4  
Phoenix, AZ  
SBE Recertification/Renewal/Annual

Status: Pending Document Screening

Certification Officer: Houston Admin8

[Edit Timeline](#)

**Phase 1 - Preliminary Tasks**

Action	Date	Edit	User
Record Creation Date	9/13/2012 12:57 CDT	<a href="#">Edit</a>	
Submission/Application Date	9/13/2012 12:57 CDT	<a href="#">Edit</a>	Houston Admin7
Date Received	9/13/2012 12:57 CDT	<a href="#">Edit</a>	Houston Admin7
Date To Supervisor	9/13/2012 12:57 CDT	<a href="#">Edit</a>	Houston Admin7
Date Assigned to Staff	9/13/2012 13:07 CDT	<a href="#">Edit</a>	Houston Admin7

An "Admin" user indicates someone from B2Gnow support completed the task, per a staff member's request.

## Working with Business Information Data Input

You can complete the Business Information Data as information becomes available. The Business Information must be completed before publishing the certification to the Directory, and you can complete it simultaneously while processing the certification actions.

**Certification: Data Input Compose**

[Main](#) | [Alternate Actions](#) | [Comments](#) | [Communications](#) | [Timeline](#) | [Data Input](#) | [Owners](#) | [Site Visits](#) | [Misc](#) | [Reports](#) | [Cert List](#)

B2Gnow Test Vendor 4  
Phoenix, AZ  
SBE Recertification/Renewal/Annual

Status: Pending Document Screening

Certification Officer: Houston Admin8

Enter all relevant information from the application. Click Review to continue.

[Copy Data](#)

**\* required entry**

**Vendor Information**

Business Name	B2Gnow Test Vendor 4
System Vendor Number	20018259
Certification Type	SBE - Small Business Enterprise
Application Date	9/13/2012 12:57:16 PM

**Certification Information**

Enter details related to this particular certification.	
Certification Number	<input type="text"/>
Certification Date	<input type="text"/> (mm/dd/yyyy)
Next Renewal Date	<input checked="" type="radio"/> 9/30/2013 (mm/dd/yyyy) <input type="radio"/> 1 <input type="button"/> year(s) <input type="button"/>
Expiration Date	<input checked="" type="radio"/> 9/30/2015 (mm/dd/yyyy) <input type="radio"/> 3 <input type="button"/> year(s) <input type="button"/>
Renewal/Expiration Setting	<input type="radio"/> Automatic. This certification will automatically be removed from the active directory if it is not renewed/recertified by the renewal date. <input checked="" type="radio"/> Manual. This certification will remain listed on the active directory after the renewal date is reached.

**Certification Number:** a number or number sequence that your organization sets. This may be based on the type of certification or location of the certifying firm.

**Certification Date:** the date the actual certification will become active. This may be the same as the approval date.

**Next Renewal Date and Expiration Date:** indicate when action must be taken before the Certification expires. Although certification may be valid for several years, it may be necessary for the firm to renew annually. In many cases, the renewal and expiration dates are the same.

**Renewal/Expiration Setting:** the setting for the listing in the active directory. The Automatic setting removes the listing from the directory when the vendor's certification expires. The Manual setting allows the listing to remain on the active directory after it expires.

**Additional Vendor Information, Business/Physical Address, and Mailing Address:** for new certification records, these fields are copied from the most recent certification record or the vendor record.

**Additional Vendor Information**

Review the vendor's information, and make changes if necessary.

Business Name *	B2GNow Test Vendor 1		
DRA Name			
Primary Owner's Name	Salutation	First Name	Last Name
		Sandy	Shep
Suffix			
Main Company Email	srm@b2gnow.com		
Main Phone	602	325-9277	Ext.
Main Fax	602	325-9277	
Internet Web Page			

**Business/Physical Address**

Review the vendor's business/physical address and make changes, if necessary.

Address 1 *	5025 N Central Ave., #494		
Address 2			
Address 3			
City *	Phoenix		
State/Province *	U.S. States/Provinces	Canadian Provinces	
	AZ	or	
Zip Code/Postal Code *	U.S. Zip Code	Canadian Postal Code	
	85012	-	
Country *	United States		

**Mailing Address**

Review the vendor's mailing address and make changes, if necessary.

Address 1 *	5025 N Central Ave., #494		
Address 2			
Address 3			
City *	Phoenix		
State/Province *	U.S. States/Provinces	Canadian Provinces	
	AZ	or	
Zip Code/Postal Code *	U.S. Zip Code	Canadian Postal Code	
	85012	-	
Country *	United States		

**NOTE:** This information is for the Certified Directory and can only be changed by authorized staff. **Vendors cannot change their certification record.** Changes made to the vendor data in the certification record are reflected only in the Certified Directory. Please refer to Chapter 2: Vendor Management for editing general vendor information.

---

Fill in the **Business Capabilities**. Click the **Add NAICS Codes** button to include the certified commodity codes for this firm. If your organization uses different code families for different certifications, only select the matching codes.

**Business Capabilities**

Enter descriptions of the vendor's certified capabilities. To add NAICS codes, click the Add NAICS Codes button.

Business certified for	Anything.
Full Description of Capabilities/Products	
NAICS Codes	<a href="#">Copy certified description</a> <input type="button" value="Add NAICS Codes"/> No Codes Assigned

**Business Information**

Enter the relevant business information, as requested.

Federal Tax ID Number	<input type="text"/>
Primary Owner's Social Security Number	<input type="text"/>
Gross Receipts	Average for last 3 year(s): \$0.00
	\$ <input type="text"/> in year ending <input type="text"/>
	\$ <input type="text"/> in year ending <input type="text"/>
	\$ <input type="text"/> in year ending <input type="text"/>
	\$ <input type="text"/> in year ending <input type="text"/>
	\$ <input type="text"/> in year ending <input type="text"/>
	\$ <input type="text"/> in year ending <input type="text"/>
	\$ <input type="text"/> in year ending <input type="text"/>
	\$ <input type="text"/> in year ending <input type="text"/>
Date Established/ Date Incorporated	Date Established: <input type="text"/> (mm/dd/yyyy) Date Incorporated: <input type="text"/> (mm/dd/yyyy)
Number of Employees	Full Time: <input type="text"/> Part Time: <input type="text"/> Contract: <input type="text"/>
Is the applicant interested in State Certification?	<input checked="" type="radio"/> N/A <input type="radio"/> Yes <input type="radio"/> No
Is the principal place of business in the State?	<input checked="" type="radio"/> N/A <input type="radio"/> Yes <input type="radio"/> No
US Citizen (born or naturalized)	<input type="radio"/> N/A <input checked="" type="radio"/> Yes <input type="radio"/> No

Some of these questions may be optional. If they are not required, you can leave them blank.

In the **Owner Ethnicity and Gender** box, select the choices that apply. You may skip the fields that do not apply to the certification.

Owner Ethnicity and Gender	
Select the appropriate settings for this application and business.	
Ethnic Group *	Hispanic
Gender *	Female
DBE Ethnic Group	None selected
State Ethnic Group	None selected

In the **Location and Work Districts/Regions** box, indicate the location in which the vendor works.

Location and Work Districts/Regions		
Select the work location and districts for this application and business.		
County	<input type="button" value="None selected"/> (state based on business/physical address - <a href="#">reload list</a> )	
Statewide Work Area	<input checked="" type="radio"/> N/A <input checked="" type="radio"/> Yes <input type="radio"/> No	
Work Districts/Regions	<input type="checkbox"/> Abilene - ABL (08) <input type="checkbox"/> Amarillo - AMA (04) <input type="checkbox"/> Atlanta - ATL (19) <input type="checkbox"/> Austin - AUS (14) <input type="checkbox"/> Beaumont - BMT (20) <input type="checkbox"/> Brownwood - BWD (23) <input type="checkbox"/> Bryan - BRY (17) <input type="checkbox"/> Childress - CHS (25) <input type="checkbox"/> Corpus Christi - CRP (16) <input type="checkbox"/> Dallas - DAL (18) <input type="checkbox"/> El Paso - ELP (24) <input type="checkbox"/> Fort Worth - FTW (02) <input type="checkbox"/> Houston - HOU (12)	<input type="checkbox"/> Laredo - LRD (22) <input type="checkbox"/> Lubbock - LBB (05) <input type="checkbox"/> Lufkin - LFK (11) <input type="checkbox"/> Odessa - ODA (06) <input type="checkbox"/> Paris - PAR (01) <input type="checkbox"/> Pharr - PHR (21) <input type="checkbox"/> San Angelo - SJT (07) <input type="checkbox"/> San Antonio - SAT (15) <input type="checkbox"/> Tyler - TYL (10) <input type="checkbox"/> Waco - WAV (09) <input type="checkbox"/> Wichita Falls - WFS (03) <input type="checkbox"/> Yoakum - YKM (13)

In the **Other Information** box, include the vendor's licenses and/or certificates, if any. For example, list food service companies that serve alcohol or electrical companies that are licensed, insured, and bonded. Do NOT list other AC/D/M/W/SBE certifications.

If your organization collects an application fee, the Certification Fee field displays. Select whether the fee was Paid, Not Paid, Exempt, or Waived. If it was paid, include the payment information.

Before reviewing the data, you can attach any relevant files and add comments for future reference.

You can use **Spell Check** to check spelling you entered in fields. When you are finished, review and save the information.

## Managing certifications

After publishing the certification to the directory, the next step is to notify the certified firm.

### Sending certification letters

The Certification module tracks letters sent to each firm. You can print and mail letters, with a copy sent by email and/or fax. If you want to save a printed letter to the vendor certification, you must save it manually. If you send a letter electronically, the system automatically saves a copy of the message in the vendor certification.

All letters are designed to include either your organization's letterhead, allowing you to print on blank paper, or to fit within the margins of your own letterhead.

### To generate and send a letter

1. Search for and locate the vendor for which you want to send a letter, and then click the **Certs** hyperlink.
2. Click the **Edit** hyperlink.
3. Go to the **Communications** tab, and then click the button for the letter you want to send.

Notifications Available to Send		Actions
Notification Type		
Approval Letter		<input type="button" value="Send Notification"/>
Certificate		<input type="button" value="Send Notification"/>
Renewal/Recertification Letter		<input type="button" value="Send Notification"/>
Expiration Warning Letter		<input type="button" value="Send Notification"/>
Expired Letter		<input type="button" value="Send Notification"/>
Add Custom/External Communication		<input type="button" value="Add Letter/Message"/>

Letters associated with specific actions are available from the Main and Alternate Actions tabs.

4. Select a template if multiple versions are available.
5. Complete any missing or optional information in the fields.

\* required entry

Certification Information	
Review the certification information. It will appear on the letter exactly as displayed below. Check the box to include the optional note.	
Certification Number	<input type="text" value="01000010"/>
Certification Type *	<input type="text" value="Disadvantaged Business Enterprise (DBE)"/>
Certification Date *	<input type="text" value="September 10, 2012"/>
Renewal Date *	<input type="text" value="September 30, 2013"/>
Expiration Date *	<input type="text" value="September 30, 2015"/>
NAICS Codes *	<input type="text"/>
Business Capability *	<input type="text" value="Anything."/>
Optional Note	<input type="checkbox"/> Include optional note? <small>NOTE: Our Certification program generally includes certification as a Disadvantaged Business Enterprise (DBE) under Department of Transportation regulations. Because your</small> <input type="text"/>

6. To print a letter, click the **Print Letter** button, and then adjust the settings and print the letter using your browser's fields and buttons.

**WARNING:** When printing your letters from the B2Gnow system, your browser may add unwanted headers and footers to your document. You can configure your browser to prevent this from happening. For more information, see Configuring headers and footers

Notification Templates & Formats		
Template	Hardcopy	Email/Fax
Certification Approved	<input type="button" value="Print Letter"/> <input type="button" value="Save Letter"/>	<input type="checkbox"/> <small>Send copy to you by email</small> <input type="button" value="Send Email/Fax"/>

7. To email or fax a letter, click the **Send Email/Fax** button. This triggers an email or fax to be sent to the vendor. A copy of the letter is automatically saved to the certification record.
8. To save a copy of a printed letter to the certification record, click the **Save Letter** button after printing your letter.

### Configuring headers and footers

**Internet Explorer 6 and 7:** In your web browser, open the Page Setup dialog box by clicking the File menu and selecting Page Setup. The Headers and Footers section contains special codes; these characters determine the headers and/or footers that print when you print a web page. To prevent unwanted text from printing in headers and footers, delete all characters.

**Firefox:** From the menu in the top left corner of your browser, select File, select Page setup. Go to the Margins & Header / Footer tab, and in the lists select Blank for all the items you don't want to print.

**Opera:** From the File menu, select Print Options. Clear the Print headers and footers check box, and then click OK.

### Viewing sent notifications

You can view a list of all letters sent to the firm by scrolling down to the Notifications Sent box on the vendor's Communications tab. Click the link under Message Number to view the permanent copy of the letter. Once saved, letters cannot be edited.

Notifications Sent			
Letter Type	Format	Date Sent/Saved	Message Number
Certification Approved	Letter	9/13/2012 9:22:09 PM	<a href="#">00700130-001</a> <a href="#">Delete</a>

## Sample certification letters

### Approval Letter

Test Vendor1  
SUB FLOORING, LLC  
5025 N Central Ave., #494  
Phoenix, AZ 85012

Certification # 13254

Dear Test Vendor1:

CONGRATULATIONS! Your application for certification as a **Small Business Enterprise (SBE)** is approved for a period of one year, expiring **April 30, 2008**.

We have certified **SUB FLOORING, LLC**, only for **Flooring- including concrete pouring, tiles, wood flooring, deck installation, floor restoration, floor finishing, repair, foundation checks, carpet installation and repair**. You are being listed in the Affirmative Action Directory of certified M/W/S/DBE, in the following Directory Capability listing:

NAICS-238110: CONCRETE FLOOR SURFACING  
NAICS-23833: FLOORING CONTRACTORS  
NAICS-238330: FIREPROOF FLOORING INSTALLATION  
NAICS-321114: FLOORING, WOOD BLOCK, TREATING

The certification covers only the one company, that which is listed in this letter and on the attached certificate, not any other company with which you may be associated, and only for those specific functions mentioned herein.

NOTE: Our Certification program generally includes certification as a Disadvantaged Business Enterprise (DBE) under Department of Transportation regulations. Because your company has either exceeded our programs graduation limitations, failed to submit the last three years of your business federal tax returns, or did not complete the Personal Financial Statement we cannot certify your company as a DBE. This means that you will be listed in our Directory as a WBE only and are NOT ELIGIBLE TO PARTICIPATE on federally-assisted projects as a DBE.

NOTE: Only fees or commissions received by a Broker for their participation on a contract may be counted towards an MBE or DBE goal, provided that they are not excessive as compared with fees customarily allowed for similar services.

NOTE: Your company's capabilities have been expanded to include the areas listed above. However, this expansion process does not supplement your required annual renewal, which occurs on the anniversary of your certification date. You are required to complete the renewal package and submit it for processing by our office.

The expiration date, which appears on this Certification letter, attached Certificate, or other related documentation will be superseded by a graduation date, should your firm be designated as an Established Business.

Each year one month prior to the anniversary date of your certification, you will receive a No Change Affidavit for completion. This form must be completed and returned along with a signed copy of your Personal Income Tax (Form 1040) and a copy of your Business Income Tax (Form 1120, 1065 or Schedule C). If you do not complete and return the above items, your certification will be revoked.

Failure to report changed information to us, or any subsequently discovered material misrepresentation in the certification application or in the execution of a contract, will be reason for revocation of certification for a five-year period.

The City M/W/S/DBE program's focus is to open the competitive process, and to afford you an opportunity to actually perform work or provide services/goods related to City taxpayers' projects. This program is working! Our FY 2004 figures are among the highest in the nation--\$1069.8 million earned by minority and women owned companies. We hope that in next year's figures we can count contracts you have received.

Again, congratulations. We welcome your participation, and wish you every success.

Very truly yours,



Velma Laws, Director  
Affirmative Action and Contract Compliance

## Recertification/Renewal Letter

Test Vendor1  
Sub Flooring, LLC  
5025 N Central Ave., #494  
Phoenix, AZ 85012

Re: Small Business Enterprise (SBE)

Dear Test Vendor1:

The anniversary of your firm's certification as a Small Business Enterprise (SBE) is approaching. You must renew your certification with the City of Houston. Please do this promptly so that your firm can retain its certification status.

Fill out the enclosed No-Change Affidavit, have it notarized, and return it with the supporting documents we have listed below. The City of Houston's Code of Ordinances<sup>1</sup> and/or Code of Federal Regulations, 49 CFR part 26<sup>2</sup>, requires that you do this annually. The affidavit verifies that your firm has not made any changes that prevent it from meeting size standards, disadvantaged status, ownership, management, and control requirements. However, if there are any changes, please note them on the form. We must receive your documents by 4/1/2008, or we will begin decertification process.

Please submit the following:

- Individual Tax Return Form 1040
- U.S. Corporation Income Tax Form 1120 or Form 1065 or Sole Proprietorship Form Schedule C Profit or Loss From Business
- Personal Financial Statement for each Disadvantaged Business Owner and Personal Tax Returns 1040
- All Documents indicating any change to certification-related information about your firm

If you have any questions, contact Isaiah Osazuwa at 713-837-9001 or [isaiah.osazuwa@cityofhouston.net](mailto:isaiah.osazuwa@cityofhouston.net).

Very truly yours,



Velma Laws, Director  
Affirmative Action and Contract Compliance

## Delisting Warning Letter

Test Vendor1  
Sub Flooring, LLC  
5025 N Central Ave., #494  
Phoenix, AZ 85012

Re: Small Business Enterprise (SBE)

Dear Test Vendor1:

Pursuant to 49 CFR Part 26 Subpart D Section 26.109 (c) you have failed to cooperate fully and promptly with the certification review of your firm. Accordingly, we propose to render a finding of noncompliance, which would result in the removal of eligibility of your firm to participate as a certified minority owned firm on federally funded projects.

In addition, pursuant to the City of Houston's Code of Ordinances Article 5 Section 15, you have failed to cooperate fully and promptly with the certification review of your firm. We are proposing to remove your eligibility to participate on city funded projects as a certified minority owned firm.

If you did not receive the recertification package, you may obtain it from our website at: [www.cityofhouston.gov](http://www.cityofhouston.gov). Hit the Mayor Office key and select Affirmative Action/Contract Compliance Division; on the next page hit Forms and select the Recertification Application Package. At this point, you must download these documents for completion and mail or deliver your package to the address on the application.

If you do not respond to our proposal by April 30, 2008 this process will become final, and we will proceed with the removal of your firm's eligibility as a Disadvantaged Business Enterprise (DBE) firm with the U. S. Department of Transportation, and/or Minority/Women/Small Business Enterprise (M/W/SBE) firm with the City of Houston.

If you have any questions concerning this process, please call Timothy Warren at (713) 837-9035.

Very truly yours,



Velma Laws, Director  
Affirmative Action and Contract Compliance

## Delisting/Expiration Letter

<p>Test Vendor1 Sub Flooring, LLC 5025 N Central Ave., #494 Phoenix, AZ 85012</p> <p>Dear Test Vendor1:</p> <p>Your certification with the City of Houston's Minority/Women/Small/Disadvantaged Business Enterprise Program has lapsed as of April 30, 2008 and is no longer active. The specific reason for your inactive status is due to you not complying with the two letters sent to your company requesting an update on the status of our company profile. These letters contained requests to complete the No Change Affidavit and to submit your previous year's Income Tax Return for yourself and for your company (i.e. Form 1040 and Schedule C if your company is a sole proprietorship or Form 1040 and Form 1120 for a corporation or Form 1040 and Form 1065 for a partnership).</p> <p>In order to reactivate your certification status, you must complete the No Change Affidavit and submit your previous year Income Tax Return (i.e. Form 1040 and Schedule C if your company is a sole proprietorship or Form 1040 and Form 1120 for a corporation or form 1040 and Form 1065 for a partnership), and any license(s) that is required, in order to operate your business.</p> <p>For further assistance please contact Yvette Cormier at 713-837-9039 or <a href="mailto:yvette.cormier@cityofhouston.net">yvette.cormier@cityofhouston.net</a>. Thank you for your cooperation.</p> <p>Very truly yours,</p> <p></p> <p>Velma Laws, Director Affirmative Action and Contract Compliance</p>	<p>Re: Small Business Enterprise (SBE)</p>
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## Editing certifications

You can view and edit information about the vendor's certificate, such as the certificate renewal and expiration dates.

### To edit a vendor's certification information

1. Search for and locate the vendor, and then click the **Certs** hyperlink.
2. On the **Vendor Profile: Certifications** page, click the **Edit** hyperlink.
3. Go to the **Data Input** tab.

**Certification: Data Input Compose**

<a href="#">Main</a>   <a href="#">Alternate Actions</a>   <a href="#">Comments</a>   <a href="#">Communications</a>   <a href="#">Timeline</a>   <a href="#">Data Input</a>   <a href="#">Owners</a>   <a href="#">Site Visits</a>   <a href="#">Misc</a>   <a href="#">Reports</a>   <a href="#">Cert List</a>		<a href="#">Help &amp; Tools</a> 																		
<p>B2Gnow Test Vendor 4 Phoenix, AZ DBE New</p> <p>Status: <b>Approved; Published to Directory</b></p> <p>Certification Officer: <b>Houston Admin7</b> Certification: <b>9/10/2012</b> Renewal: <b>9/30/2013</b> Expiration: <b>9/30/2015</b></p>																				
<p>Enter all relevant information from the application. Click <b>Review</b> to continue.</p> <p><b>* required entry</b></p> <table border="1"> <tr> <td colspan="2"> <b>Vendor Information</b> </td> </tr> <tr> <td>Business Name</td> <td>B2Gnow Test Vendor 4</td> </tr> <tr> <td>System Vendor Number</td> <td>20018259</td> </tr> <tr> <td>Certification Type</td> <td>DBE - Disadvantaged Business Enterprise</td> </tr> <tr> <td>Application Date</td> <td>9/13/2012 12:44:57 PM</td> </tr> </table> <table border="1"> <tr> <td colspan="2"> <b>Certification Information</b> </td> </tr> <tr> <td colspan="2">Enter details related to this particular certification.</td> </tr> <tr> <td>Certification Number *</td> <td><input type="text" value="01000010"/></td> </tr> <tr> <td>Certification Date *</td> <td><input type="text" value="9/10/2012 (mm/dd/yyyy)"/></td> </tr> </table>			<b>Vendor Information</b>		Business Name	B2Gnow Test Vendor 4	System Vendor Number	20018259	Certification Type	DBE - Disadvantaged Business Enterprise	Application Date	9/13/2012 12:44:57 PM	<b>Certification Information</b>		Enter details related to this particular certification.		Certification Number *	<input type="text" value="01000010"/>	Certification Date *	<input type="text" value="9/10/2012 (mm/dd/yyyy)"/>
<b>Vendor Information</b>																				
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<b>Certification Information</b>																				
Enter details related to this particular certification.																				
Certification Number *	<input type="text" value="01000010"/>																			
Certification Date *	<input type="text" value="9/10/2012 (mm/dd/yyyy)"/>																			

4. Edit the information, as needed.

**Certification Information**

Enter details related to this particular certification.

Certification Number	<input type="text"/>
Certification Date	<input type="text"/> (mm/dd/yyyy)
Next Renewal Date	<input checked="" type="radio"/> 9/30/2013 (mm/dd/yyyy) <input type="radio"/> 1 <input type="button"/> year(s) <input type="button"/>
Expiration Date	<input checked="" type="radio"/> 9/30/2015 (mm/dd/yyyy) <input type="radio"/> 3 <input type="button"/> year(s) <input type="button"/>
Renewal/Expiration Setting	<input type="radio"/> Automatic. This certification will automatically be removed from the active directory if it is not renewed/recertified by the renewal date. <input checked="" type="radio"/> Manual. This certification will remain listed on the active directory after the renewal date is reached.

5. To verify the information, click **Review**.  
 6. Click **Save**.

## Expiring certifications and renewals

It is the vendor's responsibility to maintain a certification by submitting the renewal application on time, providing the certifying agent with correct documentation, and keeping business information up-to-date.

You can use the search and reporting tools to generate lists of expiring vendors by specifying options in the Certification Parameters box when searching for vendors. For the search, select the parameters and click **Search All Matches**.

To view a list of firms assigned to a particular staff member, from the Assigned Certification Officer list, select the staff member. The search results show certifications assigned to the selected certification officer.

**Certification Parameters**

Certifications	Match ANY certification type selected below <input type="button"/>
<input type="checkbox"/> Select all <input type="checkbox"/> Unselect all	
<input type="checkbox"/> City of Houston <input type="checkbox"/> Airport Concessionaire Disadvantaged Business Enterprise (ACDBE) <input type="checkbox"/> Minority Business Enterprise (MBE) <input type="checkbox"/> Minority/Disadvantaged Business Enterprise (M/DBE) <input type="checkbox"/> Small Business Enterprise (SBE) <input type="checkbox"/> Women/Disadvantaged Business Enterprise (W/DBE) <input type="checkbox"/> Women Business Enterprise (WBE) <input type="checkbox"/> Disadvantaged Business Enterprise (DBE) <input type="checkbox"/> Persons with Disabilities Business Enterprise (PDBE)	
Certification Action	<input type="button"/> All actions
Certification Status	<input type="button"/> Expired (w/out pending or approved applic.) - select a date range below <input type="button"/> Optional Process Step: <input type="button"/> All Optional Date Range: <input type="text"/> to <input type="text"/> (mm/dd/yyyy) <input type="checkbox"/> Limit expiring/expired (w/out pending applic.) search filter to same certification type <input type="checkbox"/> Use ORIGINAL renewal/expiration date for expiring/expired search filter
Assigned Certification Officer	<input type="button"/> None selected
Business Category	<input type="button"/> No category selected or <input type="button"/> No capability selected

**To send a certification letter to multiple vendors**

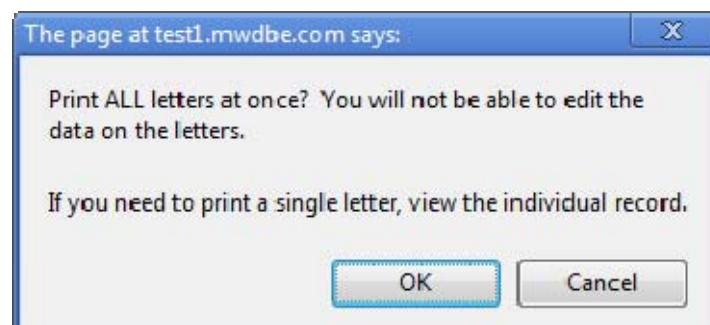
1. From the search results page, click **Send Certification Letters**.

To resort, click on column title.

Business Name	Phone Number	Location	Certification	Actions
All				
Deuce Creative, LLC		Houston, TX	WBE (Active)	20055868 <a href="#">Edit</a> <a href="#">QuickView</a> <a href="#">Contracts</a> <a href="#">Concessions Certs</a>
Smith, Graham & Company Investment Advisors, L. P.		Houston, TX	MBE (Active)	20055569 <a href="#">Edit</a> <a href="#">QuickView</a> <a href="#">Contracts</a> <a href="#">Concessions Certs</a>

1 - 2 of 2 records displayed: Page

2. Click **OK** to indicate you want to print the letters.



3. Review the recipient list and, if necessary, clear the check boxes for the vendors you do not want to include.

**Certification: Print Multiple Letters** Help & Tools 

\* required entry

Contact List						
Business Name	Certification Type	Owner's Name	Owner Notification Method	User Notification Method	Include	?
Select contact options:						
Deuce Creative, LLC	WBE	Graham Smith	<input type="radio"/> Use Owner Information	<input type="radio"/> Use User Information	<input checked="" type="checkbox"/>	?
Smith, Graham & Company Investment Advisors, L.P.	MBE	Gerald Heimbinder	<input type="radio"/> Use Owner Information	<input type="radio"/> Use User Information	<input checked="" type="checkbox"/>	?

Notification Templates & Formats						
Template	Hardcopy			Email/Fax		
Certificate (DDC)	<input type="button" value="Print Letters"/>	<input type="button" value="Save Letters"/>	<input type="button" value="Send Letters"/>	No Template		
Certification Approved	<input type="button" value="Print Letters"/>	<input type="button" value="Save Letters"/>	<input type="button" value="Send Emails/Faxes"/>			
Close	<input type="button" value="Print Letters"/>	<input type="button" value="Save Letters"/>	<input type="button" value="Send Emails/Faxes"/>			
Delisted	<input type="button" value="Print Letters"/>	<input type="button" value="Save Letters"/>	<input type="button" value="Send Emails/Faxes"/>	No Template		
Certificate (Non-DBE)	<input type="button" value="Print Letters"/>	<input type="button" value="Save Letters"/>	<input type="button" value="Send Letters"/>	No Template		
Returned - Substantially Incomplete	<input type="button" value="Print Letters"/>	<input type="button" value="Save Letters"/>	<input type="button" value="Send Letters"/>	Send Emails/Faxes		
Recertification	<input type="button" value="Print Letters"/>	<input type="button" value="Save Letters"/>	<input type="button" value="Send Letters"/>	Send Emails/Faxes		
Certification Expiration Warning	<input type="button" value="Print Letters"/>	<input type="button" value="Save Letters"/>	<input type="button" value="Send Letters"/>	Send Emails/Faxes		
Certification Expired	<input type="button" value="Print Letters"/>	<input type="button" value="Save Letters"/>	<input type="button" value="Send Letters"/>	No Template		

Email/fax notification options are displayed based on organization configuration and contact notification methods.

Save for another user to generate print run.

- To print letters, click the **Print Letters** button for the type of letters you want to print, and then adjust the settings and print the letter using your browser's fields and buttons.
- To email or fax a letter, click the **Send Email/Fax** button, and then click **OK**.
- To save a copy of a printed letter to the certification record, click the **Save Letter** button after printing your letter.

**NOTE:** Generating letters for several firms at the same time can sometimes take several minutes.

You can also add these vendors to Outreach Campaigns (Optional module) or send them a message through the system.

## Recertifying/Renewing certifications

When a vendor is ready for recertification or renewal, you must create a new certification record that is separate from the original certification. There are a number of reasons why you cannot amend a current certification:

1. By amending the expiring certification, you will have no record of previous certifications.
2. By renewing/recertifying, the vendor's application must complete the defined review process, and this must be tracked on a new record.
3. If you continually reuse the same record, the historical data will be lost and the quality of your information will be limited.

Current Certifications							
Type	Action	Effective	Renewal	Expiration	Organization	Reviewer	Actions
DBE	New	9/10/2012	9/30/2013	9/30/2015	City of Houston	Houston Admin7	<a href="#">View</a> <a href="#">Edit</a>
SBE	New	5/10/2011	9/30/2012	9/30/2012	City of Houston	Houston Admin8	<a href="#">View</a> <a href="#">Edit</a>

[Change Request List](#)

Pending/In Process Certifications					
Type	Action	Application Date	Organization	Reviewer	Actions
SBE	Recertification/ Renewal/ Annual	9/15/2012	City of Houston	Houston Admin6	<a href="#">Process</a>

When completing the renewal or recertification process, most information from the previous certification will be carried over; however, you must re-enter a small amount of application data.

### To recertify/renew a vendor certification

1. Search for and locate the vendor for which you want to renew or recertify a certification, and then click the **Certs** hyperlink.
2. Click the **New Record** button.

3. In the **Renewal** area, use the drop-down list to specify the certification you want to renew or recertify.

**Certification: Start** Help & Tools 

Start | B2GNow Test Vendor 4  
Phoenix, AZ

Select the appropriate settings for the new certification record and click the **Submit** button.

**\* required entry**

**Certification Parameters**

<b>Certification Type &amp; Action</b>	New - Record(s) will be created from scratch using default settings. * (Select action for each type needed)
	<ul style="list-style-type: none"> <li>- Select - ACDBE - Airport Concessionaire Disadvantaged Business Enterprise</li> <li>- Select - MBE - Minority Business Enterprise</li> <li>- Select - SBE - Small Business Enterprise</li> <li>- Select - WBE - Women Business Enterprise</li> <li>- Select - DBE - Disadvantaged Business Enterprise</li> <li>- Select - PDBE - Persons with Disabilities Business Enterprise</li> </ul>
<b>Renewal</b> - Relevant previous certification data will be copied to the new record. <ul style="list-style-type: none"> <li>- Select - SBE Certified: 5/10/2011; Renewal due: 9/30/2012; Expiration: 9/30/2012</li> <li>- Select - DBE Certified: 9/10/2012; Renewal due: 9/30/2013; Expiration: 9/30/2015</li> </ul>	
<b>Company Type *</b>	<input checked="" type="radio"/> Corporation <input type="radio"/> LLC <input type="radio"/> LLP <input type="radio"/> Partnership <input type="radio"/> Joint Venture <input type="radio"/> Sole Proprietorship <input type="radio"/> Limited Joint Venture <input type="radio"/> Franchise
<input type="button" value="Create Certification(s)"/> <input type="button" value="Cancel"/>	

4. Click **Create Certification(s)**.

5. Use the fields and checklists to process the certification, as needed.

Once you publish the renewal/recertification to the directory, the older certification is deactivated. Deactivating the certification removes it from the active certified vendor search.

**Current Certifications**

Type	Action	Effective	Renewal	Expiration	Organization	Reviewer	Actions
DBE	New	9/10/2012	9/30/2013	9/30/2015	City of Houston	Houston Admin7	<a href="#">View</a> <a href="#">Edit</a>
SBE	Recertification/ Renewal/ Annual	9/15/2012	9/30/2013	9/30/2014	City of Houston	Houston Admin6	<a href="#">View</a> <a href="#">Edit</a>

[Change Request List](#)

**Other Certifications**

Status	Type	Action	Action Date	Cert Dates	Organization	Reviewer	Actions
Deactivated	SBE	New	9/15/2012	Cert: 5/10/2011 Renew: 9/30/2012 Exp: 9/30/2012	City of Houston	Houston Admin8	<a href="#">View</a> <a href="#">Edit</a>