Small Business, Small Diverse Business & Veteran Business Enterprise

APPLICATION GUIDE
FEBRUARY 2020
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## Eligibility Requirements

<table>
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<tr>
<th>Small Business</th>
<th>Small Diverse Business</th>
<th>Veteran Business Enterprise</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. For-profit, United States business</td>
<td>1. Small Business self-certification</td>
<td>o Vets First Verification Program</td>
</tr>
<tr>
<td>2. Independently owned</td>
<td>2. Current third-party certification from:</td>
<td>o Disability:IN (Disabled or Service-Disabled Veteran only)</td>
</tr>
<tr>
<td>3. Not dominant in its field of operation</td>
<td>o Unified Certification Program (UCP) (Any state; this links to the PA UCP)</td>
<td></td>
</tr>
<tr>
<td>4. No more than 100 Full-Time Equivalent (FTE) Employees*</td>
<td>o Woman's Business Enterprise National Council (WBENC)</td>
<td></td>
</tr>
<tr>
<td>5. May not exceed three-year average gross revenues of $38.5 Million</td>
<td>o National Minority Supplier Development Council (NMSDC)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o United States Small Business Administration (SBA) 8(a) Program</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Vets First Verification Program (Service-Disabled Veteran only)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Disability:IN (formerly US Business Leadership Network (USBLN))</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o National LGBT Chamber of Commerce (NGLCC)</td>
<td></td>
</tr>
</tbody>
</table>

* FTE Employees can be determined for a period of time (e.g. 12 months) using the following calculation:

\[
\text{All Hours Worked by All Employees} \div \text{Total Hours in a Full Time Schedule}
\]
Register as a Vendor with the Commonwealth

Skip this if you’ve already completed your Commonwealth Vendor Registration and obtained a 6-digit SAP number (Vendor ID).

1. Go to the PA Supplier Portal at www.pasupplierportal.state.pa.us.
2. Click on Supplier Registration and follow the instructions.

Small Business Self-Certification/Small Diverse & Veteran Business Verification Application

1. Go to http://bdisbo.prismcompliance.com
2. Click Self-Certify or Recertify as a Small and/or Small Diverse Business.
3. Click Start Application > Start Application  
   a. Who does this? 
      i. Companies renewing their Small/Small Diverse/Veteran Business  
      ii. Companies self-certifying for the first time as Small Business, Small/Small Diverse Business, and/or Small/Veteran Business  
      iii. Companies already self-certified as Small Business wishing to add a Small Diverse Business or Veteran Business Enterprise verification  

   b. See Resuming an Incomplete or In Process Application if returning to continue an incomplete application
4. Enter the company’s Tax ID Number (no spaces or dashes) and 6-digit Vendor ID > Find Me
   a. Go to www.supplierportal.state.pa.us > Supplier Registration if you do not have a Vendor ID
   b. Contact the Supplier Service Center at RA-PSC_supplier_requests@pa.gov or 877-435-7363, option 1, if you do not know your Vendor ID

5. Select one of the options below > Continue
   a. SB Only if
      i. You wish to self-certify or recertify as a Small Business only
   b. SB & SDB if
      i. Your company holds a current certification through one of the approved third parties AND
      ii. You wish to self-certify or recertify as Small Business (SB) and verify as a Small Diverse Business (SDB) or Veteran Business Enterprise (VBE) OR
   c. Already certified Small Businesses will be asked if they want to complete a Small Diverse Business application
      i. Click Yes > Continue if you wish to add a verification Small Diverse Business verification as a Minority, Woman, LGBT, or Disability-Owned Business Enterprise or a Veteran or Service-Disabled Veteran Business Enterprise (you will skip steps 7 - 12 below)
6. Enter a valid email address > Send > Continue
   a. PRiSM will forward the unique application ID to re-enter an incomplete application from the initial start page at any time by clicking on Complete a Started Application
   b. SAVE THIS EMAIL
7. Enter your general contact information
   a. The Legal Name, DBA Name, Business Phone, Business Fax, Website, and Email address will be pulled directly from the company’s vendor registration and cannot be edited (grayed out)
      i. If any of the information is incorrect, log into your vendor registration at www.pasupplierportal.state.pa.us > Log On to update
      ii. For questions or assistance to update your vendor registration
         1. Visit www.dgs.pa.gov > Businesses > Materials & Services Procurement > Supplier Service Center > PA SUPPLIER Administrative Support
         2. Contact the PA Supplier Portal service center at 877-735-7363, option 1, or RA-PSC_Supplier_Requests@pa.gov
   b. Enter Mailing Address (optional) and Primary Contact Name (required) > Continue
c. Check Yes or No for each question > Continue
d. For the final question, “Has your company filed a federal tax return or an Application for Automatic Extension of Time to File within the last three years?”, select Yes if the company has, within the last three tax years, filed a return or an extension to file a return, or No if the company is newly established, has done no business, or has not and will not file a return or extension to file a return for any of the last three tax years.

8. Enter information on the company’s structure and ownership > Continue
9. Select a business type for the company and codes to identify the company’s supplies and services > Continue
   a. Select the main area in which the applicant business provides materials or service(s): Select the company’s primary business activity (see the definitions of each business activity on the following page)
   b. Industry Code: Enter a UNSPSC code or a description of a supply or service > select a code > Add Code
      i. Repeat for each supply or service
         1. Supply Codes begin 1 - 6 and 95; Service Codes begin 7 - 94
      ii. Select up to 100 codes
      iii. To find applicable codes
         1. Visit www.unspsc.org
         2. Download a complete code list in Excel format at www.dgs.pa.gov > Businesses > Small Diverse Business Program > Locate Small & Small Diverse Businesses
         3. Note that this application uses only UNSPSC class codes (ending in 00)
<table>
<thead>
<tr>
<th>Business Type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procurement Services</td>
<td>Includes all labor and time expended for professional or general services, such as training, healthcare, environmental remediation, and consulting. Excludes all services and labor associated with Construction, Building Design and/or Information Technology.</td>
</tr>
<tr>
<td>Procurement Goods</td>
<td>Includes goods, supplies, materials, equipment, and/or environmental remediation supplies. Excludes the purchase of services, real property, IT computers, peripherals and hardware.</td>
</tr>
<tr>
<td>Information Technology</td>
<td>Includes all goods and services associated with the design, development, installation, and implementation of information systems and applications including computers, peripherals and/or hardware as well as project management and IT consulting.</td>
</tr>
<tr>
<td>Building Design Services</td>
<td>Includes architectural and engineering services in connection with the design or planning of buildings and the space within the site surrounding the buildings.</td>
</tr>
<tr>
<td>Construction</td>
<td>Includes the labor and supplies necessary to build, alter, repair, improve, or demolish any structure, building or public improvement.</td>
</tr>
<tr>
<td></td>
<td>*Not available for selection. Select Construction Contractor, Construction Stocking Supplier, or Construction Non-Stocking Supplier, as applicable</td>
</tr>
<tr>
<td>Construction Contractor</td>
<td>Provides construction labor and/or services and may provide goods or materials associated with that construction labor or service.</td>
</tr>
<tr>
<td>Construction Stocking Supplier</td>
<td>Stocking Suppliers own, operate, or maintain a store, warehouse, or other establishment, in which the materials, supplies, articles or equipment are bought, kept in stock, and regularly sold or leased to the public in the usual course of business.</td>
</tr>
<tr>
<td>Construction Non-Stocking Supplier</td>
<td>Non-Stocking Suppliers do not carry inventory, but order materials from a manufacturer, manufacturer’s representative, or a stocking supplier.</td>
</tr>
</tbody>
</table>
10. Check the county(-ies) in which the company prefers to do business > Continue

11. Enter information on the company’s ownership > Continue
12. The % of Ownership must add up to 100% in total
13. For the last three most recently filed tax years, enter the company’s gross revenues as reported on line 1a (Gross receipts or sales) of the federal tax return filed for the company.

a. If an extension has been filed for the most recent tax year, enter the estimated gross receipts or sales on the bottom half of the form and the date the return is expected to be filed.

i. Copies of Page 1 of the federal tax returns which report Gross sales and receipts on line 1 or 1a and/or, if applicable, Form 7004 or 4868, Application for Automatic Extension of Time to File will be required to be submitted on the Application Checklist page which appears later in the application.

b. If no return or extension to file a return has been filed for the last three tax years (e.g. the company is newly established), leave fields blank and continue to the next page.
14. If you selected to apply for verification as an SDB or VBE, enter information on the third-party certification > Save Certification
   a. Repeat for each third-party certification > Continue
   b. See Eligibility Requirements of listing of accepted third parties

c. If you selected SB & SDB to certify as a Small and Small Diverse Business/Veteran Business Enterprise in error (see step 5 above)
   i. Option 1
      1. Continue the application, entering anything on the Certification page
      2. Upload a note on the Certification Checklist page (see next step) informing BDISBO that your company is self-certifying as a Small Business only
      3. BDISBO will decline the Small Diverse Business/Veteran Business Enterprise verification during the review process
         a. You will receive an automatic email at the time of denial
         b. Denial will be for Small Diverse Business or Veteran Business Enterprise portion of the application only and will not impact your Small Business self-certification
   ii. Option 2
      1. Contact BDISBO at gs-bdisbo@pa.gov or 717-783-3119 to have the in-process application deleted
      2. Restart the application, selecting SB Only (Step 5) to complete the Small Business application
15. If electing to apply for certification as a Small Business (SB) only:
   a. Load company’s supporting federal tax returns for the last three tax years by clicking **Select File**
      i. Upload Page 1 of the tax returns filed for the three most recent tax years (page 1 reports *Gross sales and receipts* on line 1 or 1a)
      ii. Upload a copy of *Form 7004* or *4868, Application for Automatic Extension of Time to File* if an extension has been filed for the most recently completed tax year and the return is still in process
      iii. Check **N/A** if no federal tax returns or extensions have been filed for the company for any of the three most recent tax years (e.g. newly established business)
      iv. Click **Continue** once all documentation has been submitted
16. If electing to apply for certification as a Small Business (SB) and verify as a Small Diverse Business (SDB) or Veteran Business Enterprise (VBE):
   a. Load company’s supporting federal tax returns for the last three tax years by clicking **Select File**
      i. Upload Page 1 of the tax returns filed for the three most recent tax years (page 1 reports **Gross sales and receipts** on line 1 or 1a)
      ii. Upload a copy of **Form 7004 or 4868, Application for Automatic Extension of Time to File** if an extension has been filed for the most recently completed tax year and the return is still in process
      iii. Check **N/A** if
          1. No federal tax returns or extensions have been filed for the company for any of the three most recent tax years (e.g. newly established business) OR
          2. You hold a current Small Business self-certification for your company, your Small Business self-certification is not within 30 days of expiration, and you are adding a Small Diverse Business or Veteran Business Enterprise verification to your already existing Small Business self-certification
   b. Submit the supporting documentation as proof of certification through one or more of the approved third-party certifiers

<table>
<thead>
<tr>
<th>Third-Party Certifier</th>
<th>Verification Program/Type</th>
<th>Required Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>WBENC</td>
<td>• WBE</td>
<td>• Current certificate</td>
</tr>
<tr>
<td>NMSDC</td>
<td>• MBE</td>
<td>• Current certificate</td>
</tr>
<tr>
<td>UCP</td>
<td>• MBE</td>
<td>• Current certification letter or continuing eligibility letter</td>
</tr>
<tr>
<td></td>
<td>• WBE</td>
<td>• Copy of profile from public, online directory</td>
</tr>
<tr>
<td></td>
<td>• MWBE</td>
<td>• Proof of race, ethnicity, and/or gender (see below)</td>
</tr>
<tr>
<td>SBA 8(a)</td>
<td>• MBE</td>
<td>• Current certification letter or continuing eligibility letter</td>
</tr>
<tr>
<td></td>
<td>• WBE</td>
<td>• Proof of race, ethnicity, and/or gender (see below)</td>
</tr>
<tr>
<td></td>
<td>• MWBE</td>
<td></td>
</tr>
<tr>
<td>NGLCC</td>
<td>• LGBTBE</td>
<td>• Current certificate</td>
</tr>
<tr>
<td>Vets First</td>
<td>• SDVBE</td>
<td>• Current certification letter</td>
</tr>
<tr>
<td></td>
<td>• SDVBE</td>
<td>• Copy of profile from public, online directory</td>
</tr>
<tr>
<td>Disability:IN</td>
<td>• DOBE</td>
<td>• Current certificate</td>
</tr>
<tr>
<td></td>
<td>• SDVBE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• DVBE</td>
<td></td>
</tr>
</tbody>
</table>

**Accepted Proof of Race or Gender**

<table>
<thead>
<tr>
<th>Proof</th>
<th>WBE</th>
<th>MBE</th>
<th>Exception</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birth Certificate</td>
<td>X</td>
<td>X*</td>
<td></td>
</tr>
<tr>
<td>Passport</td>
<td>X</td>
<td>X*</td>
<td></td>
</tr>
<tr>
<td>Driver’s License</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Naturalization Papers</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Tribal Card</td>
<td>X</td>
<td>X*</td>
<td></td>
</tr>
<tr>
<td>Military Records</td>
<td>X</td>
<td>X*</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td>*Accepted for MBE only if ethnicity/race is indicated</td>
</tr>
</tbody>
</table>

Documents showing how vendors hold themselves out to community (i.e. member of minority chamber, etc.) or showing recognition by other government entities as minorities or minority-owned businesses may be accepted as proof of MBE or WBE on case-by-case basis
SB and SDB Certification Application

Application Checklist

Tax Return Details:
Scan or identify the following pages of your company's three most recent federal tax returns which will be required for verifying your annual gross sales. You may redact your federal tax identification number if desired. Only the first page of the return is needed.

- Page 1 of Federal form 1120 or 1120S, the U.S. Corporation Income Tax Return
- Page 1 of Federal form 1065, the U.S. S Return of Partnership Income
- Page 1 of Federal form 1040 schedule C, Profit of Loss from Business, Sole Proprietorship.

If your company has not yet filed a federal tax return because you have filed an Application for Automatic Extension of Time to File, Form 4868 or Form 7004, please submit a copy of the filed extension form to act as a temporary placeholder until the return itself is filed. At that time, page 1 of the return will be required or the Small Business certification will be withdrawn.

If applying for verification as a Small Diverse Business, please provide supporting documentation as shown below:

<table>
<thead>
<tr>
<th>Current Certificate</th>
<th>Required Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>3rd Party Certification</td>
<td>Current Certificate</td>
</tr>
<tr>
<td>Women’s Business Enterprise National Council</td>
<td>1. Most current certification letter</td>
</tr>
<tr>
<td>National Minority Supplier Development Council</td>
<td>2. Copy of currently dated online DBE profile</td>
</tr>
<tr>
<td>National Gay &amp; Lesbian Chamber of Commerce</td>
<td>3. Proof of race, ethnicity, and/or gender</td>
</tr>
<tr>
<td>Disability:IN</td>
<td></td>
</tr>
<tr>
<td>Unified Certification Program (any state)</td>
<td>1. Most current certification letter</td>
</tr>
<tr>
<td></td>
<td>2. Copy of currently dated online DBE profile</td>
</tr>
<tr>
<td>U.S. Small Business Administration 8(a) Program</td>
<td>3. Proof of race, ethnicity, and/or gender</td>
</tr>
<tr>
<td>Vets First Verification</td>
<td>1. Most current certification letter</td>
</tr>
<tr>
<td></td>
<td>2. Copy of currently dated online VOSB or SDVOSB profile</td>
</tr>
</tbody>
</table>

Examples of proof of gender are: Birth Certificate, Passport, Driver’s License, Naturalization Papers, Tribal Cards, Military Records. Examples of proof of race or ethnicity are Naturalization Papers and Tribal Cards. Birth Certificates, Passports, and Military Records may also be accepted as proof of race or ethnicity if noted. Other documentation showing how the owners hold themselves out to the community or showing recognition by other government entities may be considered on a case-by-case basis.

Upload your previous three (3) years of Federal Tax Returns (see above for details):


Upload your Diversity Certificates and Supporting Documentation (see above for details):

- [2018 WBENC.pdf] 2018 WBENC.pdf

There are many solutions available to reduce a file’s size. They range from re-scanning your document with a decreased scan resolution and setting it to be in black and white to using software applications like Adobe Acrobat. Since everybody’s computer is setup differently, we cannot provide a solution that will work for everybody. We suggest contacting a Computer Professional or searching on the internet to find the best solution for you.

[<< Back] [Continue >>]
17. Enter the name and title of the application preparer and check the box > Submit Application

![SB Certification Application]

- Signature: J. J. Doe
- Title: President
- Date: 06/13/2019

By checking this box, I understand that my business is required to maintain a continuing certification with an approved third-party certifier in order to meet the requirements necessary for Small Diverse Verification as set forth in 4 PaCode §§ 55.301 et seq. at all times that it is so registered with the Department of General Services. I understand that I must immediately notify the Department of General Services of any changes in my business that may affect its status as a Small Diverse Business. I further understand that the Bureau of Diversity, Inclusion, and Small Business Opportunities (BDISBO) reserves the right to require applicants and certified Small Diverse Business to submit proof of current third-party certification any time.

18. Small Business self-certification is immediate

![THANK YOU FOR YOUR SUBMISSION]

- Documents submitted for Small Diverse Business and Veteran Business Enterprise verification will be reviewed
- Additional information may be requested
- You will receive another email once the verification is approved
Resuming an Incomplete or In Process Application

PRiSM allows user to stop midway during the application process and resume at a later time.

1. Go to http://bdisbo.prismcompliance.com
2. Click Self-Certify or Recertify as a Small and/or Small Diverse Business.
3. **Click Complete a Started Application**

4. **Enter your Application ID > Go**
   a. The Application ID was sent to the email you entered at the beginning the application process

   b. If you started an application but cannot locate or remember the Application ID, to resend
      i. Click **I think I lost my Application ID**
         1. Enter the email address to which you originally sent the Application ID at the beginning of the application process
         2. Enter your company’s Tax ID (no spaces or dashes) **OR** 6-digit Vendor ID (SAP ID)
Register as a PRiSM User

Register to create a Username and Password with PRiSM to maintain your account information, set up additional users, etc. (new PRiSM users only).

1. Once the self-certification process is complete, you will receive an email informing you of your PIN and directing you to register as a User
   a. **KEEP THE PIN**
   b. If you do not receive the email
      i. Contact BDISBO at RA-SmallBusiness@pa.gov or GS-BDISBO@pa.gov for your PIN
      ii. Go to http://userregistration.prismcompliance.com to register as a User with Prism

2. Click **Register Now**

3. Enter your **EIN** (no dashes or spaces) and **PIN** numbers
4. Enter the **CAPTCHA** code displayed on the screen

5. Click **Next**

   - If you receive the *Your PIN and/or EIN does not match our records*... pop-up, please verify your EIN and PIN numbers. If you continue to receive the message, please contact BDISBO at [RA-SmallBusiness@pa.gov](mailto:RA-SmallBusiness@pa.gov) or [GS-BDISBO@pa.gov](mailto:GS-BDISBO@pa.gov) for assistance.

6. Check the **We Found You**. box after reviewing the line to make sure the correct business name is displayed

   - If incorrect business name displayed, contact BDISBO at [RA-SmallBusiness@pa.gov](mailto:RA-SmallBusiness@pa.gov) or [GS-BDISBO@pa.gov](mailto:GS-BDISBO@pa.gov) for assistance.

7. Click **Next**

8. Review, correct, and/or enter business information requested on screen

9. After entering/reviewing your email address, click **Validate**

   - A **Validation Code** will be sent to email address you entered
   - Open your email and retrieve the Validation Code
   - If you do not receive the email, check your spam folder for an email from [DoNotReply@prismcompliance.com](mailto:DoNotReply@prismcompliance.com). The subject of the email will be **PRISM verification code**.
10. Click **Ok** on **A validation code has been sent...** pop-up message

11. Enter the Validation Code from email into **Validation Code** field

12. Click **Next**

13. Complete the **Username**, **Password** and **Hint** fields
   a. Username and Password must be 6-20 characters long and contain at least one letter (e.g. Aa Bb Cc), one number (1 2 3 4 5 6 7 8 9 0), and **NO** symbols (e.g. ! @ $ % ^ & * ( ) - = +)

14. Click **Next**

15. Review the **Terms of Usage** and check the box beside **I agree with the Terms of Usage**

16. Click **Register Me**

17. Once completed, you will receive a **Registration has completed successfully!** message on the screen and an email with the **Username** you entered
Managing Your PRiSM Account

Login to your PRiSM account to update passwords, add new users, edit users, print certificates, etc.

1. Go to http://bdisbo.prismcompliance.com
2. Enter your Username and Password > Login

3. Click Administration

4. Click Manage Vendor Records

Update Profile Information
1. Click on the Profile tab to review, correct, and/or enter the business information requested on the screens

a. Certain fields read-only
   i. This information populated with data captured from vendor record in Pennsylvania’s Supplier Portal
   ii. If values incorrect, contact the support at toll free: (877) 435-7363 (option 1), or email rapsc_supplier_requests@pa.gov to correct
b. Complete or update the **Name**, **Phone** and **Email** for **Contact Information 1** as this is the information that will be used in PRISM to send you future communications.

![Contact Information 1](image)

- **Name**
- **Title**
- **Phone**
- **Cell Phone**
- **Email**

- **Market Area**

  Select the counties in which your company can do business.

  ![Market Area](image)

  a. Under Market Area, select the counties in which your company can do business

  b. Under Market Area, select the counties in which your company can do business

  c. Under Market Area, select the counties in which your company can do business

**Update Address**

1. Click on the **Address** tab to review, correct, and/or enter the business information requested on the screens

   ![Address Tab](image)

   a. Primary Address information is populated with data captured from Pennsylvania’s Supplier Portal and is read-only.

   i. If values incorrect, contact the support at toll free: (877) 435-7363 (option 1), or email [ra-psc_supplier_requests@pa.gov](mailto:ra-psc_supplier_requests@pa.gov) to correct

   b. Second Address information populated with your mailing address and is read-only.

   i. If values incorrect, contact the support at toll free: (877) 435-7363 (option 1), or email [ra-psc_supplier_requests@pa.gov](mailto:ra-psc_supplier_requests@pa.gov) to correct

**Review Certifications**

1. Click on the **Certifications** tab

   ![Certifications Tab](image)

   2. Review the Certifications (examples shown below)

   ![Certifications](image)

   a. Information read-only

   b. If values incorrect, please contact BDISBO at [RA-SmallBusiness@pa.gov](mailto:RA-SmallBusiness@pa.gov) or [GS-BDISBO@pa.gov](mailto:GS-BDISBO@pa.gov) for assistance.
Review Industry UNSPSC Codes

1. Click on Industry tab

![Image of Administration menu >> Manage Vendor Records]

2. Codes can be updated directly at time of initial certification or during recertification
   a. Contact BDISBO at RA-SmallBusiness@pa.gov or GS-BDISBO@pa.gov for code changes at any other time

Add New Users

1. Click Manage Users Profile

![Image of Manage Users Profile]

2. Click Add New User

![Image of Add New User]

3. Complete the required fields
   a. The password you enter is only a temporary password. When the user first logs into PRiSM, they will be prompted to change it.

![Image of User ID field]

4. Click Save

![Image of Cancel and Save buttons]

5. Provide the Username (User ID) and Password you entered to user
   a. User will receive an email with your business’ PRiSM PIN number, so if they forget their User ID in the future they can click New Log In Help? on the log in page to retrieve it.