



Consolidated Annual Report Training for FI\$Cal Users

FISCAL YEAR 2025-26

Presented by
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Research and Data Specialist & Reporting Analyst

Welcome and Introductions

- Alannah Chapman – Research and Data Specialist
- Luke Scholl – Reporting Analyst
- Imran Chaudhary – Statewide Advocacy Support Section Manager
- Statewide Advocacy Support Section



Agenda

- Objectives
- Background
- FI\$Cal Updates
- The “810” Forms
- Submission process, timelines and extensions
- Reporting resources
- Questions and answers
- How to use and read a Data Validation Query (DVQ) demonstration

Objectives

By the end of the training, you should know ...

- Reporting requirements, relevant legislative and audit findings
- The different forms of "CAR"
- How data is captured and reported
- Who to contact with questions
- How to run reports
- Important reporting deadlines

Legal Authorities

SB and DVBE Program Statutes:

- Small Business Procurement and Contract Act - Government Code (Gov. Code), [Section 14835 et seq](#)
- California Disabled Veteran Business Enterprise Program - Military and Veterans Code (MVC), [Section 999 et seq](#)
- Infrastructure-Related Bond Acts of 2006 (IBond) and Infrastructure Investment and Jobs Act Reporting and Small Business Participation: [Section 14838.1](#)

Consolidated Annual Report (CAR) Statute:

- Public Contract Code (PCC) [Section 10111](#)

Mandatory Reporting Departments

What is a “Mandatory Reporting” department?

- All agencies or departments granted [purchasing authority](#) through DGS (primary and secondary)
- Agencies or departments that are under the California Governor’s authority

REPORTING IS MANDATORY

Seeking an exemption?

- Departments should work with their legal counsel to draft a justification citing the legal basis that supports an exemption
 - Concurrence on the exemption from DGS’ Office of Legal Services
 - OSDS does not have the authority to exempt departments or contracts from reporting requirements

Voluntary Reporting Departments

What is a “Voluntary Reporting” department?

- Independent state agencies or departments not granted a purchasing authority through DGS.
- Not under the California Governor’s authority.
- California State Universities, the Lottery Commission, Public Employees Retirement System, State Teachers’ Retirement System, etc.

Encouraged to include SBs and DVBEs in their contracting activities and to report!

Assembly Bill 1574

Assembly Bill 1574 (Chapter 756, Statute of 2021)

- State departments or agencies are to make continuous efforts to expand the pool of certified bidders and regularly seek out and include certified businesses in their solicitations especially if those certified businesses have not contracted with the state before.

Assembly Bill 2974

Assembly Bill 2974 (Chapter 600, Statute of 2022)

- All state departments or agencies that award a new contract that is over \$500,000 and financed, in whole or part, with federal Infrastructure Investment and Jobs Act (IIJA) funds, **shall** establish a 25% SB participation goal on those contracts.
- Exemptions are permitted in certain situations and must be approved by the head of a state department or their designee ([DGS PD 810Ae.](#))
- **Management Memo No. 24-02:** [Small Business Participation, wholly or partly, funded by the Federal Infrastructure Investment and Jobs Act \(IIJA\)](#)

Assembly Bill 2019

[Assembly Bill 2019 \(Chapter 730, Statute of 2022\)](#)

- Codified the 25% SB participation goal.
- DGS to consider appropriate remedial actions if a mandatory reporting department fails three out of five reporting years to meet SB or DVBE goals. Include but are not limited to removal of a department's delegated contract authority or placement of additional restrictions on contracting activities.
- **BB. No. P-12-22 - SUBJECT:** Economic Equity for Small Business (SB) and Disabled Veteran Business Enterprise (DVBE) Firms and Diversity Among State Contractors

In Focus - Summary of Recent Legislation Impacting SB/DVBE and State Strategies on OSDS website!

DVBE Program Audit 2018-114

Audit recommendations/requirements:

1. An increase in reporting accuracy, including a way to strengthen departmental review and verification.
2. A way to ensure reporting was consistent between departments.
3. Decision that reporting to be based on initial award amounts, including multiyear contracts (front loading).

Implementation of reporting in FI\$Cal did the following:

1. Eliminated paper submittals. The system is fully automated to capture procurement and contracting data.
2. Met audit recommendations/requirements:
 - Data Validation Query (DVQ) for departments to verify and approve their procurement or contracting transactions.
 - Addressed reporting inconsistencies by automatically calculating transactions based on award totals and front-loaded multiyear contracts.
 - Increased accuracy in reporting and reduced human error with paper submittals.

FI\$Cal Update: ERGSO Report Automation

Form 810E: Ethnicity, Race, Gender and Sexual Orientation (ERGSO) Report Automation

- Added to FI\$Cal in September 2025.
- Diversity data and awarded dollar amounts automatically aggregated from FI\$Cal procurement modules and vendor profiles in Cal eProcure.
- Voluntary diversity information will not be available, accessible, viewable or reportable at the transaction level, only at an aggregate level for departments and the state.
- Departments who enter transactions into FI\$Cal and/or SCPRS will no longer use the ERGSO Data Entry Page for Form 810E reporting.

Background, Legislation and FI\$Cal Update Recap

- Legal authorities behind the SB, DVBE Programs and reporting for CAR
- Mandatory and Voluntary reporting departments
- Relevant legislation
 - Make continuous efforts to expand pool of certified bidders and regularly seek out certified businesses that have not contracted with the state before (AB 1574)
 - Codified 25% SB participation (AB 2019)
 - DGS to consider appropriate remedial actions to be taken if a mandatory reporting department fails three out of five reporting years to meet the SB or DVBE goals (AB 2019)
- DVBE Program Audit recommendations and requirements
- FI\$Cal Update – ERGSO (Form 810E) Automation

Consolidated Annual Report (CAR)

Includes five different reports that FI\$Cal will automatically generate:

- Form 810 – Contracting Activity Report
 - Generates a Data Validation Report/Query
- Form 810S – SB Option, DVBE Option and DVBE Incentive Report
- Form 810C – Consulting Services Report
- Form 810E – Ethnicity, Race, Gender and Sexual Orientation Report (ERGSO)
- Form 810A – Infrastructure Bonds of 2006 (IBond) / Infrastructure Investment and Jobs Act (IIJA) Report
 - Generates a Data Validation Report/Query

Data Validation Query (DVQ)

- A list of contracts, purchase orders and PCard transactions entered in FI\$Cal as well as entries entered in the State Contract & Procurement Registration System (SCPRS).
- Populated when a user runs a report for the Form 810 or 810A.
- Can be used for the following:
 - Review approved FI\$Cal and SCPRS transactions for accuracy
 - Review data entered into the subcontracting page for accuracy
 - Monitor SB and DVBE participation goals
 - Validate calculated results for Form 810, 810A and 810S
- Job aids are available on how to obtain the DVQ and properly filter the columns to validate the calculations on all 810 forms.

Form 810: Contracting Activity Report

Report ID: RPTPO130

FORM 810 Contracting Activity Report

Agency:

CAR Categories

Contracting Activity Category	Part 0 Total State Contracting Activity				Part 1 Certified Disabled Veteran Business Enterprise (DVBE) Participation in State Contracting Activity															
	Total Contract*		Share of Total Contract		Total to DVBE Prime Contractors		Total to DVBE Sub-Contractors			Total to DVBE Prime & Sub-Contractors			Percentage of Total DVBE Contracts (Column D / Column A)		Share of DVBE Contracts by Activity					
	Awarded Amount \$	Number of Contracts #	Share of Dollars Awarded %	Share of Number of Contracts %	Awarded Amount \$	Number of Contracts #	Awarded Amount \$	Number of Sub-Contracts awarded to DVBE #	Number of contracts with DVBE Sub-contractors #	Awarded Amount \$	Total Number of DVBE Contracts #	Number of Contracts with DVBE Participation (Prime or Sub) #	DVBE Participation %	Contracts with DVBE Participation in All Contracts %	Dollars Awarded %	Number of Contracts %				
	A	B	AN	BN	C	D	E	F	FM	G (C+E)	H (D+F)	HM (D+FM)	I (G/A)	J (HM/B)	GN	HN				
1. Goods (Non-IT)	A1	B1	AN1	BN1	C1	D1	E1	F1	FM1	G1	H1	HM1	I1	J1	GN1	HN1				
2. Services** (Non-IT)	A2	B2	AN2	BN2	C2	D2	E2	F2	FM2	G2	H2	HM2	I2	J2	GN2	HN2				
3. Construction (Non-IT Services -Public Works)	A3	B3	AN3	BN3	C3	D3	E3	F3	FM3	G3	H3	HM3	I3	J3	GN3	HN3				
4. IT (Goods & Services)	A4	B4	AN4	BN4	C4	D4	E4	F4	FM4	G4	H4	HM4	I4	J4	GN4	HN4				
5. Cal-Card Transactions	A5	B5	AN5	BN5	C5	DVBE Participation						I5	J5	GN5	HN5					
TOTALS	A6	B6	AN6	BN6	C6	DVBE Participation						I6	J6	GN6	HN6					
Total awards					# DVBE Firms Awarded - Prime				# DVBE Firms Awarded - Sub				# Awards by DVBE Cert ID - Prime				# Awards by DVBE Cert ID - Sub			
					CR14				EF14				GH14				IJ14			

Column I displays the DVBE participation achieved!

Form 810: Contracting Activity Report

Total to SB/MB Prime and Sub Contractors						Percentage of Total SB/MB Contracts			
Awarded Amount \$		Number of Contracts with SB/MB participation (Prime or Sub) #		Number of SB/MB Contracts #		SB/MB Participation %		Contracts with SB/MB Participation in All Contracts %	
Q (M+O)		RM (N+PM)		R (N+P)		S (Q/A)		T (R/B)	
		SB	MB	SB	MB	SB	MB	SB	MB
1,493.35	45,138.52	3	8	3	8	0.31%	9.24%	11.54%	30.77%
16,976,034.82	309,608.16	2	7	2	6	40.97%	0.75%	10.53%	31.58%
0.00	0.00	0	0	0	0	0.00%	0.00%	0.00%	0.00%
9,094.37	24,642.57	1	2	1	2	6.95%	18.84%	3.57%	7.14%
0.00	0.00					0.00%	0.00%		
16,986,622.54	379,389.25					40.39%	0.90%	8.22%	21.92%
17,366,011.79		SB Participation				41.29%			30.14%

Column S displays the SB participation achieved!

What Should Get Reported on a Form 810?

- All purchase orders, Pcard purchases and contracts

This Includes:

- Emergency contracts
- All contracts issued by DGS or any other department on the reporting department's behalf.
- All standalone POs.
- All POs off of Leveraged Procurement Agreements (LPA).
- All POs off of Design Build Contracts.
- All amendments, alterations, change orders, and extensions that change the total amount by more than \$1.00.
- All state funds, including in mixed funded contracts.

How Does FI\$Cal Capture and Report Data?

- **Departmental contracts** are captured at the contract level and purchase orders off those contracts are excluded from the report.
- **Standalone purchase orders** are included in the report.
- **Purchase orders off of LPAs** are included in the report.
- **Design-Build contracts** captures data at the PO level, not contract level.
 - Note: The design-build functionality in FI\$Cal is not to be used to circumvent any procurement or reporting requirements.
- **Cal Card (PCard)** transactions that were not reported yet.
 - Note: Departments that have unreported PCard transactions must use the PCard FY Summary Entry Page.

PCard FY Summary Entry Page

[Favorites](#) | [Main Menu](#) | [FISCAL Processes](#) > [FISCAL Extension](#) > [PO](#) > [PCard FY Summary Entry](#)

Contract Activity Report (CAR) - PCard FY Summary Entry

Instructions for Non-FISCAL Departments:

Enter the value of all Cal-Card transactions for goods, services, construction, and IT goods and services that have not been reported in SCPRS, regardless of the transaction dollar amount. The values entered for the fiscal year will be reported in the Contracting Activity Report (CAR) Form 510

Business Unit 3100 Exposition Park

One row per fiscal year!

Fiscal Year	Total PCard Dollars	Total Dollars to DVBE	Total Dollars to MB	Total Dollars to SB	Last Updated By	Last Update Date/Time
1 2018-2019	80,000.00	2,500.00	1,500.00	18,000.00	Jon Tugade	12/19/18 3:31:00PM
2 2017-2018	90,000.00	2,000.00	1,000.00	21,000.00	Jon Tugade	12/19/18 3:31:00PM

[Save](#) | [Return to Search](#) | [Previous in List](#) | [Next in List](#) | [Notify](#)

How are New Transactions Captured?

- Contracts
 - Contract start date determines what fiscal year it is reported in
 - And the contract's status is "Approved"
- Purchase Orders
 - PO's dispatch date determines what fiscal year it is reported in
 - And the PO's status is "Dispatched"
- SCPRS
 - SCPRS PO start date determines what fiscal year it is reported
 - And the PO's status is "Approved"

IMPORTANT: For transactions entered in between July 1 and Oct. 1 (or by the set extension date), the reported fiscal year is determined based on the start date of those purchase orders or contracts.

How are Amendments and Change Orders Captured?

- Users must enter intended reporting fiscal year in the Reason Code page.
 - Fiscal year selection in the Reason Code Page will default to the current fiscal year.
- Contracts
 - Determined by selected fiscal year
 - Only applies once the status is "Approved"
- Purchase Orders
 - Determined by selected fiscal year
 - Only applies once the status is "Dispatched"
- SCPRS
 - Determined by selected fiscal year
 - Only applies once the status is "Approved"

The screenshot displays the 'Reason Code Page' interface. At the top, it says 'Enter a reason code and comment for making changes that are being tracked.' Below this, there are fields for 'Unit 8880', 'PO ID', 'Reason Code' (with a search icon), and 'Fiscal Year'. A dropdown menu is open for the 'Fiscal Year' field, showing a list of fiscal years from 2015-2016 to 2026-2027. The year '2019-2020' is currently selected and highlighted in blue. Below the dropdown is a large text area for 'Comment'. At the bottom of the page, there are three buttons: 'OK', 'Cancel', and 'Refresh'.

Reporting Categories

Four 810 CAR reporting categories correspond to FI\$Cal Acquisition Types

Category	Acquisition Type	Acquisition Sub-type
Non-IT Goods	Non-IT Goods	All
Non-IT Services	Non-IT Services	All except Public Works
Construction	Non-IT Services	Public Works
IT (Goods, Services)	IT Goods, IT Services, and Telecom	All

Note: Acq. Sub-type is a required field when Non-IT Services Acq. Type is selected

- PCard transactions are collected in their own category.

Certification Types and SB/DVBE Participation Goals

DVBE	SB	Micro SB designation	SB-PW	NVSA
DVBE goal	SB goal	SB goal	SB goal on public works transactions only	SB goal

- SB-PW are counted under SB participation only on Public Works contracts/projects! Public Works or the SB 605 related public works Acquisition Sub-type must be selected.
- Firms with both SB and DVBE certifications count toward both goals!
- FI\$Cal first checks for SB(Micro), then SB, then SB-PW (PW sub-types only) when determining SB participation credit.

Helpful Links to find Certified Firms:

- [Cal eProcure](#)
- [SB/DVBE Emergency Registry](#)

Contract Activity Report – Form 810 Section

- CAR Reportable Section is available for all new transactions from the contract, purchase order and SCPRS entry modules.
- Dropdown menu allows for users to select “Yes” or “No” for a transaction to be reported for CAR.
 - All transactions will be shown on the DVQ.
 - By selecting “Yes,” the “Add Subcontracting and SB/DVBE Contracting” link becomes available. The entry field for the percentage of state funds and the checkbox used to mark a transaction as exempt from the DVBE Incentive will appear.
- Job Aid FISCal.464 – Completing CAR Reportable Section can be downloaded from the [FI\\$Cal Learning Center](#).

Contract Activity Report (CAR) - Form 810 ?

CAR Reportable Yes ▾ Add Subcontracting and SB/DVBE Contracting Design Build Contract - Report Associated PO(s) only

Statewide Incident ID Statewide Incident Description

Mission Task ID Mission Task Description

Percent of State funds in Total contract, if available/known % Check if exempt from DVBE Incentive

What is Not CAR (Form 810) Reportable?

- 100% federally funded contracts or procurements
- Agreements or procurements with the federal government (including grants)
- Agreements or procurements with any state or local government
- Agreements or procurements with the California Correctional Training and Rehabilitation Authority (CALCTRA)
- Interagency Agreements
- Joint Powers Agreements
- Agreements with California State Universities (CSU)
- Agreements with Universities of California (UC)
- Loans, local assistance or subvention agreements
- Any court-ordered settlements or costs
- Real estate/property leases
- Contracts or procurements that are, **by law**, not required to be captured for CAR

To see more about what is or is not reportable, click the  symbol within the CAR Reportable Section.

Subcontracting and SB/DVBE Contracting

- Subcontractor information can be added in the contract, purchase order, PCard and SCPRS entry modules.
- After selecting CAR Reportable **"Yes,"** a pop-up window will ask if there is any subcontracting information that needs to be provided.
- If subcontractors need to be reported, open this page and:
 - Verify the prime contractor and its certification (if applicable) populated correctly
 - Add subcontractors and enter the percentage of work that the subcontractor will be performing. Subcontractor certification information will automatically populate.
- The subcontractor page can be revisited by selecting the "View/Edit Subcontracting and SB/DVBE Contracting" link.

Contract Activity Report (CAR) - Form 810 ?

CAR Reportable Design Build Contract - Report Associated PO(s) only

Statewide Incident ID Statewide Incident Description

Mission Task ID Mission Task Description

Percent of State funds in Total contract, if available/known % Check if exempt from DVBE Incentive

Adding Subcontractors

Custom Page for SB/DVBE

SB/DVBE Contracting

Business Unit: 7760
PO ID: 0000015570

Add subcontractors

Enter subcontractor percentage. Should match bid documents.

	Supplier Search	Supplier ID	Doing Business As Name	Certification Number	Percentage	Prime	Sub	SB	MB	SB/MB Start Date	SB/MB Exp Date		
1	+	Supplier Search	0000000297	NWNCORPORA-001	97.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
2	+	-	Supplier Search	0000004530	GLOBAL BLUE DVBE INC	1567640	<input type="text" value="2.00"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	03/06/2017	03/31/2019
3	+	-	Supplier Search	0000021295	SHADE & PUTNAM TECHNOLOGY SOLUTIONS	1747904	<input type="text" value="1.00"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	09/10/2018	09/30/2020

OK Cancel Refresh

Personalize | Find | First 1-3 of 3 Last

SB-PW	SB-PW Start Date	SB-PW Exp Date	DVBE	DVBE Start Date	DVBE Exp Date	NVSA	NVSA Start Date	NVSA Exp Date
<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
<input type="checkbox"/>			<input checked="" type="checkbox"/>	03/06/2017	03/31/2019	<input type="checkbox"/>		
<input type="checkbox"/>			<input checked="" type="checkbox"/>	09/19/2018	09/30/2020	<input type="checkbox"/>		

Statewide Emergency and Mission Task Transactions

- Four optional data entry fields to capture emergency transactions assigned by the California Office of Emergency Services (CalOES)
 - Always visible and can be filled out regardless if a transaction is reportable for CAR.
 - Very important to complete. Captures departments' spending toward emergencies.
- If an emergency acquisition method is chosen for a transaction, a warning message will appear reminding users to enter in the Statewide Incident and/or Mission Task IDs.
- More guidance can be found here: [CalOES Mission Task and Statewide Incident IDs Training](#).

Contract Activity Report (CAR) - Form 810 ?

CAR Reportable View/Edit Subcontracting and SB/DVBE Contracting Design Build Contract - Report Associated PO(s) only

Statewide Incident ID Statewide Incident Description

Mission Task ID Mission Task Description

Percent of State funds in Total contract, if available/known % Check if exempt from DVBE Incentive

Percentage of State Funds and DVBE Incentive Exemption

Percentage of state funds

- Enter the percentage of state funds if a transaction also has federal funds.
 - If the transaction is 100% funded by state funds, enter in 100% or leave blank.
- FI\$Cal will automatically calculate and capture reportable CAR amount and SB or DVBE participation amounts (if applicable) based on the entered percentage.

Exempt from DVBE Incentive

- Mark checkbox if the department has an approved DVBE Incentive Exemption (STD 816) or the acquisition method is SB or DVBE Option or another non-competitive method
- Transaction information will not be captured on the Form 810S.

Contract Activity Report (CAR) - Form 810 ?

CAR Reportable View/Edit Subcontracting and SB/DVBE Contracting Design Build Contract - Report Associated PO(s) only

Statewide Incident ID Statewide Incident Description

Mission Task ID Mission Task Description

Percent of State funds in Total contract, if available/known % Check if exempt from DVBE Incentive

Design Build Contracts and Design Build POs

- In the CAR Reportable section, the “Design Build Contract – Report Associated PO(s) only” checkbox will allow users to identify Design-Build contracts for CAR reporting purposes.

Contract Activity Report (CAR) - Form 810 ?

CAR Reportable Yes ▾ Add Subcontracting and SB/DVBE Contracting Design Build Contract - Report Associated PO(s) only

Statewide Incident ID Statewide Incident Description

Mission Task ID Mission Task Description

Percent of State funds in Total contract, if available/known % Check if exempt from DVBE Incentive

- Any PO associated with a Design Build Contract will display a message indicating that the reported information is captured at the PO level.

Contract Activity Report (CAR) - Form 810 ?

CAR Reportable Yes ▾ Add Subcontracting and SB/DVBE Contracting Design Build Contract - Report Associated PO(s) only

For the purpose of CAR, this Design Build Contract is reported at the PO level.

Statewide Incident ID Statewide Incident Description

Mission Task ID Mission Task Description

Percent of State funds in Total contract, if available/known % Check if exempt from DVBE Incentive

Form 810: Contracting Activity Report Recap

- The CAR Reportable Section in FI\$Cal is what the system looks at for calculating the totals for the Form 810!
 - All contracts, purchase orders and PCard purchases must be captured for the report
- Four main reporting categories
- Accuracy is key!
 - CAR "Y" versus "N"
 - Subcontracting information
 - Percentage of state funds
 - Statewide Incident IDs and Mission Task IDs
- FI\$Cal automatically generates Form 810, including participation SB and DVBE amounts
- Departments should review DVQ for transaction accuracy and participation status

Up Next – 810S: SB Option, DVBE Option and DVBE Incentive Report!

Form 810S: SB Option, DVBE Option and DVBE Incentive Report

Form 810S (Supplemental Report) STATE OF CALIFORNIA - DEPARTMENT OF GENERAL SERVICE
PROCUREMENT DIVISION

Report ID: RPTPO130

Form 810 S SB Option, DVBE Option and DVBE Incentive Report

AGENCY:		Fiscal Year:	
		DEPARTMENT:	
SB Option			
Part 1	Total Contract Dollars Awarded as a Result of Option	Number of Contracts Awarded	Public Contract Code 10111 Section (c) amounts awarded annually pursuant to Section 10000 (a) and 10000 (b) of the Government Code to Small Businesses, and Microbusinesses (SB/MBs).
PC 10111 Mandated	Column A	Column B	
	\$0.00	0	
DVBE Option			
Part 2	Total Contract Dollars Awarded as a Result of Option	Number of Contracts Awarded	Public Contract Code 10111 Section (e) amounts awarded annually pursuant to Section 10000 (a) of the Government Code to Disabled Veteran Business Enterprises (DVBEs).
PC 10111 Mandated	Column A	Column B	
	\$0.00	0	
Comments:			
DVBE Incentive			
Part 3	Total Contract Dollars Awarded as a Result of DVBE Incentive	Number of Contracts Awarded as a Result of DVBE Incentive	This report (Part 3) captures DVBE participation on contracts awarded using the DVBE Incentive pursuant to Military and Veterans Preference Act (MVP) and includes the total contract dollars awarded and the number of contracts awarded. If the collection system cannot identify contract as DVBE Incentive, indicate that in the comments below.
MVC 999.5	Column A	Column B	
	\$0.00	0	
Comments:			
Approver's Information:			
Name:		Title:	
Signature:		Date:	
Telephone:		Fax:	
Email:		City & Zip:	
Notes:			

- Acquisition Method - SB Option
- Acquisition Method - Public Works SB Option

- Acquisition Method - DVBE Option
- Acquisition Method - Public Works DVBE Option

- DVBE Incentive Checkbox left unchecked
- Contracts awarded using a DVBE Incentive

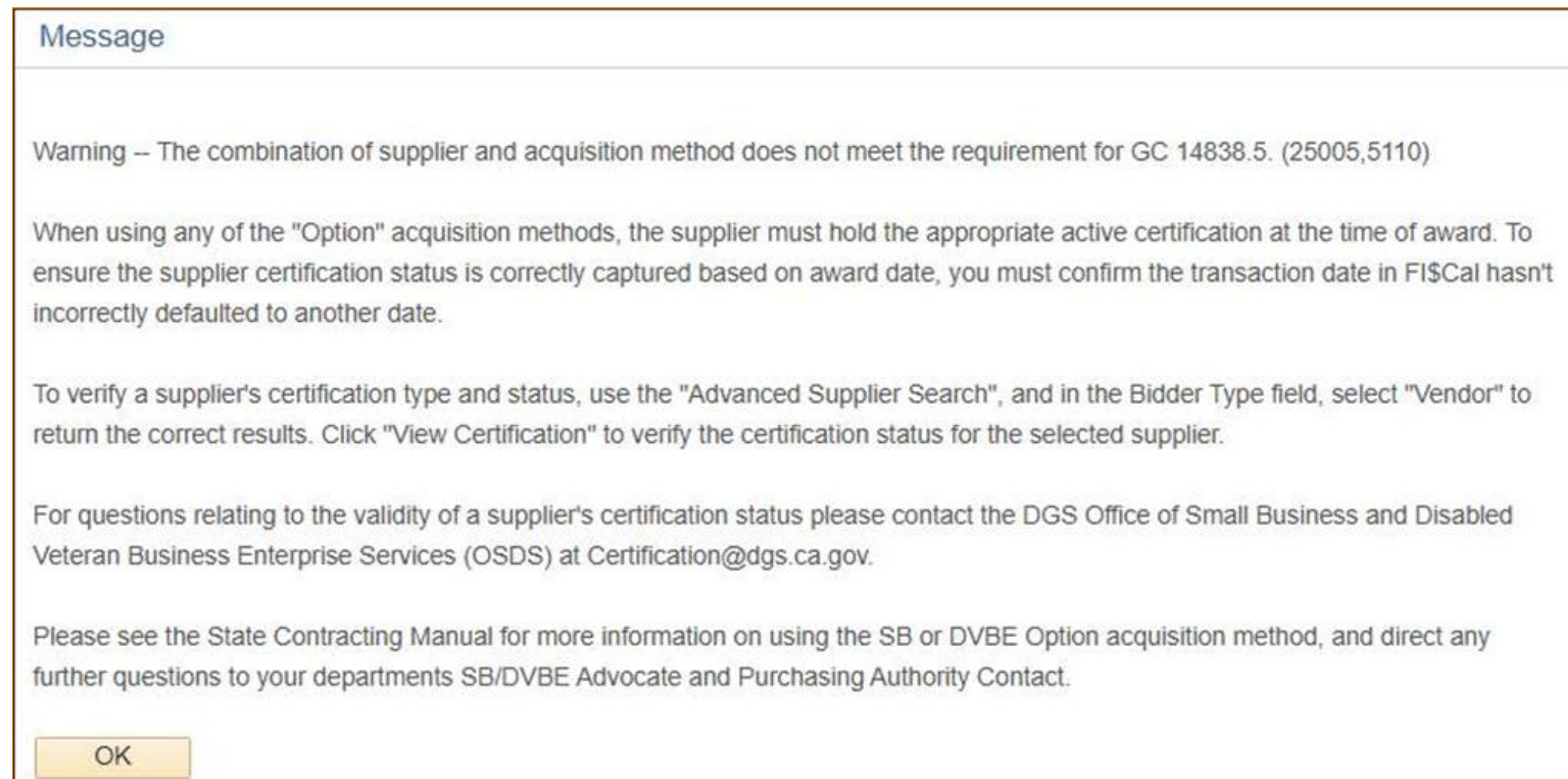
SB or DVBE Option Acquisition Methods

- Allowed by Government Code Section 14838.5
 - Contracts may be awarded for goods, services or IT valued from \$5,000.01 to \$249,999.99 to a certified SB or DVBE, if price quotations are obtained from two or more certified SB/MBs or two or more DVBEs.
- SB or DVBE Option for Public Work Contracts:
 - Maximum threshold increased to \$484,000.
- State Contracting Manual, Vol. 2, [SB/DVBE Option - 1405.3](#)

When using an SB or DVBE Option, the prime contractor or supplier must be certified at the time of award!

SB or DVBE Option Acquisition Methods

If a non-certified business is selected with an SB Option, Public Works SB Option, DVBE Option or DVBE Option – Public Works Acquisition Method, FI\$Cal will generate a pop-up window warning buyers that the selection cannot be made.



DVBE Incentive and DVBE Incentive Exemptions

- Military and Veterans Code Section 999.5, subdivision (a) applies to all competitive solicitations, unless a DVBE Incentive exemption is approved.
- BB. No. P-08-20 - SUBJECT: DVBE Incentive Exemption Regulation Update & DVBE Exemption Request Form (STD 816)
- More information can be found in SCM, Vol. 2, Exemptions to the DVBE Incentive Requirement - 1202.1
- Mark the **Check if exempt from DVBE Incentive** box if:
 - Departments receive approval on an STD 816.
 - The Acquisition Method is SB or DVBE Option or other noncompetitive acquisition method.

Contract Activity Report (CAR) - Form 810 ?

CAR Reportable View/Edit Subcontracting and SB/DVBE Contracting Design Build Contract - Report Associated PO(s) only

Statewide Incident ID Statewide Incident Description

Mission Task ID Mission Task Description

Percent of State funds in Total contract, if available/known % Check if exempt from DVBE Incentive

Form 810S: SB Option, DVBE Option and DVBE Incentive Report Recap

- FI\$Cal automatically generates DGS PD 810S based on transactions that were awarded through an SB or DVBE Option Acquisition Method
 - Acquisition Method – SB Option
 - Acquisition Method – Public Works SB Option
 - Acquisition Method – DVBE Option
 - Acquisition Method – Public Works DVBE Option
- Accuracy is key!
- Supplier must be certified at the time of award!
- DVBE Incentive Checkbox in CAR Reportable Section

Up Next – A quick break and then the Form 810C: Consulting Services Report.

Form 810C: Consulting Services Report

Form 810C (Consulting Services Report)

STATE OF CALIFORNIA - DEPARTMENT OF GENERAL SERVICE
PROCUREMENT DIVISION

Form 810C Consulting Services Report

Agency:												Fiscal Department:	
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Line #	Transaction ID #	Report Codes & Amounts									Contractor's Name	Contractor's ID #	Number of Bids	Contract Action Dates				Consulting Services Justification			Explanation
		Entered \$	Acquisition Method Code	Low Bid Y/N	Amended \$	Acquisition Method Code	Low Bid Y/N	Completed \$	Acquisition Method Code	Low Bid Y/N				Signed	Work Started	Work Amended	Work Completed	Contract Purpose	Beneficiary	Justification	
0													0								

REPORT CODES & AMOUNTS SUMMARY									
	Total Amount \$	Total Contract Number #	Low Bid		Acquisition Method Code			Total CMAS & MSA	
			Y	N	3 - Non Competitive Bid	4 - California Multi Award Schedule	5 - Master Service Agreement		
Entered	0.00	0	0	0	0	0	0	0	
Amended	0.00	0	0	0	0	0	0	0	
Completed	0.00	0	0	0	0	0	0	0	

Approver's Information			
Name:			Title:
Signature:			Date:
Telephone:			Fax:
Email:			City & Zip:
Notes:			

Acquisition Method Code

- 1 - Competitive Others
- 2 - Formal Competitive
- 3 - Non Competitive Bid
- 4 - California MultiAward Schedule
- 5 - Master Service Agreement
- 6 - Emergency
- 7 - Others

Note: Not all acquisition methods are captured in 810C

Acquisition Method Codes

Consulting Services Justification Window

Consulting Services

Header ?

*Contract Style

Process Option

*Acquisition Type

*Acquisition Method

SetID: STATE Contract ID: NEXT

Consulting Service Justification

*Number of Offers:

*Purpose:

*Potential Beneficiaries: 🔍

Low Bid Not Accepted Reason: 🔍

*Justification: 🔍

Id Comments and Attachments Activity Log

Consulting Services Justification

Acquisition Sub -Type 🔍

Favorites > Main Menu > FI\$Cal SCPRS > FI\$Cal SCPRS Data Entry

New Window

SCPRS Entry

Report SCPRS Order

Business Unit *Purchase Order Date 📅 *DGS Billing Code 🔍 Change Order

Purchase Document # Change Order Reason

CalCard: Blanket PO: Grand Total Sub-Total

*Acquisition Type 🔍

Acquisition Sub -Type 🔍

*Acquisition Method 🔍

Department

IBond 🔍

Consulting Service Justification

*Number of Offers

*Purpose

*Potential Beneficiaries 🔍

*Low Bid Not Accepted Reason 🔍

*Justification 🔍

Acquisition Method Codes and Explanation Fields

Acquisition Method Code

- 1 - Competitive Others
- 2 - Formal Competitive
- 3 - Non Competitive Bid
- 4 - California MultiAward Schedule
- 5 - Master Service Agreement
- 6 - Emergency
- 7 - Others

Note: Not all acquisition methods are captured in 810 C

Look Up Low Bid Not Accepted Reason:

Low Bid Not Accepted Reason

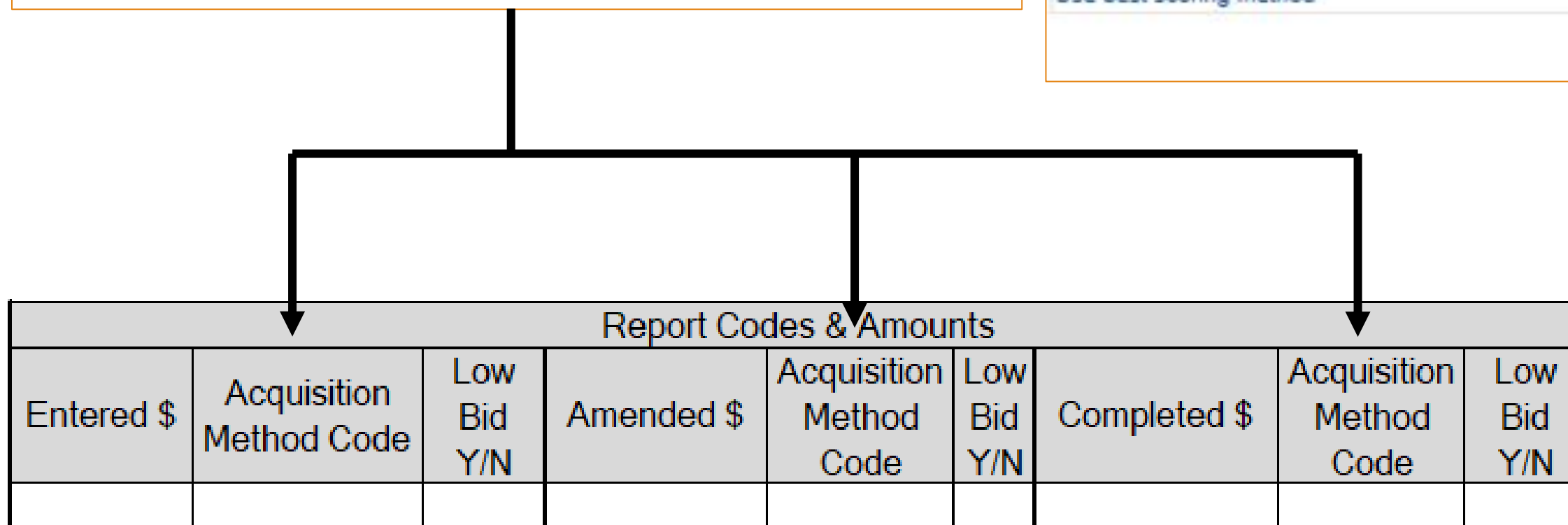
Search Results

View 100 First 1-7 of 7 Last

Low Bid Not Accepted Reason
Best value criteria meets needs at reasonable costs
Emergency Acquisition for the protection of the public
N/A - Low Bid Accepted
N/A - Non Competitive Bid (NCB)
Only goods and services that meet the needs of the State
SB/DVBE Option
Use best scoring method

Low Bid Not Accepted Reason Field:

- FI\$Cal will capture whether a transaction is a non-competitively bid contract (NCB), in the Explanation Section.
- Reasons for not accepting the low bid will appear in the Explanation Section.



Explanation
Use best scoring method
Only goods and services that meet the needs of the State, Amendment Added - For Time
Best value criteria meets needs at reasonable costs, Data Entry Error Corrected

What is a Consulting Service?

- Consulting services contracts are defined within PCC Section 10335 et seq. and they:
 - Are advisory in nature and provide a recommended course of action or personal expertise.
 - Have an end product that is basically a transmittal of information either written or verbal.
 - Have a final product that may include answering specific questions to design of a system or plan, or workshops, seminars, retreats and conferences.
 - Include expert witness contracts and contracts for legal services ([PCC, § 10335.5](#))

What should not be captured on the Form 810C?

- What is not considered a “consulting services” contract is defined within [PCC Section 10335 et seq.](#) and includes:
 - Contracts between a state agency or department and a local agency or the federal government.
 - Contracts with local agencies, as defined in [Revenue and Taxation Code Section 2211](#), to subvene federal funds for no matching state funds are required.
 - Architectural and Engineering (A&E) contracts per Chapter 10 (commencing with 4525) of division 5 of Title 1 of the Government Code.

FI\$Cal automatically ensures that transactions that do not have the “Consulting Service(s)” Acquisition Sub-type do not get captured!

Form 810C: Consulting Services Report Recap

- FI\$Cal automatically pulls consulting service contract information from transaction and Consulting Services Justification window.
- Accuracy is key!
 - Acquisition Sub-type – Consulting Service(s)
 - Do not leave Acquisition Sub-type field blank
 - Complete Consulting Services Justification window
- Consulting service(s) defined according to PCC Section 10335 et seq.

Up Next – 810E: Ethnicity, Race, Gender and Sexual Orientation report

Form 810E: ERGSO Report

STATE OF CALIFORNIA
 Ethnicity, Race, Gender, and Sexual Orientation (ERGSO) Report
 DGS PD 810E formerly GSPD 810E (REV 3/2026)

DEPARTMENT OF GENERAL SERVICES
 PROCUREMENT DIVISION

Form 810 E : Ethnicity, Race, Gender, Sexual Orientation (ERGSO) Report

Agency:	Department:			
Fiscal Year:	All Contracts			
	Goods Column A	Services Column B	Construction Column C	Totals Column D
Part 1	Ethnicity Classifications			
	Asian-Indian			\$0
	Black			\$0
	Hispanic or Latino			\$0
	Non-Hispanic or Non-Latino			\$0
	Native American			\$0
	Pacific Asian			\$0
	Other (specify)			\$0
TOTALS	\$0	\$0	\$0	\$0
Part 2	Race Classifications			
	American Indian or Alaska Native			\$0
	Asian			\$0
	Black or African American			\$0
	Native Hawaiian or Other Pacific Islander			\$0
	White			\$0
	Two or more races			\$0
	Other (specify)			\$0
TOTALS	\$0	\$0	\$0	\$0
Part 3	Gender			
	Female/Woman			\$0
	Male			\$0
	Non-binary			\$0
	Other Gender Identity (specify)			\$0
TOTALS	\$0	\$0	\$0	\$0
Part 4	Sexual Orientation			
	Lesbian			\$0
	Gay			\$0
	Bisexual			\$0
	Transgender			\$0
	Other LGBTQIA (specify)			\$0
TOTALS	\$0	\$0	\$0	\$0

- Reports on voluntarily provided diversity information from business owners.
- The diversity information is split into three primary contracting categories:
 - Goods
 - Services
 - Construction
- Those contracting categories are split up by diversity categories:
 - Ethnicity
 - Race
 - Gender
 - Sexual orientation

Form 810E: ERGSO Report Automation

Departments that use FI\$Cal and/or SCPRS:

- Automated for departments that record their transactions in FI\$Cal and/or SCPRS!
 - DGS PD 802 – Voluntary Statistical Data Sheets no longer needed.
 - Contract and/or award notification language should be updated to encourage vendors to keep their Cal eProcure profiles up to date, including their diversity information.
- FI\$Cal will automatically calculate totals for all diversity categories and contracting categories.
 - Voluntary diversity information will not be available, accessible, viewable or reportable at the transaction level, only at an aggregate level for departments and the state.

Form 810E: ERGSO Report Manual Submission

Departments that DO NOT USE FI\$Cal and/or SCPRS:

- Must send DGS PD 802 – Voluntary Statistical Data Sheets to suppliers:
 - Contract and/or award notification language should encourage vendors to return the completed DGS PD 802 to the awarding department.
 - Suppliers are not required to submit DGS PD 802 back to awarding department.
- Compile and total all received DGS PD 802s to manually create separate Form 810E copy. Email finalized copy to OSDS by reporting deadline.
- Enter in diversity information into ERGSO Data Entry Pages within FI\$Cal.

DGS PD 802: Voluntary Statistical Data Sheet (VSDS)

VOLUNTARY STATISTICAL DATA SHEET

Information to be used for reporting purposes only

Public Contract Code 10111 requires state agencies to capture information on ethnicity, race and gender (ERG) of business owners on all awarded contracts and procurements to the extent that the information has been voluntarily reported to the department. The awarding department is prohibited from using this data to discriminate or provide a preference in the solicitation or acceptance of bids, quotes, or estimates for goods, services, construction and/or information technology. This information shall not be collected until after the contract award is made. The completion of this form is **strictly voluntary**.

The data you provide on this form should best describe the *ownership of your business*. Ownership of a business should be determined as follows:

- For a business that is a sole proprietorship, partnership, corporation, or joint venture at least 51 percent is owned by one or more individuals in a classification designated below or, in the case of any business whose stock is publicly held, at least 51 percent of the stock is owned by one or more individuals in a designated classification, or
- For other business entities, the owner is the person controlling management and daily operations and who "owns" the business.

For purposes of this report, respond only if the business has its home office in the United States and which is not a branch or subsidiary of a foreign corporation, firm, or other business.

Ethnicity/Minority Classification – As defined in Public Contract Code Section 2051(c)

- Asian-Indian** – a person whose origins are from India, Pakistan, or Bangladesh.
- Black** – a person having origins in any of the Black racial groups of Africa.
- Hispanic** – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race.
- Native American** – an American Indian, Inuk, Aleut, or Native Hawaiian.
- Pacific Asian** – a person whose origins are from Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Trust Territories of the Pacific including the Northern Marianas
- Other** – Any other group of natural persons identified as minorities in the respective project specifications of an awarding department or participating local agency.

Race Classification – As defined by the Office of Management and Budget, Federal Register Notice, October 30, 1997, at <https://www.whitehouse.gov/wp-content/uploads/2017/11/Revisions-to-the-Standards-for-the-Classification-of-Federal-Data-on-Race-and-Ethnicity-October30-1997.pdf>

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White
- Other

Gender Classification

- Female
- Male
- Transgender

Sexual Orientation Classification – As defined by Public Contract Code 10111(f)

- Lesbian
- Gay
- Bisexual

ITEMS BELOW TO BE COMPLETED BY STATE AGENCY/DEPARTMENT ONLY

- Goods
- Services
- Construction

Total Contract Purchase: _____

Contract Award Date: _____

- Departments must identify and enter in the contracting category, total contract purchase (award) amount and the contract award date.

DGS PD 802: VSIDS Maintenance

Departments that DO NOT USE FI\$Cal and/or SCPRS:

- The DGS PD 802 - Voluntary Statistical Data Sheet (VSIDS) or any information collected on the form **must** be saved and maintained separately from the contracting or procurement file!
 - Information is provided voluntarily by business owners and must be maintained in a confidential nature.
 - Maintains the integrity of the procurement process as the information on the VSIDS should have no influence on the final contract or procurement award.
- [Job Aids](#) are available to help guide users on where to go to enter in diversity information.

ERGSO Data Entry Page

Favorites ▾ Main Menu ▾ > FISCal SCPRS ▾ > ERGSO Data Entry

ERGSO Entry Page

Business Unit 6630 CSU Systemwide Offices

Ethnicity, Race, Gender, and Sexual Orientation (ERGSO) Find | View 1 First 1-2 of 2 Last

*Award Amount *Award Date 10/27/2021 *Contract Type

Ethnicity

Asian-Indian	Black	Hispanic	Native American	Pacific Asian	Other (specify)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Race - Check all that apply

American Indian or Alaska Native	Asian	Black or African American	Native Hawaiian or Other Pacific Islander	White	Other (specify)	Multiracial (check all that apply)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>

Gender

Male	Female	Transgender	Other (specify)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Sexual Orientation

Lesbian	Gay	Bisexual
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*Award Amount *Award Date 10/27/2021 *Contract Type

Ethnicity

Asian-Indian	Black	Hispanic	Native American	Pacific Asian	Other (specify)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Race - Check all that apply

American Indian or Alaska Native	Asian	Black or African American	Native Hawaiian or Other Pacific Islander	White	Other (specify)	Multiracial (check all that apply)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>

Gender

Male	Female	Transgender	Other (specify)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Sexual Orientation

Lesbian	Gay	Bisexual
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Enter data for another DGS PD 802: VSIDS

Form 810E: ERGSO Report Recap

- Suppliers reporting on their diversity data is voluntary.
- FI\$Cal automatically generates Form 810E based on automated reporting.
- Temporary manual 810E submissions required for departments not captured within the automation.
- OSDS Reporting will to combine automated calculations with the manual submissions.
- Suppliers reporting on their diversity data and VSDS must be kept separately from the contracting or procurement file.

Up Next – Form 810A: IBond/IIJA Activity Report

Form 810A: IBond/IIJA Activity Report

STATE OF CALIFORNIA - DEPARTMENT OF GENERAL SERVICES
PROCUREMENT DIVISION

Form 810 A IBond/IIJA Act Report

Run By: DGS SB/DVBE Cert Manager
Run Date: 5/5/23
Run Time: 9:45:50 AM
Report Type: Individual

Agency: General Government		Part 1				Part 2							
IBond/IIJA ID and IBond/IIJA Dollars		Certified Disabled Veteran Business Enterprise (DVBE) Participation				Certified Small Business/Micro Business (SB/MB) Participation							
IBond/IIJA ID*	IBond/IIJA Total Contract \$	IBond/IIJA Total \$ to DVBE Prime Contractors	IBond/IIJA Total \$ to DVBE Sub Contractors	IBond/IIJA Total \$ to DVBE Prime & Sub Contractors	IBond/IIJA Total DVBE %	IBond/IIJA Total \$ to SB/MB Prime Contractors		IBond/IIJA Total \$ to SB/MB Sub Contractors		IBond/IIJA Total \$ to SB/MB Prime & Sub Contractors		IBond/IIJA Total SB/MB %	
	A	B	C	D (B+C)	E (D/A)	F		G		H (F+G)		I (H/A)	
						SB	MB	SB	MB	SB	MB	SB	MB
IIJA Division A	500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IIJA Division B	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IIJA Division E	25,000.00	25,000.00	0.00	25,000.00	100.00	25,000.00	0.00	0.00	0.00	25,000.00	0.00	100.00	0.00
IIJA Division F	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IIJA Division G Title IX	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Prop 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Prop 1B	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Prop 1C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Prop 1D	1,000.00	1,000.00	0.00	1,000.00	100.00	1,000.00	0.00	0.00	0.00	1,000.00	0.00	100.00	0.00
Prop 1E	5,000.00	5,000.00	0.00	5,000.00	100.00	5,000.00	0.00	0.00	0.00	5,000.00	0.00	100.00	0.00
Prop 84	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Grand Total	31,500.00	31,000.00	0.00	31,000.00	98.41	31,000.00	0.00	0.00	0.00	31,000.00	0.00	98.41	0.00

The Small Business Improvement Plan must include an I Bond Action Plan when participation specific to I Bonds is less than 25%.

Comments:

Approver's Information

Name:		Title:	
Signature:		Date:	
Telephone:		Fax:	
Email:		City & Zip:	

SB Participation

IBond/IIJA Reporting Requirements and Exemptions

Government Code §14838.1

- New contracts over \$500,000 financed in whole or part with the proceeds of the Infrastructure Investment and Jobs Act (IIJA).
- 25% Small Business participation goal required.
- Unless an exemption determination is made ([Gov. Code, § 14838.1, subdiv. \(c\).](#))
- An Improvement Plan is required when the 25% SB participation goal for IIJA contracts is not met.

Exemptions:

- A department is responsible for determining which IIJA funded contracts are exempted from the 25% SB participation goal. Completed on the [DGS PD 810Ae](#).
- Report each IIJA exemption to OSDSReports@dgs.ca.gov.

Infrastructure Bond Acts of 2006

- The Highway Safety Traffic Reduction, Air Quality and Port Security Bond Act.
- The Housing and Emergency Shelter Trust Fund Act.
- The Kindergarten-University Public Education Facilities Bond Act.
- The Disaster Preparedness and Flood Prevention Bond Act.
- The Safe Drinking Water, Water Quality and Supply, Flood Control, River and Coastal Protection Bond Act.

Infrastructure Investment and Jobs Acts of 2023

- Division A, The Surface Transportation Reauthorization Act of 2021.
- Division B, The Surface Transportation Investment Act of 2021.
- Division E, The Drinking Water and Wastewater Infrastructure Act of 2021.
- Division F, Broadband.
- Title IX of Division G, the Build America, Buy America Act.

IBond/IIJA Activity Reporting in FI\$Cal

- Check the “Exempt from SB Goal-IIJA only” check box if a contract has been exempted from SB goal.
- As required by law, for each of these exemptions, a DGS PD 810Ae should be submitted to OSDS. OSDS and PD are in the process of vetting the exemption form with the applicable departments.

Contract Entry
Contract

SetID STATE Copy From Contract
Contract ID NEXT
*Status Open
*Contract Type Departmental
View Approvals
Contract Version
Version 1 Status Current
New Version
Submit for Approval
Approval Due Date
Contract Reference
Share Contract
Leased
Financed
GS Smart
Add a Document
Administrator/Buyer
Buyer Details
Buyer Name
Email ID
Phone
Header
*Contract Style Purchase Order
Process Option Purchase Order
*Acquisition Type
*Acquisition Method
*DGS Billing Code
Add Comments and Attachments
Activity Log
LPA Contract ID
IBond/IIJA Prop 1C
The Housing and Emergency Shelter Trust Fund Act
 Exempt from SB Goal-IIJA only

Running a Specific IBond/IIJA Activity Report

- Reports on IBond and IIJA activity can be obtained from the Form 810 Report page in FI\$Cal.

The screenshot shows the 'Form 810 Report' page in the FI\$Cal system. The breadcrumb trail is: Favorites > Main Menu > FISCal Processes > FISCal Report > PO Reports > Form 810 Report. The page title is 'Form 810 Reports'. Below the title, there are links for 'Run Control ID', 'Test', 'Report Manager', 'Process Monitor', and a 'Run' button. The 'Business Unit' is set to '7760' and the 'Department' is 'Department of General Services'. The 'Reporting Period' section has '*CAR Fiscal Year' set to '2022-2023' and 'Fiscal Year to Date' selected. The 'Type of Report' section has 'Individual Business Unit' and 'Exclude Mission Tasks' selected. Below these are 'SelectAll' and 'De-SelectAll' buttons. The main content area contains two tables: 'Statewide Incidents' and 'IBond/IIJA'. The 'IBond/IIJA' table is highlighted with a red box and contains the following data:

Select	IBond/IIJA	IBond/IIJA Description
<input type="checkbox"/>	IIJA Division A	Surface Transportation Reauthorization Act of 2021 (23 U.S.C. Sec. 101 et seq.)
<input type="checkbox"/>	IIJA Division B	Surface Transportation Investment Act of 2021 (49 U.S.C. Sec. 101 et seq.)
<input type="checkbox"/>	IIJA Division E	Drinking Water and Wastewater Infrastructure Act of 2021 (33 U.S.C. Sec. 1251 et seq.)
<input type="checkbox"/>	IIJA Division F	Broadband (47 U.S.C. Sec. 1701 et seq.)
<input type="checkbox"/>	IIJA Division G Title IX	Build America, Buy America Act (41 U.S.C. Sec. 8301 et seq.)
<input type="checkbox"/>	Prop 1	Water Quality, Supply, and Infrastructure Improvement Act of 2014

Form 810A: IBond/IIJA Activity Report Recap

- New contracts over \$500,000 financed in whole or part by IIJA require 25% SB participation goal
 - Improvement Plan is required when the contract-specific 25% SB participation goal for IIJA contracts is not met
- Departments are responsible for determining exemptions, and submitting these on the [DGS PD 810Ae](#)
- Ensure all IBond and IIJA funds are being appropriately reported

Up next – Submitting for CAR and reporting reminders.

Submissions and Corrections

OSDS Reports will pull all reports directly from FI\$Cal after the CAR deadline. There is no need to email the reports to the OSDS, except for departments that need to manually complete a Form 810E.

- Contact OSDS well in advance of the deadline to make corrections.
- OSDS enables access to Intake Pages if it is determined that a manual submission is required.
 - The DVQ will no longer be accessible.
 - Run all 810 form reports and DVQ prior to requesting Intake Pages.
 - Reports will generate as blank until Intake Page submission is complete.
- OSDS and all reporting departments should SAVE all reports they run on the due date or closest to the due date for their own records!

Getting Access to Intake Pages

- Intake Pages are the equivalent of submitting the reports for CAR manually.
- Each department needs to have at least one user that is mapped to the SCPRS Processor role.
- All system access and role mapping must be done between the department/state entity and FI\$Cal.
 - **DGS cannot assist with this process.**
- For more information regarding FI\$Cal access, please visit [End User Access|FI\\$Cal - State of California. One state. One system.](#)

Intake Pages in FI\$Cal

Favorites > Main Menu > FI\$Cal Processes > FI\$Cal Extension > PO > Form 810 - Intake Pages

Form 810 - Intake Page

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ Search Criteria

Business Unit begins with 🔍

Fiscal Year = ▼

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Note: Intake Pages (manual submission) are only allowed on a case-by-case basis and access is granted at the discretion of OSDS Reports.

Intake Pages – Form 810 Total Contracting Activity

[Favorites](#) > [Main Menu](#) > [FI\\$Cal Processes](#) > [FI\\$Cal Extension](#) > [PO](#) > [Form 810 - Intake Pages](#)

[Form 810 Contract Activity](#) | [Form 810S SB/DVBE Options](#) | [Form 810A I-Bond Report](#) | [Form 810C Consulting Services](#)

Fiscal Year: _____
 Business Unit: _____ Modified On: _____
 Modified By: _____

Note: Form 810 have three tabs below. All three tabs must be completed before submitting the report.

Total State Contracting Activity		DVBE Participation		Small Business (SB)/Micro Business Participation	
Contracting Activity Category	Total Awarded Amount \$	Total Number of Contracts #	Share of Dollars Awarded %	Share of Number of Contracts %	
1. Goods (Non-IT)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2. Services (Non-IT)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3. Construction	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4. IT (Goods and Services)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5. Cal Card Transactions	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTALS					

# of Certified DVBE's as Prime	<input type="text"/>	# of Awards to DVBE's as Prime	<input type="text"/>
# of Certified DVBE's as Subs	<input type="text"/>	# of Awards to DVBE's as Subs	<input type="text"/>
# of Certified SB's as Prime	<input type="text"/>	# of Awards to SB's as Prime	<input type="text"/>
# of Certified SB's as Subs	<input type="text"/>	# of Awards to SB's as Subs	<input type="text"/>

| |

Note: Intake Pages (manual submission) are only allowed on a case-by-case basis and access is granted at the discretion of OSDS Reports.

Intake Pages – Form 810 DVBE Participation

[Favorites](#) | [Main Menu](#) | [FI\\$Cal Processes](#) | [FI\\$Cal Extension](#) | [PO](#) | [Form 810 - Intake Pages](#)

[Form 810 Contract Activity](#) | [Form 810S SB/DVBE Options](#) | [Form 810A I-Bond Report](#) | [Form 810C Consulting Services](#)

Fiscal Year: _____
 Business Unit: _____ Modified On: _____
 Modified By: _____

Note: Form 810 have three tabs below. All three tabs must be completed before submitting the report.

[Total State Contracting Activity](#) | [DVBE Participation](#) | [Small Business \(SB\)/Micro Business Participation](#)

Contracting Activity Category	Awarded Amount \$ (Prime)	Number of Contracts # (Prime)	Awarded Amount \$ (Sub)	Number of Sub Contracts Awarded to DVBE #	Number of Contracts with DVBE Sub-contractors #	Awarded Amount \$ Prime or Sub	Number of Contracts with DVBE participation (Prime or Sub) #	Total Number of DVBE Contracts #	DVBE Participation %	Contracts with DVBE participation in All Contracts %	Dollars Awarded %	Number of Contracts %
1. Goods (Non-IT)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				%	%	%	%
2. Services (Non-IT)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				%	%	%	%
3. Construction	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				%	%	%	%
4. IT (Goods and Services)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				%	%	%	%
5. Cal Card Transactions	<input type="text"/>								%	%	%	%
TOTALS									%	%		

of Certified DVBE's as Prime: # of Awards to DVBE's as Prime:
 # of Certified DVBE's as Subs: # of Awards to DVBE's as Subs:
 # of Certified SB's as Prime: # of Awards to SB's as Prime:
 # of Certified SB's as Subs: # of Awards to SB's as Subs:

Note: Intake Pages (manual submission) are only allowed on a case-by-case basis and access is granted at the discretion of OSDS Reports.

Intake Pages – Form 810 SB/Micro Participation

[Favorites](#) > [Main Menu](#) > [FISCAL Processes](#) > [FISCAL Extension](#) > [PO](#) > [Form 810 - Intake Pages](#)

[Form 810 Contract Activity](#) | [Form 810S SB/DVBE Options](#) | [Form 810A I-Bond Report](#) | [Form 810C Consulting Services](#)

Fiscal Year: _____
 Business Unit: _____ Modified On: _____
 Modified By: _____

Note: Form 810 have three tabs below. All three tabs must be completed before submitting the report.

[Total State Contracting Activity](#) | [DVBE Participation](#) | [Small Business \(SB\)/Micro Business Participation](#)

Contracting Activity Category	Awarded Amount \$ (SB Primes)	Awarded Amount \$ (Micro Primes)	Number of Contracts # (SB Primes)	Number of Contracts # (Micro Primes)	Awarded Amount \$ (SB Sub)	Awarded Amount \$ (Micro Sub)	Number of Sub Contracts awarded # (SB)	Number of Sub Contracts awarded # (Micro)	Number of Contracts with SB Sub-Contractors #	Number of Contracts with Micro Sub-Contractors #	Awarded Amount \$ (SB Prime and Sub)	Awarded Amount \$ (Micro Prime and Sub)
1. Goods (Non-IT)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2. Services (Non-IT)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3. Construction	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4. IT (Goods and Services)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5. Cal Card Transactions	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTALS												

of Certified DVBE's as Prime # of Awards to DVBE's as Prime
 # of Certified DVBE's as Subs # of Awards to DVBE's as Subs
 # of Certified SB's as Prime # of Awards to SB's as Prime
 # of Certified SB's as Subs # of Awards to SB's as Subs

Note: Intake Pages (manual submission) are only allowed on a case-by-case basis and access is granted at the discretion of OSDS Reports.

Intake Pages – Form 810S SB/DVBE Options

Fiscal Year

Business Unit

Modified On

Modified By

	Total Contract Dollars Awarded	Number of Contracts Awarded
SB Option	<input type="text"/>	<input type="text"/>
DVBE Option	<input type="text"/>	<input type="text"/>
DVBE Incentive	<input type="text"/>	<input type="text"/>

Note: Intake Pages (manual submission) are only allowed on a case-by-case basis and access is granted at the discretion of OSDS Reports.

Intake Pages – 810A IBond/IIJA

Form 810 Contract Activity | Form 810S SB/DVBE Options | **Form 810A IBond/IIJA Report** | Form 810C Consulting Services

Fiscal Year
Business Unit
Modified On
Modified By

IBond/IIJA	IBond/IIJA Total Contract \$	IBond/IIJA Total \$ to DVBE Prime Contractors	IBond/IIJA Total \$ to DVBE Sub Contractors	IBond/IIJA Total \$ to DVBE Prime & Sub Contractors	IBond/IIJA Total DVBE %	IBond/IIJA Total \$ to Prime Contractors (SB)	IBond/IIJA Total \$ to Prime Contractors (Micro)	IBond/IIJA Total \$ to Sub Contractors (SB)	IBond/IIJA Total \$ to Sub Contractors (Micro)	IBond/IIJA Total \$ to Prime & Sub Contractors
IIJA Division A					%					
IIJA Division B					%					
IIJA Division E					%					
IIJA Division F					%					
IIJA Division G Title IX					%					
Prop 1					%					
Prop 1B					%					
Prop 1C					%					
Prop 1D					%					
Prop 1E					%					
Prop 84					%					
Grand Total					%					

Save | **Submit** | Print Report

Note: Intake Pages (manual submission) are only allowed on a case-by-case basis and access is granted at the discretion of OSDS Reports.

Intake Pages – 810C Consulting Services

Form 810 Contract Activity | Form 810S SB/DVBE Options | Form 810A I-Bond Report | **Form 810C Consulting Services**

Fiscal Year: _____
 Business Unit: _____ Modified On: _____
 Modified By: _____

List of Transactions

	Transaction Type	Transaction ID#	Entered	Entered \$	Acquisition Method Code (E)	Low Bid Y/N (E)	Amended	Amended \$	Acquisition Method Code (A)	Low Bid Y/N (A)	Completed	Completed \$	Acquisition Method Code (C)	Low Bid Y/N (C)
1	PO	7679	<input checked="" type="checkbox"/>	3000.00	Non Competitive Bid	N	<input type="checkbox"/>		Non Competitive Bid	N	<input checked="" type="checkbox"/>	6000.00	Non Competitive Bid	N
2	PCard	3145325235	<input type="checkbox"/>		California MultiAward Schedule	Y	<input checked="" type="checkbox"/>	45464.000	California MultiAward Schedule	Y	<input type="checkbox"/>		California MultiAward S	Y
3	Contract	523	<input checked="" type="checkbox"/>	67788.000	Non Competitive Bid	Y	<input type="checkbox"/>		Non Competitive Bid	Y	<input type="checkbox"/>		Non Competitive Bid	Y

Report Codes & Amounts Summary

	Total Amount \$	Total Contract Number #	Low Bid [Y]es	Low Bid [N]o	3 - Non Competitive Bid	4 - California Multi Award Schedule	5 - Master Service Agreement	Total CMAS & MSA
Entered	70788.00	2	1	1	2			
Amended	45464.00	1	1			1	1	
Completed	6000.00	1		1	1			

Save | **Submit** | Print Report

Find | View All | First 1-3 of 3

N (C)	Contractor's Name	Contractor's ID#	Number of Bids	Contract Signed Date	Contract Work Started Date	Contract Work Amended Date	Contract Work Completed Date	Contract Purpose	Beneficiary	Justification	Explanation
▼	OSDS test	123	3	03/01/2021	05/03/2021	05/31/2021	05/31/2021	test1	test2	test3	test333333333333
▼	osds tesr	345	2	01/01/2021	05/01/2021	05/31/2021	06/01/2021	test2	tset4	test5	test555555555555
▼											

Note: Intake Pages (manual submission) are only allowed on a case-by-case basis and access is granted at the discretion of OSDS Reports.

Intake Pages Recap

- Manual submission only allowed at the discretion of OSDS.
- Enabling intake disables a department's ability to pull reports based on FI\$Cal's calculations and a DVQ.
- Departments must maintain records supporting manual changes, reported amounts and SB/DVBE participation:
 - Prior to being enabled Intake Pages, download ALL 810 forms and DVQ. Manually document changes and final calculations.
 - Ensure secondary review and approval are done prior to submitting.
- Ensure "submit" button is pressed on all tabs and subtabs of the 810 forms.

Improvement Plans

- Required if a department misses one or both participation goals for a reporting fiscal year.
- Any contract that uses IIJA funds that did not meet the 25% SB participation goal.
- Submitted through [DGS Shared Services Portal](#) (new users will have to register)
 - [Guide to accessing the Improvement Plan](#)

For questions about Improvement Plans, please contact:

**Statewide Advocacy
Support Section**

Advocate@dgs.ca.gov

Imran Chaudhary

Statewide Advocacy Support
Section Manager

Imran.Chaudhary@dgs.ca.gov

(916) 597-3139

Cover Letters

Departments should submit cover letters to OSDS only if:

- They are reporting for multiple BUs or other state entities within one BU.
- If they did not meet one or more of its participation goals due to extreme or uncontrollable circumstances. While this cover letter will not exempt the department from any of its reporting requirements, it will allow OSDS to better assess the hurdles the department is facing and develop strategies to better aid them in meeting their goals in the future.

Please include the following:

- If reporting for multiple BUs or state entities, specify which groups are included in the report.
- An analysis of trends and any anomalies in the SB or DVBE participation.
- Review of progress on all prior year Improvement Plan items enacted and their effect on current participation goals, if applicable.

Cover letter submissions must be sent to OSDSReports@DGS.ca.gov by Oct. 1. Submitting a cover letter is not the same as submitting an Improvement Plan.

Remedial Actions – Assembly Bill 2019

- AB 2019 requires DGS to consider remedial actions for any department that does not meet either the SB or DVBE participation goals for three out of five years beginning with fiscal year 2022-23.
- The 2024-25 CAR includes a list of departments subject to remedial actions and what those remedial actions are.
- Departments at risk for remedial actions based on their 2025-26 midyear numbers have been emailed.
- Management Memo and State Contract Manual chapter in progress.

Important CAR Reporting Dates

July 31	Final day to request an extension.
October 1	CAR Report + Improvement Plans DUE DATE
October 2	OSDS runs and saves all reports, except extensions
October 1 or 2	BUs run their own final reports and SAVE FOR THEIR RECORDS
October 15	Deadline for departments with extensions.
Post extension	BUs to run their own report
January – February	DGS' Purchasing Authority Unit sends deficiency letters to departments that did not report or did not submit improvement plans
January - April	OSDS publishes the report

Reporting Best Practices

- Keep in touch with OSDS at Advocate@dgs.ca.gov and OSDSReports@dgs.ca.gov.
- Run your report and verify data on a sample basis monthly, or at least quarterly.
- Correct transactions throughout the fiscal year to the extent possible.
- Ensure that the correct fiscal year was selected on all Change Orders or amendments.
- Encourage department buyers, PCard reconcilers or SCPRS processors take necessary trainings and enter in transaction information into FI\$Cal accurately.
- Develop/strengthen internal review and approval processes.
- Report defects to FI\$Cal Services Center and cc OSDSReports@dgs.ca.gov.
- Subscribe to DGS [Broadcast Bulletins](#) to be notified of upcoming events and trainings, policy changes and other reporting related announcements.
- Ensure your department's SB/DVBE Advocate's contact information is up to date in the [SB/DVBE Advocate Directory](#).

Resources and Tools for CAR Reporting

- All trainings, resources, tools and job aids can be found on our [File Consolidated Annual Report for State Contracting](#) webpage.
 - Consolidated Annual Report - Frequently Asked Questions
 - FI\$Cal/SCPRS User Guide to CAR Reporting
 - Running the CAR Reports (Form 810) Reports and DVQ in FI\$Cal Job Aid
 - Using a Department's Data Validation Query Job Aid
 - Intake Pages Job Aid
 - CalOES Mission Task & Statewide Incident IDs Training
 - DGS PD 810Ae - SB IIJA Participation Exemption

Other Helpful Resources

- [FI\\$Cal Learning Center|FI\\$Cal - State of California. One state. One system.](#)
- [FI\\$Cal Service Center|FI\\$Cal - State of California. One state. One system.](#)
- [Office of Small Business and Disabled Veteran Business Enterprise Services](#)
- [SB/DVBE Best Practices for State Departments](#)
- [State Contracting Manual, Vol. 1](#)
- [State Contracting Manual, Vol. 2](#)
- [California Legislative Information](#)
- Subscribe to DGS [Broadcast Bulletins](#)
- Subscribe to receive DGS [Management Memo](#) updates
- [OSDS Compliance Webpage](#)

Contact OSDS

REPORTING RELATED QUESTIONS

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OSDSReports@dgs.ca.gov

WAYS TO INCREASE SB OR DVBE PARTICIPATION AND IMPROVEMENT PLAN QUESTIONS

Statewide Advocacy Support Section

Advocate@dgs.ca.gov