

# Intake Pages Job Aid

**Target Audience:** CAR reports preparer and approvers from departments that are not transacting in FI\$Cal, including voluntary reporting departments (i.e., California State Universities) and deferred or exempt departments from FI\$Cal.

**Purpose:** Form 810 Intake page functionality has been implemented in FI\$Cal system for deferred or exempt departments providing them the ability to submit their CAR report online by logging into FI\$Cal .

### To access the Form 810 Intake Pages:

• Use the below steps to Log in to FI\$Cal:

Step 1: Type <u>FI\$Cal.ca.gov</u> in the web browser and click enter. On the FI\$Cal page, click on the Access FI\$Cal button.



Step 2: On the Access FI\$Cal Page click on the PeopleSoft icon.





Step 3: Click on the Agree button on the Privacy Policy then type the Username on the Sign in section and click on the continue button.



Step 4: Enter the password and click on the enter button.



 After Login to FI\$Cal the user can access the intake pages by using the following navigation: Main Menu > FI\$Cal Processes > FI\$Cal Extension > PO > Form 810 - Intake Pages



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#### 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 = V	
Search Clear Basic Search 🛱 Save Search Criteria	
ind an Existing Value   Add a New Value	

On the above page in the screenshot, when the user enters the business unit number and fiscal year fields then clicks on the search button, the system will take the user to the Form 810 Contracting Activity Report. The system will display the Form 810 report by default. To access other Consolidated annual report forms (Form 810 S, Form 810 C, and Form 810 A), the user can select the Form's from the tabs on the top of the Intake pages.

#### Screenshot of Form 810:

#### Part 1: Total State Contracting Activity

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In all condact Activity Form	STUS SE/DVEC Opuc		III o TOA I-Bolid Report	ini a luc consi	ululig Services			
Fiscal Year 2020-2021								
Business Unit 6840 CSU, 5	San Marcos		Modified On	08/05/21 1:	32PM			
			Modified By	DGS SB/DV	/BE Cert Manage	٢		
Note: Form 810 have three tabs be	low. All three tabs mus	st be compl	leted before submitting the re	port.				
Total State Contracting Activity	DVBE Participation	Small E	Business (SB)/Micro Business	Participation				
Contracting Activity Category	Total Awarded	I Amount \$	Total Number of Contracts #	Share of Doll	ars Awarded %		Share of Number of Contracts %	
1. Goods (Non-IT)						%		%
2. Services (Non-IT)						%		%
3. Construction						%		%
4. IT (Goods and Services)						%		%
5. Cal Card Transactions						%		%
TOTALS								
# of Certified DVBE's as Prime		# of Awa	rds to DVBE's as Prime					
# of Certified DVBE's as Subs		# of Awa	rds to DVBE's as Subs					
# of Certified SB's as Prime		# of Awa	rds to SB's as Prime		_			
# of Certified SB's as Subs		# of Awa	rds to SB's as Subs					



### Part 2: DVBE Participation:

810 Contract Activity Form 810	S SB/DVBE Options	Form 810A I-Bond	Report Form 8	810C Consulting Se	rvices								
scal Year 2020-2021 siness Unit 6840 CSU, San I	Marcos		Modified On ( Modified By [	08/05/21 1:32PM DGS SB/DVBE Cer	t Manager								
te: Form 810 have three tabs below.	All three tabs must be	e completed before su	bmitting the report.										
Contracting Activity Category	Awarded Amount \$ (Prime)	Mall Business (SB)/M 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)									9	6	6	%	%
2. Services (Non-IT)									9	6	6	%	96
3. Construction									9	6	6	%	%
4. IT (Goods and Services)									9	6 9	6	%	%
5. Cal Card Transactions									9	6	6	%	%
TOTALS									9	6	6		
of Certified DVBE's as Prime	#	of Awards to DVBE's a	as Prime										
of Certified DVBE's as Subs	#	of Awards to DVBE's a	as Subs										
of Certified SB's as Prime	#	of Awards to SB's as F	Prime										
of Certified SB's as Subs	#	of Awards to SB's as S	Subs										

## Part 3: SB/Micro Business Participation:

	> FI\$Cal Processes *	> FI\$Cal Extension	• > PO • > F	form 810 - Intake P	ages														-
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m 810 Contract Activity For	m 810S SB/DVBE Option	Form 810A I-Bo	nd Report Form	n 810C Consulting	Services													New Wr	ndow Help Personal
Fiscal Year 2020-2021																			
Business Unit 6840 CSU	, San Marcos		Modified On Modified Dr	08/05/21 1:32PM	l and Management														
			mounned by	003 38/0786 0	er wanager														
Note: Form 810 have three tabs t	below. All three tabs must	be completed before	submitting the repo	srt.															
otal State Contracting Activity	DVBE Participation	imall Business (SB)	Micro Business F	Participation															
Contracting Activity Categor	Awarded Amou \$ (SB Primes)	t 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)	Number of Contracts with SB participation (Prime or Sub) #	Number of Contracts with Micro participation (Prime or Sub)#	Number of SB Contracts (Prime or Sub) #	Number of Micro Contracts (Prime or Sub) #	SB Participation %	Micro Participation %	Contracts with SB Participation in All Contracts %
1. Goods (Non-IT)																	9	6 9	6
2. Services (Non-IT)																	,	6 9	6
3. Construction																		6 9	6
4. IT (Goods and Services	)																9	6 9	6
5. Cal Card Transactions																	9	6 9	6
TOTALS																	9	6 9	6
																		9	6
# 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 a	as Prime																

## Note: A warning message will display when the user clicks the submit button:

Message
Warning: (25005,2828)
Once you submit the report you will need to contact OSDSReports@dgs.ca.gov to make any other changes. To submit your final report, click OK. If you want to double-check your report data to make sure it is complete and accurate, click Cancel.
OK Cancel



After clicking "OK" on the above warning message, the system will lock the page and will not allow any edits. The system will also display a confirmation message (see the below screenshot). Contact OSDS to unlock the page for any corrections in the report.

Message	
Report Submitted Successfully. (25005,2829)	
ОК	

• <u>Screenshot of Form 810 S</u>: The user can access the Form 810S Intake page by clicking on the Form 810 S SB/DVBE Options Report tab from the top of the page.

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Favorites -	Main Menu - FI\$Cal Proc	esses 🗸 🔿 🛛 FI\$Cal Extension 🗸 🔿	PO 🗸 > Form 810 - Intake Pages
Form 810 Contra	ct Activity Form 810\$ SB/DVBE	Options Form 810A I-Bond Report	Form 810C Consulting Services
Fiscal Year	2020-2021		
Business Uni	t 6780 CSU, Sacramento	Modified	On 05/17/21 10:32AM
		Modified	By Department Buyer
	Total Contract Dollars Awarde	d Number of Contracts Awarded	
SB Option			
DVBE Option			
DVBE Incenti	ve		
Save	Submit Print Report		
Form 810 Contract	Activity   Form 810S SB/DVBE Optic	ns   Form 810A I-Bond Report   Form 810	OC Consulting Services

Note: The system displays a warning message as mentioned in Form 810 report. (Refer Page# 4 and 5)



<u>Screenshot of Form 810 A</u>: The user can access the Form 810A Intake page by clicking on the Form 810 A I-Bond Report tab from the top of the page.

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Form 810 Contract	Activity Form 81	OS SB/DVBE Options	Form 810A I-Bond	Report Form 81	0C Consulting Services								
Fiscal Year	2020-2021												
Business Unit	8780 "Little Hoo	ver" Commission	N	lodified On 04/1	9/2021 2:53PM								
			N	lodified By Dep	artment Buyer								
Bond ID	Bond Total Contract \$	Bond Total \$ to DVBE Prime Contractors	Bond Total \$ to DVBE Sub Contractors	Bond Total \$ to DVBEPrime & Sub Contractors	Bond Total DVBE %	Bond Total \$ to Prime Contractors (SB)	Bond Total \$ to Prime Contractors (Micro)	Bond Total \$ to Sub Contractors (SB)	Bond Total \$ to Sub Contractors (Micro)	Bond Total \$ to Prime & Sub Contractors (SB)	Bond Total \$ to Prime & Sub Contractors (Micro)	Bond Total % (SB)	Bond Total % (Micro)
Prop 1	200.00	50.00	20.00	70.00	35.00 %	100.00	20.00	10.00	20.00	110.00	40.00	55.00 %	20.00 %
Prop 1B	3000.00	100.00	200.00	300.00	10.00 %	60.00	30.00	40.00	10.00	100.00	40.00	3.33 %	1.33 %
Prop 1C	1000.00	500.00	100.00	600.00	60.00 %	500.00	200.00	30.00	20.00	530.00	220.00	53.00 %	22.00 %
Prop 1D	1000.00	200.00	100.00	300.00	30.00 %	100.00	200.00	10.00	15.00	110.00	215.00	11.00 %	21.50 %
Prop 1E	500.00	100.00	50.00	150.00	30.00 %	50.00	60.00	30.00	12.00	80.00	72.00	16.00 %	14.40 %
Prop 84	300.00	200.00	100.00	300.00	100.00 %	200.00	50.00	23.00	33.00	223.00	83.00	74.33 %	27.67 %
Grand Total	6000.00	1150.00	570.00	1720.00	28.67 %	1010.00	560.00	143.00	110.00	1153.00	670.00	19.22 %	11.17 %
Save	Submit	Print Report											
The Return to Sear	rch + Previous	in List Next in	1 ist										
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Note: The system displays a warning message as mentioned in Form 810 report. (Refer Page# 4 and 5)

• Form 810 C: The user can access the Form 810C Consulting Services report by clicking on the Form 810C Consulting Services tab from the top of the page.

#### Part 1:

Form 310 Contract Adv/wy Form 8105 SB0/VBE Options Form 8104 Head Report Form 8105 Consulting Services   Fixed Year   Fixed Year 2020-2021   Business Unit 6720 CSU, Sazzamento   Modified Dr 061712111:17AM   Modifi	avorites 🖌 🛛 Main	ft1.financials.fiscal.ca.g	w/psp/psfft1/E \$Cal Process	MPLOYEE/ERP/c/	ZZ_PO.ZZ_PO_RPTS	_CMP.GE P - 🔒 C 🏉 F	iorm 810 - Intak Intake Pages	e Pages >>											
Form 8100 Contract Addwiny       Form 8105 SBD/VBE Options       Form 8104 Consulting Services       Form 8105 Consulting Services         Fixed Year       2020-2021         Business Unit 6780       CSU, Saczamento       Modifiel On Bos SBD/VBE Cent Manager         Let of Transaction Point Competitive Bild       Modifiel On Bos SBD/VBE Cent Manager																		â 着	<u>م</u>
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Busines Unit 020       C40, Sacannet0       Modif 020       Signification Modification Mod	Fiscal Year 20	2020-2021																	
List of Transaction UP remains the finite of	Business Unit 67	3780 CSU, Sacrar	nento		Modifie	ed On 05/17/21 11:17A	M Cert Manager												
Image: 0       Transaction (DF       Entered       Entered       Acquisition Method Code (G)       Low Bid YN (A)       Completing       N<       O       O       Completing       Completing       Completing       Completing       N<       O       O       Completing       Completing       N<       O       O       Completing	List of Transaction	ns																	
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vm 810 Contract Activity Form 810S SB/IV/RF Onlines Form 810A LiBord Report Form 810C Consulting Services	Return to Search	* Previous in L	ist 🚛 Ne	ext in List															
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Part 2:

Help | Personalize Page 🔲

										Find   View All	🔜 First	🜒 1-3 of 3 🕑 Last
N (C)	Contractor's Name	Contractor's ID#	Number of Bids	Contract Signed Date	Contract Work Started Date	Contract W Amended E	ork late	Contract Work Completed Date	Contract Purpose	Beneficiary	Justification	Explanation
~	OSDS test	123	3	03/01/2021	05/03/2021	05/31/2021	31	05/31/2021	test1	test2	test3	test333333333333333333
~	osds tesr	345	2	01/01/2021	05/01/2021	05/31/2021	31	06/01/2021	test2	tset4	test5	test55555555555555555555555555555555555
~					]	10	31	8	0			

Note: The system displays a warning message as mentioned in Form 810 report. (Refer Page# 4 and 5)



**Form 810 E:** The entry point for the Ethnicity, Race, Gender and Sexual Orientation (ERGSO) (DGS PD 810E) was developed and launched in July 2019. As such there is no change to the reporting process for the ERGSO data collected.