## **Apply for Certification with WMATA**

Job Aid





## Introduction:

When a supplier registers to do business with WMATA, the supplier has the ability to apply for the various certification programs that are available.

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Favorites -	Main Menu -	
	Search Menu:	
Procurement O	) ())	)
View Active	Manage Solicitations and Bids	¢ •
View Solicita	Manage Contracts	•
	Reporting Tools	•
- <u>view Award</u>	DBE/SBE/MBE Certification	
View Bid Op	View Terms & Conditions	
View Freque	Change My Password	
	My Personalizations	
	My System Profile	
Announcement	My Dictionary	

Step	Action
1.	Navigate to DBE/SBE/MBE Certification page using the following menu path:
	Main Menu > DBE/DBE/MBE Certification

Favorites -	Main Menu -	>	DBE/SBE/MBE Certification
My Certificat Enter any inform	t <b>ion</b> nation you have a	nd click S	Search. Leave fields blank for a list of all values
Find an Exist	ing Value Ac	ld a New	Value
Search Cr	iteria		

Step	Action
2.	Click the Add a New Value tab.

Welcome, RB	Fulton Company, Inc.			User:	R B Fulton Company
Existing WMAT	TA Certification 🛞				
Certification Type	Certification Number	Certificate Start Date	Certificate Expiration	Certification Status	Download Certificate
					Doumload Contificato
lease review all de ertification submitt	ocuments for completer ted. Please use the che	ness before submission. ck off list provided and c	The primary cause of de heck off all necessary do	layed certification is la currents prior to subm	ck of documentation supporting t ission.
flease review all de ertification submitt or further informat	ocuments for completer ted. Please use the che tion please visit our web dress and Contact Ir	ness before submission. ck off list provided and cl isite at http://www.wmata	The primary cause of de heck off all necessary do a.com/business/disadvan	layed certification is la cuments prior to subn taged_business_ente	ck of documentation supporting t nission. rprise/
tease review all de ertification submitt or further informat Step-1 Add Add/Verify	ocuments for completer ted. Please use the che tion please visit our web dress and Contact Ir r Address and Contact	ness before submission. ck off list provided and cl site at http://www.wmata nformation (2)	The primary cause of de heck off all necessary do a com/business/disadvan	layed certification is la ccuments prior to subn taged_business_ente	ck of documentation supporting t nission. rprise/

Step	Action
3.	Select the Certification Review tab
4.	Select the Add/Verify Address and Contact link to validate information

Maintain Addresses			
Current Addresses			
NuCrest, LLC			
Address List	Personalize   Fir	nd   🖾   🔣 First 🛞	1 of 1 🛞 Last
Addresses Address Use			
Description	Address Type		
Auction Generated Address 1	Business	Edit	Delete

Step	Action
5.	Select the Auction Generated Address 1 link to review information

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Maintain Addres	sses				
Address Info	ormation	ר			
NuCrest, LLC					
Description:		Auction Gener	rated Address 1		
Address Type:		Business			
Country:	USA	United State	S		
Address 1:	613 Ma	ccubbin Lane			
Address 2:					
Address 3:					
City:	Gambri	ills			
County:	Anne A	rundel	Postal:	21054	
State:	MD	Maryland			
Email ID:	dummy	@wmata.com			
<b>Telephone Info</b>	rmation	F	ersonalize   Find   🖾   🖩	First 🕚 1 of 1 🤅	Last
Туре		Prefix	Phone	Ext	
Business Phone					
Date Change Will Return to Current A	Take Effec	t: 05/11/202	Ō		

Step	Action
6.	After review, click <b>Return to Current Addresses</b> link to return to Maintain Address page

Step-2 Demography Information	(?)	
*Ethnicity Black	×	*Women-Owned Business No V

Step	Action
7.	Demography Information (Step-2)
	Select <i>Ethnicity</i> type from the dropdown menu.
	Select Women-Own Business type from the dropdown menu

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<ul> <li>Step-3 Certification App</li> </ul>	blication 🕐		Newer Application 1 of 1 Older Application
Application Status: New  Step-3A Revenue and	-Not Submitted	Number:	Туре:
Current Year Revenue and	d Employees		
Current Year: 2021 Last Three Years Revenue	Revenue: \$32,35 and Employees	90.34	Number of Employees: 2
Year-1: 2020	Gross Receipts: \$23,87	3.00	Average: \$25,597.00
Year-2: 2019	Gross Receipts: \$27,32	1.00	Please Note: Receipts are considered total income plus cost
Year-3: 2018	Gross Receipts: 31297		of goods sold.
Owner Title: President	Owner Name: Joe Do	e	

Step	Action			
8.	Revenue and Employee Information (Step-3A)			
	Enter in the following information:			
	Current Year			
	Revenue			
	Number of Employees			
	<ul> <li>Last three years Revenue and Employees section</li> </ul>			
	<b>Note:</b> The average revenue and the number of employees will determine your eligibility to local programs. (SBP and MBP)To update, click <b>Edit</b> button			

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▼ Step-3B Certificate Information ②	
Apply For: DBE SE BE BE BE BE MBE BE MBP	
Step-3C Eligibility Requirements Find First	④ 1-7 of 7 ④ Last
Is your firm organized as a for-profit business?	
Is your firm at least 51% owned by socially and economically disadvantaged individual(s) who also controls it?	
Are firm's disadvantaged owner(s) U.S. citizens or lawfully admitted permanent residents of the U.S.?	
Did your firm's gross receipts, averaged over the past three years, not exceed NAICS code size limitations?	
Is your firm's (including all affiliates) average gross receipts, over the previous three years, less than \$26.29 million?	
Is the owner(s) personal net worth less than \$1.32 million?	
Are you prepared and able to provide all applicable supporting documentation, such as the most recent 3 years business Federal tax returns, organizational documents, applicable licenses, insurance certificates, owner & key management resumes,	

Step	Action
9.	<b>Certification Information (3B) - Apply For:</b> Select the desired certification program you would like to apply for.
	<ul> <li>Note: Available certification programs will display based upon eligibility.</li> <li>When DBE is selected, SBE will be automatically selected as well.</li> <li>When SBE is selected, the application will be for SBE only.</li> </ul>
	For additional information on certification program eligibility requirements, please see the <b>eligibility guide.</b>
10.	Eligibility Requirements (Step – 3C)
	For each question, please select Yes or No
	<b>Note:</b> All questions must be answered prior to proceeding to the next step.

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Step-3D Download Templates a	and Instructions			
Document Description		Document Template		
Instructions		Instructions.pdf		
DBE Certification Application		DBE_Uniform-Certification-Application.pdf		
Personal Networth		DBE_PNW_Statement.pdf		
Comments - Click (+) to add or (	-) to remove Comment	Find View All First 🕚 1 of 1 🕢 Last		
Step 3E Upload Documents - Cli	ck (+) to add document.	Find View All First ④ 1 of 3 ④ Last		
Doc Type Attached File	Description	Attach View Date Time Attached By +		
DBE Certit 🗸	DBE Application ×	Attach View Delete		
Save Draft	Sub	mit Application to WMATA		

Step	Action				
11.	Download Template and Instructions (Step – 3D)				
	Select the link to download the displayed documents.				
	<b>Note:</b> The list of documents will depend on the certification program selected.				
12.	<b>Comments – Optional,</b> this free-form field can be used to provide any additional information relevant to the processing of the application.				
13.	Upload Documents (3E)				
	Upload all required documents need to complete the application.				
	Select Doc Type from the dropdown menu				
	Enter document <b>Description</b>				
	Click Attach button to continue				

Step-3C Eligibility Requ	uirements		Find Fi	rst 🕚 1-3 of 3 🕑 Last
Is your firm organized as a	for-profit business?			
Are firm's disadvantaged o	File Attachment	2.11-	×	
Are you prepared and able Federal tax returns, organi		Browse	business ment resumes	
Step-3D Download Te	Upload Cancel			
MBE Certification Applicati			pdf	
Comments - Click (+) to			ind   View All	First 🕚 2 of 2 🕑 Last
		1700	Comment By	Date Time

Step	Action
14.	Click Browse on the File Attachment screen

Choose File to Upload						2
$\leftarrow$ $\rightarrow$ $\checkmark$ $\uparrow$ 🛅 > This	PC > Documents	ٽ ~	Search	Document	s	م
Organize - New folder					•	
🔚 Pictures 🛛 🖈 🔨	Name			Status	^	
📜 Novation & N 🖈	DBE Certification Application			C		
OneDrive_1_5-18	Franklin Court, Inc. W9			$\odot$		
PAR	Apply for Recertification with	WMATA - J	ob Aid	$\odot$		
PRMT SOPs	Weekly Status Report Week Er	nding May	21st, 2	$\odot$		
Saved Pictures	SBPO Certification Screenshot	s		$\odot$		
	Certification Job Aid			$\odot$		
CheDrive - WMAI	📴 DBE No Change Affidavit			$\odot$		
SThis PC	Notice Regarding Change			$\odot$		
3D Objects	🕮 Personal Net Worth Statemen	t		$\odot$		
Desktop	🛃 iLobby Corp. W-8BEN-E 2021			$\odot$		
Documents	Socio Economic Admin Page	- Will need	it later	$\odot$	~	
Downloade ¥	<			-	>	
File nam	DBE Certification Application	~	All File	s (*.*)		~
			0	pen	0	Cancel

Step	Action
15.	Select the desired document to upload and click <b>Open</b> to continue.

File At	ttachment
	? Help
C:\User	s\e019689\Downloads\MBESBPMBP_Certificat Browse
Upload	Cancel
Step	Action
16	Select the Unload button



Step 3E Upload Documents - Click (+) to add	document.			Find	View All F	irst 🚯 1 of 3	Last
Doc Type Attached File	Description	Attach	View		Date Time	Attached By	+
DBE Certi V DBE_Certification_Application.docx	DBE Application	Attach	View	Delete			
Save Draft		Submit Applica	tion to W	MATA		)	

Step	Action
17.	Document upload complete.
	<b>Note:</b> To upload additional documents click the <b>plus</b> sign to add a new row.
18.	Click Submit Application to WMATA button to submit application

WMATA Acknowledgement Receipt				
Do-not-reply@wmata.com		← Reply	≪ Reply All	$\rightarrow$ Forward
To Amadi, Bekwele I.				Wed 5/12/2021 3:2
Retention Policy WMATA 180 Retention Policy (6 months)	pires 11/8/2021			
(1) If there are problems with how this message is displayed, dick here to view it in a web browser. Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.				
WMATA Acknowledgement of Application				
Dear Joe Doe				
This is to acknowledge receipt of your ('SBP'/MBP') application. Your application package number is 0000003946. Your application incomplete information/documentation, will be communicated via e-mail or telephone. Once the application is determined complete change(s) or omission(s) to the information provided, please contact <u>sbpohotine@wmata.com</u> immediately.	n package will be screened for completeness before s the review process will begin, and you will be notified	tarting the revie in writing withir	w process. Any requ n 90 business days.	uest(s) for missing or If there are any
Your interest in WMATA(s) ( 'SBP','MBP') Program is appreciated.				
Please do not reply back to this email, as it is not monitored.				

Step	Action
19.	You will receive a confirmation email that your certification application was successfully submitted to the email address listed on application.
	End of procedure.