

CLIENT CHECKLIST (DON'T SHARE WITH CLIENT)

CTPTAC Neoserra: <https://ctptap.neoserra.com/login>

CONCORD register status

<https://www.concord-sots.ct.gov/CONCORD/online?sn=PublicInquiry&eid=9740>

Neoserra profile check

Federal Government:

Profile

✓ SAM

Existing Entity check

- expire date
- Address
- Business Type (if client click WOSB, EDWOSB, Veteran, counselor need to check if client get the certificate; For Minority Business, counselor need to check if the client has qualified)
- Credit card
- NACIS code
- SDB - Small Disadvantage Business - based on ethnicity
- Disaster Response Information

New Register

DUNS number: 1-866-203-7682 called D&B Government Services

- Do not reference D&B or Dunn & Bradstreet - this is contractor providing credit activity
- State you need a DUNS number for Gov Procurement reasons
- Or you can go to: www.dnb.com/govtduns
- GET: EIN Number/Banking Info (Routing Number/Account Number)
- Select NAICS codes: <https://www.census.gov/naics/> (Dr. NAICS)
- Select PSC/FSC codes : <http://support.outreachsystems.com/resources/tables/pscs/>
- Register in SAM: <https://www.sam.gov/SAM/pages/public/index.jsf> (do NOT use Internet Explorer)
 - Core Date
 - Assertions
 - Reps & Certs (FAR website)
 - POC's

✓ SBA Profile (Dynamic Small Business Search)

When SAM is active, client should have SBA DSBS Profile

http://dsbs.sba.gov/dsbs/search/dsp_dsbs.cfm

- Name of Owners
- Non-Federal-Government Certifications
- Capabilities Narrative:
- Keywords:
- Performance History (References)

Certificate

✓ SBA Self Registrations

- Woman (WOSB & EDWOSB) Link to learn about program: <https://www.sba.gov/contracting/government-contracting-programs/women-owned-small-businesses/what-you-need-know-if-you-are-women-owned-small-business>
- New Link to Self-certify as WOSB/EDWOSB: <https://beta.certify.sba.gov/>

- ✓ **SBA Certified Registrations**
 - 8(a) - Business Development Program
<https://www.sba.gov/partners/contracting-officials/contracting-program-administration/8a-program-administration>
 - HUBZone - Historically Underutilized Business Zones
<https://www.sba.gov/partners/contracting-officials/contracting-program-administration/hubzone-administration>
- ✓ **Veteran Verification Registration**
 - SDVOSB & VOSB: <https://www.vip.vetbiz.va.gov/> Select "Verification"

Opportunity Search

- ✓ **FBO:** https://www.fbo.gov/?_page_back=1

STATE OF CT

REGISTRATIONS

- ✓ **BIZNet:** <http://portal.ct.gov/DAS/Procurement/Contracting/DAS-Procurement-BizNet-Accounts>
Existing Entity check
DAS- S/MBE expire date

Certificate

- ✓ **DAS – SBE/MBE**
<http://portal.ct.gov/DAS/Procurement/Supplier-Diversity/SBE-MBE-Program-Certification-Application-Small-or-Minority-Business-Enterprise>
- ✓ **DOT - DBE:** <http://www.ct.gov/dot/cwp/view.asp?a=2288&q=307380>
- ✓ **Prequalified Contractors (DAS & DOT) Construction Contract Opportunities**
 - **DAS:** <http://portal.ct.gov/DAS/Procurement/PreQual/DAS-Construction-Contractor-Prequalification-Program>
 - **DOT:** <http://www.ct.gov/dot/cwp/view.asp?a=2288&q=259250>

Opportunity Search

- DAS Bid Portal: https://biznet.ct.gov/SCP_Search/Default.aspx?AccLast=2
- DAS - Vendor Resource: <http://portal.ct.gov/DAS/Services/Doing-Business-with-the-State/Vendor-Resources>

Marketing/ Subcontracting

- ✓ **Capability Statement**
- ✓ **USAspending:** <https://www.usaspending.gov/#/>
- ✓ **FPDS-NG:** https://www.fpds.gov/fpdsng_cms/index.php/en/
- ✓ **PROXITY:** <http://www.selectaptac.net/MainMenu.aspx>
- ✓ **Subnet:** https://eweb1.sba.gov/subnet/client/dsp_Landing.cfm
- ✓ **GSA Subcontracting:** <https://www.gsa.gov/small-business/find-and-pursue-government-contracts/seek-opportunities/subcontracting-directory-for-small-businesses>

Others

- ✓ **PUBLIC NOTICES:** <http://www.mypublicnotices.com/PublicNotice.asp>
- ✓ **Events – FREE Seminars by PTAC** <https://ctptac.org/training-and-events/calendar/>