

Respond to RFx in PASSPort

Found a contract opportunity in PASSPort to pursue? That's great!

Follow these instructions on how to submit your bid or proposal in response to the RFx.

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Before We Begin

The steps below can be completed by users provisioned with the roles:

- Vendor Admin
- Vendor Procurement L2
- Vendor Procurement L1

Important Terms

Here are some key terms associated with responding to contracting opportunities in PASSPort:

RFx Status

RFx Status shows the current phase of a solicitation in PASSPort:

- Planned: The RFx is in the planning stages.
- Released: The RFx is accepting vendor responses.
- Responses Received: The agency no longer accepts RFx responses.
- Selections Made: The agency selected vendor(s) for contract awards.
- Closed: The solicitation process has ended.

Due Date

Responses must be submitted before the Due Date as Agencies can stop accepting responses at any time on the due date. We recommend submitting responses at least 48 hours in advance of the due date.

Prequalification

Some RFx require vendors to get prequalified to respond to a particular solicitation. For example, the Health and Human Service Prequalification (HHS PQL) is a requirement of HHS providers to respond to HHS RFx in PASSPort. To learn more, see HHS Accelerator Prequalification. Check with the City Agencies in your line of work for other prequalification lists.

RFx Response

A RFx Response (Response Submission) to a solicitation released in PASSPort is the broad term for how a vendor answers the RFx. Examples of specific responses are proposals or bids.

RFx Response Status

The Response Status reflects the current stage of your RFx response:

- In Progress: You acknowledged the RFx which generated a draft RFx response. You have not yet submitted the response.
- Submitted: You successfully submitted a RFx response.
- Canceled: You canceled the RFx response, which cannot be recovered.
- Withdrawn: You withdrew a submitted RFx response, which cannot be recovered.

Addendum

An Addendum is a document published when an Agency makes an update to an RFx, such as a change in the due date. It's a document that details the changes. PASSPort notifies the participating vendors when an addendum has been issued.

Round

A new Round refers to an Agency making substantial changes to an RFx (such as a change in the scope), requiring vendors to submit new responses to the new round. An addendum is published upon agencies issuing a new round.

Selection Status

A Selection Status will only display after the selections have been made by the Agency, meaning the Agency has evaluated vendor responses and has made award selections. The selection status will read either Selected or Not Selected. Vendors will receive a notification upon award selection.

For more procurement terms and definitions, see the Important Terms section of the Find Contracting Opportunities guide and refer to the MOCS Glossary.

Respond to an RFx: Overview

Responding to an RFx consists of the following steps:

- **Study the RFx:** Thoroughly examine all RFx details to confirm your organization is qualified and has sufficient time to respond.
- **Acknowledge the RFx:** In some cases, you must acknowledge receipt of the RFx and confirm your intent to submit a response.
- **Prepare Your Response:** Complete all required sections of the RFx response.
- **Submit Your Response:** Review your entries and submit the response well before the due date.

View RFx Details

Carefully study all sections of the RFx to make an informed decision about whether your organization wishes to respond to this RFx:

- **Summary** including RFx status, funding Agency, EPIN, number of contracts, and procurement value. Only RFx in Released status are open to accept vendor responses!
- **Description** lists basic information about the RFx and what the Agency is looking to procure.
- **Key Dates** provides the Anticipated Contract Start and End Dates, Release Date, and Due Date.
- **Documents** lists supplemental material provided by the contracting agency for additional context for the RFx. **Note:** If an agency issues an addendum, a summary document will be available in the Document section outlining the changes.

To learn more about how to view RFx details, see Find Contracting Opportunities.

Key Information to Look Out For:

- **Countdown Timer:** A timer at the top of the page shows how much time remains until the due date. Aim to submit your response at least 48 hours in advance of the due date.
- **Summary section:** This section includes the agency's contact email address.
- **Key Dates section:** It not only lists the RFx due date, but also any deadline for submitting questions to the agency which may be multiple days in advance of the due date.
- **Pre-Proposal Meetings:** Any invitations to pre-proposal meetings (in-person or virtual) will be listed here.
- **Documents:** Download all available documents, including details on the opportunity, vendor guidance, and required templates. **Note:** Agencies also upload addenda and new round notices to this section.

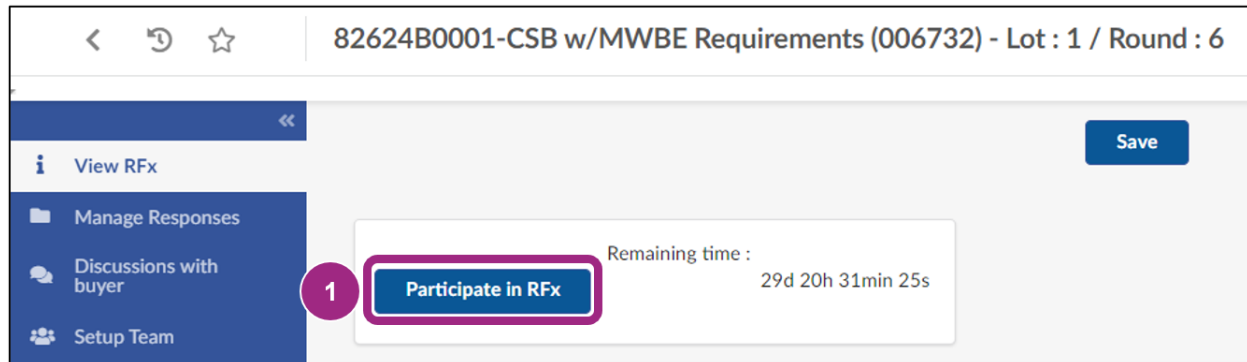
Acknowledge the RFx

Before an RFx response can be started, some RFx require vendors acknowledge receipt of the RFx and confirm that they intend to respond to the RFx.

Acknowledging an RFx must be completed by a Vendor Admin. Discuss internally who is best suited for this task. Only the designated Vendor Admin can grant colleagues access to working on the RFx response later in the process.

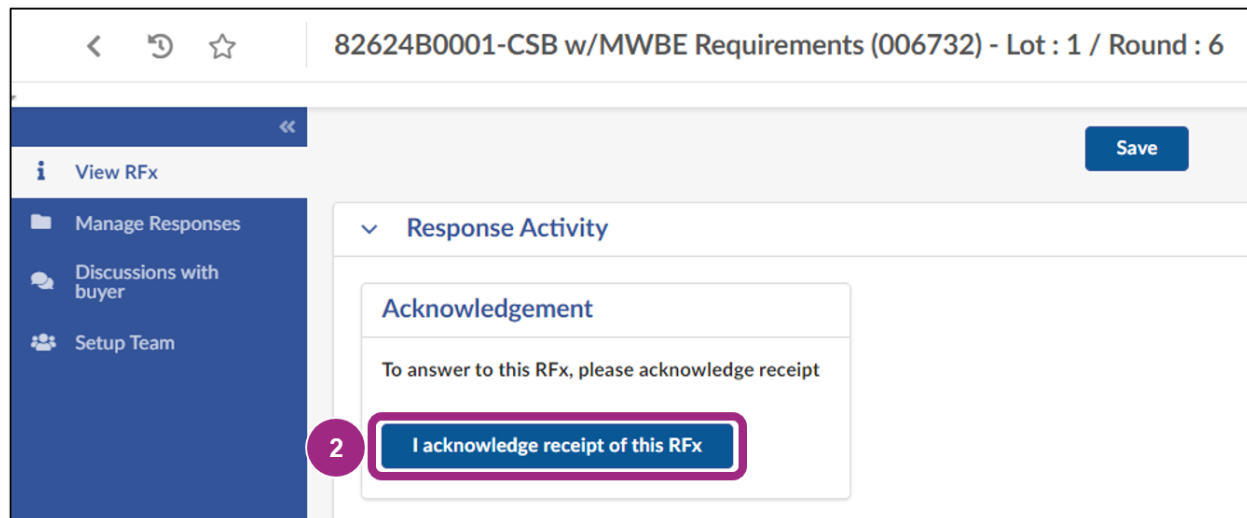
1. In the RFx, click the Participate in RFx button.

To learn more about finding opportunities, see Find Contracting Opportunities.



The page refreshes.

2. In the Response Activity section, click the I acknowledge receipt of this RFx button.



Note: If the acknowledgement buttons do not display, skip to the next step. Not all RFx require a vendor to acknowledge the RFx.

3. Select **WILL RESPOND**: our intent is to respond to this RFx.
4. Confirm the selection by clicking the green Valid button.

82624B0001-CSB w/MWBE Requirements (006732) - Lot : 1 / Round : 6

View RFX

Manage Responses

Discussions with buyer

Setup Team

Save

Remaining time : 29d 20h 26min 38s

Response Activity

Receipt acknowledged on 10/1/2024 3:31:46 AM (Your Local Time)

To answer to this RFX, please confirm that you intend to bid.

☐ WILL RESPOND: our intent is to respond to this RFX 3
 ☐ WILL NOT RESPOND: our intent is not to respond to this RFX

Valid 4

Note: If you selected WILL RESPOND and decide later that you will not submit a response, inform the Agency Contact listed in the Summary section of the RFX.

Once you selected Will Respond and clicked the green Valid button, PASSPort provides the functions and actions below.

- A countdown timer. The remaining time is displayed on every page of the RFX, tracking how much time vendors have left to submit their response before the RFX no longer accepts submissions. Please submit your response at least 48 hours in advance of the due date.
- Download all contents related to the RFX. Click the Actions button. Select this option to download a copy of the RFX so you can work on your response outside of the PASSPort.
- Duplicate Response closes your RFX response to create a copy of your response for future competition pools, or to submit information related to an RFX addendum. Multiple responses can be worked on at the same time.
- Chat with the contracting agency. Use the Discussion Forum to communicate with the contracting agency.

How to Use the Discussion Forum

Use the Discussion Forum in the RFX to communicate with the contracting agency.

The Discussion Forum benefits your team in that it:

- Makes messages visible to contacts added to your Setup Team.

- Documents all interactions.
- Available in the RFX response at all times.

Before you submit a message:

- Check the Key Dates section in the RFX to see if it lists a deadline for submitting questions to the Agency.
- For PASSort functionality questions and issues, contact the MOCS Service Desk and not the Agency.

To use the Discussion Forum:

1. Click Discussion with buyer on the left navigation menu.
2. Click the Compose button.

The screenshot shows a web application interface for managing RFX responses. The top header displays the RFX ID '82624B0001-CSB w/MWBE Requirements (006732) - Lot : 1 / Round : 6' and a search bar. The left navigation menu includes 'View RFX', 'Manage Responses', 'Discussions with buyer' (highlighted with a red box and a red circle with the number 1), and 'Setup Team'. The main content area is titled 'Response Activity' and contains a search section with a 'Keywords' input field, a 'Search' button, a 'Reset' button, and an 'Advanced search' button. Below the search section is a 'Type' drop-down menu (highlighted with a red box and a red circle with the number 2) and a 'Date' section with 'From' and 'To' date pickers. At the bottom of the main content area is a 'Compose' button (highlighted with a red box) and a 'Message History' button.

A form to compose the message appears on the right side of the page.

3. In the Type drop-down field, select the appropriate message type.
4. In the Subject text field, enter a brief phrase similar to the subject line of an email. For example, "Question about Scope of Work".
5. In the unlabeled drop-down field below the Subject, select the intended recipient(s). Select Agency Contact to send a message to the agency.

Below the recipient drop-down field is an unlabeled text field. Click the unlabeled text field and begin typing to compose your message.

7. If needed, click the Click or Drag to add files button to add an attachment.
8. When you're ready to submit the message, click the Send button.

The screen refreshes, and the message will display in three locations for your convenience:

- In the Response Activity window, in a table below the Compose button.
- In the Response Activity window, to the right of the screen. From here, there are options to reply, reply all, or forward the message.
- In the Message History window, which can be viewed by clicking the Message History button. In this window, you can view all past messages.

Add RFx Contributors

Only the user who acknowledged the RFx can work on the response, making them the sole contributor.

To allow further contacts from your organization to contribute to the RFx response, the initial user can use the Setup Team tab. This allows any Vendor Admin or Procurement user role to be granted access to the RFx response.

Here's how the Vendor Admin who acknowledged the RFx can add RFx contributors:

1. Go to the Setup Team tab in the left navigation menu.
2. To select an existing contact, select their name from the Choose a contact drop-down field.
3. To create a new contact to work on this RFx response, click the Create a new contact button.

The Contact Management window opens.

4. Enter the user's First Name, Last Name, and Email address. Use the same email (NYC.ID) that Contact uses to log in to PASSPort.
5. Click the Save and Close button at the top of the page to add the contact to the Setup Team.

Prepare Your RFx Response

When the intent to respond is affirmed, PASSPort automatically creates a draft response for the vendor in the Manage Responses tab. Now it's time to prepare your RFx response!

Important: Only users who have been added to the Setup Team tab (by the Vendor Admin who acknowledged the RFx) can work on the RFx response.

1. Go to the Manage Responses tab in the left navigation menu. The in progress RFX response is listed in the Response Activity section.
2. Click the pencil icon to open the draft response.

82624B0001-CSB w/MWBE Requirements (006732) - Lot : 1 / Round : 6

Save Close

View RFX

Manage Responses

Discussions with buyer

Setup Team

1 Response Activity

Status

Canceled x Submitted x In progress x

Search Reset

Your Proposal Info: Competition Pool

RFX Name	Response Name	Competition Pool	Responsiveness Status	Submission Status
82624B0001-CSB w/MWBE Requirements	Proposal # 1			In progress

2

The Your Proposal Info tab of your RFX response will display.

3. Edit the Response Label field to change the system generated response name.
4. Enter a description in the Description field, if necessary.
5. Select a competition pool in the Your Proposal Info: Competition Pool drop-down field.

All RFX have at least one competition pool. An agency may choose to segment a procurement into multiple competition pools based on the procurement's specifications.

Click the Save button near the top of the page when all required fields are completed.

A note regarding the RFX response action buttons:

- If necessary, use the Cancel this response button. Once an RFX response is canceled, it cannot be recovered.
- Learn when and how to use the Duplicate Response button - refer to Duplicate an RFX Response.
- A Create New Response button will be available for you to initiate the new proposal. This button will only become available after a first response has been submitted.

Now that the RFX response has a title and description, we recommend you complete the RFX response tabs in the following order:

- Questionnaire tab
- Documents tab
- Item tab
- LL34 Compliance tab
- Subcontractors and Joint Ventures tab
- MWBE Requirements tab

Note: There might be more than one Questionnaire tab in an RFX (e.g., General Envelope Questionnaire, Technical Envelope Questionnaire, and Financial Envelope Questionnaire).

Complete the Questionnaire Tab

This tab displays questions the agency would like you to respond to. The questions are written by the agency to collect vendors' answers which will be used to evaluate their RFX response(s) during the Evaluation and Award phase.

Note: There may be more than one Questionnaire tab depending on the procurement method and the agency's questions (e.g., General Envelope Questionnaire, Technical Envelope Questionnaire, and Financial Envelope Questionnaire). Questions may be scored or used for informational and/or responsiveness purposes.

1. Go to the Questionnaire tab in the left navigation menu.
2. Click the green Access Questionnaire button.

The screenshot shows a web application interface for a vendor's proposal. The title bar reads "City Wide Bidder List Vendor's proposal". The left navigation menu includes "Your Proposal", "Questionnaire" (highlighted with a red circle and the number 1), "Documents", "Item", "Subcontractors and Joint Ventures", and "M/WBE Requirements". The main content area has a top bar with buttons: "Save", "Save and Close", "Close", "Cancel this response", and "Duplicate Response". Below this is an "Overview" section with "Affirmations" (0 / 2) and "Bid Security" (0 / 1). The "Response Overview" section displays the following information:

PQL Label	Agency
City Wide Bidder List Vendor	DEPARTMENT OF ENVIRONMENTAL PROTECTION

Label	Respondent	Commodity
8262480001-CSB w/MWBE Requirements	Doe Jon	039 - Facilities Maintenance and Repair Services

At the bottom of the main content area, there is a green button labeled "Access Questionnaire" with a red circle and the number 2 next to it.

3. Answer the questions using the dropdowns or fields provided. Required fields can be identified by a red asterisk (*).

City Wide Bidder List Vendor's proposal

Your Proposal Info

Questionnaire

Documents

Item

Subcontractors and Joint Ventures

M/WBE Requirements

Overview

Affirmations 1 / 2

Bid Security 0 / 1

Affirmations

Affirmation 1

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

If "I DO NOT affirm" is selected, upload the requested document and write "Completed" in the comment box below.

Answer*

I DO NOT affirm and will attach a signed document stating why I cannot affirm.

Comment*

Completed

Note: Agencies may structure questions in the form of requests for documents. Documents cannot be uploaded directly to the Questionnaire. However, vendors can share requested documents with the agency by adding them to the Documents tab of the RFX response. Learn more about RFX document management in the Documents tab section of this guide.

- Click the Save button after all sections of the questionnaire are completed.

City Wide Bidder List Vendor's proposal

Your Proposal Info

4

Save

Save and Close

Close

Cancel this response

Duplicate Response

Complete the Documents Tab

Agencies can share documents with vendors in the Documents section of the View RFX tab (not to be confused with the Documents tab in the RFX response). Likewise, vendors can share requested documents with the agency by adding them to the Documents tab of the RFX response.

How to Name Documents:

To help streamline the RFX response process, MOCS recommends vendors implement naming conventions for the files they upload in the Documents tab of the RFX.

File names should include the following information:

- The section number
- The question number
- The document name
- Your organization's name

For example, if the agency requested that you upload an organizational chart in Section 2, Question 3 of the Questionnaire, name the document "S2Q3_OrgChart_[YourLegalBusinessName]". This naming convention will help staff performing responsiveness checks ensure that all requested documents are accounted for.

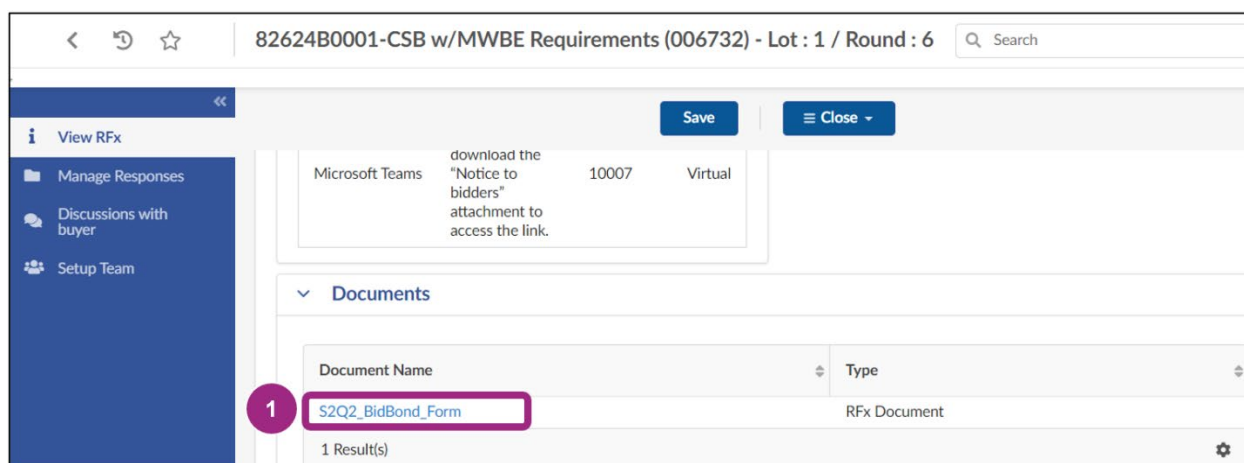
Note: Agencies will adopt similar naming conventions for files they intend to share with and request from vendors. This will assist with organization and allow both agencies and vendors to easily reference and locate documents.

How to View Documents:

The Documents section in the View RFX tab (not to be confused with the Documents tab in the RFX response) houses supplemental material provided by the contracting agency.

In some cases, agencies may request that vendors download a blank form or template listed in this section and upload the completed document in the Documents tab of the RFX response.

1. Click on the hyperlinked Document Name to download the document to your device.



How to Add Documents to Your RFX Response:

1. Go to the Documents tab in the left navigation menu of your RFX response. In the Response Documents section, there is a table that lists all the documents requested by the agency. The table includes information about the document, such as the:
 - o Document Type
 - o Required Type: Indicates if the document is Optional or Required.
 - o Agency Label: May include a description of the document requested. If the document is related to a question in the Questionnaire tab, that information will be included here.
 - o Status: Indicates if the document has not yet been added (Pending Upload)

Note: If the RFX is a Double or Triple Envelope, 2 or 3 tables will appear in this tab.

2. Click the Manage Documents button to begin adding documents to your response.

City Wide Bidder List Vendor's proposal

Save Save and Close Close Cancel this response Duplicate Response

Response Documents

Proposals # 4988

Manage Documents

Document Name	Document Type	Required Type	Agency Label	Status
Other	Optional Document		Upload a signed letter stating why you cannot affirm section 1 question 1 of the questionnaire. The document should be titled: S1Q1_Affirmation_[YourOrganizationName]	Pending upload
Security / Bond	Optional Document		Upload a notarized bid bond with the title S2Q2_NotarizedBidBond_[YourOrganizationName]	Pending upload

The Manage Documents window opens. Documents are sorted into two sections: Required and Optional.

For detailed instructions on how to add documents, see Upload or Link Documents to a Task. After successfully adding the requested documents, the document Status updates to Uploaded.

3. Click the Save button near the top of page.

City Wide Bidder List Vendor's proposal

Save Save and Close Close Cancel this response Duplicate Response

Your Proposal Info

If needed, return to the Questionnaire Tab to complete any pending questions.

Complete the Item Tab

Here, the agency identifies the required items for the contract. The Item tab can be completed directly in the system, or it can be downloaded, completed, and uploaded in Excel format. PASSPort automatically populates the responses provided.

Note: PASSPort Vault functionality is not connected to the Item tab. Therefore, vendors must upload documents from their computer to this tab.

City Wide Bidder List Vendor's proposal

Save Save and Close Close Cancel this response Duplicate Response

Creation By Import

Download in Excel 2007-2010 format (xlsx)
Download in Excel 97-2003 format (xls)

Drop here your quotation form (in Excel format)

Click or Drag to add a file

1. To manually complete the Item tab, complete the required fields marked with a red asterisk (*). If there are multiple subtabs, be sure to complete the fields in each subtab.

City Wide Bidder List Vendor's proposal

Save Save and Close Close Cancel this response Duplicate Response

Keywords Not answered items Search Reset

Response Response

0 Selected

Order	Items Code	Item Types	Label	Payment Method	Payment Units	Quantity	Price *	Total
	I1_1	Required Item	Item 1	Unit Price	Each	5.00	200.00	1,000.00
	I1_2	Required Item	Item 2	Unit Price	Each	10.00	150.00	1,500.00
	I1_3	Required Item	Item 3	Hourly Rate	Hourly	5,000.00	48.50	242,500.00

3 Result(s)

Currency USD Proposal Amount 0.00

2. Click the Save button near the top of the page.

City Wide Bidder List Vendor's proposal

Your Proposal Info Questionnaire Documents Item

2 Save Save and Close Close Cancel this response Duplicate Response

Currency USD Proposal Amount 245,000.00

The page refreshes, and the Proposal Amount field to the right of the screen updates and displays the total amount of all fields in the Item table.

Complete the LL34 Compliance Tab

Although the Subcontractors and Joint Ventures tab appears next in the RFx response menu, the LL34 Compliance tab must be completed first.

The LL34 Compliance tab allows you to complete all Doing Business Data information within PASSPort. Local Law 34 of 2007 (LL 34) is New York City's campaign finance law that limits municipal campaign contributions from principal officers, owners, and senior managers of entities doing business with the City.

An organization is required to submit the information requested on this tab each time it enters into a transaction considered a business dealing with the City, regardless of whether the organization or the people associated with it make or intend to make campaign contributions.

1. Go to the LL34 Compliance tab in the left navigation menu.

2. Read the LL34 compliance guidance and click the checkbox that affirms you have read the guidance and will complete the LL34 Compliance field.
3. If you have not done so already, click the LL34 Contact Setup button to identify LL34 contacts in your vendor profile. See the compliance guidance for instructions.

Fields marked by an asterisk * are mandatory

LL34 Compliance

- Select your organization's Principal Officers, Principal and Organization Owners, and Senior Managers in the sections below. See also the [LL34 FAQ](#).
- If your organization does not have a CEO, CFO, COO, or their functional equivalents, check the appropriate box next to "Excluded Officers" below.
- If you are a nonprofit organization, under Principal Owners, please check the box next to "The entity is not-for-profit." You should still disclose all other Principal Officers and Senior Managers.
- If you can't find your Principal Owners, CEO, CFO, COO or Senior Managers by clicking the ellipsis (three dots) to the right of Add Existing Contact, click the "LL34 Contact Setup" button. This will take you to the 2. Contacts tab of your Vendor Profile where you may identify the applicable LL34 contacts and/or add new LL34 contacts. See also the [Quick Guide: LL34 Compliance](#).

☒ I affirm that I have read the guidance and will complete the LL34 Compliance field *

[LL34 Contact Setup](#)

4. In the Principal Officers section, select a Principal Officer in the Add Existing Contact drop-down field. Multiple selections can be made. If your organization does not have a CEO, CFO, COO, or the equivalent such as President, Treasurer, etc., check the applicable box for Excluded Officers.

Principal Officers

Excluded Officers : ☐ CEO ☐ CFO ☐ COO

Add Existing Contact ⓘ

5. In the Principal Owners section, select a Principal Owner in the Add Existing Contact drop-down field. Multiple selections can be made. If there are no listed owner(s), choose the applicable checkbox:
 - The entity is not-for-profit
 - The entity is an individual
 - No individual or organization owns more than 10% of the entity

- Other
- 6. If the organization is owned by another, click the Add an Organization button. The Add Organization window opens, and the Organization Name can be entered on that screen.
- 7. In the Senior Managers section, select a Senior Manager in the Add Existing Contact drop-down field. Multiple selections can be made. **Note:** At least one Senior Manager must be selected in this field.

Principal Owners

There are no listed owner (s) because (select one) :

☐ The entity is not-for-profit
 ☐ The entity is an individual
 ☐ No individual or organization owns more than 10% of the entity
 ☐ Other

Add Existing Contact

Individual Owners:

Add an Organization

Organization Owners

0 Result(s)

Senior Managers

Add Existing Contact

- 8. Click the Save button near the top of the page.

City Wide Bidder List Vendor's proposal

Your Proposal Info

Save Save and Close Close Cancel this response Duplicate Response

Complete the Subcontractors and Joint Ventures Tab

The Subcontractors and Joint Ventures tab is where you identify any applicable joint ventures or M/WBE certified subcontractors in connection with the RFX and enter corresponding information, if applicable.

Subcontractors and Joint Ventures identified in this tab will count towards the M/WBE Participation Goals, found in this tab and the M/WBE Requirements tab, if they carry an applicable M/WBE certification.

1. Go to the Subcontractors and Joint Ventures tab in the left navigation.
2. Read the instructions in the M/WBE Requirements section.

Your Proposal Info

Questionnaire

Item 1

Subcontractors and Joint Ventures

LL34 Compliance

Save Save and Close Close Cancel this response Duplicate Response

Subcontractors and Joint Ventures

M/WBE REQUIREMENTS

INSTRUCTIONS 2

Please see below the M/WBE Participation Goals determined for this solicitation that must be met by your organization.

The Total Participation Goals table displays the percentages of work that shall be completed by NYC Certified M/WBEs.

Your own organization's (prime vendor) M/WBE certification status will automatically be displayed in the field directly below this text labeled as **"Prime Vendor M/WBE Certification,"** and shall count towards the Total Participation Goals. Any participation goal(s) your organization *cannot* meet through its own certification(s) must be met by subcontractors and/or joint ventures. Please identify all subcontractors and/or joint ventures with their M/WBE certifications in the Subcontractor Information and Joint Venture sections below.

Note: Please keep in mind that the percentages reflect the **minimum** requirements for M/WBE participation. For example, if there is a "Women" (WBE) owned business participation requirement of 10%, then a WBE certified organization must perform at a *minimum* 10% of the proposal or bid amount.

To identify your M/WBE certified subcontractors and/or joint ventures, please make sure to first complete the "Item" tab (and click **Save**). Once the Item tab is completed, please click the **Subcontractors and Joint Ventures** tab and review the participation goals for your organization. Please address any alerts (in red) displayed alongside the relevant participation goal(s) for your organization. After all alerts are addressed, they shall automatically disappear from the Subcontractors and Joint Ventures tab and no longer block your RFX submission.

After all tabs and their required fields are reviewed and completed, you may submit your RFX by clicking **Validate & Submit**.

For detailed instructions, refer to the [Finding and Responding to RFX](#) guide listed [here](#).

Step 1: Review the M/WBE Participation Goals

If the RFX has M/WBE Participation Goals, your own organization's M/WBE certification(s) count towards the Total Participation Goals and automatically display in the Prime Vendor M/WBE Certification field directly below the Instructions.

Any M/WBE participation goals that remain unmet are highlighted with orange text alerts displaying to the right of the M/WBE Participation Goals table.

1. In this example, the Prime Vendor does not have any M/WBE Certifications displaying (the field is blank) and thus still needs to meet the requirements as indicated.

City Wide Bidder List Vendor's proposal

Save Save and Close Close Cancel this response Duplicate Response

1 Prime Vendor M/WBE Certification :

Group	Percentage
Black American	10.00
Hispanic American	
Asian American	
Native American	
Unspecified	
Women	
Total Participation Goals	10.00

Black American M/WBE Requirements are not yet met.

Note: Any participation goal(s) an organization cannot meet through its own certification(s) must be met by identifying subcontractors and/or joint ventures with the required certifications.

Step 2: Add a M/WBE Certified Subcontractor(s)

1. Click the Add Subcontractor button in the Subcontractor Information section.

Subcontractor Information

Add Subcontractor 1

0 Result(s)

Then, follow the steps in the section that applies to your situation:

- Case: I have identified the subcontractor and they are Filed in PASSPort
- Case: I have not identified the subcontractor and/or they are not Filed in PASSPort

Case: I have identified the subcontractor and they are Filed in PASSPort

1. In the Subcontract Information section, complete the required fields marked by a red asterisk (*).

Note: The Subcontractor Dollar Amount value is calculated against the Proposal Amount in the Item tab to determine the percentage towards the M/WBE Goal Participation for this RFx.

2. In the Vendor Information section, select the name of the vendor in the Select PASSPort Vendor drop-down field.

The screenshot shows the 'Add Subcontract' form. At the top right are 'Save' and 'Close' buttons. Below the title, there is a 'Proposal ID' field with the value 'Proposal # 1'. The form is divided into two main sections: 'Subcontract Information' and 'Vendor Information'. In the 'Subcontract Information' section, the 'Subcontractor Dollar Amount' field is set to '24500' and is highlighted with a red circle and an arrow. The 'Purpose' field contains 'Textile Consulting'. The 'Estimated Start Date' is '2/3/2025' and the 'Estimated End Date' is '2/28/2025'. The 'M/WBE Certification' field is empty. In the 'Vendor Information' section, there is a checkbox for 'Subcontractor not filed in PASSPort or not yet identified'. Below it is a 'Select PASSPort Vendor' drop-down menu, which is highlighted with a red circle and contains the text 'Vendor Name'. The 'EIN' field is empty. A red bracket on the left side of the 'Subcontract Information' section is labeled with a red circle containing the number '1'. A red circle containing the number '2' is next to the 'Select PASSPort Vendor' drop-down menu.

3. Click the Save button near the top of the page.

This close-up view of the 'Add Subcontract' form header shows the title 'Add Subcontract' on the left. On the right, there are 'Save' and 'Close' buttons. The 'Save' button is highlighted with a red circle and a red box, and is labeled with a red circle containing the number '3'.

The organization's M/WBE Certification and EIN auto-populate in the relevant fields.

4. Click the Close button to return to the Subcontractors and Joint Ventures tab.

Add Subcontract

4

Save Close

Proposal ID
Proposal # 1

Subcontract Information

Subcontractor Dollar Amount*
24,500.00

Purpose*
Textile Consulting

Estimated Start Date ⓘ*
2/3/2025

Estimated End Date ⓘ*
2/28/2025

M/WBE Certification
Black American

Vendor Information

☐ Subcontractor not filed in PASSPort or not yet identified

Select PASSPort Vendor
Vendor Name

EIN
098713158

Case: I have not identified the subcontractor and/or they are not Filed in PASSPort

In this case, vendors will click the Subcontractor not filed in PASSPort or not yet identified checkbox to manually enter subcontractor information.

There are three scenarios in which vendors would click the Subcontractor not filed in PASSPort or not yet identified checkbox:

- Scenario 1: The subcontractor has a PASSPort account but is not Filed.
- Scenario 2: The subcontractor does not have a PASSPort account.
- Scenario 3: A specific subcontractor has not yet been identified, and this serves as a placeholder to meet a specific participation goal.

Follow the steps below to manually enter subcontractor information:

1. In the Subcontract Information section, complete the required fields marked by a red asterisk (*).
2. In the Vendor Information section, click the Subcontractor not filed in PASSPort or not yet identified checkbox and complete the following fields:
 - EIN
 - Subcontractor Name
 - Subcontractor Address
 - Subcontractor Phone

- M/WBE Certification (now editable in the Subcontract Information section)

Add Subcontract

Save

Close

Proposal ID
 Proposal # 1

Subcontract Information

Subcontractor Dollar Amount *

24500

Purpose *

Textile Consulting

Estimated Start Date ⓘ *

2/3/2025

Estimated End Date ⓘ *

2/28/2025

M/WBE Certification *

Black American

Vendor Information

☒ Subcontractor not filed in PASSPort or not yet identified

EIN

Subcontractor Name

Subcontractor Address

Subcontractor Phone

3. Click Save.
4. Click Close to return to the Subcontractors and Joint Ventures tab.

Add Subcontract

3

4

Save

Close

Step 3: Add a Joint Venture

If applicable, add a Joint Venture.

1. Click the Add Joint Venture button in the Joint Venture section.

Joint Venture

Add Joint Venture

1

2. Select the vendor's name in the Select PASSPort Vendor drop-down field. The organization must be filed in PASSPort.

The screenshot shows the 'Joint Venture' form interface. At the top right, there are three buttons: 'Save', 'Save and Close', and 'Close'. On the left side, there is a section titled 'Add Vendor' with a dropdown arrow. Below this, there is a 'Proposal ID' field containing 'Proposal # 1'. Underneath that is a 'Select PASSport vendor' label followed by a red asterisk. A red box highlights the dropdown menu for this field, and a red circle with the number '2' is placed next to it.

3. Click the Save button near the top of the page.

This screenshot shows the same 'Joint Venture' form. The 'Save' button, located at the top right of the form area, is now highlighted with a red box. A red circle with the number '3' is positioned above the button.

4. Complete the Ownership % and M/WBE Certification fields.

Add Vendor

To change the PASSport Vendor, please delete this record and add a new joint venture

Proposal ID

Proposal # 1

Select PASSport vendor

Vendor Name

Ownership %

60

M/WBE Cetification

Black American

Status

Valid

Total

- Click the Save button near the top of the page.

Joint Venture

5

Save

Save and Close

Close

PASSPort automatically populates the Total amount covered by the joint venture based on the Ownership % entered compared to the Proposal Amount (see Item tab).

In this example, the joint venture partner entity selected has 60% ownership which calculates here to equal \$147,000 in total of the full \$245,000 Proposal Amount.

Select PASSport vendor

Vendor Name

Ownership %

60.00

M/WBE Cetification

Black American

Status

Valid

Total

147,000.00

- Once participation goals are met and all alerts are addressed, the alerts no longer display.

Note: For vendors with multiple M/WBE certifications, please note that only one certification can be entered at a time. To add an additional certification, please repeat the Add a Subcontractor or Add a Joint Venture steps to meet additional participation goals.

If any information entered requires updating in an added Subcontractor or Joint Venture record, delete the record by clicking the trash icon and re-add it with the updated information.

Subcontractor Information

Add Subcontractor

M/WBE Certification	Subcontractor Dollar Amount	EIN	Estimated End Date	Estimated Start Date	Purpose	Subcontractor Address	Subcontractor Phone
Black American	24,500.00		2/28/2025	2/3/2025	Textile Consulting		
1 Result(s)							

Joint Venture

Add Joint Venture

Owner Participation	Vendor Name	M/WBE Certification
60.00		- Black American - Women
1 Result(s)		

The M/WBE Requirements Tab (Read-Only)

The M/WBE Requirements tab appears for procurements with an M/WBE goal and ensures compliance with M/WBE regulations. For more details on the M/WBE program related to this solicitation, please refer to the Local Law 1 Notice to All Prospective Contractors.

This tab is read-only and does not require any data entry.

If any information in the M/WBE Requirements tab is incorrect, please update it through the Subcontractors and Joint Ventures tab as needed.

City Wide Bidder List Vendor's proposal

Save Save and Close Close Cancel this response Duplicate Response

⏪

Your Proposal Info
Questionnaire
Documents
Item
Subcontractors and Joint Ventures
M/WBE Requirements

✓ M/WBE Requirements

Group	Percentage
Black American	10
Hispanic American	
Asian American	
Native American	
Women	
Unspecified	
Total Participation Goals	10

✓ Your M/WBE Subcontracts

M/WBE Certification Type	Anticipated Subcontractor Amount	Purpose	Estimated Start Date	Estimated End Date
Black American	24,500.00	Textile Consulting	2/3/2025	2/28/2025
24,500.00				
1 Result(s)				

How To Submit a Request for Waiver of M/WBE Participation Requirement

If necessary, a waiver of the M/WBE participation requirement can be submitted via the Discussion Forum of the RFx.

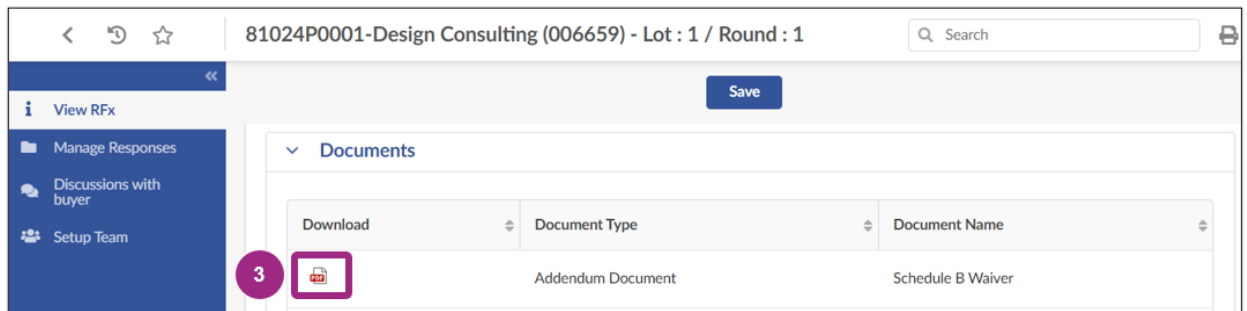
A copy of the Schedule B form can be found in the Documents section of the RFx. The Vendor Contract History Excel template is linked in Part 3 of the Schedule B form.

Follow these steps to submit a Waiver Request to the Agency:

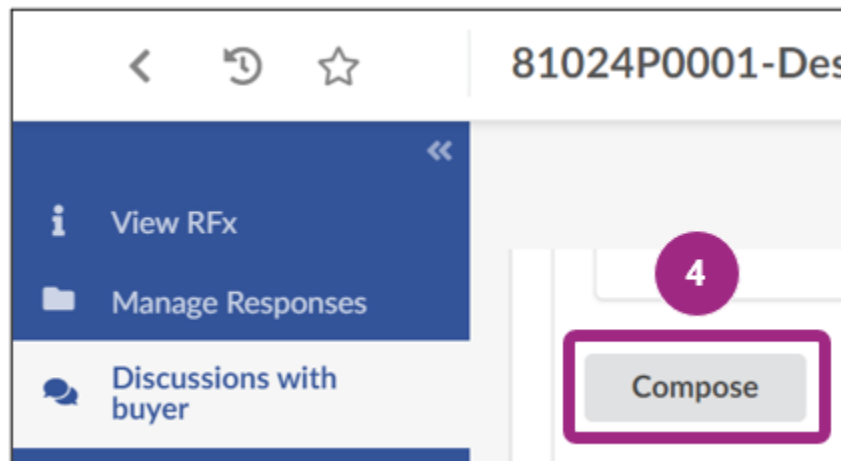
1. Click Save and Close to close out of the proposal window.
2. Go to the View RFx tab.



3. Scroll down to the Documents section, download the Schedule B form, and complete Part 3.



4. Go to the Discussion with Buyer tab and click the Compose button to start a draft message to the agency.



5. Select Clarification in the Type drop-down field.
6. Type a subject in the Subject field such as "Schedule B Waiver Submission".
7. Select Agency Contact from the unlabeled drop-down field.
8. Type your message in the unlabeled text field.
9. Click the Click or Drag to add files button and upload the completed Schedule B - Part 3 form and the completed Vendor Contract History Excel document.
10. Click the Send button to submit your message and its attachments to the Agency Contact.

81024P0001-Design Consulting (006659) - Lot : 1 / Round : 1

Keywords

Compose

0 Result(s)

Type*

From

Subject*

Agency Contact

Hello,

Please see attached completed Schedule B Waiver and Vendor Contract History Excel document.

Best,

Vendor Contact

The agency will review the waiver and the result of the agency's waiver determination will be reflected in PASSPort in both the M/WBE Requirements tab and the Subcontractor and Joint Ventures tab of your RFX response. For additional information, see Local Law 1 Notice to All Prospective Contractors.

Submit Your RFX Response

After your response is filled out and all required information has been provided, the response can be submitted.

1. Click the green Validate & Submit button near the top of the page.

Your Proposal Info

A Do you really want to submit your proposal? pop-up window opens.

2. Read the statement carefully then click the checkbox at the bottom left of the window to sign off on the response and confirm that the response content is accurate upon submission.

Important: After you submit your proposal, you will not be able to retract or modify your response. Please be sure to review your work carefully before submitting!

3. Click the Submit my proposal button in the bottom right corner of the window.

Do you really want to submit your proposal?

Once an offer is submitted, it cannot be modified. You will only be able to create a new one.

- 2 / 2 items have been filled.
- 2 / 2 questions have been filled.
- 1 document(s) have been attached to the proposal. (Questionnaires)
- Total number of attached documents: 1

By submission of this Bid or Proposal, I hereby certify:

- The person submitting this bid or proposal (the "signatory"), is of lawful age, and is signing as an individual bidder or proposer or as an officer or partner or representative of a corporation, partnership, firm, organization, or joint venture placing the bid or proposal.
- That I have read and reviewed all documents and information contained within the Solicitation, including any instructions and terms and conditions attached to this Solicitation.
- I acknowledge receipt and review of all Addenda and Amendments to this Solicitation.
- That the Bidder/Proposer meets the minimum qualification requirements established for this Solicitation.
- That the Bidder/Proposer agrees to all material terms of the Solicitation and/or contract, including all representations and warranties.
- To the extent applicable, I further hereby:
 - acknowledge my understanding of the M/WBE participation requirements as set forth herein and the pertinent provisions of Section 6-129 of the Administrative Code of the City of New York ("Section 6-129"), and the rules promulgated thereunder;
 - affirm that the information supplied in support of this M/WBE Utilization Plan is true and correct;
 - agree, if awarded this Contract, to comply with the M/WBE participation requirements of this Contract, the pertinent provisions of Section 6-129, and the rules promulgated thereunder, all of which shall be deemed to be material terms of this Contract;
 - agree and affirm that it is a material term of this Contract that the Vendor will award the total dollar value of the M/WBE Participation Goals to certified MBEs and/or WBEs, unless a full waiver is obtained or such goals are modified by the Agency; and
 - agree and affirm, if awarded this Contract, to make all reasonable, good faith efforts to meet the M/WBE Participation Goals, or if a partial waiver is obtained or such goals are modified by the Agency, to meet the modified Participation Goals by soliciting and obtaining the participation of certified MBE and/or WBE firms.
 - agree and affirm that I have read and understand all items contained in the associated Prequalification Questionnaire and certify that as of this date, these items have not changed, or such changed items have been provided with this bid or proposal

2



clicking this checkbox you are signing off the response and confirming that its contents are accurate.

3

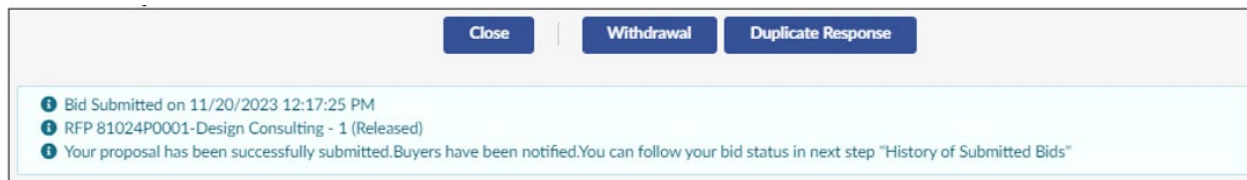
Cancel

Submit my proposal

Are you receiving a blocking alert when trying to submit your response? Here are some common reasons for this issue:

- Incomplete Required Fields: Ensure all required fields are filled out by carefully reviewing each tab in the RFx.
- Incorrectly Completed Fields: Ensure the LL34 Compliance tab has been completed correctly.
- Competition Pool Not Selected: At least one Competition Pool must be selected in the Your Proposal Info tab.
- RFx Closed by the Agency: The RFx may have been closed by the agency and is no longer accepting submissions. Remember to submit responses at least 48 hours before the due date.

The screen will refresh, displaying a system message confirming that the response has been successfully submitted.

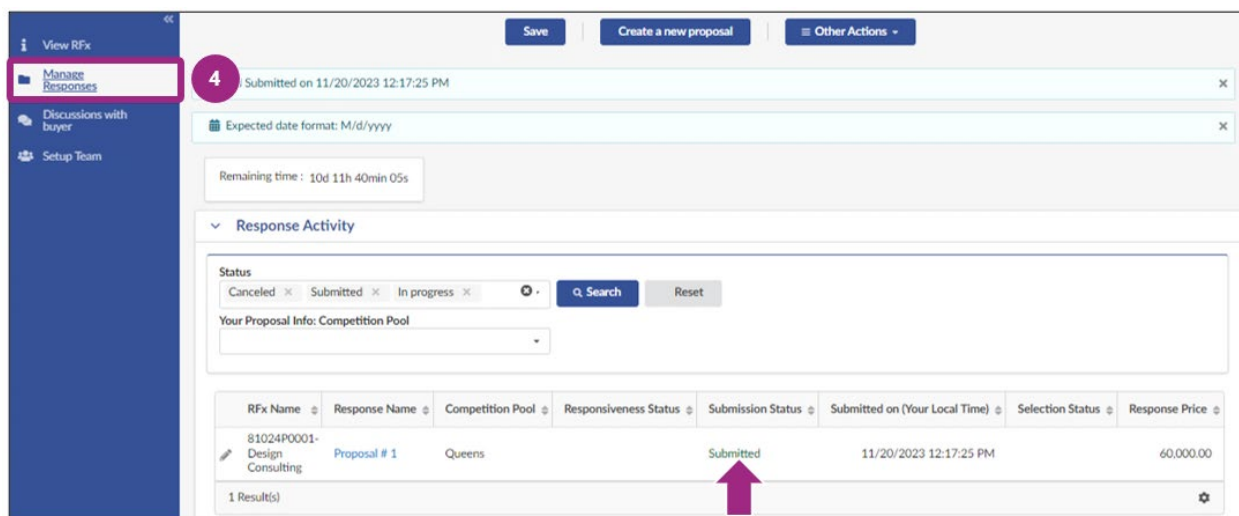


A system message box with a light blue background and a gray border. At the top, there are three buttons: "Close", "Withdrawal", and "Duplicate Response". Below the buttons, there are three informational messages, each preceded by a blue "i" icon:

- Bid Submitted on 11/20/2023 12:17:25 PM
- RFP 81024P0001-Design Consulting - 1 (Released)
- Your proposal has been successfully submitted. Buyers have been notified. You can follow your bid status in next step "History of Submitted Bids"

4. Take a moment to navigate to the Manage Responses tab and confirm that the Submission Status updated from In Progress to Submitted.

Congratulations! You successfully submitted the RFx response!



A screenshot of the "Manage Responses" interface. The left sidebar has a "Manage Responses" tab highlighted with a red box. The main content area shows a response that has been submitted. At the top, there are buttons for "Save", "Create a new proposal", and "Other Actions". Below these, there is a notification bar with a red circle containing the number "4" and the text "Submitted on 11/20/2023 12:17:25 PM". Below the notification bar, there is a section for "Response Activity" with a search bar and a "Reset" button. Below the search bar, there is a table with the following columns: RFx Name, Response Name, Competition Pool, Responsiveness Status, Submission Status, Submitted on (Your Local Time), Selection Status, and Response Price. The table contains one row with the following data:

RFx Name	Response Name	Competition Pool	Responsiveness Status	Submission Status	Submitted on (Your Local Time)	Selection Status	Response Price
81024P0001-Design Consulting	Proposal # 1	Queens		Submitted	11/20/2023 12:17:25 PM		60,000.00

A red arrow points to the "Submitted" status in the table. Below the table, there is a footer with the text "1 Result(s)" and a gear icon.

Need to edit a submitted response?

- For RFx in Released status:
 - Use the Duplicate Response button to create a copy of your submitted response. Edit as needed and submit. Then, click into the incorrect

response (originally submitted response) and click the red button to withdraw your first response.

- For RFx in Responses Received status:
 - The Agency no longer accepts responses. The vendor cannot revise or retract their submitted responses.

Duplicate an RFx Response

Once the initial response is submitted, vendors have the option to duplicate their RFx response.

This option creates a copy of the response that can be edited and used for subsequent competition pools, or to submit updated information related to an RFx addendum.

Responses can be worked on simultaneously by contacts listed in the Setup Team.

To proceed with this option, follow these steps:

1. Click the Other Actions button at the top of the RFx page.
2. In the drop-down, select Duplicate Response.

The screenshot shows the '81024P0001-Design Consulting (006659) - Lot : 1 / Round : 1' page. The 'Other Actions' dropdown menu is open, showing 'Duplicate Response' and 'Recover my last offer'. The 'Duplicate Response' option is highlighted with a red box and a red circle labeled '2'. The 'Other Actions' button is labeled with a red circle labeled '1'. The 'Response Activity' section shows a table with columns: RFx Name, Response Name, Competition Pool, Responsiveness Status, Submission Status, Submitted on (Your Local Time), Selection Status, and Response Price. The table contains one row for '81024P0001-Design Consulting' with 'Proposal # 1' as the response name, 'Bronx' as the competition pool, 'Submitted' as the status, and '1/29/2024 12:28:38 PM' as the submission time. The response price is '60,000.00'. Below the table, it says '1 Result(s)'.

RFx Name	Response Name	Competition Pool	Responsiveness Status	Submission Status	Submitted on (Your Local Time)	Selection Status	Response Price
81024P0001-Design Consulting	Proposal # 1	Bronx		Submitted	1/29/2024 12:28:38 PM		60,000.00

The List of Responses window opens.

3. Locate the response you would like to duplicate, scroll to the right, and click the Duplicate this proposal icon.

List of Responses

Round: 81024P0001-Design Consulting 1 ✕ ⊕ Q Search Reset Status: Canceled ✕ Submitted ✕ In progress ✕ ⊕

Filters Round: 81024P0001-Design Consulting 1 ✕ Status: Canceled ✕ Submitted ✕ In progress ✕

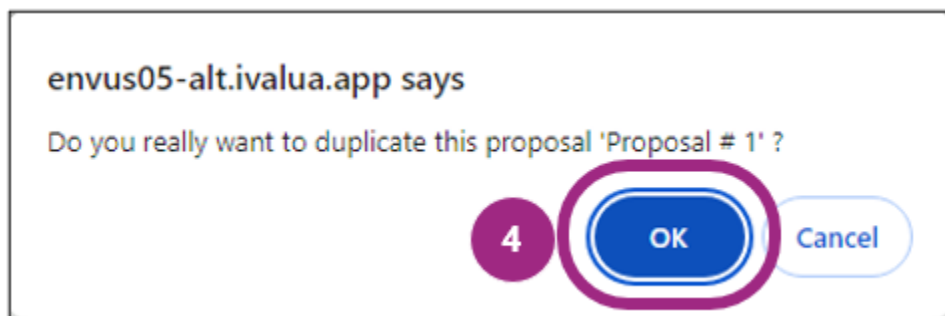
➡ 0 Selected

☐	Requests	Label	Submission Status	Response Progress	Competition Pool	Submitted on (Your Local Time)	Response Price
☐	81024P0001-Design Consulting - 1	Proposal # 1	Submitted	100%	Bronx	1/29/2024 12:28:38 PM	60,000.00

1 Result(s)

A pop-up window appears at the top of the page.

- Click the OK button to continue.



- The page refreshes, and an exact copy of the response appears in the Manage Responses tab. Change the Response Name to your preferred title.

RFX Name	Response Name	Compe	ool	Responsiveness Status	Submission Status	Submitted on (Your Local Time)	Selection Status	Response Price
81024P0001-Design Consulting	Copy of Proposal # 1			In progress				
81024P0001-Design Consulting	Proposal # 1	Bronx		Submitted		1/29/2024 12:28:38 PM		60,000.00

2 Result(s)

Alternatively, to create a new (blank) response instead of duplicating an existing one, click the Create a New Proposal button at the top of the RFX page which becomes available only after the initial response is submitted. Be sure to change the default Response Name to your preference.

< ↶ ☆ 81024P0001-Design Consulting (006659) - Lot : 1 / Round : 1 🔍 Search 🖨		View RFX Manage Responses Save Create a new proposal Other Actions ▾					
		Response Activity					
RFX Name ▾	Response Name ▾	Competition Pool ▾	Responsiveness Status ▾	Submission Status ▾	Submitted on (Your Local Time) ▾	Selection Status ▾	Response Price ▾
81024P0001-Design Consulting	Proposal # 2			In progress			
81024P0001-Design Consulting	Proposal # 1	Bronx		Submitted	1/29/2024 12:28:38 PM		60,000.00
2 Result(s)							⚙

Next Steps

The RFX Response Selection Status will be updated once agency award selections are finalized:

- **Selected:** Your organization has been selected for an award. The contracting agency will reach out to you with next steps.
- **Not Selected:** Your organization was not selected for an award.

Note: This process may take several weeks or even months, as responses undergo a thorough evaluation before award selections are made. Vendors will be notified if awarded a contract.