INSTRUCTIONS FOR RESPONDING TO THE RFP (RFX)

This quick guide will walk you through how to view and respond to an RFx. An RFx is a request for anything. In PASSPort, an RFx will be synonymous with the solicitation that will go out to vendors. This will include a Request for Proposal (RFP).

If you have questions about the details of the RFx, please contact the designated **Agency Contact** located within the **View RFx tab**. If you have questions about functionality of PASSPort, please contact our Service Desk at help@mocs.nyc.gov.

Please identify which profile you have been assigned using the table below. This will help guide your navigation through the RFx.

VENDOR USER PROFILES

PASSPort enables vendors to have multiple profiles in which to complete the relevant tasks for their workstream. The user profiles that can create and submit responses to an RFx are detailed in the table below. Importantly, users from the vendor organization can be added to specific responses to contribute any helpful information.

<table>
<tr><th>Profile</th><th>Description/Authorizations</th></tr>
<tr><td>Vendor Admin</td><td>• Can manage contacts in the Vendor Profile
• Receive direct invite to participate in RFx
• Can add users to the vendor team
• Can create a response</td></tr>
<tr><td>Vendor Procurement L1</td><td rowspan="2">• Receive direct invite to participate in RFx
• Can add users to the vendor team
• Can create a response</td></tr>
<tr><td>Vendor Procurement L2</td></tr>
<tr><td>Vendor Financials L1</td><td rowspan="3">• Can create/edit responses when added to the team in the Setup Team Tab</td></tr>
<tr><td>Vendor Financials L2</td></tr>
<tr><td>Contributor</td></tr>
<tr><td>Vendor Contract Signatory</td><td>• Can create/edit responses when added to the team (Can sign the authored contract agreement at the Contract stage)</td></tr>
</table>

If you have any questions about vendor user profiles, please contact our Service Desk at help@mocs.nyc.gov.

SUBMITTING RESPONSES

Login to PASSPort

1. You will receive a notification from PASSPort inviting you to respond to an opportunity created by an agency (RFx).

2. Click on the link in the notification to login into PASSPort and access the RFx. Alternatively, click on this link to access PASSPort.

View My RFx and Responses

3. Once logged in, click on the **RFx** menu option on the blue header bar at the top of the screen.

4. Select either **Browse All RFx** (includes all RFx visible on the Public Portal) or **Browse Your RFx and Responses** (includes the RFx to which you have been invited or have started a draft response).

5. You can locate your opportunities by filtering RFx status, keywords, agency, etc.

6. To open an opportunity or response, click on the pencil icon  in the row.

View RFx & Acknowledgement

7. Review the details of the RFx in the **View RFx** tab. If you have questions about the RFx, contact the designated Agency Contact found on this page.

8. Communicate with the agency if you plan on responding to the opportunity by completing the **Acknowledgement** tab. If no acknowledgement is required, move on to step 9.

Manage Responses

9. Navigate to the **Manage Responses** tab.

10. Click on the pencil icon  to open the Response window.

Manage Responses // Your Proposal Info

This tab is designed to function as the header for your response and will include fields to input a response name and description and select a competition pool. If you are submitting to multiple Competition Pools, you must complete individual responses for each Competition Pool.

11. In the **Your Proposal Info** tab, complete the Response Label, Description and Competition Pool fields. You can rename the Response Label. If you choose not to, it will default to “Proposal #1”

12. Click the **Save** button.

Manage Responses // Questionnaire

The questions within this tab were designed in-system by the Agency to best reflect the information required for you to submit as part of your response. When completing the Questionnaire, please note the different ways you are expected to answer (date, multiple choice, text, etc.) and be sure that the answers are completed to the best of your ability before submitting. Questions denoted with the **red bar** in the response field are mandatory. Note, you will not be able to submit your responses if you do not answer all the required questions.

13. Click on the **Questionnaire** tab.

14. Complete all necessary questions within this tab. Questions may be organized into a series of subtabs and subsections.

15. Click the **Save** button.

Alternatively, you can download the Questionnaire into an Excel file and complete it outside of PASSPort, but it must be reuploaded with the appropriate answers and format for the Questionnaire to be marked as responsive. Should you wish to draft your responses in Excel, click either the "Download in Excel 2007-2010 format (xlsx)" or "Download in Excel 97-2003 format (xlsx)". To reupload the completed Excel file, click on "Upload (in Excel Format)".

Please note that editing the structure of the excel sheet might prevent successful reupload, so please be careful when submitting with this method. You should only edit the fields designated for vendor response.

Manage Responses // Subcontractors and Joint Ventures

If the solicitation allows subcontracting or if you will be submitting as part of a joint venture, you will identify subcontractors and join ventures in this tab. If the RFx does not require subcontracting, the tab will display the following language, "Subcontracting is not allowed for this RFx". If there are no subcontractors or joint ventures, move on to Step 20.

16. Click on the **Subcontractors and Joint Ventures** tab.

17. In the **Subcontractor Information** tile, complete all the necessary fields (if applicable).

18. In the **Joint Ventures** tile, click on the **Add Joint Ventures** button, and complete the necessary fields (if applicable).

19. Click the **Save** button.

Manage Responses // Item Tab

The **Item** tab functions as the price component for solicitation. When filling out the **Item Tab**, be careful to answer each line item according to the information it asks, such as annual salaries, price per a designated quantity, or dates. Note, rows and columns will be designated as either "optional" or "required." You will not be able to submit your proposal if you do not input data into all the required fields. Also, please be aware of the total proposal amount, located above the response fields. This total amount is automatically calculated based on the information you provide in the response fields.

20. Click on the **Item** tab.

21. Complete all necessary fields in the **Item** tab.

22. Click **Save** button.

Alternatively, you can download the Item Tab into an Excel file and complete it outside of PASSPort, but it must be reuploaded with the appropriate answers and format for the configured Items Tab to be marked as responsive. Should you wish to draft your responses in excel, click either the “Download in Excel 2007-2010 format (xlsx)” or “Download in Excel 97-2003 format (xlsx)”. To reupload the completed Excel file, click on “Upload (in Excel Format)”.

Please note that editing the structure of the excel sheet might prevent successful reupload, so please be careful when submitting with this method. You should only edit the fields designated for vendor response.

Manage Responses // LL34 Compliance

This tab allows you to submit your Local Law 34 (Doing Business Data) as part your response to the solicitation. The *Vendor Admin* will identify all LL34 Contacts within the Vendor Record. Please make sure that all information is correct with appropriate names, titles, and other necessary information before you submit.

23. Click on the **LL34 Compliance** tab.

24. In the **Principle Officers** tile, complete all the necessary fields.

25. In the **Principle Owners** tile, complete all the necessary fields.

26. In the **Senior Managers** tile, complete the necessary field.

27. Click the **Save** button.

Submit your Response

23. Click on the **Check Progress** button to review your progress. PASSPort will alert you to what needs to be completed. Please note that this will review progress of completion for the RFx, not the content within the RFx itself.

24. Once all sections are complete, a new green button will appear called the **Validate and Submit** button. Click on this button to submit your response.

25. In the pop-up, review the terms and conditions, select the checkbox, and click on the **green Submit my proposal** button. Your response will be submitted.

26. Click on the **Close** button. The **Manage Response** tab will update with a summary of your response. The Agency will be notified of your proposal submission.