



Finding and Responding to RFx for Vendors

Roles Involved:

- Vendor Admin
- Vendor Procurement L1 & L2

Summary:

Step-by-step instructions on identifying and responding to contracting opportunities and requests for information in PASSPort.

Last Updated: July 6, 2020

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About PASSPort

PASSPort, the City of New York's Procurement and Sourcing Solutions Portal, facilitates an end-to-end digital procurement process that is transparent and easy to access. Designed with and for vendors, PASSPort leverages technology to address long-standing procurement issues, establish a timelier procurement process and make it easier to do business with the City of New York. PASSPort allows for online solicitations and awards, as well as contract execution, registration, and management.

Accessing PASSPort

To access PASSPort and log in, go to: www.nyc.gov/passport

Adjusting Font Size. While navigating PASSPort, you can easily increase its font size to improve readability. To increase the font size, zoom in by holding down the "Ctrl" key while pressing the plus ("+") key (press it as often as needed) on your keyboard. To zoom out, hold down the "Ctrl" key while pressing the minus ("-") key. To reset to the default fonts size, hold "Ctrl" and press zero ("0"). Mac users want to use "Command" instead of "Ctrl."

Tool Tips. There are tool tips available throughout PASSPort that provide quick and helpful information relevant to specific fields. Tool tips can be accessed by hovering over the Information ⓘ icon.

Required Fields. Some information fields are required in PASSPort. These are indicated by a red marker. A user will receive a blocking alert (indicated by a red circle icon) if submitting incomplete information. Users will complete these fields. When all required information is entered, the blocking alert will clear (i.e., no longer be displayed) and the user will be able to submit successfully to proceed.

1. Finding and Responding to RFx Overview

This user manual provides you with step-by-step instructions for finding and responding to RFx in PASSPort.

RFx is a PASSPort term that represents the range of City solicitations, including Requests for Information, Requests for Proposals, and Invitations to Bid. PASSPort provides a digital repository of all RFx, searchable by keyword, commodity, agency, program, industry, and more. PASSPort also enables the electronic submission of responses to RFx through simplified digital questionnaires.

Note:

City Record Online (CROL): Key information about upcoming RFx in PASSPort will be published in CROL. Vendors will continue to receive notifications through CROL if they signed up for CROL email alerts.

Health and Human Services (HHS) Providers: Initially, the City may release HHS Requests for Proposals (RFPs) through either HHS Accelerator or PASSPort. Providers must check both platforms to ensure awareness of all upcoming HHS RFPs. Eventually, all HHS RFPs will be released in PASSPort - MOCS will continue to keep providers apprised of developments.

Providers must be prequalified in HHS Accelerator for relevant service areas at least one week prior to responding to an HHS RFP. Prequalification takes place in HHS Accelerator. It is required for responding to HHS RFPs in both HHS Accelerator and PASSPort.

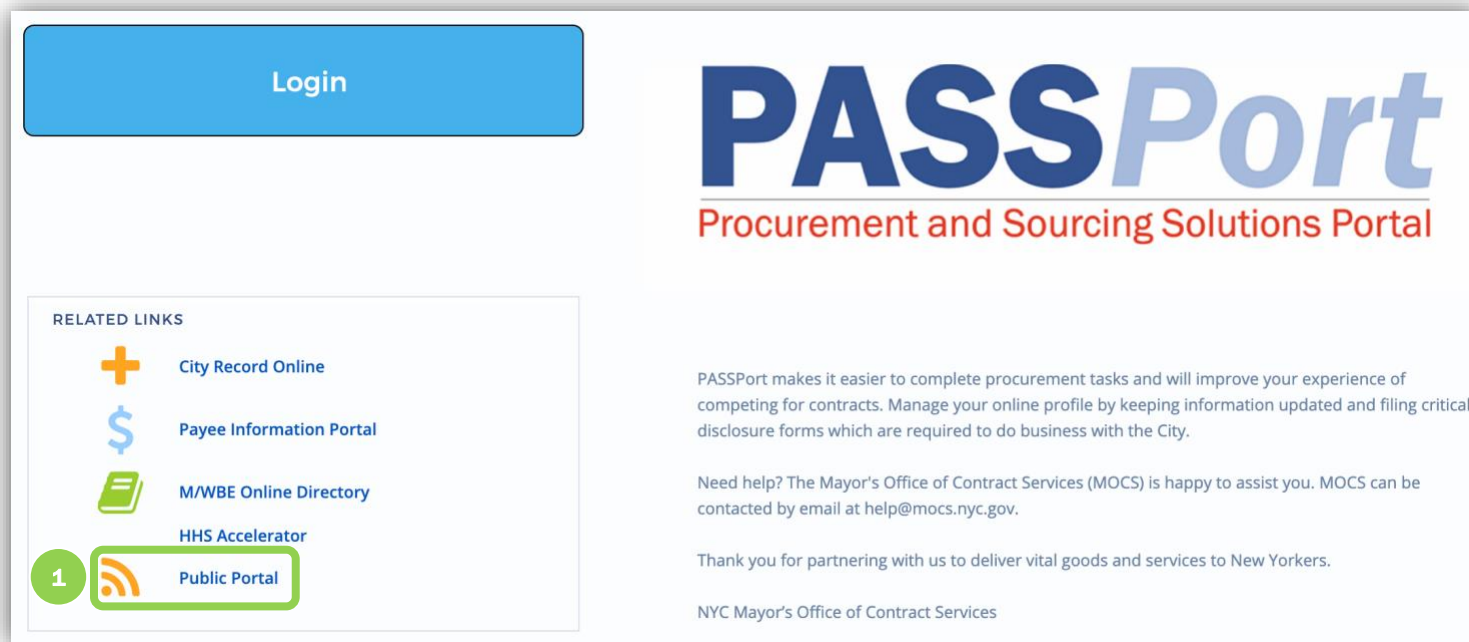
For more information and resources, visit the HHS Accelerator website at www.nyc.gov/hhsaccelerator and [Learning to Use PASSPort webpage](#). The MOCS Service Desk is available at help@mocs.nyc.gov for support.

2. Accessing the Public Portal

The PASSPort **Public Portal** provides the general public with a complete list of all RFx available in PASSPort across Mayoral agencies and some procurements issued by the Department of Education. The Public Portal, like the City Record Online (CROL), is accessible to any individual with an internet connection; you do not need to have a PASSPort account to be able to access the Public Portal. All vendors may access the Public Portal to view published RFx, however, vendors must have a PASSPort account to begin an RFx response. If you do not currently have a PASSPort account, please go to our PASSPort website at www.nyc.gov/passport for more information on creating an account.

The Public Portal is available via [PASSPort Login page](#) on the MOCS website or by the following link: passport.cityofnewyork.us.

Please follow the steps below to access and navigate the Public Portal.



In this example, we will access the Public Portal through the PASSPort login homepage at passport.cityofnewyork.us.

1. Click the “Public Portal” link.

PASSPort

Keywords : Main Commodity : RFX Status : **2**

Program : Industry : Agency :

Publish Date : Round : Additional Commodities : RFX allowing subcontractors : ☐

3

| Program | Industry | EPIN | Procurement Name | Agency | Procurement Method | RFX Status | Release Date | Due Date | Remaining time | Main Commodity |
|-------------------------|------------------------------|------------|--|--|------------------------|--------------------|--------------|------------|-------------------------|---------------------------------|
| Sanity 14-Feb | Goods | 0032010328 | 0032010328-ACCENTURE-Innovative-Competitive Sealed Bid | • BOARD OF ELECTIONS | Innovative | Selections Made | 05/19/2020 | 05/29/2020 | | Safety and Protective Equipment |
| Software_Update_prg-169 | Goods - Construction Related | 06820B0449 | 06820B0449-Req. 05/18/2020_CSB03_Cycle3_E2E_ZR | • ADMINISTRATION FOR CHILDREN'S SERVICES | | Responses Received | 05/18/2020 | 05/19/2020 | Bid due date has passed | Soil Remediation Equipment |
| Software_Update_prg-169 | Goods - Construction Related | 06820B0449 | 06820B0449-Req. 05/18/2020_CSB03_Cycle3_E2E_ZR | • ADMINISTRATION FOR CHILDREN'S SERVICES | Competitive Sealed Bid | Responses Received | 05/18/2020 | 05/19/2020 | Bid due date has passed | Soil Remediation Equipment |

The Public Portal is searchable by Keywords, Industry, Agency, Main Commodity, Program, RFX Status, and more.

- Once you input search criteria, click the **"Search"** button. The results of your search will appear.
- To view information or learn more about a specific RFX, click the **pencil icon** to open the **View RFX** screen.

View RFx

RESPONSE ACTIVITY▼

4 SUMMARY▼

E-PIN : 0032010328 05/19/2020 00:00:00

Program : Sanity 14-Feb

Agency : BOARD OF ELECTIONS

Division : BOARD OF ELECTIONS

Agency Contact : Auto Requestor

Agency Contact Email : auto_requestor@mailinator.com

RFx Title : 0032010328-ACCENTURE-Innovative-Competitive Sealed Bid

RFx Status : Selections Made

5 DESCRIPTION▼

This is a test description for requisiton

6 KEY DATES▼

Anticipated Contract Start Date : 10/01/2019

Anticipated contract end date : 10/03/2021

Release Date : 05/19/2020

Due Date : 05/29/2020

Bid Opening Date :

The **View RFx** screen provides details on the RFx, including Summary, Description and Key Dates associated with the RFx. These fields will help you learn more about this procurement.

4. The **Summary** tile provides key agency and procurement details, including Agency information and contact, RFx Title and RFx Status.

5. The **Description** tile provides an overview of the procurement, as provided by the agency.

6. The **Key Dates** tile provides details on the Anticipated Contract Start and End Dates, Release Date and Due Date.


7

BID OPENING LOCATION▼

| Address Line 1 | Address Line 2 | City | Zip Code |
|------------------|------------------|----------|----------|
| Address line One | Address line Two | New York | 12234 |

8

DOCUMENTS▼

| Download | Document Type | Document Name |
|--|---------------|----------------|
|  Book1.xlsx | RFx Document | Document Title |

1 Result(s)

OPEN BID▼

Competition Pool :

| Competition Pool | Bid Label | Bid Price | Submitted On | Vendor |
|----------------------|--------------|-----------|--------------|----------------------------|
| Competition pool-096 | Proposal # 1 | 1,125.00 | 05/19/2020 | CitywideBiddersList_Vendor |

1 Result(s)

7. The **Bid Opening Location** tile provides details pertaining to the Bid Opening, including Bid Opening Location, if applicable.

8. The **Documents** tile in the **View RFx** screen houses supplemental material provided by the contracting agency for additional context for the RFx. These documents are an opportunity for contracting agencies to elaborate beyond the high-level overview provided in the View RFx sections.

Note: To submit a response to an RFx, a Vendor **must** have a PASSPort account and log in to its PASSPort account. To create a PASSPort account, please visit our PASSPort website at www.nyc.gov/passport.

3. Browse Prequalified Lists

Prequalification allows an agency to evaluate the qualifications of vendors for the provision of particular categories of goods, services, construction, or construction-related services based on the prospective vendor's work experience, size, the estimated cost of a project, and other factors as determined by the Agency Chief Contracting Officer (ACCO), before issuing a solicitation for a specific contract. Pursuant to the New York City Procurement Policy Board Rule 3-10 and N.Y. General Municipal Law Section 103(15), prospective vendors must first prequalify for open Prequalified Lists (PQLs). Only those vendors successfully prequalified, as a result of the RFQ process, will be invited to bid or propose on these projects.

PASSPort holds a record of all PQLs across the City. A City agency may decide to issue a solicitation to a PQL for a selected RFx as a part of the sourcing process.

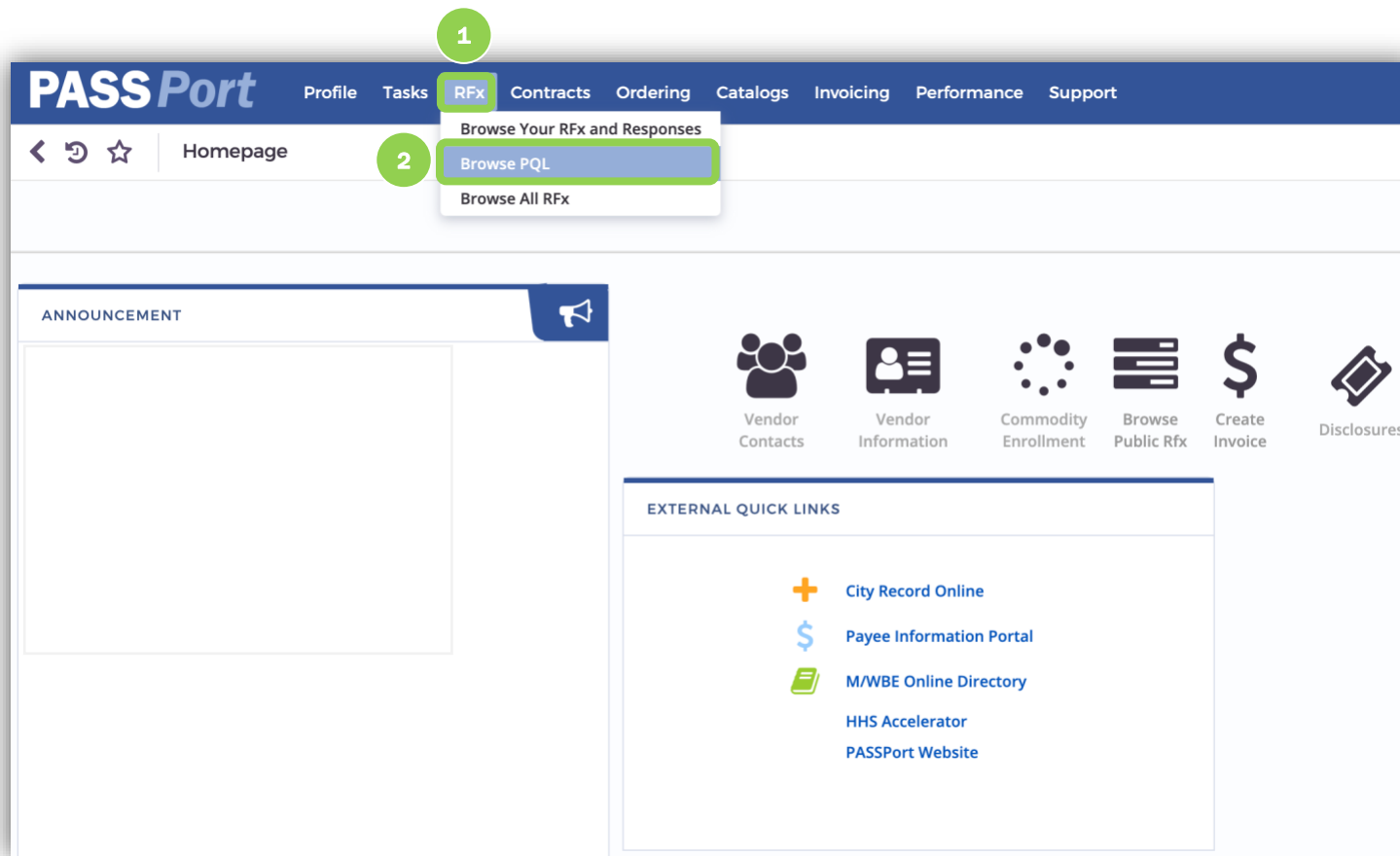
To browse all PQLs and PQLs on which your organization appears, you must first log in to your PASSPort account. Then, follow the steps below outlined in this section.

Vendors will need to work with each contracting agency to become prequalified. A future release of PASSPort will enable the management of PQLs in-system and vendor prequalification directly in PASSPort.

Health and Human Services (HHS) Providers: Initially, the City may release HHS Requests for Proposals (RFPs) through either HHS Accelerator or PASSPort. Providers must check both platforms to ensure awareness of all upcoming HHS RFPs. Eventually, all HHS RFPs will be released in PASSPort - MOCS will continue to keep providers apprised of developments.

Providers should be prequalified in HHS Accelerator for relevant service areas at least one week prior to responding to an HHS RFP. Prequalification takes place in HHS Accelerator. It is required for responding to HHS RFPs in both HHS Accelerator and PASSPort.

For more information and resources, visit the HHS Accelerator website at www.nyc.gov/hhsaccelerator and [Learning to Use PASSPort webpage](#). The MOCS Service Desk is available at help@mocs.nyc.gov for support.



The steps below outline the process for browsing PQLs in PASSPort:

1. From any page in PASSPort, click the “RFX” menu option at the top of the page.
2. Select “Browse PQL” from the drop-down menu.

PASSPort

[Profile](#)
[Tasks](#)
[RFX](#)
[Contracts](#)
[Ordering](#)
[Catalogs](#)
[Invoicing](#)
[Performance](#)
[Support](#)

[←](#)
[↶](#)
[☆](#)

Browse PQL

3

PRE-QUALIFIED LISTS

Keywords :

Org. Scope :

Q Search

Reset

Vendor :

My Pre-Qualified Lists :

| ID | PQL Name | Vendor | Date Last Updated | Agency |
|----|---------------|--------------------------------------|---------------------|---|
| 19 | DYCD PQL List | CEI Holding LLC | 04/14/2020 17:11:46 | DEPARTMENT OF YOUTH AND COMMUNITY DEVELOPMENT |
| 19 | DYCD PQL List | PAPP IRON WORKS INC | 04/14/2020 17:11:46 | DEPARTMENT OF YOUTH AND COMMUNITY DEVELOPMENT |
| 19 | DYCD PQL List | PACIFIC INTERNATIONAL GROUT COMPANY | 04/14/2020 17:11:46 | DEPARTMENT OF YOUTH AND COMMUNITY DEVELOPMENT |
| 19 | DYCD PQL List | ARCHANGEL SECURITY INTERNATIONAL INC | 04/14/2020 17:11:46 | DEPARTMENT OF YOUTH AND COMMUNITY DEVELOPMENT |
| 19 | DYCD PQL List | WAKELY CONSULTING GROUP LLC | 04/14/2020 17:11:46 | DEPARTMENT OF YOUTH AND COMMUNITY DEVELOPMENT |
| 19 | DYCD PQL List | STANDARD CONTRACTING CORP | 04/14/2020 17:11:46 | DEPARTMENT OF YOUTH AND COMMUNITY DEVELOPMENT |
| 19 | DYCD PQL List | STARTEC MECHANICAL LLC | 04/14/2020 17:11:46 | DEPARTMENT OF YOUTH AND COMMUNITY DEVELOPMENT |

- A list of all PQLs will display. This list will include prequalified lists developed and maintained by agencies.

Note for HHS Accelerator Providers: Existing HHS Accelerator prequalified lists will appear here. Providers will continue use HHS Accelerator during R3 for Prequalification.

PASSPort Profile Tasks **RFx** Contracts Ordering Catalogs Invoicing

< ↺ ☆ Browse PQL

PRE-QUALIFIED LISTS

Keywords : Org. Scope : ...

Vendor : **4** My Pre-Qualified Lists : ☒

| ID | PQL Name | Vendor | Date Last Updated | Agency |
|----|----------------|-----------------|---------------------|---|
| 12 | Navroops2ndPql | November Vendor | 08/20/2019 21:18:40 | |
| 19 | DYCD PQL List | November Vendor | 04/14/2020 17:11:46 | DEPARTMENT OF YOUTH AND COMMUNITY DEVELOPMENT |

2 Result(s)

4. Check the box next to “**My Pre-Qualified Lists**” to see all PQL lists on which your organization appears.

Reminder for HHS Providers:
HHS Accelerator prequalification lists will synchronize with PASSPort weekly. Providers should be prequalified in HHS Accelerator no later than one week prior to the RFP Due Date.

4. Browse Your RFx and Responses

The **Browse Your RFx and Responses** screen displays all active RFx your organization is working on. This includes RFx for which your organization has started a response and RFx to which an Agency has invited you to respond to through a PQL list that your organization is a part of. The section serves as a central repository for your responses for planning and monitoring purposes. You can use this section to resume working on an in-progress response or reference an existing response. The steps outlined in this section provide guidance on accessing your RFx responses.

PASSPort
Profile
Tasks
RFx
Contracts
Ordering
Catalogs
Invoicing
Performance
Support

<
↺
☆
Browse Your RFx and Responses

Keywords :
RFx Status :

Round :
Agency :
Procurement Method :
Main Commodity :

Program :
Industry :

| | Program | Industry | EPIN | Agency | Procurement Name | Procurement Method |
|--|-------------|-----------------------|------------|----------------------------|---|-----------------------------|
| | UAT Program | Construction | 85020B0274 | PUBLIC BUILDINGS | UAT CSB Sourcing Template - Sealed Subcontractor List | Competitive Sealed Bid |
| | UAT Program | Construction | 85020B0273 | PUBLIC BUILDINGS | 85020B0273 - Reconstruction of Sidewalks in Bronx and Manhattan | Competitive Sealed Bid |
| | UAT Program | Professional Services | 81620P0017 | ADMINISTRATION | 81620P0017-Management Consulting Services | Competitive Sealed Proposal |
| | UAT Program | Professional Services | 81620P0016 | DISEASE CONTROL | 81620P0011-UAT CSP GD II | Competitive Sealed Proposal |
| | UAT Program | Professional Services | 81620P0015 | DISEASE CONTROL | 81620P0011-Technical Assistance Nonprofit Management Consultant Services Rfx Demo | Competitive Sealed Proposal |
| | UAT Program | Human/Client Service | 06820B0053 | CHILD WELFARE PROGRAMS | 06820B0053-Req. 04/09/2020_UAT_OMB_Pause_Resume_<100000_ZR | Competitive Sealed Bid |
| | UAT Program | Goods | 06820P0022 | OFFICE OF THE COMMISSIONER | 06820P0022-Kapil Thakkar | Competitive Sealed Proposal |
| | UAT Program | Construction | 85020B0259 | INFRASTRUCTURE | 85020B0259-UAT CSB Award - EG - 01 | Competitive Sealed Bid |
| | UAT Program | Goods | 85620B0020 | CHIEF OF STAFF | 85620B0020-RP UAT CSB Req. 02/20/2020 | Competitive Sealed Bid |

PASSPort Profile Tasks **RFX** Contracts Ordering Catalogs Invoicing Performance Support

← ↻ ☆ Homepage

1

2

Browse Your RFX and Responses

Browse PQL

Browse All RFX

ANNOUNCEMENT

Vendor Contacts Vendor Information Commodity Enrollment Browse Public Rfx Create Invoice Disclosures

OPEN WORKFLOW TASKS 18 Results

| Edit | Process | Title | Action | Assigned date | Action's date (Your Local Time) | Status |
|------|--------------------|---|-----------------|---------------|---------------------------------|--------|
| | Contract Authoring | 85620B0237-Kapil Thakkar - authoring_doc_kapil_cincontract_03302020 | Vendor Approval | 03/30/2020 | | |
| | Contract Authoring | UAT LAW Oversight 492020 1 - test | Vendor Approval | 04/09/2020 | | |
| | Contract Authoring | UAT LAW Oversight 492020 1 - test | Vendor Approval | 04/09/2020 | | |
| | Contract Authoring | UAT LAW Oversight 3 492020 - UAT LAW Oversight | Vendor Approval | 04/10/2020 | | |
| | Contract Authoring | UAT LAW Oversight 3 492020 - UAT LAW Oversight | Vendor Approval | 04/10/2020 | | |

EXTERNAL QUICK LINKS

- City Record Online
- Payee Information Portal
- M/WBE Online Directory
- HHS Accelerator
- PASSPort Website

VENDOR CHECK LIST ⓘ

- ⓘ Account created
- ⓘ Administrator identified
- ⓘ Signatory identified
- ⓘ Commodity enrollment
- ⓘ Vendor Record Status
- ⓘ Principal identified
- ⓘ Principal Questionnaire(s) Completed

The steps below outline the process for browsing your RFX and Responses in PASSPort:

1. From any page in PASSPort, click the “**RFX**” menu option at the top of the page.
2. Select “**Browse Your RFX and Responses**” from the drop-down menu.

PASSPort Profile Tasks **RFX** Contracts Ordering Catalogs Invoicing Performance Support Lorfn L. v

← ↻ ☆ Browse Your RFX and Responses Search ...

Keywords: RFX Status: Search Reset

Round: Agency: Procurement Method: Major Commodity: Additional Commodities:

Program: Industry:

| Program | Industry | EPIN | Agency | Procurement Name | Procurement Method | RFX Status | RFX Open Date (Your Local Time) | RFX Close Date (Your Local Time) | Remaining Time |
|-------------|-----------------------|------------|----------------------------|---|-----------------------------|------------|---------------------------------|----------------------------------|-------------------------|
| UAT Program | Construction | 85020B0274 | PUBLIC BUILDINGS | UAT CSB Sourcing Template - Sealed Subcontractor List | Competitive Sealed Bid | Released | 05/11/2020 00:00:00 | 05/28/2020 15:00:00 | 3d 17h 23min 03s |
| UAT Program | Construction | 85020B0273 | PUBLIC BUILDINGS | 85020B0273 - Reconstruction of Sidewalks in Bronx and Manhattan | Competitive Sealed Bid | Released | 05/07/2020 00:00:00 | 05/28/2020 15:00:00 | 3d 17h 23min 03s |
| UAT Program | Professional Services | 81620P0017 | ADMINISTRATION | 81620P0017-Management Consulting Services | Competitive Sealed Proposal | Released | 05/07/2020 00:00:00 | 05/29/2020 00:00:00 | 4d 02h 23min 03s |
| UAT Program | Professional Services | 81620P0015 | DISEASE CONTROL | 81620P0011-Technical Assistance Nonprofit Management Consultant Services RFX Demo | Competitive Sealed Proposal | Released | 05/06/2020 00:00:00 | 05/29/2020 00:00:00 | 4d 02h 23min 03s |
| UAT Program | Human/Client Service | 06820B0053 | CHILD WELFARE PROGRAMS | 06820B0053-Req. 04/09/2020_UAT_OMB_Pause_Resume_<100000_ZR | Competitive Sealed Bid | Released | 04/28/2020 00:00:00 | 05/05/2020 00:00:00 | Bid due date has passed |
| UAT Program | Goods | 06820P0022 | OFFICE OF THE COMMISSIONER | 06820P0022-Kapil Thakkar | Competitive Sealed Proposal | Released | 04/21/2020 00:00:00 | 06/06/2020 00:00:00 | 12d 02h 23min 03s |
| UAT Program | Goods | 85620B0020 | CHIEF OF STAFF | 85620B0020-RP UAT CSB Req. 02/20/2020 | Competitive Sealed Bid | Released | 03/04/2020 21:00:00 | 04/24/2020 03:15:00 | Bid due date has passed |

7 Result(s)

- A list of all RFX will appear for which your organization has started a response and/or RFX to which an Agency has invited your organization to respond.

In this example, the search results were filtered for **Released** status RFX. Other filters include **Selections Made**, **Responses Received**, **Closed**, and **Canceled**.

5. Browse All RFx in PASSPort

Once logged into your PASSPort account, you can browse all RFx available in PASSPort through the **Browse All RFx** screen. This page contains a similar structure to the Public Portal, but now that you are logged into your PASSPort account, you will be able to respond to RFx by starting here.

A Weekly Digest email will be sent to all active PASSPort account holders providing key details for new RFx available in PASSPort. This Weekly Digest will serve as a key resource for you to keep informed of new solicitations that are available within the Browse All RFx section.

Note:

City Record Online (CROL): Key information about upcoming RFx in PASSPort will be published in CROL. Vendors will continue to receive notifications through CROL if they signed up for CROL email alerts.

Health and Human Services (HHS) Providers: Initially, the City may release HHS Requests for Proposals (RFPs) through either HHS Accelerator or PASSPort. Providers must check both platforms to ensure awareness of all upcoming HHS RFPs. Eventually, all HHS RFPs will be released in PASSPort - MOCS will continue to keep providers apprised of developments.

Providers must be prequalified in HHS Accelerator for relevant service areas at least one week prior to responding to an HHS RFP. Prequalification takes place in HHS Accelerator. It is required for responding to HHS RFPs in both HHS Accelerator and PASSPort.

For more information and resources, visit the HHS Accelerator website at www.nyc.gov/hhsaccelerator and [Learning to Use PASSPort Webpage](#). The MOCS Service Desk is available at help@mocs.nyc.gov for support.

The screenshot shows the PASSPort interface. At the top, the 'RFX' menu is highlighted with a green circle and the number '1'. A dropdown menu is visible, showing 'Browse Your RFX and Responses', 'Browse PQL', and 'Browse All RFX'. The 'Browse All RFX' option is highlighted with a green circle and the number '2'. The interface includes an announcement section, a vendor check list, external quick links, and a table of open workflow tasks.

ANNOUNCEMENT

Welcome to the Procurement and Sourcing Solutions Portal (PASSPort)!

Team: you're doing great, especially with our high volume (more than 1,000 accounts in week three)!

Please check in often, log tickets for tracking purposes and escalate to your supervisors and designated contacts as appropriate.

Visit: cityshare.nycnet/passport to access user resources such as quick reference guides and detailed manuals, or contact the MOCS Help Desk by clicking on the 'Support' tab.

VENDOR CHECK LIST

| Item | Status |
|--------------------------------------|--------|
| Account created | Yes |
| Administrator identified | Yes |
| Signatory identified | Yes |
| Commodity enrollment | No |
| Vendor Record Status | Filed |
| Principal identified | No |
| Principal Questionnaire(s) Completed | No |

EXTERNAL QUICK LINKS

- City Record Online
- Payee Information Portal
- M/WBE Online Directory
- HHS Accelerator
- PASSPort Website

OPEN WORKFLOW TASKS 18 Results

| Edit | Process | Object | Action | Forwarded on | Action's date (Your Local Time) | Status |
|------|--------------------|-------------------------------------|-----------------|--------------|---------------------------------|--------|
| | Contract Authoring | 00320N0058-Saurabh Jain - test | Vendor Approval | 02/26/2020 | | 🟡🟡🟡 |
| | Contract Authoring | 00320N0058-Saurabh Jain - test | Vendor Approval | 02/26/2020 | | 🟡🟡🟡 |
| | Contract Authoring | 12520B0002-CSB_Pinkesh_Contract - 1 | Vendor Approval | 02/28/2020 | | 🟡🟡🟡 |
| | Contract Authoring | test MMA2 Renewal #1 - ok | Vendor Approval | 03/03/2020 | | 🟡🟡🟡 |
| | Contract Authoring | SelfRegister - test | Vendor Approval | 03/06/2020 | | 🟡🟡🟡 |

METRICS TILE

| CATALOG IMPORTS | PENDING APPROVAL | CONTRACTS | CONTRACT SIGNATURES | RECONCILIATION REQUESTS |
|-----------------|------------------|------------------------|-----------------------------|-------------------------|
| | 9 | PENDING REGISTRATION 5 | SIGNATURES TASK BY VENDOR 2 | IN PROGRESS 0 |

The steps below outline the process of browsing all RFX in PASSPort:

1. From any page in PASSPort, click the “RFX” menu option at the top of the page.
2. Select “Browse All RFX” from the drop-down menu.

PASSPort Profile Tasks **RFX** Contracts Ordering Catalogs Invoicing Performance Support

[Browse All RFX](#)

Keywords:

Main Commodity:

Program:

Publish Date:

Round:

Additional Commodities:

RFX Status:

Agency:

RFX allowing subcontractors:

| Program | Industry | EPIN | Procurement Name | Agency | Procurement Method | RFX Status | Release Date | Due Date | Remaining time | Main Commodity |
|-------------|-----------------------|------------|--|----------------------------|-----------------------------|--------------------|--------------|------------|-------------------------|-------------------------------------|
| UAT Program | Standard Services | 81620P0020 | 81620P0020-BH end-to-end | PREVENTION & PRIMARY CARE | Competitive Sealed Proposal | Released | 05/19/2020 | 05/21/2020 | Bid due date has passed | Agricultural Services |
| | | 06820Y0006 | 06820Y0006-Example | OFFICE OF THE COMMISSIONER | RFI | Planned | 05/15/2020 | 05/18/2020 | Bid due date has passed | Agricultural Equipment and Supplies |
| | | 06820Y0005 | 06820Y0005-GD Example | OFFICE OF THE COMMISSIONER | RFI | Planned | 05/20/2020 | 05/20/2020 | Bid due date has passed | Agricultural Equipment and Supplies |
| UAT Program | Professional Services | 81620P0019 | UAT CSP Evaluation Two | DISEASE CONTROL | Competitive Sealed Proposal | Responses Received | 05/11/2020 | 05/29/2020 | Bid due date has passed | Miscellaneous Professional Services |
| UAT Program | Professional Services | 81620P0018 | UAT CSP Evaluation One | DISEASE CONTROL | Competitive Sealed Proposal | Responses Received | 05/10/2020 | 05/29/2020 | Bid due date has passed | Miscellaneous Professional Services |
| UAT Program | Construction | 85020B0275 | UAT CSB Evaluation One | PUBLIC BUILDINGS | Competitive Sealed Bid | Responses Received | 05/10/2020 | 05/28/2020 | Bid due date has passed | Roadwork/Paving Services |

The **Browse All RFX** screen lists all RFX.

- Utilize the search fields to find your desired opportunity.
- Click the **“Search”** button to see the search results.
- Click the **pencil icon** to open the **View RFX** screen.

6. Viewing RFx Information

Once you have navigated to the **Browse All RFx** screen and accessed an RFx by using the **pencil icon**, key information about the RFx displays in the **View RFx** tab. You may use this information to learn more about the RFx and to help you make an informed decision about whether your organization wishes to respond to this RFx. If you decide to submit a response, this information will provide high-level information to help guide your response.

As a reminder, vendors must have a PASSPort account to begin an RFx response. If you do not currently have a PASSPort account, please go to our PASSPort website at www.nyc.gov/passport to create an account.

PASSPort Profile Tasks RFX Contracts Ordering Catalogs Invoicing Performance Support

< ⌂ ☆ 85020B0259-UAT CSB Award - EG - 01 (000841): Lot 1 / Round 1

Return | Other Actions ▾

View RFX

Acknowledgement

Manage Responses

Discussions with buyer

Setup Team

Participate in RFX

ALERTS ▾

⚠ - There is an upcoming due date for this RFX.

RESPONSE ACTIVITY ▾

1 **SUMMARY** ▾

E-PIN : 85020B0259 04/20/2020 00:00:00

Program : UAT Program

Agency : DEPARTMENT OF DESIGN AND CONSTRUCTION

Division : INFRASTRUCTURE

Agency Contact : Chris DDC01

Agency Contact Email : Chris_DDC01@mailinator.com

RFX Title : 85020B0259-UAT CSB Award - EG - 01

RFX Status : Released

The information below outlines the content that can be found in the **View RFX** tab in PASSPort:

The **View RFX** screen displays Bid Opening Location, associated Documents, and information about competition pools, which are a way an agency can split a solicitation into multiple sections for vendors to provide responses.

1. The **Summary** tile provides key agency and procurement details, including Agency Information and contact, RFX Title and Status.

View RFx

Acknowledgement

Manage Responses

Discussions with buyer

Setup Team

2 KEY DATES

Anticipated Contract Start Date : 02/27/2020


Anticipated contract end date : 03/31/2021

Release Date : 03/06/2020

Due Date : 03/27/2020

Questions due date ⓘ :

3 DOCUMENTS

| Document Name | Document Type | Download |
|---------------|---------------|--|
| adff | Other |  D386908.docx |
| 1 Result(s) | | |

4 NDA

Informations included in this RFP are confidential.

You cannot access this RFP contents until you read and accept the following Non Disclosure Agreement, following these steps:

1) Download document template

• [test](#)

2) Please fill in the blanks, print it, sign it and then scan it.

3) Attach scan document

2. The **Key Dates** tile includes details on Anticipated Contract Start and End Dates, Release Date and Due Date.

3. The **Documents** tile houses supplemental material uploaded by the contracting agency to provide 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. All team members for this RFx will also receive an email notification that an addendum has been issued.

4. If the RFx requires a Nondisclosure Agreement (**NDA**), a tile will appear at the bottom of the screen to complete.

Note: not all RFx require an NDA.

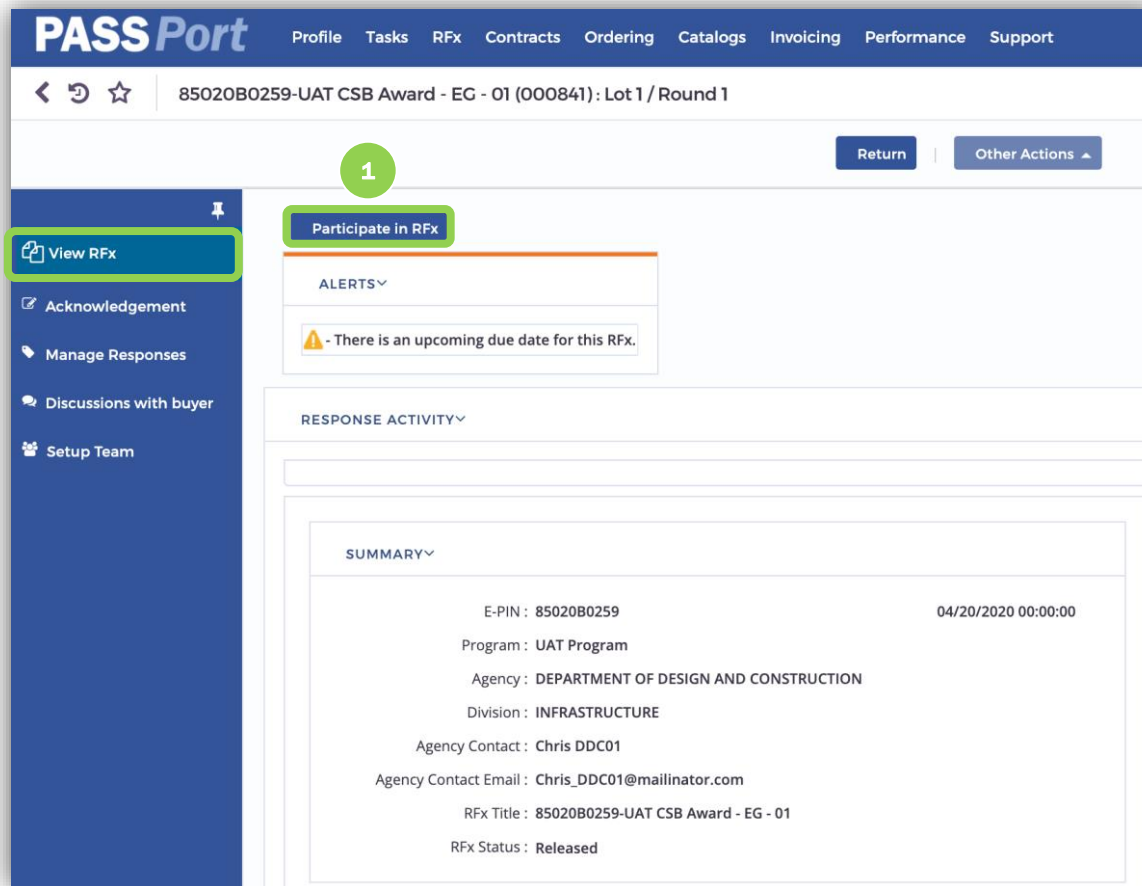
7. Responding to RFx

After you have reviewed the RFx information, determined that the RFx is of interest to your organization, and wish to submit a response, you may proceed by following the steps outlined in this section. While the screenshots show a Competitive Sealed Bid response in PASSPort, the tabs on the left-hand navigation menu and the general process and information requested will remain unchanged for responses to other procurement methods such as a Competitive Sealed Proposal (CSP) and Request for Proposal (RFP).

As a reminder, vendors must have a PASSPort account to begin an RFx response. If you do not currently have a PASSPort account, please go to our PASSPort website at www.nyc.gov/passport to create an account.

7.1 Respond to an RFx

Once you have found an opportunity you wish to respond to, and you are logged into your PASSPort account, navigate to the **View RFx** tab by following the steps outlined in the **Browse RFx** sections of this user manual. As a reminder, you cannot respond to opportunities from the Public Portal.



The following steps outline the process for responding to an RFx.

1. Click the “**Participate in RFx**” button located in the **View RFx** tab.

The screenshot shows the PASSPort web application interface. The top navigation bar includes links for Profile, Tasks, RFx, Contracts, Ordering, Catalogs, Invoicing, Performance, and Support. The main header displays the title "UAT CSB Sourcing Template - Sealed Subcontractor List (000908): Lot 1 / Round 1". A sidebar on the left contains navigation options: View RFx, Acknowledgement, Manage Responses, Discussions with buyer, and Setup Team. The main content area features a "Remaining time" section with a green border and a countdown timer showing "3d 04h 22min 10s". Below this is an "ALERTS" section with a warning icon and the message "There is an upcoming due date for this RFx." To the right of the "Remaining time" section is an "Other Actions" dropdown menu with a green border, containing three options: "Download all contents related to this RFP", "Recover my last offer", and "Duplicate Response". A "Save" button is located above the "Other Actions" menu.

A countdown timer displays the **Remaining time** to respond to an RFx.

Clicking the “**Other Actions**” button will display the following options:

-**Download all contents related to this RFP** allows you to download a copy of the RFx so you can work on the RFx outside of the PASSPort system.

-**Recover my last offer** allows you to retrieve a previous offer if one exists. Users may find it helpful to use information from a previous offer when drafting a new response.

-**Duplicate Response** allows you to clone your response to an RFx for purposes of creating an additional RFx response for subsequent competition pools, or submit information related to an RFx addendum.

7.2 RFx Acknowledgement

Some RFx require **acknowledgement of receipt** and/or **intent to respond** before a response can be started. In these instances, you are required to follow the steps listed below prior to being able to move forward with your response.

The screenshot displays the PASSPort web application interface. The top navigation bar includes the 'PASSPort' logo and a series of menu items: Profile, Tasks, RFx, Contracts, Ordering, Catalogs, Invoicing, Performance, Admin, Config, Settings, and Support. The user is logged in as 'Vendoradmin F.' with a '(Comp)' status. The breadcrumb trail shows the path: 01020M0017-RM+NA_Soli (001761) : Lot 1 / Round 1. The left sidebar contains a 'View RFx' icon and a list of options: Acknowledgement (highlighted with a green box), Manage Responses, Discussions with buyer, and Setup Team. The main content area shows the 'Acknowledgement' tab for the selected RFx. It displays a 'Remaining time' of 55d 10h 10min 14s. Below this is an 'ALERTS' section with a warning icon and the message: 'There is an upcoming due date for this RFx.' The 'RESPONSE ACTIVITY' section shows a list of activities. The first activity is labeled 'ACKNOWLEDGEMENT' and contains the text: 'To answer to this RFP, please acknowledge receipt:'. Below this text is a button labeled 'I acknowledge receipt of this RFP', which is highlighted with a green box. A green circle with the number '2' is placed next to this button, indicating the step to be followed.

If an RFx requires **acknowledgement of receipt** of the RFx and/or **intent to respond**, an Acknowledgement section will display in the **Acknowledgement** tab.
Note: Not all RFx require Acknowledgements.

2. Click the “I acknowledge receipt of this RFx” button.

RESPONSE ACTIVITY▼

RECEIPT ACKNOWLEDGED ON 03/05/2020 12:53:27 (YOUR LOCAL TIME)

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

3 ☒ WILL RESPOND: our intent is to respond to this RFx

4 ☐ WILL NOT RESPOND: our intent is not to respond to this RFx

Valid

3. Click the checkbox to the left of “**WILL RESPOND: our intent is to respond to this RFx.**”

If your organization does *not* intend to respond to the RFI, select “**WILL NOT RESPOND: our intent is not to respond to this RFI**” instead. Selecting this option will prompt a **Reason** box to appear. Please add a brief explanation of the reason for not responding. Then click “**Valid.**”

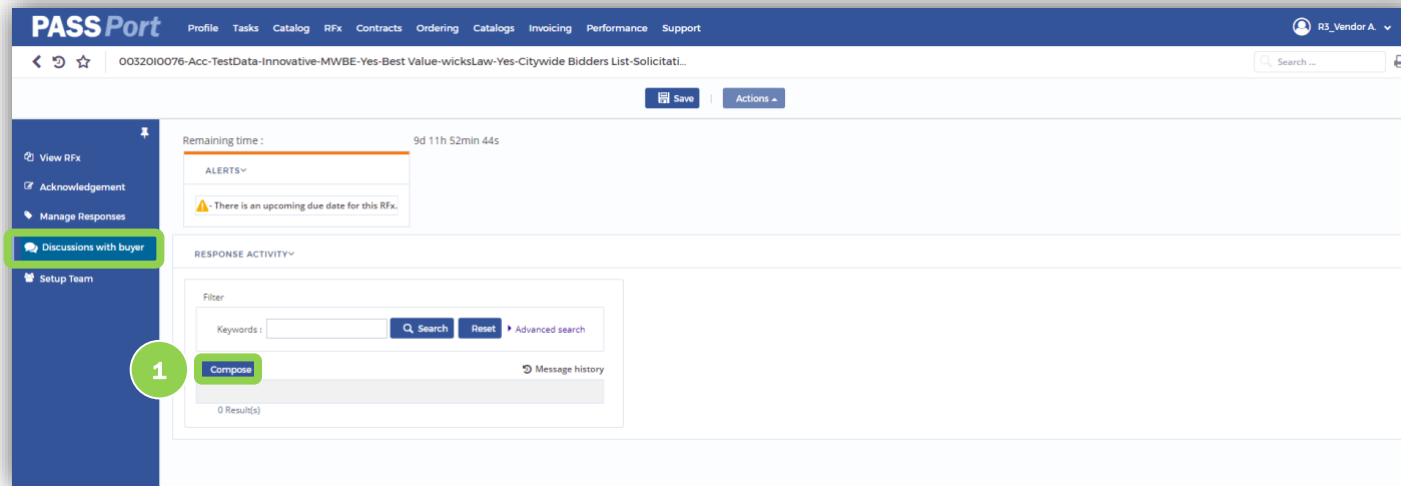
4. Click the “**Valid**” button.

After your acknowledgement is completed, a draft response is automatically created by the system for you to begin working on.

Before the steps of creating your response are covered, this guide will provide an overview of the **Discussion with buyer** (agency) and **Setup Team** tabs which will assist you in completing your response.

7.3 Discussion with Buyer (Agency)

If you have a question about the RFX, you can initiate a conversation with the contracting agency using the **Discussion with buyer** (agency) forum. This feature will consolidate communication in PASSPort and save time from having conversations outside of the system (i.e., via email).



The **Discussion with buyer** tab is a forum to communicate directly in PASSPort with the RFX contracting agency *after* you have decided to respond to the RFX (i.e. clicked “**Participate in RFX**” button).

PASSPort maintains and can display a record of all interactions between you and the agency.

1. To draft a message, click the “**Compose**” button.

The screenshot shows a web interface for 'Discussions with buyer'. On the left is a dark blue sidebar with 'Discussions with buyer' and 'Setup Team' links. The main area is titled 'RESPONSE ACTIVITY' and contains a search filter section with a 'Keywords' input, 'Search', and 'Reset' buttons. Below this is a 'Compose' button and a 'Message history' link. The '0 Result(s)' message is displayed. To the right is the 'Compose' form, which includes:

- 2**: A dropdown menu for 'Type' with 'Clarification' selected.
- 3**: A text field for 'Subject'.
- 4**: A dropdown menu for 'To'.
- 5**: A large text area for the message body.
- 6**: A 'Send' button (green) and a 'Cancel' button (red).

Below the text area is a gray button labeled 'Click or Drag to add file'.

2. Indicate the **Type** of message you would like to send by selecting a category from the drop-down.
3. Add a **Subject** line.
4. Indicate the agency contact **To** whom you are sending this message by selecting from the drop-down menu.
5. Compose your message in the textbox.
6. Click the **“Send”** button to submit your message.

Note: You can attach files to your correspondence by clicking the “Click or Drag to add files” gray button.

7.4 Setup Team

In June 2020, PASSPort was expanded to enable end-to-end digital procurement, allowing vendors to find and respond to RFx opportunities and develop, sign and manage contracts. With this expansion, **vendor system user roles** have been created to support new system functionalities. The following roles are available in PASSPort and can now participate in the digital RFx response process: **Procurement Level 1 and Level 2, Financials Level 1 and Level 2** and **Contract Signatory**. These roles have been added to Vendor Profiles in the **Contacts** tab drop-down list. A user may be assigned **multiple roles**.

Assigning contacts a specific user role allows vendors to customize who can work on an RFx response: **Vendor Admin, Procurement Level 1 & Procurement Level 2** profiles have global system access, which means they can access and work on all RFx responses across the organization. From the **Setup Team** tab, Vendor Admin, Procurement Level 1 and Procurement Level 2 roles may **add additional PASSPort users** to the vendor response team. The vendor response team members can only work on the RFx response for which they are added. This allows vendors to create customized teams on a case-by-case basis to work on specific RFx responses.

| Role | Description/ Task Authorizations |
|---------------------------|---|
| Vendor Admin | <ul style="list-style-type: none">• Can manage contacts in the Vendor Profile• Receive direct invite to participate in RFx• Can add users to the vendor response team• Can create a response |
| Vendor Procurement L1 | <ul style="list-style-type: none">• Receive direct invite to participate in RFx response• Can add users to the vendor response team• Can create a response |
| Vendor Procurement L2 | |
| Vendor Financials L1 | <ul style="list-style-type: none">• Can create/edit a response when added to the team in the Setup Team Tab |
| Vendor Financials L2 | |
| Contributor | |
| Vendor Contract Signatory | <ul style="list-style-type: none">• Can create/edit a response when added to the team <i>(Can sign the authored contract agreement at the Contract stage)</i> |

The full list of roles can be seen in the “Role” drop-down menu on the Contacts tab. MOCS recommends assigning at least

two contacts the Vendor Admin role in order to avoid account access issues. Note: a single user can be assigned multiple roles. Please refer to the [Adding a Contact to your PASSPort Account](#) video tutorial on how to add multiple roles.

For more information on authorizations by procurement action and authorizations by vendor user role, please refer to the **Vendor User Roles** Job Aid.

The **Setup Team** tab is where you can designate additional staff from your organization to work on the response.

1. To select an existing PASSPort contact, select their name from the **Choose a contact** drop-down.

View RFx

Acknowledgement

Manage Responses

Discussions with buyer

Setup Team

ALERTS

- There is an upcoming due date for this RFx.

RESPONSE ACTIVITY

Unable to answer some questions of this RFP?
Get help from your colleagues!

Invite your colleagues and give them access to this RFP.
You can choose from the contacts already identified on this portal, or easily create a new contact to invite a colleague.

(NB: All selected contacts can modify and submit your answer. They will only have access to this RFP.)

1

Choose a contact :

or

Create a new contact

 (may require a validation from our buyers for the account to be created)

| Name | Email |
|-----------------|---------------------|
| ADMIN r3_Vendor | r3_vendor@gmail.com |

1 Result(s)

View RFx

Acknowledgement

Manage Responses

Discussions with buyer

Setup Team

ALERTS

- There is an upcoming due date for this RFx.

RESPONSE ACTIVITY

2

Create a new contact

Choose a contact :

(may require a validation from our buyers for the account to be created)

| Name | Email |
|-----------------|---------------------|
| ADMIN r3_Vendor | r3_vendor@gmail.com |

1 Result(s)

- To add an individual from your organization to respond to the RFx, click the **“Create a new contact”** button.

Note: only users with the following roles can add new contacts:

- Vendor Admin
- Vendor Procurement Level 1
- Vendor Procurement Level 2

Contact Management

6 **Save** Save and Close Close

CONTACT INFORMATION

Genders :

3 First Name :

4 Last Name :

5 Email :

Phone Number :

Cell :

Title :

List of languages : **English**

Photo : Click or Drag to add a picture

LL34 Contact : ☐

Login :

BUSINESS ADDRESS

Address Line 1 : **50 EAST 19th STREET**

Address Line 2 : **# E-1**

City : **BROOKLYN**

State : **New York**

Country : **UNITED STATES**

Zip Code : **11226**

When creating a new contact, the **Contact Management** window will appear. Here you will enter the relevant information for the contact. Complete the required fields. Required fields have a red marker.

3. Add the contact **First Name**.
4. Add the contact **Last Name**.
5. Add the contact **Email** address.
6. Click the **“Save”** button.

Note: the new contact’s business address will auto-populate the form with your company’s current business address. You can edit this default address by clicking into the corresponding boxes.

7.5 Manage Responses

The **Manage Responses** tab is where you will see all your RFx responses. Your initial response will appear here after deciding to participate in an RFx. This section of the guide will provide step-by-step guidance for accessing, completing, submitting your response.

PASSPort Profile Tasks RFx Contracts Ordering Catalogs Invoicing Performance Support

85020B0273 - Reconstruction of Sidewalks in Bronx and Manhattan (000882): Lot 1 / Round 2

Save | Other Actions

Remaining time : 3d 04h 34min 49s

ALERTS

There is an upcoming due date for this RFx.

RESPONSE ACTIVITY

Status: Search Reset

Competition Pool:

| RFx Name | Response Name | Competition Pool | Responsiveness Status | Submission Status | Response Progress | Questions Answered | Submitted on (Your Local Time) |
|---|---------------|--|-----------------------|-------------------|-------------------|--------------------|--------------------------------|
| 85020B0273 - Reconstruction of Sidewalks in Bronx and Manhattan | Proposal # 2 | | | In progress | 0% | 0% | |
| 85020B0273 - Reconstruction of Sidewalks in Bronx and Manhattan | Proposal # 1 | Reconstruction of Sidewalks in Bronx and Manhattan | | Submitted | 100% | 100% | 05/08/2020 11:50:36 |

The **Manage Responses** tab is a repository of all of your current and past responses to RFx.

1. Click the **pencil icon** to open and view more detail about a response. This will open a new screen, **Your Proposal Info**.

You may also search by **Status** or **Competition Pool**. 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.

November Vendor's proposal

3

Save Save and Close Cancel this response Close Check Progress Duplicate Response

Your Proposal Info

Questionnaire

Subcontractors and Joint Ventures

Item

LL34 Compliance

M/WBE Requirements

Response Label : Proposal # 1

Description :

2 Competition Pool : Management Consulting Services

Responsiveness Status :

INFORMATION

Created by LORI LN LoriFN on 05/08/2020 11:05:32
Modified by LORI LN LoriFN on 05/24/2020 23:25:46

Response ID :

The action buttons at the top of the page allow you to **Save** progress, **Cancel this Response** (if necessary), **Check Progress** to view a list of remaining steps and **Duplicate Response**, if desired.

2. To proceed with your response, either type in the competition pool or click on the ellipsis to search for the competition pool you wish to submit a response for.

3. Click the **"Save"** button.

Note: You may submit additional responses after your first response is complete. A **"Create New Response"** button will be available for you to initiate the new proposal. A procurement with multiple competition pools for which you would like to submit responses to more than one pool is an example of where this functionality is useful.

7.6 Questionnaire

The **Questionnaire** tab is where you answer the questions configured by the agency for evaluation in connection with the RFx.

5114's proposal

Save Save and Close Cancel this response Close Check Progress Duplicate Response

Your Proposal Info
Questionnaire
Subcontractors and Joint Ventures
Item
LL34 Compliance
M/WBE Requirements

Campaign : 81620P0011-UAT CSP GD II
Supplier : 5114
Respondent : Contributor Cont

Agency : DEPARTMENT OF HEALTH AND MENTAL HYGIENE
Commodity : 353 - Miscellaneous Professional Services

Provider Experience 0%

Required Documents 0%

Affirmations 0%

Provider Experience

Experience Providing to Management Consulting Services
In approximately 500 words or less, describe your organization's successful relevant experience providing management consulting services within government. Please include the number of years of such experience.
Answer

Experience Collaborating with Government Agency Staff
In approximately 500 words or less, please describe your organization's experience collaborating effectively with other government agency staff. Please include the number of years of such experience.
Answer

The **Questionnaire** tab displays questions that the agency wants you to respond to as part of the RFx.

The questions are written by the agency and will be used to evaluate your response during the Evaluation and Award phase.

Depending on the procurement method and the agency's questions, there may be more than one **Questionnaire** tab, and questions may be scored or used for informational and/or responsiveness purposes.

Save Save and Close Cancel this response Close Check Progress Duplicate Response

Your Proposal Info

Questionnaire

Subcontractors and Joint Ventures

Item

LL34 Compliance

M/WBE Requirements

Campaign : 81620P0011-UAT CSP GD II
Supplier : 5114
Respondent : Contributor Cont

Provider Experience

Provider Experience 0%

Required Documents 0%

Affirmations 0%

Experience Providing to Management Consulting Services
In approximately 500 words or less, describe your organization's succesful relevant experience provi
Answer

Experience Collaborating with Government Agency Staff
In approximately 500 words or less, please describe your organization's experience collaborating eff
Answer

A questionnaire may include one or more sections. The questionnaire will default to the first section, **Provider Experience**. You may navigate between sections at any time.

A progress bar will display the percentage of questions completed for your reference.

5114's proposal

Save Save and Close Cancel this response Close Check Progress Duplicate Response

Your Proposal Info

Questionnaire

Subcontractors and Joint Ventures

Item

LL34 Compliance

M/WBE Requirements

Campaign : 81620P0011-UAT CSP GD II
Supplier : 5114
Respondent : Contributor Cont

Agency : DEPARTMENT OF HEALTH AND MENTAL HYGIENE
Commodity : 353 - Miscellaneous Professional Services

Provider Experience

Provider Experience 50%

Required Documents 0%

Affirmations 0%

Experience Providing to Management Consulting Services
In approximately 500 words or less, describe your organization's succesful relevant experience providing management consulting services within government. Please include the number of years of such experience.
Our organization has extensive experience...

Experience Collaborating with Government Agency Staff
In approximately 500 words or less, please describe your organization's experience collaborating effectively with other government agency staff. Please include the number of years of such experience.
Answer

4a

4(a) The **Questionnaire** tab offers a wide range of customization for agencies to create questions.

In this example, the agency provides free text boxes for you to submit your provider experience response. Also note the progress bar update as responses are saved. This section has been completed at 50%.

5114's proposal

Save Save and Close Cancel this response Close Check Progress

Your Proposal Info

Questionnaire

Subcontractors and Joint Ventures

Item

LL34 Compliance

M/WBE Requirements

Campaign : 81620P0011-UAT CSP GD II

Supplier : 5114

Respondent : Contributor Cont

Agency : DEPARTMENT OF HEALTH AND MENTAL HYGIENE

Commodity : 4b - Miscellaneous Professional Services

Provider Experience 100%

Required Documents 50%

Affirmations 0%

Required Documents

Staffing Plan

Please upload your proposed staffing plan.

Click or Drag to add a file

Staffing Plan.docx

Key Staff Resumes

Please upload the resumes and/or Description of Qualifications for Project Team.

Click or Drag to add files

4(b) Agencies may also structure questions in the form of requests for required documents.

In this example, providing an attachment will successfully complete the response. The progress bar will update after each document is uploaded.

Note that the Provider Experience section progress bar now displays in green, indicating that section has been completed.

5114's proposal



Save

Save and Close

Cancel this response

Close

Check Progress

Your Proposal Info

Questionnaire

Subcontractors and Joint Ventures

Item

LL34 Compliance

M/WBE Requirements

Required Documents

0%

Affirmations

0%

Iran Divestment

The Iran Divestment Act of 2012, effective as of April 12, 2012, is codified at State Finance Law ("SFL") §165-a and General Municipal Law ("GML") §103-g. The Iran Divestment Act, with certain exceptions, prohibits municipalities, including the City, from entering into contracts with persons engaged in investment activities in the energy sector of Iran. Pursuant to the terms set forth in SFL §165-a and GML §103-g, a person engages in investment activities in the energy sector of Iran if:

(a) the person provides goods or services of twenty million dollars or more in the energy sector of Iran, including a person that provides oil or liquefied natural gas tankers, or products used to construct or maintain pipelines used to transport oil or liquefied natural gas, for the energy sector of Iran; or

(b) The person is a financial institution that extends twenty million dollars or more in credit to another person, for forty-five days or more, if that person will use the credit to provide goods or services in the energy sector in Iran and is identified on a list created pursuant to paragraph (b) of subdivision three of Section 165-a of the State Finance Law and maintained by the Commissioner of the Office of General Services.

A bid or proposal shall not be considered for award nor shall any award be made where the bidder or proposer fails to submit a signed and verified bidder's certification.

Each bidder or proposer must certify that it is not on the list of entities engaged in investment activities in Iran created pursuant to paragraph (b) of subdivision 3 of Section 165-a of the State Finance Law. In any case where the bidder or proposer cannot certify that they are not on such list, the bidder or proposer shall so state and shall furnish with the bid or proposal a signed statement which sets forth in detail the reasons why such statement cannot be made. The City of New York may award a bid to a bidder who cannot make the certification on a case by case basis if:

(1) The investment activities in Iran were made before the effective date of this section (i.e., April 12, 2012), the investment activities in Iran have not been expanded or renewed after the effective date of this section and the person has adopted, publicized and is implementing a formal plan to cease the investment activities in Iran and to refrain from engaging in any new investments in Iran; or

(2) The City makes a determination that the goods or services are necessary for the City to perform its functions and that, absent such an exemption, the City would be unable to obtain the goods or services for which the contract is offered. Such determination shall be made in writing and shall be a public document.

Pursuant to General Municipal Law §103-g, which generally prohibits the City from entering into contracts with persons engaged in investment activities in the energy sector of Iran, the bidder/proposer submits the following certification:



Click or Drag to add a file

4c



Yes-I affirm

No-I do not affirm

4(c) Agencies may also request affirmations within the **Questionnaire** tab. The progress bar will update after each affirmation is completed and saved.

November Vendor's proposal

Save Save and Close Cancel this response Close Check Progress Duplicate Response

Your Proposal Info

Questionnaire

Subcontractors and Joint Ventures

Item

LL34 Compliance

M/WBE Requirements

Agency : DEPARTMENT OF HEALTH AND MENTAL HYGIENE
Commodity : 353 - Miscellaneous Professional Services

experience providing management consulting services within government. Please include the number of years of such experience.

collaborating effectively with other government agency staff. Please include the number of years of such experience.

CREATION BY IMPORT

Download in Excel 2007-2010 format (xlsx)

Download in Excel 97-2003 format (xls)

Drop here your answer (in Excel format)

Upload (in Excel Format)

PASSPort enables you to download an Excel workbook to complete outside of the system or to share with a team member without a PASSPort account.

After the questions are answered, upload the form (in Excel format). Your answers will automatically populate in PASSPort.

7.7 Subcontractors and Joint Ventures

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

5114's proposal

Save Save and Close Cancel this response Close Check Progress Duplicate Response

Your Proposal Info
Questionnaire
Subcontractors and Joint Ventures
Item
LL34 Compliance
M/WBE Requirements

Sealed Subcontractor List Subcontractors and Joint Ventures

SEALED SUBCONTRACTOR LIST▼

1 Click or Drag to add a file

The **Subcontractors and Joint Ventures** tab is available to capture this information for your response, if required.

1. If Wick's Law is applicable, you can upload the **Sealed Subcontractor List** by uploading the file directly by clicking "Click or Drag to add a file." Upload the file.

Save Save and Close Cancel this response Validate & Submit Close Duplicate Response

Your Proposal Info
Questionnaire
Subcontractors and Joint Ventures
Item
LL34 Compliance
M/WBE Requirements

Sealed Subcontractor List Subcontractors and Joint Ventures

SUBCONTRACTOR INFORMATION▼

2 Add Subcontractor

0 Result(s)

JOINT VENTURE▼

Add Joint Venture

0 Result(s)

If Wick's Law is not applicable, click the **Subcontractors and Joint Ventures** subtab.

2. Click the **"Add Subcontractor"** button to add any subcontractor information not already in PASSPort.

Add Subcontract

5

Save | Close

Proposal ID : Proposal # 1

3

SUBCONTRACT INFORMATION

Subcontract Amount : 20,000.0

Purpose : Sample

Start Date : 06/02/2020

End Date : 05/14/2021

M/WBE Certification : Women Owned

Contract Participation : 10.00

4

VENDOR INFORMATION

Vendor Not yet identified : ☐

Select PASSPort Vendor : #1 LANDSCAPING C...

EIN : 487721381

Vendor Name : #1 LANDSCAPING CORP

Upon clicking the “**Add Subcontractor**” button, an **Add Subcontract** window will appear.

3. In the **Add Subcontract** window, complete the required fields. Required fields have a red marker.

4. If the Subcontractor exists in PASSPort, you may search for them in the **Vendor Information** section. PASSPort will automatically populate their **EIN**, **M/WBE Certification**, **Vendor Name** and **Contract Participation** fields. If a vendor does not have an account, they may obtain guidance on create an account by accessing the [Vendor Account Creation Job Aid](#).

If you have not identified your subcontractor yet, you may select the checkbox by the field **Vendor Not yet identified**. You will make an M/WBE selection based on the anticipated M/WBE certification of the subcontractor. If selected, you will be able to inform the agency the subcontractor information when the group is identified.

5. Click the “**Save**” and then “**Close.**”

Save

Save and Close

Cancel this response

Validate & Submit

Close

Duplicate Response

Your Proposal Info

Questionnaire

Subcontractors and Joint Ventures

Item

LL34 Compliance

M/WBE Requirements

Sealed Subcontractor List

Subcontractors and Joint Ventures

SUBCONTRACTOR INFORMATION

Add Subcontractor

0 Result(s)

JOINT VENTURE

Add Joint Venture

0 Result(s)

6. If applicable, click the “Add Joint Venture” button.

NYC
Mayor's Office of
Contract Services

43

Joint Venture

Save Save and Close Close

ADD VENDOR

Proposal ID : Proposal # 1

Select PASSport vendor : ... 7

Ownership % :

M/WBE Certification : 0 Result(s)

Status : Valid

Total :

Upon clicking the “Add Joint Venture” button, a Joint Venture window will appear.

7. Click on the **ellipsis** to identify the PASSPort vendor.

Supplier (Related entities selection) ✕

Close

Keywords : Q Search Reset

Please select from the options below: ⓘ

| | |
|-------------------------------------|---------------------------------------|
| <input type="checkbox"/> | |
| <input type="checkbox"/> | |
| <input type="checkbox"/> | "D" YARD INTERNATIONAL, INC |
| <input checked="" type="checkbox"/> | "EUCALYPTUS" FLOWER SHOP "EUCALYPTUS" |
| <input type="checkbox"/> | "K" LINE AMERICA, INC. |
| <input type="checkbox"/> | "SOS" FOUNDATION INC |
| <input type="checkbox"/> | "WEE CARE" CHILD CARE NETWORK |
| <input type="checkbox"/> | #1 AUTO GLASS INC |
| <input type="checkbox"/> | #1 Brooklyn Furniture INC |
| <input type="checkbox"/> | #1 LANDSCAPING CORP |
| <input type="checkbox"/> | #1 LANDSCAPING CORP |
| <input type="checkbox"/> | #1 LANDSCAPING CORP |
| <input type="checkbox"/> | #1 LANDSCAPING CORP |
| <input type="checkbox"/> | #1 LANDSCAPING CORP |
| <input type="checkbox"/> | #Wegivebecausewecare #365Days, Inc. |




<< < 1 2 3 4 5 6 7 > >>


More than 150 Result(s)

- Upon clicking the ellipsis, a new window will appear for you to identify the joint venture. Enter in a keyword to search for a specific vendor, then click the **"Search"** button.

Note: the search results list is in alphabetical order. You can also manually search by using the numbers or arrows at the bottom of the list to navigate.

- Click the checkbox to select the vendor related to your joint venture.

Joint Venture   

10  Save Save and Close Close

ADD VENDOR▼

Proposal ID : Proposal # 1

Select PASSport vendor : "EUCALYPTUS" F ...

Ownership % :

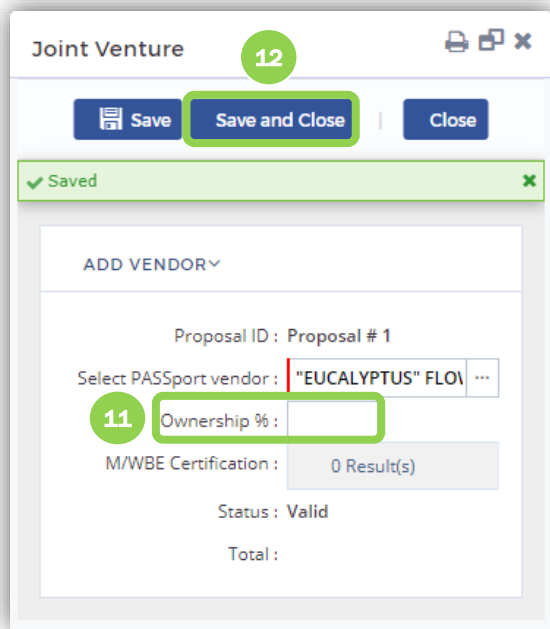
M/WBE Certification : 0 Result(s)

Status : Valid

Total :

10. Click the **“Save”** button to save your selection.

Upon saving, the **Ownership %** field will become available to edit.



The screenshot shows a web application window titled "Joint Venture". At the top, there are three buttons: "Save", "Save and Close" (highlighted with a green box and a green circle labeled "12"), and "Close". Below the buttons is a green status bar that says "✓ Saved". The main content area is titled "ADD VENDOR" and contains the following information:

- Proposal ID : Proposal # 1
- Select PASSport vendor : "EUCALYPTUS" FLOV ...
- 11 Ownership % : (highlighted with a green box and a green circle labeled "11")
- M/WBE Certification : 0 Result(s)
- Status : Valid
- Total :

11. Enter in the **Ownership percentage** for this vendor's role in the joint venture.

12. Click the **"Save and Close"** button.

Note: Repeat Steps 7 through 11 for each vendor that is part of the joint venture.

7.8 Item

The **Item** tab is where the agency identifies the required items for the contract.

5114's proposal

2

Save Save and Close Cancel this response Close Check Progress Duplicate Response

Download in Excel 2007-2010 format (xlsx) Drop here your quotation form (in Excel format)
Download in Excel 97-2003 format (xls) Upload your questionnaire (in Excel Format)

Currency: Total: Total per currency

Proposal Amount: 0.00

Filter

Keywords: Not answered items: Search

Answer grid

1

| | Items code | Item types | Label | Order | Qty | Unit | Unit price | Amount |
|--|-----------------|---------------|----------------|-------|-----|------|------------|--------|
| | ITEM_CODE_001_1 | Required Item | Item 1 | 1 | 1 | yr. | | |
| | I1_2 | Required Item | Item label-986 | 1 | | | | |

2 Result(s)

The **Item** tab may be completed directly in the system or you may download, complete, and upload a quotation form (in Excel format) for PASSPort to automatically populate the responses you provided.

1. Enter the **Unit Price** per listed Required Item.
2. Click the **“Save”** button.

5114's proposal

3

Save

Save and Close

Cancel this response

Validate & Submit

Close

Duplicate Response

Your Proposal Info

Questionnaire

Subcontractors and Joint Ventures

Item

LL34 Compliance

M/WBE Requirements

QUESTIONNAIRE CREATION BY IMPORT

Download in Excel 2007-2010 format (xlsx)

Drop here your quotation form (in Excel format)

Download in Excel 97-2003 format (xls)

Upload your questionnaire (in Excel Format)

Currency :

Total :

Total per currency

270.00

Proposal Amount : 270.00

Filter

Keywords :

Not answered items : ☐

Search

Answer grid

| | Items code | Item types | Label | Order | Qty | Unit | Unit price | Amount |
|--|-----------------|---------------|----------------|-------|-----|-------|------------|--------|
| | ITEM_CODE_001_1 | Required Item | Item 1 | 1 | | 1 yr. | 120.00 | 120.00 |
| | I1_2 | Required Item | Item label-986 | 1 | | | 150.00 | 150.00 |

2 Result(s)

Note: clicking the “Save” button will update the total price in the **Total per currency** box. See screenshot.

3. Upon saving your prices, a green “Validate & Submit” button will appear. Click this button to submit your response.

7.9 LL34 Compliance

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.

Save Save and Close Cancel this response Close Check Progress Duplicate Response

Your Proposal Info
Questionnaire
Subcontractors and Joint Ventures
Item
LL34 Compliance
M/WBE Requirements

PRINCIPAL OFFICERS

Excluded Officers : CEO CFO COO

Add Existing Contact : 1

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

Individual Owners:

Add Existing Contact :

Add an Organization

Organization Owners

0 Result(s)

SENIOR MANAGERS

Add Existing Contact :

The **LL34 Compliance** tab effectively replaces the Doing Business Data Form; this subtab lists **Principal Officers** and **Principal Owners**.

Within the **Principal Officers** tile, you can exclude officers by selecting the checkbox next to the positions listed.

1. To add a contact and assign them a role, click the **ellipsis** to under **Add Existing Contact**.

ADD CONTACT

Keywords :

| <input type="checkbox"/> | First Name | Last Name | Position | Date of Birth | Address Line 1 | City | State | Zip Code | Employer (if not employed by entity) |
|-------------------------------------|------------|------------|---|---------------|----------------|------|----------|----------|--------------------------------------|
| <input checked="" type="checkbox"/> | Vendor | Test Admin | <ul style="list-style-type: none"> CEO COO Principal Owner | 03/02/2020 | test | test | New York | 12345 | SHAN CHEN |

1 Result(s)

Within the **Add Contact** popup, PASSPort users will be listed, along with the Position(s) they have in the system. If a new user needs to be added in PASSPort, refer to the Adding and Assigning Roles to Vendor Contacts Job Aid by following this link: [Learning to Use PASSPort webpage](#).

2. Select the relevant contact by clicking the **checkbox**.

3. Click the **“Close”** button.

Save

Save and Close

Cancel this response

Close

Check Progress

Duplicate Response

Your Proposal Info

Questionnaire

Subcontractors and Joint Ventures

Item

LL34 Compliance

M/WBE Requirements

PRINCIPAL OFFICERS

Excluded Officers :

CEO

CFO

COO

Add Existing Contact

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

Individual Owners:

Add Existing Contact

1

Add an Organization

Organization Owners

0 Result(s)

SENIOR MANAGERS

Add Existing Contact

You also can add a Principal Owner or indicate a reason there is no listed owner by clicking the checkbox by the most applicable reason from the options listed.

1. To add a contact and assign a role, click on the ellipsis to open a menu of available contacts.

NYC

Mayor's Office of Contract Services

52

ADD CONTACT

3 Close

Keywords : Search Reset

| <input type="checkbox"/> | First Name | Last Name | Position | Date of Birth | Address Line 1 | City | State | Zip Code | Employer (if not employed by entity) |
|----------------------------|------------|------------|---|---------------|----------------|------|----------|----------|--------------------------------------|
| 2 <input type="checkbox"/> | Vendor | Test Admin | <ul style="list-style-type: none"> CEO COO Principal Owner | 03/02/2020 | test | test | New York | 12345 | SHAN CHEN |

1 Result(s)

The **Add Contact** window will appear. Within the **Add Contact** window, PASSPort users will be listed, along with the Position(s) they have in system.

2. Select the relevant contact by clicking the **checkbox**.

3. Click the **“Close”** button.

Save

Save and Close

Cancel this response

Close

Check Progress

Duplicate Response

Your Proposal Info

Questionnaire

Subcontractors and Joint Ventures

Item

LL34 Compliance

M/WBE Requirements

PRINCIPAL OFFICERS

Excluded Officers :

CEO

CFO

COO

Add Existing Contact

...

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

Individual Owners:

Add Existing Contact

...

Add an Organization

Organization Owners

0 Result(s)

SENIOR MANAGERS

Add Existing Contact

1

To identify an individual as a Senior Manager, click on the ellipsis in **Add Existing Contact**.

Note: To be able to submit a response, at least one Senior Manager must be identified.

NYC
 Mayor's Office of
 Contract Services

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ADD CONTACT

3

Close

Keywords :

Search

Reset

| <input type="checkbox"/> | First Name | Last Name | Position | Date of Birth | Address Line 1 | State | Zip Code | City | Employer |
|-------------------------------------|------------|------------|----------------|---------------|----------------|----------|----------|-----------------|------------|
| <input checked="" type="checkbox"/> | Vendor | FinancialL | Senior Manager | 11/21/2019 | abcd | New York | 133001 | Brooklyn street | iFace Mall |

1 Result(s)

The **Add Contact** window will appear. Select the appropriate contact. You can search by keyword or scroll through the list in the **Add Contact** window. If the individual is not currently in PASSPort, you may add them as a contact first.

2. Select the relevant contact by clicking the **checkbox**.

3. Click the **“Close”** button.

7.10 M/WBE Compliance

This **M/WBE Requirements** tab is available for all procurements with an M/WBE goal and ensures compliance with M/WBE requirements. This tab displays the goals set for a particular procurement and allows you to see if you are meeting these goals based on your response. The M/WBE participation status will update to meeting M/WBE participation requirements when you have met or exceeded the goal. Once your M/WBE status is confirmed, you will be able to submit your response.

November Vendor's proposal

SaveSave and CloseCancel this responseCloseCheck ProgressDuplicate Response

Your Proposal Info

Questionnaire

Subcontractors and Joint Ventures

Item

M/WBE Requirements

M/WBE REQUIREMENTS

| Group | Percentage |
|---------------------------|------------|
| Black American | |
| Hispanic American | |
| Asian American | |
| Native American | |
| Women | |
| Unspecified | 20.00 |
| Total Participation Goals | 20.00 |

Total Amount : 0.00

Current Total : 0.00

YOUR M/WBE PARTICIPATION STATUS

X

You are not meeting the M/WBE participation requirements

Learn more about the NYC minority and women-owned business enterprise (M/WBE) certification program on the NYC business website.

YOUR M/WBE SUBCONTRACTS

0 Result(s)

The **M/WBE Requirements** tile displays the goal set for this procurement.

The **Total Amount** and **Current Total** fields updates based on information entered in the **Item** and **Subcontractors and Joint Ventures** tabs. If the prime contractor is an M/WBE vendor, the total will automatically update.

The **Your M/WBE Participation Status** tile provides the current status if your proposal is meeting the procurement's goal.

The **Your M/WBE Subcontracts** tile provides a summary of subcontract details.

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

M/WBE REQUIREMENTS

| Group | Percentage |
|---------------------------|------------|
| Black American | |
| Hispanic American | |
| Asian American | |
| Native American | |
| Women | |
| Unspecified | 20.00 |
| Total Participation Goals | 20.00 |

Total Amount : 30,000.00
Current Total : 24.26

YOUR M/WBE SUBCONTRACTS

| M/WBE Certification Type | Subcontract Amount | Contract Participation | Purpose | Anticipated Start Date | Anticipated End Date |
|--------------------------|--------------------|------------------------|---------|------------------------|----------------------|
| Women Owned | 30,000.00 | 24.26 | Purpose | 07/01/2020 | 07/31/2020 |
| | 30,000.00 | 24.26 | | | |

1 Result(s)

YOUR M/WBE PARTICIPATION STATUS

You are meeting the M/WBE participation requirements
Learn more about the NYC minority and women-owned business enterprise (M/WBE) certification process

Displayed is an example of a proposal that is meeting M/WBE participation requirements. Note the green check and status in the **Your M/WBE Participation Status** tile.

The **Total Amount** and **Current Total** fields have been updated based on information provided in the Item and Subcontractor sections.

The **Your M/WBE Subcontracts** table displays key details for the subcontractor.

You will now be able to submit your RFx response (provided all other sections have been completed.)

7.11 Submitting your Response

After you have filled out all the information in the tabs outlined in the previous sections, you are now ready to submit your response. This section provides step-by-step guidance for submitting your response.

The screenshot shows a web interface for submitting a proposal. The title is "November Vendor's proposal". A green circle with the number "1" is positioned above the "Validate & Submit" button. The interface includes a sidebar with navigation links: "Your Proposal Info", "Questionnaire", "Subcontractors and Joint Ventures", "Item", "LL34 Compliance", and "M/WBE Requirements". The main content area contains the following fields and controls:

- Response Label :** Proposal # 1
- Description :** (Empty text area)
- Competition Pool :** Road Reconstruction Pool 1
- Sealed Subcontractor list opened? :** ☐
- Responsiveness Status :**
- INFORMATION** (with a dropdown arrow)
- Created by** LORI LN LoriFN on 05/24/2020 22:38:52
- Modified by** LORI LN LoriFN on 05/25/2020 01:00:24

At the top of the main content area, there are several buttons: "Save", "Save and Close", "Cancel this response", "Validate & Submit" (highlighted with a green circle and the number 1), "Close", and "Duplicate Response".

1. Once your response is complete, and all required information has been submitted, the **"Validate & Submit"** button will appear. Click the button to proceed.

Do you really want to submit your proposal? ✕

- 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.

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

3 Submit my proposal Cancel

- Carefully read the disclosure. Click the checkbox to provide sign-off on the accuracy of the response.
- Click the **“Submit my proposal”** button. A dialog box will appear asking you to confirm the submission. Scroll to read the disclosure and click the checkbox.

Note: After you have submitted your response, you will not be able to retract or modify your response. Please be sure to review your work carefully before submitting!

November Vendor's proposal 🖨️ 📄 ✕

Close Withdrawal Duplicate Response

3 Bid Submitted on 05/25/2020 01:12:40
 RFP 85020B0259-UAT CSB Award - EG - 01 - 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"

Questionnaire

⚙️ Subcontractors and Joint Ventures

\$ Item

📄 LL34 Compliance

📄 M/WBE Requirements

Answer type : Alternate proposal Response Label : Proposal # 1

Description :

Competition Pool : Road Reconstruction Pool 1

Sealed Subcontractor list opened? : ☐

Responsiveness Status :

INFORMATION ▼

Created by LORI LN LoriFN on 05/24/2020 22:38:52
 Modified by LORI LN LoriFN on 05/25/2020 01:08:58

85020B0273 - Reconstruction of Sidewalks in Bronx and Manhattan (000882): Lot 1 / Round 2

Save
Create new response
Other Actions

Remaining time :
3d 05h 50min 12s

ALERTS

There is an upcoming due date for this RFx.

RESPONSE ACTIVITY

Status :
Canceled
Submitted
In progress


Competition Pool :

| RFx Name | Response Name | Competition Pool | Responsiveness Status | Submission Status | Response Progress | Questions Answered | Submitted on (Your Local Time) |
|---|---------------|--|-----------------------|-------------------|-------------------|--------------------|--------------------------------|
| 85020B0273 - Reconstruction of Sidewalks in Bronx and Manhattan | Proposal # 1 | Reconstruction of Sidewalks in Bronx and Manhattan | | Submitted | 100% | 100% | 05/08/2020 11:50:36 |

You have successfully submitted your response!

You will see a series of notifications with key details regarding your submission.

Within the **Manage Responses** tab, you will see the Submission Status update in green to **Submitted**.



 Mayor's Office of

 Contract Services

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8. Identifying and Responding to Requests for Information (RFI)

This section provides step-by-step instructions on how to find and successfully complete a response to an RFI in PASSPort.

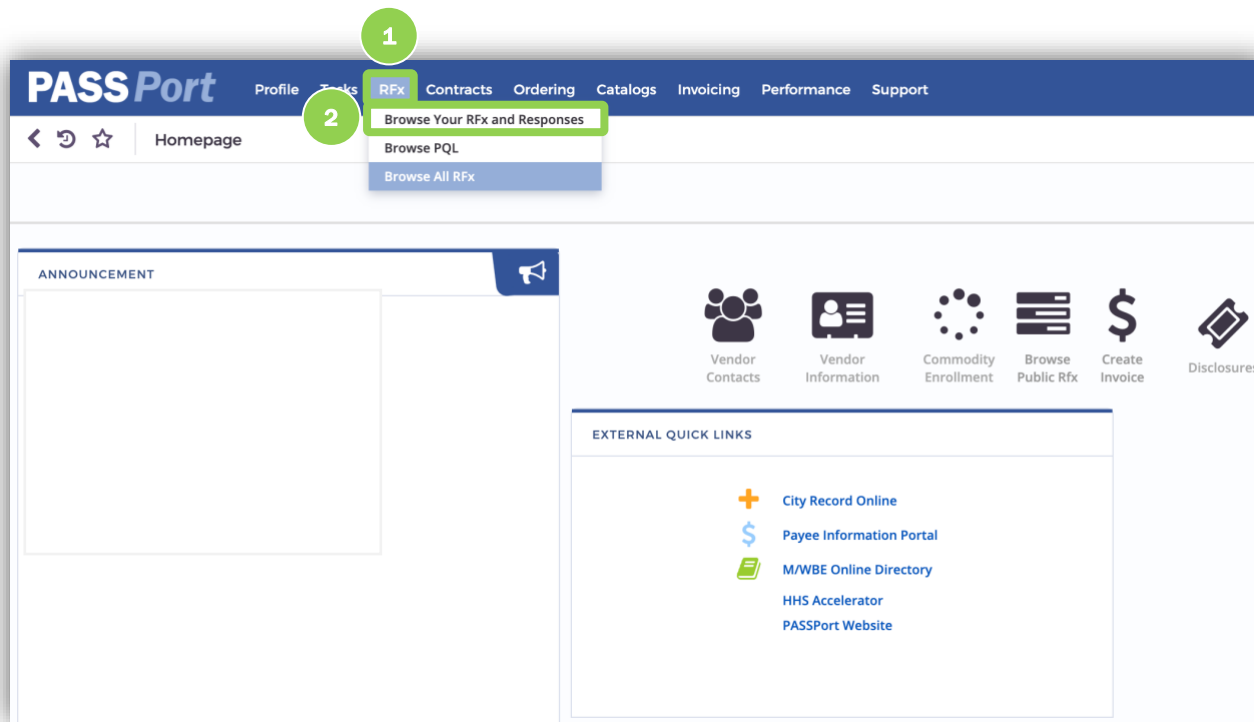
A Request for Information (RFI) is released when agencies would like to request information from Vendors for a variety of reasons, including feedback on Concept Papers for Health and Human Services Competitive Sealed Proposals, quotes for M/WBE Noncompetitive Small Purchases, and Expressions of Interest for Sole Source procurements.

All released RFI will be available in the **Public Portal** and also in the **Browse All RFx** portal in PASSPort. If you are on an Agency's bidders list, you will be notified for upcoming and released RFI through email notifications. You can also browse all RFI for which you have been invited by an Agency to respond, by navigating to the **Browse My RFx** tab in PASSPort.

For RFIs used for M/WBE Noncompetitive Small Purchase method, the contracting agency will identify and contact potential respondents based on the SBS M/WBE Online Directory. Any interested vendor must create a PASSPort account before the RFI is released. Vendors without accounts will be notified by the contracting agency that they need to create an account in PASSPort. The RFI will be released in PASSPort and all vendor responses must be submitted in PASSPort. Only City-certified M/WBE Vendors with PASSPort accounts can submit a response and be awarded a direct contract. Creating a PASSPort account is a simple, two-step process. For additional guidance on how to create an account, please refer to the [Vendor Account Creation Job Aid](#). It may take up to two business days for your account to be approved.

[Learn more about the M/WBE Small Purchase Method here.](#)

Note: To submit a response to an RFI, a Vendor **must** have a PASSPort account prior to the RFI release and log in to its PASSPort account to start the process. Please visit our PASSPort website at www.nyc.gov/passport for more information on signing up for an account in PASSPort.



The steps below outline the process for identifying an RFI through the **Browse Your RFX** section in PASSPort:

1. From any page in PASSPort, click the “**RFX**” menu option at the top of the page.
2. Select “**Browse Your RFX and Responses**” from the drop-down menu.

PASSPort Profile Tasks **RFx** Contracts Ordering Catalogs Invoicing Performance Support

← ↻ ☆ Browse Your RFx and Responses

Keywords: RFX Status:

Round: Agency: Procurement Method: Main Commodity: Additional Commodities:

Program: Industry:

| Program | Industry | EPIN | Agency | Procurement Name | Procurement Method | RFX Status | RFX Open Date (Your Local Time) | RFX Close Date (Your Local Time) | RFx Title |
|-------------|-----------------------|------------|----------------|---|--------------------|------------|---------------------------------|----------------------------------|-----------|
| UAT Program | Professional Services | 81620P0017 | ADMINISTRATION | 81620P0017-Management Consulting Services | Competitive Sealed | Released | 05/07/2020 00:00:00 | 05/29/2020 00:00:00 | Bid |

3. In the **Browse Your RFx and Responses** tab, you can search for all your RFIs by Keywords, Industry, Agency, Procurement Method, and more.

The following steps outline the process for responding to an RFI in PASSPort.

4. Click the **pencil icon** to open the **View RFx** screen.

PASSPort Profile Tasks RFx Contracts Ordering Catalogs Invoicing Performance Support

← ↻ ☆ 03020Y0001-Green Rooftops Initiative (000949) : Lot 1 / Round 1

View RFx

Remaining time: 1d 10h 22min 23s

ALERTS

⚠ There is an upcoming due date for this RFx.

RESPONSE ACTIVITY

SUMMARY

E-PIN: 03020Y0001 06/10/2020 00:00:00

Program:

Agency: DEPARTMENT OF CITY PLANNING

Division: HOUSING,ECONOMIC, AND INFRASTRUCTURE PLANNING

Agency Contact:

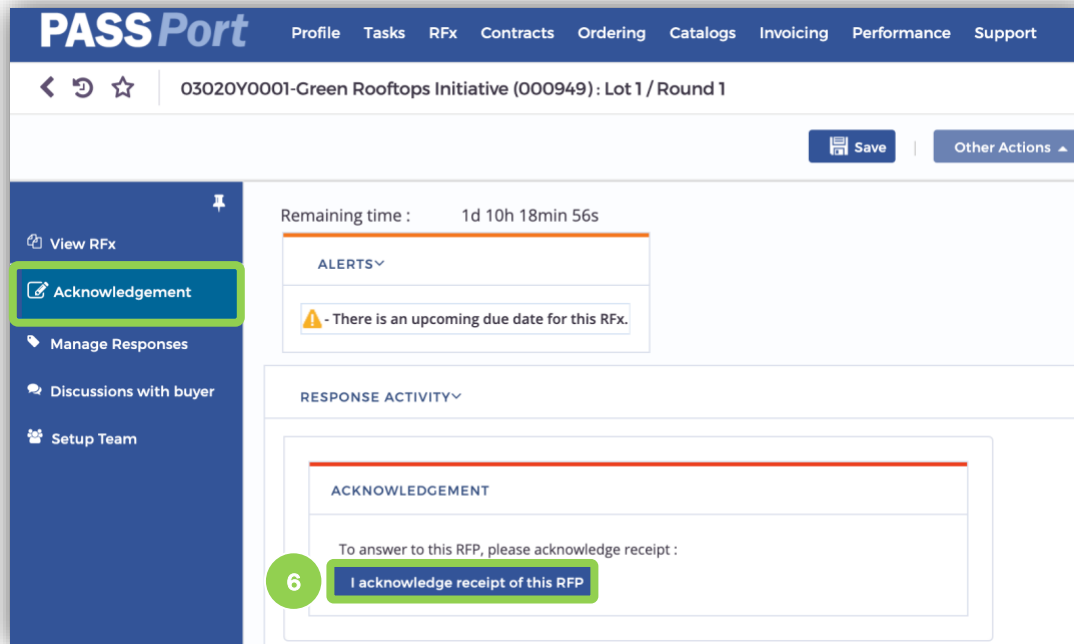
Agency Contact Email:

RFx Title: 03020Y0001-Green Rooftops Initiative

RFx Status: Released

The **View RFx** tab provides an overview of what the agency intends to procure, key dates (anticipated contract start and end dates, release and due dates) and any relevant documents.

5. From the **View RFx** tab, view key details for this RFI, including the **Remaining Time** and **Summary** details.



If your organization intends to respond to the RFI, click on the **“Acknowledgement”** tab.

If an agency requires acknowledgement of receipt, an acknowledgement tile will display in the **Acknowledgement** tab.

6. Click the **“I acknowledge receipt of this RFx”** button.

Upon clicking a response box will appear to confirm the intend respond to this RFI.

03020Y0001-Green Rooftops Initiative (000949) : Lot 1 / Round 1

Save Other Actions

View RFx

Acknowledgement

Manage Responses

Discussions with buyer

Setup Team

Remaining time : 1d 10h 16min 19s

ALERTS

There is an upcoming due date for this RFx.

RESPONSE ACTIVITY

RECEIPT ACKNOWLEDGED ON 06/10/2020 13:43:19 (YOUR LOCAL TIME)

To complete this RFP, please confirm that you intend to bid.

☒ WILL RESPOND: our intent is to respond to this RFx

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

Valid

7. To confirm that you intend to respond to this RFI, click the checkbox next to **“WILL RESPOND: our intent is to respond to this RFx.”** Then click **“Valid.”**

If your organization does *not* intend to respond to the RFI, select **“WILL NOT RESPOND: our intent is not to respond to this RFI”** instead. Selecting this option will prompt a **Reason** box to appear. Please add a brief explanation of the reason for not responding. Then click **“Valid.”**

8. Vendors that selected **Will Respond** may proceed to the **“Manage Responses”** tab to complete the questionnaire.

9. Click the **pencil icon**. A popup window will appear.

Note: There are two more tabs on the left-hand navigation pane: **Discussion with buyer** function allows vendors to communicate directly with an assigned agency contact. See chapter 7.3 for more information. The **Setup Team** tab is for adding contacts to support developing the response. See chapter 7.4 for more information.

03020Y0001-Green Rooftops Initiative (000949) : Lot 1 / Round 1

Save Other Actions

View RFx

Acknowledgement

Manage Responses

Discussions with buyer

Setup Team

Remaining time : 1d 10h 10min 28s

ALERTS

There is an upcoming due date for this RFx.

RESPONSE ACTIVITY

Status :
☒ Canceled
☒ Submitted
☒ In progress

Competition Pool :

| RFx Name | Competition Pool | Submission Status | Response Progress | Questions Answered | Submitted on (Your Local Time) | Response Name |
|--------------------------------------|------------------|-------------------|-------------------|--------------------|--------------------------------|---------------|
| 03020Y0001-Green Rooftops Initiative | | In progress | 0% | 0% | | Proposal # 1 |

"D" YARD INTERNATIONAL, INC's proposal

Save Save and Close Cancel this response Close Check Progress Duplicate Response

RFP 03020Y0002-Green Rooftop Initiative - 1 (Released)

Your Proposal Info

Questionnaire

Subcontractors and Joint Ventures

Item

10 Response Label : Proposal # 1

Description :

Competition Pool :

11

Responsiveness Status :

INFORMATION

Created by FARMER Gwen on 06/10/2020 14:59:32

Response ID :

10. On the first tab of the popup window, **Your Proposal Info**, complete the **Response Label**. **Note:** This field will be pre-populated. To edit, simply overwrite the text.

11. Select the **Competition Pool**. Click the **ellipsis** and select the appropriate competition pool. Clicking into the **Competition Pool** field is another option. Upon clicking the drop-down list all available competition pool names will appear.

"D" YARD INTERNATIONAL, INC's proposal

Save Save and Close Cancel this response Close Check Progress Duplicate Response

RFP 03020Y0002-Green Rooftop Initiative - 1 (Released)

Your Proposal Info

Questionnaire 12

Subcontractors and Joint Ventures

Item

Campaign : 03020Y0002-Green Rooftops
Supplier : "D" YARD INTERNATIONAL, INC
Respondent : Farmer Gwen

Agency : DEPARTMENT OF CITY PLANNING
Commodity : 117 - Roofing/Siding Services

Request for Information Questions 0%

Request for Information Questions

Please share your background planning and implementing Green Rooftop programs...

At "D" Yard, we have extensive experience ...

12. Click on the **Questionnaire** tab. This tab displays questions the agency wants you to respond to as part of the RFI and will be used for informational and/or responsiveness purposes. A questionnaire may include one or more sections. By default, the questionnaire will default to the first section. You may navigate between sections at any time. A progress bar will display the percentage of questions completed for your reference. Enter your responses in the available text box(es).

"D" YARD INTERNATIONAL, INC's proposal

Save Save and Close Cancel this response Close Check Progress Duplicate Response

Your Proposal Info

Questionnaire

Subcontractors and Joint Ventures

Item

03020Y0002-Green Rooftops
"D" YARD INTERNATIONAL, INC
Farmer Gwen

Agency : DEPARTMENT OF CITY PLANNING
Commodity : 117 - Roofing/Siding Services

Request for Information Questions 0%

Request for Information Questions

Please share your background planning and implementing Green Rooftop programs...

At "D" Yard, we have extensive experience ...

CREATION BY IMPORT

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

Drop here your answer (in Excel format)

Upload (in Excel Format)

Note: PASSPort enables you to download an Excel workbook to complete outside of the system or to share with a team member without a PASSPort account. After the questions are answered, upload the form (in Excel format). Your answers will automatically populate in PASSPort.

"D" YARD INTERNATIONAL, INC's proposal

13

Save Save and Close Cancel this response Close Check Progress Duplicate Response

Your Proposal Info

Questionnaire

Subcontractors and Joint Ventures

Item

Campaign : 03020Y0002-Green Rooftops
 Supplier : "D" YARD INTERNATIONAL, INC
 Respondent : Farmer Gwen

Agency : DEPARTMENT OF CITY PLANNING
 Commodity : 117 - Roofing/Siding Services

Request for Information Questions

0%

Request for Information Questions

Please share your background planning and implementing Green Rooftop programs...

At "D" Yard, we have extensive experience . . .

13. The action buttons at the top of the page allow you to **Save** progress, **Cancel this response** (if necessary), **Check Progress** to view a list of remaining steps and **Duplicate Response**, if desired.

"D" YARD INTERNATIONAL, INC's proposal

16 [Save](#) [Save and Close](#) [Cancel this response](#) [Close](#) [Check Progress](#) [Duplicate Response](#)

14 [Your Proposal Info](#)
[Questionnaire](#)
[Subcontractors and Joint Ventures](#)
[\\$ Item](#)

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)

[Upload \(in Excel Format\)](#)

Total: [Total per currency](#)
 Currency: **USD**
 Proposal Amount: 0.00

Filter
 Keywords: Not answered items: ☐ [Search](#) [Reset](#)

15 **Bid Sheet**

| | Label | Items code | Item types | Quantity | Units | Price | Total Price |
|--|------------------------|------------|---------------|----------|-------|----------------------|-------------|
| | Green Roof Sample Item | I1_1 | Required Item | 1.00 | each | <input type="text"/> | |

1 Result(s)

14. Price components for RFIs will be collected within the **Item** tab. For M/WBE Noncompetitive Small Purchases, the items grid will be the place quotes will be collected.

15. The **Item** tab may be completed directly in the system or you may download, complete and upload a quotation form (in Excel format) for PASSPort to automatically populate the responses you provided.

16. Click the **"Save"** button.

Note: Subcontractors and Joint Ventures are not allowed for this procurement method.

"D" YARD INTERNATIONAL, INC's proposal

17

Save Save and Close Cancel this response Validate & Submit Close Duplicate Response

✓ Data has been saved

▼ Your Proposal Info

Questionnaire

Subcontractors and Joint Ventures

\$ Item

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)

Upload (in Excel Format)

Total : Total per currency
USD 6,500.00

Currency : USD ▼

Proposal Amount : 6,500.00

Filter

Keywords : Not answered items : ☐ Search Reset

Bid Sheet

| | Label | Items code | Item types | Quantity | Units | Price | Total Price |
|--|------------------------|------------|---------------|----------|-------|----------|-------------|
| | Green Roof Sample Item | I1_1 | Required Item | 1.00 | each | 6,500.00 | 6,500.00 |

1 Result(s)

17. Upon saving your prices, a green “Validate & Submit” button will appear. Click this button to submit your response.

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

This concludes the Finding and Responding RFx User Manual. Please see the Award Activities User Manual for step-by-step guidance on the award phase of the procurement process.