# Provider Guide to the NYC Procurement Roadmap: Monitor Funding Opportunities

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# Introduction to the NYC Procurement Roadmap

The New York City Procurement Roadmap shows a list of all competitive Health and Human Services funding opportunities available to providers through participating HHS Accelerator Agencies.

Funding opportunities – referred to as procurements -- represent the City's investments in critical services. Each listing on the roadmap includes important dates and details which affect your ability to compete. We invite you to carefully review the details of each procurement to determine if your organization is best positioned to respond with proposals. Your organization's status related to each procurement is displayed and this indicates any actions you may need to take.

The Procurement Roadmap can be used to:

- Plan for upcoming procurements, some listed months in advance of anticipated release
- Check your organization's status for each procurement
- Manage multiple proposals for one or more procurements
- Prioritize work based on key dates.

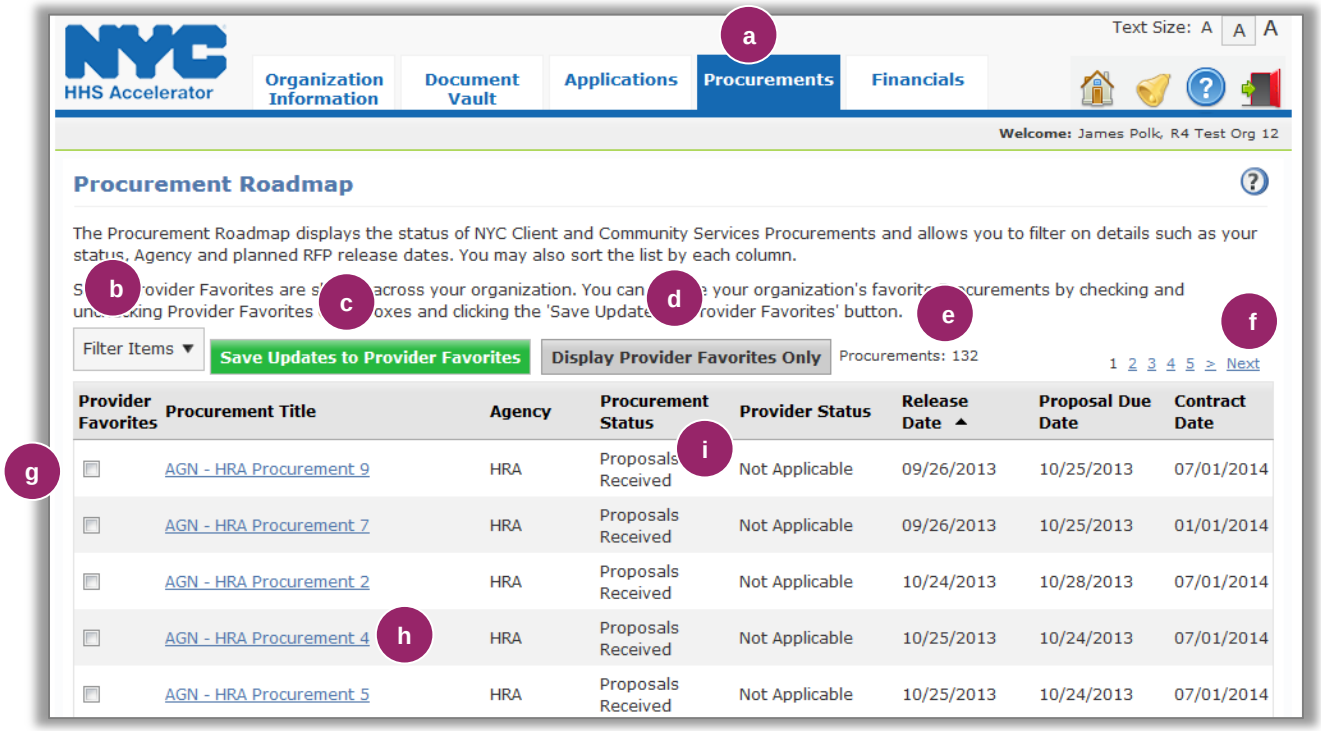
Organizations eligible to propose will compete with each other for funding. Important details about proposal requirements are included in Request for Proposal (RFP) documents. These documents can only be viewed by eligible providers after procurements have been released. Once the due date for proposals has passed, submissions will be reviewed and scored by the City based on criteria included in the RFP documents and in accordance with all applicable procurement rules. Selected proposers will be notified of awards and given additional instructions prior to anticipated program start dates.

For convenience, basic background information about all funding opportunities published in the HHS Accelerator System is also available for review at nyc.gov/hhsaccelerator. However, you must be logged into your organization's HHS Accelerator account to learn more about each procurement, identify possible service partners, receive updates, and view RFP documents.

The Procurement Roadmap will serve as an essential planning and management tool for organizations delivering Health and Human Services to New Yorkers.

# Understanding the Roadmap

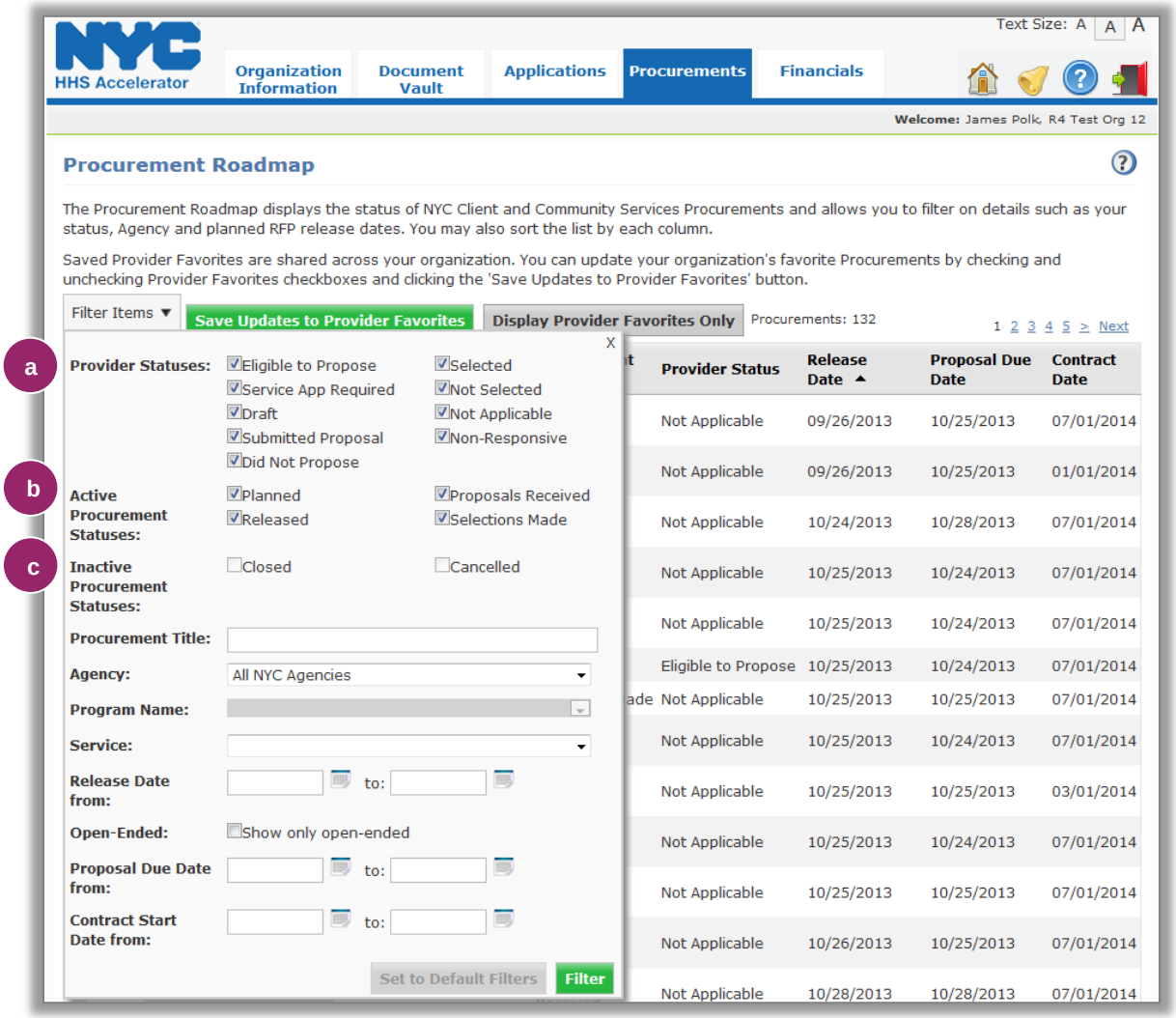
You must log into your HHS Accelerator Account to view and navigate the Procurement Roadmap. The Procurement Roadmap is located in the Procurements section of the HHS Accelerator System. To access the roadmap, click Procurements.




| | |
|---|---|
| **a.** | The Procurements tab allows you to access the Procurement Roadmap. |
| **b.** | The Filter Items button allows you to change which procurements are displayed. |
| **c.** | Save Updates to Provider Favorites allows you to add Procurements to your Favorites list. |
| **d.** | Display Provider Favorites Only, allows you to filter the roadmap based on your favorite procurements. |
| **e.** | The number of procurements displayed based on applied filters is listed. |
| **f.** | The Next hyperlink allows you to view other pages when multiple ones are displayed. |
| **g.** | Check box to select Procurements to add to your Favorites List. |
| **h.** | Click the Procurement Title to view the specific procurement you are interested in. |
| **i.** | Provider Status indicates your organization's status based on required or completed actions. |

Your view of procurements can be modified by clicking on a column header or by filtering items. For example, you may sort procurements by proposal due date so you can prioritize prequalification applications or drafting of proposal documents within your organization. You can click on the Proposal Due Date column header and change the view by ascending or descending order.

Filtering allows you to target your search and quickly modify procurements displayed on the roadmap. After you click the Filter Items button the filter menu displays with a number of options for modifying displayed procurements. By default all Provider and Active Procurement Statuses are checked, and All NYC Agency is selected in the Agency drop-down menu. To adjust your filtered options, you must uncheck relevant boxes.




| | |
|---|---|
| a. | Provider Statuses indicate actions taken or required. |
| b. | Active Procurement Statuses indicate procurements requiring action either by the City or providers. |
| c. | Inactive Procurement Statuses indicate procurements for which there are no additional actions. To filter by Inactive Procurement Statuses, uncheck all boxes in Active Procurement Statuses rows |

You may also filter by Procurement Title, a specific Agency and Service. Enter periods using dates to further refine your search. Remove any dates to broaden your search. For example, if the system directs you to the Procurement Roadmap after clicking a number related to RFPs you're eligible for, the roadmap will be filtered on dates.

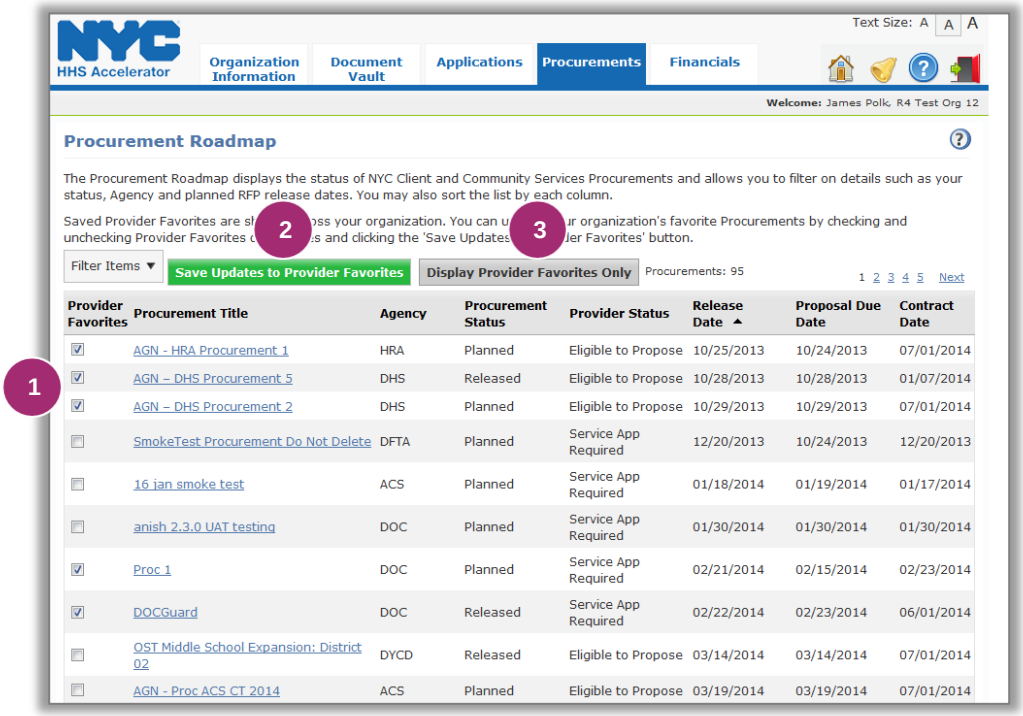
Below are brief definitions for Provider and Procurement statuses to guide you as you navigate the Procurement Roadmap and consider various RFPs. Based on the procurement details and your status, you may take the appropriate action.

| Provider Status | Definition |
|---|---|
| Eligible to Propose | Your organization is eligible to submit a proposal. One or more Service Applications have been approved. |
| Service App Required | A Service Application is required. Submit an application for at least one of the services listed. Your application must be reviewed and approved. |
| Draft | At least one proposal has been started but proposals have not been submitted. |
| Submitted Proposal | Your organization has submitted one or more proposals to an eligible RFP. |
| Did Not Propose | Your organization did not submit a proposal but was Eligible to Propose or had a proposal started. |
| Selected | At least one of your organization's proposals was selected for award. |
| Not Selected | None of your organization's proposals were selected for the specified RFP. |
| Not Applicable | Your organization was not eligible to propose (i.e. the status of Service App Required). |

| Procurement Status | Definition |
|---|---|
| Planned | You are able to view basic information about the procurement, required services, and contact information for other providers eligible to propose. RFP documents have not yet been published. Note the anticipated release date and continue to monitor the roadmap. |
| Released | If Eligible to Propose, you are able to view RFP documents and submit proposals. |
| Proposals Received | The proposal due date has passed. Proposals are not accepted after the due date. |
| Selections Made | Accelerator has approved all the selected winning providers submitted by the Agency and the providers have been notified that the results are in. |
| Closed | Selections have been made and no additional actions are required related to this procurement. You may view RFP documents even if you were not previously eligible to propose. |
| Cancelled | The City has made the decision to not move forward with the procurement. |

# Customizing your Procurement Roadmap

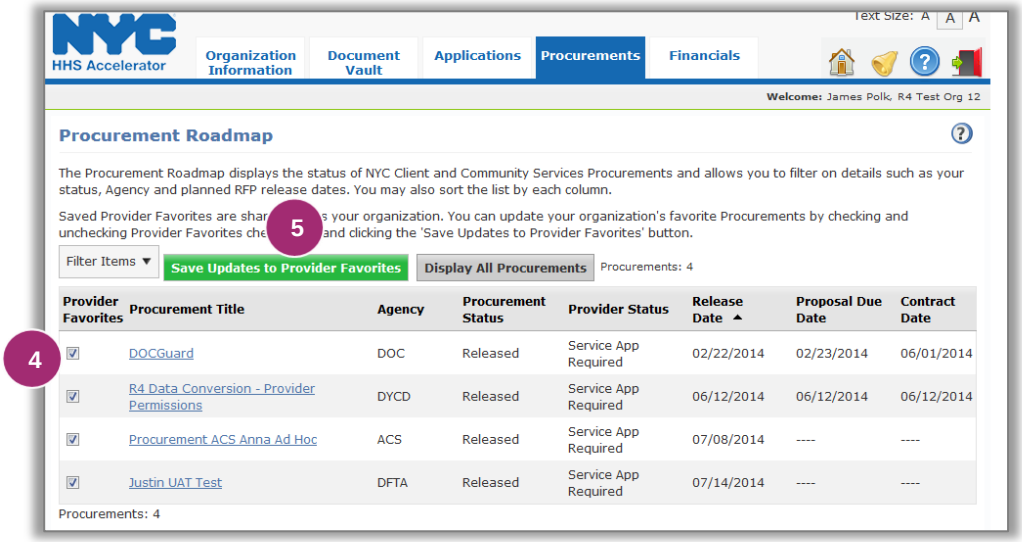
Your organization can customize the Procurement Roadmap, by adding procurements to your Favorites List. To customize your Procurement Roadmap, take the following steps:




| Provider Favorites | Procurement Title | Agency | Procurement Status | Provider Status | Release Date | Proposal Due Date | Contract Date |
|---|---|---|---|---|---|---|---|
| ☑ | AGN - HRA Procurement 1 | HRA | Planned | Eligible to Propose | 10/25/2013 | 10/24/2013 | 07/01/2014 |
| ☑ | AGN – DHS Procurement 5 | DHS | Released | Eligible to Propose | 10/28/2013 | 10/28/2013 | 01/07/2014 |
| ☑ | AGN – DHS Procurement 2 | DHS | Planned | Eligible to Propose | 10/29/2013 | 10/29/2013 | 07/01/2014 |
| ☐ | SmokeTest Procurement Do Not Delete | DFTA | Planned | Service App Required | 12/20/2013 | 10/24/2013 | 12/20/2013 |
| ☐ | 16 jan smoke test | ACS | Planned | Service App Required | 01/18/2014 | 01/19/2014 | 01/17/2014 |
| ☐ | anish 2.3.0 UAT testing | DOC | Planned | Service App Required | 01/30/2014 | 01/30/2014 | 01/30/2014 |
| ☑ | Proc 1 | DOC | Planned | Service App Required | 02/21/2014 | 02/15/2014 | 02/23/2014 |
| ☑ | DOCGuard | DOC | Released | Service App Required | 02/22/2014 | 02/23/2014 | 06/01/2014 |
| ☐ | OST Middle School Expansion: District 02 | DYCD | Released | Eligible to Propose | 03/14/2014 | 03/14/2014 | 07/01/2014 |
| ☐ | AGN - Proc ACS CT 2014 | ACS | Planned | Eligible to Propose | 03/19/2014 | 03/19/2014 | 07/01/2014 |

*Once you have navigated to Procurements.*

1. Check the **"Provider Favorites"** box for each procurement you would like to add to your favorites list.
2. Click the **"Save Updates to Provider Favorites"** button.
3. Click the **"Display Provider Favorites Only"** button.

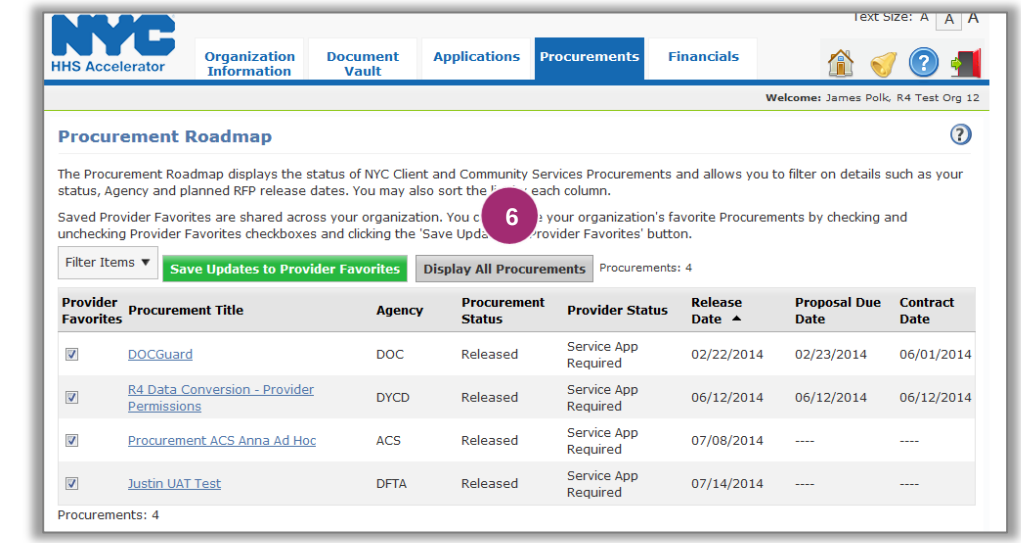



*Now only your favorite procurements are displayed.*

*Selected favorites are displayed to all organization staff who can view procurements, and changes affect all users.*

4. To remove a procurement from your favorites list, uncheck the **"Provider Favorites"** box next to the procurement.

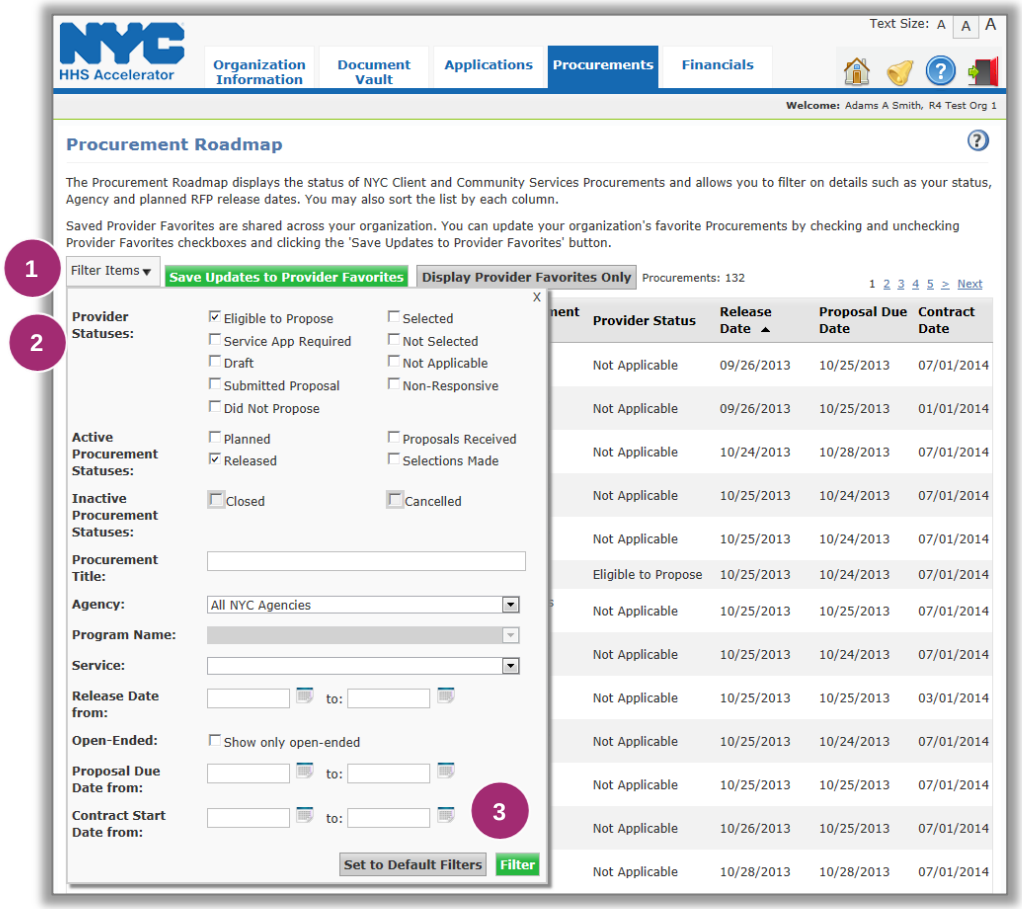
5. Click the **"Save Updates to Provider Favorites"** button.




6. To return to view all procurements click on the **"Display all Procurements"** button.

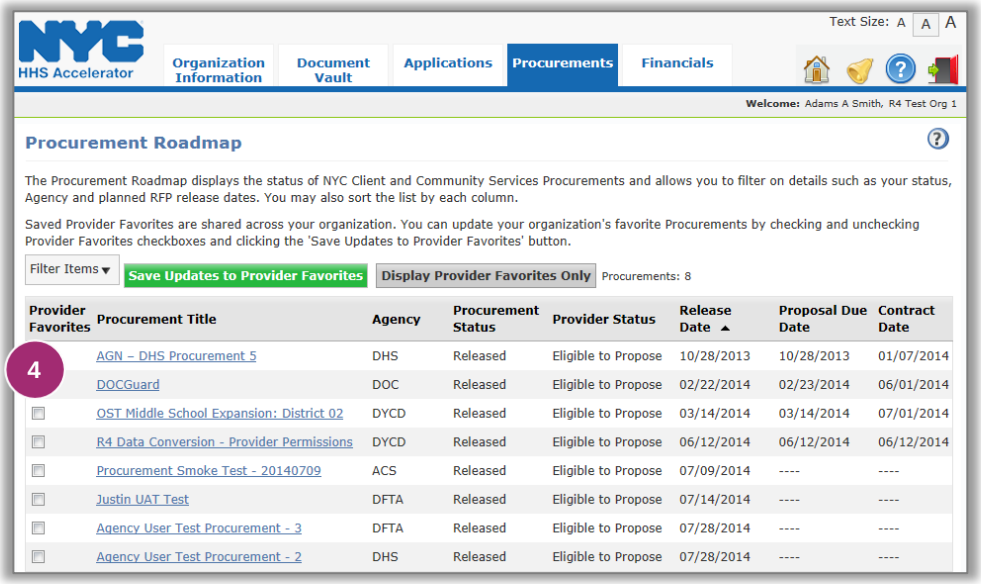
# Accessing Procurement Details

To view additional details about a procurement, take the following steps.




*Once you have navigated to Procurements.*

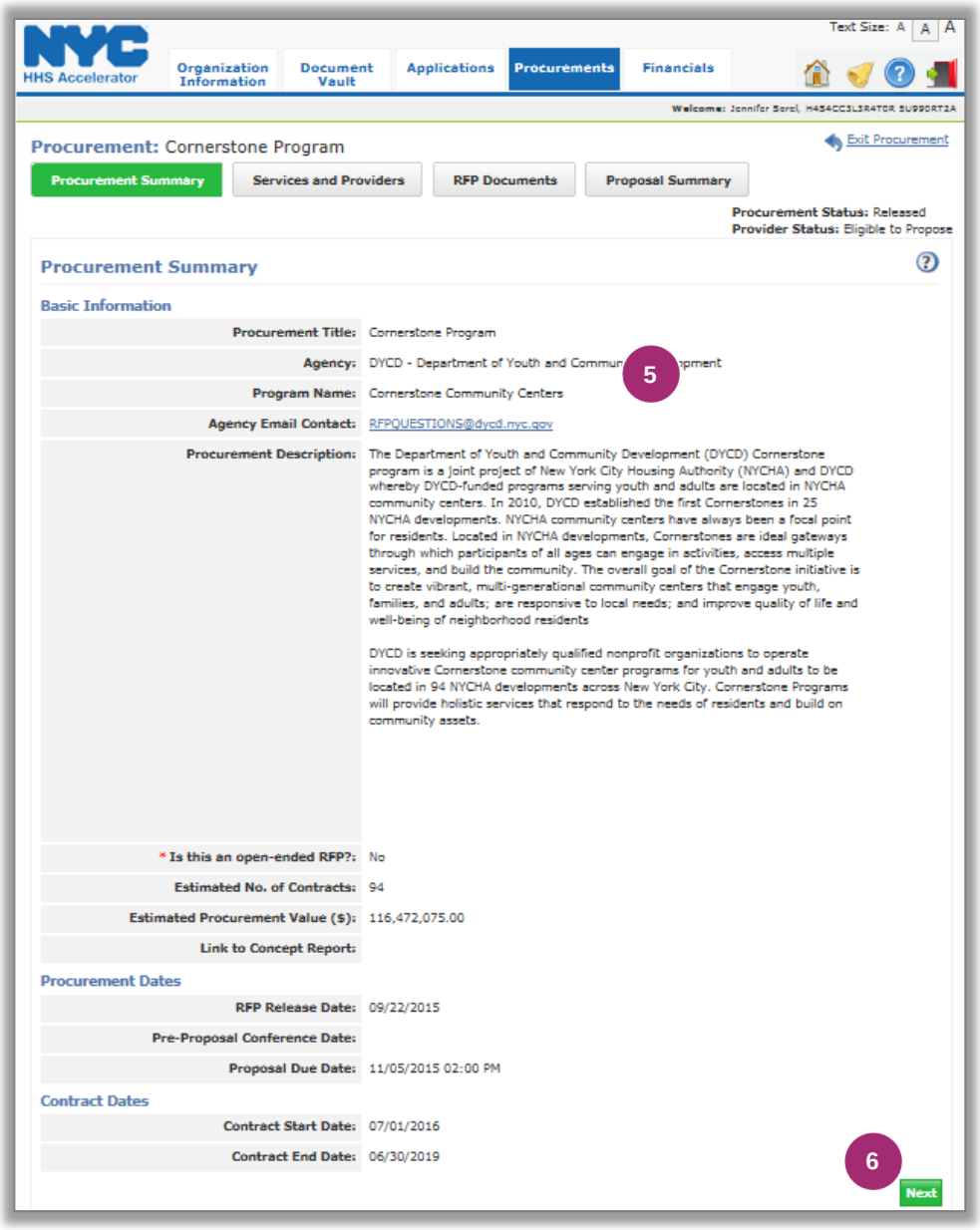
1. Click the **"Filter Items"** button.
2. Remove all selections other than **"Eligible to Propose"** and **"Released."**
3. Click the **"Filter"** button.




| Provider Favorites | Procurement Title | Agency | Procurement Status | Provider Status | Release Date | Proposal Due Date | Contract Date |
|---|---|---|---|---|---|---|---|
| | AGN – DHS Procurement 5 | DHS | Released | Eligible to Propose | 10/28/2013 | 10/28/2013 | 01/07/2014 |
| | DOCGuard | DOC | Released | Eligible to Propose | 02/22/2014 | 02/23/2014 | 06/01/2014 |
| | OST Middle School Expansion: District 02 | DYCD | Released | Eligible to Propose | 03/14/2014 | 03/14/2014 | 07/01/2014 |
| | R4 Data Conversion - Provider Permissions | DYCD | Released | Eligible to Propose | 06/12/2014 | 06/12/2014 | 06/12/2014 |
| | Procurement Smoke Test - 20140709 | ACS | Released | Eligible to Propose | 07/09/2014 | ---- | ---- |
| | Justin UAT Test | DFTA | Released | Eligible to Propose | 07/14/2014 | ---- | ---- |
| | Agency User Test Procurement - 3 | DFTA | Released | Eligible to Propose | 07/28/2014 | ---- | ---- |
| | Agency User Test Procurement - 2 | DHS | Released | Eligible to Propose | 07/28/2014 | ---- | ---- |

*The system displays procurements for which you can submit proposals.*

4. Click on the hyperlink for the **"Procurement Title"** you wish to view.



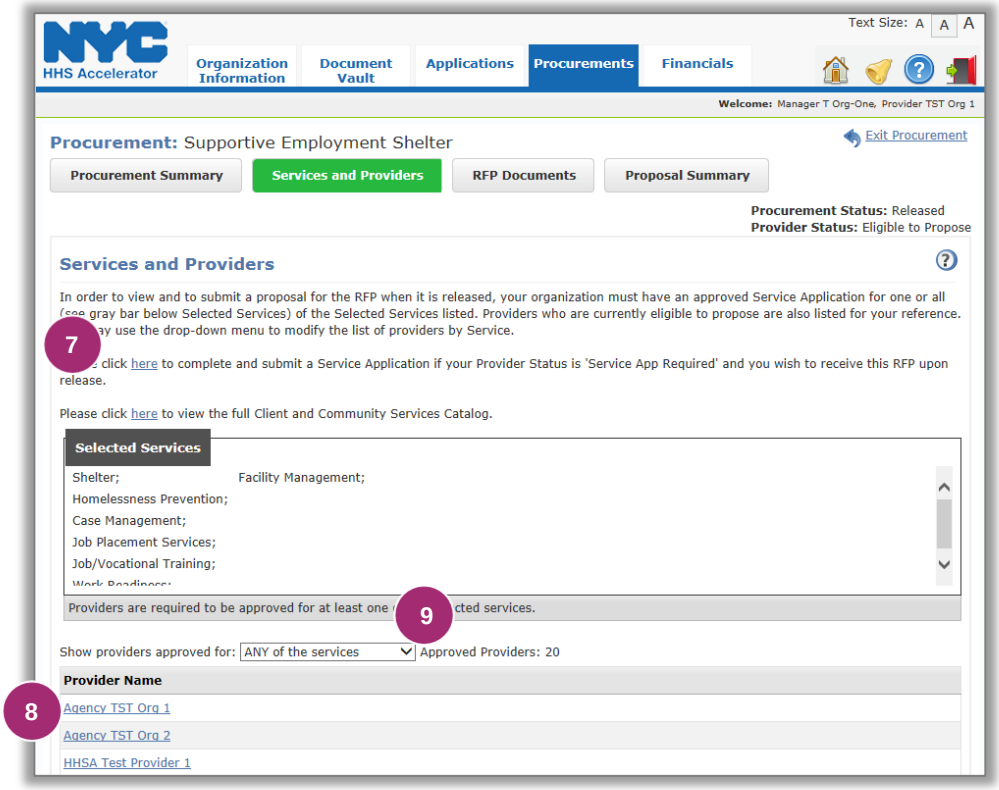

*The system displays basic information in the Procurement Summary. Important dates to note are the Pre-Proposal Conference and Proposal Due Date*

5. Copy-Paste or Click the hyperlink for the "**Agency Email Contact**" to send specific questions about the content of a procurement or RFP documents.

*Any questions related to system use should be sent directly to the HHS Accelerator Team using the section level help by clicking* ?

6. Click **"Next"** or the "**Services and Providers"** tab to view required services and other providers eligible to propose.

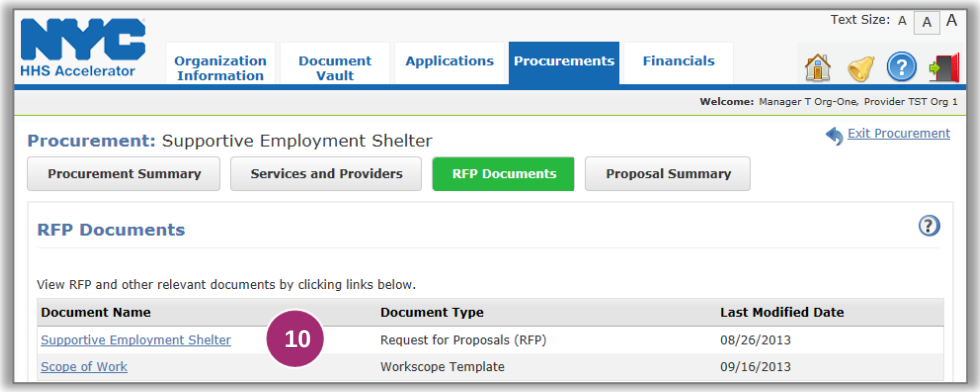
*Review the list of required services and providers. If you are already eligible to compete you may apply for prequalification in other services at any time.*




7. If a service application is required click on the hyperlink (“here”) and you will be directed to the Summary of Applications page. Once there, click “**Add Service**” to complete a Service Application.

8. Providers approved for at least one listed service are shown by “**Provider Name.”** Click on a **“Provider’s Name”** to display basic contact information, including a telephone number to facilitate partnerships.

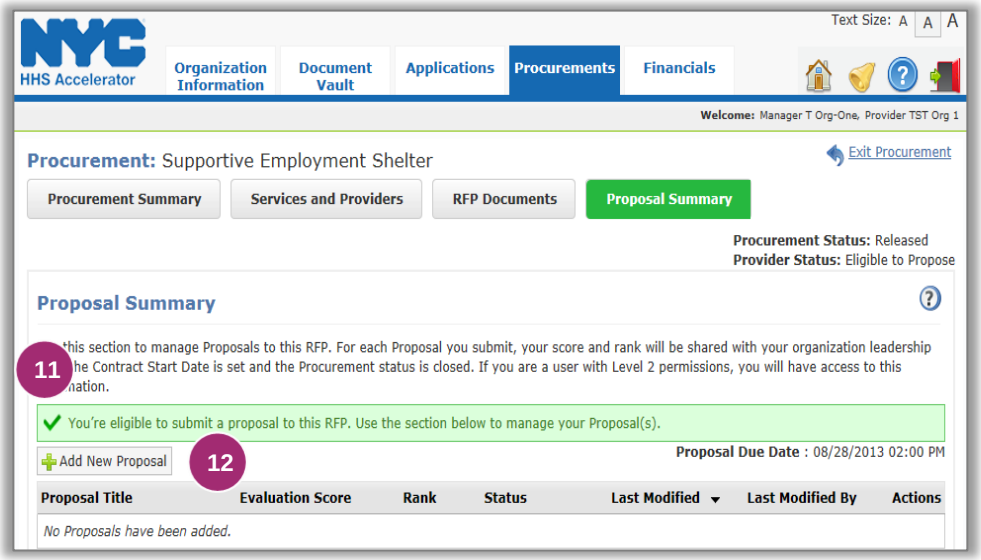
9. Use the drop down menu to “**Show providers approved for”** a specific service.




*The RFP Documents tab displays the RFP and other relevant documents.*

10. To view any of these documents, click the link for the specific "**Document Name**."

*The content of this tab is not visible if a procurement is in Planned status or none of the required services were approved for your organization.*




*Once you have fully reviewed RFP documents, continue to the Proposal Summary tab.*

11. A *green message bar confirms your eligibility with the following message:* **"You're *eligible to submit a proposal to this RFP. Use the section below to manage your Proposal(s)."***

12. To begin your response, click **"Add New Proposal."**

For more on proposal submission, review the "**Submitting Proposals in HHS Accelerator"** user guide.