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](http://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.
The Public Portal is searchable by Keywords, Industry, Agency, Main Commodity, Program, RFx Status, and more.

2. Once you input search criteria, click the “Search” button. The results of your search will appear.

3. To view information or learn more about a specific RFx, click the pencil icon to open the View RFx screen.
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. 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](http://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.
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.
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.

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**Table:**

<table>
<thead>
<tr>
<th>Program</th>
<th>Industry</th>
<th>EPN</th>
<th>Agency</th>
<th>Procurement Name</th>
<th>Procurement Method</th>
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<tr>
<td>UAT Program</td>
<td>Construction</td>
<td>B502080274</td>
<td>PUBLIC BUILDINGS</td>
<td>UAT CSB Sourcing Template - Sealed Subcontractor List</td>
<td>Competitive Sealed Bid</td>
</tr>
<tr>
<td>UAT Program</td>
<td>Construction</td>
<td>B502080273</td>
<td>PUBLIC BUILDINGS</td>
<td>B502080273 - Reconstruction of Sidewalks In Bronx and Manhattan</td>
<td>Competitive Sealed Bid</td>
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<tr>
<td>UAT Program</td>
<td>Professional Services</td>
<td>81620P0017</td>
<td>ADMINISTRATION</td>
<td>81620P0017-Management Consulting Services</td>
<td>Competitive Sealed Proposal</td>
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<tr>
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<td>DISEASE CONTROL</td>
<td>81620P001-UAT CSP GD II</td>
<td>Competitive Sealed Proposal</td>
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<td>06820P0053-Req. 04/09/2020_UAT_CMB_Payer_Reserve_&lt;100000_ZERO</td>
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<td>OFFICE OF THE COMMISSIONER</td>
<td>06820P0022-Kapil Thakkar</td>
<td>Competitive Sealed Proposal</td>
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<tr>
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<td>INFRASTRUCTURE</td>
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<tr>
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<td>85620B0020</td>
<td>CHIEF OF STAFF</td>
<td>85620B0020-RP-UAT CSB Req. 02/20/2020</td>
<td>Competitive Sealed Bid</td>
</tr>
</tbody>
</table>
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.
3. 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.

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For more information and resources, visit the HHS Accelerator website at [www.nyc.gov/hhsaccelerator](http://www.nyc.gov/hhsaccelerator) and [Learning to Use PASSPort Webpage](http://Learning to Use PASSPort Webpage). The MOCS Service Desk is available at [help@mocs.nyc.gov](mailto:help@mocs.nyc.gov) for support.
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.
3. Utilize the search fields to find your desired opportunity.

4. Click the "Search" button to see the search results.

5. 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.
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.
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.
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.

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.
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.
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.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description/Task Authorizations</th>
</tr>
</thead>
</table>
| Vendor Admin                  | 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         | 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          | Receive direct invite to participate in RFx response  
Can add users to the vendor response team  
Can create a response           |
| Vendor Financials L2          |                                                                                                   |
| Contributor                   | Can create/edit a response when added to the team in the Setup Team Tab                          |
| Vendor Contract Signatory     | Can create/edit a response when added to the team (Can sign the authored contract agreement at the Contract stage) |

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.
2. 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
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.

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.
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.

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.
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.

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%.
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.
Agencies may also request affirmations within the Questionnaire tab. The progress bar will update after each affirmation is completed and saved.
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.

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.
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.
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.”
6. If applicable, click the “Add Joint Venture” button.
Upon clicking the “Add Joint Venture” button, a Joint Venture window will appear.

7. Click on the ellipsis to identify the PASSPort vendor.
8. 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.

9. Click the checkbox to select the vendor related to your joint venture.
10. Click the "Save" button to save your selection.

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

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.
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.

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.
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.
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.
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.
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.
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.

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.
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.

1. Once your response is complete, and all required information has been submitted, the “Validate & Submit” button will appear. Click the button to proceed.
2. Carefully read the disclosure. Click the checkbox to provide sign-off on the accuracy of the response.

3. 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!
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.
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.
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.

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.
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 RFI.” 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.
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.
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).

**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.
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.
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.
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.