PASSPort
Procurement and Sourcing Solutions Portal

Performance Evaluations for Vendors

Roles Involved: • Vendors	Summary: Step-by-step instructions on how to review and respond to Performance Evaluations in PASSPort.

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NYC
Mayor's Office of
Contract Services

Table of Contents

Accessing PASSPort

To access PASSPort and log in using your NYC.ID credentials, go to http://www.nyc.gov/passport

Note: While navigating PASSPort you are able to easily increase its font size and readability. To do this, click the "ctrl" and "+" keys simultaneously on your keyboard. Each time you click these keys, your web browser will zoom in and PASSPort will resize accordingly. To reduce PASSPort's font size, simultaneously click the "ctrl" and "-" keys.

1. Performance Evaluations Overview

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

The Performance Evaluation (PE) process in PASSPort allows Agencies to assess a vendor's performance on City contracts in one centralized system. PEs are required at least once annually from the contract start date; however, annual PEs are not required for:

- Procurements of goods by Competitive Sealed Bid (CSB), other than those awarded based on best value;
- Procurements below the small purchase limit.

The following types of contracts will always require an annual PE:

- General Contracts (CT1s)
- Task Orders (CTA1s)

When a PE needs to be completed, the Agency completing the PE will assign an evaluator to each of the three PE categories:

1. Timeliness of Performance
2. Fiscal Administration and Accountability
3. Performance and Overall Quality of Service/Goods

Evaluators will complete PE scorecards, which consists of answering questions relating to the previously mentioned categories and assigning a rating for each category. Once all of the PE scorecards are approved, the Agency will review and approve the PE and send it to you.
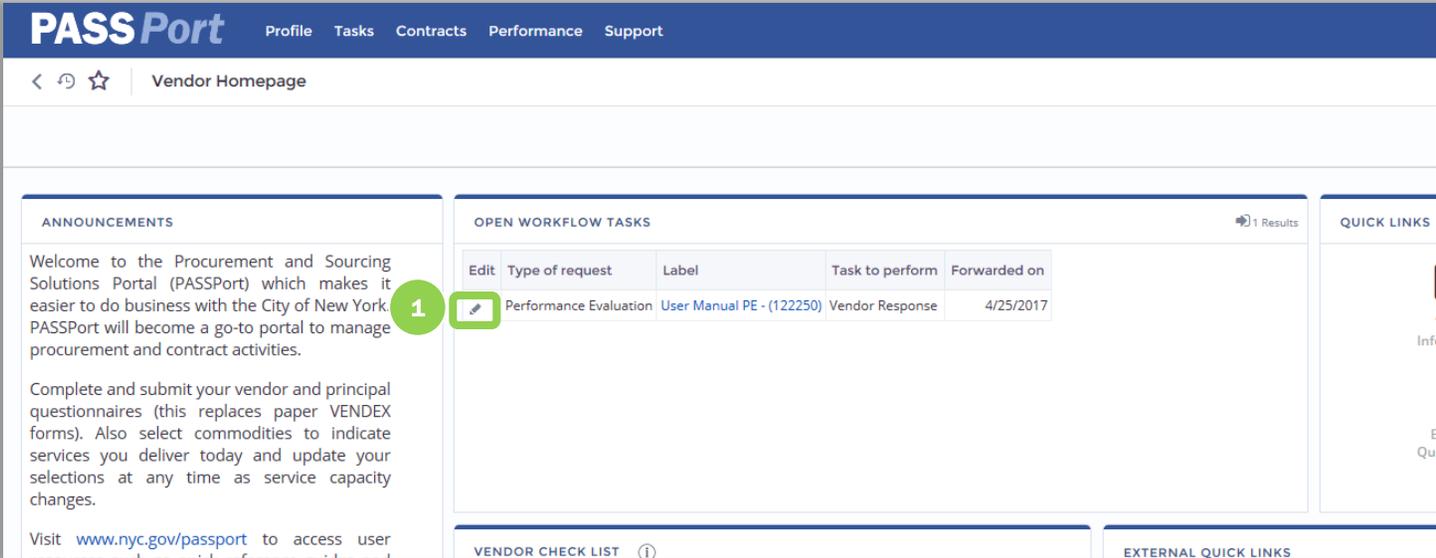
You will receive an email notification indicating that a new PE has been issued for you to review. When reviewing PEs, the overall PE score and rating, each of the category scores, and the answers and comments for the entire evaluation will be visible to you. You have 15 calendar days to submit an appeal for a PE and the PE will auto-finalize if a response is not received within this 15-day window.

2. Reviewing and Responding to a Performance Evaluation

When a PE is created by an Agency, you will receive an email notification indicating that a new PE has been issued for you to review. When reviewing PEs, the overall PE score and rating, each of the category scores, and the answers and comments for the entire evaluation will be visible to you. After reviewing a PE, you can choose to accept it or submit an appeal. You have 15 calendar days from the date in which notification was sent to you of a completed PE to submit a response.

If there is no response from you within 15 calendar days, or you accept the PE, the PE is closed and finalized. At the point, the PE is able to be viewed across City Agencies in PASSPort.

Follow the below steps to review and respond to a PE in PASSPort.

Whenever a PE requires your review, you will receive both an email notification and a task in PASSPort.

1. From the PASSPort homepage, open the PE that requires your review from the Open Workflow Tasks window.

   PEs require your review will have a **"Task to perform"** of *Vendor Response.* Click the ✏ icon to open the PE.

The PE is displayed. On this page you can review the following information:

- **"Label":** The name of the PE
- **"Description":** Additional information regarding the PE
- **"Evaluation Period":** The period being evaluated
- **"Begin Date"** The date the evaluation started
- **"End Date":** The date the evaluation was due to be completed by the City
- **"Status":** The PE's status in PASSPort (the status will always be *Vendor Review* for any PEs that are sent to you for review)

In addition, you will also be shown the overall PE score and rating for the evaluation and the individual category scores for **"Timeliness of Performance," "Fiscal Administration and Accountability,"** and **"Performance and Overall Quality."** The graphic above the category scores maps each of the individual category scores. In this example, the vendor has received an overall PE score of 88, which corresponds to a rating of *Excellent.*

2. To review the individual scorecards that were completed to create this PE, click the ✎ icon at the bottom of the page. The **"Evaluations"** table will have anywhere from one to three scorecards, depending on how the PE was created.

The scorecard is displayed. Review the questions, answers, and comments for the **"Timeliness of Performance"** category.

If the scorecard was for multiple categories, you would see each category on the left side of the page. You would then be able to navigate to another category, by clicking on its name on the left side of the page.

3. Click the **"Close"** button once you are done reviewing the scorecard.

Note: *You are able to download the questions, answers, and comments for the entire questionnaire by clicking the **"Download in Excel 2007-2010 format (.xlsx)"** button.*

4. After you are done reviewing the PE, click the **"Dispute"** button if you would like to submit an appeal, or the **"Accept"** button to finalize the PE.

If you click the **"Dispute"** button, you will be prompted to enter in comments that indicate why you are disputing the PE. These comments will be sent to the Agency who created the PE. You should **email** any supporting documentation for your appeal outside of PASSPort.

The Agency will review your comments and documentation and either re-open the PE and have the evaluators re-submit their evaluations; or they will decide to finalize the PE and keep the results as they are. You will receive email notifications regarding any updates regarding this PE.

If you click the **"Accept"** button, the PE will be finalized and will be added to your vendor account.

In PASSPort, Vendors are able to access any finalized PEs and their results whenever they would like. PEs can be accessed via the Performance → Manage Your Performance main menu navigation. From this page, you can search for and view any PE's that have been created for your account.

This user manual provides step-by-step instructions on how to review and respond to Performance Evaluations in PASSPort. If you have any questions on the Performance Evaluation process, please contact MOCS at help@mocs.nyc.gov.