



# **DIR BidStamp Training Guide: Vendor Information System Portal**

May 8, 2017

Vendor Version 1.0

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# VIS Portal Training Guide

## 1 Overview

### 1.1 Training Guide Overview: Vendor Information System (BidStamp VIS) Portal

The training guide for the BidStamp VIS Portal is organized into the following major components:

- **Vendor Account Requests:** how vendors request a BidStamp VIS account from DIR.
- **Vendor Account Management:** how vendors should edit their account information after their VIS Portal account has been created.
- **Vendor Solicitation Response:** how vendors should submit a response through the BidStamp VIS Portal.

### 1.2 Audience

The primary users of the BidStamp VIS Portal will be vendors/potential vendors. Vendors and potential vendors can create and manage their account information and submit solicitation responses through the portal.

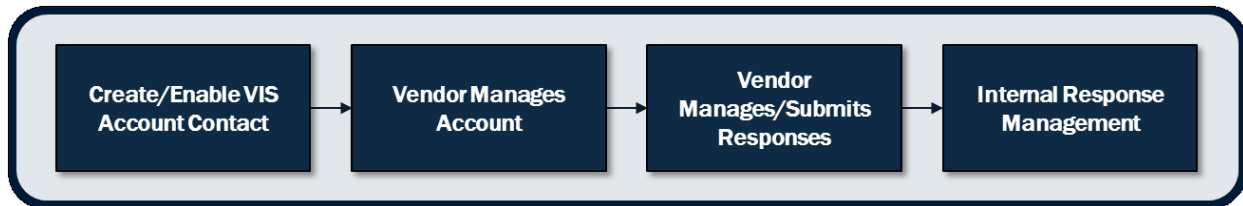
#### 1.2.1 Vendors/Potential Vendors

The BidStamp VIS portal allows any third party (prospective bidders, current vendors, past vendors) who is interested in a solicitation to submit a request to create a Contact and associate it with an overall Account record. Third parties may or may not be vendors already. There are two types of contacts that can be associated with BidStamp VIS portal accounts: contacts and primary contacts. An overview of each contact is listed below.

- **Primary Contacts** – The main contacts for a given account. By default, the first contact to request an account will receive primary contact status.
  - **If the vendor account information is not imported from a CMBL vendor profile**, the primary contact(s) associated with an account can edit overall vendor account information in addition to their own contact information.
  - The primary contact will have the ability to edit the contact information of other contacts associated with the account.
  - Primary contacts can submit questions and response materials on behalf of the account.
- **Standard Contacts** – The secondary contacts for a given account. Standard contacts must request primary accounts status from the accounts primary contact.
  - Standard contacts are only able to edit the information associated with their own account.
  - Standard contacts can submit questions and response materials on behalf of the account.

## 2 BidStamp VIS Portal Overview

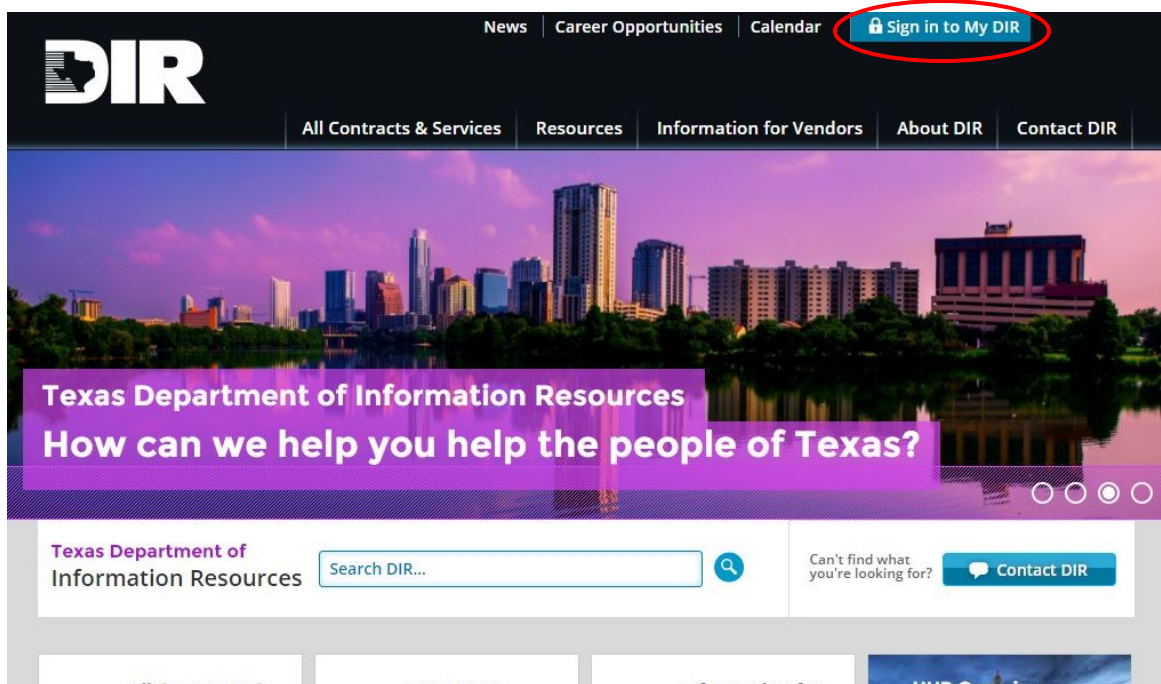
The Vendor Information System (VIS) provides interested third parties (prospective bidders, current vendors, past vendors) with the ability to create a profile that supports the key functions required during the solicitation response process. The below diagram outlines the high-level processes associated with the portal.



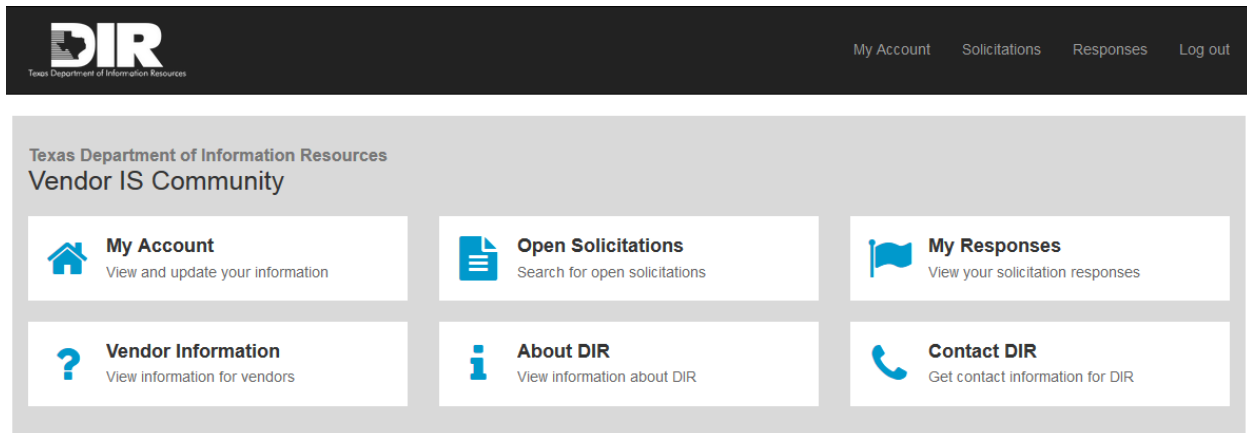
In addition to the account management and solicitation response capabilities enabled by the BidStamp VIS portal, users also can view their BidStamp response history, open solicitations, and additional information about DIR. An overview of the BidStamp VIS portal home page is detailed in the next section.

### 2.1 Home Page Navigation

Vendors will navigate to the BidStamp VIS portal log on page using this [link](#) or the DIR Application Portal accessible from DIR’s website homepage via the **Sign in to MY DIR** link. *(Please note: BidStamp VIS link via MY DIR will be available June 2017.)*



After entering your login credentials, you will be navigated to the screen below.



The BidStamp VIS Portal home page contains six tiles. Each tile serves as a button that will navigate the user to a new page. An overview of each tile is provided below.

- **My Account:** Navigates to your account detail page where you can view and update your information
- **Open Solicitations:** Navigates Vendors to a list that contains all open solicitations. From the list of open solicitations, Vendors can select an RFO number and will be taken to a detail page. The detail page allows vendors to submit a response for the RFO.
- **My Responses:** Navigates to a list that contains all of the vendor’s in-progress and previously submitted responses.
- **Vendor Information:** Navigates Vendor to a dir.texas.gov site page with additional vendor information you may find useful.
- **About DIR:** Navigates Vendor to a dir.texas.gov site page where Vendor are is able to view information about DIR.
- **Contact DIR:** Navigates Vendor to a dir.texas.gov site page that contains DIR contact information.

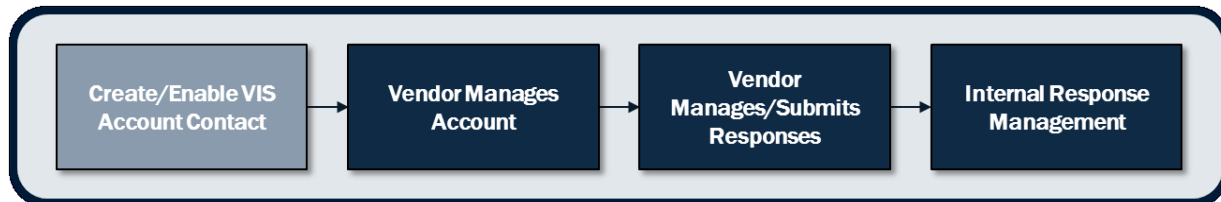
## 2.2 System Access

Below is an overview of the credentials required for Vendors. If you are a Vendor without the necessary credentials described below, please request account access via the BidStamp VIS portal sign-up page.

**Vendors/Potential Vendors** will access the BidStamp VIS Portal with their community site credentials. In order for a vendor to successfully log onto the BidStamp VIS portal, their credentials must be enabled as community user credentials by a DIR Contract Manager/System admin. This process is described in more detail in the Account Creation section below.

### 3 Account Creation

Before users can access any of the BidStamp VIS portal functionality, they will be required to provide login credentials to access a new or existing account. Each vendor account can have multiple contacts associated with it. Once a vendor account is created, the associated contact will be created and enabled in order to access the vendor account.



A brief overview of the process for creating/enabling access to vendor accounts is described below. Step by step instructions are then provided in the next section.

#### 3.1 BidStamp VIS Account Request Overview

If a vendor has an existing BidStamp VIS Login, they will access the BidStamp VIS Portal via [dir.texas.gov](http://dir.texas.gov) site and enter in their access credentials.

Alternatively, if a vendor does not yet have a BidStamp VIS login, they will request one by clicking on a “Are you a vendor and need to request an account?” button that will be located on the log on page. When this button is select, a form will load that contains the following fields; all fields on this form will be required:

**Vendor Name** – The name of the vendor account that the user is requesting access to.

**Full Name** – The name of the user requesting access.

**Contact Email Address** – The email address of the user requesting access.

**Contact Phone Number** – The phone number of the user requesting access.

**Vendor ID** – The vendor ID associated with the vendor account that the user is requesting access to.

**HUB Status** – The HUB status associated with the vendor account that the user is requesting access to.

**Solicitation Number of Interest** – The number of the solicitation the vendor is interested in responding to.

**Description** – The description of the request the vendor is submitting. For example, “Please enable my login with access to an existing vendor account.”

#### 3.2 Vendor Request Queue

After the Vendor selects the “Submit” button, the form will be routed to a Vendor Request queue for DIR’s procurement office to review. The queue will be managed on a first come first serve basis.

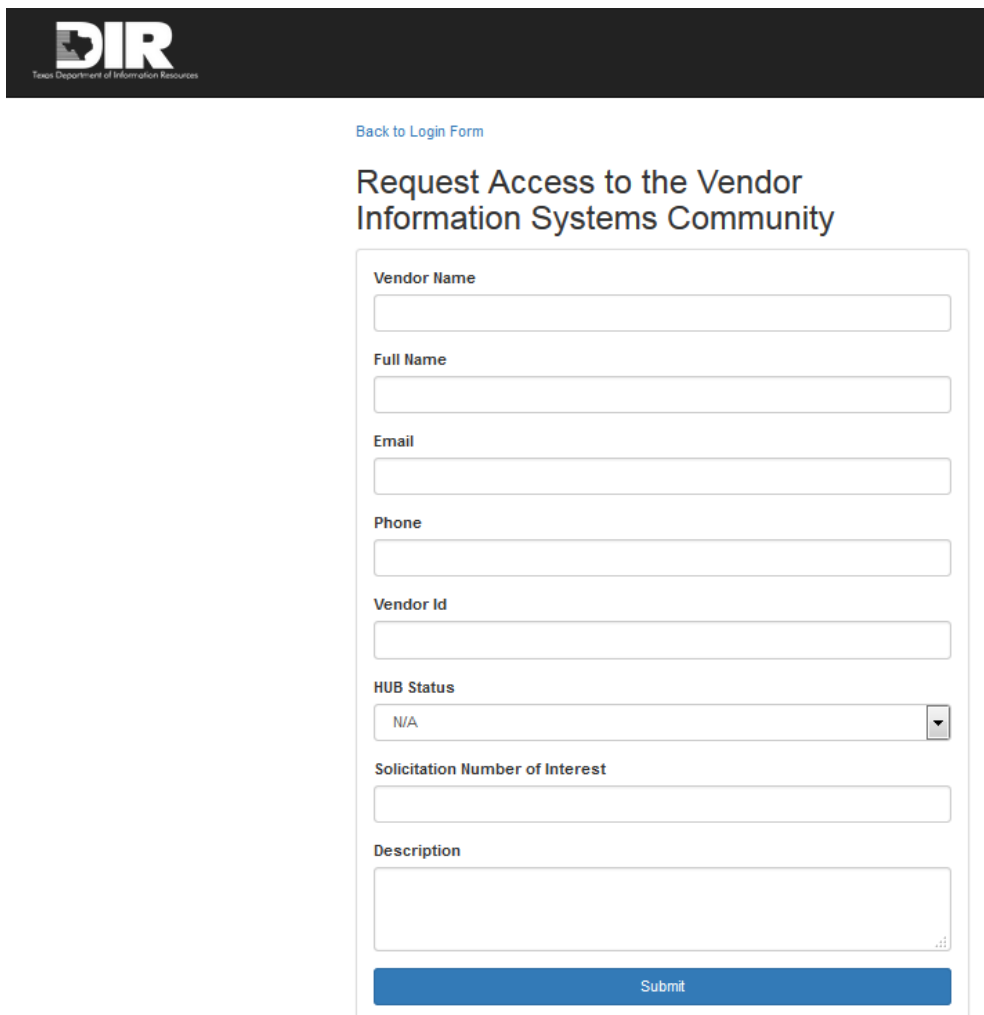
If an account for the vendor does not yet exist, the DIR will create a new vendor account and a contact with the requestor's information provided in the form submission (reference section 3.3). The contact created as the primary contact will belong to the Account Holder Entity, along with the login credentials for the vendor account.

If an account already exists, DIR will check to see if a contact for the specific user that submitted the request has been created. If a contact does not exist, a contact with the information provided in the form submission (reference section 3.3) will be created.

Once enabled as a vendor community user, the vendor contact will receive a system auto-generated email that will provide detailed instructions on how to set up the vendor account credentials.

### 3.3 BidStamp VIS Account Creation/Enabling

To create a new account or enable a contact as a community user for an existing account, follow the steps below:



The screenshot shows a web form titled "Request Access to the Vendor Information Systems Community". At the top left is the DIR logo with the text "Texas Department of Information Resources". A link "Back to Login Form" is located above the form title. The form contains the following fields:

- Vendor Name: Text input field
- Full Name: Text input field
- Email: Text input field
- Phone: Text input field
- Vendor Id: Text input field
- HUB Status: Dropdown menu with "N/A" selected
- Solicitation Number of Interest: Text input field
- Description: Text area with a "..." icon at the bottom right
- Submit: Blue button

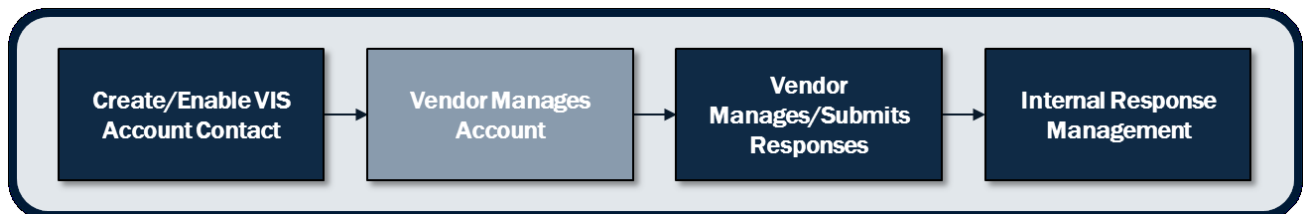
1. *Completed by the vendor contact:* Navigate to the [Request Access to the Vendor Information Systems Community](#) page.
2. Complete the request form, all fields are required, and select “Submit”.
3. The form will navigate to a confirmation message verifying the request was submitted. \*

\*The Vendor account will be enabled once DIR review is complete. Once completed, the user who submitted the request will receive a confirmation email with a link to create a password. This will officially give Vendor access to the BidStamp VIS Portal.



## 4 Vendor Account Management

After a vendor account and contact have been created, the information associated with these accounts can be updated at any time throughout the account’s lifetime. **Vendors should note that Contact information related to a DIR contract is specific to the contract and must be changed via communication/approval processes involving the DIR Contract Manager assigned to the contract.** This section 4 refers to the BidStamp VIS account management only.



**Non-CMBL vendor accounts** will be editable by the primary contact associated with the vendor’s BidStamp VIS account. If a vendor account is not imported from the CMBL, the primary contact can update certain account information through the portal’s interface. Instructions for editing the account information via the portal are included below.

### 4.1 Editing a BidStamp VIS Portal Account



#### Vendor IS Community Login

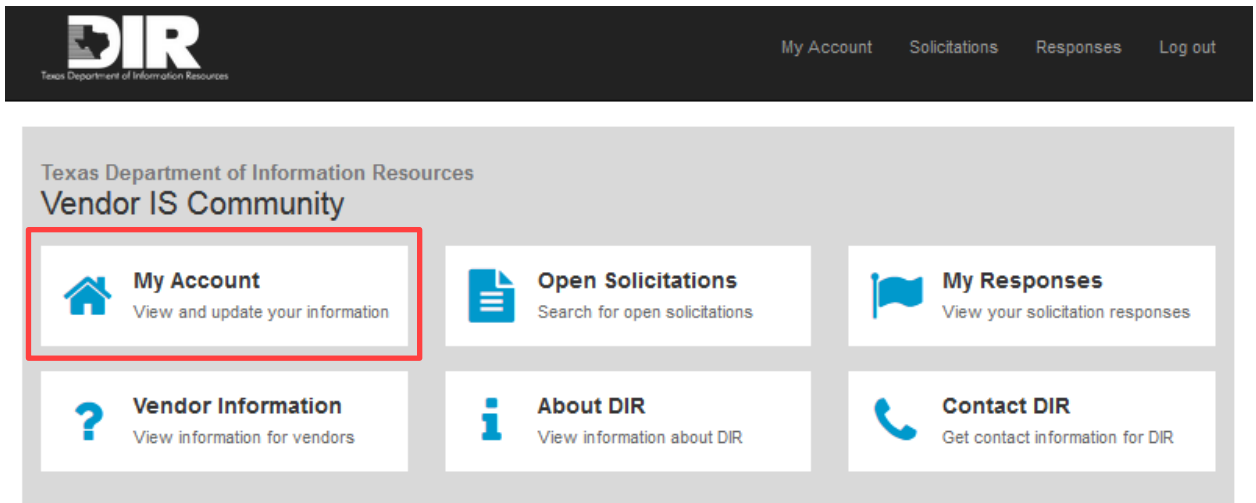
**Username**

**Password**

[Login](#)

[Are you a vendor and need to request an account?](#)  
[Forgot your password?](#)

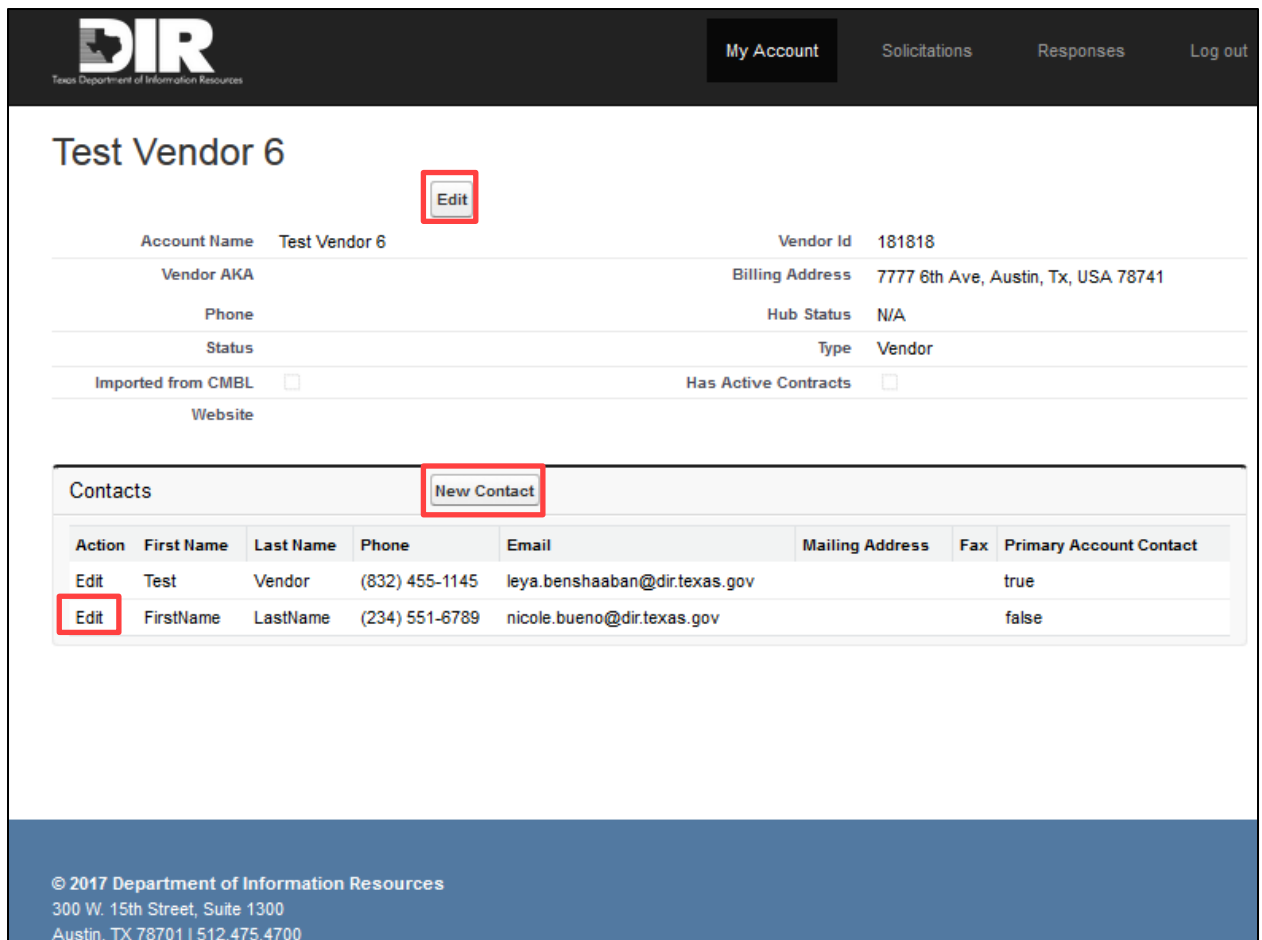
1. A primary contact will begin editing the vendor account information by logging into the BidStamp VIS Portal with their username and password. The login page can be found [here](#).



Texas Department of Information Resources  
Vendor IS Community

- My Account**  
View and update your information
- Open Solicitations**  
Search for open solicitations
- My Responses**  
View your solicitation responses
- Vendor Information**  
View information for vendors
- About DIR**  
View information about DIR
- Contact DIR**  
Get contact information for DIR

- Once logged in, the primary contact will select the “My Account” tile.



Test Vendor 6

**Edit**

Account Name	Test Vendor 6	Vendor Id	181818
Vendor AKA		Billing Address	7777 6th Ave, Austin, Tx, USA 78741
Phone		Hub Status	N/A
Status		Type	Vendor
Imported from CMBL	<input type="checkbox"/>	Has Active Contracts	<input type="checkbox"/>
Website			

**Contacts** **New Contact**

Action	First Name	Last Name	Phone	Email	Mailing Address	Fax	Primary Account Contact
<b>Edit</b>	Test	Vendor	(832) 455-1145	leya.benshaaban@dir.texas.gov			true
<b>Edit</b>	FirstName	LastName	(234) 551-6789	nicole.bueno@dir.texas.gov			false

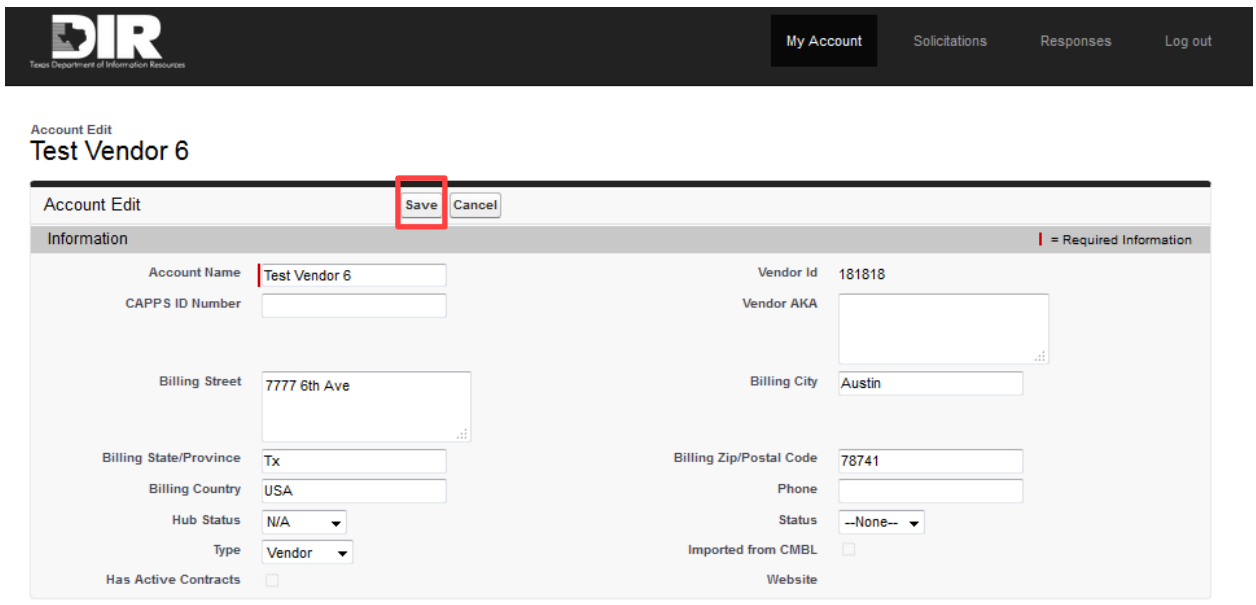
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300 W. 15th Street, Suite 1300  
Austin, TX 78701 | 512.475.4700

- The account information will load, vendor contacts’ information, and NIGP Code list may also be displayed (**CMBL vendors only**).
- There are several ways an account can be managed from this page.  
To edit the account information, **primary contacts** can select the “Edit” button.

- To add a new contact to the account, **primary contacts** can select the “New Contact” button.
- To edit an existing contact’s information, **primary contacts** can select the “Edit” button next to the contact’s first name.
- To edit their own contact information, **any contact** can select the “Edit” button next to their own first name.

Instructions for each feature are included in the sections below.

### 4.1.1 Edit Vendor Account Information



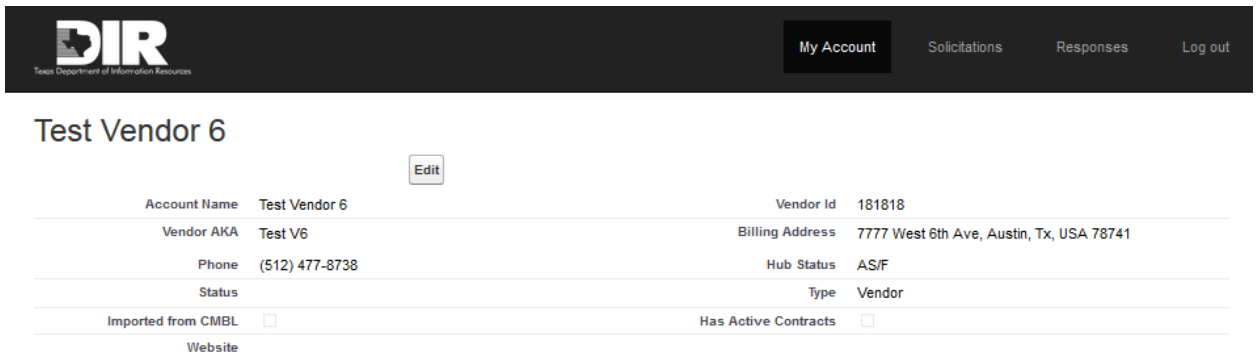
Account Edit  
Test Vendor 6

Account Edit Save Cancel

Information ! = Required Information

Account Name	<input type="text" value="Test Vendor 6"/>	Vendor Id	181818
CAPPS ID Number	<input type="text"/>	Vendor AKA	<input type="text"/>
Billing Street	<input type="text" value="7777 6th Ave"/>	Billing City	<input type="text" value="Austin"/>
Billing State/Province	<input type="text" value="Tx"/>	Billing Zip/Postal Code	<input type="text" value="78741"/>
Billing Country	<input type="text" value="USA"/>	Phone	<input type="text"/>
Hub Status	<input type="text" value="N/A"/>	Status	<input type="text" value="--None--"/>
Type	<input type="text" value="Vendor"/>	Imported from CMBL	<input type="checkbox"/>
Has Active Contracts	<input type="checkbox"/>	Website	<input type="text"/>

1. After selecting the “Edit” button, primary contacts associated with a Non-CMBL vendor account will have the ability to edit certain information on the vendor’s account.
2. The primary contact can then make updates to any of the fields that are editable. Note certain fields (Vendor ID, Imported from CMBL, Has Active Contracts, etc.) will be read-only. These are updated automatically through Salesforce and vendor contacts will not be able to make changes.
3. Selecting the “Save” button will save any changes the primary contact made to the record.



My Account Solicitations Responses Log out

Test Vendor 6

Account Name	Test Vendor 6	Vendor Id	181818
Vendor AKA	Test V6	Billing Address	7777 West 6th Ave, Austin, Tx, USA 78741
Phone	(512) 477-8738	Hub Status	AS/F
Status		Type	Vendor
Imported from CMBL	<input type="checkbox"/>	Has Active Contracts	<input type="checkbox"/>
Website			

4. The new information should now be displayed on the “My Account” page.

### 4.1.2 Create/Update Contact

Contact Edit  
New Contact

1. After selecting the “New Contact” button, a page will load that displays the “Contact Edit” form.
2. Enter the standard contact information (First name, last name, address, phone, etc.)
3. If the primary contact would like to assign the next contact as an additional primary contact, they can select the “Primary Account Contact” checkbox.  
This will grant the new contact account editing permissions and sign them up for receiving notifications/communications for an account.
4. The “Receive Notifications” checkbox will enable a contact to receive notifications for any solicitation the contact subscribes to.  
This will not give the contact the rights of a primary contact (permission to edit the account information/create new contacts).
5. When the primary contact has completed the contact information form, they can select “Save” to add the new record to their vendor account.

**Test Vendor 6** [Edit](#)

Account Name	Test Vendor 6	Vendor Id	181818
Vendor AKA	Test V6	Billing Address	7777 West 6th Ave, Austin, Tx, USA 78741
Phone	(512) 477-8738	Hub Status	AS/F
Status		Type	Vendor
Imported from CMBL	<input type="checkbox"/>	Has Active Contracts	<input type="checkbox"/>
Website			

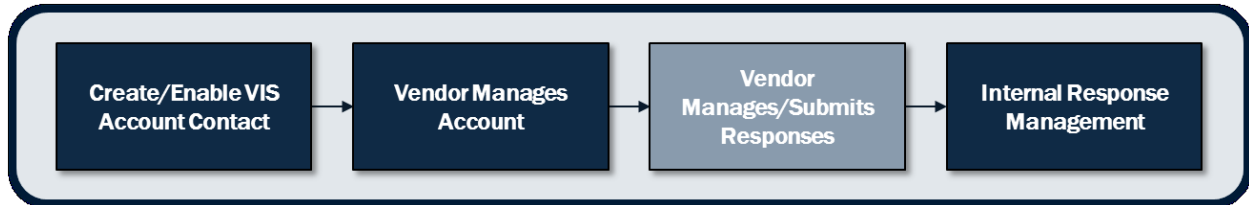
**Contacts** [New Contact](#)

Action	First Name	Last Name	Phone	Email	Mailing Address	Fax	Primary Account Contact
<a href="#">Edit</a>	Test	Vendor	(832) 455-1145	leya.benshaaban@dir.texas.gov			true
<a href="#">Edit</a>	New	Testing					true
<a href="#">Edit</a>	FirstName	LastName	(234) 551-6789	nicole.bueno@dir.texas.gov			false

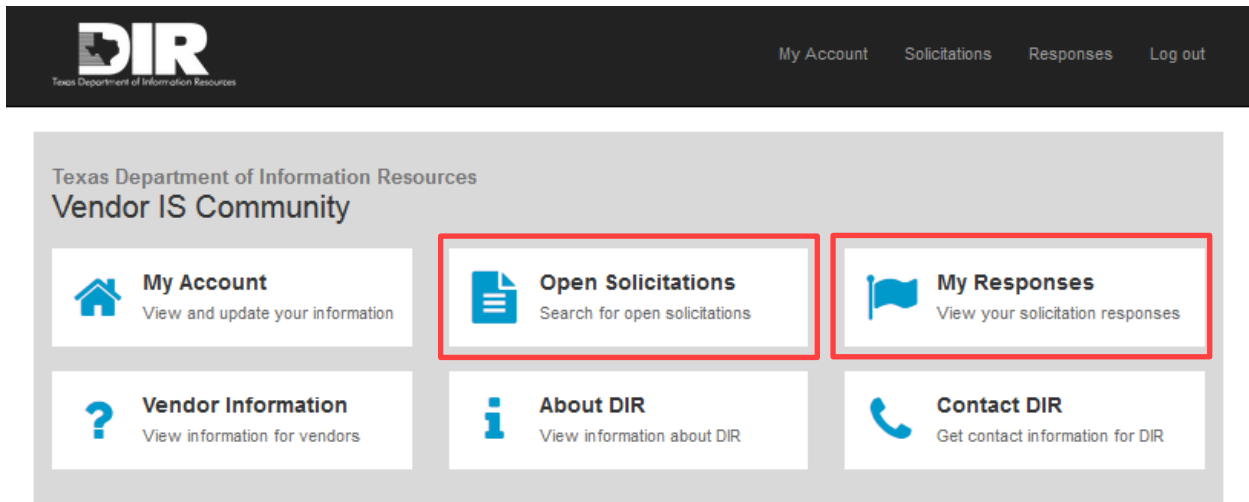
6. The new contact will now be added to the “Contacts” section of the page.
7. To edit a specific contact’s existing information, select the “Edit” button next to their name. The “Contact Edit” form for the selected contact will be displayed. Contacts can be edited in the same manner that they are created.

## 5 Vendor Response Management

The primary purpose of the BidStamp VIS portal is to enable users to interact with DIR Solicitations and submit responses. After a user’s account has been enabled, they will be able to submit and manage their responses from the BidStamp VIS portal.



Users will be able to access a listing of open solicitations and a listing of their vendor’s in-progress and previously submitted responses. Users have the option to create a new response for any solicitation on the “Open Solicitations” page, or manage an existing response from their “My Responses” page.



**Any vendor contact can submit a response on behalf of their vendor account.** Through BidStamp VIS portal, vendors will be able to submit the following components of a solicitation response:

- Response documents
- Automated HUB Subcontracting Plan (HSP) form
- Automated pricing form
- Reference email addresses
- Questions related to the solicitation

Instructions for submitting each response component is detailed in the sections below.

### 5.1 Creating a New Response

To create a new response, log in to the BidStamp VIS portal and select the “Open Solicitations” tile (pictured in the section above). This will display the list of all solicitations whose current phase is either “Posting” or “RFI – Posted” (DIR may post a Request for Information (RFI) when necessary.).



[My Account](#)
[Solicitations](#)
[Responses](#)
[Log out](#)

## All Open Solicitations

RFO Number *	RFO Description	Solicitation Status	Phase	Type	Date/Time Respo...	Question Submi...
<a href="#">DIR-TSO-TMP-266</a>	testMadan	Posted	RFI - Posted	Cooperative	5/24/2017 9:18 AM	4/30/2017 9:18 AM
<a href="#">DIR-TSO-TMP-267</a>	test	Posted	Posting	Cooperative	11/8/2017 9:49 AM	1/9/2017 6:13 AM
<a href="#">DIR-TSO-TMP-293</a>	Request for Widg...	Posted	Posting	Cooperative	3/31/2017 10:24 AM	3/15/2017 9:52 PM
<a href="#">DIR-TSO-TMP-295</a>	Test RFO Title	Draft	Posting	Cooperative	3/31/2017 2:11 PM	3/13/2017 2:13 PM
<a href="#">DIR-TSO-TMP-296</a>	Dell-branded Prod...	Posted	Posting	Cooperative	4/30/2017 1:47 PM	3/17/2017 10:01 AM
<a href="#">DIR-TSO-TMP-297</a>	RFO		Posting	Cooperative	3/15/2018 6:32 AM	

1. Click on the “RFO Number” of the solicitation you would like to respond to.



[My Account](#)
[Solicitations](#)
[Responses](#)
[Log out](#)

### RFO Number DIR-TSO-TMP-295

#### RFO Number Detail

- [Respond To Solicitation](#)
[Ask A Question](#)
[Subscribe to Solicitation](#)
[View Solicitation Documents](#)

Actual Start Date Posting	3/6/2017	Vendor Conference Date	3/6/2017 2:13 PM
Question Submission Deadline Date	3/21/2017 11:48 AM	RFO Answers to Questions Deadline Date	3/25/2017 2:13 PM
Date/Time Responses Due	3/31/2017 2:11 PM	Actual Start Date Evaluation	

#### New Fields

Solicitation Status	Draft	Type	Cooperative
---------------------	-------	------	-------------

#### RFO Questions

No records to display

2. You will be navigated to the “RFO Number” detail page for a given solicitation. This page will display important deadlines for the solicitation and list any questions you have submitted. From the buttons on this page, you can:
  - **Respond to a Solicitation (or View Response):** Create a new response or view a response that is in-progress.
    - If a response has already been created, this button will read as “**View Response**” and allow you to resume your progress on an existing RFO response.

- **Ask A Question:** Submit a question to be reviewed by a DIR resource. Questions can be submitted up until the “Question Submission Deadline date” indicated in the RFO document and on the detail page.
- **Subscribe to Solicitation:** Subscribe to a solicitation if you would like to receive addendum notifications.
  - To subscribe to the solicitation, you must select the “Subscribe to Solicitation” button AND have enabled your contact to [“Receive Notifications”](#).
- **View Solicitation Documents:** Navigate to the ESDB posting for a solicitation and view the solicitation’s documents.

3. Click the “Respond to Solicitation” button to begin your solicitation response.

RFO Response  
R0005793

*(Informational messages are present in the original image)*

RFO Response Detail

RFO Number	DIR-TSO-TMP-295	Status	In Progress
Submission Date		Vendor	Test Vendor 6
Submitted By		Actual Start Date Posting	3/6/2017
Vendor Conference Date	3/6/2017 2:13 PM	Question Submission Deadline Date	3/21/2017 11:48 AM
RFO Answers to Questions Deadline Date	3/25/2017 2:13 PM	Date/Time Responses Due	3/31/2017 2:11 PM
Actual Start Date Evaluation	3/31/2017		

RFO Response Documents New

No records to display

*(Informational message: Reference forms are being sent via BidStamp as a courtesy. DIR will not be responsible if the form is not received by the vendor for any reason. It is solely the vendor's responsibility to ensure that the reference party receives the request.)*

Vendor References New

No records to display

4. The “RFO Response” page will load. From the buttons on this page, you can:

- **Delete:** Delete all information that has been uploaded and the response record before the response has been submitted. Once a response has been submitted, a user will need to use the **Withdraw** button that will appear upon solicitation submission.



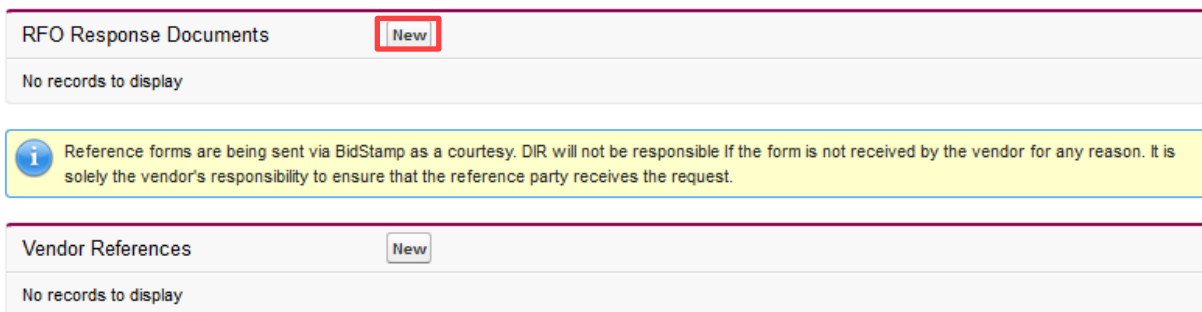
- **Submit:** Submits the response record and all associated information. Once submitted, a user can withdraw a submission up until the “Date/Time Responses Due” (indicated on the “RFO Response” and “RFO Number” detail pages) has arrived.
- **Create Pricing Form:** Create a pricing form to submit pricing information for your response.
- **Ask A Question:** Submit a question to be reviewed by a DIR resource. Questions can be submitted up until the “Question Submission Deadline date” indicated in the RFO document and on the detail page.
- **Add (or Edit) HUB Subcontracting Form:** Complete an automated version of the HSP form online and submit the form as part of your response. If you have started an HSP form already, this button will read “Edit HUB Subcontracting form” - here, you can resume your progress on the HSP form.
- **New** (RFO Response Documents section of the page): Submit a new file as part of your solicitation response. **Required documents are indicated in the RFO posting on ESBD**
- **New** (Vendor References Section of the page): Submit a new reference’s email address and opt to send the vendor a reference form when ready.

You are now ready to begin completing the components of your response. Response documents and forms can be completed in any order, but **the “Submit” button must be selected before the “Date/Time Responses Due” in order for the response to be taken into consideration.** The “Submit” button will be removed when the “Date/Time Responses Due” arrives.

The next sections will describe the process for submitting response documents, reference emails, the HSP form, and pricing form.

## 5.2 Upload RFO Response Documents

The documents required for an RFO response will be indicated in the original ESBD posting. To upload the documents specified by DIR, use the following steps:



The screenshot shows two sections of the BidStamp interface. The top section is titled "RFO Response Documents" and contains a "New" button highlighted with a red box. Below this section is a message box with an information icon and the text: "Reference forms are being sent via BidStamp as a courtesy. DIR will not be responsible if the form is not received by the vendor for any reason. It is solely the vendor's responsibility to ensure that the reference party receives the request." The bottom section is titled "Vendor References" and contains a "New" button.

1. Select the "New" button on the RFO Response Documents section.

RFO Response Detail Delete Submit Ask A Question Add HUB Subcontracting Form

RFO Number	DIR-TSO-TMP-295	Status	In Progress
Submission Date		Vendor	Test Vendor 6
Submitted By		Actual Start Date Posting	3/6/2017
Vendor Conference Date	3/6/2017 2:13 PM	Question Submission Deadline Date	3/21/2017 11:48 AM
RFO Answers to Questions Deadline Date	3/25/2017 2:13 PM	Date/Time Responses Due	3/31/2017 2:11 PM
Actual Start Date Evaluation			

New Response Document

Name

Document Type

Redacted

File  No file selected.

- A form will load in the Response Documents section of the page. This form will allow you to add a new response document.
- Enter the following information in their respective fields: document name, document type, and select the redacted checkbox if applicable.
- Select the "Browse" button. Your computer's standard file upload window will open. From the file upload window: Select a response file (under 400 MB) you would like to upload and click the "Open" button.
- The file upload window will close and the file name should now appear on the screen next to the "Browse" button.
- Select the "Save" button.

**Success:**  
Document Successfully Added!

RFO Response Documents New

Action	Name	Document Type	Redacted	Last Modified Date
Del	Test Document	Vendor Information Form (Exhibit A)	✓	3/14/2017 12:32 PM

- When the upload is complete, you will receive a success message and your document will be included in the "RFO Response Documents" list.
- Repeat this process as needed until all necessary documents have been uploaded.

### 5.3 Send Vendor Reference Emails

If a solicitation requires vendors to provide references, the "Vendor References" section of the response record will allow a user to indicate the contact information of their references. Once they have indicated these email addresses, a user can also send out a reference form directly from the response record. Instructions for sending the reference email are included below.

RFO Response Documents New

No records to display

*Reference forms are being sent via BidStamp as a courtesy. DIR will not be responsible if the form is not received by the vendor for any reason. It is solely the vendor's responsibility to ensure that the reference party receives the request.*

Vendor References New

No records to display

1. Select the "New" button on the "Vendor References" section of the page.

Vendor References New

New Response Reference

Email

Save Cancel

2. The "New Response Reference" form will load. Enter your references email address.
3. Select the "Save" button.

Vendor References New Send Reference Form

Email	Sent On
<input checked="" type="checkbox"/> leyla.benshaaban@dir.texas.gov	

4. The reference email and a checkbox field will now be displayed in the "Vendor References" list.
5. Select the checkbox next to the reference(s) you would like to send a reference form to.
6. Select the "Send Reference Form" button.

Note: Doing so will send a copy of the reference email and reference form to yourself and the indicated vendor. It is recommended you reach out to the reference before to notify them that they will be receiving an email from DIR with a reference form attached.

Vendor References New Send Reference Form

Email	Sent On
<input type="checkbox"/> leyla.benshaaban@dir.texas.gov	3/14/2017 12:43 PM


7. The page will reload. In the "Vendor References" list, the "Sent On" date will indicate the reference has been sent the email.


### 5.4 Add an HSP Form

If the solicitation requires you to submit an HSP form with your response, this can be completed electronically via the BidStamp VIS portal. Once the form is completed, the last step will guide you through the process for printing and saving the form to your computer. The saved form can then be uploaded as a response document using the document upload instructions detailed above.

Instructions for how to complete the HSP form are below. These instructions will describe the method for accessing the form’s instructions, entering data, and submitting the form. Specific instructions as to *how* the form should be filled out are dependent on a vendor’s subcontracting opportunities and can vary. These instructions are indicated on the form itself and should be reviewed thoroughly before completing an HSP form submission.

RFO Response  
R0005793


 Add your documents below (400MB max size). Click the "Submit" button once all documents have been added.

 Please review the ESBID posting to ensure you have provided all the necessary documents in your submission.  
Also, please verify the information on the page is correct before submitting. Once submitting your response, you will be unable to make changes unless you withdraw your response completely and restart the submission process.

RFO Response Detail [Delete](#) [Submit](#) [Ask A Question](#) [Create Pricing Form](#) [Edit HUB Subcontracting Form](#)

RFO Number	DIR-TSO-TMP-295	Status	In Progress
Submission Date		Vendor	Test Vendor 6
Submitted By		Actual Start Date Posting	3/6/2017
Vendor Conference Date	3/6/2017 2:13 PM	Question Submission Deadline Date	3/21/2017 11:48 AM
RFO Answers to Questions Deadline Date	3/25/2017 2:13 PM	Date/Time Responses Due	3/31/2017 2:11 PM
Actual Start Date Evaluation	3/31/2017		

1. Select the “Add/Edit HUB Subcontracting Form” button.



[My Account](#)   [Solicitations](#)   [Responses](#)   [Log out](#)

## HUB Subcontracting Plan (HSP)

- While this HSP Quick Checklist is being provided to merely assist you in readily identifying the sections of the HSP form that you will need to complete, it is very important that you adhere to the instructions in the HSP form and instructions provided by the contracting agency.
  - Section 1 - Respondent and Requisition Information
  - Section 2 a. - Yes, I will be subcontracting portions of the contract.
  - Section 2 b. - List all the portions of work you will subcontract, and indicate the percentage of the contract you expect to award to Texas certified HUB vendors.
  - Section 2 c. - Yes
  - Section 4 - Affirmation
  - GFE Method A (Attachment A) - Complete an Attachment A for each of the subcontracting opportunities you listed in Section 2 b.
- If you will be subcontracting any portion of the contract to Texas certified HUB vendors and Non-HUB vendors, and the aggregate percentage of all the subcontracting work you will be awarding to the Texas certified HUB vendors with which you do not have a continuous contract\* in place for more than five (5) years meets or exceeds the HUB Goal the contracting agency identified in the "Agency Special Instructions/Additional Requirements", complete:
  - Section 1 - Respondent and Requisition Information
  - Section 2 a. - Yes, I will be subcontracting portions of the contract.
  - Section 2 b. - List all the portions of work you will subcontract, and indicate the percentage of the contract you expect to award to Texas certified HUB vendors and Non-HUB vendors.
  - Section 2 c. - No
  - Section 2 d. - Yes
  - Section 4 - Affirmation
  - GFE Method A (Attachment A) - Complete an Attachment A for each of the subcontracting opportunities you listed in Section 2 b.
- If you will be subcontracting any portion of the contract to Texas certified HUB vendors and Non-HUB vendors or only to Non-HUB vendors, and the aggregate percentage of all the subcontracting work you will be awarding to the Texas certified HUB vendors with which you do not have a continuous contract\* in place for more than five (5) years does not meet or exceed the HUB Goal the contracting agency identified in the "Agency Special Instructions/Additional Requirements", complete:
  - Section 1 - Respondent and Requisition Information
  - Section 2 a. - Yes, I will be subcontracting portions of the contract.
  - Section 2 b. - List all the portions of work you will subcontract, and indicate the percentage of the contract you expect to award to Texas certified HUB vendors and Non-HUB vendors.
  - Section 2 c. - No
  - Section 2 d. - No
  - Section 4 - Affirmation
  - GFE Method B (Attachment B) - Complete an Attachment B for each of the subcontracting opportunities you listed in Section 2 b.
- If you will not be subcontracting any portion of the contract and will be fulfilling the entire contract with your own resources (i.e., employees, supplies, materials and/or equipment), complete:
  - Section 1 - Respondent and Requisition Information
  - Section 2 a. - No, I will not be subcontracting any portion of the contract, and I will be fulfilling the entire contract with my own resources.
  - Section 3 - Self Performing Justification
  - Section 4 - Affirmation

- The HSP form will load. Instructions for completing the form are displayed first. Read these instructions to determine which sections of the form you will need to complete.

Section 1 - Respondent and Requisition Information

[Edit](#)   [Continue To Section 2](#)

---

a.

Respondent (Company) Name	Test Vendor 6	State of Texas VID	181818
Point of Contact	Test Vendor	Phone #	(832) 455-1145
Email Address	leya.benshaaban@dir.texas.gov	Fax #	

---

b.

Is your company a Texas Certified HUB?

---

c.

Requisition	DIR-TSO-TMP-295	Bid Open Date	03/06/2017
-------------	-----------------	---------------	------------

- Section one will appear beneath the instructions. If applicable, fill out section one of the form.

The respondent contact information will be pre-populated based on your BidStamp VIS portal information.

**Section 1 - Respondent and Requisition Information** Save Cancel

**a.**

Respondent (Company) Name: Test Vendor 6      State of Texas VID: 181818

Point of Contact: Test Vendor      Phone #: (832) 455-1145

Email Address: leya.benshaaban@dir.texas.gov      Fax #:

**b.**

Is your company a Texas Certified HUB?

**c.**

RFO Number: DIR-TSO-TMP-295      Bid Open Date: 3/6/2017

- If you would like to make changes to section one, select the “Edit” button. When you have finished making changes, select “Save” and then “Continue to Section 2”.

**Section 2 - Respondent's Subcontracting Intentions** Save Cancel

**a.**

Will you be subcontracting portions of the contract?

- Section two will appear beneath section one. If applicable, complete section two by selecting the “Edit” button. Sub-section “a” will appear editable. Selecting the checkbox will expand the form.

**a.**

Will you be subcontracting portions of the contract?

**b.**

List all the portions of work (subcontracting opportunities) you will subcontract. Also, based on the total value of the contract, identify the percentages of the contract you expect to award to Texas certified HUBs, and the percentage of the contract you expect to award to vendors that are not a Texas certified HUB (i.e., Non-HUB). New

**Subcontracting Opportunities**

Action	Description	Percentage of the contract expected to be subcontracted to HUBs with which you do not have a continuous contracts in place for less than five(5) years	Percentage of the contract expected to be subcontracted to HUBs with which you do not have a continuous contracts in place for more than five(5) years	Percentage of the contract expected to be subcontracted to non-HUBs with which you do not have a continuous contracts in place for five(5) years

**c.**

I will be using only Texas Certified HUBs to perform all subcontracting opportunities

**d.**

Check the box if the aggregate expected percentage of the contract you will subcontract with Texas certified HUBs with which you do not have a continuous contract\* in place with for more than five(5) years, meets or exceeds the HUB goal the contracting agency identified in the Agency Special Instructions/Additional Requirements.

- If applicable, complete the additional components of section two. To enter a new subcontracting opportunity, select the “New” button in sub-section “b”.

b.

List all the portions of work (subcontracting opportunities) you will subcontract. Also, based on the total value of the contract, identify the percentages of the contract you expect to award to Texas certified HUBs, and the percentage of the contract you expect to award to vendors that are not a Texas certified HUB (i.e., Non-HUB).

Subcontracting Opportunities New

Action	Description	Percentage of the contract expected to be subcontracted to HUBs with which you do not have a continuous contracts in place for less than five(5) years	Percentage of the contract expected to be subcontracted to HUBs with which you do not have a continuous contracts in place for more than five(5) years	Percentage of the contract expected to be subcontracted to non-HUBs with which you do not have a continuous contracts in place for five(5) years
Remove	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- The “Subcontracting Opportunities” list will display a new blank list entry for you to populate. Enter the relevant information.
- Select “New” again if you would like to add an additional opportunity. If not, continue filling out sub-sections c-d and then select the “Save” button. The form will automatically determine your next steps based on the information you have provided.

b.


List all the portions of work (subcontracting opportunities) you will subcontract. Also, based on the total value of the contract, identify the percentages of the contract you expect to award to Texas certified HUBs, and the percentage of the contract you expect to award to vendors that are not a Texas certified HUB (i.e., Non-HUB).

Subcontracting Opportunities

Description	Percentage of the contract expected to be subcontracted to HUBs with which you do not have a continuous contracts in place for less than five(5) years	Percentage of the contract expected to be subcontracted to HUBs with which you do not have a continuous contracts in place for more than five(5) years	Percentage of the contract expected to be subcontracted to non-HUBs with which you do not have a continuous contracts in place for five(5) years
New Test Opportunity 1	50.00%	30.00%	20.00%

[Complete HSP Good Faith Effort - Method A \(Attachment A\) forms for each Subcontracting Opportunity](#)

- Selecting “Save” will prompt the user to fill out either Method A or Method B, dependent on the information provided. Beneath the “Subcontracting Opportunities”, a link will be provided that navigates the user to the applicable method.
- Click the link to fill out a method for each subcontracting opportunity provided.



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- Subcontracting Opportunity 1 (New Test Opportunity 1)
- Subcontracting Opportunity 2 (New Test Opportunity 2)

- You will be navigated to another form page. Here, each subcontracting opportunity is displayed. Click on an opportunity to complete its method form.

[Back to HSP Form](#)**Subcontracting Opportunity 1 (New Test Opportunity 1)****HSP Good Faith Effort - Method A (Attachment A)**

Company Name	Requisition #
Test Vendor 6	DIR-TSO-TMP-295

IMPORTANT: If you responded "Yes" to SECTION 2, Items c or d of the completed HSP form, you must submit a completed "HSP Good Faith Effort-Method A(Attachment A)" for each of the subcontracting opportunities you listed in SECTION 2, Item b of the completed HSP form.

**Section A-1 - Subcontracting Opportunity****Description**

New Test Opportunity 1

**Section A-2 - Subcontracting Selection**

List the subcontractor(s) you selected to perform the subcontracting opportunity you listed above in Section A-1. Also identify whether they are a Texas certified HUB and their Texas Vendor Identification (VID) Number or federal Employer Identification, the approximate dollar value of the work to be subcontracted, and the expected percentage of work to be subcontracted. When searching for Texas certified HUBs and verifying their HUB status ensure that you use the State of Texas' Centralized Master Bidders List(CMBL) - Historically Underutilized Business (HUB) Directory Search located at <http://mycpa.cpa.state.tx.us/tpasscmbsearch/index.jsp>. HUB status code "A" signifies that the company is a Texas certified HUB.

**No Subcontractor Record Exists.**

REMINDER: As specified in SECTION 4 of the completed HSP form, if you (respondent) are awarded any portion of the requisition, you are required to provide notice as soon as practical to all the subcontractors(HUBs and Non-HUBs) of their selection as a subcontractor. The notice must specify at a minimum the contracting agency's name and its point of contact for the contract award number, the subcontracting opportunity they(the subcontractor) will perform, the approximate dollar value of the subcontracting opportunity and the expected percentage of the total contract that the subcontracting opportunity represents. A copy of the notice required by the section must also be provided to the contracting agency's point of contact for the contract no later than ten(10) working days after the contract is awarded.

**Subcontracting Opportunity 2 (New Test Opportunity 2)**

12. The method form will expand. Review the instructions and select the "New" button to add a new subcontractor record.



New Opportunity Subcontractor

## Opportunity Subcontractor Edit

Opportunity Subcontractor Edit Save Cancel

Information | = Required Information

Subcontracting Opportunity	<input type="text" value="SO-0044"/>
Company Name	<input type="text"/>
TX Certified Hub	<input type="checkbox"/>
TX VID or EIN	<input type="text"/>
Type	Subcontractor ▾
Approximate Dollar Amount	<input type="text"/>
Expected Percentage of Contract	<input type="text"/>

Save Cancel

13. You will be redirected to the “New Opportunity Subcontractor” form. The Subcontracting Opportunity field will be auto populated with a unique ID. Enter any additional required fields and any other known information.
14. Select “Save” once you are done.

Subcontracting Opportunity 1 (New Test Opportunity 1)

HSP Good Faith Effort - Method A (Attachment A)

<b>Company Name</b> Test Vendor 6	<b>Requisition #</b> DIR-TSO-TMP-295
--------------------------------------	---

IMPORTANT: If you responded "Yes" to SECTION 2, Items c or d of the completed HSP form, you must submit a completed "HSP Good Faith Effort-Method A(Attachment A)" for each of the subcontracting opportunities you listed in SECTION 2, Item b of the completed HSP form.

Section A-1 - Subcontracting Opportunity

Description  
New Test Opportunity 1

Section A-2 - Subcontracting Selection

List the subcontractor(s) you selected to perform the subcontracting opportunity you listed above in Section A-1. Also identify whether they are a Texas certified HUB and their Texas Vendor Identification (VID) Number or federal Employer Identification, the approximate dollar value of the work to be subcontracted, and the expected percentage of work to be subcontracted. When searching for Texas certified HUBs and verifying their HUB status ensure that you use the State of Texas' Centralized Master Bidders List(CMBL) - Historically Underutilized Business (HUB) Directory Search located at <http://mycpa.cpa.state.tx.us/tpasscmbsearch/index.jsp>. HUB status code "A" signifies that the company is a Texas certified HUB.

New

	Company Name	TX Certified Hub	TX VID or EIN	Type	Approximate Dollar Amount	Expected Percentage of Contract
<a href="#">Edit</a>   <a href="#">Del</a>	New Subcontractor	<input type="checkbox"/>		Subcontractor		

15. You will be redirected back to the collapsed listing of all subcontracting opportunities. Selecting the subcontracting opportunity you were working with, will redisplay its method form. The subcontractor entered in the previous steps should now be displayed in section "A-2".
16. Repeat this process for all subcontractors expected to perform the opportunity using the "New" button.

Back to HSP Form

▸ Subcontracting Opportunity 1 (New Test Opportunity 1)

▾ Subcontracting Opportunity 2 (New Test Opportunity 2)

### HSP Good Faith Effort - Method A (Attachment A)

<b>Company Name</b> Test Vendor 6	<b>Requisition #</b> DIR-TSO-TMP-295
--------------------------------------	---

IMPORTANT: If you responded "Yes" to SECTION 2, Items c or d of the completed HSP form, you must submit a completed "HSP Good Faith Effort-Method A(Attachment A)" for each of the subcontracting opportunities you listed in SECTION 2, Item b of the completed HSP form.

**Section A-1 - Subcontracting Opportunity**  
**Description**  
 New Test Opportunity 2

**Section A-2 - Subcontracting Selection**  
 List the subcontractor(s) you selected to perform the subcontracting opportunity you listed above in Section A-1. Also Identify whether they are a Texas certified HUB and their Texas Vendor Identification (VID) Number or federal Employer Identification, the approximate dollar value of the work to be subcontracted, and the expected percentage of work to be subcontracted. When searching for Texas certified HUBs and verifying their HUB status ensure that you use the State of Texas' Centralized Master Bidders List(CMBL) - Historically Underutilized Business (HUB) Directory Search located at <http://mycpa.opa.state.tx.us/tpasscmblsearch/index.jsp>. HUB status code "A" signifies that the company is a Texas certified HUB.

New

**No Subcontractor Record Exists.**

REMINDER: As specified in SECTION 4 of the completed HSP form, if you (respondent) are awarded any portion of the requisition, you are required to provide notice as soon as practical to all the subcontractors(HUBs and Non-HUBs) of their selection as a subcontractor. The notice must specify at a minimum the contracting agency's name and its point of contact for the contract award number, the subcontracting opportunity they(the subcontractor) will perform, the approximate dollar value of the subcontracting opportunity and the expected percentage of the total contract that the subcontracting opportunity represents. A copy of the notice required by the section must also be provided to the contracting agency's point of contact for the contract no later than ten(10) working days after the contract is awarded.

17. When you have completed the first subcontracting opportunities method form, scroll down the page and expand the next subcontracting opportunity's method form
18. Repeat the process described in steps 12-17 until you have completed a method for each subcontracting opportunity. Select the "Back to HSP form" button when you are finished. You will be navigated back to the HSP form.

Section 2 - Respondent's Subcontracting Intentions Back Edit **Continue To Section 3**

**a.**

Will you be subcontracting portions of the contract? If yes check this box.

**b.**

List all the portions of work (subcontracting opportunities) you will subcontract. Also, based on the total value of the contract, identify the percentages of the contract you expect to award to Texas certified HUBs, and the percentage of the contract you expect to award to vendors that are not a Texas certified HUB (i.e., Non-HUB).

**Subcontracting Opportunities**

Description	Percentage of the contract expected to be subcontracted to HUBs with which you do not have a continuous contracts in place for less than five(5) years	Percentage of the contract expected to be subcontracted to HUBs with which you do not have a continuous contracts in place for more than five(5) years	Percentage of the contract expected to be subcontracted to non-HUBs with which you do not have a continuous contracts in place for five(5) years
New Test Opportunity 1	50.00%	30.00%	20.00%
New Test Opportunity 2	50.00%	20.00%	30.00%

Complete HSP Good Faith Effort - Method A (Attachment A) forms for each Subcontracting Opportunity

**c.**

I will be using only Texas Certified HUBs to perform all subcontracting opportunities

- Return to section two of the form. Ensure the remaining sections are complete (if applicable) and then select the "Continue to Section 3" button.

Section 3 - Self Performing Justification Back Edit **Continue To Section 4**

If you responded "No" to SECTION 2, Item a, in the space provided below explain how your company will perform the entire contract with its own employees, supplies, materials and/or equipment.

Self Performing Justification

- If applicable, complete section three by selecting the "Edit" button. If not applicable, select the "Continue to Section 4" button.

Section 4 - Affirmation Back **Print**

As evidenced by my signature below, I affirm that I am an authorized representative of the respondent listed in SECTION 1, and that the information and supporting documentation submitted with the HSP is true and correct. Respondent understands and agrees that, if awarded any portion of the requisition:

- The respondent will provide notice as soon as practical to all the subcontractors (HUBs and Non-HUBs) of their selection as a subcontractor for the awarded contract. The notice must specify at a minimum the contracting agency's name and its point of contact for the contract, the contract award number, the subcontracting opportunity they (the subcontractor) will perform, the approximate dollar value of the subcontracting opportunity and the expected percentage of the total contract that the subcontracting opportunity represents. A copy of the notice required by this section must also be provided to the contracting agency's point of contact for the contract no later than ten (10) working days after the contract is awarded.
- The respondent must submit monthly compliance reports (Prime Contractor Progress Assessment Report – PAR) to the contracting agency, verifying its compliance with the HSP, including the use of and expenditures made to its subcontractors (HUBs and Non-HUBs). (The PAR is available at <https://www.comptroller.texas.gov/purchasing/docs/hub-forms/ProgressAssessmentReportForm.xls>).
- The respondent must seek approval from the contracting agency prior to making any modifications to its HSP, including the hiring of additional or different subcontractors and the termination of a subcontractor the respondent identified in its HSP. If the HSP is modified without the contracting agency's prior approval, respondent may be subject to any and all enforcement remedies available under the contract or otherwise available by law, up to and including debarment from all state contracting.
- The respondent must, upon request, allow the contracting agency to perform on-site reviews of the company's headquarters and/or work-site where services are being performed and must provide documentation regarding staffing and other resources.

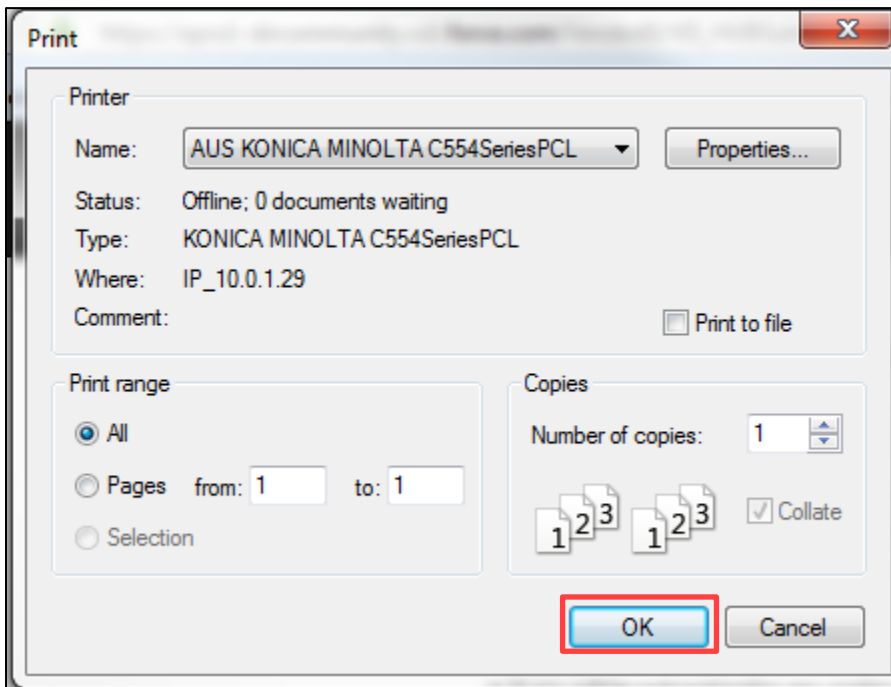
Signature	Printed Name	Title	Date (mm/dd/yyyy)

Reminder:

- If you responded "Yes" to SECTION 2, Items c or d, you must complete an "HSP Good Faith Effort - Method A (Attachment A)" for each of the subcontracting opportunities you listed in SECTION 2, Item b.
- If you responded "No" SECTION 2, Items c and d, you must complete an "HSP Good Faith Effort - Method B (Attachment B)" for each of the subcontracting opportunities you listed in SECTION 2, Item b.

21. Review the instructions for section four and select the "Print" button to print the form.

22. Your computer's print window will appear. Select the printer name and click "OK" to print the HSP form.



- Print your HSP form and sign the affirmation in section four. The signed copy of your HSP form can then be scanned and saved to your computer. To upload the saved form as part of your response documents submission, follow the process detailed in the Upload RFO Response Documents section.

### 5.5 Create a Pricing Form

The pricing information for your response can be entered via the “Create Pricing Form” button on the RFO response’s detail page. Instructions for submitting your pricing data is included below.

RFO Response  
R0005793

**i** Add your documents below (400MB max size). Click the “Submit” button once all documents have been added.

**i** Please review the ESBID posting to ensure you have provided all the necessary documents in your submission.  
Also, please verify the information on the page is correct before submitting. Once submitting your response, you will be unable to make changes unless you withdraw your response completely and restart the submission process.

RFO Response Detail

[Delete](#)
[Submit](#)
[Ask A Question](#)
[Create Pricing Form](#)
[Edit HUB Subcontracting Form](#)

RFO Number	DIR-TSO-TMP-295	Status	In Progress
Submission Date		Vendor	Test Vendor 6
Submitted By		Actual Start Date Posting	3/6/2017
Vendor Conference Date	3/6/2017 2:13 PM	Question Submission Deadline Date	3/21/2017 11:48 AM
RFO Answers to Questions Deadline Date	3/25/2017 2:13 PM	Date/Time Responses Due	3/31/2017 2:11 PM
Actual Start Date Evaluation	3/31/2017		

- Select the “Create Pricing Form” to begin entering your pricing information.

Pricing Form  
**Edit Pricing Form**

**Warning:**  
Vendors can make changes to the Pricing Form until the Actual Start Date Evaluation: 3/31/2017

[Back](#)

Product

**i** No Products Pricing Form data yet. Click the “New Row” button to get started

Category	Subcategory	Brand	Product Description	Manufacturer	Reseller	Discount off MSRP
----------	-------------	-------	---------------------	--------------	----------	-------------------

[New Row](#)

Related Services

**i** No Related Services Pricing Form data yet. Click the “New Row” button to get started

Category	Subcategory	Brand	Product Description	Manufacturer	Reseller	Discount off MSRP
----------	-------------	-------	---------------------	--------------	----------	-------------------

[New Row](#)

- The pricing form will load. Here, you enter pricing information for products on the first section of the form and related services in the second section.
- To enter a new product/related service, choose the respective “New Row” button.

Pricing Form  
**Edit Pricing Form**

Back Submit

---

Product

Action	Category	Subcategory	Brand	Product Description	Manufacturer	Reseller	Discount off MSRP
Save Cancel	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

New Row

---

Related Services

No Related Services Pricing Form data yet. Click the "New Row" button to get started

Category	Subcategory	Brand	Product Description	Manufacturer	Reseller	Discount off MSRP
New Row						

4. A new record entry will be created in the product/related service list.
5. Fill out the fields displayed. Use the scroll bar to navigate to the left/right and access additional fields included on the form.
6. Once you have filled out all information, select the "Save" button next to the entry.
7. Repeat steps 4-6 for each additional product/related service item you would like to include in your response.
8. When all pricing information has been included, select the "Submit" button.

Pricing Form  
**Edit Pricing Form**

✔ **Success:**  
 Successfully Submitted

Back Submit

---

Product

Action	Category	Subcategory	Brand	Product Description	Manufacturer	Reseller	Discount off MSRP
Edit   Del   Duplicate Test					<input type="checkbox"/>	<input type="checkbox"/>	
Save   Cancel	Test 2	Test Subcategory	<input type="text"/>	Testing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	20.0000

New Row

---

Related Services

No Related Services Pricing Form data yet. Click the "New Row" button to get started

Category	Subcategory	Brand	Product Description	Manufacturer	Reseller	Discount off MSRP
New Row						

9. A success message will appear. You can continue adding pricing data until the solicitation response deadline arrives. Select the back button to return to solicitation detail page.

## 5.6 Ask a Question

To submit a question that will be reviewed by DIR resources and potentially included in the Question and Answer addendum, follow the instructions below. **Vendors may submit questions before the deadline date and time.**

RFO Number  
DIR-TSO-TMP-295

RFO Number Detail View Response Ask A Question Subscribe to Solicitation View Solicitation Documents

Actual Start Date Posting	3/6/2017	Vendor Conference Date	3/6/2017 2:13 PM
Question Submission Deadline Date	3/21/2017 11:48 AM	RFO Answers to Questions Deadline Date	3/25/2017 2:13 PM
Date/Time Responses Due	3/31/2017 2:11 PM	Actual Start Date Evaluation	3/31/2017


New Fields

Solicitation Status	Draft	Type	Cooperative
---------------------	-------	------	-------------

RFO Questions

No records to display

1. Select the “Ask a Question” button.
2. The “New RFO Question” page will load. The “Submitted By” field will be prepopulated with your contact information.



My Account   Solicitations   Responses   Log out

RFO Question Edit  
New RFO Question

**⚠ All questions submitted must reference the appropriate RFO/Solicitation page and section number**

Save Cancel

Question Details | = Required Information

Submitted By	Test Vendor
Question	New test question.

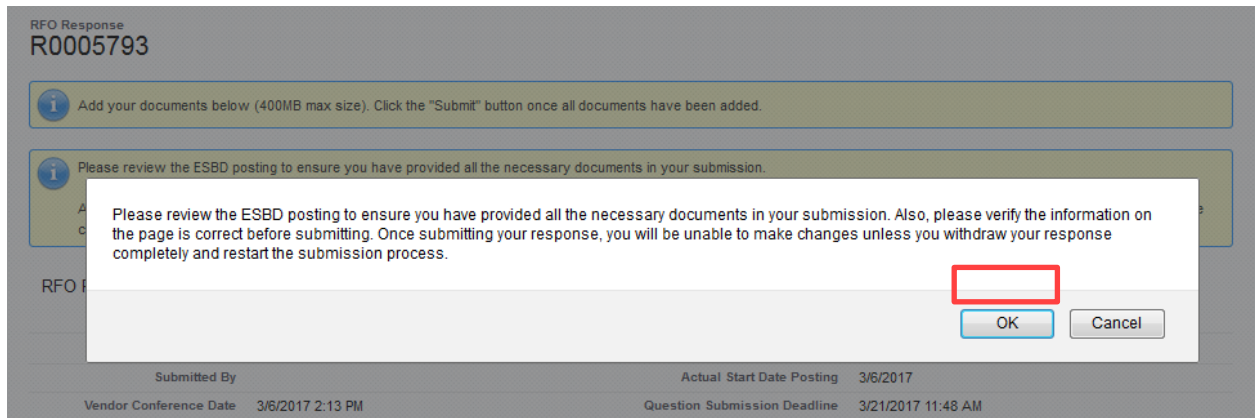
Save Cancel

3. Enter a question in the “Question” field.
4. Select “Save”

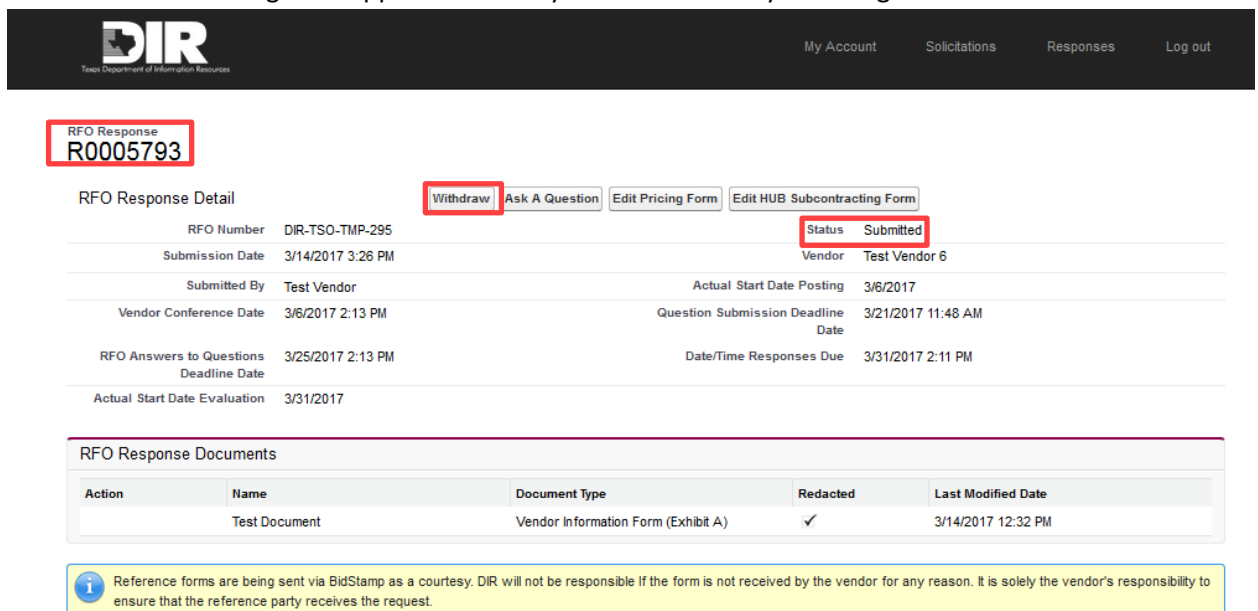




1. Select the “Submit” button.  
screenshot



2. A confirmation message will appear. Confirm your submission by selecting the “OK” button.



3. The Response page will reload and your response will now have a status of “Submitted”. You will receive a confirmation email that contains your response record ID (it will follow the format: R000XXX)
4. To withdraw a previously submitted response, select the “Withdraw” button. **You will have the ability to withdraw and submit a new solicitation up until the response deadline.**