New York City Housing Authority iSupplier Portal Guide

NYCHA iSupplier Portal Guide

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1. iSupplier Introduction

iSupplier is the New York City Housing Authority's (NYCHA) online procurement portal. It is a self-service tool where vendors can see upcoming procurement opportunities, be notified of bids relevant to their offerings, submit bids and proposals, and view existing responses and purchase orders. **All vendors seeking to sell goods and/or services to NYCHA must register on iSupplier**. We also strongly encourage vendors to **create an account** in NYCHA's Procurement and Sourcing Solutions Portal (PASSPort) AND to complete the enrollment package (i.e., business questions and disclosures) so that the status of their organization is 'Filed.'

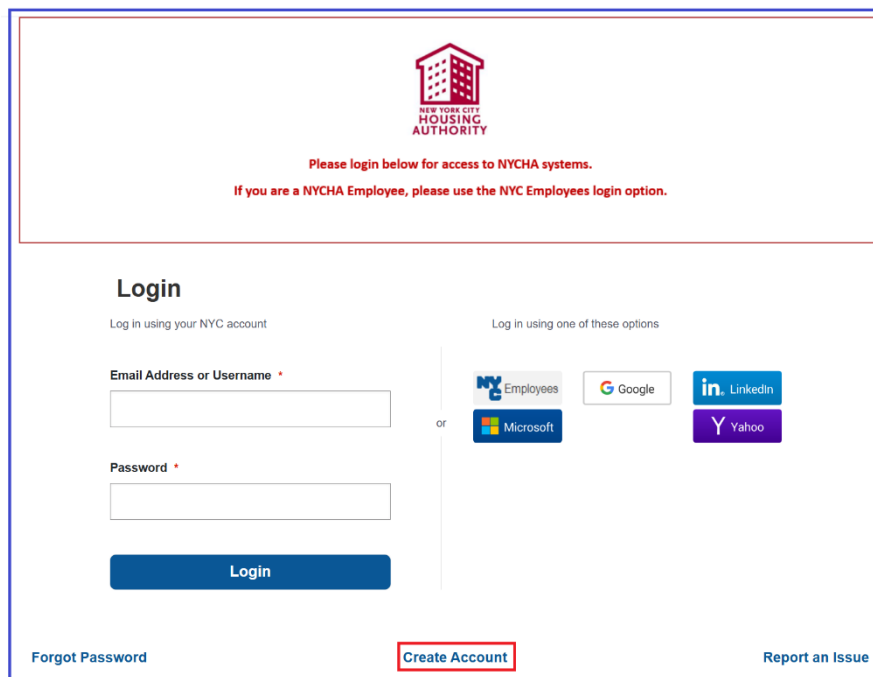# 2. Registering for iSupplier

A. New Vendor Registration

1. Vendors that have **not previously done business** with NYCHA must complete the Prospective Supplier Registration form.
   a. NYCHA strongly recommends vendors to enter a shared business email when filling out the form. If vendors register with the email address of an individual, and that individual later leaves their company, vendors may miss important notifications about opportunities and may have difficulty accessing their account to make changes.
   b. On the second page of the form, under the Products and Services section, vendors must add at least one product and/or service their business can provide to NYCHA.

⚠️

Under the Products and Services section vendors should ONLY include the products and services their business provides. This helps NYCHA better target the vendor's business for relevant opportunities and send bid notifications applicable to the vendor.

2. Vendors will receive an email with instructions on how to create an account. You must create an account using the same email address on the NYC.ID portal. This account will be used for access to all NYCHA systems. If an email is not received by then, please contact iSupplier@nycha.nyc.gov.

3. Full access, including Sourcing Supplier (where vendors place bids), will be added a few hours after registration is approved.
4. Once registration is approved, vendors can log-in to iSupplier and finish setting up their profile (see How to Setup Vendor Profile)
5. Accounts Payable will contact vendors once they receive an award to complete additional steps, including providing a W-9 form.

B. Existing Vendor Registration
1. Vendors that have **previously done business** with NYCHA, but **do not have an iSupplier account** must complete the iSupplier Account Request for Existing Vendors form to register.

2. Vendors will receive an email with instructions on how to create an account. You must create an account using NYC.ID. This account will be used for access to all NYCHA systems. If an email is not received by then, please contact iSupplier@nycha.nyc.gov.

3. After creating an account vendors can log-in to iSupplier and finish setting up their profile, including registering the products and services their business can provide NYCHA (see How to Setup Vendor Profile).
4. Accounts Payable will contact vendors once they receive an award to complete additional steps, including providing a W-9 form.

3. Quick iSupplier Tutorial
A. How to access iSupplier

1. After creating a NYC.ID account for iSupplier/NYCHA systems, vendors can log in to the iSupplier Portal using their created NYC.ID User Name and Password. The same NYC.ID account email address must be used across NYCHA systems.

⚠

When accessing iSupplier NYCHA strongly recommends using **Firefox or Microsoft Edge**, as Google Chrome and Apple browsers are not compatible with the iSupplier portal.

B. iSupplier Main Portal

1. Once logged in, vendors will be in the iSupplier Main Portal. The Portal contains two main applications that vendors will use:
   1) *iSupplier Portal Full Access* and **2)** *Sourcing Supplier*.

In iSupplier *Home Page*, vendors can access information about existing purchase orders, receipts, invoices and payments, and set up their profile.

In *Sourcing Home Page* vendors can access and submit bids and proposals. In *Worklist* vendors can view a list of notifications or items related to bids they are interested in that require action.

C. iSupplier Home Page

1. The iSupplier homepage contains several icons including *Home*, *Navigator*, *Settings*, *Notifications*, *Help*, and *Logout*.
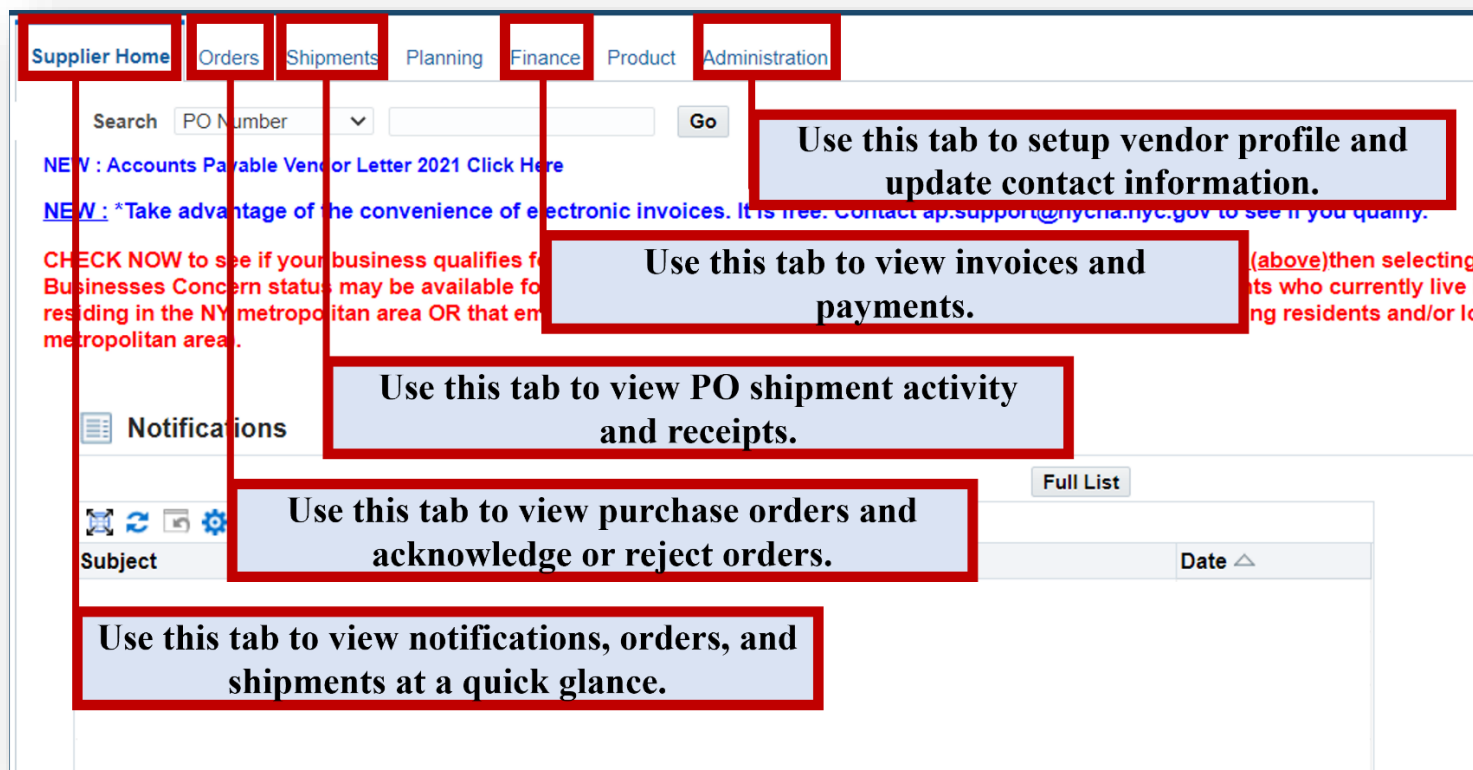
Click the *Home* icon to return to the main portal.

Click the *Navigator* icon to select another application or link without going back to the main portal.

Click the *Settings* icon to set user preferences such as time zone, currency, and proxies.

Click the *Notifications* icon to view messages waiting for review.

Click the *Help* icon to view a pop up iSupplier Guide for help on using the iSupplier portal.

Click the *Logout* icon to log out of iSupplier.

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2. The iSupplier homepage also contains several important tabs. Vendors most commonly use the *Supplier Home*, *Orders*, *Shipments*, *Finance*, and *Administration* tabs.

Make sure to click the *Go* button when searching for purchase orders in the *Order* tab and invoices in the *Finance* tab. These lists may look empty at a first glance but clicking *Go* will automatically populate the table with all items.

D. Sourcing Supplier Worklist

It is important to stay up to date on notifications from NYCHA, which include bid invitations, amendments to bids/proposals, blanket releases, and more.

1. From *Worklist* (see the iSupplier Main Portal section under iSupplier Quick Tutorial) vendors can view a list of notifications or items related to bids they are interested in that require action.

Worklist

View: Open Notifications ▾ Go

Filter the notifications list by selecting an option from the *View* drop down menu and then clicking *Go*.

Select Notifications: Open Reassign Close |

Select All | Select None

Select	Subject △	Sent △	Due - Fn Level
☐	Acknowledgement Required: Amendment 1 to RFQ 3448... ...MENT TRANSFORMATION)	05-Oct-2021	
☐	Acknowledgement Required: Amendment 3 to RFQ 344879 (SMD_IT_RFP_344879_HUMAN CAPITAL MANAGEMENT TRANSFORMATION)	19-Oct-2021	
☐	Acknowledgement Required: Amendment 1 to RFQ 269843 (RFP_ The Development & Implementation of a RRP Training Course)	18-May-2021	
☐	Acknowledgement Required: Amendment 2 to RFQ 269843 (RFP_ The Development & Implementation of a RRP Training Course)		
☐	Acknowledgement Required: Amendment 1 to RFQ 323899 (SMD_RFP_ PROGRAM MANAGEMENT SERVICES)		
☐	Acknowledgement Required: Amendment 2 to RFQ 323899 (SMD_RFP_ PROGRAM MANAGEMENT SERVICES)		
☐	NYCHA - Blanket Release 2009087-15, 1		
☐	NYCHA - Blanket Release 2009087-17, 1	16-Jun-2021	
☐	Acknowledgement Required: Amendment 1 to RFQ 327890 (RFP_SECTION 8 PROJECT BASED VOUCHERS FOR EXISTING HOUSING ROUND 2)	29-Jul-2021	
☐	Acknowledgement Required: Amendment 2 to RFQ 344879 (SMD_IT_RFP_344879_HUMAN CAPITAL MANAGEMENT TRANSFORMATION)	13-Oct-2021	

Click the name under the *Subject* column to open the notification.

⚠️

While vendors should regularly check their email for important messages, **NYCHA strongly recommends using *Worklist* as the primary place to view notifications**; do not rely on email as messages can end up in the spam folder or may be sent to another associated email on file with the business.

4. Setting-up Vendor Profile

Vendor profile management enables vendors to manage key profile details used to maintain a business relationship with NYCHA. This profile information includes address information, names of main contacts, business classifications, banking details, and category information about the goods and services vendors provide. Vendors benefit from managing their profile by effectively representing themselves to NYCHA and updating their profile details as necessary, making important information accurate.

A. Navigate to Profile Management

1. Log in to the iSupplier Portal.
2. In the Navigator box click on the *iSupplier Full Portal Access* application and then click on the *iSupplier Home Page* link (see the iSupplier Main Portal section under iSupplier Quick Tutorial).
3. On the iSupplier homepage, click the *Administration* tab.

B. Profile Management Pages

1. **General**: View business information, including Supplier Number and Taxpayer ID.
2. **Company Profile**: Edit and update business information.
3. **Organization**: Update organization, employee, and tax information.
4. **Address Book**: Add or update business address and any sites associated with the business.
5. **Contact Directory**: Add additional contacts authorized to access NYCHA systems and serve as points of contact.
6. **Business Classifications**: Claim classifications that are appropriate to the business and add required certification details (see How to Register Business Classifications).
7. **Products & Services**: Browse a list of Goods and Services and select all those that apply to the business. NYCHA uses this information to generate bid invitations to vendors (see How to Register Products & Services).
8. **Banking Details**: Create and maintain bank account details for payment.
9. **Payment & Invoicing**: View payments and invoices.
10. **Surveys**: Register the business as a Section 3 Business Concern (see How to Register as a Section 3 Business Concern).
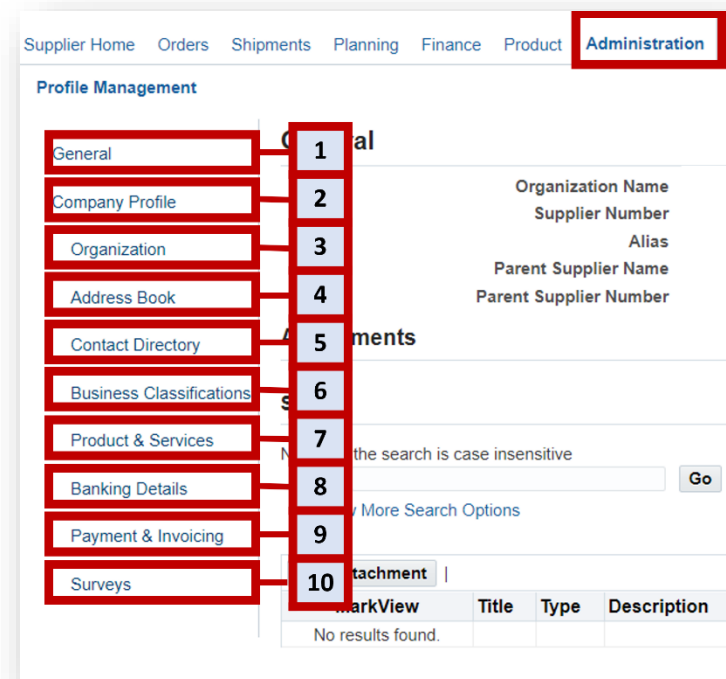
C. How to Register Business Classifications

In the *Business Classifications* page vendors can select various classifications that apply to their business including, Minority-owned, Woman-owned, Resident-owned, Veteran-owned, and Small Business.

1. In the table under the Certification section, select the box or boxes next to each type of Classification that is applicable to the business.
2. Under the Certification section vendors must make sure to check the box signifying they certify and have reviewed the classification below and that they are current and accurate.
3. Click *Save* to save the certifications.

Business Classifications

Cancel | Save

Certification

☐ I certify that I have reviewed the classification below and they are current and accurate.

Last Certified   18-Sep-2012   By

☑ TIP Date format example: 22-Aug-2022

Classification △	Applicable	Minority Type	Certificate Number	Certifying Agency	Expiration Date
Minority Owned	☐	▾			
NA	☐				
Resident Owned	☐				
Small Business	☐				
Veteran Owned	☐				
Women Owned	☐				

⚠️
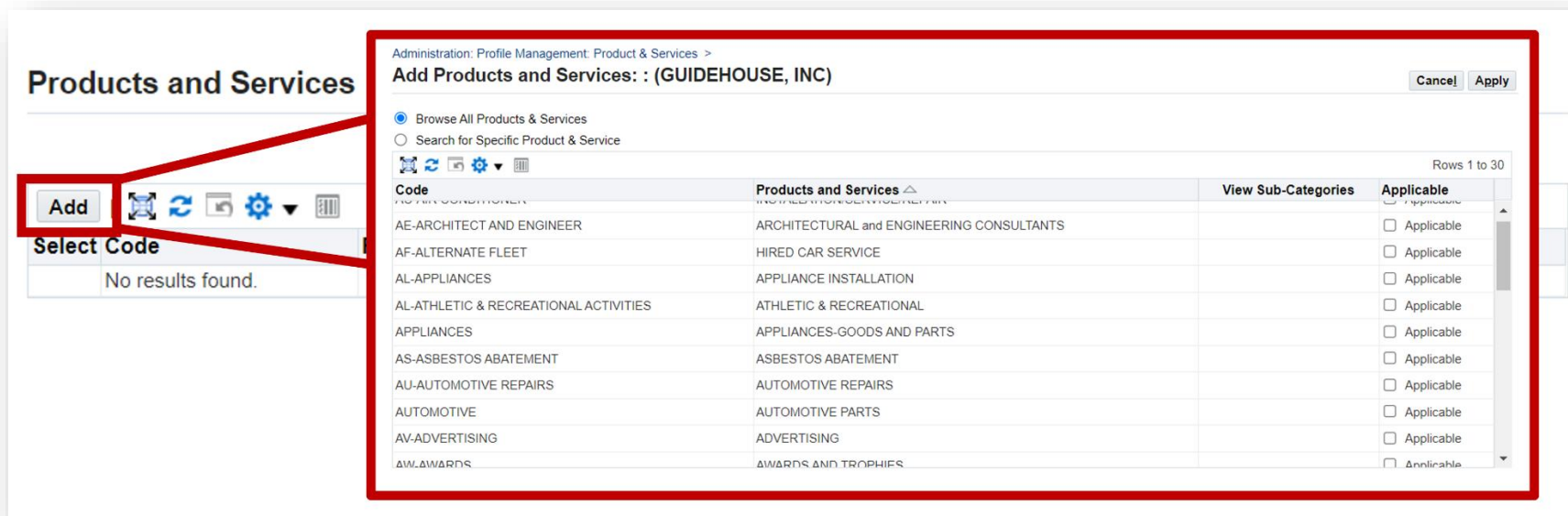
For businesses that are certified by a Government Agency, Authority, or Private Organization as Minority-owned, Women-owned and/or Small Business Enterprise, enter the *Certificate Number*, *Certifying Agency*, and *Expiration Date* next to the appropriate Classification.

D. How to Register Products & Services

In the *Products & Services* page vendors can select various Products and Services that their business provides.

1. Click *Add* to browse or search for all products and services applicable to the business.
2. Carefully review the list of products and services and make sure to select only those products and services that are applicable to the business.
3. Select the products and services the business provides by checking the *Applicable* box on the appropriate line.
4. Click *Apply* at the top right of the page to save all selections.
5. For additional help on registering products and services, please contact procurement@nycha.nyc.gov.

⚠️

Vendors should ONLY include the products and services the business provides. This helps NYCHA better target the vendor's business for relevant opportunities and send bid notifications applicable to the vendor.

E. How to Register as a Section 3 Business Concern

In the *Surveys* page vendors can self-register as a Section 3 Business Concern (S3BC).
1. Locate the *Section 3 Self Registration* survey in the table.
2. Click the pencil icon under *Update* to open the S3BC survey.
3. Fill out and submit the survey.

Update			Surveys

Subject	Last Update By	Last Update Date	Update
Section 3 Self Registration			✏️

What is a Section 3 Business Concern (S3BC)?

A S3BC is a business concern meeting at least one of the following criteria, documented within the last six-month period:
1. It is at least 51 percent owned and controlled by low- or very low-income persons;
2. Over 75 percent of the labor hours performed for the business over the prior three-month period are performed by Section 3 workers (see criteria for Section 3 Workers below); or
3. It is a business at least 51 percent owned and controlled by current public housing residents or residents who currently live in Section 8-assisted housing.

For more information about Section 3 and detailed steps on how to register as a S3BC, please view the *Section 3 Business Concern Registration Guide*.
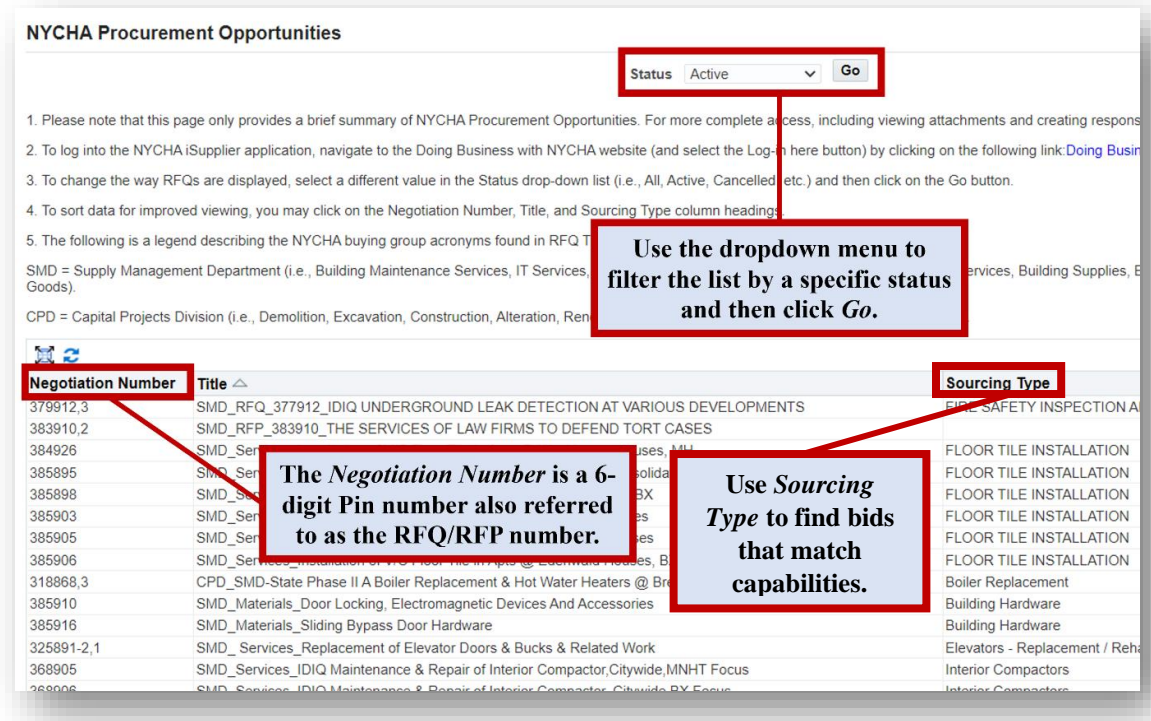
5. Bid Opportunities

NYCHA publishes a publicly available list of bid opportunities on their website. As such, **an iSupplier account is not required to view bid opportunities**; however, detailed bid documents can only be accessed with an iSupplier account (see How to View and Download Bid Documents).

A. How to View Bid Opportunities at NYCHA

1. Navigate to NYCHA Procurement Opportunities. The list is automatically filtered by active solicitations open for vendors to submit proposals to.
2. To filter the list by a different status, click on the *Status* drop-down menu
3. Status Definitions:
   a. **Preview**: Bid/proposal is currently in the drafting process and not yet open for bidding.
   b. **Active**: Bid/proposal is open for bidding.
   c. **Closed**: Bid has been awarded.
   d. **Partially Awarded**: Vendor has been chosen and award is in process.
   e. **Awarded**: Award has been completed.
   f. **Canceled**: Bid/proposal has been canceled and will not be awarded.

Use the **Negotiation Number** associated with the solicitation to search for and submit a bid to the solicitation in iSupplier (see How to Access and Search for Bids). Vendors should also check **Sourcing Type** for bids that might match match their capaiblities.

6. Viewing and Submitting Bids

The *Sourcing Supplier* homepage (see the iSupplier Main Portal section under iSupplier Quick Tutorial) contains a list of solicitations vendors have been invited to as well as active and draft responses. This is also where vendors can view bid details, download bid documents, and submit bids.

A. How to Access and Search for Solicitations

1. Log in to the iSupplier portal.
2. Click on the *Sourcing Supplier* application and then the *Sourcing Home Page* link (see the iSupplier Main Portal section under iSupplier Quick Tutorial).
3. Click on the *Negotiations* tab.
4. In the *Search Open Negotiations* box choose *Number* from the drop-down menu.
5. Enter the 5 to 7 digit negotiation number also known as an RFQ/RFP number in the box.
6. Click *Go*.
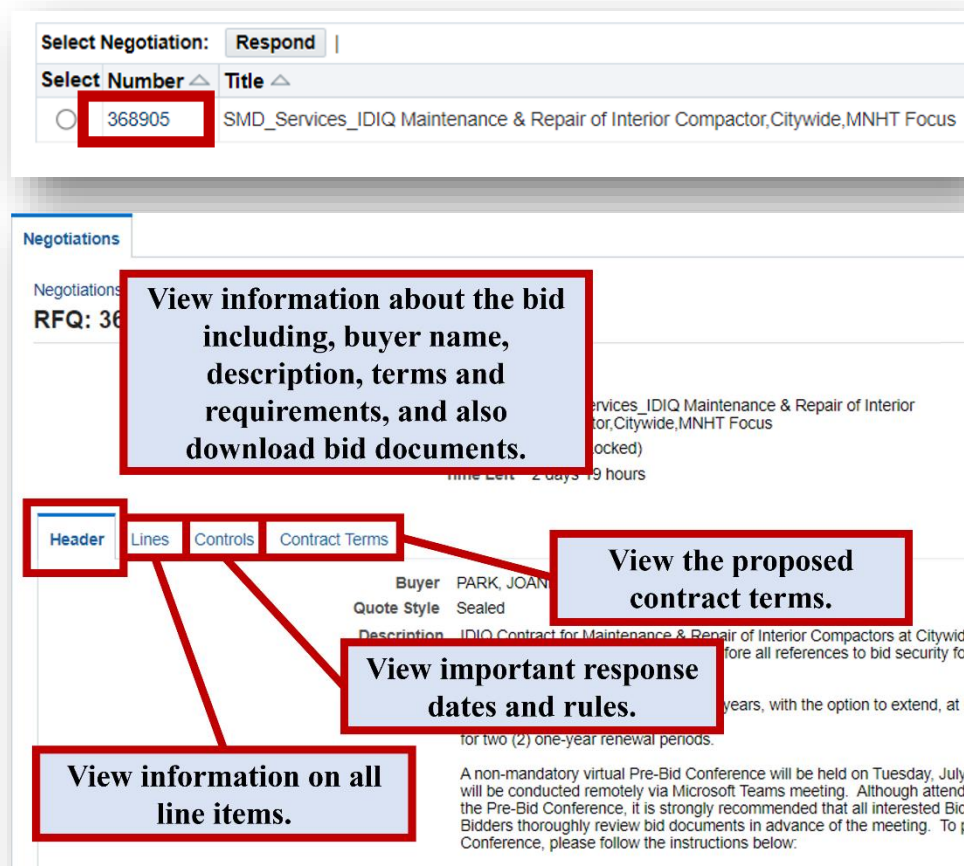
For accurate and up-to-date bid opportunties vendors should view NYCHA's Procurement Opportunities list on the main NYCHA website. This list contains negotiaion numbers associated with bids that vendors can use when searching for bids in iSupplier (see How to View Open Bids for detailed instructions).

B. How to View and Download Bid Documents

1. Select a bid by following steps 1-6 of How to Access and Search for Bids.
2. Click on the number under the *Number* column of the desired bid.
3. Click on the *Header* page and scroll down to the *Notes and Attachments* section.
4. Under *Notes and Attachments* vendors can download each document by clicking on the name under the *Title* column of the document.
5. Save the documents on a computer to view offline. **Note**: Some documents will have to be filled out and uploaded when submitting the bid/proposal.

Select Negotiation: Respond |

Select | Number △ | Title △
○ | 368905 | SMD_Services_IDIQ Maintenance & Repair of Interior Compactor,Citywide,MNHT Focus

Negotiations

Negotiations
RFQ: 36

View information about the bid including, buyer name, description, terms and requirements, and also download bid documents.

...ervices_IDIQ Maintenance & Repair of Interior ...tor,Citywide,MNHT Focus ...ocked)

Header | Lines | Controls | Contract Terms

View the proposed contract terms.

Buyer PARK, JOAN
Quote Style Sealed
Description IDIQ Contract for Maintenance & Repair of Interior Compactors at Citywide ...fore all references to bid security fou...

View important response dates and rules.

...years, with the option to extend, at N...
for two (2) one-year renewal periods.

A non-mandatory virtual Pre-Bid Conference will be held on Tuesday, July ...
will be conducted remotely via Microsoft Teams meeting. Although attenda...
the Pre-Bid Conference, it is strongly recommended that all interested Bidd...
Bidders thoroughly review bid documents in advance of the meeting. To pa...
Conference, please follow the instructions below:

View information on all line items.

💡

Optionally, vendors can inquire or get clarification about the bid/documents from the buyer using *Online Discission*. From the *Actions* drop-down menu on the top right of the page, select *Online Discussions* and click *Go*. Click *New Message*. Fill in the *Subject* and *Message* fields and optionally add any attachments. Click *Send*. This replaces any email communication.

C. How to Submit a Bid

1. Select a bid by following steps 1-6 of <u>How to Access and Search for Bids</u>.
2. The system will let vendors know if the bid has a new addendum, which they must acknowledge before proceeding to respond.

⚠ **Warning**

RFQ 379906 has been amended. To be considered for award you must acknowledge each amendment and submit (or resubmit) all your responses to ensure that they comply with the changes.

View Amendment History

3. Acknowledge participation in the bid by selecting *Acknowledge Participation* from the *Actions* drop-down menu and *clicking Go* on the top right of the top right of the page. To confirm participation, click *Yes* and then click *Apply*.

Actions Acknowledge Participation ⌄ **Go**

4. Create a quote by selecting *Create Quote* from the *Actions* drop-down menu and *clicking Go* on the top right of the page.

Actions Create Quote ⌄ **Go**

    a. Accept the Terms and Conditions of the Sourcing tool before proceeding.After reading the Terms and Conditions, click on the checkbox at the bottom left of the page.

    Negotiations >
    Terms and Conditions   Cancel Accept

    The following terms and conditions must be accepted before a quote is placed in this RFQ.

    By responding to this solicitation, the supplier acknowledges and agrees to be bound by the terms and conditions of the solicitation and certifies that the person submitting the response is authorized to sign and bind the supplier. The supplier agrees that the resulting contract is the complete and exclusive statement of the agreement between the parties, which supersedes all prior agreements, oral or written, and all other communications between the parties relating to the subject matter of the solicitation. The supplier certifies that any and all information contained in the submittal is true, and further certifies that the submittal is made without prior understanding, agreement or connections with any person, firm or corporation submitting a response for this same solicitation and is in all respects fair and without collusion or fraud.

    The person submitting this response hereby individually certifies to the above information by the use of their username and/or password, which constitutes their signature.

    b. Next, click *Accept* on the top right of the page.

    Attachments

MarkView	Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
No results found.										

    *☐ I have read and accepted the terms and conditions

5. Fill out information in the *Header* page.

⚠️

Make sure that all required documents are signed, initialed, dated, and notarized where applicable. Do not upload blank documents.

6. Fill out information in the *Lines* page
   a. For **RFQs requiring a Bid Factor** enter the bid factor number in the *Bid Factor* field and click *Calculate Line Price* to automatically populate the quote price for each line item.
   b. For **RFP responders** enter "0.01" in the *Price Quote* field since specific pricing information will be obtained from the Cost Proposal. Confirm the *Target Minimum Release Amount Quote* is set to *Yes*.
   c. For **all other bids** enter a dollar amount under the *Quote Price* column next to each line item.
      - Vendors can also complete this section offline by clicking on the *Quote by Spreadsheet* button on the top right of the page.
      - Under *Step 1: Export Spreadsheet*, choose a format and click *Export* to download the spreadsheet.
      - After completing the spreadsheet, under *Step 2: Import Spreadsheet*, click *Import* to upload the spreadsheet to the portal.
7. When finished click *Continue* on the top right of the page and then click *Validate* to verify the response.
8. Finally, click *Submit* on the top right of the page. Vendors will receive a confirmation that their bid response has been submitted.
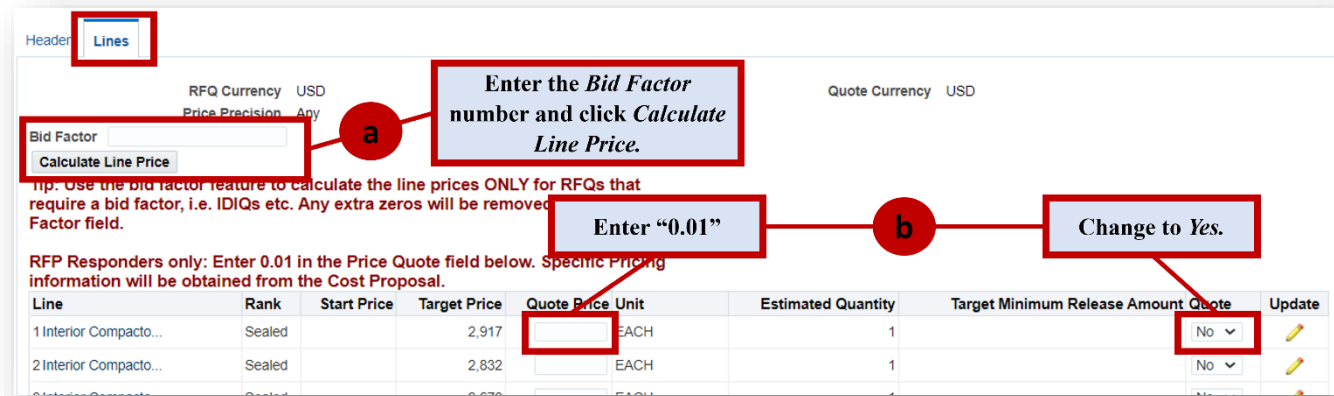
18

7. Maintaining iSupplier Account
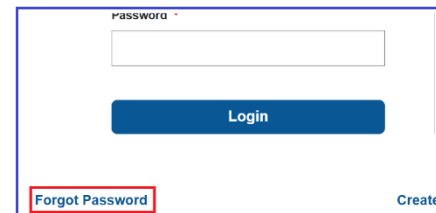
A. Request New Login Username/Email

1. To request a new login email, the vendor must email the desired changes along with their tax ID to procurement@nycha.nyc.gov and isupplier@nycha.nyc.gov.
2. An email with instructions will be sent to the registered email account.

B. Forgot Password

If a vendor forgets their password, they must rest their password.

3. Navigate to the iSupplier Portal Login.
4. Click on *Forgot Password* via NYC.ID and fill out the prompts.
5. An email with a password reset link will be sent to the registered email account.

⚠️

Passwords do not expire

Passwords must be at least eight characters and must contain at least one letter (a to z or A to Z).

Passwords must contain at least one number or special character.

Passwords cannot contain spaces or the word password.

After five consecutive failed login attempts, a user is shown a CAPTCHA challenge
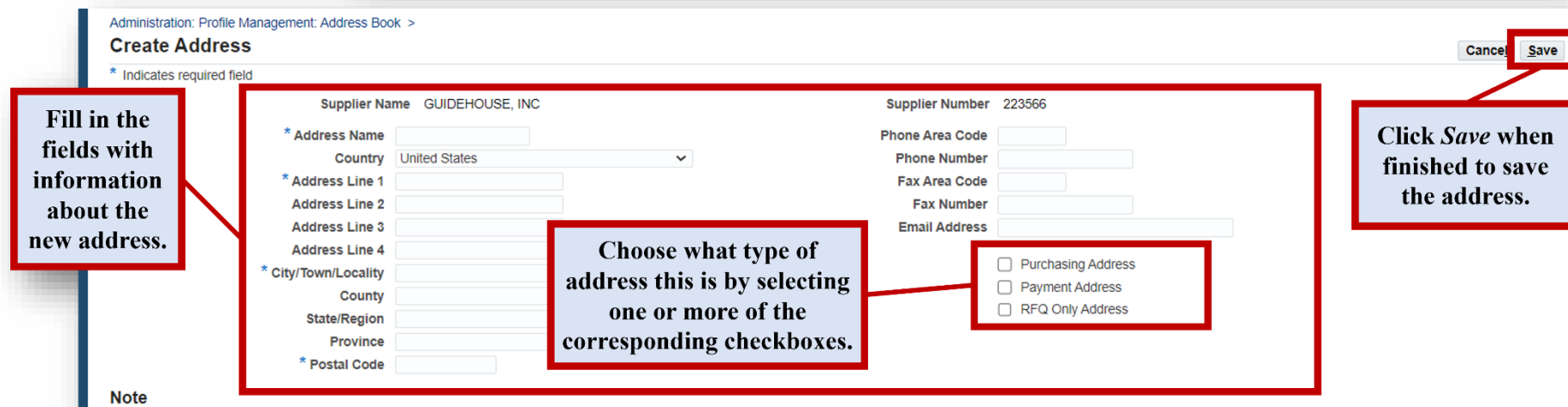
After eight consecutive failed login attempts, the user's account is permanently locked, until the user resets their password.

C. Update Address

It is important to maintain a current address so purchase orders and payments can be issued correctly. In *Address Book* vendors can add, update, or remove addresses. **Vendors can add multiple addresses to be used for different purposes such as purchasing or payment.**

1. Log in to the iSupplier Portal.
2. In the Navigator box click on the *iSupplier Full Portal Access* application and then click on the *iSupplier Home Page* link (see the iSupplier Main Portal section under iSupplier Quick Tutorial).
3. On the iSupplier homepage, click the *Administration* tab and then click on the *Address Book* page.
4. To create a new address click *Create* and fill in the fields.

D. Add Additional User Accounts

In *Contact Directory*, vendors can add or update information about additional users authorized to access NYCHA systems and serve as points of contact. **Vendors are responsible for inactivating contacts that no longer represent their company.**

1. Log in to the iSupplier Portal.
2. In the Navigator box click on the *iSupplier Full Portal Access* application and then click on the *iSupplier Home Page* link (see the iSupplier Main Portal section under iSupplier Quick Tutorial).
3. On the iSupplier homepage, click the *Administration* tab and then click on the *Contact Directory* page.
4. To create a new contact click *Create* and fill in the fields.

Contact Directory : Active Contacts

General
Company Profile
Organization
Address Book
Contact Directory
Business Classifications
Product & Services
Banking Details
Payment & Invoicing
Surveys

	First Name △	Last Name △	Supplier Name ▲	Phone Number △	Email △	Status △	User Account	Addresses	Update
						Current	✓		✎
						Current	✓		
						Current	✓		✎

Create a new contact.

Update information about an existing contact or inactive them to remove their access to the iSupplier account.

▶ **Contact Directory : Inactive Contacts**

Administration: Profile Management: Contact Directory >
Create Contact
* Indicates required field

1 **Fill in the fields with information about the new contact.**

Contact Title
First Name
Middle Name
* Last Name
Alternate Name
Job Title
Department
Email Address
Url

NOTE: Enter a date after which the contact will no longer have access to the iSupplier account (optional).

Phone Area Code
Phone Number
Phone Extension
Alternate Phone Area Code
Alternate Phone Number
Fax Area Code
Fax Number
Inactive Date
(example: 16-Aug-2022 19:45:00)

4 **Apply**

Click *Apply* when finished to save the new user account/contact.

User Account

2 **Select the checkbox to create a user account for the contact and fill out the fields.**

Create User Account for this Contact ☑
* Supplier Name
* Username

NOTE: This is the username the contact will use to log in to the iSupplier account.

Responsibilities

Select All | Select None

3 **Give the contact access to certain responsibilities by selecting the corresponding checkboxes.**

Select Responsibility	Application
☑ iSupplier Portal Full Access	iSupplier Portal
☐ Sourcing Supplier	Sourcing

8. Submitting a Bid Quick Reference

1. **Login to the iSupplier Portal**
   - Click on *Sourcing Supplier* and then click on the *Sourcing Home Page*.
   - Next, click on the *Negotiations* tab.

2. **Search for the bid**
   - Obtain the negotiaion number from NYCHA's [Procurement Opportunities](#) list and enter it in the *Search Open Negotiations* box.
   - Click on the number under the *Negotiation Number* column to view and respond to the bid.

3. **Review the bid details**
   - Review the *Header*, *Lines*, *Controls*, and *Contract Term* pages.
   - As needed, select *Online Discussions* from the *Actions* dropdown menu to request additional information or clarify issues related to the bid. This replaces email communication.

4. **Download the bid documents**
   - Click on the *Header* page.
   - Under *Notes and Attachments* click on the name under the *Title* column of the document to download it.

5. **Acknowledge Participation**
   - Select *Acknowledge Participation* from the *Actions* dropdown menu and then click on the *Go* button.
   - Click on the *Yes* button to confirm participation in the bid and then click on the *Apply* button.

6. **Create a quote**
   - Next, select *Create Quote* from the *Actions* dropdown menu and then click on the *Go* button.
   - Accept the Terms & Conditions.
   - In the *Header* section, enter the date when the quote expires and click on the *Add Attachment* button to attach required documents.
   - In the *Lines* section, enter a dollar amount under the *Quote Price* column for each line item and click the *Apply* button when done.
   - **RFQs requiring a bid factor only:** enter the bid factor number in the *Bid Factor* field and click *Calculate Line Price*.
   - **RFP responders only:** enter "0.01" in the *Price Quote* field.

7. **Validate and Submit the Bid**
   - Click on the *Save Draft* button to save a draft response or click on the *Continue* button to proceed to the next step.
   - Click *Validate* to verify the quote before submitting. Then, click on the *Submit* button.

9. FAQ Matrix

1. What is iSupplier?
   Section 1

2. I have not previously done business with NYCHA. How do I register for iSupplier?
   Section 2A

3. I have previously done business with NYCHA but do not have an iSupplier account. How do I register for iSupplier?
   Section 2B

4. I am registered for iSupplier. How do I log in to my account?
   Section 2C

5. How can I receive automatic bid invitations?
   Section 4D

6. Where can I see all my notifications regarding bids/proposals I am interested in?
   Section 3D

7. How do I register my business as a Minority-owned, Woman-owned, Resident-owned, Veteran-owned, and/or Small Business?
   Section 4C

8. How can I register the products and services my business can provide to NYCHA?
   Section 4D

9. How can I register my business as a Section 3 Business Concern?
   Section 4E

10. How can I view current bid opportunities?
    Section 5A

11. How can I find a bid opportunity in iSupplier?
    Section 6A

12. How can I view and download bid documents?
    Section 6B

13. How do I submit a bid?
    Section 6C

14. How can I change my login username?
    Section 7A

15. I forgot my password. How do I reset it?
    Section 7B

16. How can I update my business address?
    Section 7C

17. How can I add additional users to my iSupplier account?
    Section7D