



## VendRep System Checklist - Steps to Start & Effectively Use the VendRep System

Use this checklist to ensure that you complete all required steps to enroll a Business Entity with the Office of the State Comptroller (OSC) Online Services AND complete and certify a vendor responsibility questionnaire. It is suggested that you print this checklist. For detailed instructions, view the online training modules at [http://www.osc.state.ny.us/vendrep/vrsystem\\_vendor\\_support.htm#vtraining](http://www.osc.state.ny.us/vendrep/vrsystem_vendor_support.htm#vtraining).

Description	Complete
<p><b>Step 1. Enroll in the OSC Online Services</b></p> <p>Go to <a href="https://portal.osc.state.ny.us/wps/portal">https://portal.osc.state.ny.us/wps/portal</a> and click "Enroll Now." To enroll in OSC Online Services you will need:</p> <ul style="list-style-type: none"> <li>• Business Entity Legal Business Name, address, and telephone number</li> <li>• Taxpayer ID Number</li> </ul>	<input type="checkbox"/>
<p><b>Step 2. Submit Business Account Authorization Form</b></p> <p>The <a href="#">Business Account Authorization Form</a> must be COMPLETED, NOTARIZED and SUBMITTED to OSC by fax, e-mail, or mail. If you do not print or save the form during enrollment, the form can be found at: <a href="http://www.osc.state.ny.us/portal/forms/aaform.pdf">http://www.osc.state.ny.us/portal/forms/aaform.pdf</a></p>	<input type="checkbox"/>
<div style="display: flex; justify-content: space-between; align-items: center;">  <div style="border: 1px solid black; background-color: yellow; padding: 5px; text-align: center;"> <p><b>Within a reasonably brief period after OSC's receipt of the Business Account Authorization Form, you will receive two e-mails from OSC providing instructions for secure access to the New York State VendRep System. The following steps CAN NOT be completed until the emails are received.</b></p> </div>  </div>	
<p><b>Step 3. Create User Password</b></p> <p>Follow the instructions and link provided in the email to create a password.</p>	<input type="checkbox"/>
<p><b>Step 4. Create Additional Users and Assign VendRep Roles</b></p> <p>To complete and certify a Vendor Responsibility Questionnaire, your users, collectively, must have the Administrator, Contributor, and Certifier role assigned. At your discretion, you may determine to assign these roles to one user or different users.</p> <p style="text-align: center;">How do I add users and roles? Access the link below for more information:  <a href="http://www.osc.state.ny.us/vendrep/vrsystem_vendor_support.htm#vtraining">http://www.osc.state.ny.us/vendrep/vrsystem_vendor_support.htm#vtraining</a></p>	<input type="checkbox"/>
<p><b>Step 5. Log into the VendRep System and complete Basic Vendor Data</b></p> <p><a href="https://portal.osc.state.ny.us/wps/portal">https://portal.osc.state.ny.us/wps/portal</a></p> <p><b>Note:</b> The user completing Basic Vendor Data must have the "Administrator" role. This information determines the type of Vendor Responsibility Questionnaire that is provided to the entity to complete.</p>	<input type="checkbox"/>
<p><b>Step 6. Complete a Vendor Responsibility Questionnaire</b></p> <p><b>Note:</b> The user completing the Vendor Responsibility Questionnaire must have a "Contributor" role.</p> <p>All questions in the questionnaire must be responded to. The questionnaire can be accessed from the Summary or Home page.</p>	<input type="checkbox"/>
<p><b>Step 7. Certify a Vendor Responsibility Questionnaire</b></p> <p><b>Note:</b> The user certifying a Vendor Responsibility Questionnaire must have a "Certifier" role. All sections of the Vendor Responsibility Questionnaire must have a status of "complete" before the questionnaire can be certified. To certify the Questionnaire a user clicks the "Certify" button at the bottom of the Overview page.</p> <p><i>Only upon certification of the Questionnaire, will state contracting entities be able to view a business entity's information.</i></p>	<input type="checkbox"/>