New York State VendRep System

Business Entity Quick Reference Guide:
Using the VendRep System
https://portal.osc.state.ny.us

USING THE NEW YORK STATE VENDREP SYSTEM

The VendRep System allows a Business Entity to complete and certify a vendor responsibility questionnaire, which can be reviewed by authorized State contracting entity staff in making a responsibility determination for contract award as required by New York State Finance Law. The system also provides the Business Entity access to information regarding the status of their current New York State contracts.

For information on enrolling in the VendRep System and User Management, refer to the Business Entity Quick Reference Guide: Enrollment & User Management for Business Authorizers.

ACCESS THE VENDREP SYSTEM

1. To access the VendRep System go to https://portal.osc.state.ny.us
2. Log in using your User ID and Password
3. Authorizers will see the "User Management" tab; all users with VendRep roles will see "Edit My Profile" Find "My Apps" tab on the far right side of the page
4. **Click** "My Apps" tab, select "VendRep System"

ALL VENDREP SYSTEM USERS:

ALL authorized VendRep users can complete the following Enrollment function:

EDIT USER'S OWN PROFILE

1. **Click** "Edit My Profile"
2. Select "Edit" next to section to be changed, make any desired changes
3. **Click** "Save"

VENDREP SYSTEM ROLES

A user must have a VendRep System role to access the VendRep System. Authorizers assign roles to users in Enrollment. (See: Business Entity Quick Reference Guide: Enrollment & User Management for Business Authorizers) Users may have more than one role, depending upon permissions provided by their organization.

The VendRep System has four roles available to vendor users:

1. Administrator - Creates and maintains entity's Basic Vendor Data in the VendRep System; views questionnaire and contract data
2. Contributor - Inputs responses to questionnaire and views contract data
3. Certifier - Reviews and certifies a completed questionnaire and views contract data
4. Guest - Views questionnaire and contract data

CREATE BASIC VENDOR DATA: ADMINISTRATOR ROLE

1. Log in with Administrator role
2. If you agree, accept User Agreement
3. From within the wizard, **click** "Continue"
4. Enter data and complete all required fields
5. Complete Form Information, **click** "Continue"
6. Complete Authorized Contact information, **click** "Next"
7. Add additional contacts, if needed, **click** "Finish"

Homepage refreshes and the vertical navigation bar on the left now includes full functionality.

COMPLETE A VENDOR RESPONSIBILITY QUESTIONNAIRE

The System presents the appropriate questionnaire based on responses to "Business Type" and "Business Activity" in the Basic Vendor Data. Changing the responses to these questions will cause the System to present a different questionnaire type.

Start a Form - Contributor Role

1. At the Vendor Summary Page, **click** "Start New" under "Forms"
2. **Click** "Continue" on the Confirmation page
3. Note: A new form can be started only if there is no other form in progress.

Enter Form Responses - Contributor Role

1. At the Vendor Summary Page, **click** "Edit" under "Forms"
2. At the Form Overview Page, **click** "Edit" under Action for the form section to be completed.

***Note**: "Clear" will remove all answers found in this section*

3. Respond to the questions by selecting answers and entering requested information
4. **Click** "Back" or "Next" or "Save & Overview" to save responses
5. When all sections are complete, **click** "Send Certifier Notifications" to send emails to certifier(s) that the questionnaire is ready to be certified

Certify a Form - Certifier Role

1. At the Vendor Summary Page, **click** "Edit" under "Forms"
2. At the Form Overview Page, review the form responses for truthfulness, accuracy and completeness
3. When in agreement, **click** "Certify"
4. At the Certification Page, **click** "Certify Responses"

Note: State contracting entity users cannot view a questionnaire until certified by the vendor.

Additional Functionality

Edit Basic Vendor Data – Administrator role

1. Select "Edit" next to the Vendor name on Summary Page
2. Make any changes, **click** "OK"

Edit Business Entity Identities - Administrator role

1. Select "Edit" next to Additional Business Entity Identities
2. Make additions and changes, **click** "Done"

Edit Authorized Contacts - Administrator role

1. Select "Edit" next to Authorized Contacts
2. Make additions and changes, **click** "Done"

Edit Form Responses – Contributor Role

1. At the Vendor Summary Page, **click** "Edit" under "Forms"
2. At the Form Overview Page, **click** "Edit" under "Action" for the form section to be completed
3. Enter all changes, **click** "Save & Overview"

***Note**: Whenever a questionnaire is edited, it must be certified for the information to be available by State contracting entity users.*

Viewing & Printing Functions

View an Entire Form—All Roles

At the bottom of the Form Overview Page, **click** "View All"

Print a Form—All Roles

At the Form Overview Page, **click** "View All"
Click "Print" (bottom of the page) to print the form

View Contract Data – All Roles

1. From the VendRep Home page, **click** on the Contract Data link in the vertical navigation bar
2. Refine search results by selecting a filter term from the dropdown boxes. Any combination of available filters may be used
3. **Click** "filter" to view results
4. **Click** any column header to sort results

Vendor Responsibility Information	Help Desk	Access the VendRep System
http://www.osc.state.ny.us/vendrep	ciohelpdesk@osc.state.ny.us 866-370-4OSC (4672) 518-408-4OSC (4672)	https://portal.osc.state.ny.us