Delegate Agencies
Frequently Asked Questions
(FAQ's)
iSupplier Portal
(eProcurement)

1 CONTENTS

1.1 iSUPPLIER FREQUENTLY ASKED QUESTIONS FOR DELEGATE AGENCIES

1.2 GENERAL REGISTRATION AND ADMIN

1. **Question:** **When will this new system impact my agency?**
  Answer: As of **October 1, 2017,** all Delegate Agencies doing business or intending to do business with the City of Chicago are **required** to register and submit all procurements, payment requests, and supplemental documents in the **iSupplier** (eProcurement system) at http://www.cityofchicago.org/eprocurement .

2. **Question:** **Is iSupplier used for all City of Chicago's business/procurement?**
  Answer: Yes. The Oracle is the City of Chicago's Financial Management Procurement System, used to the iSupplier portal. As of **October 1, 2017**, all delegate agencies are required to register and manage all procurement and payments through the iSupplier (eProcurement) portal.

3. **Question:** **Is there a standard naming convention for attaching files?**
  Answer: Yes. All attachments should be properly named to facilitate the processing of requests submitted by our Delegate Agencies; documents with expiration dates should include the expiration date at the end of the file name.

  Please note: *Some City departments may have specific requirements, please contact the contracting department for additional instructions on requirements in this area.*

  Suggested naming conventions, in BOLD:
  - **Articles of Incorporation** *(PDF)*
  - **State of Good Standing Letter** *(PDF)*
  - **Board of Directors** *(PDF)*
  - **SAM Registration Status** *(PDF)*
  - **Financial Statements** (updated annually) *(PDF)*
  - **Certificate of Insurance** *XX/XX/20XX (indicate earliest expiration date if more than one coverage period) (PDF)*
  - **Signature Authorization PO12345 REL 1** *(indicate associated PO Number and/or Release Number) (PDF)*
  - **Cost Allocation Plan Fiscal Year 20XX** *(required if budgeting for indirect cost and must include Federal Authorization (PDF)*
  - **Electronic Funds Transfer Request** *(PDF)*
  - **Audit Communication letter dated** *XX/XX/20XX* (indicate date of correspondence) *(PDF)*

<u>**Suggested naming conventions, in bold, for Contract Documents:**</u>
- **Budget Document** – Excel file format
- **Work Plan (Scope of Work)** – Word or Pdf file format

<u>**Suggested naming conventions, in bold, for Invoice documents:**</u>
- **Invoice** – Excel format (includes summary, personnel, and non-personnel)
- **Support** – Pdf format (support may include but not limited to payroll register, ADP payroll register summary, time sheets for hourly workers, receipts, vendor invoices for non-personnel cost over $5,000)
- **Certification** – Pdf format (includes Invoice Certification Form, Payroll Certification Form, and/or Fee for Service Certification Form. if applicable)

4. **Question:** **What should I do when my organizations required General Information expire (I.e. Insurance, SAM, or State of Illinois Good Standing).**

Answer: Delegate Agencies are required to upload updated information in iSupplier and should not remove expired information from the system. Agencies are required to maintain all updated information in the iSupplier portal and should **add/upload the** new document and renaming the document appropriately and including the appropriate expiration date.

Reminder: Expired information should not be removed/deleted. It is recommended for documents that expire, that a date extension is added to the document description. Delegate Agencies are discouraged from deleting historic information stored in iSupplier.

5. **Question:** **What is SAM?**

Answer: The System for Award Management (SAM) registration is required for agencies to manage and maintain an active DUNS. When you update your agency's profile information, the system will acknowledge your updated information and provide a valid through date. This indicates that your agency's registration is active. You can access the SAM website at: https://www.sam.gov .

Question: **What should I do if my organization's historic information (i.e. Orders and Payments) are not available in the system? I cannot see my agency's payments or orders in the system?**

Answer: **Orders** and **Payments** are available for any agency with existing or previous contracts with the City of Chicago. Agencies experiencing issues viewing or accessing **Orders, Budget Lines,** or **Payments** could be a result of agencies registered under multiple existing vendor names, numbers, or payment sites, which could cause users to experience delays in accessing **Order** or **Payment** information in the system. Assistance will be provided to Delegate Agencies by contacting eProcSupport@cityofchicago.org **and** OBMGMU@cityofchicago.org.

6. **Question:**   **How can I reset my password?**
   Answer: The Login Assistance option is available on the login in screen at: Password and Username Assistance. Please see the following screenshot(s):
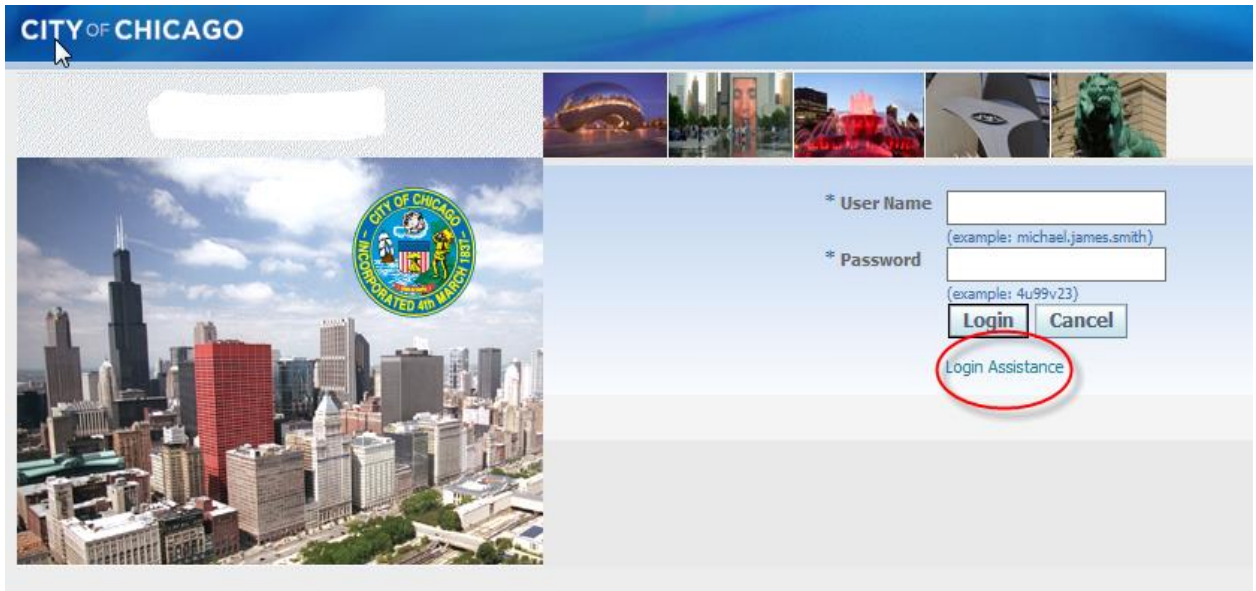
   Users can change their password using the **Preferences** option on the Homepage in iSupplier. Users are discouraged from modifying any additional information under **Preferences**, as this may impact the messenger notification receipt feature and functionality for the user.

   If you do not receive an email providing instructions to reset your password, please check your spam or junk folder. If you have not received the email after verifying the previous step, please contact OBMGMU@cityofchicago.org or (312) 744-0358 for further assistance.

7. **Question:**   **How will I receive notification of my approved Purchase Order (PO) and Release number?**
   Answer: All approved POs and Releases are available in real-time under the **Orders** tab under the **City of Chicago iSupplier Portal with Invoice Creation**.

8. **Question:**   **How will I receive a copy of my approved contract?**
   Answer: For contracts originated through eProcurement/iSupplier, if your agency's proposal is approved by the contracting City department, then the boilerplate and final contract will be uploaded in the Online discussion section of the awarding RFP. Also, the contract can be accessed through the City of Chicago Contract Search at: http://webapps.cityofchicago.org/VCSearchWeb/org/cityofchicago/vcsearch/controller/agencySelection/begin.do

9. **Question:** **Is my agency required to mail a signed original of the budget revision or budget amendment? What is the submission requirement for budget revisions and budget amendments?**

      Answer: Delegate Agencies should contact the contracting City Department for directions on the proper format for sending contract documents and other documents that require a "wet" or 'live' signature.

10. **Question:** **What is a 'Conventional/Legacy' PO and Release number?**

      Answer: Legacy/Conventional POs are purchase orders that were not created through an eProcurement/iSupplier solicitation.

11. **Question:** **Can I export my information (i.e. Order history, Invoice, and Payment History) from iSupplier?**

      Answer: Yes. The Export function is available on the **Orders** and **Finance** sections (tabs) in iSupplier. The export will be generated as a .CSV text file. Users can save the file and convert into Excel, as needed.

12. **Question:** **Where can I access the required templates (i.e. Excel Budget Template, Invoice Signature Authorization Form, etc.)?**

      Answer: The contracting City Department is responsible for providing standard templates. Please reach out to your appropriate contact or liaison.
- The **Department of Public Health's Contracting** Documents are available at: **CDPH Supplemental Documents and Templates**
- The **Department of Planning and Development's Contracting** Documents are available at: **DPD Supplemental Documents and Templates**

1.3 REGISTRATION

13. **Question:**   **How do I register my agency?**

     Answer: Agencies can register at: iSupplier Registration. Scroll to the bottom of the page until you see the **Login/Registration** icon. Once opened, click on registration option and select the link that pertains to your organization **(New or Existing)** and follow the instructions provided.

                                         If you require additional assistance, please use the training link on registration site available here:
https://www.cityofchicago.org/content/dam/city/depts/dps/isupplier/training/Vendor_Registration.pdf

14. **Question:**   **How do I accept an Invitation?**

     Answer: The Department of Procurement Services will send an email notification that includes the username and temporary password. Users are required to reset the password to a new password. Please make sure to check the spam or junk mail if a notification is not received.

                                         Please note: There is a period **(.)** at the end of the sentence in which the temporary password is generated. Please do not include period (**.**) in the entry of your password in the **Password** login field or **Current Password** field when resetting your password under **Preferences**.

                                         If you do not receive an email providing instructions to reset your password, please check your spam or junk folder. If you have not received the email after verifying the previous step, please contact OBMGMU@cityofchicago.org or (312) 744-0358 for further assistance.

15. **Question:**   **How to add and delete users from my agency's account?**

     Answer: Agencies can add or remove users from an agency's account by navigating to the **Admin** tab under the **City of Chicago iSupplier Portal with Invoice Creation**. On the left navigation section, under **Company Profile**, select **Contact Directory**.
- Select **Create** to add a new user
- Select **Update** to remove a user

1.4 RESPONDING TO A RFP SOLICITATION/QUOTE

16. **Question:** **Where can I find new Request for Proposals (RFP), also referred to as Solicitations, Quotes, or Bid Opportunities?**

   Answer: Please use the following link for funding opportunities; Delegate Agency opportunities are available under the **Event** named **Delegate Agency**.

   Here is the website for Bid Opportunities:
   http://www.cityofchicago.org/city/en/depts/dps/isupplier/current-bids.html.

17. **Question:** **Do I have to be registered to find a bid opportunity?**

   Answer: Users are not required to log into the system to view an opportunity. However, users are required to log in to respond and submit the proposal.

18. **Question:** **What are the components of the iSupplier Solicitation?**

   Answer: The Delegate Agency solicitations consist of a **Header and Attachment** section, **Lines**, and **Review/Submit**.

   The **Header** section details the requirements of the RFP/solicitation and allows the agencies to submit required documentation to support the proposal. The documentation is in addition to the centralized General requirements, which must be uploaded under the agency's Admin section of the iSupplier portal. There is a 4000-text limitation (including spaces) to each requirements section, unless the response is a drop-down selection.

   The **Lines** section requires the agency to enter the amount desired on the appropriate account. If an amount is not desired, the user must leave the field blank. Do not enter a 0. The desired budget is the amount requested from the City. The agency must also submit/attach a detailed Excel budget, provided by the city department.

   Review and Submit section requires the agency to review the solicitation, acknowledge the City's certification requirements, electronically, and submit the solicitation. The agency can elect to print the solicitation prior to submission. After the solicitation has been submitted, the system will generate a confirmation message with a Response Number.

19. **Question:** **Can multiple people access and update an RFP at the same time?**

   Answer: Yes, multiple people within an organization can access the same solicitation, however, access is limited to one user editing a document at a time. When one user is editing a solicitation, the system locks the solicitation. For another person to make additional edits, the solicitation must be unlocked.

20. **Question:** **Can an agency submit multiple responses to an RFP.**

   Answer: Yes, an agency can submit multiple responses to an RFP/solicitation. However, each account is unique and a user cannot submit multiple RFP responses under one account. Agencies considering applying for multiple RFPs under an agency's profile is required to apply under different unique user accounts. The iSupplier system will only allow one user account to submit per proposal. If a user intends to respond to the same RFP and selects the same RFP number, the system will

assume the person is requesting to modify the draft or previously submitted proposal.

21. **Question:** **How do view the attachments associated with a RFP?**
    Answer: Under Online Bidding, Select Sourcing, and Sourcing Homepage. The system will open the Negotiations page. Under the Search Open Solicitations Option, Select Number from the drop-down list and enter the RFP number (listed on the Solicitations page of the http://www.cityofchicago.org/eprocurement site).

22. **Question:** **How do I know what to attach to a solicitation?**
    Answer: Each solicitation is different and may require different support documentation or justification to attach. Review the RFP to identify all requirements of the solicitation and contact the city department for additional questions on attachment requirements. All agencies are required to provide and ensure that all **General Agency Information** is available under the Admin tab of the iSupplier site.

23. **Question:** **How do I unlock my solicitation/quote?**
    Answer: Under **City of Chicago Online Bidding**, Select **Sourcing**, and **Sourcing Homepage**. The system will open the **Negotiations page.** Navigate to the **bottom** of the Negotiations page under **Manage** and select **Drafts**. Enter the Response Number and Select the Radio button to select the Response. Select Unlock. Select the Radio Button and select Update.

24. **Question:** **How do I add an attachment on a submitted solicitation?**
    Answer: Under **City of Chicago Online Bidding**, Select **Sourcing**, and **Sourcing Homepage**. The system will open the **Negotiations page. Under the "Your Active and Draft Responses" section, click on the Response Number.** On the Right side of the screen, select the **Actions drop down menu** and select **Create Quote**. If the user only desires to change or add an attachment, the user must add the attachment, then navigate to the Header section. In any of the requirements sections, enter a **period** "**.**"; this action triggers a change to the system. If the update is to both the attachment and the Headers/Lines section, the user can make the necessary changes and continue to submission of the solicitation.

25. **Question:** **How do I delete my draft solicitation/quote?**
    Answer: Under Online Bidding, Select Sourcing, and Sourcing Homepage. The system will open the Negotiations page. Navigate to the bottom of the Negotiations page under Manage and select Drafts. Enter the Response Number and Select the

Radio button to select the Response. Select Delete. The system will ask to confirm that the user wants to delete the solicitation, select Yes or No.

Negotiations						
Search Open Solicitations	Title ⌄			Go		

Welcome, Jaya Darji.

Your Active and Draft Responses

Press Full List to view all your company's responses.

Response Number	Response Status	Supplier Site	Solicitation Number	Title	Type	Time Left
123028	Active	70	6315,1	Office of Budget and Mangement RFP	RFQ	0 seconds

26. **Question:** **What mechanisms are in place to inform bidders about solicitations that are about to close?**

Answer: There is a real time count down of days and time identifying the exact date and time that the solicitation will close. This information is available on the Negotiations homepage.

Negotiations						
Search Open Solicitations	Title ⌄			Go		

Welcome, Jaya Darji.

Your Active and Draft Responses

Press Full List to view all your company's responses.

Response Number	Response Status	Supplier Site	Solicitation Number	Title	Type	Time Left
123028	Active	70	6315,1	Office of Budget and Mangement RFP	RFQ	0 seconds

27. **Question:** **What is a Response Number?**

Answer: A Response Number is a system generated unique tracking number assigned to each response created and associated with a RFP solicitation.

28. **Question:** **Will I receive notifications if there are changes to an RFP?**

Answer: Yes, notifications of addendums will be sent to the originator of the RFP via email. The notification will also be available in the users Worklist Notifications within the iSupplier portal.

29. **Question:** **Do I respond to an amendment?**

Answer: If an amendment is issued, the system will send a notification to the user who created the solicitation, which will be available under the users Worklist. The user must review the changes and acknowledge the changes by clicking the acknowledgement checkbox before proceeding with the update and resubmission of the RFP. The system will issue a new **Response Number** and the status of the Response Number will change from Draft to Active, upon submission. The system will also provide confirmation that the solicitation has been processed.

*Please note that if there are amendments to the solicitation or the user's response in the form of attachments, the system will issue an error message that the RFP has not been modified. If the amendment is a City-issued amendment, the users are instructed to review the amendment's attachments for any

modifications. If the amendment is a user amendment or revision to a submitted quote, the user is instructed to add a period (".") to the last question/requirement; this will allow the system to proceed with the submission without any further errors.

If an amendment is issued, the RFP number will change from the original format and will include a comma with a number following. (i.e. 1234, 1)
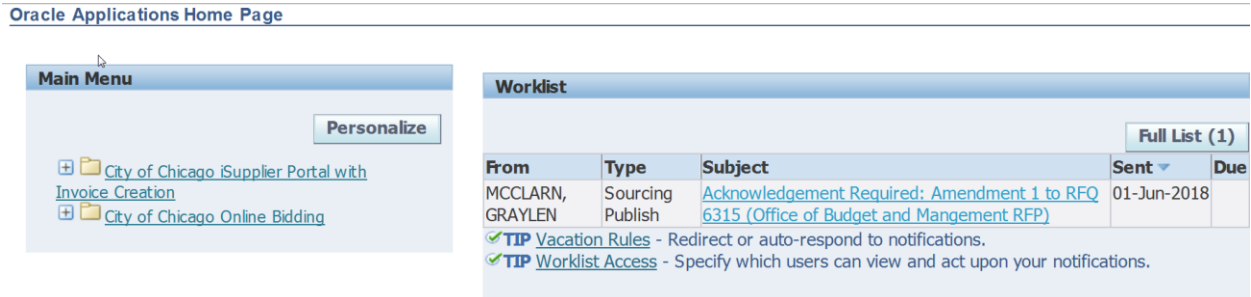
30. Question: **Do I have to resubmit my RFP if there is an Addendum issued for an RFP?**
Answer: Yes, if an agency has submitted an RFP and a notification of addendum is received, the agency must review and acknowledge the addendum, then resubmit the RFP.

31. Question: **How do I confirm that my solicitation has been submitted?**
Answer: When the user submits the solicitation, the system will generate a confirmation message with the Response Number**.** The user can view the Response Number and status to identify the status. If the status is Draft, the solicitation has not been submitted. If the status is Active, the solicitation has been submitted.
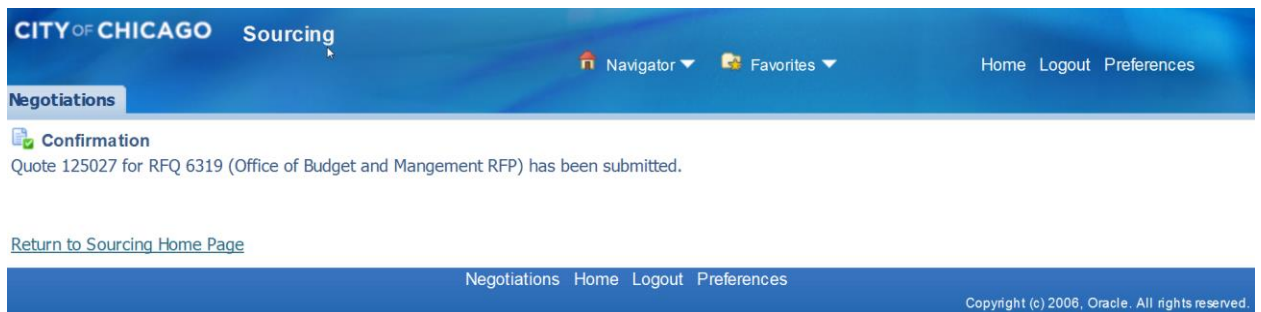
32. Question: **How will I know if the solicitation is submitted?**
Answer: When an agency submits a solicitation, the system will issue a **confirmation notice** with a system generated **Response Number**. The **Response Number** is the receipt for the solicitation and can be used to track the solicitation. If the solicitation is amended, the agency must resubmit the solicitation and a new confirmation and Response Number will be issued. The Response Number will

be available under **City of Chicago Online Bidding**, under the **Sourcing Homepage.** The Navigations homepage will appear and the agency can view **"Your Active and Draft Responses".**

33. *Question:* **How will I know if the solicitation response was approved?**

 Answer: Each respective city department is responsible for reviewing and evaluating all submitted proposals. The user department is responsible for notifying agencies of awarded/approved solicitations and notifying the agencies of non-awarded solicitations. Please contact the user department for additional information.

34. *Question:* **How do I access an Invitation-Only Bid opportunity?**

 Answer: Log into the system and select City of Chicago Online Bidding. The option will expand; select the folder named **City of Chicago Online Bidding**. This will take you to the Sourcing page, from there; you should see the invitation under the section named **Company's Open Invitation** (highlighted below).

 Another option, Delegate Agencies can access the opportunity by using the **solicitation number**. Delegate Agencies can go directly to the solicitation, and **select Number under the drop-down menu** and **enter that number** in the box. Select **'Go'**. This will **take you directly to the opportunity**. **Screenshot below**:

1.5 CYBERGRANTS AND HISTORIC INFORMATION

35. **Question:** **What will happen to the information that was stored in CyberGrants? Will this information be available in eProcurement?**

Answer: Information stored in CyberGrants is archived by the City of Chicago for purposes of complying with record retention requirements. Delegate Agencies are required to maintain documentation as identified in their grant agreement; however, Delegate Agencies were encouraged to export any information from CyberGrants prior to October 1, 2017.

36. **Question:** **Do I have to re-upload my agency's information (i.e. Articles of Incorporation, Insurance, Good Standing Notice) in iSupplier even if I already provided this information to the department or in CyberGrants?**

Answer: Yes, agencies are responsible for uploading required documents in iSupplier's centralized portal. Standard required documents are Articles of Incorporation, Insurance, SAM Registration Status, State Good Standing Letter, Board of Directors, Financial Statements (updated annually)/ Most Recent Audit Information, Signature Authorizations and Cost Allocation Plan (if indirect cost is included). A list of required documentation is available on the following website: https://www.cityofchicago.org/city/en/depts/dps/isupplier/delegates.html

1.6 PROGRAM

37. Question: **What is a Program Code?**

Answer: A program code is a unique code established by the City Department for purposes of identifying their program. This code is required for all vouchers and must be entered in the **Invoice Description** field.

38. **Question:** **Where do I get/find the PO Department Program code?**

Answer: The contracting City Department will provide the program codes to all agencies.

1.7 MANAGE ADMINISTRATION AND ACTIVE AGENCY INFORMATION

39. **Question:** **How do I Create or Inactivate Existing Contacts?**

Answer: Agencies can add or deactivate users from an organizations profile in iSupplier. This option is available under the Main Menu section, in the folder for **City of Chicago iSupplier Portal with Invoice Creation**, under the **Admin** Tab. Click on **Contact Directory** to **Create** or **Edit and Deactivate** a user from an organization. Instructions on Inactivating Users and Instructions for Creating a New User

40. **Question:** **What if I accidently inactivate an existing contact?**

Answer: Log into the system, Under in Menu, select the folder named **City of Chicago iSupplier Portal with Invoice Creation**. Select the **Admin tab** and select **Contact Directory** and select the **Create** option, and re-entered as a new contact.

If the agency requires to reactivate a user with the same username as previously established, contact eProcSupport@cityofchicago.org.

[Instructions for Creating a New Address or Editing Address Information](#)

Please note that changes to the address details or bank account details can be initiated by the user; however, all final changes must be reviewed and approved by DPS prior to the changes being reflected in the system. Agencies will receive an email from eProcSupport@cityofchicago.org when additional information is required or when changes are rejected.

41. **Question:** **What happens if the person (s) managing my agency's account leaves and no one else can access the Agency's account?**

Answer: eProcSupport@cityofchicago.org will assist in creating an account to access the Agency's profile. Delegate Agency must provide information confirming status and authorization from the Agency's Board or Executive Officer. Contact eProcSupport@cityofchicago.org for further requirements.

If you are uncertain if an account has been created for you, use the **Login Assistance** option at the following: [Login/Register](#)

42. **Question:** **Can multiple people register the same organization? How do I invite others into my organization's business account in iSupplier?**

Answer: No. A Delegate Agency can only have one account in the eProcurement system. It is linked using the organizations Federal Employer Identification Number (FEIN). Delegate Agencies can add or deactivate users from an organization's account in iSupplier.
https://www.cityofchicago.org/content/dam/city/depts/dps/isupplier/training/Vendor_Create_New_Address_and_Contact.pdf

43. **Question:** **Can I give View only access to members of my organization?**

Answer: No. Currently, there are only **two** responsibilities:

1) City of Chicago iSupplier Portal with Invoice Creation manages the organizations administrative information **and** submit payment vouchers and;

2) City of Chicago Online Bidding manages solicitations. Delegate Agencies must identify and assign the appropriate responsibilities to authorized users of the organization.

https://www.cityofchicago.org/content/dam/city/depts/dps/isupplier/training/Vendor_Create_New_Address_and_Contact.pdf
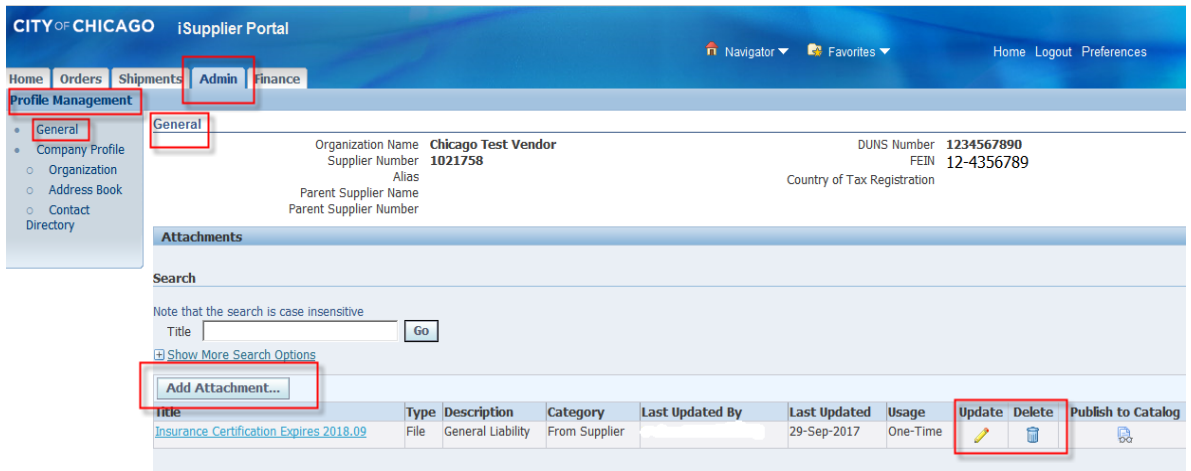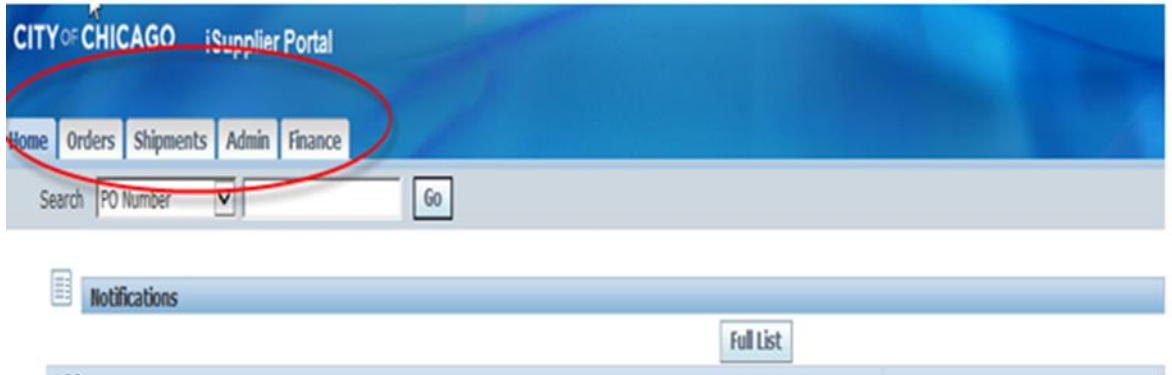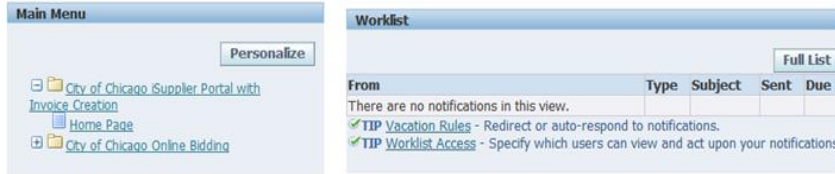
44. Question: **What is the general required documentation and where do I add the attachments?**

Answer: Standard required documents are Articles of Incorporation, Insurance, SAM Registration Status, State Good Standing Letter, Board of Directors, Financial Statements (updated annually), Most Recent Audit Information, Signature Authorizations and Cost Allocation Plan (if indirect cost is included). A list of required documentation and any updated requirements or materials are available on the following website: https://www.cityofchicago.org/city/en/depts/dps/isupplier/delegates.html

Attachments can be uploaded using the following instructions: Log into iSupplier and navigate to the folder named **City of Chicago iSupplier Portal with Invoice Creation,** under the **Main Menu** section. Select the **Admin tab** and select **General Information** and scroll down to **Add Attachments**. Add attachments. Delegate Agencies are required to maintain active and updated organizational

information, which could impact contractual negotiations and/or delay the release of payments.

You can update your agency's information by selecting the folder under the Main Menu option for City of Chicago iSupplier Portal with Invoice Creation. When you select this folder, a new form will appear. The new form will have an Admin tab on the top. The Admin section, under General, is where you can upload your required attachments. **See screenshots below:**

<u>Invoicing</u>

Please note: *The* ***'Save'*** *functionality has been* <u>***corrected***</u>*. Agencies can* ***Save*** *an invoice for submission at a future date by selecting the* ***'Save'*** *option on the second page of the* ***'Create Invoice'*** *form.*

45. **Question**: **My invoice creation form does not have a Remit to location available. How do I find my Remit To address?**

Answer: There is an option to search the various **"Remit To"** codes associated with your agency. If you do not see the "**Remit To**" as the default option, please select the magnifying glass next to the field and select **"Go"** to do a general search for all available sites. Please see the screenshot below:

If this option is not available after searching using the magnifying glass, please contact the Department of Finance at 312-744-2204 or OBMGMU@cityofchicago.org or eProcSupport@cityofchicago.org for further assistance.

46. **Question:** **Where can I find the Create Invoice option?**

Answer: You can access the **Create Invoice** section under the **Finance** tab. See screenshot below:

- Select the **Finance** tab.

- When the **Finance** tab is selected, the system will default to the **Create Invoices** form below. Select **Go** to **Create the Invoice with a PO**:
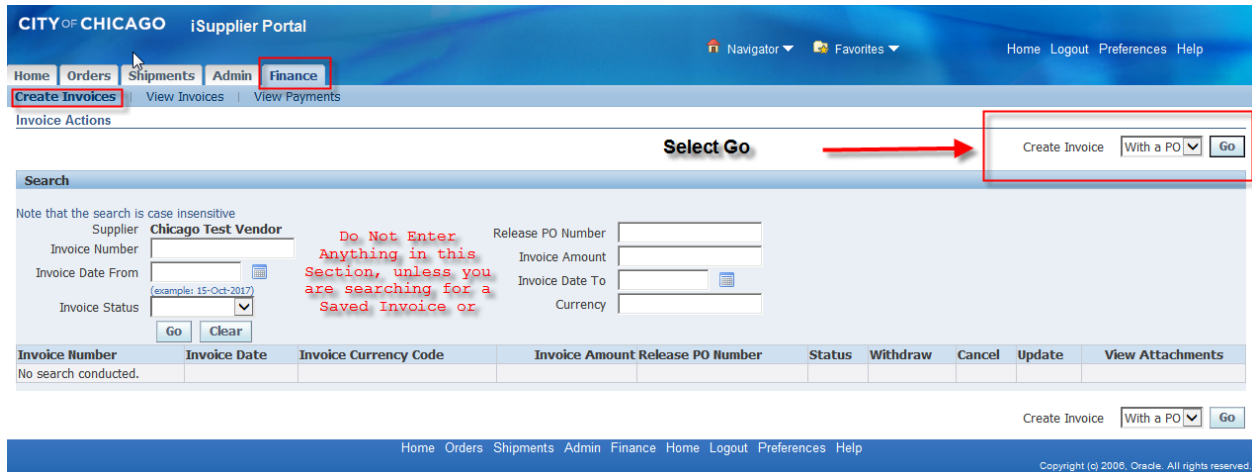
- Enter **PO and Release Number** and Select **'GO'**. All approved budget lines will appear.

- **Select the appropriate lines** and Select **Next**
- **Enter Required Information**, **Attachments**, **Line item budget** request and select **Next**

- Complete the Voucher and select **Submit**.

47. How do I remove a budget line from my invoice?

Answer: If you add a line inadvertently or a line without any funds, the line must be removed prior to proceeding to submit the invoice. If you add a line and want to delete a line, please select the **Back** button and **remove the selected line.** See screenshot below:

- **Remove selected line**. Select **Next** to Continue with submission.

48. Question: **Why should you check the Remit address when submitting payment requests?**

   Answer: The remittance address (**Remit To**) is where your payment will be directed. If you have multiple sites, you would want the **Remit To** address to reflect the proper location, and to ensure that funds will be transferred to the designated bank account.

49. Question: **I cannot see my agency's bank account information?**

   Answer: Please contact the contracting Department to confirm the Vendor Site/Remit To/Pay site associated with the PO. Additional inquiries regarding invoicing or your bank account information, contact **iSupplierinvoices@cityofchicago.org** and/or call Cash Management at 312-744-3233.

50. Question: **What are the benefits for electronic funds transfer?**

   Answer: iSupplier portal is a real-time procurement and payment system, allowing Delegate Agencies to track all electronic payments as soon as requests are approved and processed. The processing of paper checks will delay receipt of payment when compared to the electronic payment option. Delegate Agency are

anticipated to experience and can institute proper cash management through the elimination and delays of receiving paper or "hard copy" checks. **For more information**, please contact the Department of Finance at 312-744-2204

51. Question: **What will happen to PO's and Releases/Contracts created prior to iSupplier?**

Answer: All Delegate Agencies contracts, PO's and Releases are integrated and available to all Delegate Agencies and/or Vendors doing business with the City of Chicago. Payments under all previous purchase orders and releases are available to agencies in the iSupplier portal and all payment preferences and options are also available in the iSupplier portal.

52. Question: **Are voucher supplemental documents required for all departments?**

Answer: Yes, supplemental documents (i.e. Invoice Signature Certification, Excel budgets, Non-Personnel details/receipts, and additional department-specific information is required.

Please note: Documents stored under the **Admin** portal of the **City of Chicago Portal with Invoice Creation** is not required with each voucher submission or RFP submission. Also, some there may require document-specific standards depending on the contracting City department and/or program; please contact the appropriate City contracting department as needed to clarify additional requirements.

53. Question: **Is my agency required to submit the Excel Budget as an attachment to RFP's and Invoices and what if I cannot sign the Excel document?**

Answer: Yes, the Excel template must be used and submitted with all RFPs but are not required for the invoices. There is a separate template that must be used for invoices. If you do not have these templates, please contact your contracting City Department. All applicable forms must be signed and uploaded with the invoice submission.

Please note: The City has implemented a required Invoice Signature Form required for all invoice/voucher submissions in iSupplier; Delegate Agencies are not required to sign the Excel document. Required information is available on the http://www.cityofchciago.org/eprocurement site.

54. Question: **What is an Invoice Certification Form? Is this required for each voucher submission?**

Answer: The updated Invoice Certification Form is available from the contracting City Department and is also available on the Training Materials tab of the iSupplier website at: https://www.cityofchicago.org/city/en/depts/dps/isupplier/online-training-materials.html . The Invoice Certification Form is required for all voucher submissions (contact the City Departments for exceptions).

55. Question: **How will I communicate budget revisions?**

Answer: If you were awarded a PO that was not initiated through an RFP in iSuppler (eProcurement), please contact your contracting City Department to identify the correct method of delivery (i.e. hand-delivered, mailed, or emailed). POs created from a solicitation in iSuppler are required to submit budget revisions and contract amendment requests using the Online Discussion option in iSuppler.

56. **Question:** **How do I update my agency's banking information in eProcurement?**

Answer: Delegate Agencies are not able to update banking information in the system due to security and confidentiality. Delegate Agencies should contact the Department of Finance at (**312) 744-2204** to update all financial institution information.

57. **Question:** **How should your agency number the vouchers/invoices?**

Answer: There are specific methods for agencies with active Purchase Orders, which were not initiated through an iSupplier solicitation and a separate requirement for agencies that receive a new Purchase Order through an iSupplier solicitation. Please see below:

1) Pre-iSupplier (**Legacy**) will use **PO-Release Number-Fiscal Year-Invoice sequence**; and
2) Post iSupplier (**New) Release Number-Fiscal Year-Invoice sequence.** If you have questions about the type of invoice sequence you should use, please contact your contracting department.

58. **Question**: **Can I save my invoice to edit later? How do I find my saved invoice?**

Answer: Yes, users can save invoices for editing later and/or time. The **Save** option is on the second page on the **Create Invoice** form. When you select **Save**, you will receive a confirmation that the invoice has been saved. When the invoice is saved, you can recall the invoice by going to the **Create Invoice** page, under **Search**, **Select Go** and the un-submitted items will appear. Select the **pencil icon** to update the invoice and continue to edit or submit the invoice.

Search options are available for other options, like Status. **Please see screenshots below:**

Step 1: Complete the Invoice Form with Attachments and Quantity and Select **Next**

Step 2: Click **Save**

59. Question:	How do I find my saved invoice/voucher?
Answer:	Saved invoices can be recovered by going to the **Finance** tab, under **Create Invoice,** under the first **Search** option, select **GO**. Please see below for screenshots:

Step 1: Recover Saved item by clicking on the **Finance** tab, **Under Search**, Select **Go** *Agency can select other criteria, as needed

Step 2: All Invoices will appear. Under **Update** column, select the **Pencil Icon**. **Continue updating invoice ad needed.**

Step 3: After you save, you will receive a confirmation that the invoice saved. The invoice will disappear from the screen and will be stored for you to come back later or you can recall the item for further action.

60. **Question:** **How Do I remove a budget line item?**

Answer: When an item is selected inadvertently or with Insufficient funds, select the **Back** button and **remove the lines** from the invoice. Please see the following steps:

- Step 1: Select the **Back** option

- Step 2: **Select the line** that you would like to remove
- Step 3: Click **Remove from Invoice**
- Step 4: Select **Next to continue** with the invoice

61. Question: **What should be entered under the Goods/Services Date Received?**

Answer: Enter the **last date** in which the services were received or rendered for the period being vouchered. (I.e. if the voucher period of performance covers the period of 09/01/17-**09/29/17**, the Goods/Services Received date is **09/29/17**. Note that this field has a calendar date option

62. Question: **What should I do if my invoice is rejected?**

Answer: If invoice is rejected, please refer to the rejection note entered by the contracting City Department and take the necessary action to address the rejection. Funds are immediately reserved when invoices are created; All rejected and the invoice

must be cancelled by the agency. Once cancelled, funding will be available for use.

The **Rejection note** is emailed to the user account submitting the invoice and is also available under the **Worklist**. If a note is not received and the user has checked the spam and junk email folders, please contact the contracting department for additional justification.

Reminder: The user must **Cancel** the invoice, which **un-reserves the funds**; to allow the agency to resubmit the invoice. **Please see below for cancelling an invoice:**

Cancel Icon

Please note: All created invoices must have a **unique Invoice Number**. After all the identified items have been addressed, the invoice should be resubmitted with a unique **"Invoice Number"** that includes reference to **"R"** for Resubmission for

Rejected invoice. The **"R"** should be referenced at the end of the **Invoice Number**.

63. Question: **Will my funds be available if an invoice is rejected?**
    Answer: No, the agency is required to cancel the invoice.

64. Question: **How do I cancel my invoice?**
    Answer: Please follow these steps to cancel an invoice:
    1) Go under the **Finance** Tab
    2) Select **Go** under the first search option – This will allow for a **general search** on all invoices/items
    3) A list of In **Process**, **Rejected, Cancelled**, and **'Unsubmitted'** Invoices will appear
    4) Under the **Cancel** tab, there is an icon that will allow you to cancel the invoice. When the invoice is cancelled, the funds are **unreserved** and you can submit the voucher. Please remember that the **<u>invoice number must be unique when resubmitting a rejected or resubmitted voucher</u>** due to deletions.
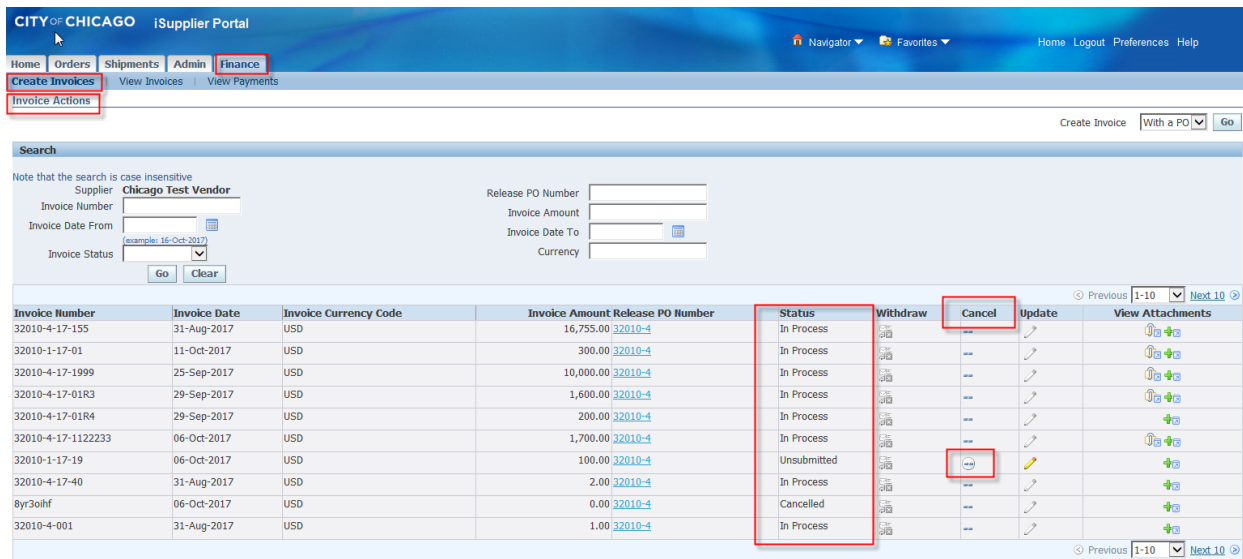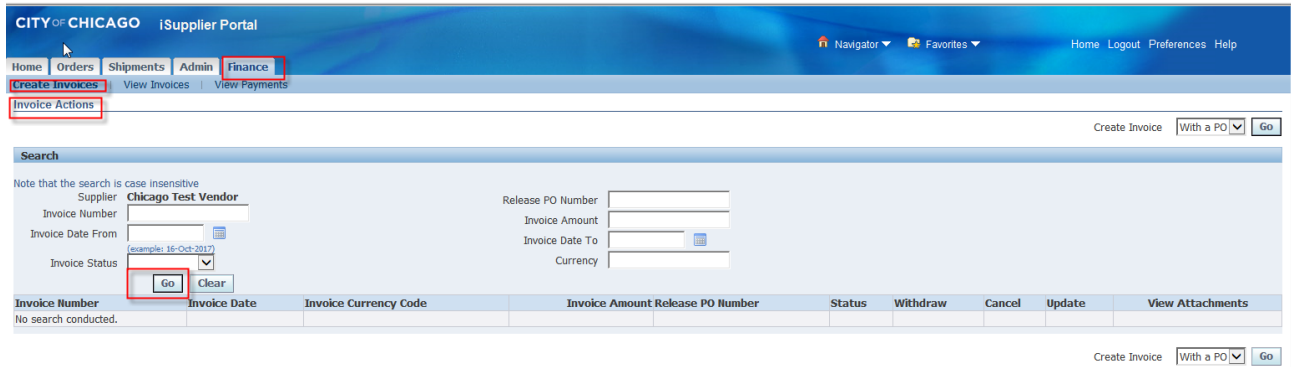
Question: **How should I attach documents? Is there a specific preference that the City requires for uploading and naming attachments?**
    Answer: See response to **Question 3** for detailed explanation.

65. **Question:** **If I must resubmit a voucher, how should I number the invoice for resubmission in iSupplier?**

    Answer: All resubmitted vouchers must be submitted with an 'R' at the end of the Invoice Number to indicate that the invoice has been resubmitted. If more than one resubmission, then the invoice should be numbered accordingly (i.e., 1, 1R, 1R2, 1R3, etc.)

1.8 HOT TOPIC

Question: **What are my options if I can't submit my response due to system problems?**

Answer: When responding to an RFP using the electronic procurement system, you must accept the Terms and Conditions which states, '' The City makes no representations or warranties that the electronic procurement system utilized by the City on any procurement will accurately and timely transmit any bidder's bid or proposal or any other information to the City. All bidders use this system at their own risk. The City disclaims all liability that may result or arise from the use by any bidder of the eProcurement system, including claims for lost profits and consequential damages."

1.9 CONTACT INFORMATION:

- ❖ **Questions on Registration:** eprocsupport@cityofchicago.org
- ❖ **eProcurement for Delegate Agencies:** OBMGMU@cityofchicago.org **or** (312) 744-0358
- ❖ **Up to Date Training Materials (PDF Documents and Videos): Training Material**

Delegate Agency iSupplier Presentation

CITY OF CHICAGO DELEGATE AGENCY

iSupplier (eProcurement) Grant Writing and Online Bidding Workshop

Grant Writing and iSupplier Agenda

❖Grant Writing Tips

❖Overview of iSupplier (eProc)

❖iSupplier Registration
  ❖Updating Organizational Information
  ❖Uploading Documentation

❖RFP ('Creating a Quote') and RFP Addendums

Grant Writing Tips

Grant Writing Tips – Proposal Development

Designed to Provide Helpful Tips and Recommendations for Grant Writing

- Read the Funding Announcement (RFP) Carefully and Ensure Alignment with Organization's Mission and Goals - Understand the Organizations Needs

- Thoroughly Review the Proposal and Incorporate a Team Approach for Development and Review

- Ensure that the Organization Has the Capacity to Implement/Execute and Accomplish Program Goals and Secure Executive/Board Approval (as required)

- Conduct an Analysis of the Need, Cost Benefit, Resources, Current Organizational Structure, and Fiscal Capabilities

- Ensure Capability to Comply with Fiscal, Programmatic Requirements, Long Term Compliance Requirements

- Clearly define services to be provided directly or through partnerships/linkage agreements with other agencies that are appropriate to achieving desired outcomes

Grant Writing Tips – Proposal Development

- **"Tell the Story"** with the Narrative and Budget and Write Convincingly/ Persuasively - Present a logical solution to a problem.

- **Demonstrate** that the Organization Understands the Request and Can Meet the Need of the Granting Agency
  - Understand the Funder's Needs and Target Population & Challenges

- **Research** to ensure that the program is a good fit for the organization's mission/goal/needs

- Provide **Statistics** when Possible and Necessary and Best Practices

- **Highlight** strong national or local evidence base that aligns with best practices for the relevant program

- **Demonstrate** an effective approach to identifying and retaining program participants

- Show the **Value the Organization will Bring** to the Project; Identify Key Staff Responsible for Completing the Proposal
  - Experience
  - Staffing
  - Partnerships
  - Knowledge-base
  - Fiscal Capacity

Grant Writing Tips – Proposal Development

- Basic/Major Areas of a Proposal:
  - Overview of Organization and Mission Statement
  - Problem Statement
  - Proposed Solution
  - Cost and Justification
  - Goals and Objectives
  - Proposal Details
  - Impact/Results/Outcomes
  - Implementation Timeline
  - Risks and Challenges
  - Collaborations/Partnerships
  - Tracking Tools and Systems
  - Resources and Capabilities

Grant Writing Tips – Proposal Development

- Demonstrate Financial and Administrative Capacity to Execute a City Contract

- Prepare a Responsible Budget with Current Job Descriptions and Resumes

- Review Budget and Provide Appropriate Justification for Expenses

- Ensure Budget and Narrative are Consistent and All Figures Tie-Out

- Provide Realistic and Obtainable Objectives/Outcomes/Goals

Grant Writing Tips – General Reminders

- Establish the Timeline and Work Backwards to ensure Timely Submission –
  - Project Planning/Resources/Required Documents/ Certifications
  - Do Not Procrastinate Wait to Draft and/or To Submit
  - Set Calendar Alerts
  - Use an Outline and Checklist

- Participate in All Technical Assistance and/or Webinar Session - Ask Questions/Take Notes

- Use Calculating Software to Minimize Human Error

- Spell Check

Grant Writing Tips – General Reminders

- ✓ **Start Early/Log In**
- ✓ Organize Concepts
- ✓ Write persuasively
- ✓ Follow the RFP and Supplemental Details as Instructed
- ✓ Provide Strong Content and Concise
- ✓ Use Correct Grammar
- ✓ Complete All Requirements and Fields
- ✓ Double Check Prior

to Submission – Internal Control and Quality Control Review
- ✓ Review the Evaluation Criteria and the Associated Weights/Scoring Value
- ✓ Be Honest/Forthright
- ✓ Use a Checklist
- ✓ Attend Pre-Conference
- • Ensure All Required Attachments are Submitted

- • Letters of Support, Resumes, Graphs/Charts, Previous Results, etc.
- • Name Attachments Properly with Consistent Format/Style Titles and Header References (as Necessary)
- • Leverage calculating software
- ✓ **Submit Before or On Time**

iSupplier/eProcurement Overview

What is iSupplier (eProcurement)?

- New <u>Real-Time</u> Online Purchasing System with Data Export

- ***Replaces Existing Processes and Systems***

- **<u>Required</u>** for Doing Business with City of Chicago

- Full Service System Allows Agencies to:

| Manage Delegate Agency Info. | Review & Respond to Solicitations | Submit RFP | Submit Vouchers for Payment | Communicate with Departments |

General Functions and Roles

Delegate Agency
- **Register Organization**
- **Maintain Organization Information in iSupplier**
- **Research RFP Solicitations and Submit Proposals**
- **Create and Submit Payment Requests**

DPS
- **Register Delegate Agencies in iSupplier**

OBM
- **Manage Delegate Agency eProcurement Process**
- **Provide Technical Assistance and Training**

Delegate/Grantee Department
- **Develop and Manage RFPs and Programs**
- **Provide Program-Specific Technical Assistance and Training**
- **Review Vouchers for Processing**

Finance
- **Process Payments**

iSupplier Site

❑ **Registration**
❑ **Finding and Responding to RFP's**
❑ **Training Information and Alerts**

HTTP://WWW.CITYOFCHICAGO.ORG/EPROCUREMENT

LOGIN/REGISTER   CURRENT BIDS   ONLINE TRAINING MATERIALS   SIGN UP FOR DPS ALERTS

Registration and Requirements

All vendors must have:

- Federal Employer Identification Number (FEIN)
- IRS W9 for registration and confirmation of vendor business information.
- **Vendor Names <u>MUST MATCH </u>Articles of Incorporation**

> **<u>New Delegates /Grantee </u>** *and* **<u>Existing Delegate Agencies</u>**
>
> https://www.cityofchicago.org/city/en/depts/dps/isupplier/vendor-registration.htmli

iSupplier Portal

eProcurement

Home   **Login and Registration**   **Current Bids and Solicitation Opportunities**   **Online Training Materials**   **Delegates**   **Help**

Vendor Registration

There are TWO separate processes for registration as a vendor in the City's iSupplier Portal. It is important that your firm determines which process you should follow and that you read all the instructions below.

Existing City of Chicago Vendors

If your business has previously registered with the City, had a contract (excluding subcontracts) or received a payment from the City, your firm should follow the process directly below. The following are **NOT** included in this group:

- Vendors who have only had contracts with Sister Agencies, as opposed to with the City of Chicago. Contracts with the following Sister Agencies would not qualify for previous registration with the City of Chicago:
    - Chicago City Colleges
    - Chicago Housing Authority
    - Chicago Park District
    - Chicago Public Schools
    - Chicago Transit Authority
    - Metropolitan Pier & Exposition Authority (MPEA)
    - Public Building Commission
- Vendors who have done business only with Cook County, but not with the City.

In order to register your business in the City of Chicago iSupplier Portal, you will need to send an email to eProcSupport@cityofchicago.org with the subject **"Request an iSupplier Invitation",** or click on the button below. Within two business days, you will receive an e-mail invitation from the City that provides a link to the iSupplier website and instructions for filling out and submitting your registration.

REQUEST iSUPPLIER INVITATION

How to register after receiving registration invitation

New Vendors with the City of Chicago

Vendors who have never previously registered with the City of Chicago, never received a payment from the City of Chicago or never had a contract with the City of Chicago should follow this process. Click the New Vendor Registration button below; it will take you to the registration page in the iSupplier Portal where you can complete the process.

*If during registration you receive an error message stating that a supplier with the same name or the same FEIN number already exists, your business already has a City vendor number and you should follow the above **"Registration for Existing City of Chicago Vendors"** process.*

NEW VENDOR REGISTRATION

How to Register

In either case, if more than one person at your business will use iSupplier, please add them as "contacts" and check "Create User Account For The Contact" next to each contact. This will create separate iSupplier login accounts for each user.

NEW USER REGISTRATION ONLY

Basic Information — Company Details — Additional Information — Attachments

Prospective Supplier Registration

* Indicates required field

Step 1 of 4 **Next**

Welcome to the City of Chicago iSupplier Registration portal. Here you can register for an iSupplier login account. Upon approval by the City, you will have access to iSupplier to respond to bids, RFPs and RFQs and to view orders and payments from the City.
1. Please enter the full legal name of your company. Your FEIN is required.
2. Your email address will become your login user ID.
3. The system times out after approximately 30 minutes of inactivity, so please click "Save for Later" after each screen to avoid losing your work.

Company Details

At least one tax id is required to be able to complete the registration request.

* Company Name [   ]

Tax Country [   ] 🔍
Where provided, the tax country will be used to validate the format of the Tax Registration Number and/or Taxpayer ID.

* FEIN [   ]
Format: XX-XXXXXXX

DUNS Number [   ]

Contact Information

At least one contact is required for your company. Additional contacts may be added on the next page.

* Email [   ]

* First Name [   ]

* Last Name [   ]

* Phone Area Code [   ]

* Phone Number [   ]
Format: XXX-XXXX

Phone Extension [   ]

ISUPPLIER PORTAL OVERVIEW

Login

- Self Management – Password Resets

iSupplier Homepage

Main Menu:

- **1** Invoice Creation
  - Contracts
  - View Payments and Create Vouchers
- **2** Respond to RFP

Worklist:

- RFP Draft
- Online Messaging
- Addendum Updates/Notification

iSupplier Portal

- **Home**: Main Menu
- **Orders**: All History of Approved Contracts and Releases **(Real-time)**
- **Admin:** Agency Contact Information, Addresses, and Document Uploads
- **Finance:** View Vouchers, View Payments, and Create Invoices **(Real-time)**

*Actual Copies of Contract and Payment Information are Only Available for Items Initiated in iSupplier (eProcurement)

Admin Portal

General Requirements

All Delegate Agencies are required to upload and maintain an active status for the following documents in the iSupplier portal:

- Articles of Incorporation
- Insurance
- SAM Registration Status
- State Good Standing Letter
- Board of Directors
- Financial Statements (updated annually)
- Signature Authorizations
- Cost Allocation Plan *(if indirect cost is included)*

BIDDING – RFP REVIEW

iSupplier Online Bids

Delegate Agency

View and Respond to RFP

View All Attachments

Solicitation Number

Respond to RFP

Respond to RFP

Title SMOKING CESSATION SERVICES FOR ADULTS

Cancel   View RFQ   Save Draft   Continue

Time Left **402 days 16 hours**
Bid Opening Date/Supplier Response Due Date **31-Aug-2018 10:57:45**

Header **Lines**

Supplier **KWM PAINTS**	Quote Valid Until
RFQ Currency **USD**	(example: 24-Jul-2017)
Quote Currency **USD**	Reference Number
Price Precision **Any**	Note to Buyer

Attachments

Add Attachment...

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

Requirements

Expand All | Collapse All

Focus Title		Target Value	Quote Value
⊟ Requirements			
⊟ Contact			
	First Name		4,000 Text character Limit
	Last Name		

Respond to RFP

Electronic Signature

Addendums and Notifications

- Addendum - Solicitation Number will be amended with a (zzzz,**1**)

Helpful Reminders

- Administration of Organizational Information – Maintain Updated and Accurate Information

- *Avoid clicking the Back/Forth browser buttons – Navigate through iSupplier site*

- *Updating Agency Information and User Access – Remember to Enter Email Address Before Granting Access to Organizational Users .*
  - *Assign Proper Responsibilities (Online bidding and/or Invoicing)*

Helpful Reminders

- Online Discussion Sent to Buyer Only

- Save Draft Often

- Check Attachment Submissions Prior to Submitting RFP

- Click Validate Prior to Submission - To Identify Missing Requirement

- Prior to Submitting – **Enter Name First <u>THEN</u> Click Certify**

Who to Contact for Assistance

- **Questions on Registration:**

  eprocsupport@cityofchicago.org

- **eProcurement for Delegate Agencies:**

  OBMGMU@cityofchicago.org or (312) 744-0358

- **Training Materials (Documents and Videos):**

  https://www.cityofchicago.org/city/en/depts/dps/isupplier/online-training-materials.html

Useful Links

City of Chicago Search Online:
http://webapps.cityofchicago.org/VCSearchWeb/org/cityofchicago/vcsearch/controller/agencySelection/begin.do

Vendor/Delegate Agency Registration:
https://www.cityofchicago.org/city/en/depts/dps/isupplier/vendor-registration.html

Funding Opportunities:
https://www.cityofchicago.org/city/en/depts/dps/isupplier/current-bids.html

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CITY OF CHICAGO DELEGATE AGENCY

iSupplier (eProcurement) Invoice Creation Workshop

Agenda

❖Welcome and Introduction

❖Overview of iSupplier (eProc)

❖Invoice Creation - Walk Through
  ❖View Orders and Releases
  ❖Invoice Creation/Vouchering
  ❖View Payments

What is iSupplier (eProcurement)?

- New <u>Real-Time</u> Online Purchasing System with Data Export

- ***Replaces Existing Processes and Systems***

- **<u>Required</u>** for Doing Business with City of Chicago

- Full Service System Allows Agencies to:

| Manage Delegate Agency Info. | Review & Respond to Solicitations | Submit RFP | Submit Vouchers for Payment | Communicate with Departments |

General Functions and Roles

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DPS

- **Register Delegate Agencies in iSupplier**

OBM

- **Manage Delegate Agency eProcurement Process**
- **Provide Technical Assistance and Training**

Delegate Department

- **Develop and Manage RFPs and Programs**
- **Provide Program-Specific Technical Assistance and Training**
- **Review Vouchers for Processing**

Finance

- **Process Payments**

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*Actual Copies of Contract and Payment Information are Only Available for Items Initiated in iSupplier (eProcurement)

INVOICE CREATION

Create Invoice Details

City of Chicago iSupplier Portal with Invoice Creation

1. Select "City of Chicago iSupplier Portal with Invoice Creation."

Create Invoice Details (Cont.)

2. Once you have the PO/Release information, click on the "**Finance**" tab at the top of the screen. In the upper (and lower) right hand side of the Finance tab click the "**Go"** button to create an invoice with a PO/Release

Create Invoice Details (Cont.)

3. Enter the PO/Release information, click the "**Go"** button to create an invoice with a PO/Release

Create Invoice Details (Cont.)

4. The next screen will show all of the available lines on this agreement (PO/Release). Based on what you are vouchering for, **check the box** next to all the lines that apply. 0005 Personnel; 0044 Fringe Benefits; 0100 Operating Expenses, etc. Once the appropriate boxes have been checked, click on the **"Next"** button.

Create Invoice Details (Cont.)

4. Enter Required Invoice Information (See Next Page for Details):

Create Invoice Details (Cont.)

5. Review and Submit Invoice

The next two screens are a chance for you to review and revise your invoice (if needed) before submitting it.

Create Invoice - Attachments

<p style="text-align:center; color:red">Add Required Supporting Documentation</p>

1. ___Invoice Forms___: include Invoice Summary, Invoice Salary Expenditure Only, and Invoice Non-Personnel Expenditure Form (___Excel version only___).
  a. Enter "Invoice" in the Title section
  b. Attach Invoice copies

2. ___Supporting Documentation "Support"___: e.g., Payroll Register Form, Invoice copy for non-personnel cost, etc.
  a. Enter "Support" in the Title section
  b. Attach supporting documentation copies

3. ___Certifications:___ e.g., Voucher Certification Form, Tax Payment Certification Form, etc.
  a. Enter "Certificate" in the Title section
  b. Attach certification copies

Create Invoice Details (Cont.)

Remit To: Verify that the remit-to address and bank account detail for your institution is correct. It can be changed by selecting a different "remit to" site.

Invoice Number: This field is identified as a unique number assigned for tracking and billing purposes and applied in the system to avoid duplication of invoices.

        a. **Conventional invoice** number consists of four elements: PO number-Release number-Expenditures covered year (2 digits)-Sequential number (2 digits), e.g., 33328-1-17-01.

        b. **eProcurement invoice** number omits the PO number, and consists of three elements: Release Number-Expenditures covered year-Sequential number, e.g., 45672-17-01.

Invoice Description: Enter the period covered followed by the two letter program code. For example: **08/01/2017 – 08/31/2017 PH**. PH stands for "Public Health" program; RW stands for "Ryan White" program; SH stands for "Shelter" program; CC stands for "Childcare Program" YN stands for "Youth Net" program. If you do not know the program code, you may just enter the period covered with no program code.

Date Goods/Services Received: This will be the end date of the expenditure covered period in the format DD-MMM-YYYY. We recommend choosing the day from the calendar selector. Example:

Date Good/Services Received 31-Aug-2017

Department Number: You can select the magnifying glass to see a list of department numbers, but common departments are: 41 Department of Health; 48 Mayor's Office for People with Disabilities; 50 Family and Support Services; 54 Planning and Development; 57 Chicago Police Department; 70 Business Affairs and Consumer Protection.

Remove Lines from Invoice

Remove Lines from Invoice

Cancel Invoice

- Search for All Invoices, Under **Finance** tab, Select **"GO"**

- Cancelling an Invoice will release the funds reserved in the voucher

Cancel or Edit Invoice (Cont.)

- Invoice History will appear; Select the Invoice to Edit or Cancel

Cancel or Edit Invoice (Cont.)

Cancel Icon →

Post Invoice Submission

Delegate Agencies have an obligation to regularly check the invoice status and take an appropriate action accordingly.

Post Invoice Submission (cont'd)

A. Rejection

1. Under the following circumstances, an Invoice may be Rejected:

      a. Incorrect Payment Site selected

      b. Incorrect Date Goods/Services Received

      c. Incorrect Release matched

      d. The expenditures covered in the two-year period

      e. Other

2. Delegate Agencies have an obligation to follow up with the Rejection Notification and take an appropriate action to fix the root cause for Rejection accordingly.

3. When delegate agency resubmits the rejected invoice, the original invoice number should be used and followed by a suffix **"R".** For example, **45672-17-01R.**

Major Changes for Current vs. New Contracts

Pre-eProcurement

1. Budget Revisions and Amendments **Must be Sent** via Email to User Department

2. Invoice Number Requirements **Must Have** (PO#, Release#, Year, Voucher#)

3. Invoice Description **Must Have** Program Suffix (i.e. "CR" for Community Receiver)

Post-eProcurement

1. Budget Revisions and Amendments **Must be Sent** via Online Discussion

2. Invoice Number Requirements **Must Have** (New Release#, Year, Voucher#)

3. Invoice Description **Must Have** Program Suffix (i.e. "CR" for Community Receiver)

Helpful Tips and Lessons Learned

1. Use Internet Explorer Browser and Avoid Back/Forth Browser Buttons

2. Enable Pop-Ups and Check Internet Security Settings

3. Check Email Spam/Junk Mail box for City of Chicago Mailer notifications

4. Check Attachment Submissions Prior to Submitting

5. Online Discussion Sent to Buyer Only

6. Save Draft Often

7. Check Attachment Submissions Prior to Submitting RFP

8. Click Validate Prior to Submission - To Identify Missing Requirement

9. Prior to Submitting – Enter Name First THEN Click Certify

10. Updating Agency Information and User Access – Remember to Enter Email Address Before Granting Access to Organizational Users .
    Assign Proper Responsibilities (Online bidding and/or Invoicing)

Who to Contact for Assistance

City of Chicago Search Online:

http://webapps.cityofchicago.org/VCSearchWeb/org/cityofchicago/vcsearch/controller/agencySelection/begin.do

Vendor/Delegate Agency Registration:
https://www.cityofchicago.org/city/en/depts/dps/isupplier/vendor-registration.html

Funding Opportunities:
https://www.cityofchicago.org/city/en/depts/dps/isupplier/current-bids.html

Useful Links

City of Chicago Search Online:

http://webapps.cityofchicago.org/VCSearchWeb/org/cityofchicago/vcsearch/controller/agencySelection/begin.do

Funding Opportunities:

https://www.cityofchicago.org/city/en/depts/dps/isupplier/current-bids.html

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