Viewing and Responding to Solicitations

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Audience: Bidders and/or Suppliers who would like to respond to a State of Ohio solicitation.
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If you have questions or need additional assistance, please contact Ohio Shared Services Contact Center via email (OBM.SharedServices@OBM.ohio.gov) or phone (877-644-6771).
Overview: Viewing and responding to solicitations at the State of Ohio can be broken down into four main tasks:

1. **View a Solicitation:** There are two ways for Bidders and Suppliers to view solicitations:
   1. **Bidder/Supplier Invitation:** When the State of Ohio sends out a solicitation to specific Bidders and/or Suppliers for bidding, they will receive a notification via email inviting them to respond within Ohio|Buys.
   2. **Public Solicitations Page:** Bidders and Suppliers can navigate to the Public Solicitations Page to view all active public solicitations. In order to participate and submit a response, Bidders and Suppliers must log in to Ohio|Buys.

2. **Send Inquiries:** Ohio|Buys allows Bidders and Suppliers to submit inquiries and correspondence to the State. Bidders and Suppliers should submit all clarifications, Q&A, and negotiations using Ohio|Buys.

3. **Submit a Response:** Once a Bidder or Supplier has reviewed a solicitation and accepted the associated Terms & Conditions, they will have the ability to provide responses to the questions within the Questionnaire and Item tabs and submit their response. Upon submitting a response, the user who submitted the response will see a confirmation message stating that the bid has been submitted with the associated time stamp. The Bidder or Supplier will also be able to view their response history at any time.

4. **Amend and/or Withdraw a Response:** If the State issues an amendment (i.e., a new round), Bidders and Suppliers will be required to acknowledge receipt of the amendment and re-submit a response to remain under solicitation consideration. In addition, Bidder or Suppliers also can withdraw a response and remove it from being considered for award.
Key Terms

Solicitation Types in Ohio|Buys:

- **Simple Solicitation**: Solicitations that allow State agencies to create and distribute Requests for Information (RFI) and Requests for Quotes (RFQs).
- **Single Envelope**: Solicitations in which Bidders and/or Suppliers are instructed to submit all aspects of a response in a single envelope.
- **Double Envelope**: Solicitations in which Bidders and/or Suppliers are instructed to submit both technical and financial responses in two separate and sealed envelopes.
- **Triple Envelope**: Solicitations in which Bidders and/or Suppliers are instructed to submit technical, financial, and mandatory responses in three separate and sealed envelopes.
- **Quick Quote**: A quick quote is a simplified short-term solicitation process.
- **Public Notice**: Notifies the public of a solicitation that will be evaluated and awarded outside of Ohio|Buys.

Key Terms:

1) **Sourcing Project**: Any kind of sourcing event in Ohio|Buys. This includes all types of solicitations, as well as Quick Quotes. Sourcing projects can have multiple lots and/or rounds.

2) **Lots**: A new lot is typically issued for Bidder and/or Supplier clarifications. Lots can be used to clarify information or separate the different needs for a specific solicitation. For example, a procurement user may wish to separate a solicitation for a conference into different lots. One lot could be created for food, while another could be created for IT equipment.

3) **Rounds**: A new round is typically issued whenever there is amendment to the original solicitation or when you want to issue a second round of bidding for a shortlisted group of Bidders and/or Suppliers.

4) **RFx**: A solicitation in Ohio|Buys that is composed of lots and rounds. An RFx is always associated to a Sourcing Project; a Sourcing Project may have multiple RFx's associated to it.
VIEWING A SOLICITATION

Overview

• **What’s Covered:** Navigating to the Public Solicitations page to review open solicitations.
• **Roles:** Bidders and/or Suppliers
• **Used When:** A Bidder or Supplier would like to review a solicitation in Ohio|Buys.
Step-by-Step Instructions for Viewing a Solicitation

1. Navigate to the Ohio|Buys Public Solicitation page:

2. On this page, you can search by Keywords, Commodities, Solicitation Status, Contracting Entity, Solicitation Dates, MBE Set Aside status, Solicitation Type, Solicitation ID, and Awarded status. Enter your search terms in the appropriate field and click the **Search** button.

3. Search results are displayed below. Once you have found the solicitation you would like to review, click the **Pencil (    )** icon next to the solicitation name.

4. Review the details of the solicitation. Depending on the type of solicitation, solicitation details may be shown across a variety of tabs:
   1. **Solicitation Overview:** provides general information regarding the solicitation such as the name, dates, type, status, and summary. All solicitation documents are also available on this tab.
   2. **General Questionnaire:** lists any general questions that are being to Bidders and/or Suppliers as part of this solicitation.
   3. **Financial Questionnaire:** lists any financial questions that are being to Bidders and/or Suppliers as part of this solicitation.
   4. **Technical Questionnaire:** lists any technical questions that are being to Bidders and/or Suppliers as part of this solicitation.
   5. **Items:** lists the goods and/or services that are being requested as part of this solicitation.

5. If you would like to respond to this solicitation and/or submit clarifying questions. Click the **Participate in RFx** button at the top of the page and log in with your Ohio|ID and password. If you are a new Bidder, you are also able to register by clicking this button. For additional details regarding accessing Ohio|Buys, please refer to the Bidder and Supplier Learning Guide.
SENDING INQUIRIES

Overview

- **What’s Covered**: Using Ohio|Buys to send inquiries to the State regarding a solicitation as well as how to review the inquiry history for a solicitation
- **Roles**: Bidders and/or Suppliers
- **Used When**: A Bidder or Supplier would like to submit a clarifying question to the State regarding a solicitation
How to Send Inquiries

Step-by-Step Instructions for Sending Inquiries for a Solicitation

Some solicitations in Ohio|Buys will allow for potential Bidders and/or Supplier to submit inquiries regarding a solicitation. To determine if a solicitation allows for inquiries to be submitted, search the solicitation on the View Public Solicitations page and look at the Inquiry Cutoff column in the search results. If there is a value in this column, inquiries can be submitted for that solicitation until that date and time.

1. Log in to Ohio|Buys. From the Main Menu Navigation Bar, click Sourcing and then select View Public Solicitations from the drop-down menu.

2. On this page, you can search by Keywords, Commodities, Solicitation Status, Contracting Entity, Solicitation Dates, MBE Set Aside status, Solicitation Type, Solicitation ID, and Awarded status. Enter your search terms in the appropriate field and click the Search button.

3. Search results are displayed below. Once you have found the solicitation you would like to review, click the Pencil (✏️) icon next to the solicitation name.

4. Please note, if you were invited to participate in solicitation, you can view the details of that solicitation by clicking on the hyperlink listed in the email you received. In addition, the Manage Proposals page will display any solicitations that you have been invited to respond to.

If you haven’t previously viewed this solicitation, review the details across the various tabs and then click Participate in RFx.
How to Send Inquiries

Step-by-Step Instructions for Sending Inquiries for a Solicitation

If applicable, review the Acknowledgement window and then click **I Agree**. Please note not all solicitation types will require you to make this acknowledgment.

Navigate to the **Inquiries** tab.

The complete inquiry history for the solicitation is displayed. All questions and responses for a solicitation are posted publicly and will not be reported individually. To compose a new inquiry, click **Compose**.

⚠️ To search for an existing inquiry, scroll through the message history or enter a keyword into the **Search** field, then click **Search**. Click on the desired line item within the message history to view its details.
Complete all of the required fields. The fields marked by a red asterisk (*) are required. Once you are done, click **Send** to send the inquiry to the State.

▲ All responses will be posted publicly meaning all Bidders will see the question and answer. It is up to the Supplier that posed the question to proactively review the solicitation details in order to check for answers during the Q&A period. All answers will be visible on the **Solicitation Overview** tab within the given solicitation.
SUBMITTING A RESPONSE

Overview

- What’s Covered: Responding to questionnaire(s) and item grids in Ohio|Buys, uploading supporting documents, and formally submitting a response to a solicitation
- Roles: Bidders and/or Suppliers
- Used When: A Bidder or Supplier would like submit their response to a solicitation
How to Submit a Response

Step-by-Step Instructions for Submitting a Response to a Solicitation

1. Log in to Ohio|Buys. From the Main Menu Navigation Bar, click Sourcing and then select View Public Solicitations from the drop-down menu.

2. On this page, you can search by Keywords, Commodities, Solicitation Status, Contracting Entity, Solicitation Dates, MBE Set Aside status, Solicitation Type, Solicitation ID, and Awarded status. Enter your search terms in the appropriate field and click the Search button.

3. Search results are displayed below. Once you have found the solicitation you would like to review, click the Pencil (✏️) icon next to the solicitation name.

   ▲ If you were invited to participate in solicitation, you can view the details of that solicitation by clicking on the hyperlink listed in the email you received. In addition, the Manage Proposals page will display any solicitations that you have been invited to respond to.

4. If you haven’t previously viewed this solicitation, review the details across the various tabs and then click Participate in RFx.
Step-by-Step Instructions for Submitting a Response to a Solicitation

5. If applicable, review the Acknowledgement window and then click I Agree. Please note not all solicitation types will require you to make this acknowledgment.

6. To submit a response, you must complete all of the required fields indicated by a red asterisk (*) on the Your Response Information tab as provide responses on the Item, and General/Technical/Financial Questionnaire tabs as applicable. As you enter information for your response, be sure to click the Save button at the top of the page to save your work.

▲ For Public Notice Solicitations you will not submit your response in Ohio|Buys. Review the solicitation details and follow the listed instructions on how to submit your response offline.

Manage my Team: If you would like to collaborate with other members of your organization to respond to a solicitation, you can add them as team members on the Manage My Team tab.

1. To add an existing contact, select the contact from the Select Contact drop-down menu and click Save.

2. To add a new contact, click Create a new contact, populate the required fields, and click Save & Close. To invite the new contact to log in to Ohio|Buys and create an Ohio|ID, click the Key (🔑) icon next to their name.
Step-by-Step Instructions for Submitting a Response to a Solicitation

Your Response Information tab:

a) Enter the **Response Name**. If desired, select the applicable **Response Type** (e.g., Main Response or Alternate Response) and enter a corresponding **Description** for your response.

b) As you complete your response, upload supporting documents in the **Technical Envelope - Supplier Technical Documents** and **Financial Envelope - Supplier Financial Documents** sections of this tab. If your response contains confidential information and/or you would like to upload a redacted version of your response, upload your redacted response here, in addition to your un-redacted version.

c) Once you are done with populating this tab or you would like to proceed with completing another tab, click **Save**.

▲ Depending on how the solicitation was set up, the Response Information tab may look similar to the Financial/Technical Questionnaire tabs and contain a list of requirements and questions that need to be responded to. Please refer to the **corresponding section of this guide** for details on how to respond to requirements and questionnaires.
**Item tab:** The items associated with the solicitation are displayed in a grid. To submit a response:

a) Enter responses for each of the listed fields. The fields displayed will vary depending on the solicitation.

   1. **Add Comments and Attachments** for each line item as necessary. The Comments field is where you should indicate the State contract number your quote is referencing (as applicable).

   2. Note that depending on your screen resolution you may need to scroll to the right to see these fields. Review Manufacturer and SKU Number fields where available.

b) If desired, you can also download the displayed item grid into an Excel spreadsheet, fill in your responses in Excel, save the file, and upload the completed grid to Ohio|Buys. To do this:

   1. Click **Download in Excel 2007-2010 format (xlsx)**.

   2. Open the corresponding Excel spreadsheet that was downloaded to your computer and follow the instructions contained in the spreadsheet.

   3. After you have completed the spreadsheet, save the file and then upload it into Ohio|Buys by clicking on the **Click or Drag to add a file** button on the corresponding tab you are trying to populate.

c) Once you are done with populating this tab or you would like to proceed with completing another tab, click **Save**.
Step-by-Step Instructions for Submitting a Response to a Solicitation

Depending on the solicitation, you are able to submit a response for an alternate (yet comparable) good/service or to add a line item for shipping/freight costs if needed. Please review the solicitation documents to see if the State will accept alternate items and if so, click the **Plus** icon in the answer grid.

Complete the following fields:

1. **Code**: this automatically populates with a unique identifier for the item being added. Update this field to inform the State you are adding an alternate item or freight costs.

2. **Label**: Enter a detailed description of the item being added.

3. **Click Save & Close**.

Once you have added an alternate item or a line item for shipping/freight costs enter the required information.

▲ Note that depending on your screen resolution you may need to scroll to the right to see these fields.
Financial/Technical Questionnaire tabs:

a) Enter responses for each of the questions listed on these tabs. The answers you enter on this tab will be saved as they are entered.

▲ You are able to click the Access Questionnaire button to have Ohio|Buys navigate you to the first unanswered question.

b) If desired, you can also download the displayed questionnaire into an Excel spreadsheet, fill in your responses in Excel, save the file, and upload the completed grid to Ohio|Buys. To do this:

1. Click Download in Excel 2007-2010 format (xlsx)
2. Open the corresponding Excel spreadsheet that was downloaded to your computer and follow the instructions contained in the spreadsheet.
3. After you have completed the spreadsheet, save the file and then upload it into Ohio|Buys by clicking on the Click or Drag to add a file button on the corresponding tab you are trying to populate.

c) Once you are done with populating this tab or you would like to proceed with completing another tab, click Save.
How to Submit a Response

Step-by-Step Instructions for Submitting a Response to a Solicitation

Once you have entered all of the necessary information, click **Validate & Submit Proposal**.

Click **Submit my Proposal**.

Do you really want to submit your response?

Once an offer is submitted, it cannot be modified. You will only be able to create a new one.

- 11 / 15 items have been filled.
- 20 / 20 questions have been filled. (Technical Section)
- 2 / 2 questions have been filled. (Financial Section)
- 17 document(s) have been attached to the proposal. (Questionnaires)
- Total number of attached documents: 17

After your response has been submitted, you will receive email notifications regarding any updates for the solicitation.

If the State issues an amendment (i.e., a new round), you will be required to acknowledge receipt of the amendment and re-submit a response to remain under solicitation consideration. Please refer to the Amending and/or Withdrawing a Response section of this learner guide for details on how to copy a previous response and submit a revised response as part of an amendment.
AMENDING AND/OR WITHDRAWING A RESPONSE

Overview

- **What’s Covered**: Amending and/or withdrawing previously submitted response
- **Roles**: Bidders and/or Suppliers
- **Used When**: A Bidder or Supplier would like to amend a previously submitted response as part of a solicitation amendment or withdraw a response from consideration
How to Amend and/or Withdraw a Response

Step-by-Step Instructions for Amending and/or Withdrawing a Response

1. Log in to Ohio|Buys. From the Main Menu Navigation Bar, click Sourcing and then select Manage Proposals from the drop-down menu.

2. The Manage Proposals page is displayed. On this page, you can enter a variety of search terms to search for solicitations. Enter search terms in the Keywords search field and then click Search.

3. Search results are displayed below. Once you have found the solicitation you would like to review, click the Pencil (✏️) icon next to the solicitation name.

4. Navigate to the History tab.
How to Amend and/or Withdraw a Response

Step-by-Step Instructions for Amending and/or Withdrawing a Response

5

A summary of your previously submitted responses for the solicitation are displayed. To view the full details of a response click the associated Proposal hyperlink.

6

Copying a Response: If the State issues an amendment (i.e., a new round), you will be required to acknowledge receipt of the amendment and re-submit a response to remain under solicitation consideration. To begin the process of submitting a response for an amendment, we recommend using the copy functionality if you have already submitted a response to an earlier round of the solicitation.

a. Select Copy an Existing Proposal from the Other Actions drop-down menu.

b. Click the Copy an existing proposal (       ) icon next to the proposal you want to copy.

c. Click OK. The selected response has been copied into a new draft response. Make the desired updates and submit the revised response.

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Withdrawing a Response:

a. From the History tab of a solicitation, select Withdraw from the Proposal Actions drop-down menu for the response you would like to withdraw.

b. Click Save.

c. The submitted response has been withdrawn from consideration. If you have submitted multiple responses for a solicitation, you will need to individually withdraw each response if you want all of the responses to be withdrawn. Lastly, all response withdrawals need to occur prior to the Bid Due Date for a solicitation.
## Version Control

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