Overview of the HHS Online Bid Room

Welcome
Texas Health and Human Services (HHS) wants to make doing business with us easier. The HHS Online Bid Room will give you an easier way to submit a bid for an open solicitation. Use it to submit a response to a solicitation for the Health and Human Services Commission, the Department of State Health Services, the Department of Family and Protective Services, and the Texas Civil Commitment Office.

Use of the HHS Online Bid Room is not mandatory. You may still submit a bid on an open solicitation through traditional means as specified in the solicitation package (e.g., mail or in-person delivery).

Dual Registration
Using the HHS Online Bid Room requires registration with two systems:

1. The HHS Enterprise Portal (If you are already registered with the Enterprise Portal, you do not need to register again.)
2. The HHS Online Bid Room

This is similar to having to log in to your cell-phone, then having to log in separately to an application on your cell phone.

It is recommended that you register early if you intend to use the HHS Online Bid Room to give you adequate time to complete the registration process and timely submit a bid response.
Table 1: Credential Summary

<table>
<thead>
<tr>
<th>What are they?</th>
<th>Enterprise Portal Credentials</th>
<th>HHS Online Bid Room Credentials</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>This is the username and password you use to log in to the Enterprise Portal. The Enterprise Portal is where you access the HHS Online Bid Room.</td>
<td>This is the username and password you use to log in to the HHS Online Bid Room. The HHS Online Bid Room is where you actually submit your bid(s) for open solicitations.</td>
</tr>
<tr>
<td>How do I get them?</td>
<td>You must register for the Enterprise Portal <a href="#">here</a>.</td>
<td>• If you are notified of an open solicitation, you will receive these credentials automatically in a separate email. • If you are not notified of an open solicitation and choose to register for the Enterprise Portal on your own, you will receive these credentials <em>after</em> your registration for the Enterprise Portal is approved.</td>
</tr>
</tbody>
</table>
### Enterprise Portal Credentials

| When do I get them? | You select your username when registering for the Enterprise Portal. You will receive a temporary password after your registration is approved. |

### HHS Online Bid Room Credentials

| You will receive an email with your username and password; the email will come automatically in one of two ways: |

1) If you’ve received a notification to bid on an open solicitation, you will receive a separate email with these credentials.

2) If you’ve registered for the Enterprise Portal without receiving a notification to bid on an open solicitation, you will receive these credentials when your registration for the Enterprise Portal is approved.

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### Accessing the HHS Online Bid Room

#### Enterprise Portal

In order to access the HHS Online Bid Room, you must first register with the HHS Enterprise Portal. This is the online system through which you access the HHS Online Bid Room.

#### Accessing the Enterprise Portal — Notified Bidders

If you are indicated as a potential bidder on a solicitation, you will receive an email notifying you when a new event — in other words, an open solicitation — has been posted.
Within this email will be a link to the Enterprise Portal.

Newly Implemented Vendor Responses Portal Instructions:

HHS implemented CAPPS Financials Supplier Portal system to facilitate vendors to register and submit response online. Below are some high-level steps:

First time Supplier Portal users:

- Click Register button using the ENTERPRISE PORTAL LINK (HHS Eversector Portal Registration) to complete a one-time registration process.

HHS Enterprise Portal - Registration

Enterprise Portal Link

Please keep in mind, vendors who have not done business with HHS and registering in the Enterprise Portal for the first time, expect up to 5 business days.

Once you have gained access to Enterprise Portal, you can log into CAPPS Financials Supplier Portal to enter responses and submit attachments online. The Additional information for Supplier Portal can be accessed from training link HERE:
Selecting the link will take you to the Enterprise Portal landing screen where you will be able to register.

**Accessing the Enterprise Portal — Non-Notified Bidders**

If you’ve not received an email notifying you of a solicitation, you can access the Enterprise Portal landing screen directly via the [HHSC Enterprise Portal website](https://www.hhsc.state.tx.us/enterprise).  

**Registering with the Enterprise Portal**

To begin your registration, select “Register.”
Select the fourth option, “I represent a business or organization responding to an HHSC, DFPS, DSHS, OIG, or TCCO solicitation using the HHS Online Bid Room.”

Then select “Next.”

Add a username.
If you see a green check next to your username, the name is available. If you see a red x, someone has already taken that username and you will need to pick a different one.

Next, add your first and last name and optional middle name and suffix. **Make note of the spelling and spacing in your first and last names (e.g. JoAnne versus Jo Anne, and Delacruz versus De la Cruz) as you will need to enter this name in a later step exactly as entered here.**
Next complete the required email address, phone number, city, state, zip code, county and company name.

Next, indicate if you’ve received credentials (a username and password) for the HHS Online Bid Room. This is explained further on page 19.

Add days and times you can be reached, should the HHS staff need to contact you for any reason regarding your registration.

Finally, add your Taxpayer Identification Number (TIN) – an 11-digit number – or Federal Employer Identification Number (FEIN, nine-digit number). Double-check that the number
you’ve entered is accurate, as this will ensure timely processing of your Enterprise Portal registration.

For security purposes, you will need to complete the CAPTCHA. You will be presented with either a set of numbers to enter, or a math problem to solve.

If you would like a new CAPTCHA, select the refresh button.

Then select “Next”.
Upon successful completion, you will receive a confirmation message alerting you to next steps. The message reads:

You're almost done! You will receive a message with additional details and instructions, so you may complete your registration for the HHS Online Bid Room.

If you have done business with the HHS System in the past, you should receive an email within a few minutes. If you do not receive an email, please check your junk folder as the email may have been directed there. Be sure to add the email identitymanagement@hhsc.state.tx.us to your "safe senders" list to ensure all future HHS Enterprise Portal emails are delivered directly to your inbox. (Click Here for instructions on how to add email addresses to your safe senders list.)

If you have not done business with the HHS System, you may have to wait up to five (5) days to receive additional instructions along with your username and password. If you don't receive this information in five (5) days, please send an email to pcsbids@hhsc.state.tx.us.

Select “Done”.

This will take you back to the Enterprise Portal landing screen.

**Enterprise Portal Notification**

When your registration has been approved, you will receive a notification from identitymanagement@hhsc.state.tx.us. **This could take up to five business days.**

Included in this email is your username and a temporary password.
Logging in to the Enterprise Portal for the First Time

Enter your username and temporary password on the Enterprise Portal landing page.
Then select “Sign In.”

The first time you log in, you will be asked to read the Acceptable Use Agreement. You must demonstrate that you have reviewed the entire agreement by scrolling to the bottom before you will be able to move forward.
Once you have reviewed the Acceptable Use Agreement, you must check the box acknowledging that you have read and understood the agreement, and that you agree to comply with its terms.

You must then sign your first and last name. The first and last name you sign must match the first and last name as provided when you registered for your account.
Then select “Next.”

You will then be asked to select a new password. Your new password must adhere to the password rules listed on the screen. If the password does not meet one of the rules, you will see a red x next to that rule. Otherwise, you will see a green check.
Once you’ve successfully selected a new password, select “Next.”

On the next screen you will see the information you provided when you signed up for your account. Scroll to the bottom and select “Next.”
Online Bid Room

The Online Bid Room is where you will actually bid on open solicitations.

Accessing the HHS Online Bid Room

Your credentials (username and password) for the Online Bid Room will arrive at one of two times.

If You Have Received a Notification About an Open Solicitation

If you’ve received a notification about an open solicitation, your credentials for the Online Bid Room will arrive in a separate email, but at the same time as this notification. Please note that this means you will receive these credentials before you’ve actually registered for access to the Enterprise Portal. You will want to be sure to save this email in a safe place.

If You Have Not Received a Notification About an Open Solicitation

If you have not received a notification about an open solicitation, you will receive your credentials for the Online Bid Room after you have registered with the Enterprise Portal and your credentials for the Enterprise Portal are approved.
Getting to the HHS Online Bid Room

Once you are logged in to the Enterprise Portal, select “HHS Online Bid Room” from the left-hand menu.

This will take you to the sign-in page for the HHS Online Bid Room. Enter your HHS Online Bid Room user ID and password.
Then select “Sign In.”

Logging in to the HHS Online Bid Room for the First Time
Setting Your Security Question for Password Recovery

The first time you log in to the HHS Online Bid Room, you will be asked to set your security question for password recovery. Select “Set security question for password recovery.”
Then select a question from the dropdown and enter a response. You will need to remember this response in the event that you need to recover your password.
Select “OK” to return to the previous screen.
HHS Online Bid Room Acknowledgement Document

The first time you log in to the HHS Online Bid Room you will also be asked to acknowledge the Terms of Agreement for the HHS Online Bid Room. Select “Acknowledgement for use of the HHS Online Bid Room.”

A new screen will pop-up. Review the Acknowledgement, then select “OK.”
Once you’ve selected “OK,” ensure the checkbox next to “Acceptance of the Acknowledgement Document” is selected.

Finally, enter your first name and last name, then select “Submit.”
Registering a New Bidder for your Business

When logged into the HHS Online Bid Room, you have the option to register additional bidders for your business.

On the top menu, select “Manage Events and Place Bids.”

Then select “Register Bidder.”
Select whether you are registering an individual or a business.

Then select “Next.”
Enter Your Tax Identification Number and Entity Name. If you like, enter a website URL, which is optional.

Then select “Next.”
Next, enter a primary mailing address.

On the next screen, you will have the option to add contact information by selecting “Add Contact.”
Select the type of contact you are adding from the drop-down menu.

You can also indicate that this is the primary contact by selecting the check-box labeled “Primary Contact.”
Once you’ve finished entering the contact information, select “OK.”

When you’ve finished adding the required information, select “Next” until you reach step 6, “Categorization.”
Here, you will have the option to select categories that apply to your business. If categories selected here match the categories you’ve registered for through the Centralized Master Bidder list, you will receive notifications when a new bid event is available for your kind of business.

Select “Next.”
On the next screen, to review the information you’ve submitted, select “Review.”

You can then review the Terms of Agreement by selecting “Terms of Agreement.” These are the Terms of Agreement you will have reviewed when logging in to the Online Bid Room for the first time. At this point, you are confirming these Terms of Agreement for the employee you are registering.
You’ll then need to select the check box to indicate that you accept the Terms of Agreement.

Ensure that the email address for the employee which you are registering is correct in the field labeled “Email communication regarding this registration will be sent to:”
Finally, select “Submit.”

Managing Your Bidder Profile

To manage your bidder profile, begin by selecting “Manage Events and Place Bids.”
Then select “My Bidder Profile.”

Leaving the values defaulted, select “Search.” The system will take you to your company’s profile.
Changing Your Company Name

Under the “Main” tab, revise your company name as you’d like it to appear.

Then select “Save.”
Changing Your Company Address

Select the “Addresses” tab.

Leave the “Main Address” selected, as this is the address you can change.
Next, update the address.

Then select “Save.”
Changing Company Contacts

To change company contacts, begin by selecting the “Contacts” tab.

Select the contact type from the drop-down menu.

Then enter the updated contact information.
Finally, select “Save” to save the updated contact information.
### The Online Bid Room Environment

#### The Online Bid Room Work Center

The Work Center is broken up into four tabs: Work Center Instructions, All Open Bid Events, Account Management and Links.

<table>
<thead>
<tr>
<th>Tab Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Center</td>
<td>Contains general instructions for using the Online Bid Room.</td>
</tr>
<tr>
<td>All Open Bid</td>
<td>Displays all open bid events.</td>
</tr>
<tr>
<td>Account Management</td>
<td>Allows users to manage their account information.</td>
</tr>
<tr>
<td>Links</td>
<td>Provides links to other related pages and resources.</td>
</tr>
</tbody>
</table>

#### Work Center Instructions

The Work Center Instructions tab outlines general instructions for using the Online Bid Room. These are instructions for using the Online Bid Room as a whole, not for individual solicitations.
All Open Bid Events

The All Open Bid Events tab lists all open bid events. The name of each bid event is a hyperlink that, if selected, will take you to the primary bid screen for that event.
## Account Management

The account management screen allows you to set security questions in the event that you forget your password. It also lets you change your password.
Setting Security Questions

To set security questions, begin by selecting “Set security question for forgotten password hint.”

Select a question from the drop-down menu.
Once you’ve selected a security question, enter a response. You will need to use this response if you forget your password and need to have it reset.
Once you’ve entered your response, select “OK” to save and return to the previous screen.

### Changing Your Password

To change your password, you will need to enter your current password, followed by your new password twice for confirmation purposes. Once you’ve entered your new password, selecting “Change Password” will save it.

### Links

The links tab provides a list of useful links. Please note: the links listed in the Online Bid Room may vary slightly from the image below.
Hiding or Showing the Work Center Tabs

To hide or show the tabs in the Work Center, select the small double-headed arrow, which will minimize the tabs to the left.
You can maximize this window by selecting the arrow again.

### Searching

#### Searching for Events

The Online Bid Room offers a variety of ways to search for events — in other words, solicitations — and to locate additional information to then bid on those events.

#### Accessing the Search Screen

To access the search screen, select “Search for public or other invited events to bid on” from the Work Center home screen.

You can then enter search criteria to begin your search for events.
**Searching by Event ID or Event Name**

If you know the event identification (ID) or event name of the event for which you’re searching, you can enter that information into the appropriate search field and select “Search.”

![Image of View Events and Place Bids interface]

**Searching by Wildcard Topic**

Wildcard searches allow you to search for solicitations that pertain to a particular topic by using the “%” symbol around the topic. For example, to search for all events that pertain to food, you would enter “%food%” into the event name field, which would then pull up all events with the word “food” in the name.
Saved Search Criteria
Creating a Saved Search

To save search criteria, select “save search criteria.” This will allow you to enter a name for your search criteria, which you can then access at a later time.
Enter an easily recognizable name for your search criteria.

Then select “Save” to save your search.
Accessing a Saved Search

To access a saved search, select the search you want from the “Use Saved Search” drop-down menu.

Then select “Search” to conduct the search from your saved criteria.
Managing Saved Searches

To manage your saved searches, select “Manage Saved Searches.”

Then check the box next to any search(es) you wish to delete.
Then select “Delete.”

Advanced Search Criteria

Selecting “Advanced Search Criteria” allows you to search for events based on time period, item description, or National Institute of Governmental Purchasing (NIGP) class code.

To search by date, select a start-date range and/or an end-date range.
To search by item description, enter a description of the item in the appropriate field. Keep in mind that, the more criteria you enter, the more limited your search will be,
potentially removing an item you wish to see from your results if the criteria is not entered properly.

To search by NIGP class category, enter the category directly, or select the magnifying glass to search for the code you wish to search for.
Once you’ve located the NIGP class category you wish you use, select it to add it to your search criteria.
To add additional rows for NIGP class categories, select “Add Additional Category,” which will add a new row.

To remove one or more categories, mark the check box next to the row(s) you wish to remove, then select “Remove Selected Category.”
Bidding

Once you’ve located the event on which you want to bid, you can go to the Event Details screen by selecting the hyperlinked event ID.

Event Details Screen

The Event Details screen is the landing screen for the event. From there, you will access information about the event and bid on the event if you choose.

Included on the Event Details screen are the following:

- Event Name: the name of the event from the Electronic State Business Daily (ESBD)
- Event ID: the event ID from ESBD
- Event Format/Type: Invitation for Bid (IFB), Request for Proposals (RFP), Request for Applications (RFA), Request for Offers (RFO), or Request for Quotation (RFQ)
- Event Round: the round of posting for this particular event
- Event Version: the version of this particular event, which changes if the event is amended
- Event Post Date: date the event was posted
- Event End Date: date the event closes
- Supplier Question Due Date: due date of any questions about the event

In the upper right-hand corner of the Event Details screen are the following links:

- Upload XML Bid Response: a page to allow you to upload a bid response for an Invitation for Bid (IFB) solicitation in XML format (the XML Bid Response tab is not applicable to any other solicitation format). This allows you to upload a bid response in XML format. This functionality is described further on page 86.

- View/Edit Saved and Submitted Bids: a page to allow you to view and edit your saved and submitted bids, described further on page 83.
In the center of the Event Details screen is contact information for the event, plus information on whether you can edit bids for this event or submit multiple bids.

**View the Event Package**

To view the event package (all solicitation attachments), select “View Event Package.”
This will open up a list of all of the event attachments.
To download a particular attachment, select “View” from the list next to that particular attachment.

If you are using Google Chrome, this will launch the attachment download automatically.
If you are using Microsoft Explorer, it will ask if you want to view or save the attachment.
Bidding on an Event

When you are ready to bid on an event, select “Bid on Event” on the Event Details screen.

You will receive a message asking you if you want to default the bid quantity for each line item to be equal to the requested quantity. If you select “Yes,” the bid quantity for each line item will be defaulted to the requested bid quantity. If you select “No,” the bid quantity for each line item will not be defaulted. Your response as “Yes” or “No” is applicable to IFB only. For RFP, you can respond as “No.”

After selecting “Yes” or “No,” you will be taken to the screen where you can submit your response to the solicitation. The top of the screen will indicate the total number of general event questions, the number of questions that are required, and the number of questions you’ve completed.
Under Event Questions, you will see required questions marked with a star. In the event that there is an ideal response, you will see the question noted with a gold icon with a red star.

Respond to the questions using the appropriate method (drop-down menu, open-entry text box, etc.).

**Adding Comments or Attachments**

For some questions, you can also add comments or attachments to enhance your response by selecting “Add Comments or Attachments.”

Acceptable attachment file formats are: Microsoft Word, Project, and Excel; PDF, JPEG and XML. Note that maximum file size for each attachment is 250 MB.
To upload a file to be used as an attachment, select “Upload.”

From the pop-up box that appears, select “Choose File.”
Select the file you wish to upload.

Then select “Open.”
Next, select “Upload.”

Add a meaningful description to your attachment so that the HHS purchaser knows what it is.
To add additional attachments, first select “Add New Attachments.”
This will create a new row for which you can add attachments using the instructions above.

To delete a row, whether it contains an attachment or not, select “Delete.”
You will receive a confirmation message. If you would like to proceed with the delete, select “OK.”
To add comments, enter your text into the open-entry text box.
When you are ready to return to the primary bid screen and save your changes, select “OK.”

Adding Quantities and Prices (for IFB only)

If you selected “Yes” to default to the requested quantity for each item, the quantity will be completed for each line in on the bid screen. Otherwise, you will need to add the quantity you are proposing.
### Event Questions

**Bid Required**

**Ideal Response Required**

#### Enter Response Here

- Can you meet the indicated completion date of 08/14/19

#### Add Comments or Attachments

### Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

- **Lines in This Event:** 13
- **Lines Responded To:** 0
- **Your Total Line Pricing:** 0.0000 USD

#### Hide Line Detail

**Bid Required**

**Line Comments/Files**

<table>
<thead>
<tr>
<th>Lines</th>
<th>Personalize</th>
<th>Unit</th>
<th>Quantity</th>
<th>Your Bid Quantity</th>
<th>Your Unit Bid Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Apple Pie</td>
<td>CS</td>
<td>384.0000</td>
<td>384.0000</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Lemon Pie</td>
<td>CS</td>
<td>560.0000</td>
<td>560.0000</td>
<td></td>
</tr>
</tbody>
</table>
Pay careful attention to the unit type (case, box, etc.).

Add your unit bid price for each item. Again, this is the price for each unit, not for the total amount.
The total amount, which will be the unit price times the total units, will automatically calculate in the column labeled “Your Total Bid Price.”
Choosing Not to Bid on an Item

Some solicitations allow you to opt out of bidding on a particular item. If you don’t want to bid on a particular item, select the check box next to that line item in the column labeled “No Bid.”
Validating Entries

When you’ve completed the information for your bid, select “Validate Entries.” The system will check to ensure you’ve completed all required components of your bid.
If there are items to correct, you will receive a message telling you to see the message(s) at the top of the page. Select “OK.”

The message(s) will alert you to any item(s) you need to complete.
It is recommended that after you correct the error(s), you validate again. When there are no errors found, you will receive a message stating “No errors found.”

Saving a Bid

If at any time you need to leave your bid but are not ready to submit, simply select “Save for Later.”
You will receive a notification letting you know that your bid is not complete. By selecting “OK,” you will be able to save your bid for submittal at a later time.

Make note of the event ID so that you can easily locate the bid later.

It is recommended that you review your submitted bid immediately after submitting it in order to identify and correct and bid response issues.

Accessing a Saved Bid

To access a saved bid, begin by locating the event, either by searching for the event using the name or event ID, or by locating the event under the “All Bid Events” tab from the Work Center home screen.
Select the event you wish to access from the list or from your search results.

Then select “View/Edit Saved and Submitted Bids.”

This will open a list of your saved and submitted bids for this particular solicitation.
To view or edit the bid, select “View/Edit.”

This will take you back to the main bid screen for this event with your saved information.

Submitting a Bid

When you are ready to submit your bid for a particular event, select “Submit Bid” from the main bid screen for that event.

You will receive a confirmation that your bid has been submitted. It is recommended that you print a copy of this page for your records.
Using XML to Bid on an Event (for IFBs)

To upload a bid response using XML, you must first download the XML template for the event on which you want to bid.

From the main bid screen for the event, select “View Event Package.”
Locate the XML file from the list and select “View” to download.

If you are using Google Chrome, the attachment will download automatically and appear in the bottom download tray of your browser.
If you are using Microsoft Explorer, it will ask if you want to view or save the attachment.

You can then open the file by right-clicking and selecting “Open with.”
Then select “Excel” from the list.

After opening the spreadsheet, complete the required information.
Then save the spreadsheet, making sure that you do not change the event ID reference in the file name, as the HHS Online Bid Room will look for this ID to associate the file with the correct event. Select File -> Save As -> XML Spreadsheet.

To upload the XML spreadsheet, select “Upload XML Bid Response” from the main bid screen for that event.
Select “Select XML File.”

Select “Choose File.”
Next, select the XML file you completed.

Then select “Upload.”

If the file is successfully uploaded, you will be taken back to the main bid screen for this event. You can then validate and submit your bid.