

## VendRep System Checklist

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

Use this checklist to ensure that all required steps are complete when enrolling your Business Entity in the Office of the State Comptroller (OSC) Online Services, which will allow you to complete and certify an online vendor responsibility questionnaire on the New York State VendRep System. It may be helpful to print this checklist.

Description	Complete
<p><b>Step 1. Enroll in the OSC Online Services</b></p> <p>Go to <a href="https://portal.osc.state.ny.us/wps/portal">https://portal.osc.state.ny.us/wps/portal</a> and click “Enroll Now.” To enroll in OSC Online Services you will need:</p> <ul style="list-style-type: none"> <li>• <b>Vendor Name:</b> Legal Business Name</li> <li>• <b>Vendor ID:</b> New York State Vendor Identification Number</li> </ul> <p><i>Note: The Vendor ID is <u>not</u> the Taxpayer ID Number.</i></p> <p>If you do not currently have a NYS Vendor ID, contact the OSC Helpdesk at 518-408-4672, 866-370-4672 or <a href="mailto:ciohelpdesk@osc.state.ny.us">ciohelpdesk@osc.state.ny.us</a>.</p>	<input type="checkbox"/>
<p><b>Step 2. Create User Password</b></p> <p>You will receive two e-mails from OSC providing instructions for secure access to the New York State VendRep System. Follow the instructions and link provided in the email to create a new password.</p>	<input type="checkbox"/>
<p><b>Step 3. Create Additional Users and Assign VendRep Roles</b></p> <p>To complete and certify a Vendor Responsibility Questionnaire, you must assign each of the following roles to one or more users:</p> <ul style="list-style-type: none"> <li>• Administrator</li> <li>• Contributor</li> <li>• Certifier</li> </ul> <p>You must determine each user’s appropriate role assignment. Any user may have more than one role assigned.</p>	<input type="checkbox"/>
<p><b>Step 4. Log into the VendRep System and complete Basic Vendor Data</b></p> <p><a href="https://portal.osc.state.ny.us/wps/portal">https://portal.osc.state.ny.us/wps/portal</a></p> <p><i>Note: The user must have the "Administrator" role to complete Basic Vendor Data.</i></p> <p>This information determines the type of Vendor Responsibility Questionnaire that is provided to the entity to complete, i.e., For Profit or Not-For-Profit and whether the business entity bids on construction contracts.</p>	<input type="checkbox"/>
<p><b>Step 5. Complete a Vendor Responsibility Questionnaire</b></p> <p><i>Note: The user(s) must have a "Contributor" role to start or answer a questionnaire.</i></p> <p>From either the Summary or Home page, go to the Forms section and select “Start New” to begin answering the questionnaire. Each question in a section must be answered for the section to be complete. When each section is complete, the option to certify the questionnaire will be available at the bottom of the Form Overview page.</p>	<input type="checkbox"/>
<p><b>Step 6. Certify a Vendor Responsibility Questionnaire</b></p> <p><i>Note: The user must have a "Certifier" role to certify the questionnaire.</i></p> <p>The Certifier must review the responses, confirming the information is truthful, accurate and complete. To certify the questionnaire responses, the assigned user clicks the "Certify" button at the bottom of the Overview page and then selects “Certify Responses” to complete the online questionnaire.</p> <p><i>Authorized State contracting entity users will not be able to view the questionnaire until a Certifier has completed Step 6.</i></p>	<input type="checkbox"/>

If there are any questions, contact the OSC Help Desk at 518-408-4672, 866-370-4672 or [ciohelpdesk@osc.state.ny.us](mailto:ciohelpdesk@osc.state.ny.us).