

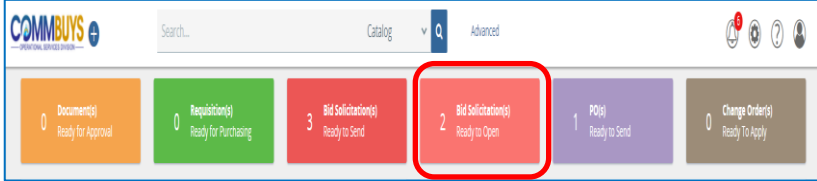

Job Aid: How to Ensure Document Confidentiality

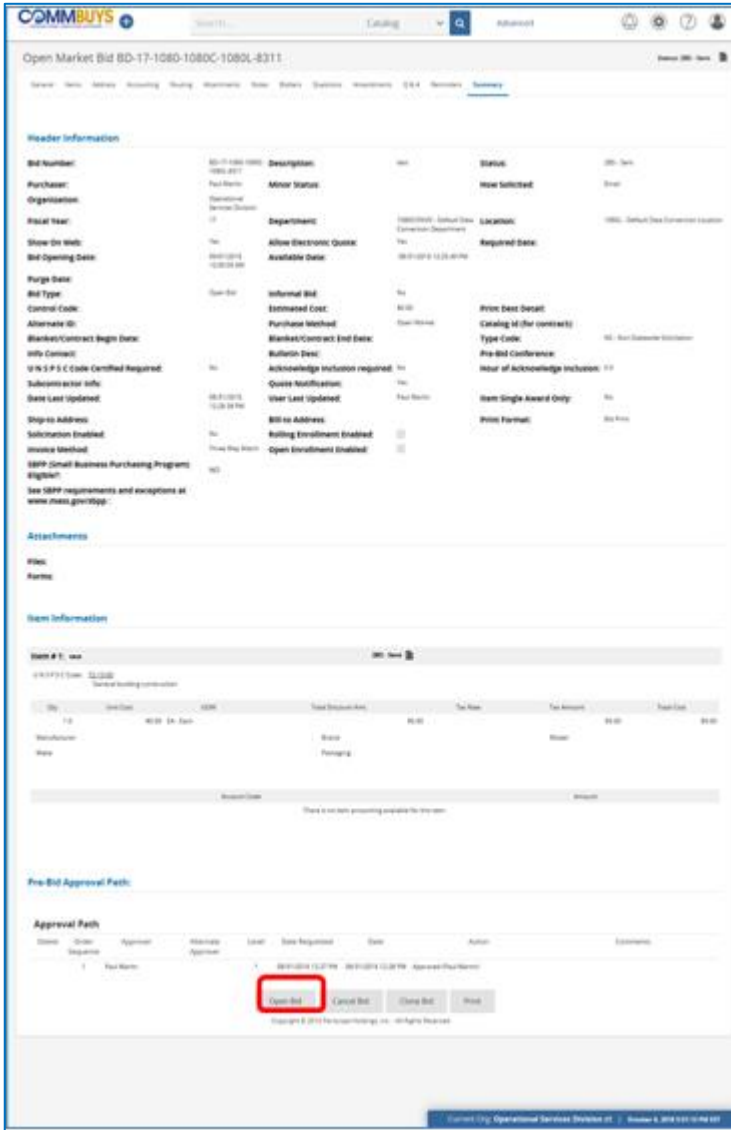
This Job Aid explains how to:

Ensure that confidential vendor documents submitted with quotes do not display publicly after award.

Of Special Note:

Documents submitted with quotes during the bid process normally become part of the public record after award. At times vendors may submit documents with their quote that contain sensitive information. Examples of these documents are: W9, Standard Contract Form, Commonwealth Terms & Conditions, Electronic Funds Transfer (EFT), and Contractor Authorized Signatory Listing. In effect, anything that is not subject to the Freedom of Information Act (FOIA) should not display publicly. Prior to quote submission, vendors should mark these documents as confidential. However, at times they may not. It is incumbent upon the buyer to review all submitted documents and designate any documents that should be confidential as such - prior to bid award or the creation of the Master Blanket Purchase Order (MBPO).

Screenshot	Directions																		
	<p>Step 1: Locating Ready to Open Bids</p> <p>Click on the Bid Solicitation(s) Ready to Open box.</p>																		
 <table border="1"> <thead> <tr> <th>Bid Solicitation #</th> <th>Description</th> <th>Bid Type Code</th> <th>Buyer</th> <th>Dep / Loc</th> <th>Bid Opening Date</th> </tr> </thead> <tbody> <tr> <td>BD-17-1080-1080C-1080L-8311</td> <td>test</td> <td>NS - Non-Statewide Solicitation</td> <td></td> <td>1080CONVD/1080L</td> <td>09/01/2016 00:00:00</td> </tr> <tr> <td>BD-17-1080-1080C-1080L-8310</td> <td>test</td> <td>NS - Non-Statewide Solicitation</td> <td></td> <td>1080CONVD/1080L</td> <td>09/01/2016 00:00:00</td> </tr> </tbody> </table>	Bid Solicitation #	Description	Bid Type Code	Buyer	Dep / Loc	Bid Opening Date	BD-17-1080-1080C-1080L-8311	test	NS - Non-Statewide Solicitation		1080CONVD/1080L	09/01/2016 00:00:00	BD-17-1080-1080C-1080L-8310	test	NS - Non-Statewide Solicitation		1080CONVD/1080L	09/01/2016 00:00:00	<p>Step 2: Locating the Bid</p> <p>Click on the desired blue hyperlink in the Bid Solicitation # column.</p>
Bid Solicitation #	Description	Bid Type Code	Buyer	Dep / Loc	Bid Opening Date														
BD-17-1080-1080C-1080L-8311	test	NS - Non-Statewide Solicitation		1080CONVD/1080L	09/01/2016 00:00:00														
BD-17-1080-1080C-1080L-8310	test	NS - Non-Statewide Solicitation		1080CONVD/1080L	09/01/2016 00:00:00														

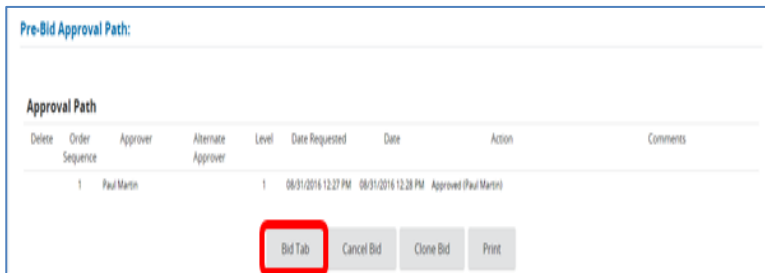


Step 3: Opening the Bid

The bid opens to the Summary page. Scroll to the bottom of the page and click the **Open Bid** button.

Step 4: Opening the Bid Tabulation Screen

The Summary page redispays and note that the bid status changed to 2BO-Opened. Scroll to the bottom of the page and click on the **Bid Tab** button.



Bid Tabulation for Bid #BD-17-1080-1080C-1080L-8311

Quotes Revisions Items Header Questions Subcontractors Routing Attachments Score Summary [Back to Bid](#)

Total Number of Submitted Quotes: 3

Consider All	Quote #	Description	Vendor ID	Vendor Name	Submit Date	Attachments
<input checked="" type="checkbox"/>	QT-1080-1080C-1080L-15757	test	00019974	Acme Services	10/06/2016 06:07:00 PM	No attachments
<input checked="" type="checkbox"/>	QT-1080-1080C-1080L-15758	test	00020012	Kramerica	10/06/2016 06:13:54 PM	Download
<input checked="" type="checkbox"/>	QT-1080-1080C-1080L-15759	test	00020013	Bane	10/06/2016 06:25:51 PM	Download

[Create New Quote](#) [Save And Continue](#)

Step 5: Selecting the Bid

The Bid Tabulation page opens to the Quotes Tab. Click on the **blue hyperlink** in the Quote # column to open the vendor quote.

NOTE: You must repeat the remainder of this process beginning here at Step 5 for each vendor's quote.

Quote QT-1080-1080C-1080L-15759 - Bane

General Items Questions Subcontractors Terms & Conditions **Attachments** Evaluations Preference Reminders Summary

Header Information

Quote #:	QT-1080-1080C-1080L-15759	Bid #:	BD-17-1080-1080C-1080L-8311	Status:	Submitted
Organization:	Operational Services Division	Delivery Days:	0	Discount Percent:	0.0
Description:	test	Alternate Bid:	No	Shipping Terms:	
Bid Flag:	LowBidder	Ship Via Terms:		Payment Term:	
Freight Terms:		Info Contact:		Quote Total:	899.00
Promised Date:		User Last Updated:	Paul Martin	User Created:	Paul Martin
Comment:					
Date Last Updated:	10/06/2016 06:27:58 PM				

Print Format:
Vendor accepts the terms & conditions with no exceptions.

Attachments

Agency Files: W9.docx
Chrysanthemum-8.jpg

Agency Forms:
Vendor Files:
Vendor Forms:

Step 6: Locating the Attachments

Click on the **Attachments** tab.

Quote QT-1080-1080C-1080L-15759 - Bane

General Items Questions Subcontractors Terms & Conditions **Attachments** Evaluations Preference Reminders Summary

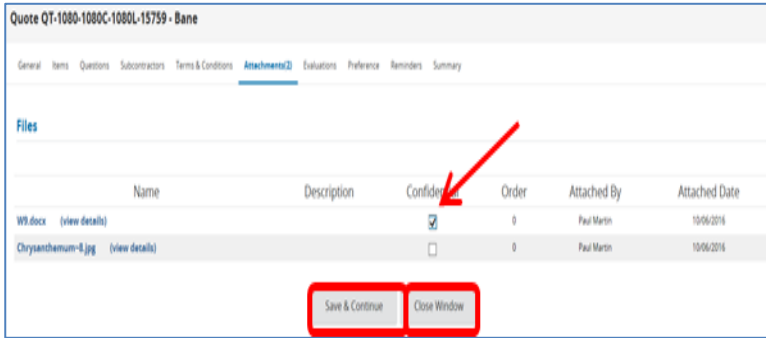
Files

Name	Description	Confidential	Order	Attached By	Attached Date
W9.docx (view details)		<input type="checkbox"/>	0		10/06/2016
Chrysanthemum-8.jpg (view details)		<input type="checkbox"/>	0		10/06/2016

[Save & Continue](#) [Close Window](#)

Step 7: Viewing the Quote Attachments Page

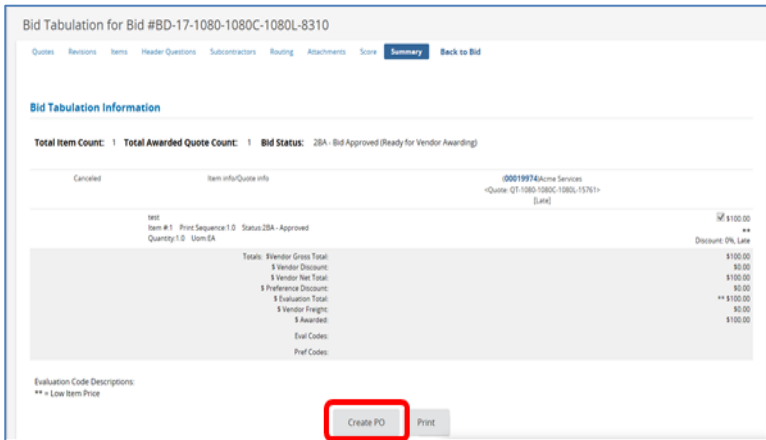
Note the Name and the Confidential columns. Any documents marked confidential will not display publicly. In this example the bidder submitted a completed W9 but did not check the Confidential box.



Step 8: Making the Document Confidential

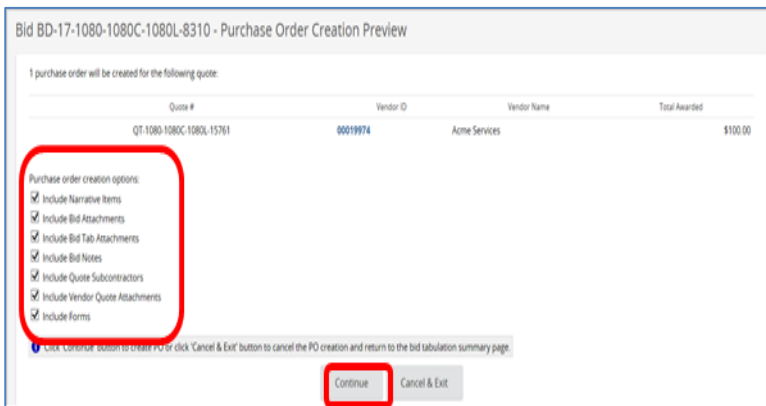
1. Click on the **Confidential** checkbox next to the W9 file
2. Click on the **Save & Continue** button.
3. Click on the **Close Window** button. The bid may now be awarded. Confidential documents will not display publicly.

NOTE: If for some reason a confidential document is not marked as such at this time, the buyer has another opportunity to mark the document confidential. This must be during the creation of the MBPO.



Step 9: Accessing the PO Creation Page

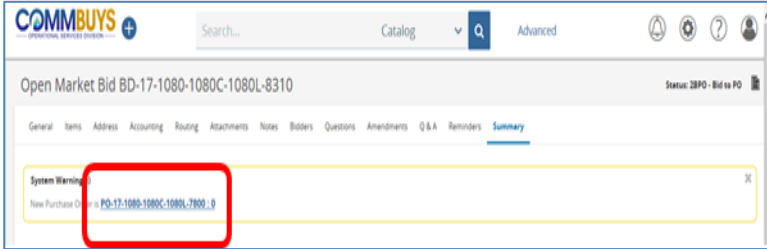
After the award is approved, click on the **Create PO** button.



Step 10: Creating the MBPO

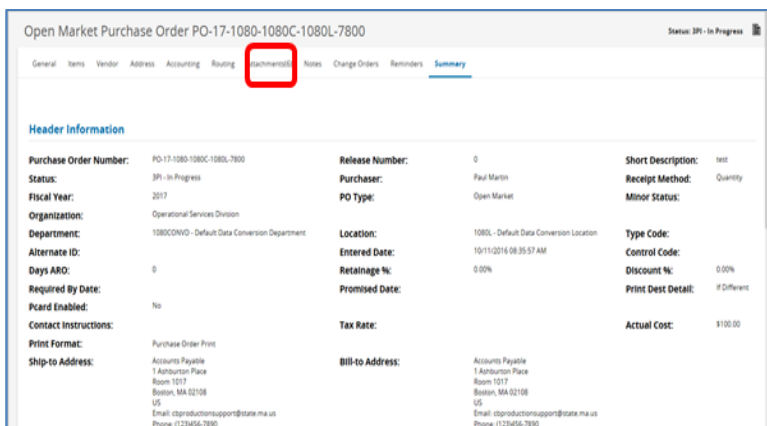
The Purchase Order Creation Preview page displays. Leave all the options checked, then click on the **Continue** button.

NOTE: If any options are unchecked, they will not display in the PO, but you will lose the ability to mark the document confidential. They will display publicly in the quote. If you do not want certain documents included in the MBPO do not uncheck them here. Delete the documents from the MBPO attachment tab.



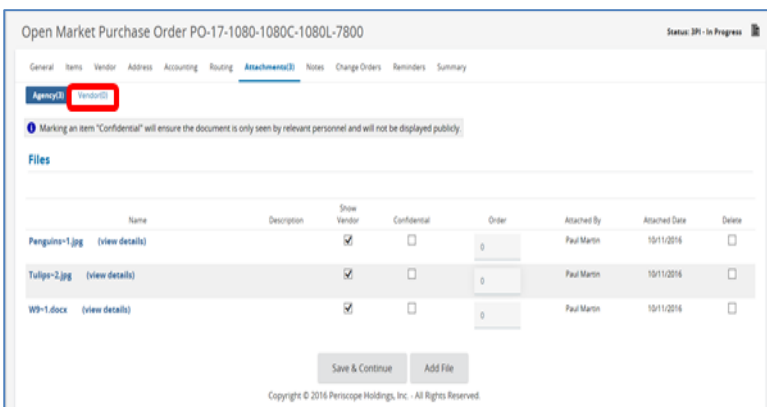
Step 11: Opening the MBPO

The PO has been created. Click on the **blue hyperlink** in the PO# column to open the PO.



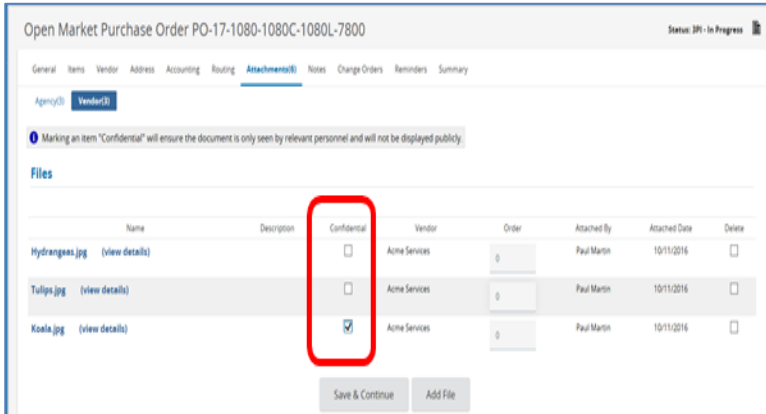
Step 12: Accessing the Attachments

From the PO screen, click on the **Attachments** tab.



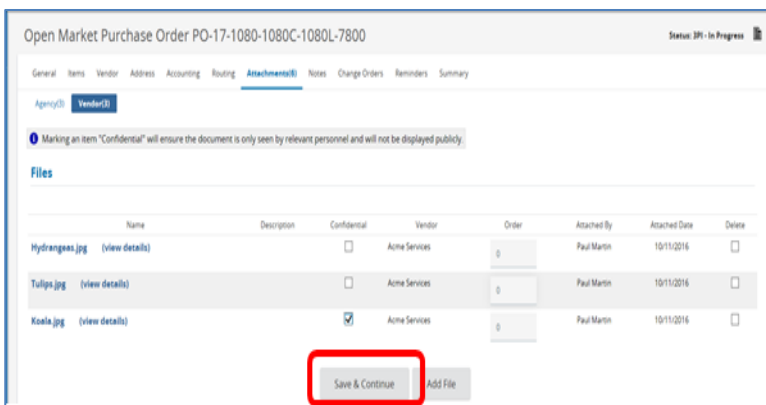
Step 13: Viewing the Attachments

Click on the **Vendor** sub-tab to view Vendor Quote attachments.



Step 14: Making Attached Documents Confidential

Review all the documents and mark confidential as required by clicking the **checkbox** next to the document name in the Confidential column.



Step 15: Saving the Changes

Click on the **Save & Continue** button.