SF Small Business Summit

HELP BECOMING A SUPPLIER

OFFICE OF THE CONTROLLER
How to Become a Supplier

Wednesday, October 5, 2021
Introductions

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How to Become a Supplier
How to Become a Supplier

• The SF City Partner Is the Go-To Site for City Bidders/Suppliers

• What’s the Difference Between a Bidder and a Supplier

• Steps to Become a Registered Bidder

• Steps to Become a Fully Compliant Supplier
  • Complete a San Francisco Business Tax Registration
  • Complete a 12B Equal Benefits Declaration

• Supplier Account Maintenance

• Contact Information
The SF City Partner Website Is the Go-To Site for City Bidders/Suppliers

The URL for this site is https://sfcitypartner.sfgov.org/pages/index.aspx

- This is where you click to Log In or to Register as a New Bidder
- This is where you click to find Contact info, FAQs, Training/Job Aids, and directions on How to Become a City Supplier.
- You can also click here to Register as a New Bidder

How to Become a Supplier

Find an Opportunity
View and Bid on Events

Sign Up
Register your organization to view, place bids with the City.

Notice of Intent
Notice of Intent to Award Bid Proposal [DD/MM/YY]

Partner with the City

Partner with the City

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What’s the Difference Between a Bidder and a Supplier

The City Has 2 Main Vendor Statuses

Becoming a Supplier to the City Is a Two-Tier Process:

1) To become a Registered Bidder, you will need to complete a short registration form (10-15 minutes)

General Public
- Can view nearly all the pages on the SF City Partner website
- Can even see some basic info on bid opportunities…but…
- Cannot log in nor submit any bids

Registered Bidder
- Can view and bid on City business…but…
- Cannot be fully awarded any City business

Fully Compliant Supplier
- Can view, bid, and be fully awarded City business

2) After becoming a Registered Bidder, you can follow the steps to become a Fully Compliant Supplier

You need to become a Fully Compliant Supplier before you can be awarded City business!
What’s the Difference Between a Bidder and a Supplier

The Process of Becoming a Bidder and then a Supplier Is on the SF City Partner Website

First become a Registered Bidder...
The first step to begin working with the City is to complete a short registration process to become a “Registered Bidder”. This will allow you to view and bid on Sourcing Events.

...then Become an Approved Supplier
After becoming a Registered Bidder, you can then advance your status to become an Approved Supplier, which allows you to be fully awarded City contracts. The steps to do this are as follows:

1. Complete a San Francisco Business Tax Registration
2. Complete a LTO Equal Benefits Declaration

In addition to the hyperlinked directions above, you can click here to view step-by-step directions on How to Become an Approved Supplier.

Additional Programs and Forms that may apply to you as you work with the City include the following:

- [Link to additional programs and forms]
How to Become a Supplier

• The SF City Partner Is the Go-To Site for City Bidders/Suppliers

• What’s the Difference Between a Bidder and a Supplier

• **Steps to Become a Registered Bidder**

• Steps to Become a Fully Compliant Supplier
  • Complete a San Francisco Business Tax Registration
  • Complete a 12B Equal Benefits Declaration

• Supplier Account Maintenance

• Contact Information
How to Become a Supplier

Steps to Become a Registered Bidder
Start the Process at the SF City Partner Site

First become a Registered Bidder...
The first step is begin working with the City by completing a short registration process to become a "Registered Bidder". This will allow you to view and bid on upcoming events.

... then become an Approved Supplier
After becoming a Registered Bidder, you can then advance your status to become an Approved Supplier, which allows you to be fully awarded City contracts. The steps to do this are as follows:

1. Complete a San Francisco Business Tax Registration
2. Complete a 1099-Sales Tax Beneficiary Declaration

In addition to the hyperlinked directions above, you can click here to view step-by-step directions on How to Become an Approved Supplier.
Steps to Become a Registered Bidder

Complete Step 1

**BIDDER REGISTRATION**

**Step 1 - Set up Profile**

Select an activity below *

- Start a new registration form
- Continue from where you left

What type of entity do you represent?
- Business
- Individual

What type of bidding activities you are interested in? (Please mark “Selling Goods/Services” or “Both” if you will be selling goods or services to the City)
- Buying Goods/Services
- Selling Goods/Services
- Both

* Indicates Required Field

Back

Next
Steps to Become a Registered Bidder

Complete Step 2

If you are registering as a JV:
- Each JV owner must already be a Bidder or Supplier
- You will need to indicate who the owners of the JV are and their ownership percentages
Steps to Become a Registered Bidder

Complete Step 3
Steps to Become a Registered Bidder

Complete Step 4
Steps to Become a Registered Bidder

Complete Step 5

This link gives access to a list of NIGP codes:
- Product codes go from 00500 to 89800
- Service codes go from 90500 to 99800

Entering your NIGP codes here will help the system automatically notify you of any public bid opportunities for the goods/service you provide.
Steps to Become a Registered Bidder

Complete Step 6

**Step 6 - Terms and Conditions**

Click the "Submit" button to submit your registration after reviewing and accepting following Terms of Agreement.

Email communication regarding this registration will be sent to *

koano.wong@sfgov.org

Select to accept the Terms of Agreement below:

**Terms and Conditions**

**GENERAL DISCLAIMER**

Information presented on this Web site is collected, maintained, and provided for the convenience of the reader. While every effort is made to keep such information accurate and up-to-date, the City and County of San Francisco does not certify the authenticity of information that originates from third parties.

Under no circumstances shall the City and County of San Francisco be liable for any actions taken or omissions made from reliance on any information contained herein from whatever source nor shall the City and County be liable for any other consequences from any such reliance.

**EXTERNAL LINKING POLICY**

Purpose and Disclaimer

The City permits the establishment of external hyperlinks on its official website only if the links strictly comply with this policy. In establishing and maintaining its official website, the City does not intend to create any forum or other means for public discourse. Rather, the sole and limited purpose of the permitted external links is to provide information about the City and its government for residents, businesses, and visitors. The City does not endorse or provide preferential treatment to any third party websites or associated organizations or persons. Additionally, the City does not control third party sites and therefore does not warrant that third party sites are accurate or, reliable, or that they have operational links.

[Submit button highlighted]
Steps to Become a Registered Bidder

What Happens After I Finishing My Bidder Registration? – 1st Email

After Submitting your Bidder Registration Form, you will receive two emails. The first email confirms that you have completed this registration process.

You now have a Bidder Account number.
Steps to Become a Registered Bidder

What Happens After I Finishing My Bidder Registration? – 2nd Email

The second email gives a temporary password and instructions on how to move forward. Please note that this temporary password will only be good for 24 hours.

- Username: IAMTEST004A
- Temporary Password: k8^Phurpf8

If you have any login issues, please contact the City and County of San Francisco Department of Technology at (628) 652-5000 or at OTIS.helpDesk@sfgov.org. Please note that for security purposes, you will need to reset your password every 90 days.

As a Registered Bidder, you can now view and bid on City business opportunities. In order to be fully awarded a City contract, though, you will need to follow through with becoming an Approved Supplier. For information on this process, please go to https://sfcitypartner.sfgov.org/pages/become-a-supplier.aspx.

Thank you,

City and County of San Francisco
Steps to Become a Registered Bidder

The First Time Logging In

1. The first time you log in, you will first need to set up your MFA security.

2. You will then need to log in again to change your password.

3. You will then need to log in again, where you will land on a “MyApps” page. Click the one icon on this page to go to the SF City Partner website.
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Steps to Become a Fully Compliant Supplier

First Complete a SF Business Tax Registration

After becoming a Registered Bidder, you can then go through the steps to become a Fully Compliant Supplier.

• First complete a San Francisco Business Tax Registration
Steps to Become a Fully Compliant Supplier

First Complete a SF Business Tax Registration

1. Complete the Application
   - Once submitted, you cannot change your application. You must complete your application in a single session.
   - Having the following items ready before you begin the application:
     - Federal Tax Identification Number (FEIN, EIN, or TIN)
     - Estimated San Francisco Gross Receipts
     - Estimated San Francisco Payroll Expense
     - Legal name of your business
     - Ownership name(s) & address(es)
     - Address of each location in San Francisco where you do business
   - Business Account Number of the existing business if purchasing or changing structure of an existing business
   - Payment Information (credit card, debit card or checking account information)

2. Sign the Form
   - You will receive an e-mail with instructions on electronically signing the application after it has been submitted.

3. Pay the Business Registration Fee (if applicable)
   - You will receive your Business Account Number immediately by paying online using a check, credit or debit card.

I have read all of the above information.

Continue
Steps to Become a Fully Compliant Supplier

First Complete a SF Business Tax Registration
Steps to Become a Fully Compliant Supplier

First Complete a SF Business Tax Registration
Steps to Become a Fully Compliant Supplier

First Complete a SF Business Tax Registration
Steps to Become a Fully Compliant Supplier

First Complete a SF Business Tax Registration

After you have completed your San Francisco Business Tax Registration:
• It generally takes a few business days for your tax registration to be processed.
• You will then receive an email indicating that you now have a Supplier account although you will still need to attend to your 12B Declaration status.
Steps to Become a Fully Compliant Supplier

First Complete a SF Business Tax Registration

The Treasurer & Tax Collector Help Center can be accessed via https://sftreasurer.org/help-center or via 311 (or 415-701-2311).
Steps to Become a Fully Compliant Supplier

Next, Attend to Your 12B Declaration

Chapter 12B of the Administrative Code requires that all Suppliers to the City and County of San Francisco administer benefits equally to employees with domestic partners and employees with spouses.

12B Equal Benefits Declaration

Chapter 12B of the Administrative Code requires that all Suppliers to the City and County of San Francisco administer benefits equally to employees with domestic partners and employees with spouses. Please click here to log in and submit a 12B Declaration. After your 12B Declaration has been received and processed, you will receive an email from the City’s Contract Monitoring Division.

If you need help with your 12B Declaration, you can click here for step-by-step directions on how to File a 12B Equal Benefits Ordinance Declaration. In addition, further information on the 12B Equal Benefits program, including a directory of 12B compliant firms, can be found on the Contract Monitoring Division website.
Steps to Become a Fully Compliant Supplier

Filing a 12B Declaration

1. **Find an Opportunity**
   - View and bid on events.

2. **Announcements**
   - September 21, 2019:
     - Your login process has changed as of September 21.

3. **My Account**
   - My Categories & Alerts
   - Email in ACT payments
   - Edit my Profile
   - Change Password

4. **My Activity**
   - View Opportunities
   - View My Activity

5. **Certifications**
   - 12B Declaration

6. **Additional Information**
   - View Terms & Conditions

**12B Declaration**

- Find an Existing Value
- Add a New Value

- Declaration Number: NEXT
- Declaration Type: Bidder
- Supplier ID: [Enter ID]
- Bidder ID: [Enter ID]

**Add**
Steps to Become a Fully Compliant Supplier

Filing a 12B Declaration

Fill in, Save, and fully Submit the 12B Declaration form.
Steps to Become a Fully Compliant Supplier

Filing a 12B Declaration

Your Tax ID Number (SS#) will be auto-populated based on your Bidder Registration form.

Be sure to mark a checkbox showing your main Address/Contact in both the Address Information and Contact Information sections.
Steps to Become a Fully Compliant Supplier

Filing a 12B Declaration

SECTION 2: COMPLIANCE QUESTIONS

Question 1: Nondiscrimination - Protected Classes

A. Does your firm agree it will not discriminate against its employees, applicants for employment, employees of the city, or members of the public on the basis of the fact or perception of a person’s membership in the following categories?

- Race, Color, Creed, Religion, National Origin, Ancestry, Age, Sex, Sexual Orientation, Gender Identity (Transgender Status), Domestic Partner Status, Marital Status, Disability, AIDS/HIV Status, Height, Weight

Please note: a YES answer is required for compliance.

B. Does your firm agree to insert a similar nondiscrimination provision in any subcontract you enter into for the performance of a substantial portion of the contract you have with the City?

Please note: You must answer this question even if you do not intend to enter into any subcontracts, and a YES answer is required for compliance.

Question 2: Nondiscrimination - Equal Benefits for (i) Employees with Spouses and (ii) Employees with Domestic Partners and (iii) Employee’s Spouse or Domestic Partner.

Questions 2a and 2b should be answered YES even if your employees pay some or all of the cost of optional or domestic partner benefits.

A. Does your firm provide or offer access to any employee benefits?
   - Yes ○ No ○
   (If your firm does not have any employees, answer NO)

B. If you answered YES to 2A, are all of the benefits equally available to employees with domestic partners and employees with spouses?
   - Yes ○ No ○
   (If your firm does not have any employees, answer NO)

If you answered YES to either or both Questions 2A and 2B, please go to Question 2C.

If you answered NO to both Questions 2A and 2B, please go to SECTION 3.
Steps to Become a Fully Compliant Supplier

Filing a 12B Declaration

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Available To and/or Affects</th>
<th>How Does This Apply to Domestic Partners (DPs) and Spouses (SPs)?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Insurance</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Dental Insurance</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Vision Insurance</td>
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<td>☐</td>
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<td>Pension</td>
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<tr>
<td>Retirement</td>
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<tr>
<td>Bereavement Leave</td>
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<tr>
<td>Family Medical Leave</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>Parental Leave</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Employee Assistance Program</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>Relocation and/or Travel</td>
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</tr>
<tr>
<td>Discounts and/or Savings</td>
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</tr>
<tr>
<td>Credit Union</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>Child Care</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Dependent Life Insurance</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Short-Term Long-Term Disability Insurance</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Long-Term Disability Insurance</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Accident Death &amp; Disability Insurance</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Other</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Union</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

Check all benefits that apply to your answers above and list in the "Other" line any additional benefits not already specified. Note: some benefits are provided to employees because their spouse or domestic partner such as bereavement leave, other benefits are provided directly to the spouse or domestic partner such as dependent life insurance.
Steps to Become a Fully Compliant Supplier

Filing a 12B Declaration

When you have completed your 12B Declaration, 1) click “Save”, then 2) print or download a copy of your 12B Declaration for your records, and finally 3) click “Submit” to submit your 12B Declaration so that it can be processed.

Please note that your 12B Compliance should be updated every three years.
Steps to Become a Fully Compliant Supplier

Filing a 12B Declaration

The Equal Benefits Unit of the Contract Monitoring Division will notify you by email when they have made a compliance determination.

Questions about the 12B compliance process can be directed to the Equal Benefits Unit as follows:

City and County of San Francisco
Office of the City Administrator – Contract Monitoring Division
Equal Benefits Program
1155 Market Street, 4th Floor
San Francisco, CA 94103
(415) 581-2310
CMD.EqualBenefits@sfgov.org

Please Note: The Equal Benefits team is currently working from home. Therefore, the best way to reach them is via email.
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Supplier Account Maintenance

The Supplier Status Section

Once your Supplier Account is set up, you will need to maintain key data on your account
- Certain Issues with Your Account’s Status Will Be Flagged in the Supplier Status Section

This entire section will be hidden if you have no Tax Registration, 12B Declaration, or 12X Headquarters issues.

Tax Registration
- This box will be reddish if your Tax Registration has issues or has an approaching expiration.
- If there are issues, you will find directions here on how to address your issue.
- This box will be green if your Tax Status is fine.

12B Declaration
- This box will be reddish if your 12B Declaration has issues or has an approaching expiration.
- If there are issues, you will find directions here on how to address your issue.
- This box will be green if your 12B Status is fine.
Supplier Account Maintenance

Self-Service Maintenance

Most account data needs to be maintained by you on a self-service basis:

- **User Profiles (Log-On Access):** If your login has Administrator access, you can create new login accounts for your Supplier account or lock out logins to your Supplier account.

- **Contacts:** Contact listings tell the City who we can contact at your organization for account issues, to notify you of bid opportunities, etc. You can add/edit your Contact listings.

- **Addresses:** You can add new addresses to your Supplier account on a self-service basis.

- **My Categories & Alerts:** You can add/edit the NIGP code listings of what goods/services you provide.

- **Enroll in ACH Payments:** You can enroll to be paid by the City via electronic payments. This leads to a registration process with Paymode, our ACH provider.

- **Change Password/MFA:** You can change your password and/or MFA security setup.

Certain account changes have to be requested instead through the use of the Request Account Changes link including the following:

- Changing/Inactivating an Address
- Marking a Contact as Invalid

You can file 12B Declaration and 14B LBE Certifications on a self-service basis.
Supplier Account Maintenance

Job Aids Are Available

Although our goal is to make our system as easy and intuitive as you won't need instructions, we are still providing instructions to help you with certain key activities that you might take. Please click on the appropriate icon below to be taken to the job aids that can help you with your business process.

- Bidder Job Aids
- Supplier Job Aids

Suppliers
- Supplier: Managing Your PeopleSoft Account (9)
- Supplier: Managing Log-In Accounts (User Profiles)
- Supplier: Adding a Supplier Address
- Supplier: Managing Your Alerts, Categories
- Supplier: Managing Your 1099 Tax and Benefits Declaration

Suppliers: Conducting Your Business with the City (7)
- Conducting Your Business With the City in PIFST
- Supplier: Acknowledging a Purchase Order
- Supplier: Viewing Purchase Orders
- Supplier: Viewing Receipts
- Supplier: Reviewing invoices

Other articles
- Supplier: Viewing and Bidding on City Business (5)
- Supplier: Viewing a CMD Participating Report (7)
- Supplier: Viewing a CMD Payment Affidavit Confirmation as a Subcontractor (1)

How to Become a Supplier
The Become a Supplier page on the SF City Partner website has information/links for other forms and requirements that you may need/want to fill in, depending on the status of your business and the nature/volume of your business with the City.
The Contract Monitoring Division (CMD) website also has links to resources and ordinances related to the 12B Equal Benefits Declaration and 14B LBE Certification programs:

12B Equal Benefits Forms & Resources
https://sfgov.org/cmd/forms-resources

14B LBE Certification Forms & Resources
https://sfgov.org/cmd/resources-1

CMD also offers a free monthly webinar on the 1st Wednesday of each month at 10:00 AM about 12B Compliance and Becoming a City Supplier and 14B LBE Certification Eligibility and Benefits.

For further information, you can reach out to:
12B Equal Benefits Compliance at cmd.equalbenefits@sfgov.org
14B LBE Certification at lbecert@sfgov.org
The Treasurer & Tax Collector Help Center can be accessed via [https://sftreasurer.org/help-center](https://sftreasurer.org/help-center) or via 311 (or 415-701-2311).
San Francisco Labor Laws for City Contractors

Minimum Compensation Ordinance (MCO)
https://sfgov.org/olse//minimum-compensation-ordinance-mco
mco@sfgov.org  (415) 554-7903

Health Care Accountability Ordinance (HCAO)
https://sfgov.org/olse//health-care-accountability-ordinance-hcao
hcao@sfgov.org  (415) 554-7903

Fair Chance Ordinance (FCO)
https://sfgov.org/olse/fair-chance-ordinance-fco
fco@sfgov.org  (415) 554-5192

Consideration of Salary History
https://sfgov.org/olse//consideration-salary-history
salaryhistory@sfgov.org (415) 554-6469
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Contact Information

Our User Support Team Is Available to Help!

Live support is available on workdays from 8:30 AM – 5:00 PM via phone and/or email.

We have screen-sharing technology that can be used by a User Support agent.

You can file a User Ticket.

How to Become a Supplier