



**New Jersey Department of the Treasury
Division of Purchase and Property**



Quick Reference Guide:

**Vendor Profile Management
VENDOR FORMS**

Seller Administrator



Table of Contents

1. Purpose	3
2. Instructions	3
2.1 Log into <i>NJSTART</i>	3
2.2 Verify the Seller Administrator Role Is Selected.....	3
2.3 Click on Maintain Organization Information	4
2.4 Click on Maintain General Organization Information	4
2.5 Attachments and Forms Section	5
2.6 Click the Add Form Button	6
2.6.1. Searching for a Form Template	6
2.6.2. Select a Form Template from the Search Results	7
2.6.3. Complete the Online Form.....	8
2.6.4. Save the Completed Online Form	9
2.7 Making a Form Confidential	9
2.8 Deleting or Editing an Existing Vendor Form.....	10
2.8.1. Deleting an Attached Form	10
2.8.2. Select and Open the Form to be Edited	10
2.9 The Link between Some Vendor Forms and Vendor Profile Categories	11



1. Purpose

The State of New Jersey has several forms that are required to be submitted by Vendors {Bidders} as part of every procurement and contracting process. A key feature of **NJSTART** is the elimination of most of the repeated effort associated with preparing and submitting these required forms by allowing Vendors {Bidders} to complete and securely store them online in their **NJSTART** Vendor Profile until they are used to respond to a Bid Solicitation or until they need to be updated. This Quick Reference Guide (QRG): *Vendor Forms*, explains how to complete and save forms into a Vendor Profile.

If you have any questions on what a field means, click on the **question mark icon**  on the top right hand corner of your screen. A drop-down menu will open in your browser, containing the User Manual for the Seller and Seller Administrator roles. To find the section of the manual pertaining to forms, find the **Seller Administration** heading.

QRGs for managing your **NJSTART** Vendor Profile, and many other topics can be found at the New Jersey Division of Purchase and Property Vendor Support Page at <http://www.nj.gov/treasury/purchase/njstart/vendor.shtml>.

If you have questions regarding the material presented in this QRG or maintaining your Vendor Profile, you may contact a New Jersey State Vendor Administrator at (609) 341-3500 or email njstart@treas.nj.gov.

*Note: all forms necessary for a Quote submission are identified in Section 4 of each Bid Solicitation. Forms are either included with the Bid Solicitation as an attachment located on the "Attachments" Tab of the Bid Solicitation page within **NJSTART** or may be found on the Division's website at <http://www.state.nj.us/treasury/purchase/forms.shtml>.*

2. Instructions

The remainder of this QRG provides step-by-step instructions on how to manage your vendor forms using **NJSTART**.

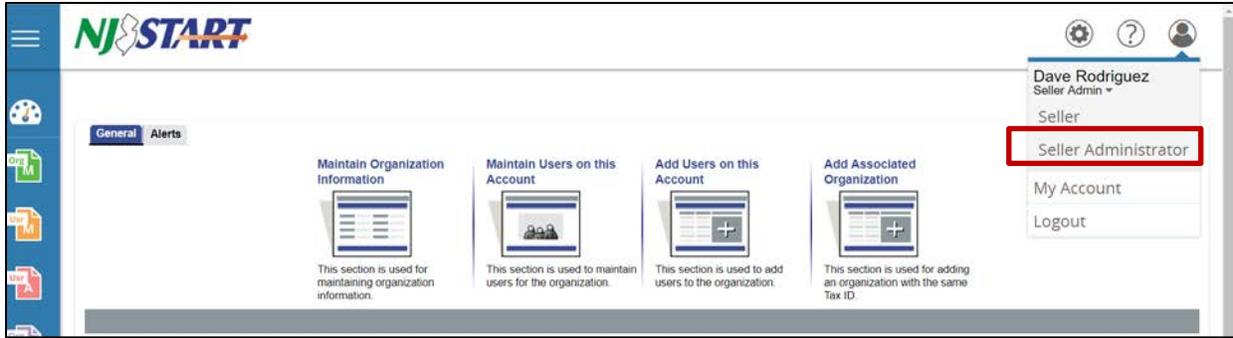
2.1 Log into **NJSTART**

This QRG assumes that you have already registered your company in **NJSTART**. If you have not yet registered, complete the steps shown in the QRG titled "*Vendor Registration*," and then return to this guide. Once you have completed registration, you can log in and make any updates or changes to your information as necessary.

Navigate to www.njstart.gov. Log in using the Login ID and Password you created during registration or that was provided to you by another user in your organization.

2.2 Verify the Seller Administrator Role Is Selected

The activities described in this section require the user to have Seller Administrator privileges. Ensure the Seller Administrator role is selected from the drop-down menu indicated in red in the screenshot on the next page.



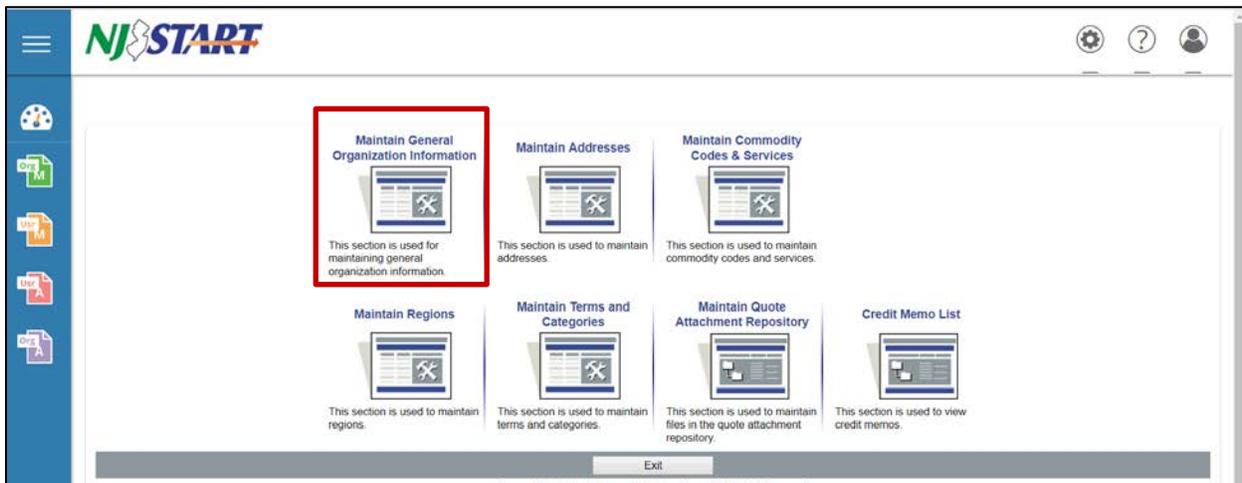
If you cannot select the Seller Administrator tab or see the screen shown above, then you do not have the necessary privileges to perform vendor form management tasks. To remedy this you may request that the necessary privileges (role) be granted to you by your company's Seller Administrator.

2.3 Click on Maintain Organization Information

Once you have logged into NJSTART and are in the Seller Administrator role, you can access all of your organization's information. Click on the **Maintain Organization Information** screen in red below.



2.4 Click on Maintain General Organization Information



The **Maintain General Organization Information** view, shown above, is divided into three sections.



Top Section – General Organization Information: The information recorded in this section was entered during **NJSTART** registration, but may be updated if necessary. It contains your company’s identification information, the nature of your business, and primary means of contacting you via email and phone. The Vendor ID and Tax ID fields cannot be edited.

Middle Section – Attachments: **NJSTART** allows you to attach files, in a variety of formats, to your Vendor Profile using the functionality provided in this section. For more information and instructions on how to attach files to your Vendor Profile, see the QRG titled *Attaching Files*.

Bottom Section – Forms: This is where you will find functionality to access templates for vendor forms, complete them online, and then attach them to your Vendor Profile. You can also edit or delete them.

This key feature eliminates the repeated effort associated with filling out these forms each time you respond to a Bid Solicitation. You can now complete forms online just once and then store them securely as attachments to your Vendor Profile. As long as the information entered on your attached forms does not change, they will always be ready to be attached to a Quote.

When responding to a Bid Solicitation using **NJSTART**, it will now take only a few mouse clicks to attach the completed forms stored in your Vendor Profile to your Quote. Please do not mark any forms in your profile as **Confidential** so they can be viewed by State procurement staff.

2.5 Attachments and Forms Section

The **Attachments** section shown below allows you to upload files in a large variety of formats, including: documents, images, audio and video. Once these are uploaded into your profile they can be downloaded, deleted from **NJSTART**, or attached to Quotes or other records created using **NJSTART**.

Below that, the **Forms** section presents a list of the forms that already have been added to your Vendor Profile by you or other Seller Administrator(s) in your company.

The screenshot displays the NJSTART Vendor Profile interface. The top navigation bar includes the NJSTART logo and user profile icons. A sidebar on the left contains icons for various document types. The main content area is divided into two sections:

Attachments

Download	File	Description	Size	Uploaded By	Uploaded Date	Confidential	Delete
	SampleBlankOwnershipDisclosure.pdf		1,795,807 bytes	Dave Rodriguez	06/21/2017 09:48:23 AM	<input type="checkbox"/>	<input type="checkbox"/>

Below the table is an upload form with fields for File (Choose File), Description, and an Upload button.

Forms

Name	Description	Confidential	Attached By	Attached Date	Delete
Disclosure of Investigations	Disclosure of Investigations and Other Actions Involving Bidder - Full Version	<input type="checkbox"/>	Dave Rodriguez	04/13/2018	<input type="checkbox"/>
Statement of Bidder/Vendor Ownership	Ownership Disclosure - Use with Completed NJSTART Category ONLY	<input checked="" type="checkbox"/>	Dave Rodriguez	04/06/2018	<input type="checkbox"/>
Subcontractor Utilization Plan	Subcontractor Utilization Plan	<input type="checkbox"/>	Dave Rodriguez	04/13/2018	<input type="checkbox"/>

At the bottom of the Forms section are buttons for Add Form, Save & Exit, Save & Continue, Reset, and Cancel & Exit.



2.6 Click the Add Form Button

Click on the **Add Form** button, as shown below in red.

The screenshot shows the NJSTART interface with two main sections: Attachments and Forms. The Attachments section contains a table with one row: SampleBlankOwnershipDisclosure.pdf, 1,795,807 bytes, uploaded by Dave Rodriguez on 06/21/2017 09:48:23 AM. Below this is a file upload form with fields for File (Choose File: No file chosen) and Description, and an Upload button. The Forms section contains a table with three rows: Disclosure of Investigations, Statement of Bidder/Vendor Ownership, and Subcontractor Utilization Plan. The 'Add Form' button at the bottom is highlighted with a red box.

Download	File	Description	Size	Uploaded By	Uploaded Date	Confidential	Delete
	SampleBlankOwnershipDisclosure.pdf		1,795,807 bytes	Dave Rodriguez	06/21/2017 09:48:23 AM	<input type="checkbox"/>	<input type="checkbox"/>

Name	Description	Confidential	Attached By	Attached Date	Delete
Disclosure of Investigations	Disclosure of Investigations and Other Actions Involving Bidder - Full Version	<input type="checkbox"/>	Dave Rodriguez	04/13/2018	<input type="checkbox"/>
Statement of Bidder/Vendor Ownership	Ownership Disclosure - Use with Completed NJSTART Category ONLY	<input checked="" type="checkbox"/>	Dave Rodriguez	04/06/2018	<input type="checkbox"/>
Subcontractor Utilization Plan	Subcontractor Utilization Plan	<input type="checkbox"/>	Dave Rodriguez	04/13/2018	<input type="checkbox"/>

After clicking on the **Add Form** button, the Search Template screen appears, as shown below.

The screenshot shows the NJSTART Search Template screen. It features a 'Search Using' dropdown menu set to 'ALL of the criteria'. Below this are 'Search Fields' with input boxes for 'First Name', 'Last Name', and 'Form Title'. There are 'Find It' and 'Clear' buttons. At the bottom, there is an 'Exit' button and a copyright notice: 'Copyright © 2018 Periscope Holdings, Inc. - All Rights Reserved.'

2.6.1. Searching for a Form Template

If you know the name of the form, or even just the first few letters, type it in the Form Title field and click **Find It**. If you do not know the name of the form you are seeking, leave all search fields blank and click **Find It**. A list of all available forms will be displayed, as shown on the next page.



Search Using: ALL of the criteria

Search Fields: First Name, Last Name, Form Title

Find It Clear

Results

Select	Form Title	Form Description	First Name	Last Name	Date Created
<input checked="" type="checkbox"/>	Disclosure of Investigations	Disclosure of Investigations and Other Actions Involving Bidder - Full Version	inactive	inactive	11/18/2014
<input type="checkbox"/>	Disclosure of Investigations and Other Actions Involving Bidder	Disclosure of Investigations and Other Actions Involving Bidder - Use with Completed NJSTART Category ONLY	Megan	Tagliaferri	11/21/2014
<input type="checkbox"/>	Disclosure of Investment Activities in Iran	Disclosure of Investment Activities in Iran - Use with Completed NJSTART Category ONLY	Administrator	System	11/04/2014
<input type="checkbox"/>	Disclosure of Investment Activities in Iran	Disclosure of Investment Activities in Iran - Full Version (Non NJSTART Certification)	Jacqueline	Kemery	05/24/2016
<input type="checkbox"/>	Source Disclosure Certification Form	Source Disclosure - Full Version	Megan	Tagliaferri	08/27/2015
<input type="checkbox"/>	Statement of Bidder/Vendor Ownership	Ownership Disclosure - Full Version	Shawn	Laidlaw	03/08/2017
<input type="checkbox"/>	Statement of Bidder/Vendor Ownership	Ownership Disclosure - Use with Completed NJSTART Category ONLY	Shawn	Laidlaw	03/09/2017
<input type="checkbox"/>	Subcontractor Utilization Plan	Subcontractor Utilization Plan	Megan	Tagliaferri	08/27/2015
<input type="checkbox"/>	Two-Year Ch 51 / Executive Order 117 Vendor Certification and Disclosure of Political Contribution	Two-Year Ch 51 / Executive Order 117 Vendor Certification and Disclosure of Political Contribution	Shawn	Laidlaw	03/06/2017

Attach Form Edit & Attach Form

Current Company: Vendor Admin, Inc. | April 13, 2018 3:09:03 PM EST

2.6.2. Select a Form Template from the Search Results

- Select a form template from the search results as shown above.
- Click **Select** next to your choice and then click **Edit & Attach Form**.
- Please ensure that you do not accidentally click the **Attach Form** button instead because this will merely attach a blank form to your profile.

NOTE: Your edits are recorded in a copy of the form template. The template itself remains unchanged.



2.6.3. Complete the Online Form

“Fill out” the form by entering or editing text in the fields provided and in accordance with the instructions contained on the form. A red asterisk * next to a form field name indicates that an entry in that field is mandatory. You will not be able to save or attach the completed form if any of these mandatory fields are left blank.

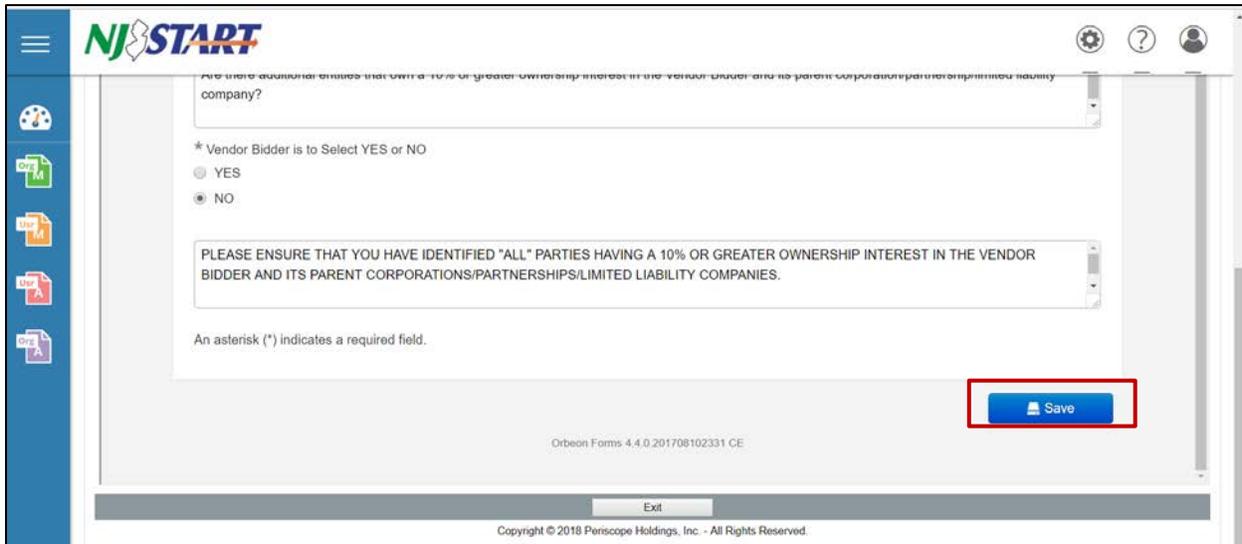
The following exhibit represents a sample of an online form. Complete all required form entries (indicated by an asterisk *) and follow all instructions.

Optional fields that are left blank while editing will display as blank when the form is attached to your profile or other **NJSTART** records.

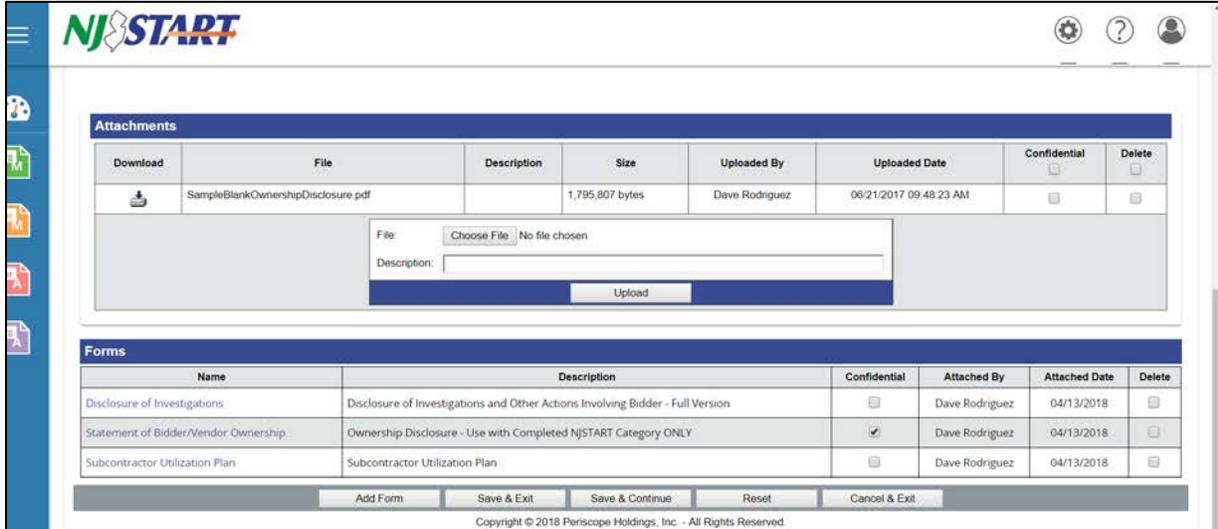


2.6.4. Save the Completed Online Form

After completing the form, scroll to the bottom, click **Save**, and then click **Exit**, as shown below.



Once the new form is saved and attached to your profile it will appear in the list of forms at the bottom of the General Organization Information page, as shown below. This list also presents the form description, the name of the person who attached the form, and the date it was attached.



2.7 Making a Form Confidential

Please do not mark any forms in your **NJSTART** profile as **Confidential**. Marking a form Confidential means that it cannot be viewed by the State's procurement specialists when they examine your Vendor Profile or submitted Quote. The State reserves the right to uncheck any documents marked as Confidential in order to view them.



2.8 Deleting or Editing an Existing Vendor Form

When using **NJSTART** you will have both the opportunity and responsibility to keep your company's vendor forms up-to-date. That way, you can quickly and easily include them as attachments to your Quote when responding to State Bid Solicitation opportunities.

2.8.1. Deleting an Attached Form

To permanently delete a form from the Forms list, return to the Forms section at the bottom of the General Organization Information page, click the box in the **Delete** field for the selected form and then click **Save & Exit** or click **Save & Continue**. Deleted forms will no longer be accessible.

Download	File	Description	Size	Uploaded By	Uploaded Date	Confidential	Delete
	SampleBlankOwnershipDisclosure.pdf		1,795,807 bytes	Dave Rodriguez	06/21/2017 09:48:23 AM	<input type="checkbox"/>	<input type="checkbox"/>

Name	Description	Confidential	Attached By	Attached Date	Delete
Disclosure of Investigations	Disclosure of Investigations and Other Actions Involving Bidder - Full Version	<input type="checkbox"/>	Dave Rodriguez	04/13/2018	<input type="checkbox"/>
Statement of Bidder/Vendor Ownership	Ownership Disclosure - Use with Completed NJSTART Category ONLY	<input type="checkbox"/>	Dave Rodriguez	04/13/2018	<input checked="" type="checkbox"/>
Subcontractor Utilization Plan	Subcontractor Utilization Plan	<input type="checkbox"/>	Dave Rodriguez	04/13/2018	<input type="checkbox"/>

Buttons: Add Form, Save & Exit, Save & Continue, Reset, Cancel & Exit

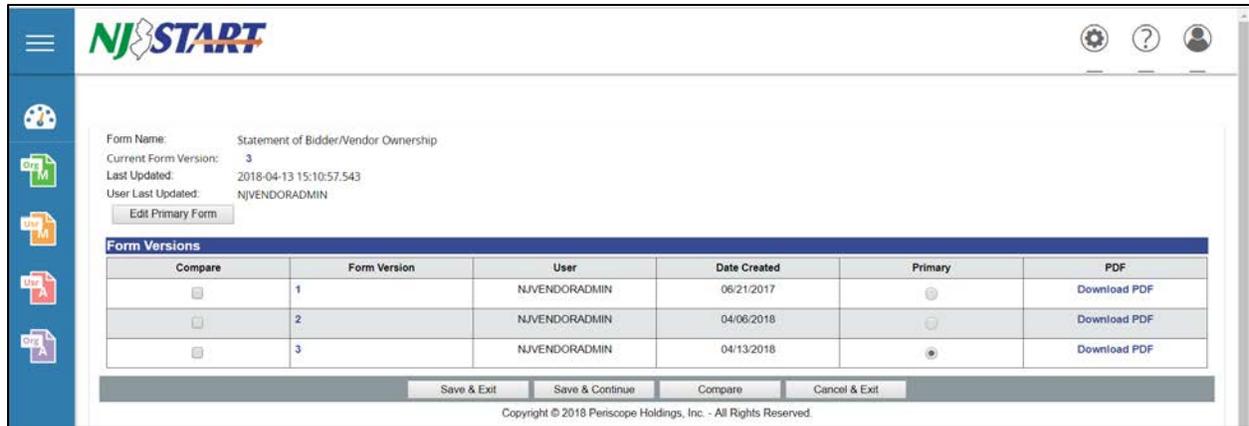
2.8.2. Select and Open the Form to be Edited

Choose the form you wish to edit by clicking on its link in the **Name** field of the Forms list.

Name	Description	Confidential	Attached By	Attached Date	Delete
Disclosure of Investigations	Disclosure of Investigations and Other Actions Involving Bidder - Full Version	<input type="checkbox"/>	Dave Rodriguez	04/13/2018	<input type="checkbox"/>
Statement of Bidder/Vendor Ownership	Ownership Disclosure - Use with Completed NJSTART Category ONLY	<input type="checkbox"/>	Dave Rodriguez	04/13/2018	<input checked="" type="checkbox"/>
Subcontractor Utilization Plan	Subcontractor Utilization Plan	<input type="checkbox"/>	Dave Rodriguez	04/13/2018	<input type="checkbox"/>

Buttons: Add Form, Save & Exit, Save & Continue, Reset, Cancel & Exit

Before the form itself opens, the screen on the next page will appear.



This screen presents a list of all saved versions of the selected form, the username of the Seller Administrator who last edited them and the date they were last saved. From this screen you can download PDF copies of any of the forms to your desktop. To aid in form review and selection, you can make a side-by-side comparison of any two versions of the same form by clicking in the checkbox for each one in the **Compare** column, and clicking on the **Compare** button at the bottom of the page.

You can make a final selection of the form version that you wish to edit by clicking the button in the **Primary** column and then clicking on the **Edit Primary Form** button at the top of the screen as shown above.

Designating a version of a form as PRIMARY flags that version as the most current (most recently edited) version. Remember, all form versions are saved in **NJSTART** until deleted by a Seller Administrator.

After the primary version of the form has opened it can be edited, and then saved.

2.9 The Link between Some Vendor Forms and Vendor Profile Categories

Your company's **NJSTART** Vendor Profile contains a number of categories. These are managed by Seller Administrators using the instructions provided in the QRG titled *Categories & Certifications*.

Some Vendor Profile categories allow Vendors {Bidders} to submit shortened versions of some required forms. In some instances, no forms may be required. These forms can be identified by the description, "Use with Completed **NJSTART** Category ONLY." Shortened versions of required forms must be completed and submitted using **NJSTART**. Hard copy submissions of shortened vendor forms will not be accepted.

Vendor Profile categories that qualify for shortened versions of required vendor forms include:

- Disclosure of Investigations and Other Actions Involving Bidder ;
- Disclosure of Investment Activities in Iran;
- Ownership Disclosure.

NOTE: Please refer to the QRG titled *Categories & Certifications* for further information regarding the completion of shortened vendor forms and the circumstances under which they can be used.