Best Practice Award - Innovation in the Procurement Process

Project Title: Automating Vendor Registration and Compliance Process

Submitted By: Miami-Dade County, Internal Services Department, Strategic Procurement Division

Project Summary:
The Miami-Dade County (County) Internal Services Department (ISD), Strategic Procurement Division, automated the vendor registration and compliance process which eliminated most of the manual activities while enhancing the quality and efficiency of the procurement operation. In order to interact with firms that wish to do business with the County through the innovative Vendor Portal (Portal), ISD is responsible for registering vendors and managing those relationships throughout the procurement process. All firms that bid on County solicitations are required to register as a County Vendor. In order to address a high volume of vendor applications and solicitation documents, and the countless sheets of paper required for the manual process, the County successfully developed and implemented an online portal where vendors can easily access and submit important information.

Vendor registration applications are now exclusively accepted through the Portal, which has streamlined the paper-based vendor registration process into a fully automated, self-service process. The Portal allows firms to conveniently register as County vendors, view their application status, and update their profile from the comfort of their own computers, eliminating the need to visit County facilities. The Portal includes online completion of the vendor registration application as well as online acceptance of affidavits, and provides Vendors access to upcoming business opportunities, existing contract details, previously awarded contracts, and payment information.

Through the Portal, the County now offers an easy to use and efficient service that alleviates valuable staff time and resources while creating an accessible way to do business with the County. The implementation has reduced user error, processing delays, and reporting problems as well as significantly reducing the burden on vendors to visit County offices to register and make changes to their vendor profiles.

Originality:
The Portal represents a new or different creative approach to service delivery or process improvement. The County implemented a step-by-step self-service vendor portal where all functions related to a vendor are consolidated in a single place. Vendors are notified of new business opportunities via email and have unrestricted access to important information. Registered vendors are able to log-in and view current business opportunities, link to payment information, pay local business taxes, as well as edit their contact information and commodity codes using a centralized, secure portal. Through this innovation, vendors can communicate with the County’s vendor services staff directly using the Portal without the need to know the email address or phone number of County staff. All documents are electronically signed and electronically submitted, eliminating the need to print documents, pay for postage, or visit County offices. In addition, as County legislation changes and/or new requirement are implemented which need to be added to the Vendor registration process, the Portal is adaptable to allow for such enhancements to be made. In this way, Vendors are able to update, supplement, and/or make other necessary changes to their vendor records.
Following are a few of the key screens that are used for registering in the Vendor Portal

1. Go to the following website address: http://www.miamidade.gov/localvendor
2. Click “REGISTER NOW”

Three easy steps to do business with Miami-Dade County

Register for your all-access pass to do business with the County. It's free.

Vendor Registration
Register here to become a County vendor.

BidSync
Sign up with BidSync to bid on goods and services.

Prequalified Pools
Explore and join prequalified pools for business opportunities.

Welcome to Miami-Dade County's Vendor Portal. Vendors must complete the General Business Information and the Commodities sections in order to receive notice of current solicitations. After completion of these two sections, an automatic notification will be forwarded to the email address provided under the General Business Information section notifying you that the account has been created and needs activation. After login, you will have the opportunity to fully register by completing the rest of the registration application to be processed by Miami-Dade Procurement. To receive email notifications of business opportunities that are available with Miami-Dade County, please register with BidSync through www.BidSync.com by choosing the “Register for Free” option.

Vendors are not required to fully register to receive solicitation notices or submit a proposal. Vendors must be fully registered in order to receive a bid award.

Note: Before you register, go to the Is My Company Registered to search if your company is already registered with Miami-Dade County.
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**General Business Information**
- Business Name, Physical Addresses, Contact Information and profile information.

**Commodities**
- Identifies the goods and/or services the company can supply to Miami-Dade County.

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**Note:** Before you register, go to the [Is My Company Registered](#) to search if your company is already registered with Miami-Dade County.

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### Business Information Commodity

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>User ID:</strong></td>
<td>Enter User ID</td>
</tr>
<tr>
<td><strong>Password:</strong></td>
<td>Enter Password</td>
</tr>
<tr>
<td><strong>Confirm Password:</strong></td>
<td>Enter Confirm Password</td>
</tr>
<tr>
<td><strong>Security Question:</strong></td>
<td>Choose One...</td>
</tr>
<tr>
<td><strong>Security Answer:</strong></td>
<td>Enter Secret Answer</td>
</tr>
<tr>
<td><strong>Business Name:</strong></td>
<td>Enter Business Name</td>
</tr>
<tr>
<td><strong>Doing Business As:</strong></td>
<td></td>
</tr>
</tbody>
</table>

### Physical Address

- Enter the physical address for main office.
- **Street:** Enter Street
- **City:** Enter City
- **Country:** UNITED STATES
- **State / Province:** Florida
- **Zip Code:** Enter Zip Code

### Contact Information

Information provided in this section will be used for all communication between the firm and Miami-Dade County.

- **First Name:** Enter First Name
- **Last Name:** Enter Last Name
- **Email:** Enter Email
- **Phone No.:** Enter Phone No.
- **Fax No.:** Enter Fax No.

Length of email address must be less than or equal to 40 characters.

**Confirm Email:** Enter Confirm Email

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**Save**
Dear Jane Doe,

Please click on the activation link or paste it in to your web browser to activate your account.

<table>
<thead>
<tr>
<th>Business Name:</th>
<th>OUTREACH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doing Business As:</td>
<td></td>
</tr>
<tr>
<td>User ID:</td>
<td>outreachevent</td>
</tr>
<tr>
<td>Activation Link:</td>
<td><a href="https://www.miamidade.gov/vendor/NewVendor/ConfirmVendor?token=Ef7mm6QWydos45b6G_SmXv2">https://www.miamidade.gov/vendor/NewVendor/ConfirmVendor?token=Ef7mm6QWydos45b6G_SmXv2</a></td>
</tr>
</tbody>
</table>

If you have not requested the activation link, please contact vendor services at 305-375-5773 or ISDPMVENDOR@miamidade.gov.

Note: This e-mail message was sent from a notification-only address that cannot accept incoming e-mail. Please do not reply to this message.

Regards,
Vendor Services Section,
Procurement Management Services Division,
Internal Services Department,
Miami Dade County.

WELCOME!

Your account is activated.

You have successfully provided information to start receiving current advertised solicitations from Miami-Dade County for the selected commodities.

Please login to continue with the registration process. Should you decide not to continue with the registration process at this time, you can always access your account from http://www.miamidade.gov/Procurement.

The following documents are required and must be uploaded in order to complete the vendor registration application:

- Miami-Dade County current Local Tax Receipt (for vendors physically located within Miami-Dade County)
- Certificate of Incorporation (if applicable)
- W-9 (or applicable IRS form)
- IRS letter 147C, verifying your business name and FEIN or any other preprinted IRS form issued by the IRS identifying your business name and FEIN.

Note:
Commencing January 21, 2014, Miami-Dade County advertises all competitive solicitations for goods and services issued under the Procurement Management Division of the Internal Services Department through the Bidsync Electronic Bidding System. There is NO CHARGE TO VENDORS for use of this service. If you have not already done so, register with Bidsync through www.bidsync.com by choosing the ‘Free Registration’ option. Miami-Dade County does not endorse Bidsync subscription services besides the FREE service provided by Bidsync for Miami-Dade County business.
Effectiveness:
The cost savings to the County realized through alleviating valuable staff time and reducing printing, storing, and reporting costs has more than compensated for the total initial investment made to develop and implement the Portal. The automation has also reduced the use of paper through the registration process, which has vastly improved County staffs’ working environment. There are no longer stacks of boxes filled with registration applications encumbering County offices and storage rooms. County staff no longer needs to spend hours physically searching through the boxes for specific vendor applications. The office area of the Vendor Outreach Services and Support Unit now clean, hazard-free, and more conducive to a productive work environment.

Benefits for vendors are demonstrated by the elimination of printing costs and postage costs, as well as the time savings from not having to visit County offices. The applications are processed and approved quickly because data is entered only once by the vendor. Vendors are also now able to access a wealth of information using the expedient, self-service Portal without having to rely on County staff.

The County has achieved its objective of making the process user-friendly and convenient for the vendors by eliminating postage costs, having 24x7x365 availability of the system, elimination of paper use (going-green), and a clutter-free work environment for staff. The Portal has improved the County’s overall efficiency by improving record keeping and reporting, eliminating redundant data entry, minimizing mistakes, and allowing Procurement staff to focus on other important responsibilities.

Significance:
The County vendor registration process is complicated because of several unique registration requirements. The innovative implementation automated a cumbersome manual process and provided a convenient procedure for County employees and Vendors to access important information. Prior to the launch of the Portal, vendors often criticized the complexity and difficulty of completing the registration process. In addition to basic company information, the County requires 13 different notarized affidavits to be submitted along with the vendor application. In order to develop an appropriate solution, ISD worked closely with the County Attorney’s Office to design an electronic vendor registration system that complied with existing business rules while making the registration process easier for our vendor community. Using the Portal, vendors are now able to view their registration status online and are able to provide required documentation with a few simple clicks on their computers. The Portal has also reduced the time it takes to obtain vendor certifications by eliminating the need to physically visit County offices.

Transferability:
This innovative and simple automation is a win-win solution for County staff who process vendor information and the vendor community who can now access the self-service Portal at any time. The Portal is a flexible system that has the potential to accommodate future needs and further streamline the process. The response from the vendor community has been overwhelmingly positive. The vendors now save on printing and postage costs and have reported ease of use when submitting their registration documents via the web-based Portal. This functionality has improved the working environment of the County’s administrative staff and significantly improved vendors’ experience doing business with the County. There are numerous agencies which look to the County and its operations as a business model who will find this innovative solution to be extremely beneficial for their operations.