

Transfer Data to a New Round

When agencies make **significant changes** to an RFx, like modifying the scope, a **new round** of an RFx is issued in PASSPort.

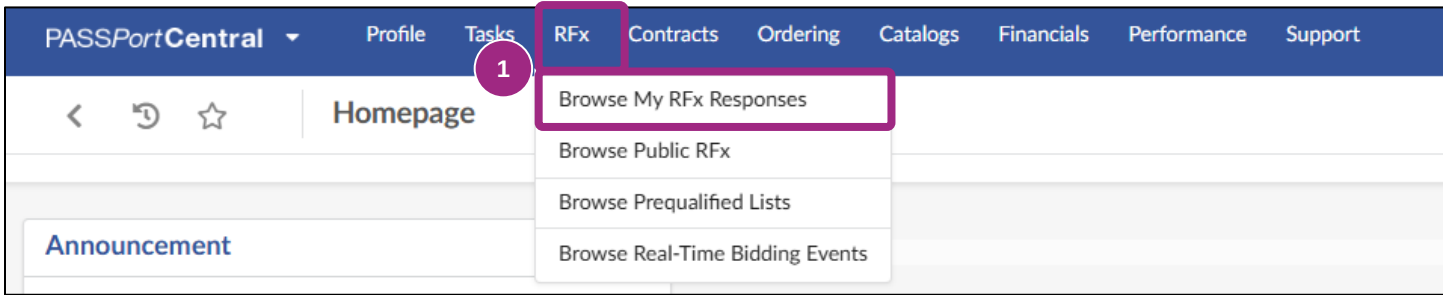
Review the RFx changes in the New Round **Addendum**.

Important: To continue to participate in an RFx, **submit a new proposal (RFx response) in the updated round**, as proposals from previous rounds will not be considered!

To make responding to a new round faster and easier, follow these steps on how to **transfer data** (by duplicating it) from your original RFx response(s) for a previous round to the latest round.

Note: The terms **response** and **proposal** are used interchangeably.

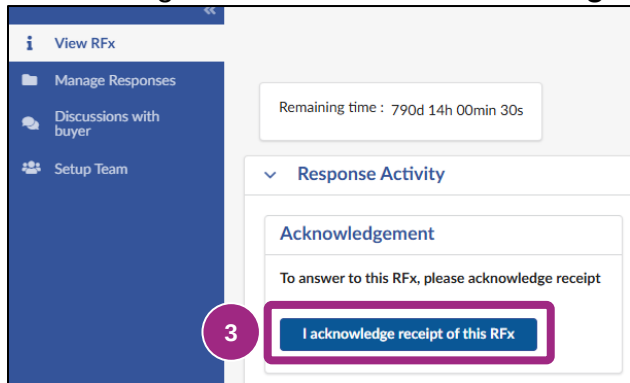
1. In PASSPort Central, click **RFx** and select **Browse My RFx Responses** from the drop-down menu.



2. Click the **pencil** icon to access the new round (indicated by the **Released** RFx status).

Program	Industry	Agency	EPIN	Procurement Name	Procurement Method	RFx Status
 ck Better	Human/Client Service	ADMINISTRATION FOR CHILDREN'S SERVICES	06825P0003	06825P0003-L&D Staging	Competitive Sealed Proposal	Released
 Program_Name_Test	Professional Services - IT Related	ADMINISTRATION FOR CHILDREN'S SERVICES	06825P0002	06825P0002-Design Consulting	Competitive Sealed Proposal	Released

3. You will automatically be brought to the View RFx tab. If the procurement requires acknowledgement, click the **I acknowledge receipt of this RFx** button.



If the procurement does not require an acknowledgement, skip to step 7.

4. Select the **WILL RESPOND** radio button.

5. Click the green **Valid** button.

Response Activity

Receipt acknowledged on 11/1/2024 10:45:53 AM (Your Local Time)

To answer to this RFx, please confirm that you intend to bid.

☒ WILL RESPOND: our intent is to respond to this RFx

☐ WILL NOT RESPOND: our intent is not to respond to this RFx

Valid

The page will refresh.

6. PASSPort will generate a blank proposal in **In Progress** status in the **Manage Responses** tab.

7. Click the **pencil icon** to access the proposal.

PASSPortCentral

Profile Tasks RFx Contracts Ordering Catalogs Financials

Performance Support

26026P0004-COMPASS Center-Based and Non-Public School Site Programs (031856) - Lot : / Round : 2

Save Create a new proposal Duplicate Response

View RFx

Manage Responses

Discussions with buyer

Setup Team

Response Activity

Status: Canceled Submitted In progress Search Reset

Your Proposal Info: Competition Pool

RFx Name	Response Name	Competition Pool	Responsiveness Status	Submission Status	Submitted on (Your Local Time)	Selection Status	Response Price
26026P0004-COMPASS Center-Based and Non-Public School Site Programs	Proposal # 1		In progress				

1 Result(s)

8. Click the **Duplicate Response** button at the top of the page.

26026P0004-COMPASS Center-Based and Non-Public School Site Programs (031856) - Lot : / Round : 2

Save Save and Close Close

Cancel this response Validate & Submit Duplicate Response

RFP 26026P0004-COMPASS Center-Based and Non-Public School Site Programs - 2 (Released)

Fields marked by an asterisk * are mandatory

Text Alert

Please complete the Your Proposal Info: Competition Pool field and click Save to reveal the Manage Documents button to upload a document.

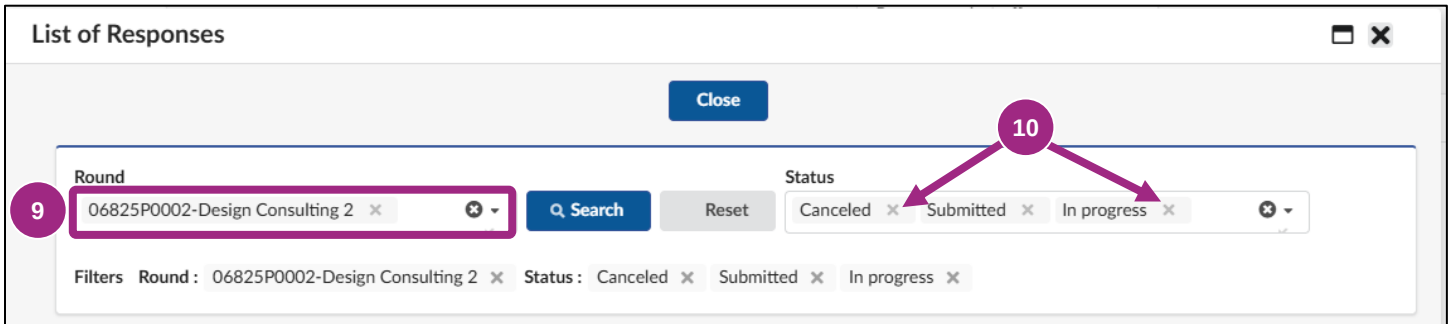
Response Label*

Proposal # 1

Description

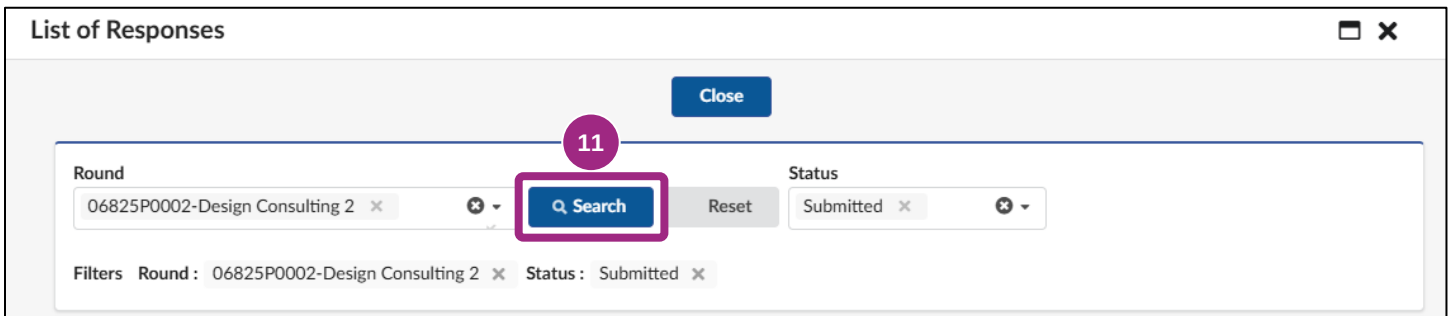
The **List of Responses** window will display.

9. In the **Round** field, check to make sure the round from which you would like to transfer data displays. The latest round will display by default.
10. Click the **X** to **remove Canceled** or **In Progress** RFX responses, narrowing search results to show only **Submitted** proposals.



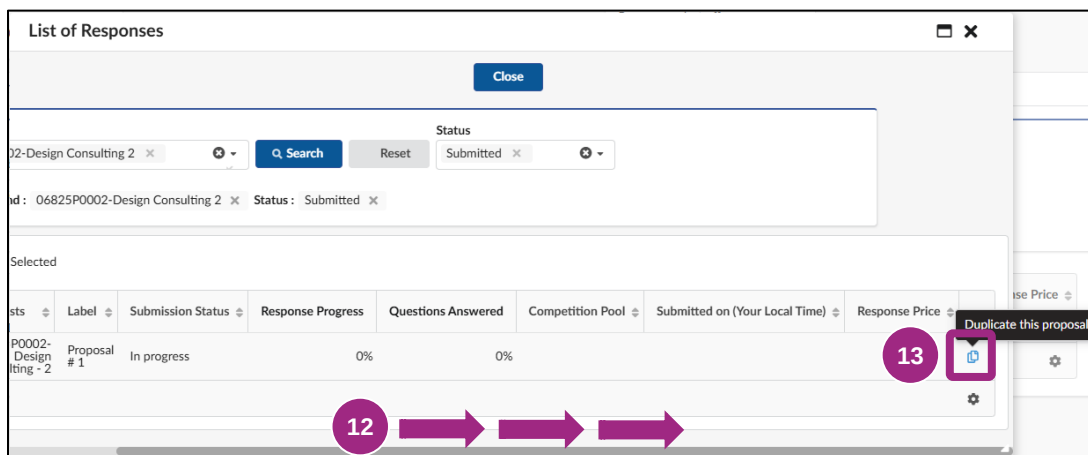
Note: To duplicate a proposals that you began working on but did not submit, select **Canceled** from the Status drop-down menu. PASSPort automatically cancels all draft proposals when a new round is released.

11. Click the **Search** button. Only **Submitted** responses should now display.

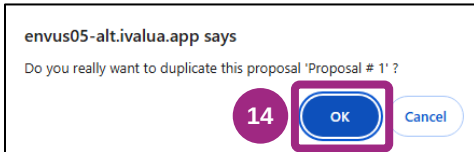


12. Scroll to the right using the **scroll bar** at the bottom of the window.

13. Click the **Duplicate** button for the submitted RFX response you want to duplicate.

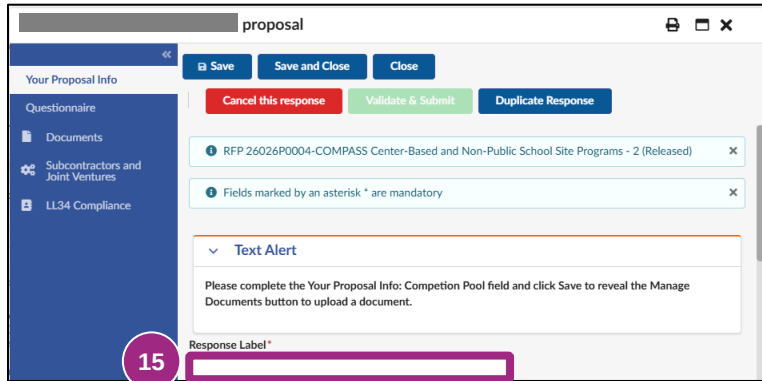


14. A message will pop-up asking you to confirm that this is the specific proposal you want to duplicate. Click the **OK** button to proceed.



You will be redirected to a pop-up window of your duplicated proposal.

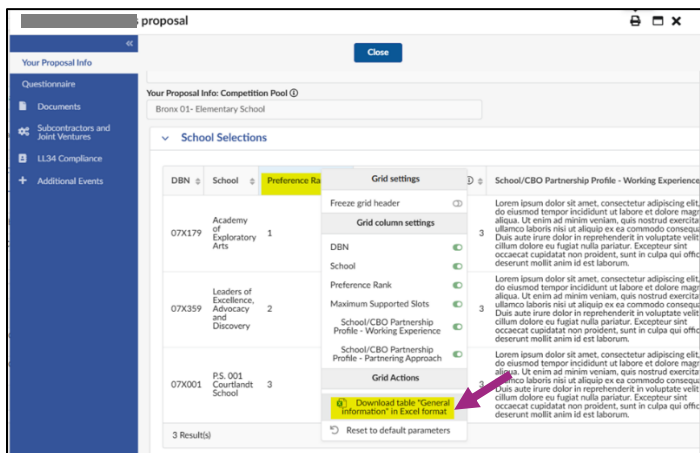
15. In the **Response Label** field, replace proposal name from **Copy of [proposal label]** to a better name and include the Round number (e.g., Round 2). This will make it easier to find later.



16. **Carefully review** the transferred information from proposals submitted/drafted prior to the latest Addendum. Responses may need to be updated based on the changes introduced in the new round!

Important: Not all information can be copied over, such as data entered in Competition Pool selection and details (if applicable). You still have access to your Round 1 proposal to view, copy & paste, take screenshots, or download data (see screenshot below) to capture information you want to enter in your Round 2 proposal(s).

To download data from a table, right-click the table header. The Settings menu will pop up. Under Grid Actions, select the **Download table** Excel option.



17. Complete and submit your response. For instructions, refer to the [Respond to RFX guide](#).