



Boulder County Area Agency on Aging
Solicitation of Qualifications
for **Financial Assistance SOQ #7228-21**

Submittal Instructions

for OAA-SYS[®] - Request For Proposals System

Submittal Due Date

May 5, 2021, 2:00 p.m.

The Overall Process

1. Register :: Create a profile and log in
2. Create blank response
3. Develop a response :: Fill in the details
4. Check for errors
5. Submit your finished response

Step 1: Create Profiles

For you and your agency

Login Setup

- Go to:
<https://bouldercountyaaa.oaa-sys.com/rfp/public>
- From **Open Solicitations**, select:
BCAAA SOQ for Financial Assistance
- The screen expands with instructions.

First, select the SOQ



OAA-SYS®
Request For Proposals
System

A screenshot of the OAA-SYS login interface. The page title is "Please Log In". There is a dropdown menu labeled "Open Solicitations:" which is open, showing two options: "BCAAA SOQ for Financial Assistance (04/13/21-05/01/21)" and "BCAAA SOQ for Choices@Home Program (04/13/21-05/30/21)". Below the dropdown are input fields for "E-mail" and "Password". At the bottom is a green "Login" button. A red arrow points from the text "First, select the SOQ" to the first option in the dropdown menu.

Login Setup, cont'd

- *Optional*
Click to review, in advance, the SOQ Required Reading.
- If an agency profile account has been set up, enter email and password, and click **Login**.
- Otherwise, click **please click here** to create an agency profile account.

Terms and Conditions display.



OAA-SYS®
Request For Proposals
System

Please Log In

Open Solicitations: BCAA SOQ for Financial A ▼

E-mail

Password

Instructions For this Solicitation:

1. To review/download the details of this solicitation [please click here](#)
2. If logging in for the first time, [please click here](#)

Login

Required Reading
during SOQ

Click to create
SOQ agency
account



Login Setup, cont'd

- Read **Terms and Conditions**.
- If in agreement, select **I AGREE** and click **Submit** to continue setting up an agency account.



OAA-SYS®
Request For Proposals System

Have a question? ×

Contact Carlene Okiyama at
[\(303\) 441-1598](tel:3034411598) or
cokiyama@bouldercounty.org

[Review Required Reading](#)

Terms and Conditions

SOQ #7228-21: BCAA SOQ for Financial Assistance

1. Proposers are expected to examine the drawing, specifications, schedule of work, and drawings. Failure to do so will be at the proposer's risk.

- I AGREE to the terms as noted above.**
- I DO NOT AGREE to the terms and conditions as noted above.**



Every agency must create a profile

- One-time agency profile setup
First time agency accesses SOQ
- First of two-part process:
 - One profile for the **AGENCY**
 - Profile for SOQ contact.
- Click **Create Agency Profile**

Enter Your Agency Registration Code

Agency Already Registered?

If your agency has already registered for this Statement of Qualifications, enter your agency registration code below to continue

Agency Not Registered?

If your agency has not yet registered for this Statement of Qualifications click the button below to create an agency profile and receive a registration code



Creating AGENCY profile

1. Complete the agency registration form.
2. Click **Create Agency Profile**
3. An **Agency Registration Code** displays immediately and is also emailed to the address on the form.

Register Your Agency:

BCAAA SOQ for Financial Assistance

Please enter the following information about your agency.

Once you have registered your agency for this Statement of Qualifications, you will be assigned a system-generated Agency Registration Code. You will need to share this code with others in your organization before they can create their login profiles

Legal Name of Agency (as used in contracts)

DBA Name (if different)

Address

Street Address

Creating AGENCY profile (cont'd)

- Retrieve the **Agency Registration Code** from the screen.
The code was also emailed:

You have successfully registered your agency for the following Statement of Qualifications: **BCAAA SOQ for Financial Assistance**

Your assigned Agency Registration Code is

TJY2-MYM6J

Please share this code with the others in your agency that also plan to work on this Statement of Qualifications. They will need this code to create their login profile.

- Provide agency SOQ contact(s) with the code.
Share code with others in the agency working on the Response.
- Enter in **Agency Registration Code** and click **Submit** to continue.

Enter Your Agency Registration Code

A record for your agency was created successfully and assigned the registration code TJY2-MYM6J. This code was emailed to the address you provided, but PLEASE WRITE IT DOWN NOW. You will need to share it with your colleagues. Once you have recorded the code, enter it below to create yourself a login profile

Agency Already Registered?

If your agency has already registered for this Statement of Qualifications, enter your agency registration code below to continue

Agency Registration Code Obtain this code from person that created your agency profile

Creating PERSONAL profile and Logging In

1. **Personal Login Profile** form displays. Complete and click **Save** to create a personal login.
Make note of the password.
2. Login page displays. Select SOQ, enter personal login email address, and password.
3. Click **Login**.

Create Your Personal Login Profile:

BCAAA SOQ for Financial Assistance

Your agency is registered for this RFP. Please create your own login profile

First Name

Last Name

Please Log In

Open Solicitations: BCAAA SOQ for Financial Assistance (04/13/21-05/01/21)

email-address@gmail.com

••••••

Instructions For this Solicitation:

1. To review/download the details of this solicitation [please click here](#)
2. If logging in for the first time, [please click here](#)

Login

SOQ Required Reading sections

Required Reading for BCAAA SOQ for Financial Assistance

Please review each of the following sections of the required reading.

- SOLICITATION OF QUALIFICATIONS COVER PAGE
- PROPOSAL INSTRUCTIONS
- TERMS AND CONDITIONS
- SPECIFICATIONS
- NARRATIVE & QUALIFYING QUESTIONS
- INSURANCE REQUIRMENTS
- SUBMITTAL SECTION
- EVALUATION CRITERIA
- SIGNATURE PAGE
- BOULDER COUNTY SAMPLE CONTRACT

I have read and understand the information in the required reading sections.

Agree

Beginning with SOQ cover page, which includes the schedule, program details, and provider requirements:

- Sequence through each section.
- Check final checkbox and click **Agree**.
- Proceed to Agency Home Page.
- Create a new response.



Step 2: Create Blank Response

A click of the button!

Agency Home Page

To create a new response, click the "Create new response" button. This will create a blank proposal for your to complete.

Create new response

Step 3: Fill in Response Details

Where the real work happens

Click **Edit**

Response Description displays
with SOQ navigation menu on left.

Existing Proposals: 1

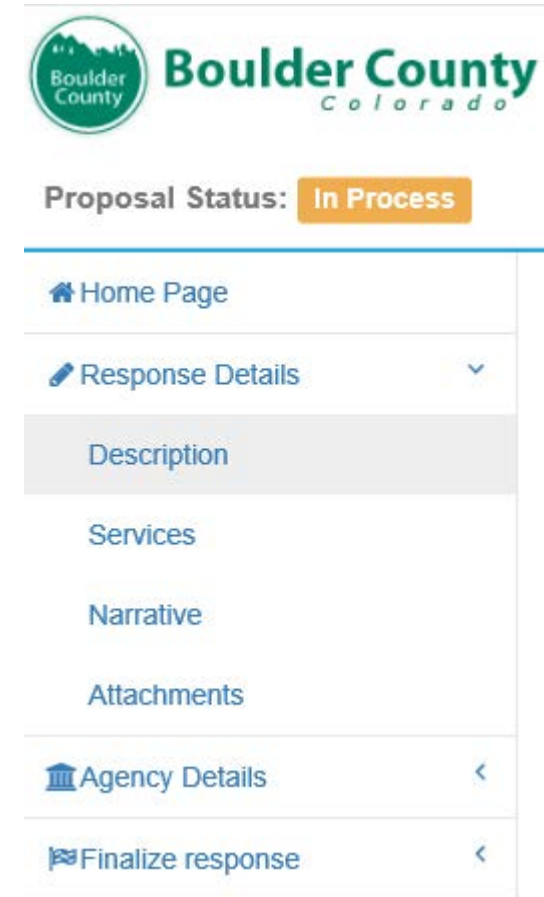
ID	Name	Created By	Status	Download (pdf)	Edit	Delete
3005	NEW BLANK PROPOSAL	Jane Ireland	In Process	 Download	 Edit	 Delete

Step 3: Response Details – Key Tasks

- Complete each section of the response.
Who completes what sections varies agency to agency.
- When finished, attach any required documents to submit with your response.

Step 3: Response Details

- Navigation menu
 - Four required **Response Details** sections:
 - ✓ Description
 - ✓ Services
 - ✓ Narrative questions
 - ✓ Attachments.
 - When finished with one section, click on the next section in the navigation menu to continue.



Step 3: Response Details – Description

1. Enter **Response Title**.
2. Enter **Response Description**.
3. Click **Save**.
4. Select **Services** in the navigation menu to continue.

Response Description

Information saved successfully

Response Title:

ABC Emergency Housing Project

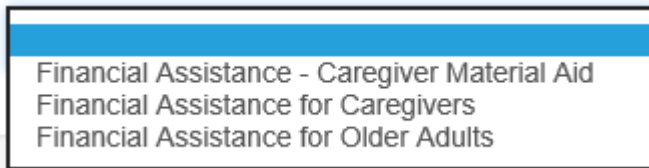
Note: You will have an opportunity to provide additional detail for each service under Services in the proposal.

Response Description:

After funds are procured, set up project administration and distribution committee to begin ide

Step 3: Response Details – Services

1. Click **Add Service** dropdown.
Select service. Options include:



Financial Assistance - Caregiver Material Aid
Financial Assistance for Caregivers
Financial Assistance for Older Adults

2. Click **Add Now**.
The service to be provided displays.
3. Select **Narrative** in the navigation menu to continue.

Response Services

Please identify the service(s) you plan to provide. Select the service from the dropdown below and then click the "Add Now" button.

Add Service:

Services Provided:

Service ID	Service	Delete
4096	Financial Assistance for Caregivers	Delete

Step 3: Response Details – Narrative

- Concerning the service program, answer all required questions in narrative form.
- Remember to save often to prevent loss of data.
- Then, as applicable, answer the additional questions.
- When finished, click **Attachments** in navigation menu.

Response Narrative

Please address the questions listed below, limiting each response to approximately 750 words. You do not need to use complete sentences. Lists, bulleted items, etc. are acceptable but please be as specific as possible. Remember to save often. Your session will time out after 20 minutes of inactivity.

Question 1: [Required]

Briefly describe the work your organization does and specifically the services you offer to older adults and caregivers?

Step 3: Response Details – Upload Docs

Click **Add Now** to attach and upload the required and additional documents.

Valid formats:

Valid file types:

- Microsoft Word (.doc or .docx)
- Microsoft Excel (.xls or .xlsx)
- PDF (.pdf)
- JPEG image/scan (.jpg or .jpeg)
- PNG image/scan (.png)

On the navigation menu, go to **Agency Details > Agency Information**

Upload/Attach Documents

Submit the following documents along with your response. Required documents are flagged so. Include the other documents if they are appropriate for your specific response:

1. Insurance Certificate - **REQUIRED**
2. W-9 - **REQUIRED**
3. Sample Contract deviations and justification

Select the document to add from the list below to create a blank record of the documents you wish to upload. Then use the "edit" link in the table to describe and upload the document. **NOTE:** You can upload multiple copies of the same type of document (for example, if your document is split across multiple files).

Add This Document Type	Insurance Certificate	▼	Add Now
------------------------	-----------------------	---	---------



Step 3: Agency Details – Agency

Complete
Agency Information
form.

Click **Save**.

On the navigation menu, go to
Agency Details >
Contact Information

Proposal Status: **In Process** Jane Ireland (Adept Boulder Caregiving) ▾

[Home Page](#)

[Proposal Details](#) <

[Agency Details](#) ▾

Agency Information

[Contact Information](#)

[Finalize proposal](#) <

Agency Information

Agency Name

DBA Name: (If different)

Federal Employer ID Number (FEIN):

Inception Date:

Organization Type:

 ▾

DBE status:(Select all that apply-hold shift key to select multiples)

Save



Step 3: Agency Details - Contact

Complete primary contact information and create other contact records.

In navigation menu, click **Finalize Response** ► **Validate**

Contact Information

Please identify the relevant individuals who will serve as the point of contact for the following roles

- Agency Director/CEO/Executive Director - **REQUIRED**
- Proposal Contact - **REQUIRED**
- Peer Place Data Entry
- Contract Contact
- Program Manager
- Reimbursement Requests
- Other

Add new contact

Step 4: Finalize Response – Check for errors

Validate. Submit. Print.

Step 4: Validation Process

- RFP system reviews response for errors.
- First attempt will probably yield errors.
- Submit is not possible until all errors are resolved.

Errors Found: 18
Errors must be resolved before you can submit this proposal.

Description Errors	1
Budget Errors	1
HOMEMAKER:- Revenues and Expenses (\$201.00 v \$2,200.00) must balance.	
Units/Clients Errors	6
Narrative Errors	7
Attachment Errors	0
Agency Details Errors	3

Step 4: Validation Process

Proposal Status: **Validated**

Jane Ireland (Adept Boulder Caregiving)▼

- Home Page
- Proposal Details <
- Agency Details <
- Finalize proposal ▼
- Validate**
- Submit
- Print

Proposal Validation

Validation Results

Congratulations! Your request validated successfully and is ready to be submitted.

Overview of the submit process

- All electronic
- Requires request and receipt of system-generated “Proposal Identification Number” (PIN)
 - System emails the PIN
 - There must be valid emails for two key contacts:
 - CEO/Director of the agency
 - SOQ response contact.

Step 5: Submit Finalized Response

Submit your Response

Step 5: Finalize Response – Request a PIN

- Under Submit Response, click **Request PIN**.
- Complete form and click **Submit**.

Digital Signature
Please enter all of the following information

Name of Signatory

Title

Email

Submit Date

Enter PIN

IMPORTANT NOTE: YOUR PROPOSAL WILL BECOME READ-ONLY AFTER YOU CLICK THE "SUBMIT" BUTTON.

Back

Submit



Step 5: Finalize Response – Request a PIN

- Receive PIN by email.
- Return to **Submit proposal.**
- Click **Submit Proposal.**

Submit proposal

Your proposal is ready to submit.

In order to do so, you must first obtain an electronic Proposal Identification Number (PIN). Request your PIN by clicking on the button below.

Request PIN

- A PIN was emailed to you
- If you do not receive a PIN within 20 minutes, please call Heather Jones at (970) 248-2717
- Note that PINs time out after twenty four (24) hours. You must have an active PIN in order to submit.

Already Have Your PIN?

Submit Proposal



Success!

Confirmation

The following proposal was submitted successfully

RFP/SOQ
Agency
Proposal
Submitted Date
Submitted Name
Submitted Email Address
Status