The purpose of this BC Bid Application Request for Information Quick Reference Guide is to act as a high-level guide. For detailed instructions and more information, go to the Ministry Buyer Guide.

The RFI is intended to solicit information from a particular supplier community regarding specific information being sought. It may be market sounding whether or not the supplier community offers a particular service or product.

To...	Follow these steps...	Tips and Links...
Create Sourcing Project	1. **Set up Project:** • Select Sourcing Project Type: **Strategic (Multistage)** • If posting on behalf of another organization **Issued for** is the Ministry/Branch requesting the procurement. • Main Commodity/Other Commodities: search for and select Commodity. • Click **Save.** 2. Click **Set up Team**. • The person who creates the Project has by default the Official Contact and Responsible roles. • Add any additional users based on their assigned roles. 3. Click **Set up Documents** to upload documents related to the Request for Information. • The documents are in draft status and will need to be changed to **Approved** status before being added to the opportunity in Prepare RFx. 4. Click **Add Suppliers** tab and select suppliers you wish to respond this RFI	How to create a Sourcing Project Set up Team Set up Documents
Prepare RFx	1. In the **Setup** tab select the Opportunity Type: **Request for Information.** 2. Fill in **Summary Details** and assign **Issue** and **Closing** dates. 3. Click **Validate & Save**. 4. In the **Additional RFx Info** tab, select submission delivery method(s), delivery location and Region. 5. In the **Documents** tab, upload documents (either new or from Set up Documents) and ensure all documents for supplier view are uploaded and marked as approved. 6. In the **Suppliers** tab, review Invited Suppliers list. 7. On the **Approvals** tab, fill out the applicable details. 8. Click **Validate & Save**.	Additional RFx Info How to add documents to an Opportunity
Issue RFx	1. Click **View as Supplier** to review the RFx. 2. Click **Ready to Issue** and remedy any missing information. 3. Click **All approvals complete**. 4. Click **Issue Opportunity**. 5. In the email pop-up window, edit the email accordingly. Click **Send and close**. 6. Click **OK** twice (Step 1 and Step 2). Your RFI is Open.	
If need to change the Closing Date	1. In the **Prepare RFx Setup** tab, change the **Closing Date**. 2. Issue an **Addendum** in the **Discussion Forum** to document the change.	

Issue Addendum	1. In the **Discussion Forum**, select **Compose Message**. 2. Send the message to **All invited suppliers.** 3. In the **Subject field** enter the Opportunity ID, Description and Addendum number. 4. In the body of the message, enter the content of the addendum. 5. *Optional*. Add an attachment.	Issuing an Addendum Addenda provide answers to questions or additional information
Issue an Amendment	1. In any **Prepare RFx** screen of the Open opportunity, select the **Other Actions** drop-down list, then select **Create a new amendment**. 2. Select the information to be copied to the new version. 3. In the **Prepare RFx Setup** screen, enter the **Amendment Reason** and select **Issue** and **Closing** dates. 4. Make any required changes and issue the opportunity.	Issuing an Amendment Amendments will require suppliers to submit new challenges
Review Submissions	Before the Opportunity closes: 1. Add offline submissions if any (can no longer add once closed). 2. Select **View RFx Activity** and review submissions for each supplier (download and distribute documents for review).	Uploading Submissions
Award an Opportunity	1. This function is not valid for RFIs, hence this step can be ignored and go to the next step: Notify & Share	
Notify & Share	1. Communication with respondents to thank them for their submissions (and advise them of shortlist status, if applicable) can be done via the **Discussion Forum** or **email** outside of BC Bid.	
Create a new Lot	1. In any **Prepare RFx** screen of a closed opportunity, select **Create new Lot**. 2. Select the information to be copied to the new lot. 3. Make any required changes and issue the opportunity. Validate and Save.	How to create a new lot New lots can be created to issue a new downstream opportunity (RFP, RFQ)
Update RFx and Project Status	Once a project is complete: 1. In **Prepare RFx Setup** tab, update the status to Completed. 2. In the **Set up Project** tab, update the status as needed.	Completing an Opportunity Closeout a Sourcing Project Suppliers need to know the final status of a Project even if it isn't awarded

Provincial Help Desk

Help Desk hours: 8:30 am to 4:30 pm
Monday to Friday
Email Contact: BCBID@gov.bc.ca

Contact the help desk by phone:
Direct: 1-250-387-7301
Toll Free (BC only): 1-800-663-7867
View the Help Desk Self-Help Resources

Training Help

Please see the BC Bid Resources website for a list of Ministry trainers and contact information.