

June 2018

Performance and Management Services Scheme – Updating supplier information

This quick guide contains information on:

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- Updating you company details
- Updating your company profile
- Updating your scheme application
 - Step 1 – Entity details
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 - Step 3 – Prequalification
 - Step 4 – Questionnaire
 - Step 5 – Capabilities
 - Step 6 – Review

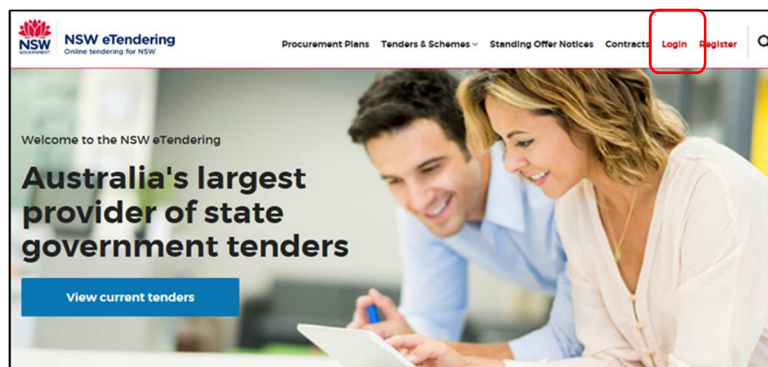
Overview

NSW Procurement has implemented changes to the Performance and Management Services Scheme (PMS Scheme). As part of the changes being implemented, suppliers are required to update several areas of their application, whether they applied through a hardcopy application or electronically.

This quick guide has been made available to assist suppliers in providing that information.

Accessing your scheme application

All scheme applications are now recorded electronically, even those that were submitted in hardcopy. To access your scheme application, **login** to the [NSW eTendering¹](https://tenders.nsw.gov.au/) website (schemes are accessed via the NSW eTendering system).



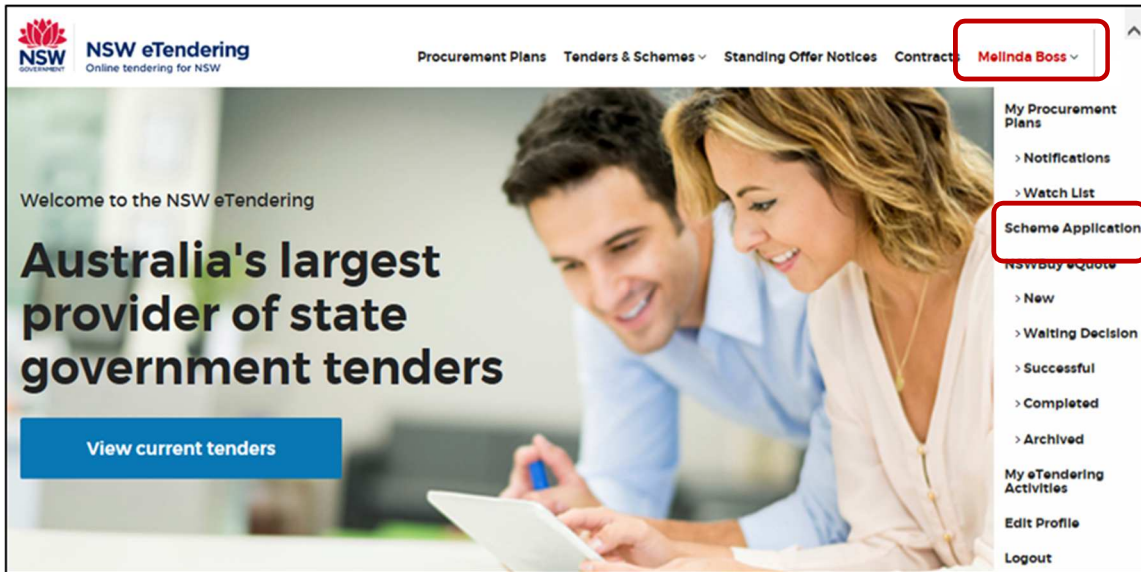
¹ <https://tenders.nsw.gov.au/>



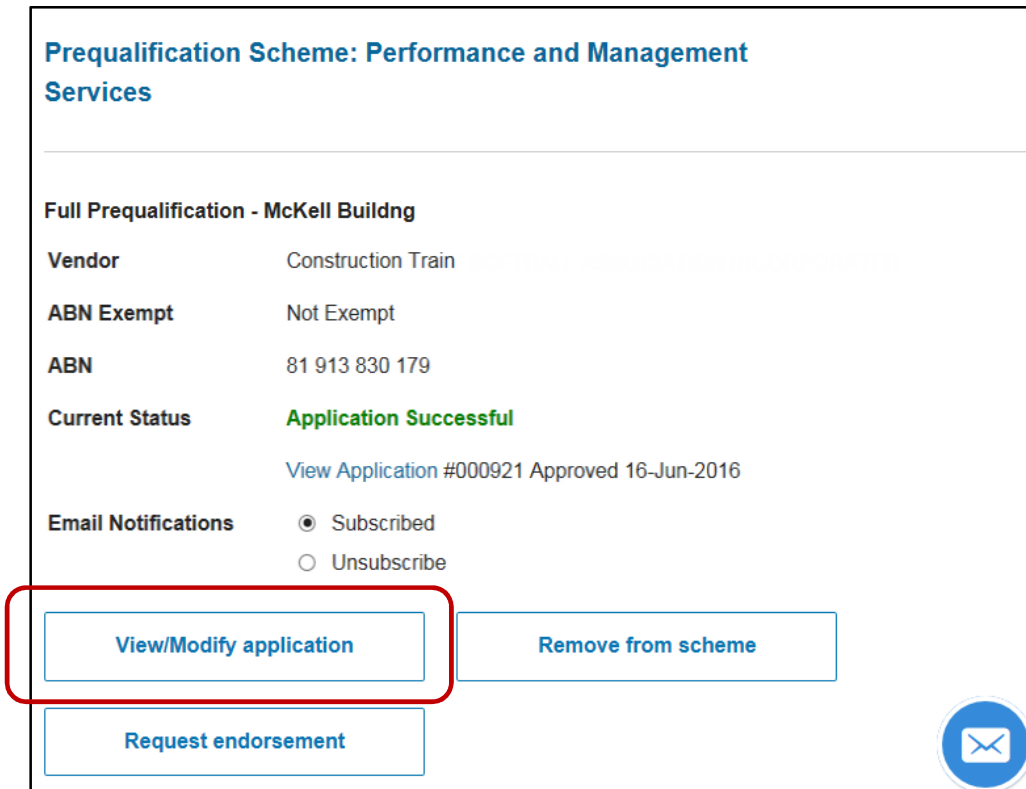
Only the authorised company scheme owner (who registered on behalf of your organisation), will be able to update your information.

If you are unsure who the authorised owner is, or need to update the authorised user, please contact the [NSW Procurement Service Centre](#) on 1800 679 289.

From the ‘Contact Name’ dropdown, select ‘Scheme Applications’.



Scroll to your application for the **PMS Scheme** and select the ‘View/Modify application’ button.





Your company **Preview Profile** will display.

Preview Profile - Construction Train

Company Details

❗ Org Size: SME = Number of Employees < 201
Org Size: > 200 = Number of Employees > 200
Org Size: Unknown = Number of Employees not known
(Note: Number of Employees details are self declared by Vendors.)

[Edit office details](#)

Entity Name
Business Name Construction Train
ABN Exempt Not Exempt
ABN 81913830179

Company Profile

[Edit company profile](#)

Small Business
Yes

Company Profile
[1 RFT Paths.docx](#)

Insurances
Public Liability Insurance, Workers Compensation Insurance,
Professional Indemnity Insurance

Other Insurances

Full Prequalification

[Edit application](#)

Scheme
Prequalification Scheme:
Performance and Management Services

This Vendor is qualified to supply the following capabilities to this Scheme:
1a. Strategy Development and Planning

Updating your company details

The **Company Details** section contains your contact details. Please ensure that all the following fields are current by selecting the **‘Edit office details’** button:

- Number of employees
- Office/Location name
- Contact details
- Address
- Service Area

Company Details

❗ Org Size: SME = Number of Employees < 201
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(Note: Number of Employees details are self declared by Vendors.)

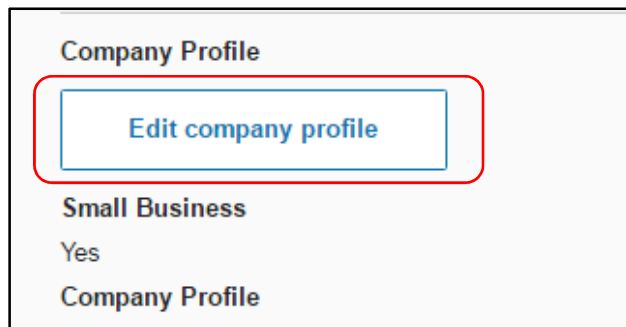
[Edit office details](#)



Updating your company profile

You **Company Profile** contains a range of information and documents relevant to your application. Please ensure that all relevant information and documents including those listed below, are provided by selecting the **'Edit company profile'** button:

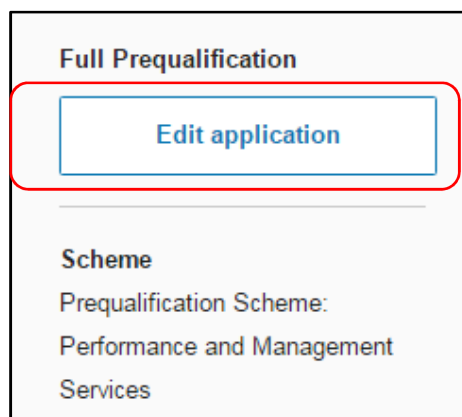
- Small business status
- Upload company profile document (core business, company structure, key personnel)
- Insurances
- Organisational experience
- Applicant validation



Updating your scheme application

The PMS Scheme has several new requirements that you may have not previously met or provided, depending on when you were approved. Documents outlining the **'engagement types'** (previously referred to as capabilities), organisational experience, rate cards and referee reports are provided for you to download, review and complete before adding to your application.

To modify the scheme application, select the **'Edit application'** button.





There are 6 steps in the scheme application:

1. Entity Detail
2. Office detail
3. Prequalification
4. Questionnaire
5. Capabilities
6. Review

Step 1 - Entity detail

Home / Tenders & Schemes / Current Tender List / View Scheme - SCM0631 / Submit Scheme Application - SCM0631

Prequalification Scheme: Performance and Management Services - SCM0005

Who is applying?
 On this screen you are identifying the entity who will, if successful reside on the scheme below.
 Please confirm that you are applying for the correct scheme before proceeding.

1 Entity Detail 2 Office Detail 3 Prequalification 4 Questionnaire 5 Capabilities 6 Review

The **Entity Detail** step provides access to update the following fields:

- ABN
- ACN
- Aboriginal or Torres Strait Islander business status
- Number of employees

Step 2 - Office Detail

Home / Tenders & Schemes / Current Tender List / View Scheme - SCM0631 / Submit Scheme Application - SCM0631

Prequalification Scheme: Performance and Management Services - SCM0005

Who will be the primary contact?
 Please enter details for the primary contact and office (or part) of your business that the services supplied to this scheme would be managed.
 Agencies utilising this scheme will use these details to contact you when they are interested in using your services.

Entity Detail 2 Office Detail 3 Prequalification 4 Questionnaire 5 Capabilities 6 Review

The **Office Detail** step provides access to update the following fields

- Office/Location name
- Contact details
- Address
- Service Area



Step 3 - Prequalification

Home / Tenders & Schemes / Current Tender List / View Scheme - SCM0631 / Submit Scheme Application - SCM0631

Submit Scheme Application - SCM0005

Type of prequalification requested.
Some schemes have multiple levels of prequalification depending on risk and/or value of the work covered.
Please carefully read the options below and select the path you think best matches your capabilities.

Entity Detail
 Office Detail
 3 Prequalification
 4 Questionnaire
 5 Capabilities
 6 Review

The **Prequalification** step provides access to select the method of prequalification:

- Base Level
- Full Prequalification

Step 4 - Questionnaire

Home / Tenders & Schemes / Current Tender List / View Scheme - SCM0631 / Submit Scheme Application - SCM0631

Prequalification Scheme: Performance and Management Services - SCM0005

Tell us about yourself.
To apply for prequalification you must provide details of your organisations status including any professional qualifications, registrations and accreditations.

Entity Detail
 Office Detail
 Prequalification
 4 Questionnaire
 5 Capabilities
 6 Review

The **Questionnaire** step has several expandable sections that must be addressed including:

- Organisational details – update as required
- Company Profile – upload company profile document (core business, company structure, key personnel)
- Insurances
- Standard commercial framework – **this section must be answered by all suppliers.**
- Organisational experience – upload completed organisational experience document
- Referee reports – a minimum of three referee reports are required
- Applicant validation

The standard commercial framework is a new element in the PMS Scheme, and is applicable to all suppliers. All questions must be addressed. **Suppliers that do not complete this section before 30 June may be suspended from the scheme until they do.**

Suppliers that **do not accept the standard commercial framework are listed as non-compliant.** There are additional governance arrangements for agencies wishing to engage a



non-compliant supplier. For engagement types 14 & 15 which are not covered by the standard commercial framework, this section allows the supplier to complete their rate cards to be uploaded.

You must also provide the details of at least three (3) professional service engagements your organisation has completed in the last three (3) years for each engagement type. This information is compiled in the organisational experience template and uploaded in the organisational experience section of step 4.

Step 5 - Capabilities

Home / Tenders & Schemes / Current Tender List / View Scheme - SCM0631 / Submit Scheme Application - SCM0631

Prequalification Scheme: Performance and Management Services - SCM0005

Entity Detail Office Detail Prequalification Questionnaire **5 Capabilities** 6 Review

The capabilities step allows you to select the **engagement type/s** you wish to be assessed against.

NOTE: Requests for additional engagement types will **not be accepted** until the system upgrade has been completed - expected date – July 2018. Your requests will be rejected.

Step 6 - Review

Home / Tenders & Schemes / Current Tender List / View Scheme - SCM0631 / Submit Scheme Application - SCM0631

Prequalification Scheme: Performance and Management Services - SCM0005

Almost There!
By submitting this application you are confirming the completeness and authenticity of the information provided.
By submitting this application you are also confirming you have the authority to do so on behalf of the organisation.
You are able to review your application below, please do so now.
Please note that applications that are not submitted in accordance with the instructions provided may not be accepted.
Once you are confident you have fully satisfied all the requirements and have read and indicated that you agree to the terms and conditions of this scheme click Submit Application...

Entity Detail Office Detail Prequalification Questionnaire Capabilities **6 Review**

The final step in the application modification process is to read the terms and conditions. If you agree, **tick the checkbox 'I agree to the Scheme Terms & Conditions'** and then select the **Submit** application button. The modified application is submitted for review. You will be notified once your application is approved. No further modifications are possible until the review process is completed.



Further Information

Further information is available via email from the [NSW Procurement Service Centre](mailto:nswbuy@finance.nsw.gov.au)² or on 1800 679 289.

Information on the Performance and Management Services Scheme is available on ProcurePoint: <https://www.procurepoint.nsw.gov.au/scm0005>

² <mailto:nswbuy@finance.nsw.gov.au>