

User guide for PHARMAC's tendering e-portal

How to access the e-portal

You can now access the e-portal at: <https://in-tendhost.co.uk/pharmac>

How to register your company

To register, select the yellow **Register** button on the left hand side of the e-portal homepage under the login fields and enter company details, contact details and the details of the primary user. **Additional user details** can be completed to register multiple users. After registration details have been entered, select **Register My Company** to submit a request to register with the e-portal. The primary user will receive an email confirmation once registration has been accepted. Please ensure you add In-Tend Ltd's email address, **support@in-tend.co.uk**, to your safe senders list. You may need to check your spam filter settings to ensure registration messages are received directly to your inbox.

Enhanced password security

A sixteen-character password is required for password strength and there is no requirement for any special characters (e.g. numbers). Passwords and login details must not be shared across multiple users. Additional users can be set up by the primary user, and new users will be prompted to change password upon accessing the portal for the first time.

Logging in

Once you have registered your company, you can enter your login details in the login fields on the left hand side of the e-portal homepage.

Authentication during login

Two-factor authentication is required to login to the e-portal. Upon entering login details, you will receive an email with a security code which you will need to enter in the e-portal along with your email address to gain access.

Expressing interest in a tender

When you have logged in to the e-portal, navigate to the **Tenders** tab and select **Current** to view tenders. Select **View Details** on the tender and then select **Express interest** to view and bid on the annual tender. The tenders that you express interest in will appear in the **Tenders** tab under **My Tenders** when logged in to the e-portal.

Searching for products included in a tender

The **Product Group Search** on the **Bidding** tab is where you can search for products included in the tender. Search by entering a term or partial term into the search bar and clicking **Search**. Alternatively, the **Show All** button will list all Product Groups included in a tender. Selecting any of the **Category** dropdown options will narrow your search to the relevant items in the selected **Category**. In addition, there are three checkboxes that you can select to filter the current search groups to show product groups that contain bids with the following statuses; **Completed**, **Incomplete**, and **Not Started**.

Market information

On the **Bidding** tab under the **Product Group**, you can see which Line Items are being tendered and also the market information for each Line Item as it is documented in Schedule Two of the Invitation to Tender. In the **Sole Supply** column, if Yes is stated, the **Line Item** is currently listed in the Pharmaceutical Schedule with a Sole Supply Status agreement. Please note that **Units** and **Costs** are for community market only and that usage volumes are approximate and indicative only.

Applying bid defaults

Default values (e.g. manufacturer details) can be saved and applied to multiple bids in a Product Group by clicking **Add/Edit Defaults** and entering bid information that is shared across those bids. By selecting **Apply Default Values to All Bids**, the default information will be applied to all current bids within the **Product Group**. Alternatively, you can select the **Apply Default Values** button on an **Item Bid Details** screen to apply defaults to an individual bid.

Mandatory tender documents

The **Dates & Documents** tab allows you to track the remaining time the tender is open, access essential documents, and upload required documentation. In the **Tender Documents Received – Main** section, you will see downloadable files which provide guidance for the tender including the Offer Letter template. In the **My Bids Submission – Main** section, you will be able to upload documents as attachments.

During a 'live' tender, the offer letter template is mandatory and would need to be downloaded, completed and signed prior to uploading it.

Submitting bids and modifying submitted bids prior to the tender deadline

To submit bids, select **Submit Bids** on the **Dates & Documents** tab or the **Bidding** tab. If you have not provided a mandatory document, a message alert will appear. Only complete bids which have all mandatory information completed are able to be submitted, and a message will be displayed to inform you if you have any incomplete bids. It is now possible to modify bids after you have submitted bids, prior to the tender deadline, by selecting **Modify Bids submission** on the **Bidding** tab or **Dates & Documents** tab. Bids must be re-submitted for modifications to apply to bids.

NOTE: PHARMAC does not have access to supplier bidding information in the e-portal whilst the tender is open and PHARMAC gains access to bids only once a tender has closed.

Bid status indicators

On the **Bidding** tab next to each Product Group a coloured status indicator is displayed as either having **incomplete bids** within the Product Group in red or being marked as **complete** in green if all mandatory information for all started bids within that Product Group have been completed.

Improvements made to reviewing bids and bid reports

Select the **Bid Reports** tab to view reports. You can filter bid reporting to view completed, incomplete and not started bids by selecting tick boxes under **Tender Bid Reporting**. Selecting **view** next to a bid on the **Bid Reports** tab allows you to review bid information. You can export all bid information as a PDF or as a CSV file, and you can also export a bid summary PDF to review key bid information.