

PASSPort

Procurement and Sourcing Solutions Portal

Vendor Account Management

<p>Roles Involved:</p> <ul style="list-style-type: none">• Vendors	<p>Summary:</p> <p>Step-by-step instructions on how to manage your vendor account in PASSPort.</p>
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Last Updated: January 31, 2018

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Accessing PASSPort

To access PASSPort and log in using your NYC.ID credentials, go to <http://www.nyc.gov/passport>

Note: While navigating PASSPort you are able to easily increase its font size and readability. To do this, click the “ctrl” and “+” keys simultaneously on your keyboard. Each time you click these keys, your web browser will zoom in and PASSPort will resize accordingly. To reduce PASSPort’s font size, simultaneously click the “ctrl” and “-“ keys.

1. Vendor Account Management Overview

This user manual provides you with step-by-step instructions for submitting both Change Requests and Certification of No Changes in PASSPort, as well as step-by-step instructions for completing day-to-day account management activities, such as enrolling in commodities, self-declaring Minority-Owned/Woman-Owned Business Enterprise (M/WBE) certifications, updating contact information, and uploading Equal Employment Opportunity (EEO) and Doing Business As (DBA) documentation.

After the Vendor Enrollment process is completed, your organization's enrollment information is valid for three years from when it is signed and submitted in PASSPort; however, you are required to confirm your information is accurate and up-to-date with each new contract award. If any of your organization's enrollment information has changed since a prior filing, you must submit a Change Request. Once a Change Request has been submitted, it will follow the same review process as the Vendor Enrollment process and you will receive automated notifications regarding any Change Requests they create. If no information has changed since a prior filing, you may submit a Certification of No Change (a statement that the information on file is current). Both a Change Request and Certification of No Change are submitted within PASSPort. Submitting a Change Request or Certification of No Change restarts the three year clock for your organization's enrollment package.

In addition to submitting a Change Request or a Certification of No Change, fully enrolled vendors are able to enroll in commodities, update their contact information, and upload Equal Employment Opportunity (EEO) and Doing Business As (DBA) documentation in PASSPort to create a more complete vendor profile.

2. Creating and Submitting a Change Request

If your organization needs to update their basic company information, related entities, vendor questionnaire, or principal questionnaires, you can start the Change Request process in PASSPort. Once a Change Request has been submitted, it will follow the same review process as the Vendor Enrollment process. You will receive automated notifications regarding any Change Requests you create and will be notified whenever action is taken on a Change Request.

Follow the below steps to create and submit a Change Request in PASSPort.



1. From the PASSPort homepage, click the “Vendor Information” icon from the Quick Links window.

PASSPort Profile Tasks Contracts Performance Support

Vendor Vendor804 - Filed

Save and Refresh **2** Create a change request

1 Basic Information **1**

2 Contacts **1**

3 Disclosures **1**

4 Documentation **1**

5 Signature **1**

ALERTS **1**▼

⚠ Please upload your Division of Labor Services (DLS) documentation **1**

BASIC COMPANY INFO ▼

PASSPort Vendor Status : Filed EIN **1** : 55555559

Vendor name **1** : Vendor804 Corporate structure : Nonprofit Corporation

Doing Business As : DUNS number **1** :

Annual gross revenue : \$1,000,000-\$2,499,999 FMS Vendor Code **1** :

Business category : Human Services [Click here to visit the Payee Information Portal \(PIP\).](#)

Date this business was formed : 03/08/1999 Website :

Country in which business was formed **1** : UNITED STATES Twitter :

State in which business was formed : New York Facebook :

County in which business was formed : New York Other social media :

National or regional stock exchange or NASDAQ listing :

BUSINESS ADDRESS ▼

Address Line 1 : 123 Street

Address Line 2 :

City : Brooklyn

PRIMARY PLACE OF BUSINESS (IN THE NYC METROPOLITAN AREA) **1**▼

Property Type : Rented/Leased

Address Line 1 : 123 Street

Address Line 2 :

The **Basic Information** tab of your vendor is displayed.

- To start the Change Request process, click the **“Create a change request”** button.

PASSPort Profile Tasks Contracts Performance Support

Vendor change request: Vendor804 - Draft

Save and Refresh Exit Cancel Check Progress

Vendor name: Vendor804
 Doing Business As:
 Annual gross revenue: \$1,000,000-\$2,499,999
 Business category: Human Services
 Date this business was formed: 03/08/1999
 Country in which business was formed: UNITED STATES
 State in which business was formed: New York
 County in which business was formed: New York
 National or regional stock exchange or NASDAQ listing:

Corporate structure: Nonprofit Corporation
 DUNS number:
 FMS Vendor Code:
 Website:
 Twitter:
 Facebook:
 Other social media:

BUSINESS ADDRESS

Address Line 1: 123 Street
 Address Line 2:
 City: Brooklyn
 Country: UNITED STATES
 State/Province: New York
 Zip Code: 11201
 Phone number:

PRIMARY PLACE OF BUSINESS (IN THE NYC METROPOLITAN AREA)

Property Type: Rented/Leased
 Address Line 1: 123 Street
 Address Line 2:
 City: Brooklyn
 Country: UNITED STATES
 State/Province: New York
 Zip Code: 11201

CHANGE REQUEST

Original Vendor Name: Vendor804

Change request reason:

3. Scroll down on the page and enter the reason for the Change Request in the “Change request reason” field.

Note: You should enter a short description of why the Change Request is being created and what information is being updated as part of this Change Request.

PASSPort Profile Tasks Contracts Performance Support

Vendor change request: Vendor804 - Draft

Save and Refresh Exit Cancel Check Progress

1 Basic Information ①

2 Disclosures ① 6

3 Signature ①

ALERTS ①

Sign in the Signature tab 4

BASIC COMPANY INFO

PASSPort Vendor Status: Draft [CR]

Vendor name ①: Vendor804

Doing Business As:

Annual gross revenue: \$1,000,000-\$2,499,999

Business category: Human Services

Date this business was formed: 03/08/1999

Country in which business was formed ①: UNITED STATES

State in which business was formed: New York

County in which business was formed: New York

National or regional stock exchange or NASDAQ listing:

EIN ①: 555555559

Corporate structure: Nonprofit Corporation

DUNS number ①:

FMS Vendor Code ①:

[Click here to visit the Payee Information Portal \(PIP\).](#)

Website:

Twitter:

Facebook:

Other social media:

BUSINESS ADDRESS

Address Line 1: 123 Street

Address Line 2:

City: Brooklyn

Country: UNITED STATES

State/Province: New York

Zip Code: 11201

Phone number:

PRIMARY PLACE OF BUSINESS (IN THE NYC METROPOLITAN AREA) ①

Property Type: Rented/Leased

Address Line 1: 123 Street

Address Line 2:

City: Brooklyn

Country: UNITED STATES

State/Province: New York

Zip Code: 11201

4. If necessary, make changes to your “Basic Company Info,” “Business Address,” and/or “Primary Place of Business (in the NYC Metropolitan Area).”
5. Click the “Save and Refresh” button.
6. Navigate to the Disclosures tab.

PASSPort Profile Tasks Contracts Performance Support

Vendor change request: Vendor804 - Draft

Save and Refresh Exit Cancel Check Progress

1 Basic Information 2 Disclosures 3 Signature

ALERTS

Sign in the Signature tab

INSTRUCTIONS

Questionnaire completion status : Complete
PASSPort Vendor Status : Draft [CR]

On this page, you will finalize your Disclosures by:

1. Answering the 8 sections of the Vendor Questionnaire carefully and completely.
2. Identifying your Principal(s) and/or Officer(s), and completing any associated Principal Questionnaires.
3. Identifying your Parent and/or Controlling entities.
4. Providing your E-Signature, and submitting your Disclosures.

VENDOR QUESTIONNAIRE

Vendor Questionnaire Sections

Section 1: Current Business Information	Edit	○	Complete
Section 2: Business Relationships / Related Entities	Edit	○	Complete
Section 3: Vendor Integrity History	Edit	○	Complete
Section 4: Vendor Financial History	Edit	○	Complete
Section 5: Investigative History	Edit	○	Complete
Section 6: Employment of City-Affiliated Individuals	Edit	○	Complete
Section 7: Site Information	Edit	○	Complete

The **Disclosures** tab is displayed. Since a Change Request has been created, you are able to make changes to both your vendor and principal questionnaires.

In this example, the answer to one of the questions in **Section 5: Investigative History** needs to be updated.

7. Click on the **“Edit”** button to open Section 5.

Investigative History 10

9

Save Save and Previous Save and Next

SECTION 5: INVESTIGATIVE HISTORY ▾

1 → 2 → 3 → 4 → 5 → 6 → 7 → 8

Section Status : Complete
 Selecting "Yes" requires that you add a row.

INVESTIGATIVE HISTORY ▾

Investigations ▾

1. In the past five (5) years, has the submitting vendor, or any of the submitting vendor's affiliates, or any individual currently or within that period serving as a principal owner, officer, or managerial employee, been investigated by any government agency, including, but not limited to, federal, state, and local regulatory agencies?

No

Convictions ▾

2. Has the submitting vendor, any affiliate, or any of their current or former principal owners, officers, or managerial employees been convicted of a misdemeanor and/or found in violation of any administrative, statutory, or regulatory provisions in the past five (5) years?

Yes Vendor 8

+ Add Row

Type	Violation	Misdemeanor Conviction	Summary of Finding	Date of Action	Charging Agency
Vendor		<input type="checkbox"/>			

0 Result(s)

10

8. In this example, we have changed the answer of the second question to Yes and added the appropriate supplemental information by clicking the "Add Row" button.

9. Once you are done making changes to a section of the questionnaire, click the "Save" button.

10. Click the "X" icon to close the questionnaire.

PASSPort Profile Tasks Contracts Performance Support

Vendor change request: Vendor804 - Draft

Save and Refresh Exit Cancel **Check Progress**

11

1 Basic Information
2 Disclosures
3 Signature

ALERTS

⚠ Sign in the Signature tab

INSTRUCTIONS

Questionnaire completion status : Complete
 PASSPort Vendor Status : Draft [CR]

On this page, you will finalize your Disclosures by:

1. Answering the 8 sections of the Vendor Questionnaire carefully and completely.
2. Identifying your Principal(s) and/or Officer(s), and completing any associated Principal Questionnaires.
3. Identifying your Parent and/or Controlling entities.
4. Providing your E-Signature, and submitting your Disclosures.

VENDOR QUESTIONNAIRE

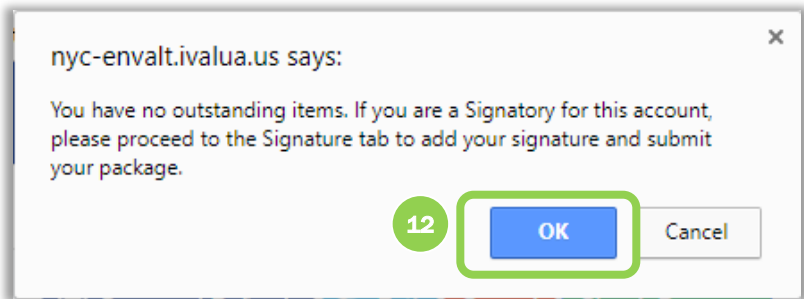
Vendor Questionnaire Sections

Section 1: Current Business Information	Edit	✔	Complete
Section 2: Business Relationships / Related Entities	Edit	✔	Complete

If necessary, you could also make changes to your **Principal Questionnaires**.

In this example, no changes were made; however, the process to make changes is identical to making changes to your **Vendor Questionnaire**.

11. Once you are finished with making changes to your **Basic Information** and **Disclosures** click the **“Check Progress”** button.



12. Click the “OK” button to confirm the submission.

PASSPort Profile Tasks Contracts Performance Support

Vendor change request: Vendor804 - Ready To Submit

Cancel Submit Change Request

1 Basic Information ⓘ
2 Disclosures ⓘ
3 Signature ⓘ

ALERTS ⓘ

- Sign in the Signature tab ⓘ

VENDOR ELECTRONIC SIGNATURE ▾

+ Add Signature 14

Vendor Enrollment Signature ▾

Att.	Owner	Status	Signature Date (your local time)
	Maxine Brody	Accepted	10/27/2017 08:18:02

1 Result(s)

Vendor Enrollment Signature for Certification of No Change ▾

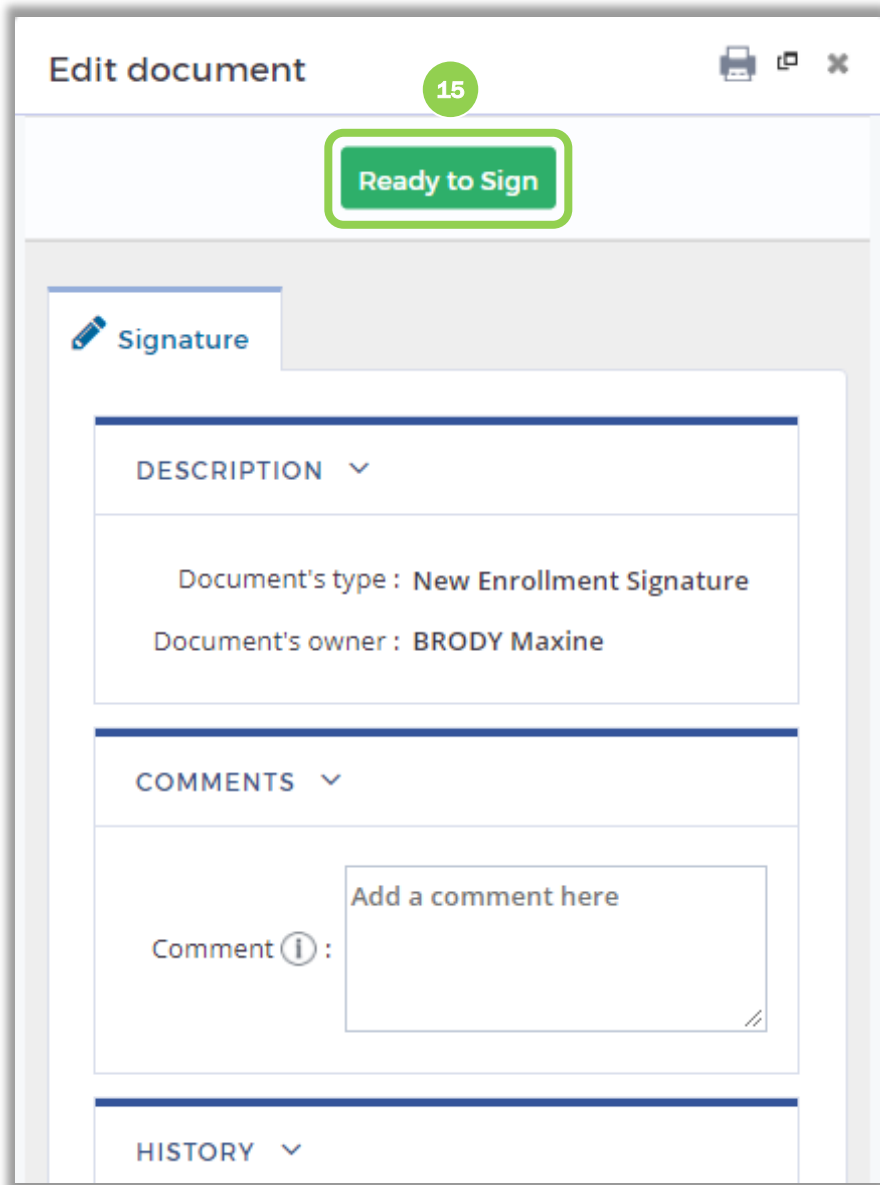
0 Result(s)

A new alert is displayed that indicates a vendor signature is required in order to submit.

13. Navigate to the **Signature** tab.

14. Click the **“Add Signature”** button.

Please note that only users with a *Signatory* role will have access to this functionality. This role is defined on the **Contacts** tab. If you do not have a *Signatory* role, the information you have entered has been saved and will be accessible to the *Signatory* user when they log in.



15. Click the “Ready to Sign” button.

Edit document : Vendor Signature 19 ✕

Cancel Sign 18

Signature

DESCRIPTION ▾

Document's type : New Enrollment Signature
Document's owner :

ELECTRONIC SIGNATURE ▾

PASSPort Questionnaire Certification ▾

These questionnaire submissions, including the Vendor Questionnaire(s), and Principal Questionnaire(s), (collectively "Questionnaires"), are being submitted on behalf of an entity that desires to do business with the City of New York (the "Submitting Vendor"). A materially false statement made in connection with these Questionnaires may result in a determination that the Submitting Vendor is non-responsible pursuant to the Procurement Policy Board Rules ("PPB Rules") of the City of New York (the "City"), and, in addition, may subject the person submitting these Questionnaires and the

16 I certify all of above :

NYC.ID Email ⓘ : passporttraining@mailinator.com

17 NYC.ID Password :

Signature Date :

16. Click the "I certify all of above" checkbox.
17. Enter your "NYC.ID Password."
18. Click the "Sign" button to add your e-Signature.
19. Click the ✕ icon to close the window.

PASSPort Profile Tasks Contracts Performance Support

Vendor change request: Vendor804 - Ready To Submit 20

Cancel Submit Change Request

1 Basic Information ⓘ
2 Disclosures ⓘ
3 Signature ⓘ

ALERTS ⓘ

Sign in the Signature tab ⓘ

VENDOR ELECTRONIC SIGNATURE ▾

+ Add Signature

Vendor Enrollment Signature ▾

Att.	Owner	Status	Signature Date (your local time)
	Maxine Brody	Accepted	10/27/2017 08:18:02

2 Result(s)

Vendor Enrollment Signature for Certification of No Change ▾

0 Result(s)

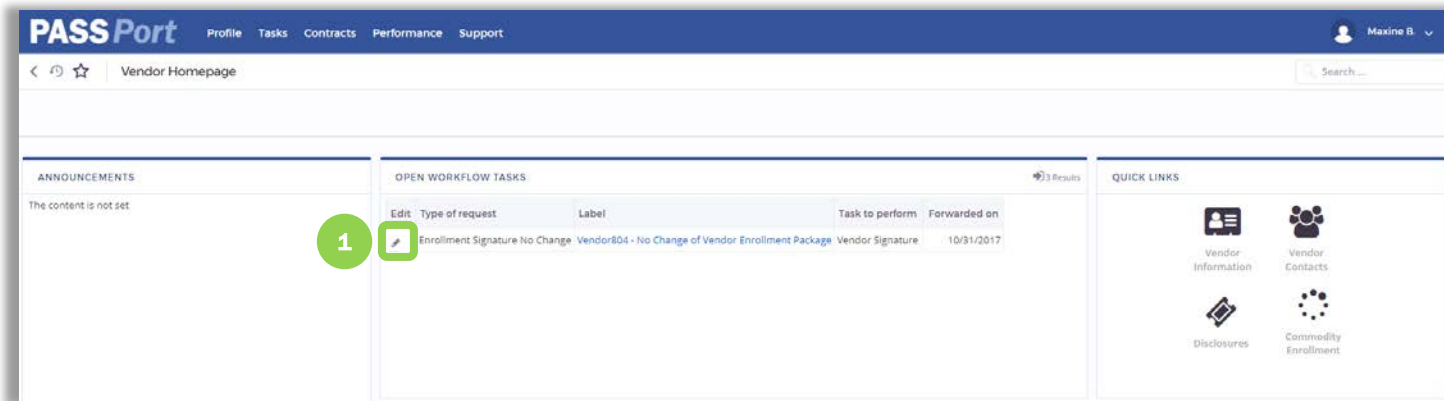
20. Click the “**Submit Change Request**” button to submit the change request for review.

Once a change request has been submitted, it will follow the same review process as the Vendor Enrollment process. You will receive automated notifications regarding any change requests you create. Approved change requests restart the three-year validity clock on your vendor enrollment information.

3. Submitting a Certification of No Change


Whenever your organization is awarded a new contract or the three-year clock on your organization’s vendor enrollment package has expired, you may submit a Certification of No Change in PASSPort. Submit the Certification of No Change if you want to declare that your organization’s information on file is current and no changes need to be made. Submitting a Certification of No Change restarts the three-year clock on an enrollment package’s validity.

Follow the steps below to submit a Certification of No Change in PASSPort.



1. Whenever a Certification of No Change is requested, you will receive an e-mail notification as well as a task in PASSPort.

From the PASSPort homepage, navigate to the request for a Certification of No Change through the Open Workflow Tasks window on the page.

The Certification of No Change request will have a **“Task to perform”** of **Vendor Signature**. Open the request by clicking the  icon.

2. If your enrollment information has not changed since it was last submitted, click the **“I certify all of above”** checkbox.
3. Enter your **“NYC.ID Password.”**
4. Click the **“Sign”** button to add your e-Signature and submit the CNC.

5. Click the **“Confirm”** button. Entering text is not required.

Note: *If any of your enrollment information has changed and needs to be updated, click the **“Change Request Needed”** button to start the Change Request process.*

4. Enrolling in Commodities

Enrolling in commodities in PASSPort allows a vendor to increase their awareness of contracting opportunities with the City. When enrolling in commodities, vendors should enroll in commodities that best reflect their organization's current capacity to deliver relevant goods and/or services. Commodity enrollments can be updated at any time as vendors expand or otherwise change the goods and/or services they offer.

Follow the steps below to enroll in commodities in PASSPort. Please note that this process used to be completed in the Payee Information Portal (PIP).



1. From the PASSPort homepage, click the “Commodity Enrollment” icon from the Quick Links window.

The screenshot shows the PASSPort interface for a vendor profile. The top navigation bar includes 'Profile', 'Tasks', 'Contracts', 'Performance', and 'Support'. The breadcrumb trail indicates the user is in the 'Vendor Vendor804 - Filed' section. Below the navigation are buttons for 'Save and Refresh' and 'Create a change request'. The left sidebar contains a menu with five items: '1 Basic Information', '2 Contacts', '3 Disclosures', '4 Documentation', and '5 Signature'. The '4 Documentation' item is selected and highlighted. The main content area is divided into sections. The first section is 'ALERTS', which contains a warning message: 'Please upload your Division of Labor Services (DLS) documentation'. Below this is a search bar with fields for 'Keywords', 'State to date' (set to 10/31/2017), and a 'Display archived documents' checkbox. The second section is 'COMMODITY ENROLLMENT', which includes a dropdown arrow and a paragraph explaining that documentation is required for commodity enrollment. A green circle with the number '2' is placed over the 'Add Commodity' button in this section. The third section is 'EQUAL EMPLOYMENT OPPORTUNITY DOCUMENT (EEO)', which includes a paragraph explaining where to upload EEO documentation and a link to the Small Business Services (SBS) website. A blue 'Add EEO Document' button is located at the bottom of this section.

The **Documentation** tab of your vendor profile is displayed. On this page you can enroll in commodities and submit EEO, COI, and DBA documentation.

2. To enroll in a commodity, click the **“Add Commodity”** button.

Edit document : Commodity Enrollment

Save Close

Document

DESCRIPTION ▾

Document's type : Justification

Document's owner : BRODY Maxine

Commodity ⓘ : ... 3

Document's name :

Document ⓘ : Drag and Drop to Add a File


COMMENTS ▾

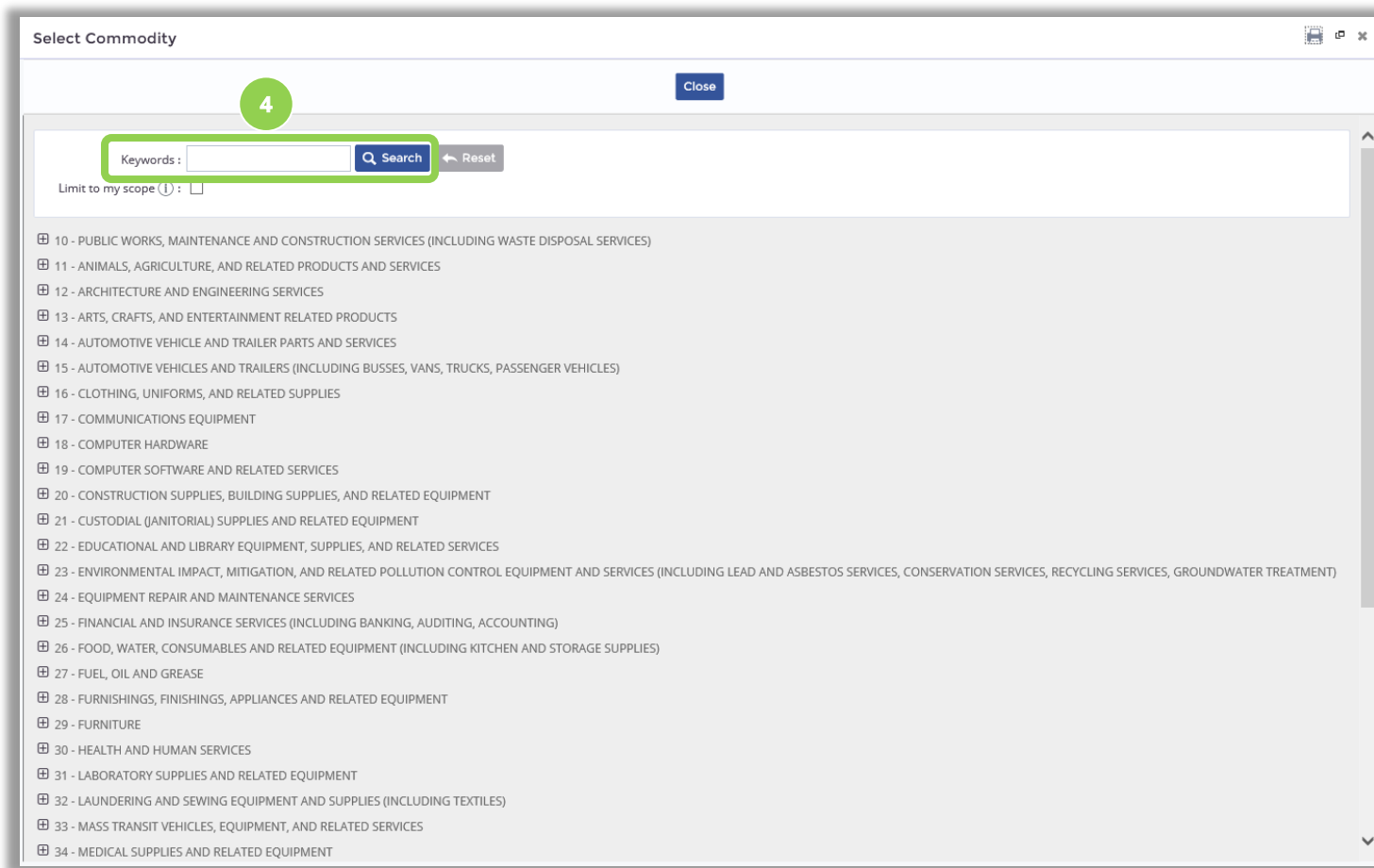
Comment ⓘ : Add a comment here

HISTORY ▾

Created :



Modified :

3. Click the  icon to search for and select a "Commodity."



4. Enter your search terms in the “Keywords” field and click the “Search” button to search for a commodity.

***Note:** You can also browse for a commodity by using*

the  icon. Once you have found the commodity you want to enroll in click the  icon. In addition, you still able to search for commodity codes by the 3-digit NIGP codes that are used in the Payee Information Portal (PIP).

Edit document : Commo 8 Enrollment 9

Save Close Delete Submit

Document

DESCRIPTION

Document's type : Justification
 Document's owner : BRODY Maxine
 Commodity ⓘ : 952 - HUMAN SERVICES ...
 5 Document's name : Example
 6 Document ⓘ : Drag and Drop to Add a File
 Attachment.docx

COMMENTS

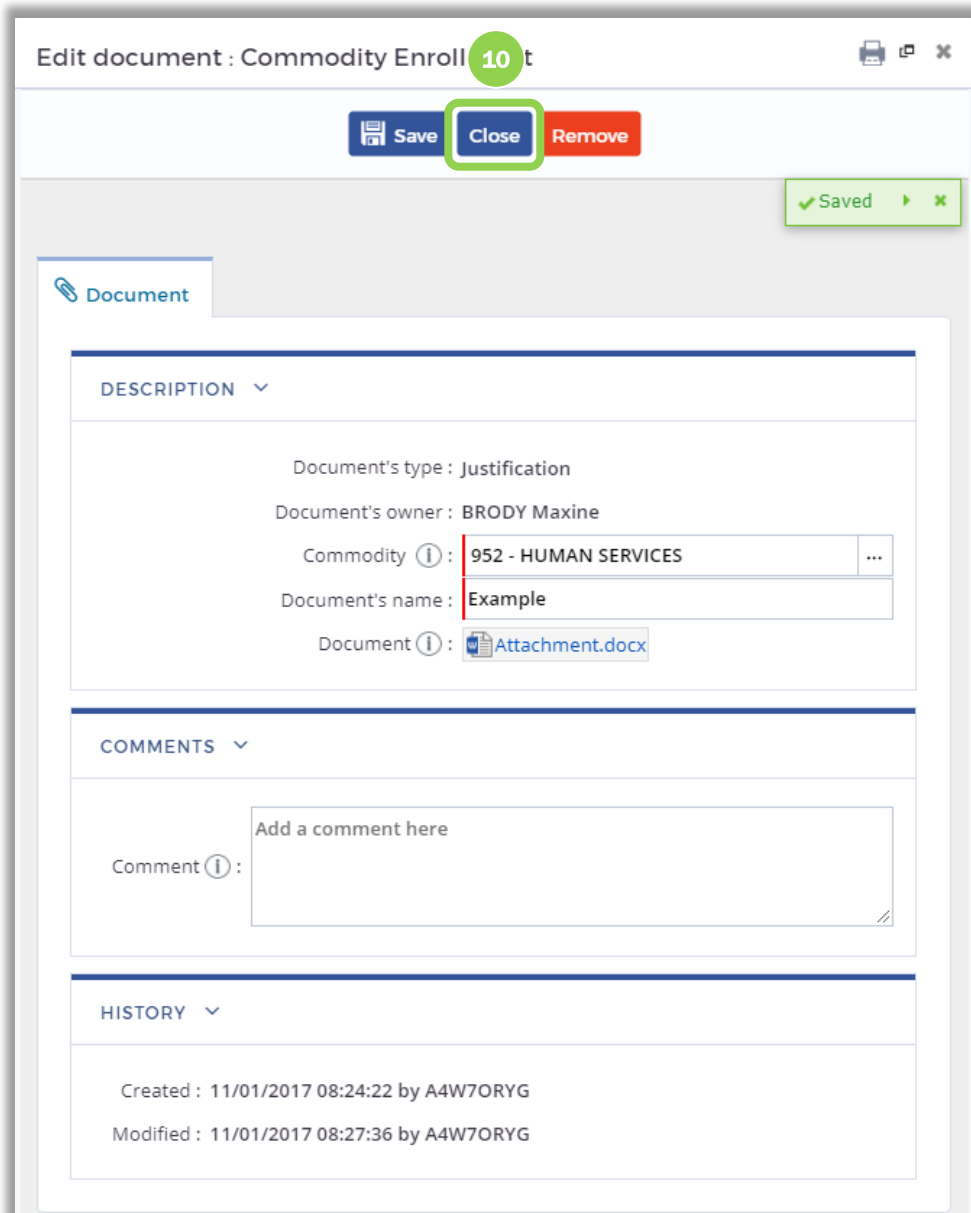
7 Comment ⓘ : Add a comment here

HISTORY

Created : 11/01/2017 08:24:22 by A4W7ORYG
 Modified :

Whenever you enroll in a commodity, you are required to provide documentation that displays that your organization can supply this commodity. Examples of acceptable documentation are a license or certification.

5. Enter the name of the document that is being uploaded in the **“Document’s name”** field.
6. Click the **“Drag and Drop to Add a File”** button to search for and select a document.
7. Enter any necessary comments in the **“Comments”** field to elaborate on the documentation being uploaded.
8. Click the **“Save”** button.
9. Click the **“Submit”** button.



10. Click the “Close” button to finish the commodity enrollment.

PASSPort Profile Tasks Contracts Performance Support

Vendor Vendor804 - Filed

Save and Refresh Create a change request

1 Basic Information 2 Contacts 3 Disclosures 4 Documentation 5 Signature

ALERTS

Please upload your Division of Labor Services (DLS) documentation

Keywords: State to date: 11/01/2017 Display archived documents: Search Reset

COMMODITY ENROLLMENT

Whenever you enroll in a commodity, you are required to provide documentation which indicates your organization can supply that commodity. Examples of acceptable documentation include a license, certification or invoice.

11 **Add Commodity**

Att.	Owner	Status	Commodity	Title
	Maxine Brody	Accepted	952 - HUMAN SERVICES	Example

1 Result(s)

EQUAL EMPLOYMENT OPPORTUNITY DOCUMENT (EEO)

This is where you upload the Equal Employment Opportunity (EEO) documentation. Please visit the Small Business Services (SBS) website for guidance: <http://www.nyc.gov/html/sbs/html/procurement/dls.shtml>

You have successfully enrolled in a commodity. The documentation you submitted will be reviewed by the City.

- Continue to enroll in additional commodities as necessary by clicking the “Add Commodity” button.

5. Self-Declaring Minority-Owned/Woman-Owned Business Enterprise (M/WBE) Certifications

Follow the steps below to self-declare Minority-Owned/Woman-Owned Business Enterprise (M/WBE) certifications in PASSPort. Please note that self-declaring M/WBE certifications in PASSPort does not replace the certification process with NYC Small Business Services (SBS); however, self-declaring in PASSPort will allow SBS to run reports on self-declared M/WBE vendors and proactively reach out to them to start the SBS certification process. Once the SBS certification process is completed, PASSPort will update the *Self-declared* status to *Certified*.



1. From the PASSPort homepage, click the “Vendor Information” icon from the Quick Links window.

PASSPort Profile Tasks Contracts Performance Support

Vendor Vendor804 - Filed

Save and Refresh Create a change request

- 1 Basic Information ⓘ
- 2 Contacts ⓘ
- 3 Disclosures ⓘ
- 4 Documentation ⓘ
- 5 Signature ⓘ

ALERTS ⓘ

⚠ Please upload your Division of Labor Services (DLS) documentation ⓘ

BASIC COMPANY INFO ▾

PASSPort Vendor Status : Filed	EIN ⓘ : 55555559
Vendor name ⓘ : Vendor804	Corporate structure : Nonprofit Corporation
Doing Business As :	DUNS number ⓘ :
Annual gross revenue : \$1,000,000-\$2,499,999	FMS Vendor Code ⓘ :
Business category : Human Services	Click here to visit the Payee Information Portal (PIP).
Date this business was formed : 03/08/1999	Website :
Country in which business was formed ⓘ : UNITED STATES	Twitter :
State in which business was formed : New York	Facebook :
County in which business was formed : New York	Other social media :
National or regional stock exchange or NASDAQ listing :	

BUSINESS ADDRESS ▾

Address Line 1 : 123 Street
Address Line 2 :

PRIMARY PLACE OF BUSINESS (IN THE NYC METROPOLITAN AREA) ⓘ

Property Type : Rented/Leased
Address Line 1 : 123 Street

The **Basic Information** tab of your vendor profile is displayed.

2. Scroll down on the page to see the M/WBE Certifications window.

PASSPort Profile Tasks Contracts Performance Support

< ⌂ ☆ Vendor Vendor804 - Filed

Save and Refresh Create a change request

1 Basic Information ①

2 Contacts ①

3 Disclosures ①

4 Documentation ①

5 Signature ①

BUSINESS ADDRESS ▾

Address Line 1 : 123 Street
 Address Line 2 :
 City : Brooklyn
 Country : UNITED STATES
 State/Province : New York
 Zip Code : 11201
 Phone number :

PRIMARY PLACE OF BUSINESS (IN THE NYC METROPOLITAN AREA) ① ▾

Property Type : Rented/Leased

Address Line 1 : 123 Street
 Address Line 2 :
 City : Brooklyn
 Country : UNITED STATES
 State/Province : New York
 Zip Code : 11201

VENDOR M/WBE CERTIFICATIONS ▾

3 [+ Declare New Certification](#)




0 Result(s)




VENDOR CHANGE REQUEST ▾

	Creation date	Requester	Reason	Status	Validation date	Last Actor ①
	10/30/2017	Maxine Brody	Example change request reason.	Filed	10/31/2017	Maxine Brody


1 Result(s)


- To declare a new M/WBE certification, click the **“Declare New Certification”** button.

M/WBE Certifications (declared by Vendor)   

 Save  Save and Close  Close

VENDOR SELF-DECLARATION ▾

Vendor ID : 1876940 

Self-Declared Certification : 


PASSPORT SYSTEM INFORMATION ▾

Certification Type :

Validity :

Status Code :

Certification Initiation Date : 11/02/2017 08:52:15 (your local time)

4. Click the  icon to search for and select a "Self-Declared Certification."

Vendor Diversity Classification

Close


Keywords :

Please select from the options below: ⓘ

- ✚ DBE certified with Metropolitan Transportation Authority (MTA)
- ✚ DBE certified with New York Department of Transportation
- ✚ DBE certified with Niagara Frontier Transportation Authority
- ✚ DBE certified with The Port Authority of New York and New Jersey
- ✚ Emerging Business (Certified)
- ✚ Exempt from MWBE Rpt Card
- ✚ Local Business (Certified)
- ✚ M/WBE certified with New York and New Jersey Minority Supplier Development Council
- ✚ M/WBE certified with New York City School Construction Authority
- ✚ M/WBE certified with New York State Department of Economic Development, Division of Minority and Women's Business Development (DMWBD)
- ✚ M/WBE certified with The Port Authority of New York and New Jersey
- ✚ M/WBE certified with Women Presidents' Educational Organization
- ✚ Minority Owned (Certified)
- ✚ Self-Identified Minority-Owned
- ✚ Self-Identified Veteran-Owned

<< < 1 2 > 18 Result(s)

5

- Search for and select the self-declared M/WBE certification you wish to add. When you have found the certification you wish to add, click the  icon.

Note: Self-declaring a certification here does not replace the certification process with Small Business Services (SBS). Once you self-declare a certification in PASSPort, SBS will contact you with next steps.

M/WBE Certifications (declared by Vendor) Print Close

6

Save Save and Close Close

VENDOR SELF-DECLARATION ▾

Vendor ID : 1876940

Self-Declared Certification : **Self-Identified Minority-Owned** ...

PASSPORT SYSTEM INFORMATION ▾

Certification Type :

Validity :

Status Code :

Certification Initiation Date : 11/02/2017 08:52:15 (your local time)

6. Click the “Save and Close” button.

PASSPort Profile Tasks Contracts Performance Support

Vendor Vendor804 - Filed

Save and Refresh Create a change request

Date this business was formed : 03/08/1999

Country in which business was formed (i) : UNITED STATES
 State in which business was formed : New York
 County in which business was formed : New York
 National or regional stock exchange or NASDAQ listing :

Twitter :
 Facebook :
 Other social media :

BUSINESS ADDRESS (i) (v)

Address Line 1 : 123 Street
 Address Line 2 :
 City : Brooklyn
 Country : UNITED STATES
 State/Province : New York
 Zip Code : 11201
 Phone number :

PRIMARY PLACE OF BUSINESS (IN THE NYC METROPOLITAN AREA) (i) (v)

Property Type : Rented/Leased

Address Line 1 : 123 Street
 Address Line 2 :
 City : Brooklyn
 Country : UNITED STATES
 State/Province : New York
 Zip Code : 11201

VENDOR M/WBE CERTIFICATIONS (i) (v)

7 [+ Declare New Certification](#)

Self-declared Certification (by the Vendor)	Certification Initiation Date	Start Date	End Date	Minority Type	
x Self-identified Minority-Owned	11/15/2017				<input type="checkbox"/>
1 Result(s)					

You have successfully self-declared an M/WBE certification.

- Continue to self-declare additional M/WBE certifications as necessary by clicking the “**Declare New Certification**” button.

Note: After you self-declare an M/WBE certification, NYC SBS will reach out to you confirm the certification.

6. Updating Vendor Contact Information

Follow the steps below to add additional contacts to your vendor profile or revise existing vendor contact information in PASSPort.



1. From the PASSPort homepage, click the “Vendor Contacts” icon from the Quick Links window.

PASSPort Profile Tasks Contracts Performance Support Maxine B.

Vendor Vendor804 - Filed

Save and Refresh Create a change request

1 Basic Information
 2 Contacts
 3 Disclosures
 4 Documentation
 5 Signature

ALERTS
 Please upload your Division of Labor Services (DLS) documentation

CEO (OR EQUIVALENT) INFORMATION
 First Name: Nina Last Name: Mach
 Email: nina@mailinator.com Phone Number: 718-555-6543


VENDOR CONTACTS

All principal owners and/or officers must be added as contacts on the Contacts tab to identify them as principal owners and/or officers and complete their associated questionnaires.
 A principal owner is defined as any individual, partnership, joint venture, or corporation that holds a 10% or greater ownership interest in the enrolling vendor.
 An officer is defined as any individual who serves as or performs the functions of chief executive officer, chief financial officer, or chief operating officer, or their equivalents, of the enrolling vendor, without regard to such individual's title.

Add a Contact

ID	Name	Email	Role
2	Brody Maxine	passporttraining@mailinator.com	Signatory Vendor admin
x	Contact Second	second@mailinator.com	Contributor
x	Herman Nina	first@mailinator.com	Signatory

The **Contacts** tab of your vendor profile is displayed. On this page you can modify contact information and roles for existing contacts as well as add new contacts.

- To edit an existing contact, click the  icon.

Contact Management 3 🖨️ 🗨️ ✕

📄 Save
Close
Save and Close

CONTACT INFORMATION ▾

Salutation:

First name [ⓘ]:

Last name [ⓘ]:


Email:

Phone [ⓘ]:

Cell Phone [ⓘ]:

Title:

Default Language:

Photo:  Drag and Drop to Add a File

Information ▾

Created by Brody Maxine on 10/26/2017 09:32:14
 Modified by Brody Maxine on 10/26/2017 09:32:14

Last connection >

Vendors: Vendor804

Status: Active

BUSINESS ADDRESS ▾

Address Line 1:

Address Line 2:

City:

Country:

State/Province: ...

Zip Code:

- The contact information is displayed. Make any necessary changes such as adding a **“Phone”** and then click the **“Save and Close”** button.

Please note if a contact has already logged into PASSPort using their own NYC.ID, a user with the *vendor admin* role will not be able to edit the contact’s email address.

PASSPort Profile Tasks Contracts Performance Support Maxine B.

Vendor Vendor804 - Filed Search ...

Save and Refresh Create a change request

1 Basic Information

2 **Contacts**

3 Disclosures

4 Documentation

5 Signature

ALERTS

Please upload your Division of Labor Services (DLS) documentation

CEO (OR EQUIVALENT) INFORMATION

First Name: Nina Last Name: Mach
 Email: nina@mailinator.com Phone Number: 718-555-6543

VENDOR CONTACTS

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 A principal owner is defined as any individual, partnership, joint venture, or corporation that holds a 10% or greater ownership interest in the enrolling vendor.
 An officer is defined as any individual who serves as or performs the functions of chief executive officer, chief financial officer, or chief operating officer, or their equivalents, of the enrolling vendor, without regard to such individual's title.

4 Add a Contact

	Name	Email	Role
	Brody Maxine	passporttraining@mailinator.com	Signatory Vendor admin
x	Contact Second	second@mailinator.com	Contributor
x	Herman Nina	first@mailinator.com	Signatory

- Click the “Add a Contact” button to add a new contact.

Contact Management 6

Save Close **Save and Close**

CONTACT INFORMATION ▾

Salutation: ▾

5 First name (i):

Last name (i):


Email:

Phone (i):

Cell Phone (i):

Title:

Default Language: English ▾

Photo:  Drag and Drop to Add a File

Status: Active

BUSINESS ADDRESS ▾

Address Line 1: 123 Street

Address Line 2:

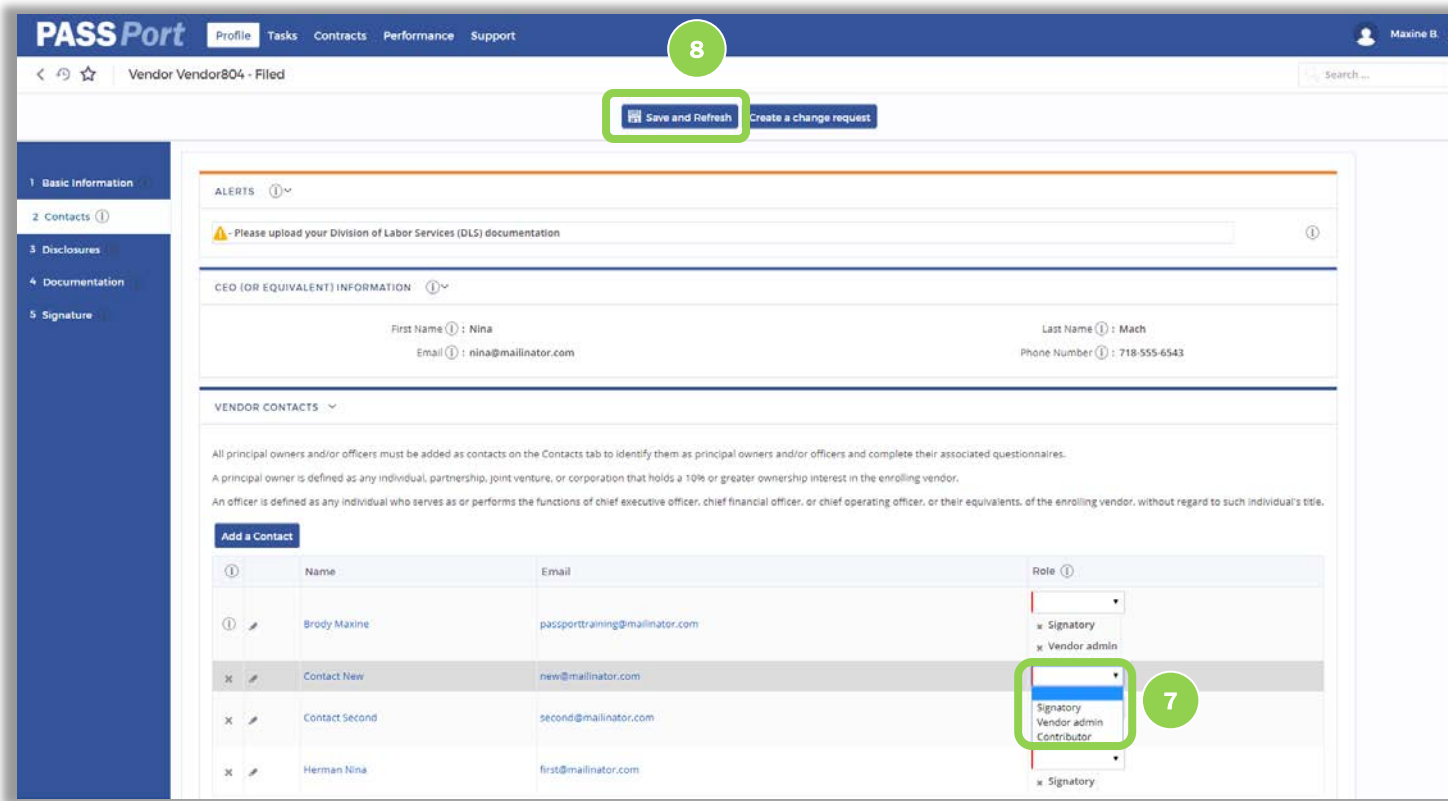
City: Brooklyn

Country: UNITED STATES ▾

State/Province: New York ...

Zip Code: 11201

5. Enter the following information:
 - “**First Name**” of the contact.
 - “**Last Name**” of the contact.
 - “**Email**” of the contact.
6. Click the “**Save and Close**” button.



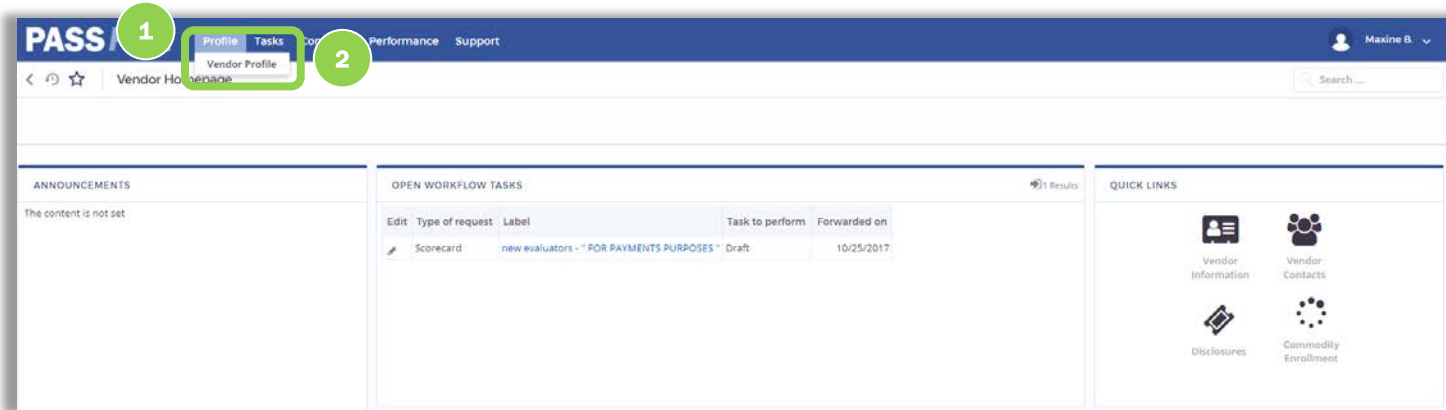
7. Select a “**Role**” for the contact that was added. Multiple roles can be selected for a contact.

- *Vendor admin*: Manages access to PASSPort and updates basic account information.
- *Signatory*: Is officially authorized to sign and submit information on behalf of the vendor organization.
- *Contributor*: Supports completion of forms, but is not authorized to submit information to the City.

8. Click the “**Save and Refresh**” button. At this point, you have successfully updated an existing contact and added a new contact. Continue to update and add new contacts as necessary.

7. Uploading Equal Employment Opportunity (EEO) and Doing Business As (DBA) Documentation

Follow the steps below to upload Equal Employment Opportunity (EEO) and Doing Business As (DBA) documentation in PASSPort.



1. From any page in PASSPort click the “Profile” button.
2. Select “Vendor Profile” from the drop-down menu.

PASSPort Profile Tasks Contracts Performance Support

Vendor Vendor804 - Filed

Save and Refresh Create a change request

- 1 Basic Information
- 2 Contacts
- 3 Disclosures
- 4 Documentation**
- 5 Signature

ALERTS

Please upload your Division of Labor Services (DLS) documentation

BASIC COMPANY INFO

PASSPort Vendor Status : Filed
 Vendor name : Vendor804
 Doing Business As :
 Annual gross revenue : \$1,000,000-\$2,499,999
 Business category : Human Services
 Date this business was formed : 03/08/1999
 Country in which business was formed : UNITED STATES
 State in which business was formed : New York
 County in which business was formed : New York
 National or regional stock exchange or NASDAQ listing :

EIN : 555555559
 Corporate structure : Business Corporation
 DUNS number :
 FMS Vendor Code :
 Website :
 Twitter :
 Facebook :
 Other social media :

Click here to visit the Payee Information Portal (PIP).

BUSINESS ADDRESS

Address Line 1 : 123 Street
 Address Line 2 :

PRIMARY PLACE OF BUSINESS (IN THE NYC METROPOLITAN AREA)

Property Type : Rented/Leased
 Address Line 1 : 123 Street

3. Navigate to the **Documentation** tab of your vendor profile.

PASSPort Profile Tasks Contracts Performance Support

Vendor Vendor804 - Filed

Save and Refresh Create a change request

⚠ - Please upload your Division of Labor Services (DLS) documentation ⓘ

Keywords: State to date: 11/15/2017 Display archived documents:

COMMODITY ENROLLMENT ▾

Whenever you enroll in a commodity, you are required to provide documentation which indicates your organization can supply that commodity. Examples of acceptable documentation include a license, certification or invoice.

Att.	Owner	Status	Commodity	Title
	Maxine Brody	Accepted	909 - BUILDING CONSTRUCTION SERVICES, NEW	BUILDING 909
	Maxine Brody	Accepted	005 - ABRASIVES	ABRASIVES
	Maxine Brody	Accepted	952 - HUMAN SERVICES	Example

3 Result(s)

EQUAL EMPLOYMENT OPPORTUNITY DOCUMENT (EEO) ▾

This is where you upload the Equal Employment Opportunity (EEO) documentation. Please visit the Small Business Services (SBS) website for guidance: <http://www.nyc.gov/html/sbs/html/procurement/dls.shtml>




To expedite the processing of your documentation, please upload documents as readable .PDF files whenever possible. Scanned paper documentation will result in potentially longer processing times.



4


0 Result(s)

The **Documentation** tab of your vendor profile is displayed. On this page you can enroll in commodities and submit EEO, COI, and DBA documentation.

- To add EEO documentation, click the **“Add EEO Document”** button.

Edit document : Equal Employment Opportu   

8  


 Document

DESCRIPTION ▾

5 Document's type :

Document's owner : BRODY Maxine

6 Document's name :

7 Document ⓘ :  Drag and Drop to Add a File

COMMENTS ▾

Comment ⓘ :

HISTORY ▾

Created :

Modified :

5. Select the “**Document’s type**” (i.e., *DLS Report, Compliance Letter, Exemption*).
6. Enter the “**Document’s name.**”
7. Click the “**Drag and Drop to Add a File**” button to search for and select an attachment.
8. Click the “**Save**” button.

Edit document : Equal Employment Opportunity Document (EEO)

Save Cancel Close **Submit** 9

✓ Saved ✕

Document

DESCRIPTION ▾


Document's type : Equal Employment Opportunity Document (EEO) / DLS Report ▾


Document's owner : BRODY Maxine

Document's validity from : 11/15/2017

to :

Document's name : DLS Report

Document ⓘ :  Drag and Drop to Add a File

 Attachment.docx

COMMENTS ▾

Comment ⓘ :

HISTORY ▾

Created : 11/15/2017 14:43:57 by A4W7ORYG

Modified :

9. Click the **“Submit”** button to submit your EEO documentation for review.

Please note the EEO document will remain in *In Review* status.

PASSPort Profile Tasks Contracts Performance Support

Vendor Vendor804 - Filed

Save and Refresh Create a change request

3 Result(s)

1 Basic Information
2 Contacts
3 Disclosures
4 Documentation
5 Signature

EQUAL EMPLOYMENT OPPORTUNITY DOCUMENT (EEO)

This is where you upload the Equal Employment Opportunity (EEO) documentation. Please visit the Small Business Services (SBS) website for guidance: <http://www.nyc.gov/html/sbs/html/procurement/dls.shtml>

To expedite the processing of your documentation, please upload documents as readable .PDF files whenever possible. Scanned paper documentation will result in potentially longer processing times.

+ Add EEO Document

Att.	Owner	Status	Title
	Maxine Brody	In Review	DLS Report

1 Result(s)

MISCELLANEOUS DOCUMENTS

+ Add Document(s)

Att.	Owner	Status	Title
	Maxine Brody	Accepted	Certificate of Incorporation

1 Result(s)

10

Your EEO documentation has been submitted and will be reviewed by the Department of Labor Services (DLS). DLS will reach out to you if they have any questions regarding your documentation. Once your documentation has been approved, you will receive an email notification and its status in PASSPort will be updated to *Approved*.

- To add a DBA document, click the **“Add Documents”** button in the Miscellaneous Document section.

Edit document : Miscellaneous 14

Save Close

Document

DESCRIPTION ▾

11 Document's type :

Document's owner : BRODY Maxine

12 Document's name :

13 Document ⓘ :

COMMENTS ▾




Comment ⓘ :





HISTORY ▾

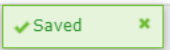

Created :


Modified :

11. Select the “Document’s type” (i.e., *Doing Business as*).
12. Enter the “Document’s name.”
13. Click the “Drag and Drop to Add a File” button to search for and select an attachment.
14. Click the “Save” button

Edit document : Miscellaneous 15   

 Save  Cancel  Close  Submit

 Saved 

 Document

DESCRIPTION ▾

Document's type :


Document's owner : BRODY Maxine



Document's validity from : 11/15/2017

to :

Document's name :

Document ⓘ :

 Drag and Drop to Add a File

  Attachment.docx

COMMENTS ▾

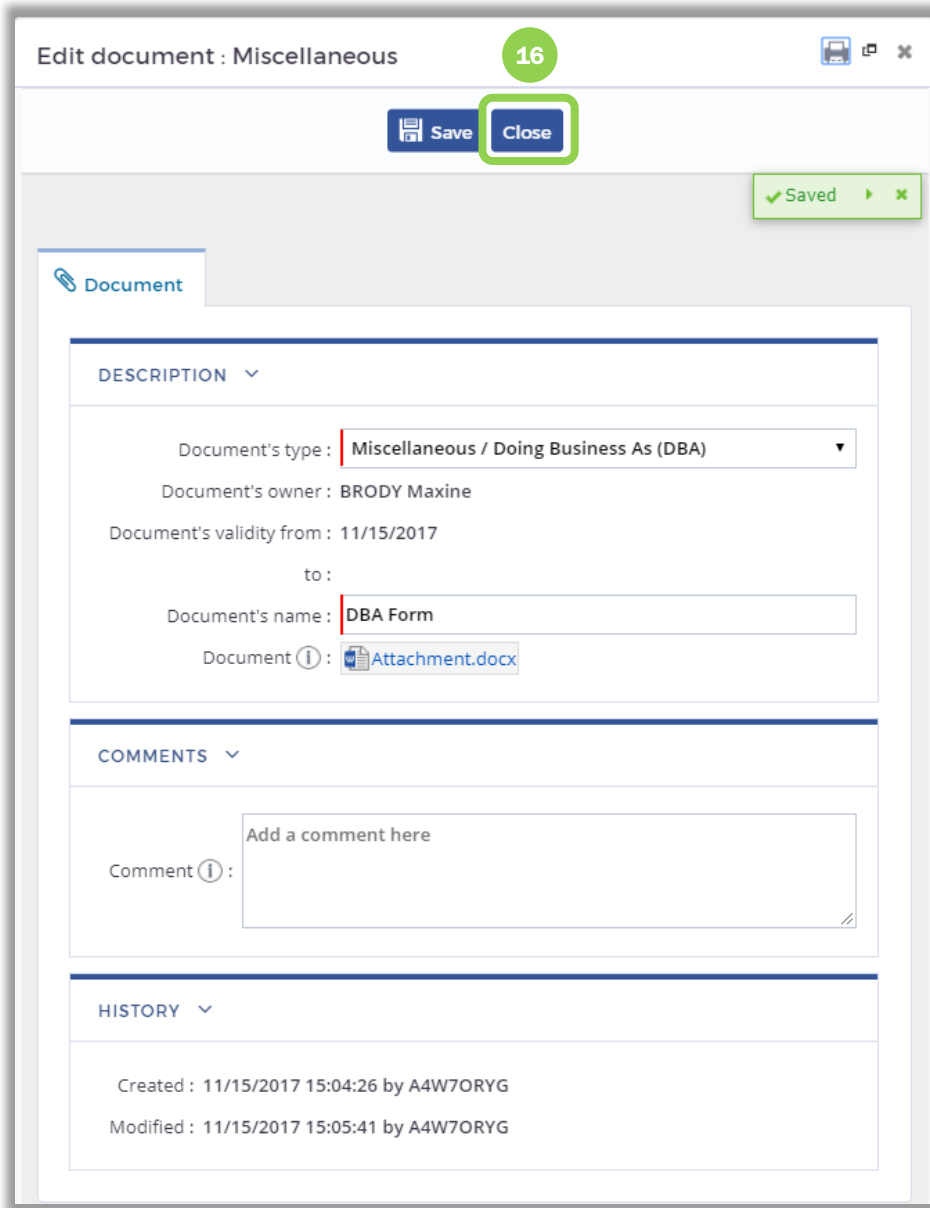
Comment ⓘ :

HISTORY ▾

Created : 11/15/2017 15:04:26 by A4W7ORYG

Modified :

15. Click the **“Submit”** button to submit the document.



16. The document has been successfully submitted. Click the "Close" button.

PASSPort Profile Tasks Contracts Performance Support

Vendor Vendor804 - Filed

Save and Refresh Create a change request



3 Result(s)

EQUAL EMPLOYMENT OPPORTUNITY DOCUMENT (EEO)

This is where you upload the Equal Employment Opportunity (EEO) documentation. Please visit the Small Business Services (SBS) website for guidance: <http://www.nyc.gov/html/sbs/html/procurement/dls.shtml>

To expedite the processing of your documentation, please upload documents as readable .PDF files whenever possible. Scanned paper documentation will result in potentially longer processing times.





Add EEO Document

Att.	Owner	Status	Title
 	Maxine Brody	In Review	DLS Report

1 Result(s)

MISCELLANEOUS DOCUMENTS

17 **Add Document(s)**

Att.	Owner	Status	Title
 	Maxine Brody	Accepted	DBA Form
 	Maxine Brody	Accepted	Certificate of Incorporation

2 Result(s)

The DBA document has been accepted.

17. To add an additional miscellaneous document, click the “Add Documents” button.

This user manual has provided you with step-by-step instructions on how to manage your account in PASSPort. If you have any questions on the Vendor Account Management process, please contact MOCS at help@mocs.nyc.gov.