

## Vendor Enrollment

*This document is a quick-start guide for vendor account administrators who want to submit an enrollment package in PASSPort. For more detailed step-by-step instructions on the Vendor Enrollment process, please refer to the Vendor Enrollment User Manual. If you have any questions or need assistance, please reach out to the Mayor's Office of Contract Services (MOCS) at [help@mocs.nyc.gov](mailto:help@mocs.nyc.gov).*

Vendors who are currently doing (or planning to do) business with the City of New York are encouraged to complete the Vendor Enrollment process. To complete the Vendor Enrollment process, you must first complete the Vendor Account Creation process (please refer to the associated user manual for details). Once your account is created, log in to PASSPort to prepare and submit your organization's enrollment package online by providing the following:

- 1. Business Information:** Provide information regarding your business revenue and contact information.
- 2. Contacts:** Identify and add all of your principals and/or officers to your organization's contacts list, as well as designate an account signatory.
- 3. Vendor and Principal Questionnaires:** Complete both vendor and principal questionnaires for your business and for any individuals who have a significant stake in the organization.
- 4. Parent and/Controlling Entities:** Identify any parent or other controlling entities.
- 5. Certificate of Incorporation (COI) Documentation:** Upload your organization's Certificate Of Incorporation or equivalent document.
- 6. e-Signature:** Submit an e-Signature for your account, which is a secure and accurate identification method for account signatories to sign documents with the City.

Once your organization's enrollment package has been submitted, MOCS will review the package and contact you with any questions or requests for additional information. After an enrollment package has been filed by MOCS, your organization will become fully enrolled in PASSPort and can continue to manage your account.

### Starting the Vendor Enrollment Process

1. Navigate and log in to PASSPort using your NYC.ID credentials: <http://www.nyc.gov/passport>
2. From the PASSPort homepage, the "**Profile**" button at the top of the page, then select "**Vendor Profile**"
3. Your vendor profile is displayed.
4. You will notice any alerts related to your account at the top of the page. Alerts starting with the  icon are warning alerts that will not stop you from proceeding with a process, while alerts starting with the  icon are blocking alerts that will prevent you from proceeding with a process until the specified action is completed.

Please refer to the steps on the following pages to assist you with preparing and submitting your vendor enrollment package.

## 1. Basic Information

On the **Basic Information** tab of your vendor profile, select and enter the following information:

1. Select your company's **"Annual gross revenue."**
2. Select your company's **"Business Category."**
3. Select the **"Date this business was formed."**
4. Enter the **"State in which business was formed."**
5. Enter the **"County in which business was formed."**
6. Select the **"Property Type"** and enter the property's address.
7. Click the **"Save and Refresh"** button.

## 2. Contacts

Prior to completing your vendor and principal questionnaires, you must add all of your organization's principals and/or officers to your account as well as designate an account signatory. Navigate to the **Contacts** tab and follow the steps below:

1. Click the **"Add a Contact"** button.
2. Enter the **"First Name"** of the contact.
3. Enter the **"Last Name"** of the contact.
4. Enter the **"Email"** of the contact.
5. Click the **"Save and Close"** button.
6. Select a **"Role"** for the contact that was added. Multiple roles can be selected for a contact.
7. Continue adding contacts until you have added all of your principals and/or officers as well as designated an account signatory who will submit an e-Signature for your package. Once you are done adding contacts, click the **"Save and Refresh"** button.



After a principal or officer has been added as a contact on the **Contacts** tab, they are able to create a NYC.ID using the email address that is associated with their contact on the **Contacts** tab. Principals or officers can create a NYC.ID by navigating to <http://www.nyc.gov/passport>, clicking the **"Login"** button, and clicking the **"Create Account"** link. Please refer to the *Vendor Account Creation User Manual* for detailed step-by-step instructions.

Once that principal or officer creates a NYC.ID, they will be able to log in to PASSPort and access both the vendor questionnaire and their principal questionnaire for the vendor account. If the principal or officer previously had a NYC.ID, they would be able to be immediately log in to PASSPort as soon as they were added as a contact for the account.

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## 3. Vendor and Principal Questionnaires

Now that you entered additional company information, added all of your principals and/or officers, and designated an account signatory, you are ready to start the vendor and principal questionnaires. Navigate to the **Disclosures** tab and follow the steps below:

1. Click the **“Edit”** button to open the first section of the **Vendor Questionnaire**.
2. Complete the eight sections of the **Vendor Questionnaire** by selecting answers to each question. Please note that if you select any form of Yes as an answer to a particular question, you will need provide additional details to answer the question and then click the **“Save”** button. Please note that in some scenarios you will need to add multiple rows of information to provide all of the necessary details.
3. After you have answered the questions for a particular section, click the **“Save and Next”** button. If you would like to exit the **Vendor Questionnaire** at any point, you can click the **“Save and Close”** button.
4. After you have answered the questions for all sections, click the **“Save and Close”** button.
5. If any attachments need to be added to your **Vendor Questionnaire**, click the **“Add an Attachment”** button on the **Disclosures** tab. Enter all the required information for the attachment and upload the necessary attachment. Click the **“Save”** button and then click the **“Close”** button.
6. Next you will need to identify all of your principals and/or officers. Click the  icon.
7. The vendor contacts that were added on the **Contacts** tab are displayed. Click the  icon to select a vendor contact and add it to the principal and/or officer grid.
8. Click the  icon to search for and select the principal and/or officer. Continue to add contacts until you have added all of your principals and/or officers.
9. Click the **“Save and Refresh”** button.
10. Click the **“Edit”** button to start the **Principal Questionnaire** for the associated principal or officer.
11. Complete the six sections of the **Principal Questionnaire** by selecting answers to each question. Please note that if you select any form of Yes as an answer to a particular question, you will need provide additional details to answer the question and then click the **“Save”** button.
12. After you have answered the questions for a particular section, click the **“Save and Next”** button.
13. After you have answered the questions for all sections of the **Principal Questionnaire**, click the **“Save and Close”** button.

## 4. Parent and/or Controlling Entities

As part of the Vendor Enrollment process, any related (parent and/or controlling entities) entities must also submit vendor enrollment questionnaires in order for your vendor enrollment package to be reviewed and filed.

Parent entities are defined as an individual, partnership, joint venture, or corporation that owns more than 50% of the voting stock of a vendor. Controlling entities are any entities that manage the day-to-day or hold 10% or more ownership of the business or has the right to direct daily operations. Related entities are identified on the **Disclosures** tab. Please follow the steps below to identify your related entities:

1. At the bottom of the **Disclosures** tab, answer the question: **“Do you have any parent or controlling entities?”** If you answer Yes you must then click the  icon to search for and select your parent and/or controlling entities. You are able to search for by EIN and/or FMS Vendor Code. If no search results appear, the entity must create a PASSPort account.
2. Click the **“Save and Refresh”** button.
3. The status of your identified related entities’ vendor questionnaires will be displayed in the grid. Please note that although you are able to submit your vendor enrollment package with pending related entities questionnaires, your package will be put on hold from being reviewed until all of the pending questionnaires are submitted.

## 5. e-Signature

Once you have completed your organization’s **Basic Information, Contacts, Vendor Questionnaire, Principal Questionnaire(s)**, and identified any related parent/controlling entities, you are ready to submit your vendor enrollment package. Please note, the person providing the e-Signature should be a principal or designee who is officially authorized to conduct business with the City on behalf of your organization. Please follow the steps below to provide your e-Signature:

1. Click the **“Check Progress”** button and then click the **“OK”** button to confirm that you want to submit your vendor enrollment package.
2. Navigate to the Signature tab and click the **“Add Signature”** button.
3. Click the **“Proceed to Signature”** button to create a new e-Signature.
4. Click the **“I certify all of above”** checkbox.
5. Enter your **“NYC.ID Password.”**
6. Click the **“Sign”** button to add your e-Signature. Close the window to return to your package.
7. Click the **“Submit Package”** button to submit your package to MOCS.



Once your organization’s enrollment package as been submitted, MOCS will review the package and contact you with any questions or requests for additional information. When MOCS files your enrollment package, your vendor account becomes fully enrolled. You will receive email notifications whenever MOCS takes action on your enrollment package.