Vendor Account Management

Roles Involved:
- Vendors

Summary:
Step-by-step instructions on how to manage your vendor account in PASSPort.

Last Updated: March 10, 2020
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## Accessing PASSPort

To access PASSPort and log in using your NYC.ID credentials, go to [http://www.nyc.gov/passport](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.
The Basic Information tab of your vendor is displayed.

2. To start the Change Request process, click the “Create a change request” button.
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.
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.
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.
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 ✗ icon to close the questionnaire.
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.
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.
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.
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. Commodity Enrollment

Enrolling in commodities in PASSPort is one way a vendor can increase their awareness of contracting opportunities with the City of New York. A commodity identifies a good or service that a vendor can provide. When enrolling in a commodity, it should reflect the vendor’s current capacity to deliver the relevant good and/or service. Commodity enrollment can be updated at any time as a vendor expands or otherwise changes the goods and/or services they offer.

Follow the steps below to identify and enroll in commodities in PASSPort. Once beginning enrollment in a commodity, vendors must click “Submit” to save the enrollment information. Please note that this process used to be completed in the Payee Information Portal (PIP). Vendors no longer enroll in commodities in PIP.

The City classifies commodities into categories provided through Level 1 (L1) and Level 3 (L3) categories (unique to New York City as of January 2020), and Level 5 (L5) categories (NIGP). To help vendors navigate these commodity categories, we offer a NYC Commodity Classification Directory (click here to view) that provides keywords in L1, L3, and L5.

NYC Commodity Classification Hierarchy

If a vendor is enrolling in commodities for the first time, please proceed to Step 1 below.

If a vendor is already enrolled in commodities, we recommend first reviewing your current enrollment(s) in the PASSPort Vendor Profile under the Commodity/Certification tab. Then, proceed to Step 1 to add commodities or Step 11 to deselect or modify selected commodities.

There are tool tips available throughout the commodity enrollment process that provide quick and helpful information relevant to specific enrollment fields. Tool tips can be accessed by hovering over the Information icon.

If you have any questions on commodity enrollment, please contact the MOCS Service Desk.
1. From the PASSPort homepage, click the “Commodity Enrollment” icon in the Quick Links window.

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.

**NOTE:** If you are already enrolled in commodities, please click here (Step 11) for guidance on how to remove existing commodities.
3. Click the icon to begin navigating through L1, L3, and L5 categories. Upon clicking, all six L1 categories will appear.
4. Vendors now have two ways to identify commodities for selection.

**Option 1:** Navigate the NYC Commodity Classification Hierarchy.

4.1. Click the icon from the L1 category that best applies to the good/service.
4.1.b. Upon clicking the icon to expand the L1 categories, a list of L2 categories is displayed.

Click the icon for the L2 category that best applies to the good/service.
4.1.c. Upon clicking the icon to expand the L2 categories, a list of L3 categories is displayed. Select the L3 category that best applies to the good/service (Vendor will then move to Step 5 below.)

**NOTE:** You may only select one L3 category at a time. If more than one L3 category is selected, the user will receive an alert and will not be able to proceed.
Option 2: Conduct a keyword search on L3 categories.

4.2.a. Type an L3 category keyword into the "Keywords" search field.

Important: The keyword search is limited to L3 categories only. Entering L5 category keywords or numerical values will not generate any search results. Please use the NYC Commodity Classification Directory (click here to view) to identify the L3 category keyword that applies to the good/service.
The NYC Commodity Classification Directory (click here to view) is a resource for vendors to become familiar with the structure and descriptions of the NYC Commodity Classification Hierarchy. It includes commodity descriptions for L1, L2, L3, and L5 categories.
4.2.b. Once you have identified the applicable L3 category keyword using the NYC Commodity Classification Directory, copy and paste, or type, the L3 category keyword into the “Keywords” search field and click the “Search” button.

Keyword search example: In this example, the vendor searches “Facilities Equipment.”

4.2.c. Click the relevant L3 category. Upon selecting the L3 category, a list of all associated L5 categories will appear on the screen. (Vendor will then move to Step 5 below.)
Upon selecting an L3 category, a list of all associated L5 categories is displayed.

5. Click the button to expand and see the full list of L5 categories.
All L5 categories associated with the L3 category are automatically selected.

6. To remove an L5 category that does not pertain to your business, click the icon to the left of the code. The L5 categories that remain on the list will be the categories you enroll in.
NOTE: When enrolling in an L3 category, documentation that supports the ability to provide the corresponding good/service is required.

Examples of acceptable documentation include, but are not limited to, an invoice, license, contract, statement of work, capability statement, or certification. One document is sufficient to cover all goods/services within the L3 category.

7. Click the “Drag and Drop to Add a File” button to upload documentation. The maximum file size is 50MB.
8. After you add the document, click the "Save" button.
9. Click the “Submit” button.

**NOTE:** You must click “Submit” to save your work.

You have successfully enrolled. The documentation you submitted will be reviewed by the City.
10. After clicking "Submit" click the "Close" button to return to the commodity enrollment screen.

For information on how to modify your commodity enrollment, continue to Step 11.
11. To remove an existing L3 category, click the icon to the left of the commodity and click the “Remove” button at the top of the window. Add your reason for unenrolling and click the “OK” button followed by the “Close” button.

NOTE: In order to modify (remove or add) the L5 categories within an existing L3 category, you must remove the entire L3 category and re-enroll with the desired L5 categories.
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.
The **Basic Information** tab of your vendor profile is displayed.

2. Scroll down on the page to see the M/WBE Certifications window.
3. To declare a new M/WBE certification, click the “Declare New Certification” button.
4. Click the icon to search for and select a “Self-Declared Certification.”
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.
6. Click the “Save and Close” button.
You have successfully self-declared an M/WBE certification.

7. 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.
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.

2. To edit an existing contact, click the icon.
3. 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.
4. Click the “Add a Contact” button to add a new contact.
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.
3. Navigate to the **Documentation** tab of your vendor profile.
The Documentation tab of your vendor profile is displayed. On this page you can enroll in commodities and submit EEO, COI, and DBA documentation.

4. To add EEO documentation, click the “Add EEO Document” button.
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.
9. Click the “Submit” button to submit your EEO documentation for review.

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

10. To add a DBA document, click the “Add Documents” button in the Miscellaneous Document section.
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.
15. Click the “Submit” button to submit the document.
The document has been successfully submitted. Click the "Close" 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 the MOCS Service Desk.

The DBA document has been accepted.

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