

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: 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>

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.

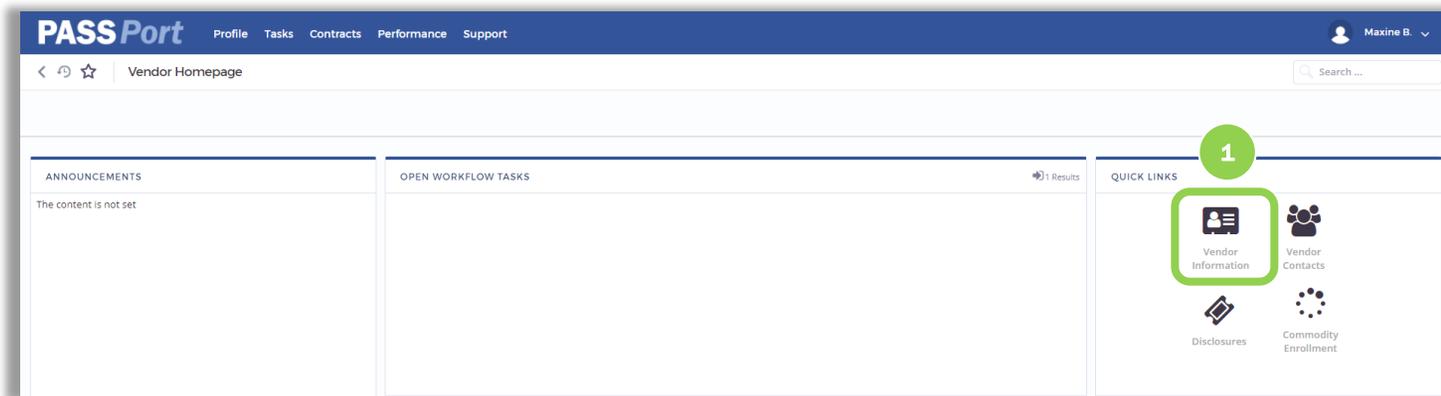
After the Vendor Enrollment process is completed, your organization's enrollment information is valid for three years from when it is signed and submitted in PASSPort; however, you are required to confirm your information is accurate and up-to-date with each new contract award. If any of your organization's 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 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.

2. 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:
 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)

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
2 Disclosures
 3 Signature

ALERTS
 Sign in the Signature tab

BASIC COMPANY INFO

PASSPort Vendor Status: Draft [CR]

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: Nonprofit Corporation

DUNS number:

FMS Vendor Code:

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)

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 9 10

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)

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

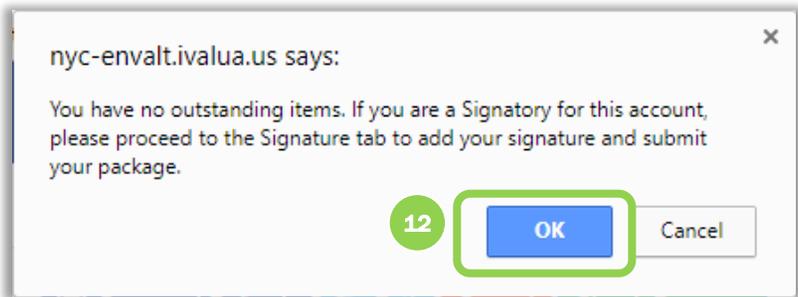
Vendor Questionnaire Sections

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 ▾

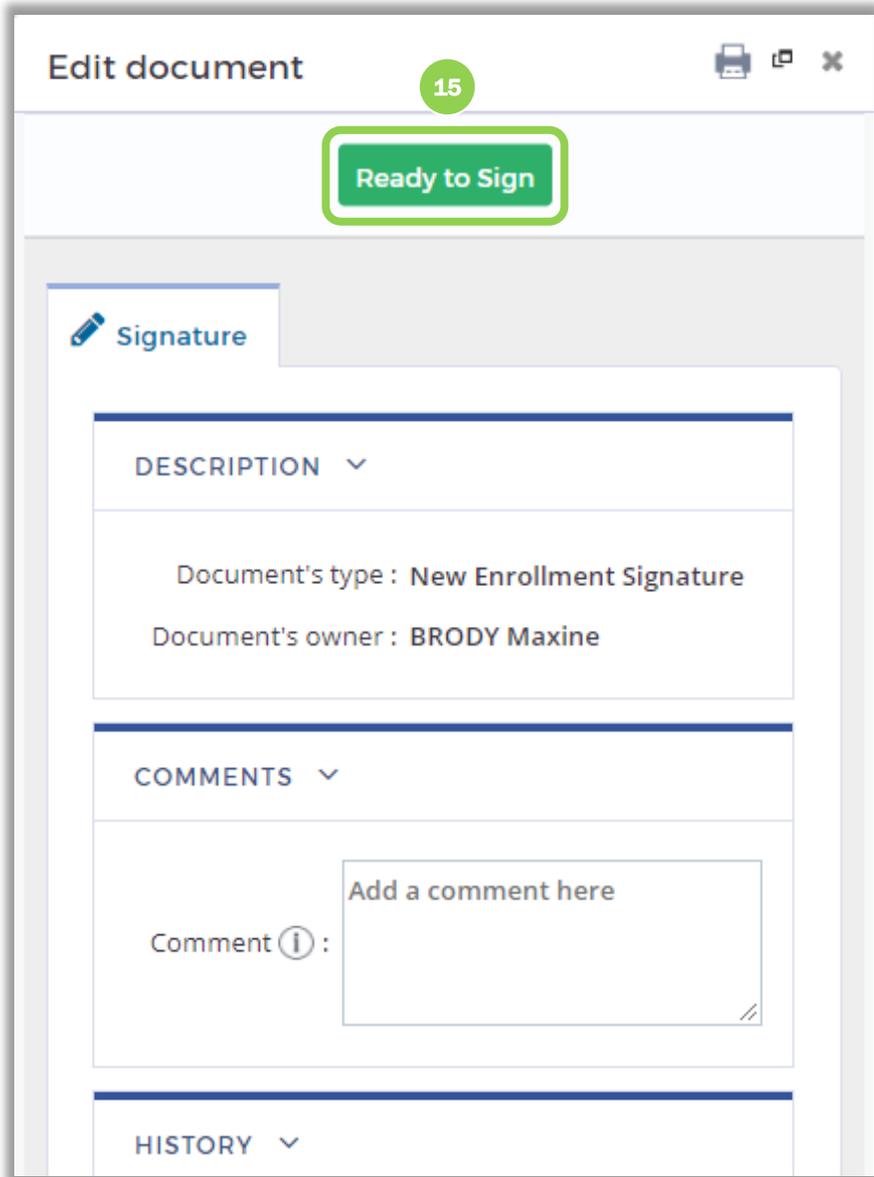
0 Result(s)

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)

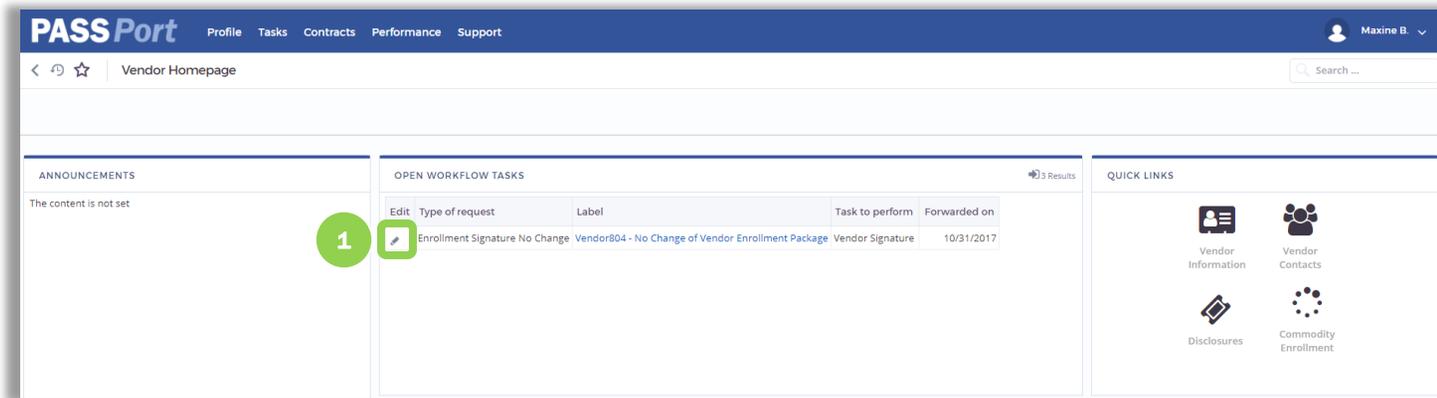
20. Click the **“Submit Change Request”** button to submit the change request for review.

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.

PASSPort Profile Tasks Contracts Performance Support Maxine B. ▾

Edit document: Vendor Signature Search ...

Change Request Needed Sign

Signature

DESCRIPTION ▾

Document's type: No Change of Vendor Enrollment Package
Document's owner: ACCO STAFF 01 ACCO STAFF 01

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 Submitting Vendor to criminal charges.

By submitting these Questionnaires, I certify that:

- I have been given legal authority by the Submitting Vendor and all Principal Owners and Officers (as defined in Vendor Enrollment: A Beginner's Guide to PASSPort) that are the subject of these Principal Questionnaires to submit these Questionnaires to the City;
- The substance of these Questionnaires have not been altered in any manner;

I certify all of above: 2

NYC.ID Email (NYC.PassportTraining@mailinator.com)

NYC.ID Password: 3

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.

By approving this Certification of No Change you are certifying that your Vendor Enrollment Package in up to date and accurate. :

Cancel Confirm 5

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.*

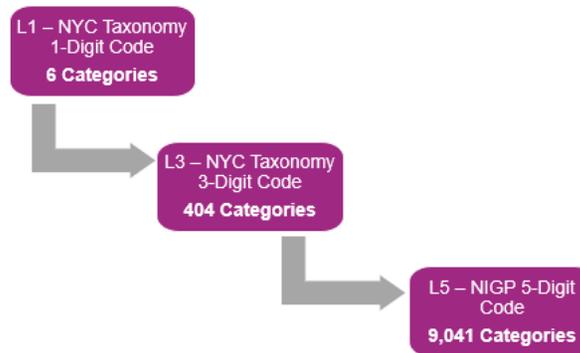
4. Commodity Enrollment

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

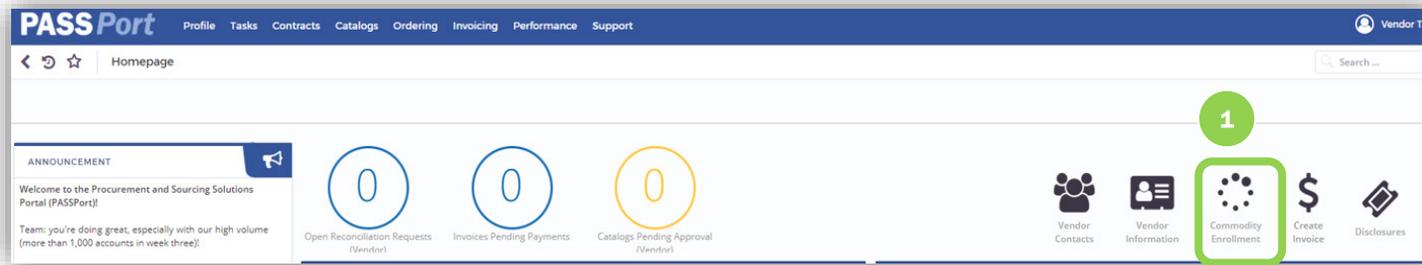


If a vendor is enrolling in commodities for the first time, please proceed to **Step 1** below.

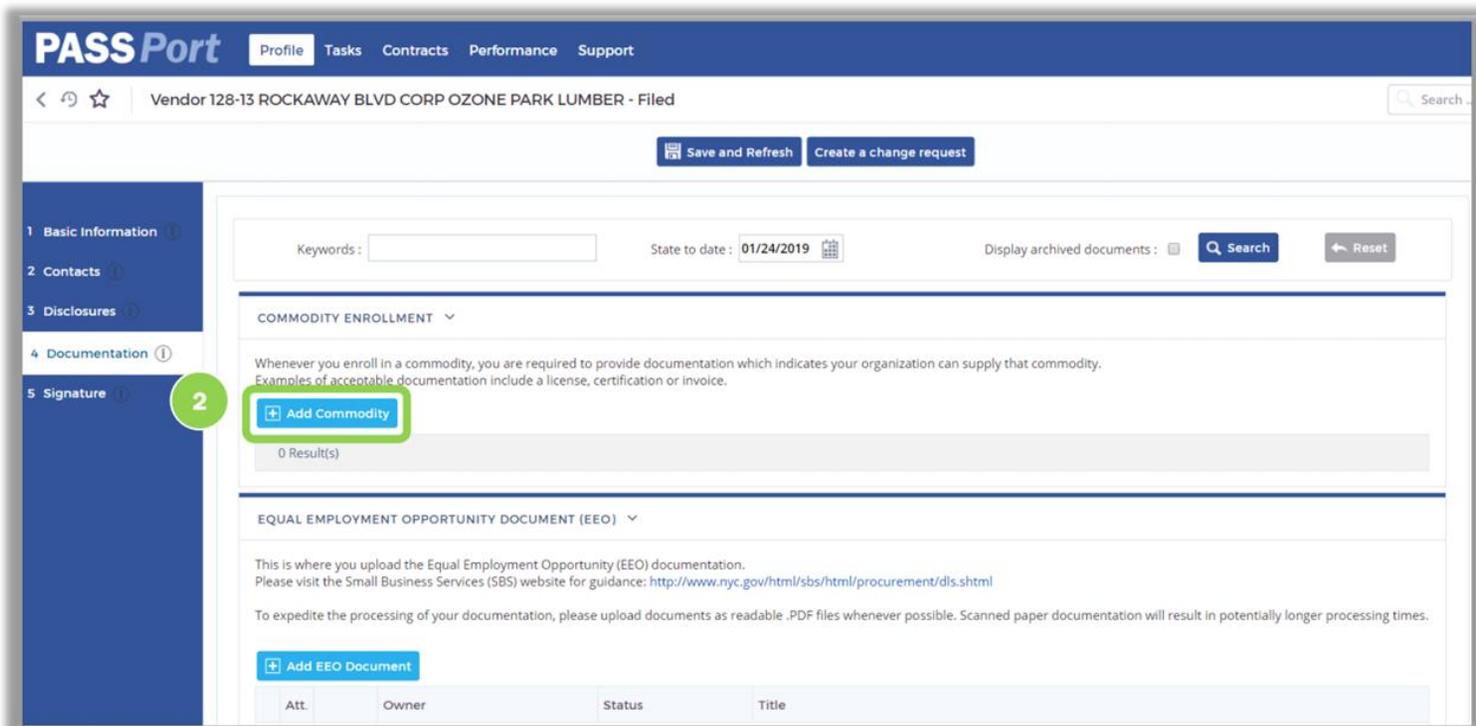
If a vendor is already enrolled in commodities, we recommend first reviewing your current enrollment(s) in the PASSPort Vendor Profile under the Commodity/Certification tab. Then, proceed to **Step 1** to add commodities or **Step 11** to deselect or modify selected commodities.

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 MOCS at help@mocs.nyc.gov.



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.

Edit document : Commodity Enrollment 🖨️ 📄

Save | **Close**

Document

ALERTS ▾

DESCRIPTION ▾

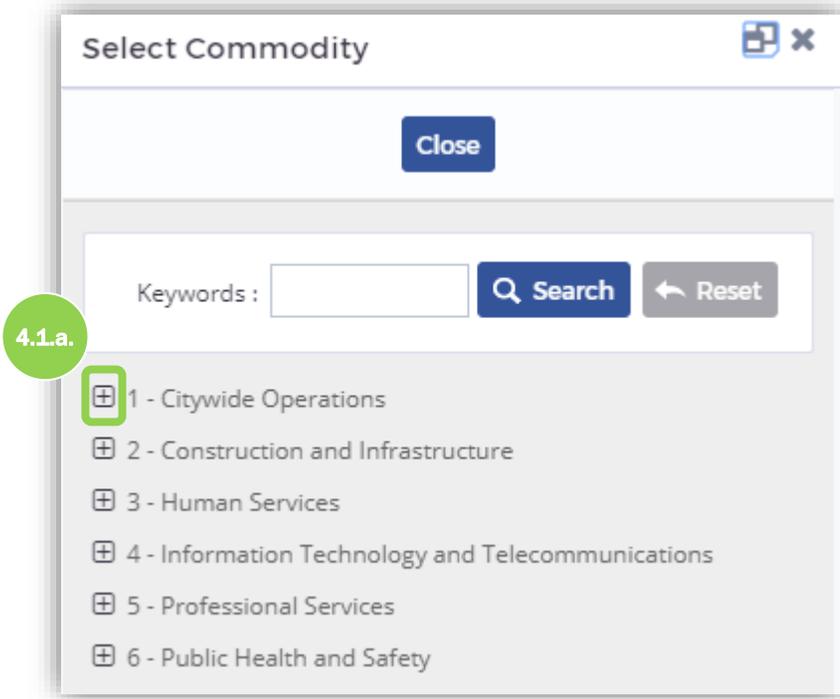
Document's type : Justification

Document's owner : Sample Vendor

Commodity ⓘ : ...

Document ⓘ :

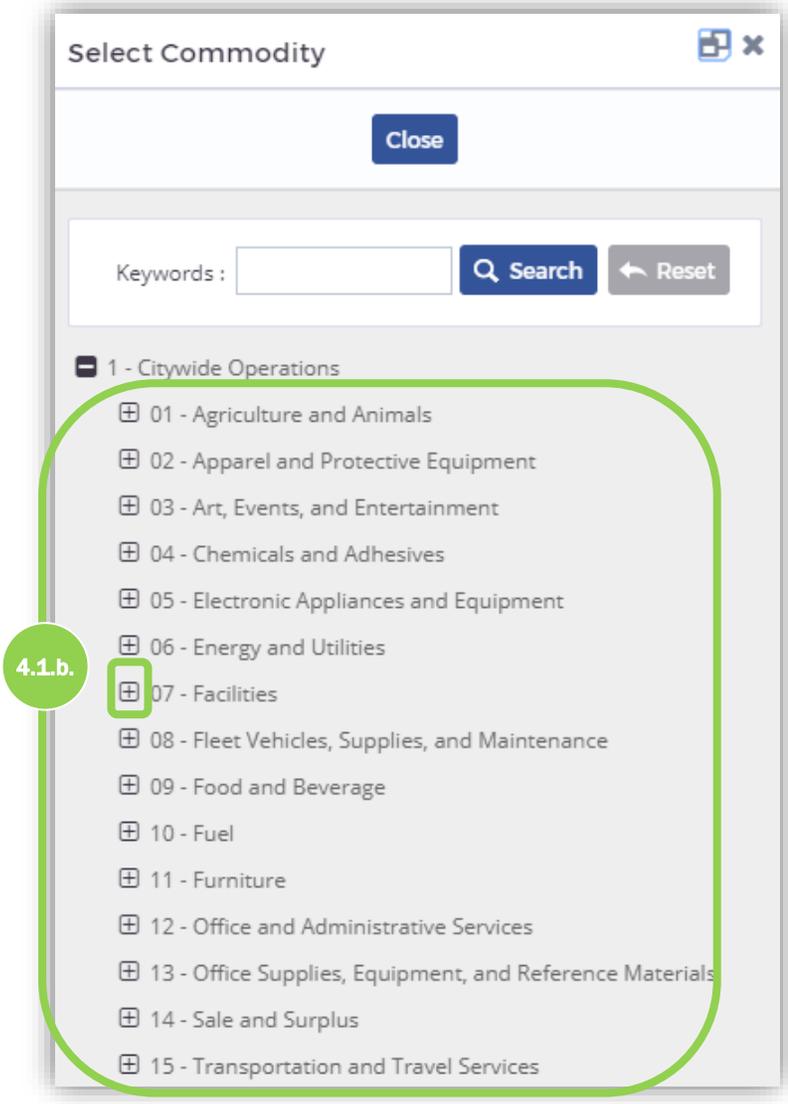
3. Click the ... icon to begin navigating through L1, L3, and L5 categories. Upon clicking, all six L1 categories will appear.



4. Vendors now have two ways to identify commodities for selection.

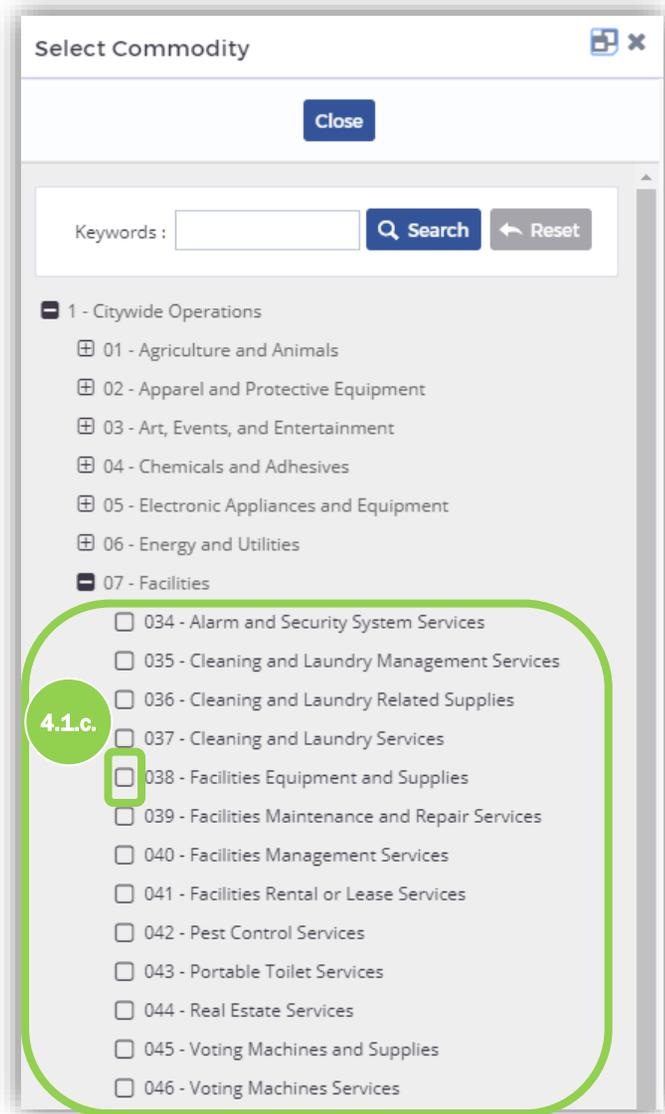
Option 1: Navigate the NYC Commodity Classification Hierarchy.

4.1.a. 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.

Select Commodity

Close

4.2.a.

Keywords: Search Reset

- 1 - Citywide Operations
- 2 - Construction and Infrastructure
- 3 - Human Services
- 4 - Information Technology and Telecommunications
- 5 - Professional Services
- 6 - Public Health and Safety

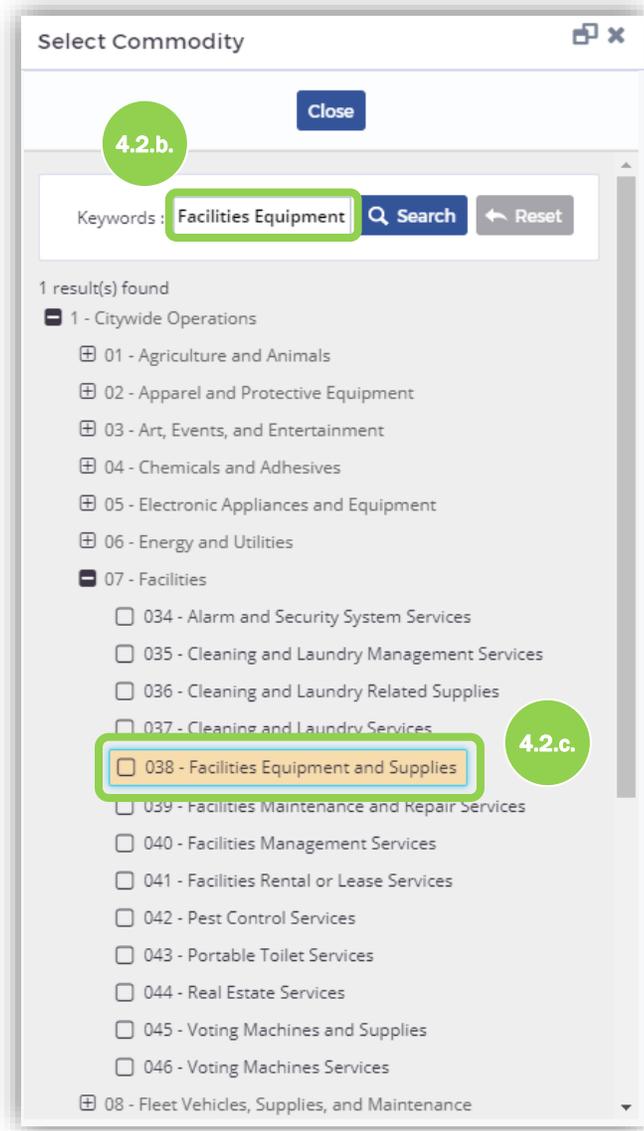
Option 2: Conduct a keyword search on L3 categories.

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.

1	
2	NYC Commodity Classification Directory
3	Citywide Operations
4	Includes goods and services that support and maintain core city operations, Office and Administrative Goods and Services, Agriculture and Animal related Goods and Services, Apparel and Protective Equipment, Arts and Entertainment, Chemicals and Adhesives, Electronic Appliances, Energy and Utilities, Facilities, Food and Beverage, Fleet, Fuel, Furniture, Office Supplies and Equipment, Sale and Surplus Items, Transportation and Travel
5	01 - Agriculture and Animals
6	001 - Agricultural Equipment and Supplies
7	01900 - AGRICULTURAL CROPS AND GRAINS INCLUDING FRUITS, MELONS, NUTS
8	01921 - Berry Crops
9	01932 - Cotton
10	01942 - Fruits, Deciduous Tree
11	01960 - Potatoes, Irish
12	02000 - AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIES (SEE CLASS 022 FOR PARTS)
13	02010 - Counters, Acre
14	02014 - Curb Edger, Heavy Duty, Tractor Mounted
15	02018 - Dozer Blades (For Farm Tractors)
16	02023 - Ensilage Cutters
17	02025 - Farm Wagons
18	02028 - Feed Wagons
19	02030 - Fertilizer Applicators and Fittings, Liquid and Gas
20	02035 - Grain Bins and Tanks
21	02039 - Grass Spriggers and Seeders
22	02041 - Harvesting Equipment: Bean, Corn, and Pea Pickers and Shells
23	02059 - Land Levelers
24	02062 - Log Splitters
25	02069 - Pasture Renovators
26	02073 - Planting Equipment, Row Crop
27	02074 - Processing Machinery and Equipment, Agricultural
28	02078 - Recycled Agricultural Equipment Accessories and Supplies
<p> Coversheet Expanded to L2 Category Expanded to L3 Category Expanded to L5 Category NYC Commodity Directory + </p>	

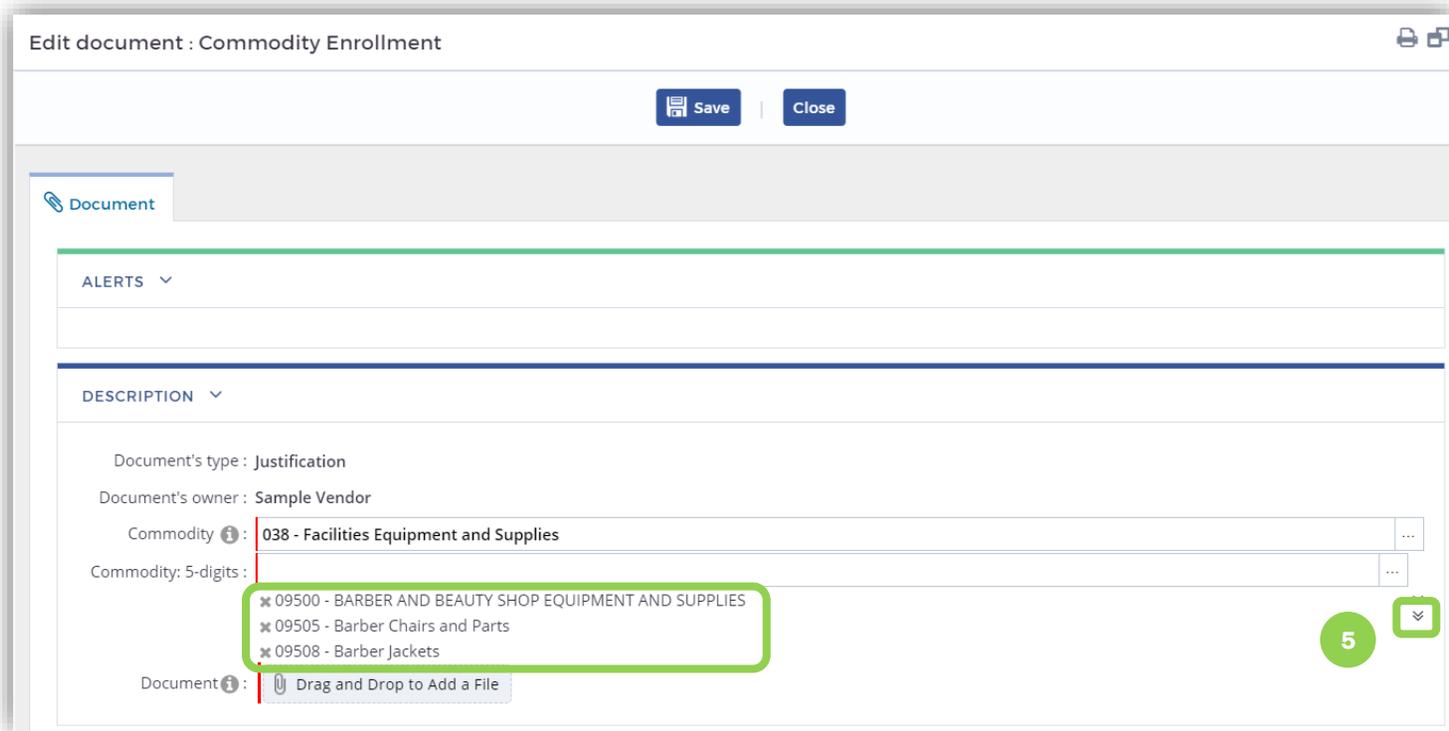
The NYC Commodity Classification Directory ([click here to view](#)) is a resource for vendors to become familiar with the structure and descriptions of the NYC Commodity Classification Hierarchy. It includes commodity descriptions for L1, L2, L3, and L5 categories.



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.

Edit document : Commodity Enrollment

Save | Close

Document

ALERTS

DESCRIPTION

Document's type : Justification

Document's owner : Sample Vendor

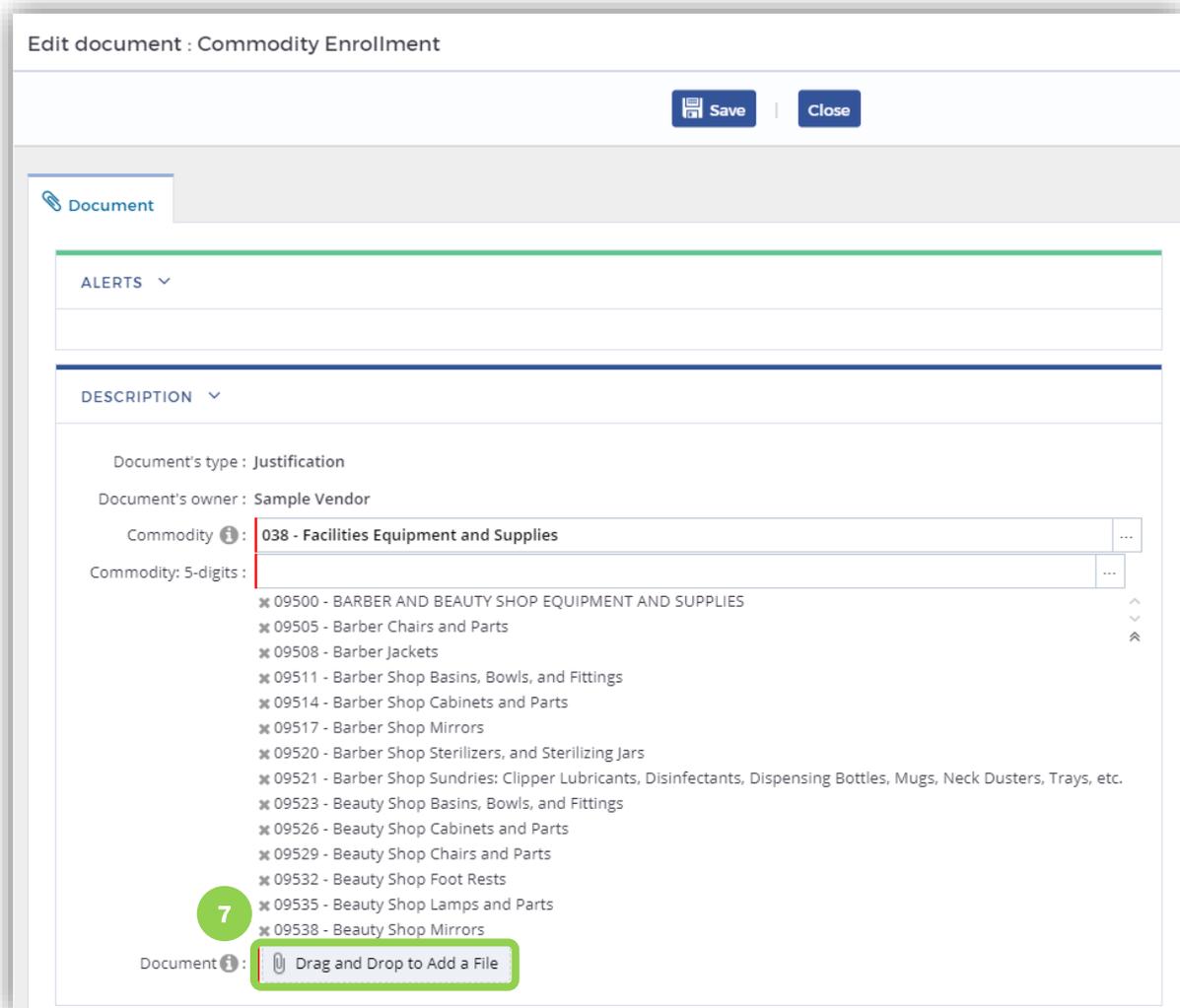
Commodity ⓘ : 038 - Facilities Equipment and Supplies

Commodity: 5-digits :

- ✕ 09500 - BARBER AND BEAUTY SHOP EQUIPMENT AND SUPPLIES
- ✕ 09505 - Barber Chairs and Parts
- ✕ 09508 - Barber Jackets
- ✕ 09511 - Barber Shop Basins, Bowls, and Fittings
- ✕ 09514 - Barber Shop Cabinets and Parts
- 6 ✕ 09517 - Barber Shop Mirrors
- ✕ 09520 - Barber Shop Sterilizers, and Sterilizing Jars
- ✕ 09521 - Barber Shop Sundries: Clipper Lubricants, Disinfectants, Dispensing Bottles, Mugs, Neck Dusters, Trays, etc.
- ✕ 09523 - Beauty Shop Basins, Bowls, and Fittings
- ✕ 09526 - Beauty Shop Cabinets and Parts
- ✕ 09529 - Beauty Shop Chairs and Parts
- ✕ 09532 - Beauty Shop Foot Rests
- ✕ 09535 - Beauty Shop Lamps and Parts
- ✕ 09538 - Beauty Shop Mirrors

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.



Document

ALERTS ▾

DESCRIPTION ▾

Document's type : Justification

Document's owner : Sample Vendor

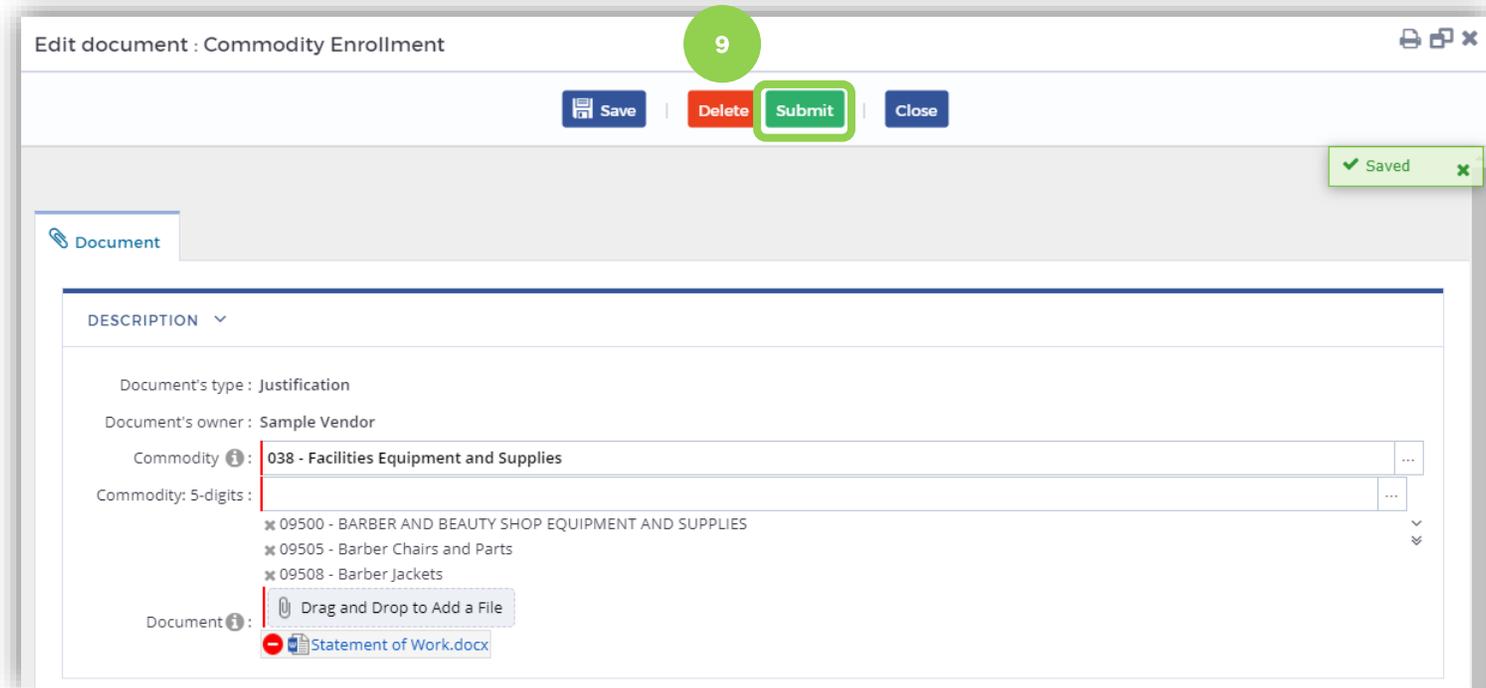
Commodity ⓘ : 038 - Facilities Equipment and Supplies ...

Commodity: 5-digits : ...

- ✕ 09500 - BARBER AND BEAUTY SHOP EQUIPMENT AND SUPPLIES
- ✕ 09505 - Barber Chairs and Parts
- ✕ 09508 - Barber Jackets
- ✕ 09511 - Barber Shop Basins, Bowls, and Fittings
- ✕ 09514 - Barber Shop Cabinets and Parts
- ✕ 09517 - Barber Shop Mirrors
- ✕ 09520 - Barber Shop Sterilizers, and Sterilizing Jars
- ✕ 09521 - Barber Shop Sundries: Clipper Lubricants, Disinfectants, Dispensing Bottles, Mugs, Neck Dusters, Trays, etc.
- ✕ 09523 - Beauty Shop Basins, Bowls, and Fittings
- ✕ 09526 - Beauty Shop Cabinets and Parts
- ✕ 09529 - Beauty Shop Chairs and Parts
- ✕ 09532 - Beauty Shop Foot Rests
- ✕ 09535 - Beauty Shop Lamps and Parts
- ✕ 09538 - Beauty Shop Mirrors

Document ⓘ : Drag and Drop to Add a File

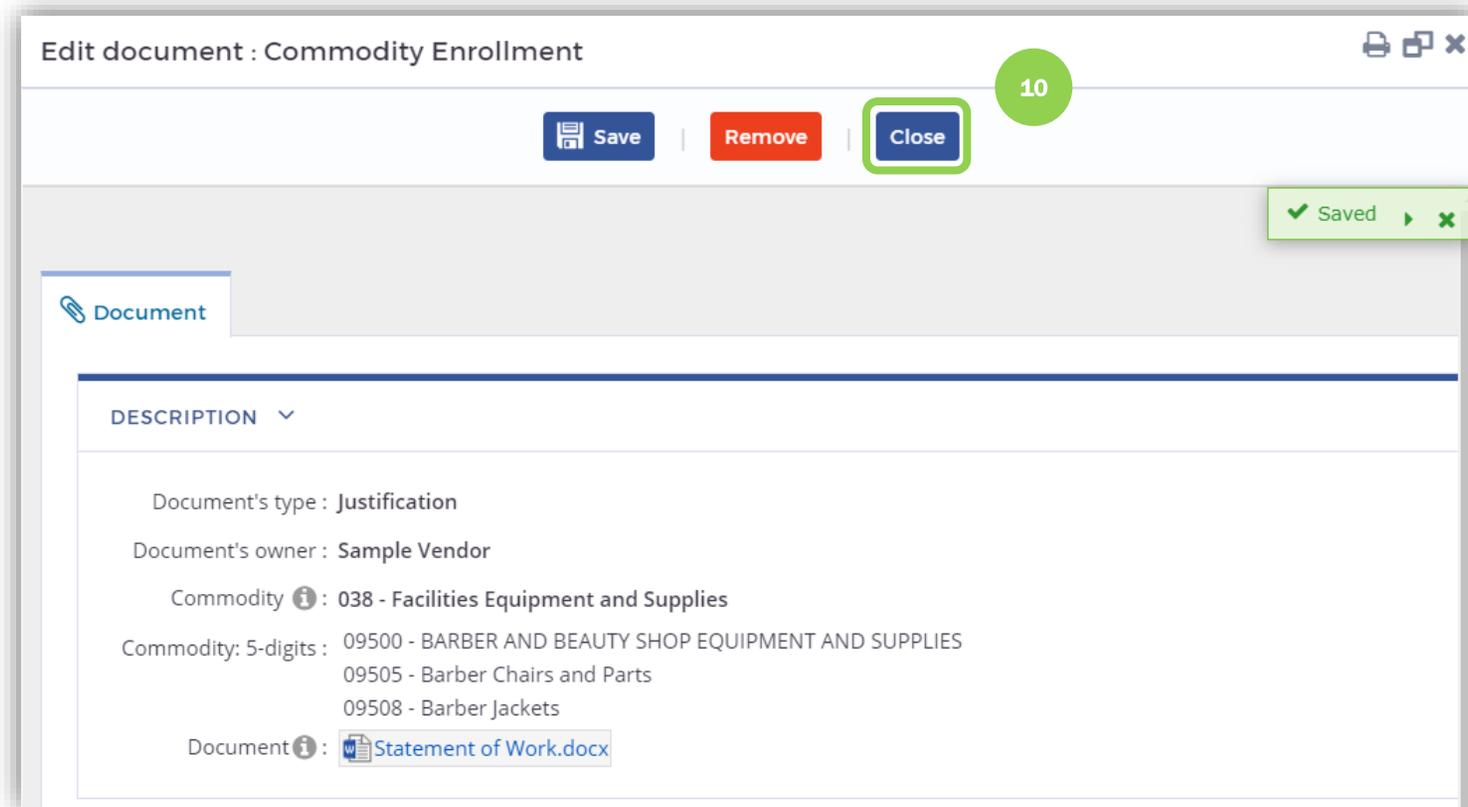
8. After you add the document, click the **“Save”** button.



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.

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.

[+ Add Commodity](#)

Att.	Owner	Commodity
  	Sample Vendor	038 - Facilities Equipment and Supplies

1 Result(s)

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.

Edit document : Commodity Enrollment  

[Save](#) [Remove](#) [Close](#)

[Document](#)

DESCRIPTION ▾

Document's type : Justification

Document's owner : Sample Vendor

Commodity ⓘ : 038 - Facilities Equipment and Supplies

Commodity: 5-digits : 09500 - BARBER AND BEAUTY SHOP EQUIPMENT AND SUPPLIES
09505 - Barber Chairs and Parts
09508 - Barber Jackets

Document ⓘ : [Statement of Work.docx](#)

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.

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.

PASS Port 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)					

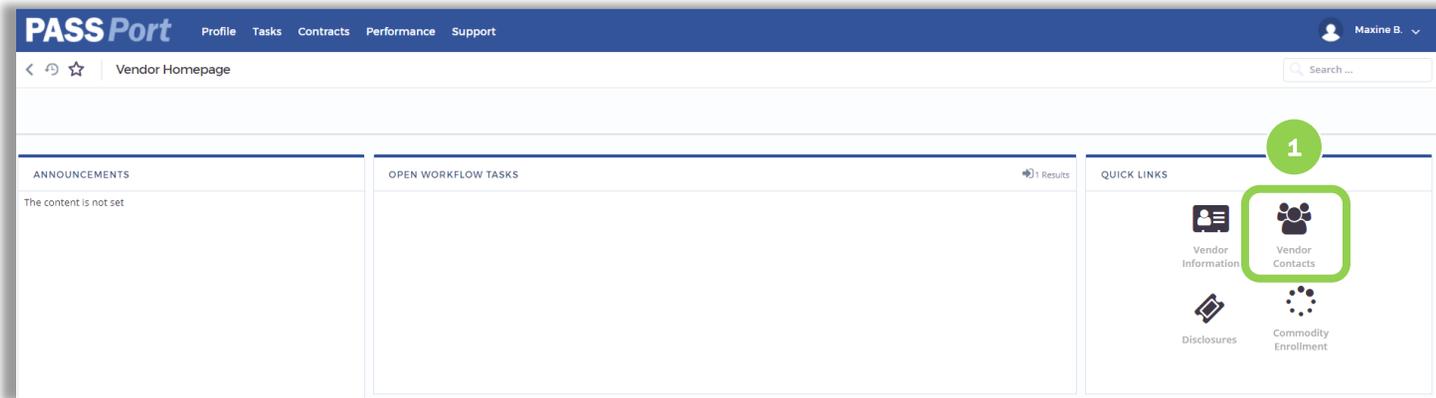
You have successfully self-declared an M/WBE certification.

- 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 Search ...

Save and Refresh 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

CEO (OR EQUIVALENT) INFORMATION ① ▾
 First Name ① : Nina Last Name ① : Mach
 Email ① : nina@mailinator.com Phone Number ① : 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

①	Name	Email	Role ①
2	Brody Maxine	passporttraining@mailinator.com	<input type="text"/> x Signatory x Vendor admin
x	Contact Second	second@mailinator.com	<input type="text"/> x Contributor
x	Herman Nina	first@mailinator.com	<input type="text"/> x 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

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.

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 :

Address Line 2 :

City :

Country : UNITED STATES ▾

State/Province : ...

Zip Code :

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.

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 1

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

CEO (OR EQUIVALENT) INFORMATION 1

First Name 1 : Nina Last Name 1 : Mach
Email 1 : nina@mailinator.com Phone Number 1 : 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

1	Name	Email	Role 1
1	Brody Maxine	passporttraining@mailinator.com	Signatory Vendor admin
x	Contact New	new@mailinator.com	Signatory Vendor admin Contributor
x	Contact Second	second@mailinator.com	Signatory
x	Herman Nina	first@mailinator.com	Signatory

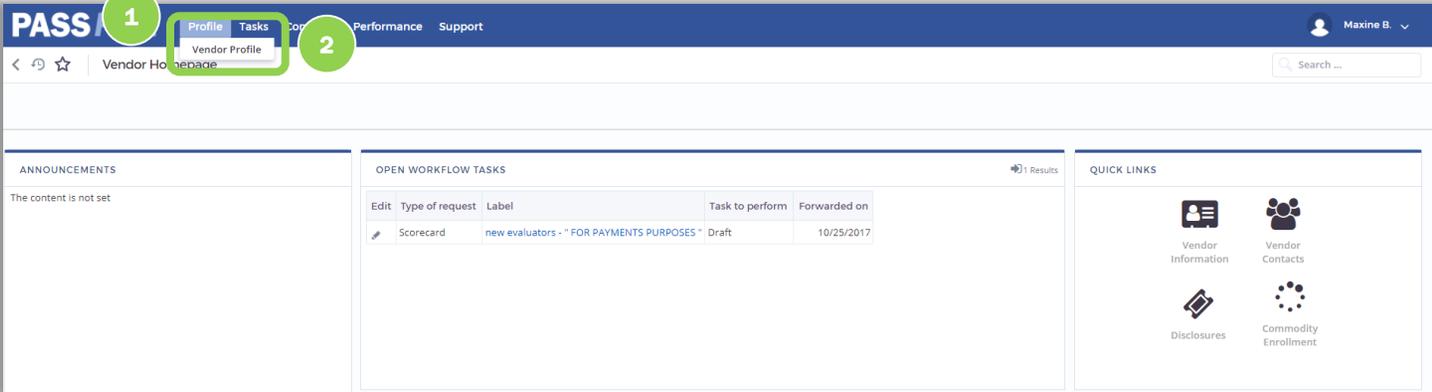
7. Select a “**Role**” for the contact that was added. Multiple roles can be selected for a contact.

- *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.



The screenshot shows the PASSPort interface. The top navigation bar includes 'PASS', 'Profile', 'Tasks', 'Performance', and 'Support'. A user profile 'Maxine B.' is visible in the top right. The main content area is divided into three sections: 'ANNOUNCEMENTS', 'OPEN WORKFLOW TASKS', and 'QUICK LINKS'. The 'OPEN WORKFLOW TASKS' section contains a table with the following data:

Edit	Type of request	Label	Task to perform	Forwarded on
	Scorecard	new evaluators - "FOR PAYMENTS PURPOSES"	Draft	10/25/2017

The 'QUICK LINKS' section includes icons for 'Vendor Information', 'Vendor Contacts', 'Disclosures', and 'Commodity Enrollment'. The 'Profile' button in the top navigation bar is highlighted with a green circle and the number '1'. A dropdown menu is open from the 'Profile' button, and the 'Vendor Profile' option is highlighted with a green circle and the number '2'.

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 : 55555559
 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 ▾

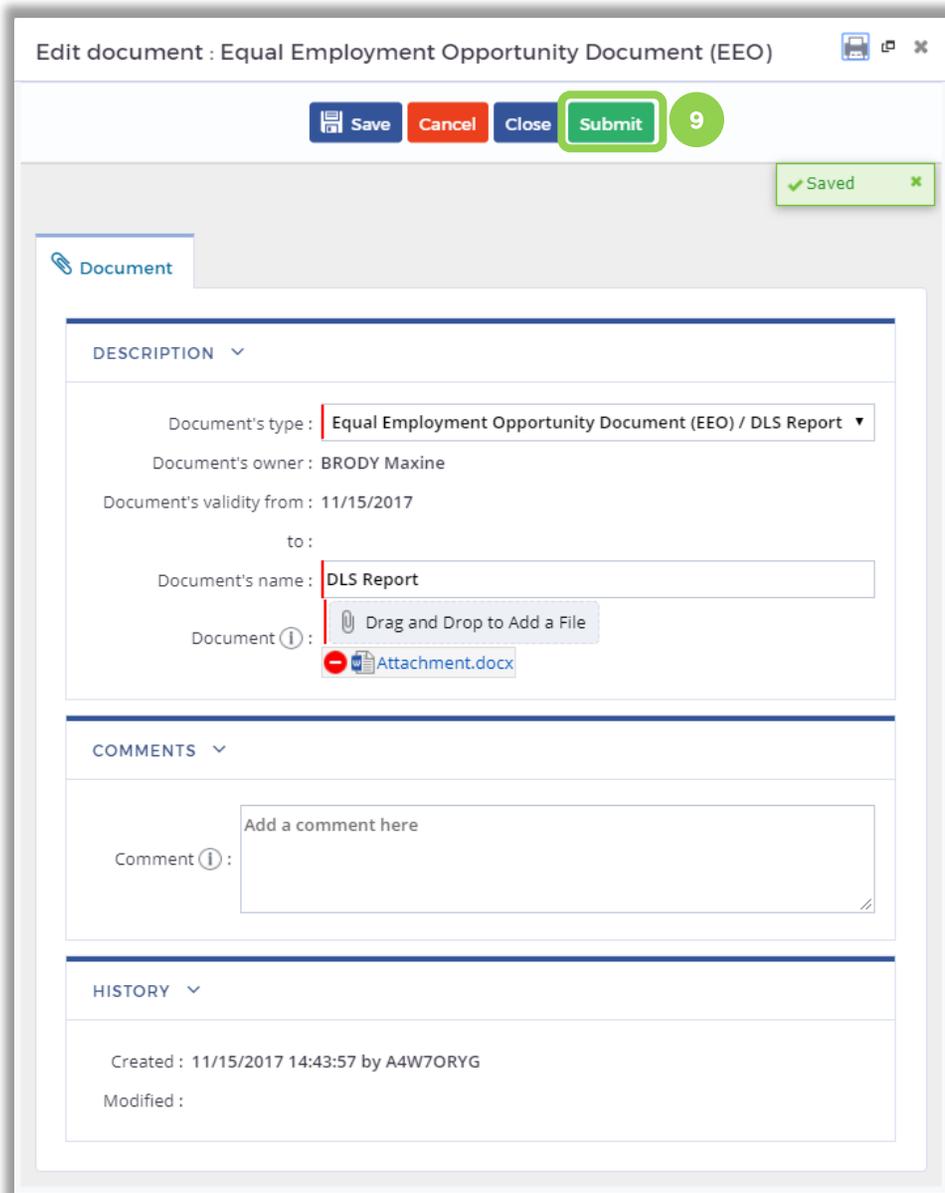
Comment ⓘ :

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.



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)

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.

10

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 ▾

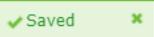
Created :

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 ▾

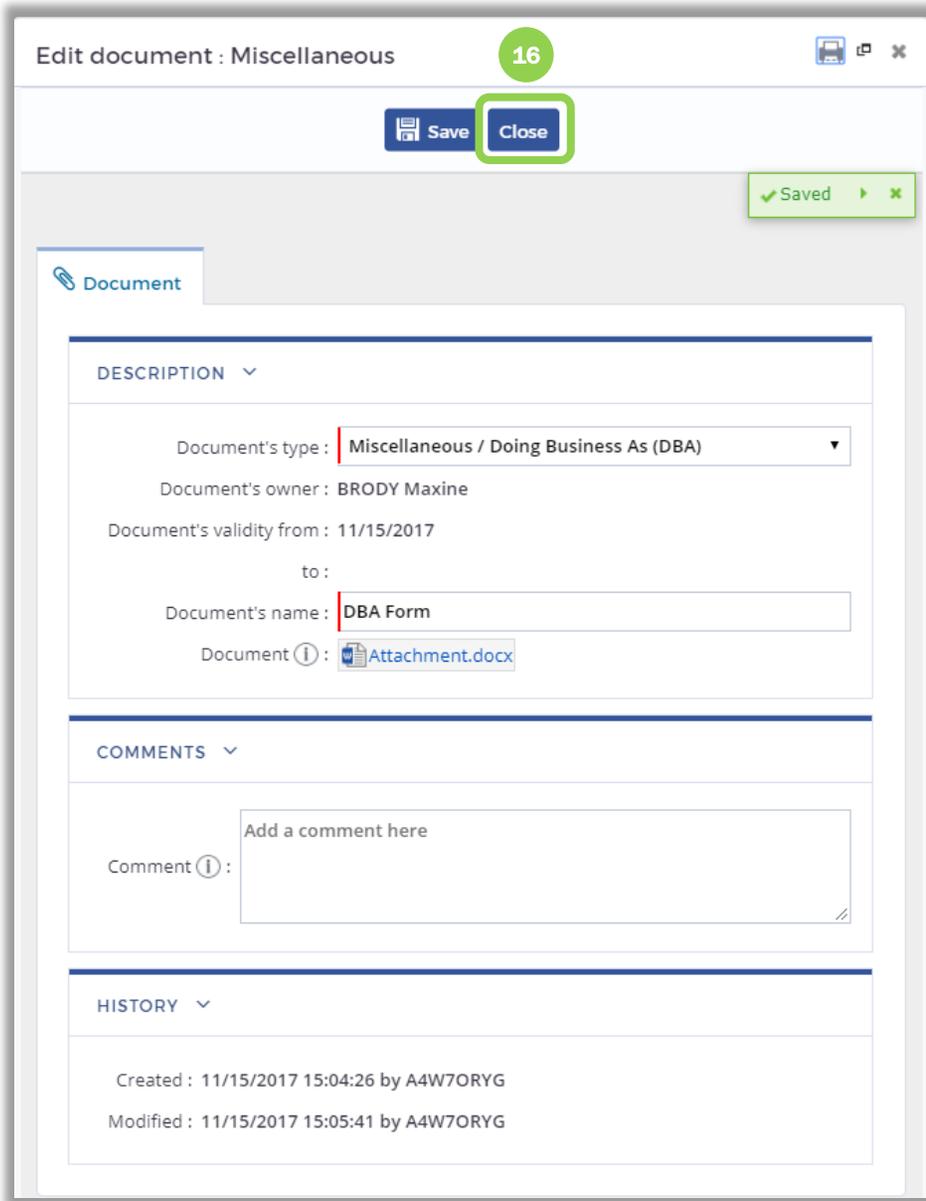
Comment ⓘ :

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.