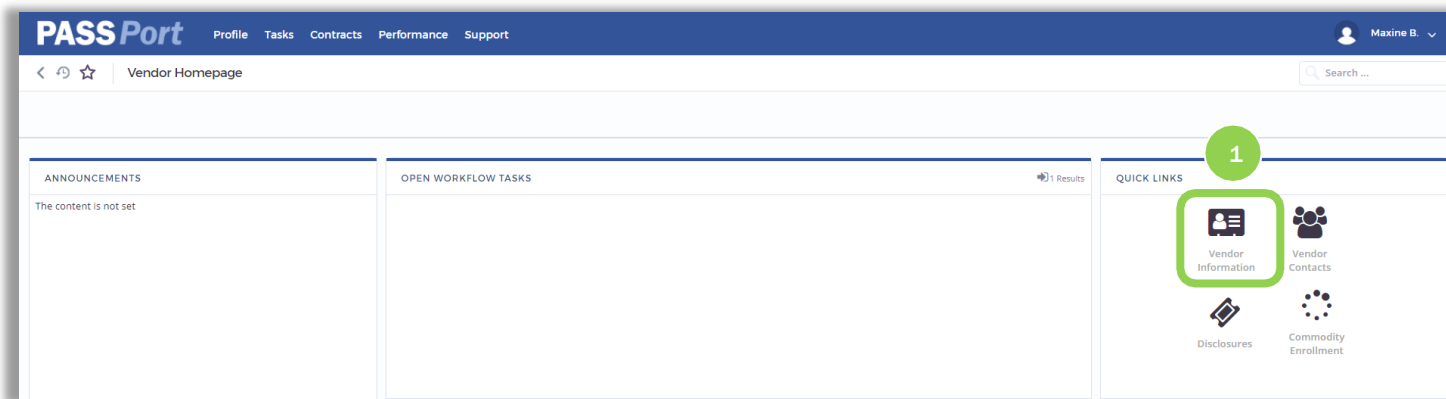


Creating and Submitting a Change Request

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) v

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

BASIC COMPANY INFO v

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 v

Address Line 1 : 123 Street
Address Line 2 :
City : Brooklyn

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

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]

EIN: 555555559

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

Date this business was formed: 03/08/1999

Country in which business was formed: UNITED STATES

Website:

State in which business was formed: New York

Twitter:

County in which business was formed: New York

Facebook:

National or regional stock exchange or NASDAQ listing:

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 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?

ⓘ

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?

ⓘ 8

+ Add Row

	Type	Violation	Misdemeanor Conviction	Summary of Finding	Date of Action	Charging Agency
x	Vendor ▾		☐			

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

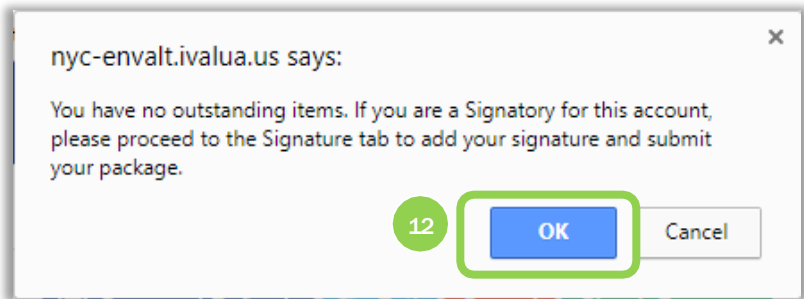
Vendor Questionnaire Sections

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 ▾

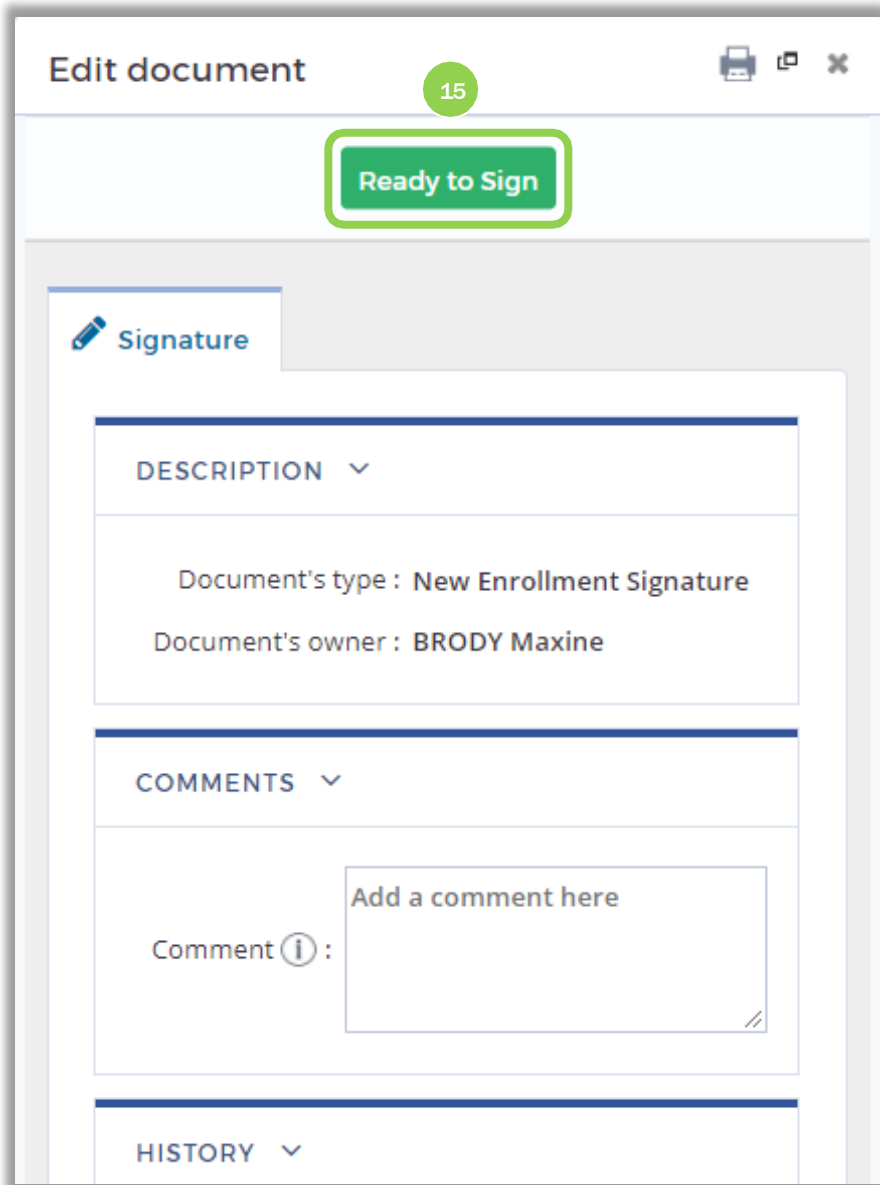
0 Result(s)

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

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.