

Complete the PASSPort Vendor Enrollment

Learn how to get Filed and make your profile visible to agencies in PASSPort.

Before We Begin

The steps in this guide can be completed by a user provisioned with the role:

- **Vendor Admin**
- **Signatory** (users with role can sign the Vendor Enrollment Package)
- **Contributor** (users with this role can enter information, but cannot sign or submit the Vendor Enrollment Package)

Note: The user who created the PASSPort account is automatically listed as the Vendor Admin of the account. If you or someone from your organization has not yet created a PASSPort account, see [Create a PASSPort Account](#).

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Documentation Tab

Click the Check Progress Button

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Submit the Vendor Enrollment Package

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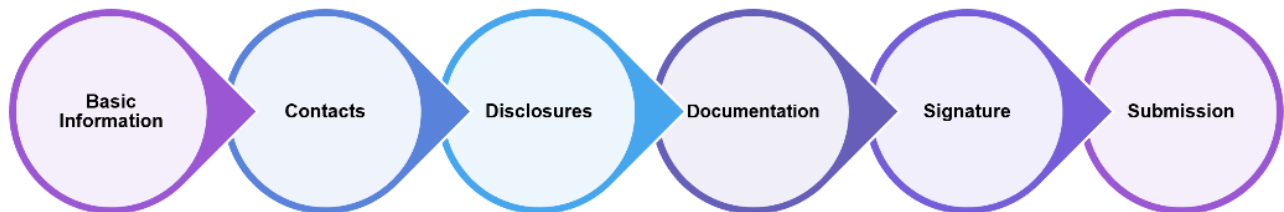
Introduction

All contracting activities with the City of New York (“the City”) take place in one centralized procurement system: **PASSPort**, the City’s digital **P**rocurement and **S**ourcing **S**olutions **P**ortal. This guide provides you with step-by-step instructions for completing and submitting a Vendor Enrollment Package in PASSPort.

Why Complete the Vendor Enrollment Process?

Vendors who are planning to do business with the City should complete the Vendor Enrollment process. The Vendor Enrollment process in PASSPort allows vendors to introduce themselves to the City and provide background information. It also allows agencies to view your profile and information about your organization.

The Vendor Enrollment Process



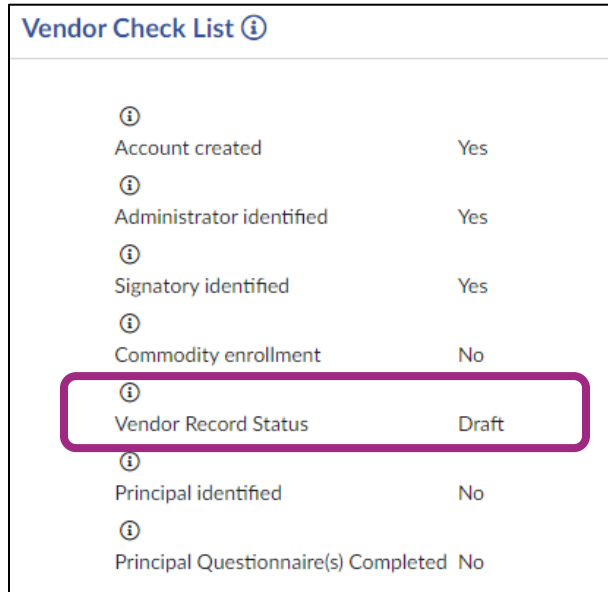
What is the Vendor Enrollment Package?

The Vendor Enrollment Package is a series of business questions and disclosures that are completed and submitted in PASSPort. Upon successful Vendor Enrollment, the vendor status will update to Filed status and an email is sent to the vendor confirming Filed status.

PASSPort Vendor Status

There are two ways for vendors to view and track their progress towards completing Vendor Enrollment. To check your PASSPort Vendor Status, go to the PASSPort **Homepage**. In the **Vendor Check List** section, review the text to the right of the **Vendor Record Status**.

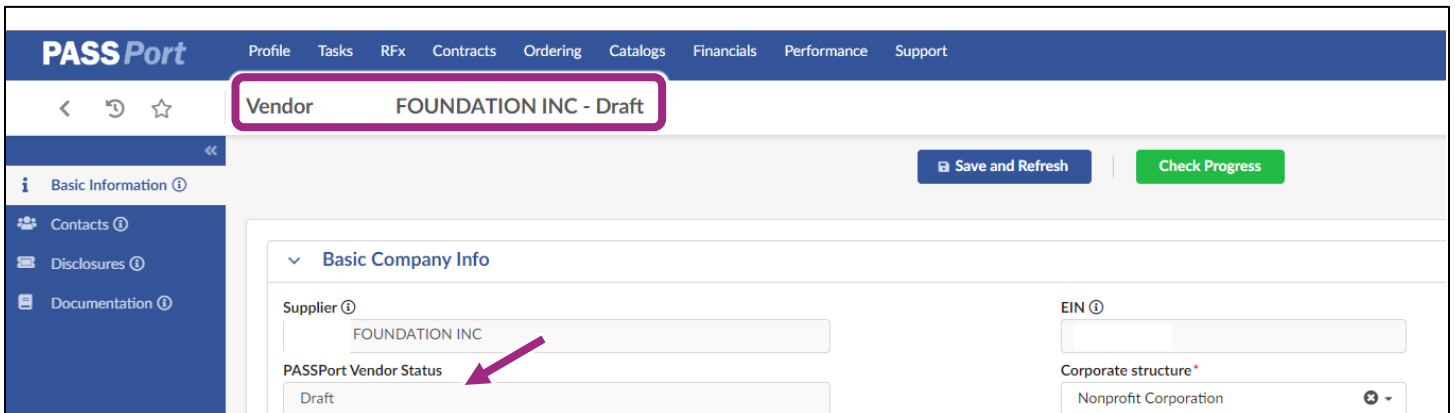
In the example below, you'll notice that the PASSPort Vendor Status says **Draft**. This means that the Vendor Enrollment Package has not yet been completed.



Vendor Check List ⓘ	
Account created	Yes
Administrator identified	Yes
Signatory identified	Yes
Commodity enrollment	No
Vendor Record Status	Draft
Principal identified	No
Principal Questionnaire(s) Completed	No

When the PASSPort Vendor Status says **Filed**, it means that the Vendor Enrollment Package has been completed, signed, and submitted. You have successfully disclosed your organization's information to the City and are ready to do business!

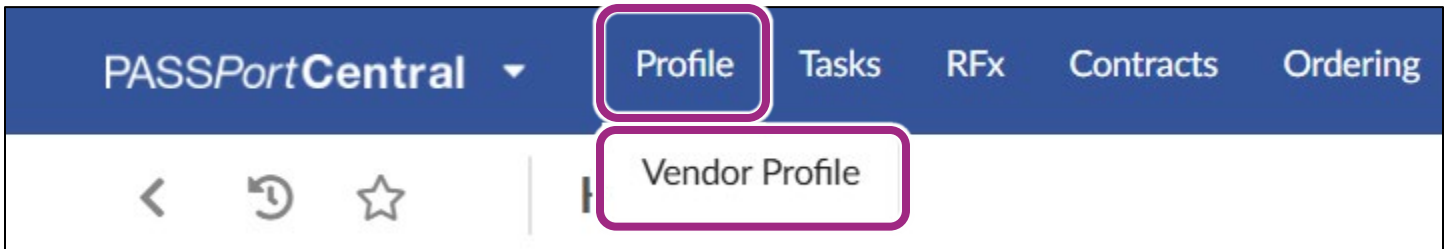
Another way to view your Vendor Enrollment progress is to view the PASSPort Vendor Status in the **Basic Information** tab of the Vendor Profile. It is also displayed below the top navigation menu when visiting any tab within the Vendor Profile. The example below shows the vendor's name and a PASSPort Vendor Status of Draft.



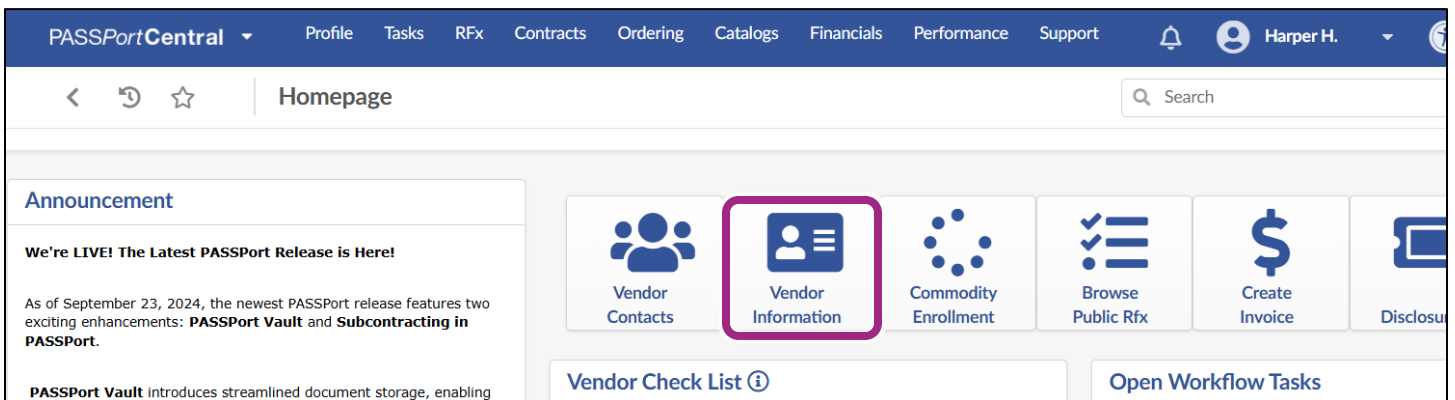
The screenshot shows the PASSPort interface with a navigation bar at the top containing 'Profile', 'Tasks', 'RFx', 'Contracts', 'Ordering', 'Catalogs', 'Financials', 'Performance', and 'Support'. Below the navigation bar, the breadcrumb 'Vendor' and the vendor name 'FOUNDATION INC - Draft' are highlighted with a purple box. On the left, a sidebar menu includes 'Basic Information', 'Contacts', 'Disclosures', and 'Documentation'. The main content area shows the 'Basic Company Info' section with fields for 'Supplier' (FOUNDATION INC), 'PASSPort Vendor Status' (Draft), 'EIN', and 'Corporate structure' (Nonprofit Corporation). A purple arrow points to the 'PASSPort Vendor Status' field.

Access the Vendor Enrollment Package

The Vendor Enrollment Package is located in the Vendor Profile. To start your Vendor Enrollment Package, [log in to PASSPort](#). You will land on the Vendor Homepage. Click **Profile** in the top navigation menu, then click **Vendor Profile**. By default, the **Basic Information** tab will display.



The Vendor Enrollment Package can also be accessed by clicking the **Vendor Information** icon located on the Vendor Homepage.



PASSPort Alerts and Required Fields

As you complete your information in PASSPort, you will come across visual prompts that will tell you what you must do:



The screenshot shows the PASSPort Vendor Enrollment interface for 'Vendor Harper's Hamper - Draft'. The interface includes a sidebar with navigation options: Basic Information, Contacts, Disclosures, and Documentation. The main content area features an 'Alert' section with a list of five items, each marked with a red circle icon containing an exclamation mark. Below the alerts is the 'Basic Company Info' section, which includes input fields for company name, EIN, and corporate structure.

Alerts:

- State whether you have a Parent or Controlling Entity in the Disclosures tab
- Assign Signatory in Contacts tab
- Complete each section of the Disclosures tab
- Upload your Certificate of Incorporation (or equivalent) in the Documentation tab
- In Disclosures tab, identify all principal owners and the 3 officers with the most substantial degree of control. Don't have 3? Affirm below.
- Please upload your Equal Employment Opportunity (EEO) documentation in the Documentation Tab

Basic Company Info:

Company Name: Harper's Hamper
EIN: [Redacted]
PASSPort Vendor Status: Draft
Corporate structure*: Limited Liability Company

- The red icons  are blocking alerts. You must address each to complete Vendor Enrollment.
- The brown icons  are non-blocking alerts. These will not stop you from completing Vendor Enrollment. However, if there are upcoming contracting actions, your Contracting Agency may reach out to request EEO documentation submission.
- A red asterisk * indicates required fields that must be completed.

Note: The red asterisk will not disappear once you have provided the required information.

Basic Information Tab

In the Basic Information tab, vendors provide information about their organization. To access this tab, click **Profile** in the top-level navigation menu, then click **Vendor Profile**. By default, the **Basic Information** tab displays.

1. Complete the **Basic Company Info** section.

Note: These fields are required:

- **Annual gross revenue**
- **Business category**
- **Date this business was formed**
- **Country in which business was formed**
- **State in which business was formed** (appears after Country is selected)
- **County in which business was formed**, and
- **Corporate Structure**

The screenshot shows a web application interface for a vendor profile. The page title is "Vendor Harper's Hamper - Draft". The left sidebar contains navigation options: "Basic Information" (highlighted with a red box and a red arrow pointing to the "Basic Company Info" section header), "Contacts", "Disclosures", and "Documentation". The main content area is titled "Basic Company Info" and contains several form fields. A red circle with the number "1" is placed over the "Basic Company Info" header. The form fields are organized into two columns. The left column includes: "Supplier" (text input with "Harper's Hamper"), "PASSPort Vendor Status" (text input with "Draft"), "Doing Business As" (text input), "Annual gross revenue" (dropdown menu), "Business category" (dropdown menu), "Date this business was formed" (calendar icon), "Country in which business was formed" (dropdown menu), "County in which business was formed" (text input), and "National or regional stock exchange or NASDAQ listing" (text input). The right column includes: "EIN" (text input with "123578906"), "Corporate structure" (dropdown menu with "Limited Liability Company"), "DUNS" (text input), "FMS Vendor Code" (text input), "Web Site" (text input), "Twitter" (text input), "Facebook" (text input), and "Other social media" (text input). A "Save and Refresh" button is located at the top right of the form area. A search bar is visible in the top right corner of the page.

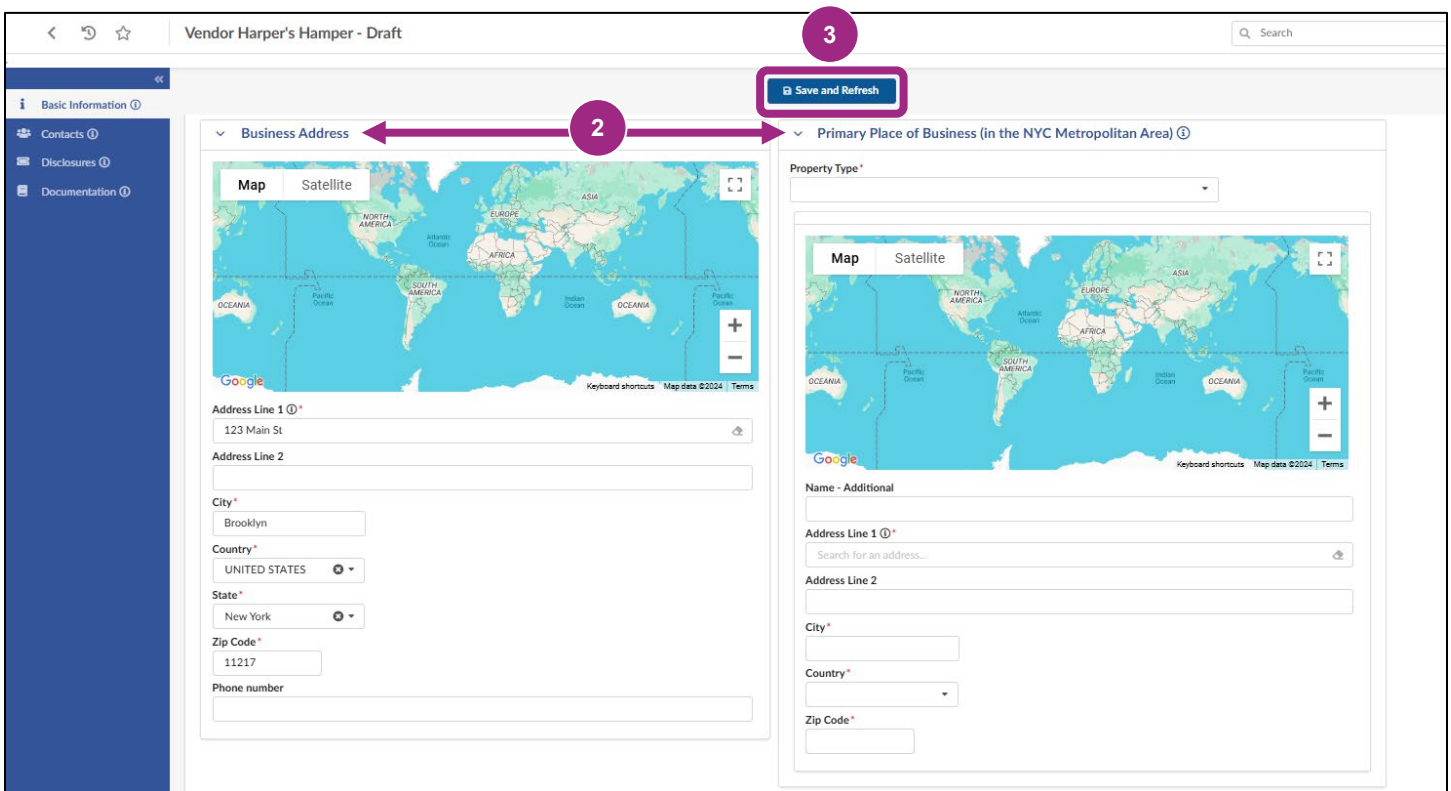
2. Scroll down and complete all fields in the following sections:

- **Business Address**
- **Primary Place of Business (in the NYC Metropolitan Area)**

Note: The Business Address and Primary Place of Business can be the same address. If you do not have a Primary Place of Business in the NYC Metropolitan Area, please enter in your executive office address.

Note: When you put in the Business Address and Primary Place of Business **Address Line1**, the system will locate the address on the map and autofill the **Zip Code** information. Google Maps has been incorporated into the application with Map and Satellite image views for your review.

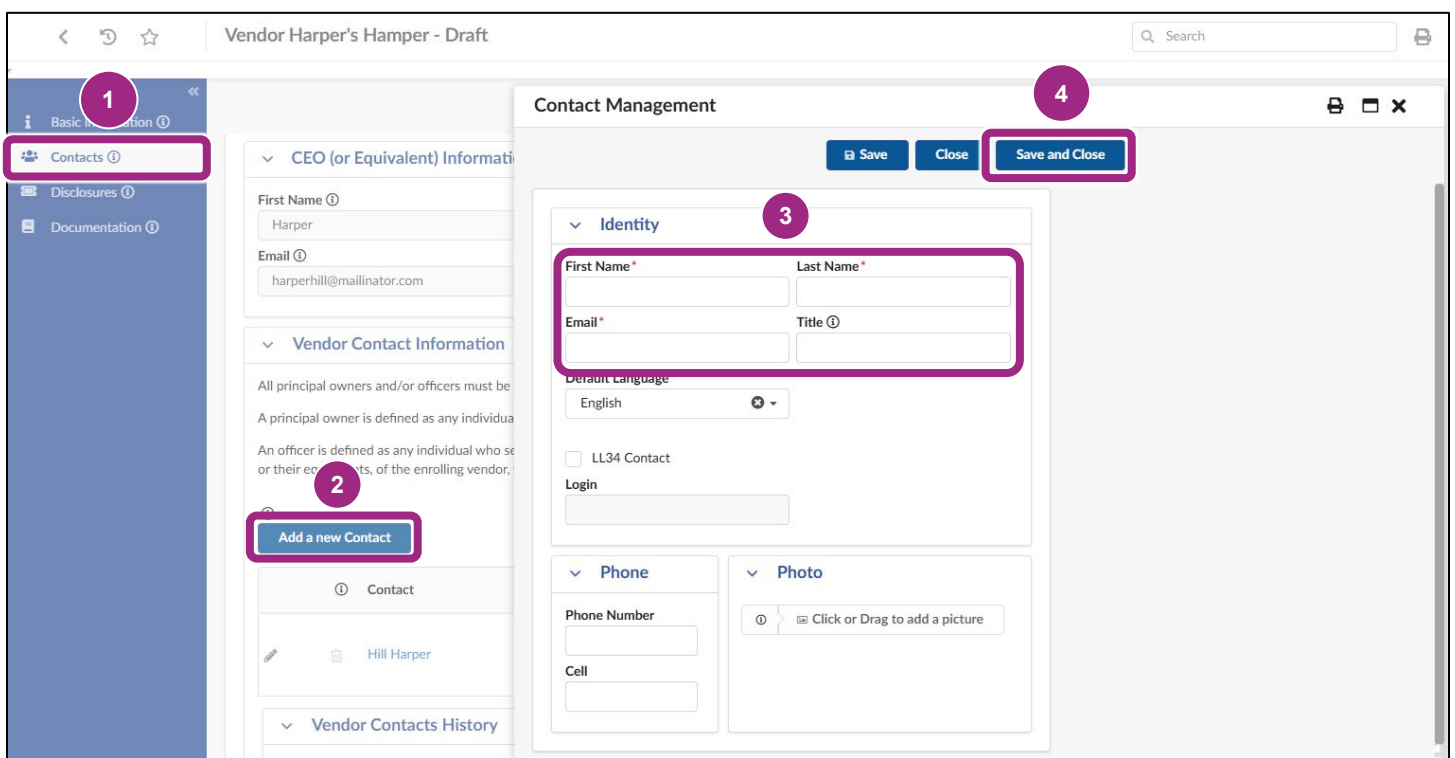
3. Click the **Save and Refresh** button near the top of the page.



Contacts Tab

In the Contacts tab, vendors list all the organization's Contacts which would include principal owners, officers, and anyone else that requires PASSPort user access. Vendors must assign roles to the contacts in this section. The contact who submitted the PASSPort account request is automatically granted the Vendor Admin role and is able to add contacts and assign roles.

1. Click the **Contacts** tab in the left navigation menu.
2. In the Vendor Contact Information section, click the **Add a new Contact** button.
3. In the Contact Management pop-up window, enter the contact's **First Name**, **Last Name**, and **Email** address.
4. Click the **Save and Close** button.



- In the **Profile** column of the Vendor Contact Information table, select **at least one** role for each contact from the drop-down menu. If a role is not selected/saved, the vendor will not be able to submit.

Note: A contact cannot log in unless they register a NYC.ID with an email address that matches the one listed in their contact. Additionally, contacts will not be automatically notified that they have been added to the vendor account. Vendor Admin's should reach out to each new contact to request they create a NYC.ID.

The screenshot shows a table with columns: Contact, Email, Profile, L1 Contact, and Position. Two contacts are listed: Hill Harper (harperhill@mailinator.com) and Jones Renee (reneejone@mailinator.com). The Profile column for Hill Harper has a dropdown menu open, showing a list of roles. A purple box highlights the dropdown menu, and a purple circle with the number 5 is positioned above it. Below the table is a section titled 'Vendor Contacts History' with a sub-table showing contact details and actions.

Name	Email	Status
Hill Harper	harperhill@mailinator.com	
Hill Harper	harperhill@mailinator.com	

Tip: Vendor Contact Roles

Each new contact must be assigned at least one system user role. Multiple roles can be selected for a contact. The following roles and tasks are relevant to completing the Vendor Enrollment process:

- **Vendor Admin:** Has full access to all Account Management and Vendor Enrollment functionalities except signing the Vendor Enrollment Package. MOCS recommends every organization has at least two contacts with the Vendor Admin role. This role is mandatory.
- **Signatory:** Has full access to Vendor Enrollment functionalities and is the only role that can sign the Vendor Enrollment Package. This role is mandatory.
- **Contributor:** Can enter information but has limited functionality. This role is optional.

- Click the **Save and Refresh** button near the top of the page.




Disclosures Tab

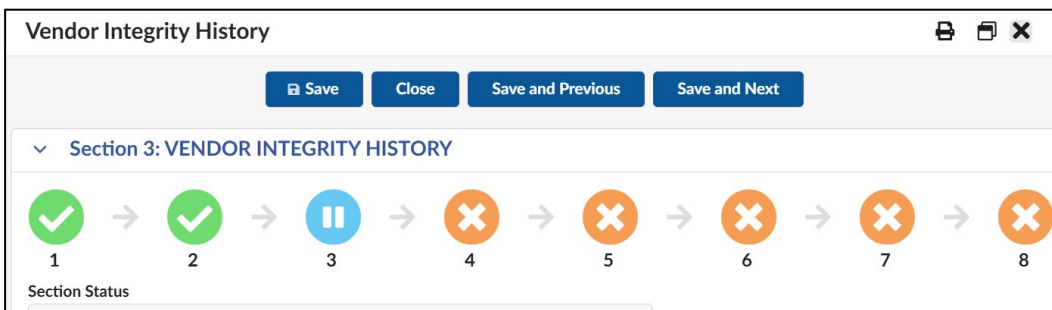
In the Disclosures tab, vendors are required to:

- Answer and complete all eight sections of the Vendor Questionnaire carefully.
- Identify all Principal Owner(s) and all Officer(s) in your organization—all individuals must first be added to the **Contacts** tab.
- Ensure Principal Questionnaires are completed by each identified Owner and Officer.
- Identify Parent and/or Controlling Entities—the Parent must have an approved account request.

Tip: Visual Progress Cues in PASSPort

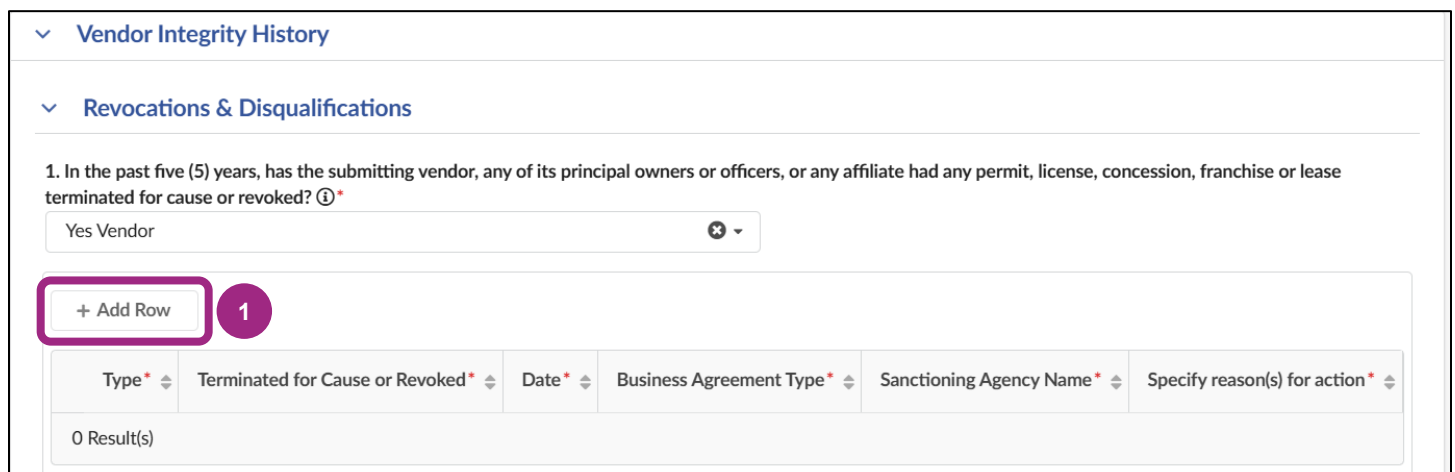
PASSPort will provide you with visual progress cues as you complete the Vendor and Principal Questionnaires.

- An orange circle with a white x  indicates a section that is Not Started.
- A blue circle with a white pause symbol  indicates a section that is In Progress.
- A green circle with a white checkmark  indicates a section that is Completed.



If a vendor responds **Yes** to any question in the Questionnaire, additional details must be provided by the vendor by adding rows to enter the required information.

1. Click the **+ Add Row** button and then enter the details related to the question.



Vendor Integrity History

Revocations & Disqualifications

1. In the past five (5) years, has the submitting vendor, any of its principal owners or officers, or any affiliate had any permit, license, concession, franchise or lease terminated for cause or revoked? ⓘ*

Yes Vendor

+ Add Row 1

Type*	Terminated for Cause or Revoked*	Date*	Business Agreement Type*	Sanctioning Agency Name*	Specify reason(s) for action*
0 Result(s)					

2. Click the **Save** button at the top of the page to save your entries.
3. To add additional rows, repeat steps 1 and 2.

Tip: Adding Details and Important Information

Make sure that the details you add contain complete and pertinent information. For example, when providing details about an investigation, include specific dates, a description of what happened, and a summary of the results. There is a 500-character limit in the investigation summary.

Investigative History

Investigations

1. In the past five (5) years, have any of the submitting vendors or any of the submitting vendors' 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? ⓘ *

Yes Vendor

+ Add Row

Type *	Name of Investigating Government Agency *	Date Initiated *	Date Completed * ⓘ	Still Ongoing	Investigation Summary *
Vendor ⓘ	New York Police Department	2/1/2024	3/1/2024	<input type="checkbox"/>	In this text box, please provide details about the investigations, including specific dates, a description of what happened, and a summary of the results.

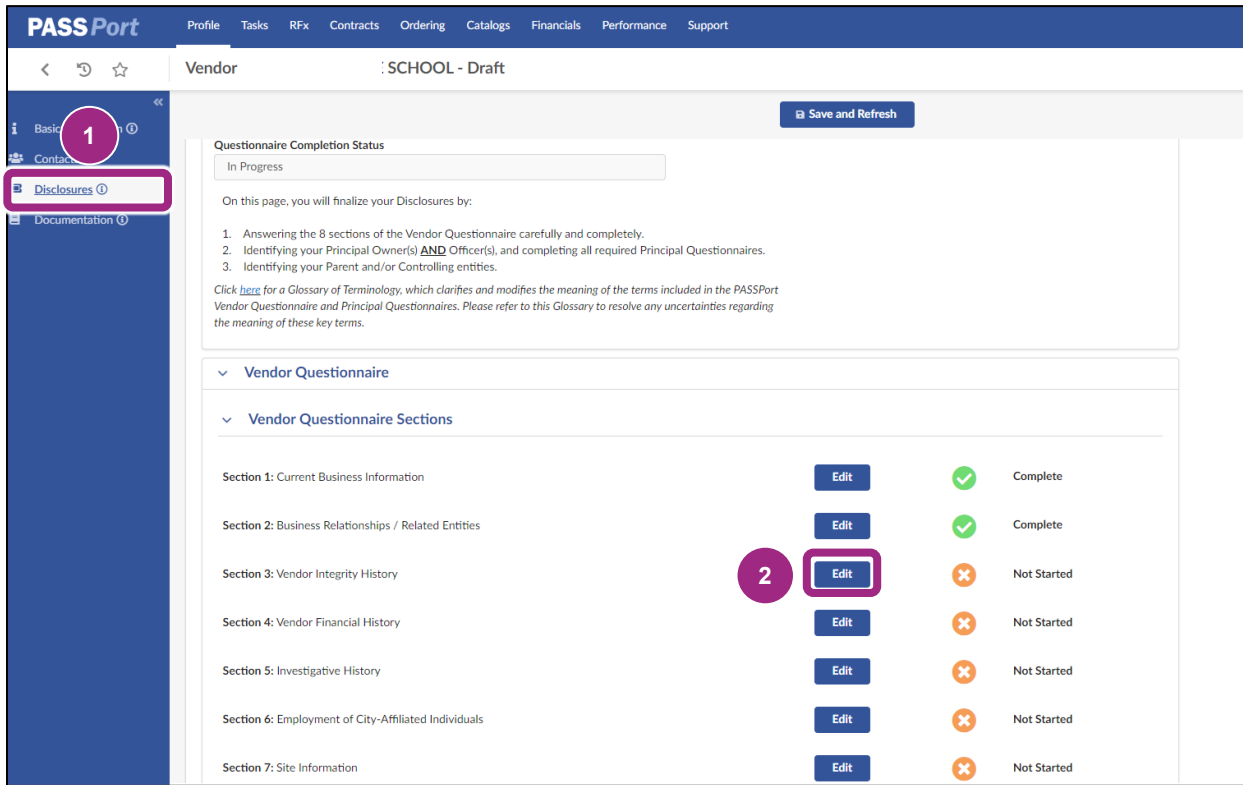
0 Result(s)

Do not use acronyms or shortened names. For example, write “New York Police Department” instead of “NYPD” or “N.Y.P.D.”

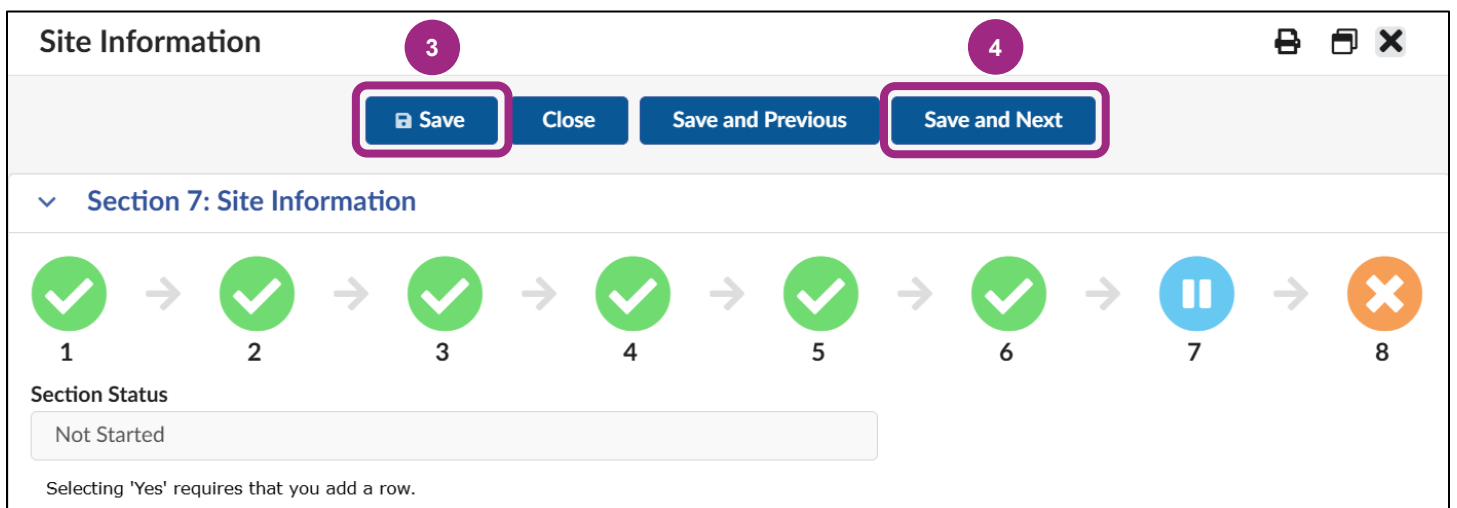
Vendor Questionnaire

Follow the steps below to complete the Vendor Questionnaire.

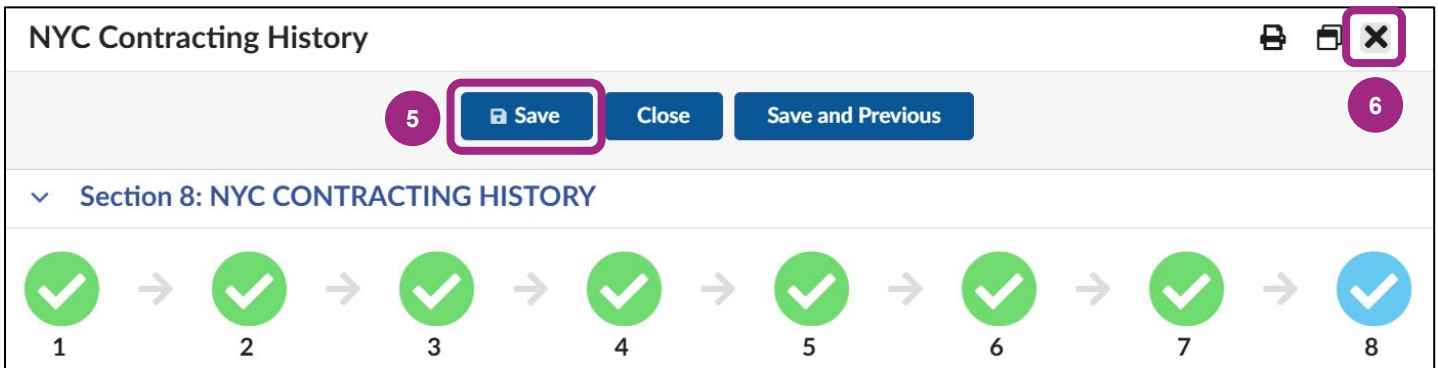
1. Click the **Disclosures** tab in the left navigation menu.
2. In the Vendor Questionnaire section, click the **Edit** button to open a section in the Vendor Questionnaire.



3. Answer all questions within each section.
Regularly click **Save** to save the information entered.
4. To continue to the next Section, click the **Save and Next** button.



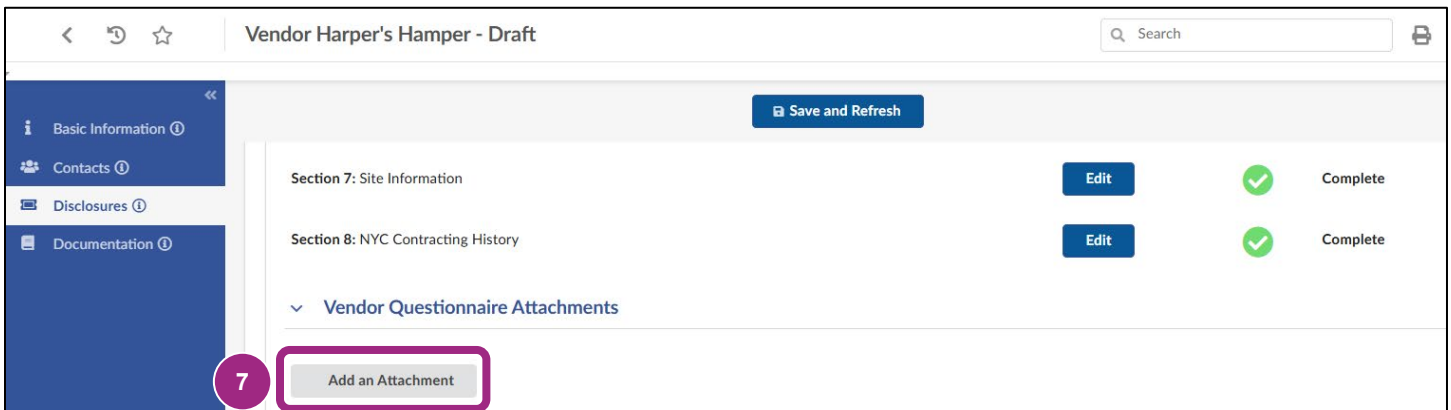
- After all sections of the Vendor Questionnaire are Complete, click the **Save** button.
- Click the **X**-icon at the top right of the window to close the Vendor Questionnaire pop-up window. PASSPort will then update the **Questionnaire Completion Status**.



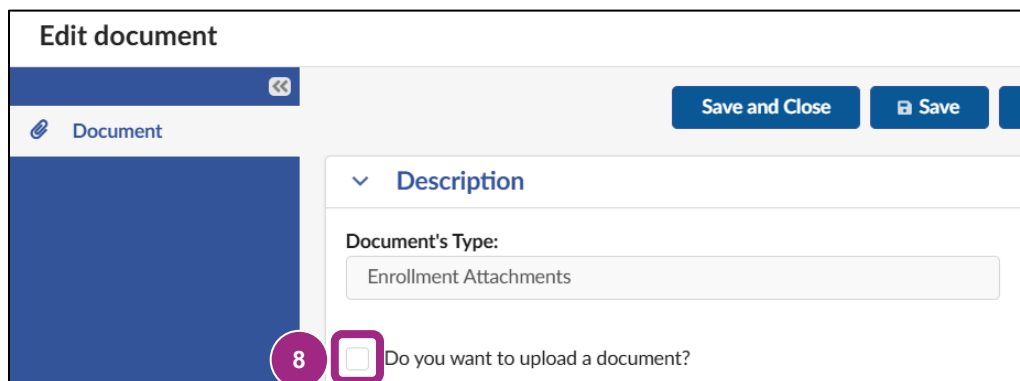
If a vendor responds **Yes** to any question in the Questionnaire, in addition to providing complete and pertinent information within the added row(s), you must also upload **supplemental attachments** to the **Vendor Questionnaire Attachments Section**.

Supplemental attachments should indicate the corresponding section and question number. Follow the steps below to add supplemental attachments to your Vendor Questionnaire.

- Click the **Add an Attachment** button.



- In the **Edit document** window, click the **Do you want to upload a document?** checkbox.



The page refreshes and a red blocking alert appears at the top of the window indicating that a document is required.

9. Click the **Manage Documents** button and follow the prompts to upload a document from your computer or link a document from your PASSPort Vault.

For details on how to upload or link documents, see [Upload or Link Documents to a Task](#).

Note: The document's name should indicate the section and question number to which the attachment corresponds.

10. Add notes in the **Comment** field that indicate what the attachment relates to.

The screenshot shows a web application window titled "Edit document". At the top right, there are three buttons: "Save and Close", "Save", and "Close". Below the header, there is a blue sidebar with a "Document" label and a back arrow. The main content area is divided into sections: "Alert", "Description", and "Comments".

- Alert:** A yellow box with a red exclamation mark icon and the text "- A document upload is required."
- Description:** Contains a "Document's Type:" dropdown menu with "Enrollment Attachments" selected. Below it is a checked checkbox labeled "Do you want to upload a document?". A blue button labeled "Manage Documents" is highlighted with a purple circle and the number "9".
- Vendor:** A text input field containing "Harper's Hamper 123578906".
- Document's Owner:** A text input field containing "HILL Harper".
- Comments:** A section with a "Comment" label and a text input field containing "Add a comment here". This field is highlighted with a purple circle and the number "10".

11. Click the **Save** button.

12. Click the **Close** button to close the window.

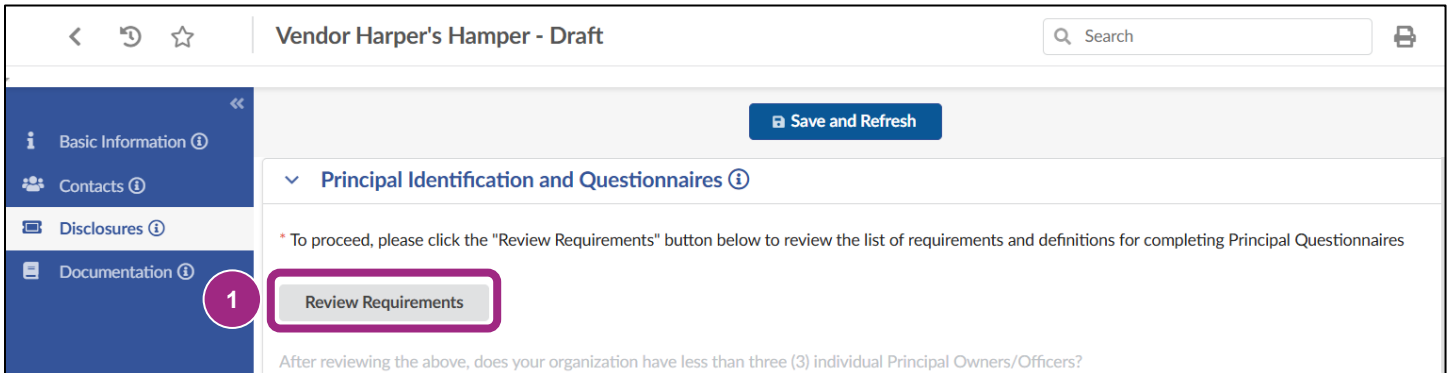
Principal Identification and Questionnaires

Identify Principal Owners and Officers

All Principal Owners and/or Officers must first be listed in the **Contacts** tab to be able to identify them in the **Disclosures** tab. Principal Questionnaires must be submitted by each of your organization's Principal Owners and/or Officers.

Follow the steps below to identify the number of principal owners and officers in your organization.

1. In the Disclosures tab, scroll down to the Principal Identification and Questionnaires section, and click the **Review Requirements** button.

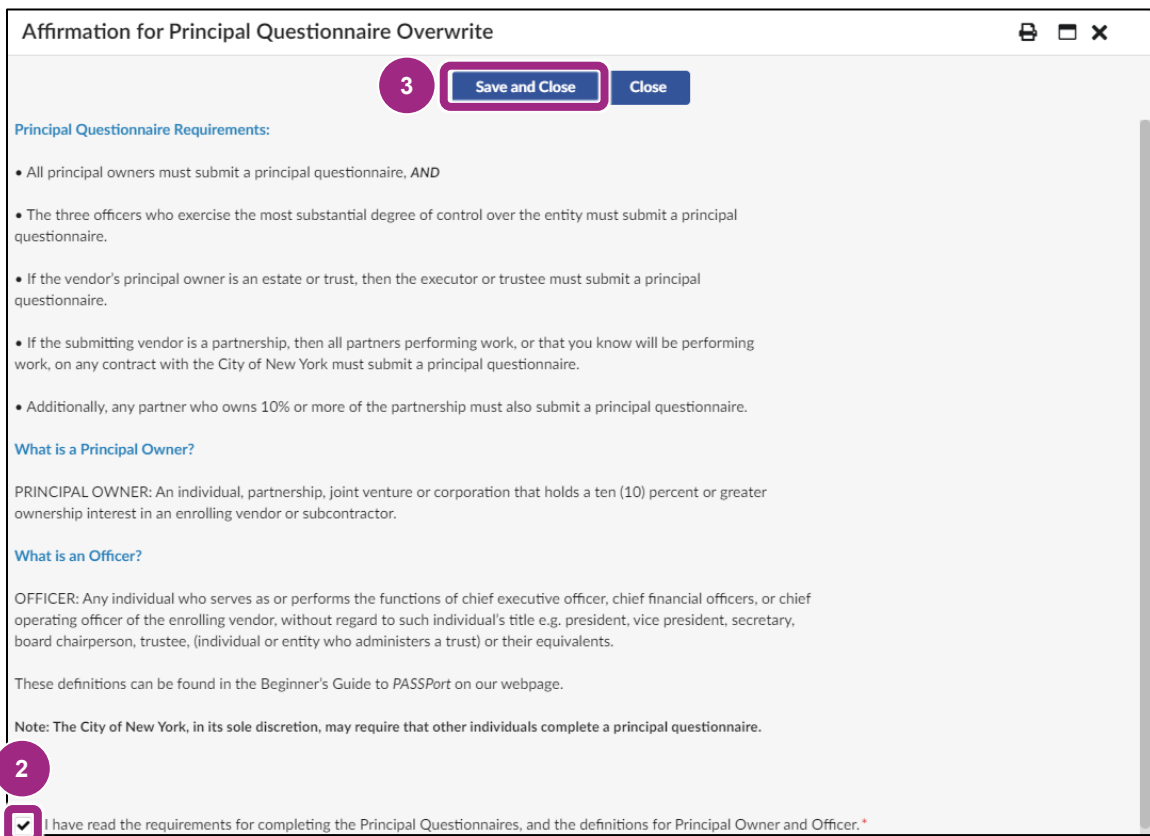


The Affirmation for Principal Questionnaire Overwrite window appears.

2. Read the requirements for completing the Principal Questionnaires and the definitions for principal owner and officer.

Then, click the **checkbox** at the bottom of the window to confirm you have read all contents.

3. Click the **Save and Close** button at the top of the window.



New information will appear on the screen asking vendors to identify if their organization has fewer than three (3) individual Principal Owners/Officers.

4. Click the dropdown at the far right and begin typing to select the appropriate response in the drop-down menu. The response options include:
 - No
 - Yes, Only 1
 - Yes, Only 2

Principal Identification and Questionnaires ⓘ

* To proceed, please click the "Review Requirements" button below to review the list of requirements and definitions for completing Principal Questionnaires ✓

Review Requirements

After reviewing the above, does your organization have less than three (3) individual Principal Owners/Officers? ⓘ

Note: If this vendor is a Parent/Controlling entity that is not currently or not intending to do business with the City, please [Contact MOCS](#) to request a possible change in Principal Questionnaire requirements.

* Please click on below button to complete your Principal Overwrite Request

4

Type at least 3 character(s) to start searching...

See All

5. Click the **Save and Refresh** button.

If an organization has less than three (3) individual Principal Owners/Officers and is a parent company, the parent company is required to complete an additional process—the **Principal Overwrite Request**.

6. Click the second **Review Requirements** button at the bottom of the section.

Principal Identification and Questionnaires ⓘ

* To proceed, please click the "Review Requirements" button below to review the list of requirements and definitions for completing Principal Questionnaires ✓

Review Requirements

After reviewing the above, does your organization have less than three (3) individual Principal Owners/Officers? ⓘ

Note: If this vendor is a Parent/Controlling entity that is not currently or not intending to do business with the City, please [Contact MOCS](#) to request a possible change in Principal Questionnaire requirements.

* Please click on below button to complete your Principal Overwrite Request

Yes, Only 1

6

Review Requirements

The **Affirmation for Principal Overwrite Request** window appears.

7. Read the text and click the **checkbox** to the left of "I certify the above."
8. Click the **Save and Close** button.

You are now ready to identify your organization's principals and/or officers.

Affirmation for Principal Questionnaire Overwrite

8
Save and Close
Close

Principal Overwrite Request

"I herewith confirm that my organization has less than three (3) *individual* Principal Owner(s) and Officer(s)."

Note: This does not preclude the disclosing of *entity* principal owner(s), if required.

7
 I certify the above.*

Follow the steps below to identify your Principal Owners and/or Officers:

9. Click the drop-down arrow:

* Please click on below button to complete your Principal Overwrite Request ✓

Review Requirements

Select your Principal(s) and / or Officer(s)

▼
9

Type at least 3 character(s) to start searching...

See All

10. Type the Principal Owner or Officers name into the **Select your Principal(s) and/or Officer(s)** drop-down field. The name will appear in the menu below. Select it to add the name to the Principal Identification and Questionnaires table. Repeat this step to add additional Owners and/or Officers.

Select your Principal(s) and / or Officer(s)





▼

Hill Harper

10

See All

11. In the **Role** column, select either Principal Owner or Officer.


First Name	Last Name	Role*	Start or Edit Questionnaire	Status
  Harper	Hill	<div style="border: 2px solid purple; padding: 2px;">Officer Principal Owner</div>		Not Started
1 Result(s)				

12. Click the **Save and Refresh** button.

Complete the Principal Questionnaire

The Principal Questionnaire consists of six sections. Follow the steps below to begin the Principal Questionnaire for each Principal Owner and Officer in your organization.



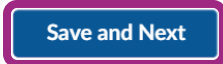
1. Click the **Start or Edit Questionnaire** button within the Principal Identification and Questionnaires table.

First Name	Last Name	Role*	Start or Edit Questionnaire	Status
Harper	Hill	Principal Owner		Not Started

1 Result(s)

2. Answer all questions within the six (6) sections.
Be sure to regularly click the **Save** button to save the information entered.
3. To continue to the next section, click the **Save and Next** button.

Basic Information

  | 

Section 1: BASIC INFORMATION

1 → 2 → 3 → 4 → 5 → 6

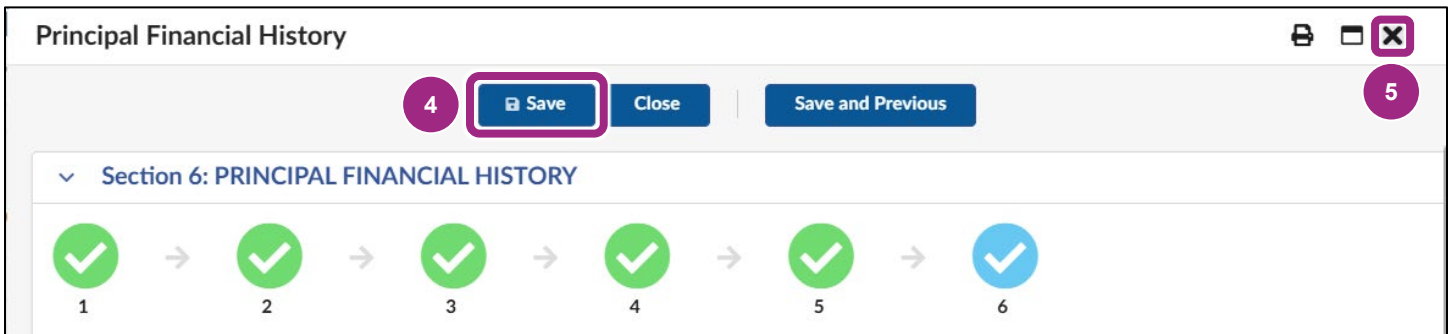
Basic Information Status
Not Started

Principal Questionnaire Completion Status
Not Started

Vendor Status
Draft

Selecting 'Yes' requires that you add a row.

- After the six sections of the questionnaire are complete, click the **Save** button.
- Click the **X**-icon to close the Principal Questionnaire pop-up window and return to the Disclosures tab. The questionnaire status will update.

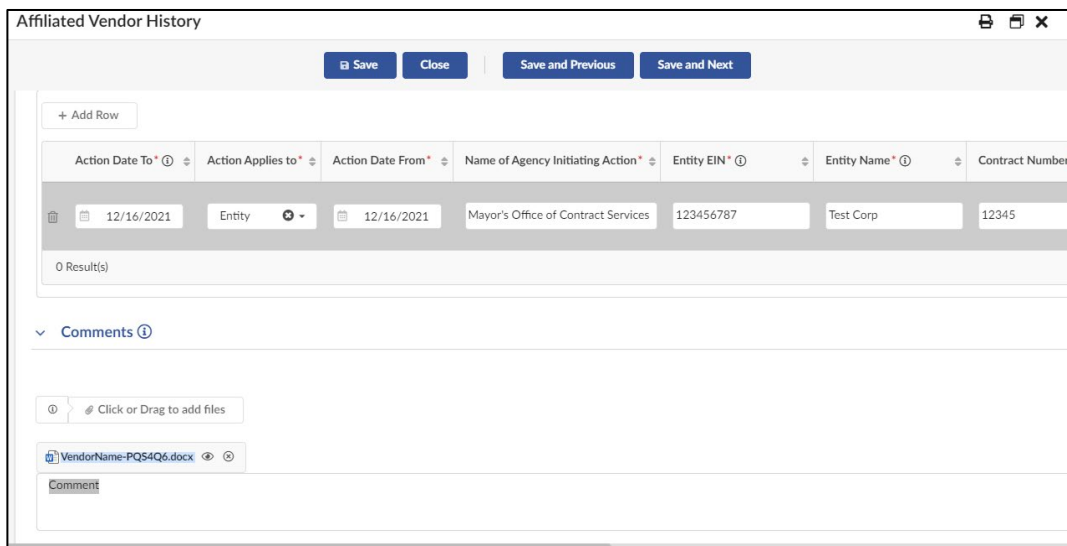


- Click the **Save and Refresh** button towards the top of the Disclosures tab.

Tip: Adding Attachments to Principal Questionnaires

In addition to clicking the **Add Row** button to provide relevant details to a **Yes** response in the Principal Questionnaire, Principal Owners and Officers can upload documents at the bottom of each of the six questionnaire sections.











Click the **Click or Drag to add files** button and select the relevant file to upload. Please be sure to name the file so that it identifies the relevant section and question of the Principal Questionnaire (e.g., an attachment for the Principal Questionnaire Section 4 and Question 6 should be named “VendorName – PQS4Q6”).



Check the Principal Questionnaire Status

The **Status** column shows the progress of each Principal Owner/Officer Principal Questionnaire. The screenshot below shows an example where the Principal Owner's Questionnaire is Complete and the Officer's Questionnaire has Not Started.

Note: Contacts added as a Principal Owner/Officer in the Principal Identification and Questionnaires table are **not** automatically notified that this task is pending in PASSPort. Reach out to each contact listed in the table directly to request they log in to PASSPort and complete the questionnaire.

First Name	Last Name	Role*	Start or Edit Questionnaire	Status
  Harper	Hill	Principal Owner 		Complete 
  hhs	itops staff	Officer 		Not Started
2 Result(s)				

Parent/Controlling Entities Identification

About Parent/Controlling Entities

As part of the Vendor Enrollment process, Parent and/or Controlling Entities must be identified in the Disclosures tab.

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 hold 10% or more ownership of the business or have the right to direct daily operations.

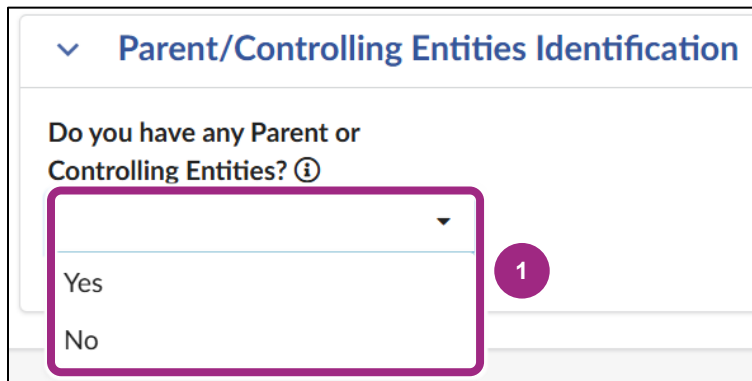
To identify the parent and/or controlling entity in PASSPort, the parent and/or controlling entity must have a PASSPort account. In order for your organization's enrollment to be considered completed, the parent and/or controlling entity's submission must also be filed.

Identify Parent/Controlling Entities

Follow the steps below to complete the **Parent/Controlling Entities Identification** section in the Disclosures tab of the Vendor Profile.

Important: The entities listed in this section **must** match the entity (or entities) disclosed in Section 2 Question 2 of the Vendor Questionnaire.

1. In the Parent/Controlling Entities Identification section, click the **Do you have any Parent or Controlling Entities** drop-down field and select either **Yes** or **No** from the drop-down menu.



Parent/Controlling Entities Identification

Do you have any Parent or Controlling Entities? ⓘ

Yes

No

- If your answer is **No**, click the **Save and Refresh** button near the top of the page.
- If your answer is **Yes**, type the name of the entity in the **Select your Parent and/or Controlling Entity** drop-down field and select it from the below menu.

Note: The entity's name will not appear if they do not have an approved account request.

Vendor Harper's Hamper - Draft

2 Save and Refresh

Parent/Controlling Entities Identification

Do you have any Parent or Controlling Entities? ⓘ

Yes

Select your Parent and/or Controlling Entities

3

Type at least 3 character(s) to start searching...

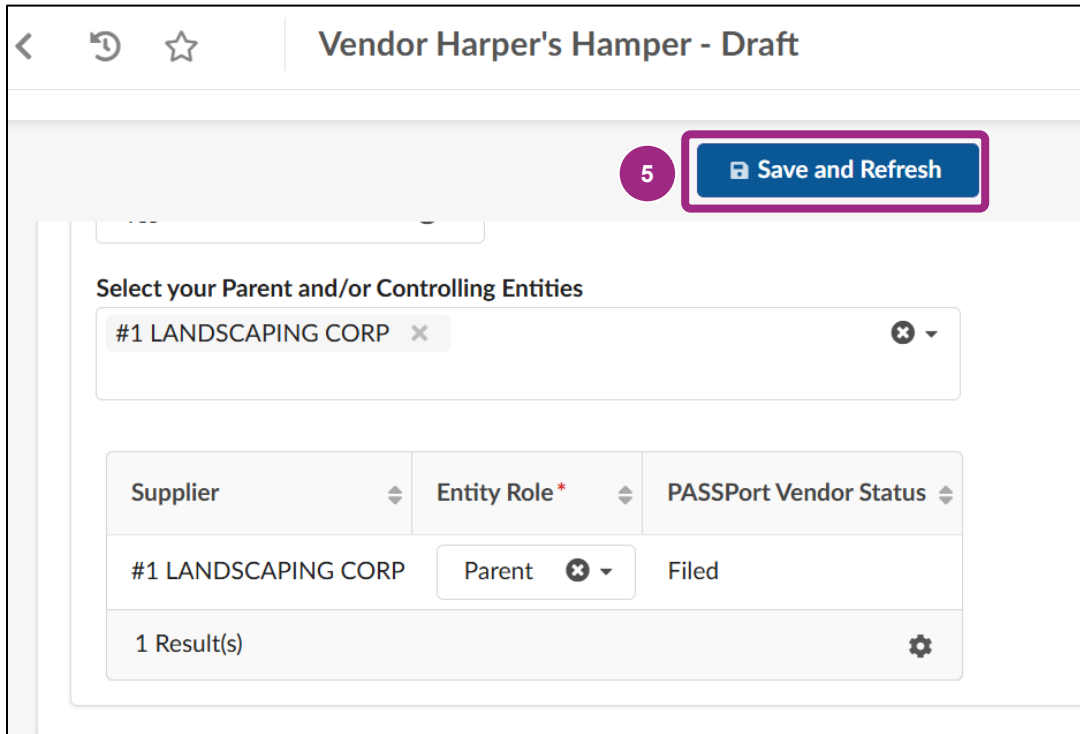
See All

The page refreshes and a table including the entity's name and PASSPort vendor status appears below the drop-down menu.

- In the **Entity Role** column, select either **Controlling** or **Parent** from the drop-down menu.

Supplier	Entity Role*	PASSPort Vendor Status
#1 LANDSCAPING CORP	Controlling	Filed
1 Result(s)	Parent	

5. Click the **Save and Refresh** button near the top of the page. In this example, the vendor identified a Parent organization whose PASSPort Vendor Status is Filed.



6. Repeat this process to add additional parent or controlling entities.

Tip: Missing Parent/Controlling Entity

If the vendor's parent or controlling entity is not found in PASSPort, that entity does not have a PASSPort account. Once the entity has a PASSPort account, it can be identified in the Disclosures tab under Parent/Controlling Entities Identification.

Documentation Tab

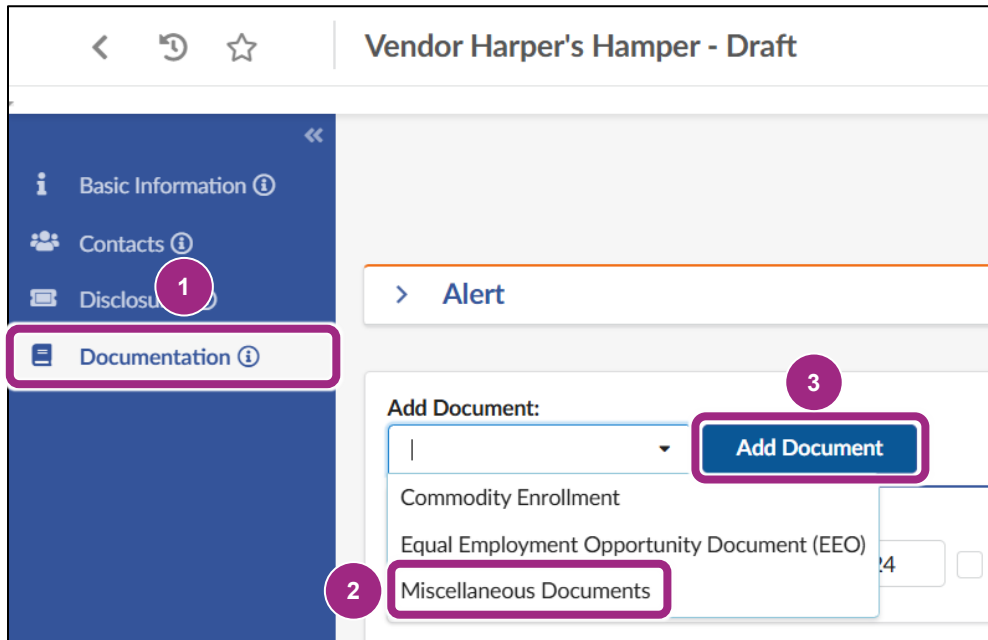
The Documentation tab is where vendors upload their organization's required Certificate of Incorporation (COI) or equivalent document. Alternative COI equivalent document names may be:

- Articles of Incorporation
- Articles of Association
- Business Certificate
- Corporate Charter

Documents related to the Vendor Questionnaire should **not** be uploaded in this section.

Follow the steps below to complete the Documentation tab.

1. Click the **Documentation** tab in the left navigation menu of the Vendor Profile.
2. Click the **Add Document** drop-down field and select **Miscellaneous Documents** from the drop-down menu.
3. Click the **Add Document** button.



The Edit Document window appears.

4. Click the **Document Type** drop-down field and select **Miscellaneous / Certificate of Incorporation** from the drop-down menu.

Important: Regardless of whether a vendor has a Certificate of Incorporation or an equivalent, such as Articles of Incorporation, the vendor must select **Miscellaneous / Certificate of Incorporation** from the drop-down menu to satisfy the requirement. PASSPort requires a document submission with this document type selected.

The screenshot shows the 'Edit document' window with a blue sidebar on the left. At the top right, there are three buttons: 'Save and Close', 'Save', and 'Close'. Below the sidebar, there is a 'Document' header. The main content area is titled 'Description' and contains the instruction: 'Please complete the required fields (*) and click Save to reveal the Manage Documents button to upload a document.' There are two dropdown menus: 'Document Type*' and 'Document Folder'. The 'Document Type*' dropdown is open, showing a list of options. The first option, 'Miscellaneous Documents / Certificate of Incorporation', is highlighted with a red box and a red circle containing the number 4. Other options include 'Miscellaneous Documents / Certification of Vaccine Mandate', 'Miscellaneous Documents / Charities Bureau Filing Documentation', 'Miscellaneous Documents / Child Care Program Vaccine Certification', and 'Miscellaneous Documents / COVID-Safe Requirement Certification'. Below the dropdowns, there is a 'Document's Owner:' field with the text 'ITOPS STAFF hhs'.

5. In the **Document's name** field, enter the document's name.
6. Click the **Save** button at the top of the window.

The screenshot shows the 'Edit document' window with the same layout as the previous screenshot. The 'Document Type*' dropdown is now closed and shows 'Certificate of Incorporation'. The 'Document's name*' field is highlighted with a red box and a red circle containing the number 5. The 'Document's validity from' field shows '12/12/2024' and the 'to' field is empty. The 'Save' button at the top right is highlighted with a red box and a red circle containing the number 6.

The page refreshes and a red blocking alert appears at the top of the window indicating that a document is required.

- Click the **Manage Documents** button and follow the prompts to upload the Certificate of Incorporation or equivalent document from your computer or link the document from your PASSPort Vault.

For details on how to upload or link documents, see [Upload or Link Documents to a Task](#).

The screenshot shows the 'Edit document' window with a top navigation bar containing buttons for 'Save and Close', 'Save', 'Cancel', 'Submit', and 'Close'. Below the navigation bar, there is a left sidebar with a 'Document' icon and a main content area. The main content area has a 'Document' header and a 'Manage Documents' button highlighted with a red circle and the number 7. Below the button, there are sections for 'Alert' (with a message: '- A document upload is required.') and 'Description' (with fields for 'Document Type', 'Document Folder', 'Document's name', and 'Document's validity from').

- After ensuring you have uploaded the correct document, click the **Submit** button.

Note: A document cannot be deleted once it has been submitted. If an incorrect document was submitted, upload and submit a new document and indicate in the Comment field that the previous document submission was made in error.

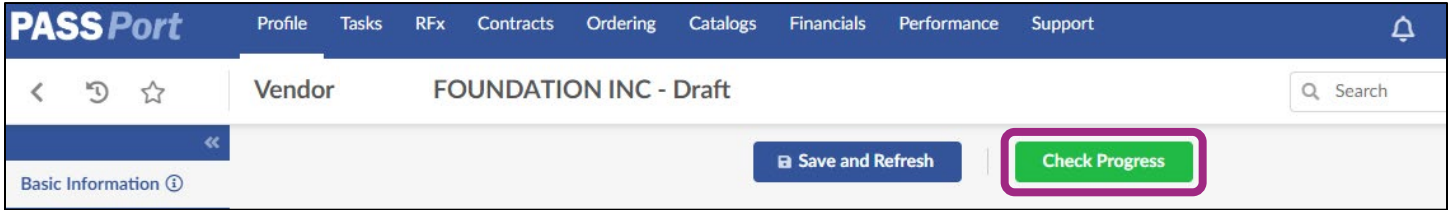
The screenshot shows the 'Edit document' window with the 'Submit' button highlighted with a red circle and the number 8. The 'Save and Close', 'Save', and 'Cancel' buttons are also visible in the top navigation bar.

- Then, click the **Close** button.

The screenshot shows the 'Edit document' window with the 'Close' button highlighted with a red circle and the number 9. Below the button, there is a success message box with three items: 'Data has been saved', 'The activity Approval has been automatically validated', and 'Validated successfully'.

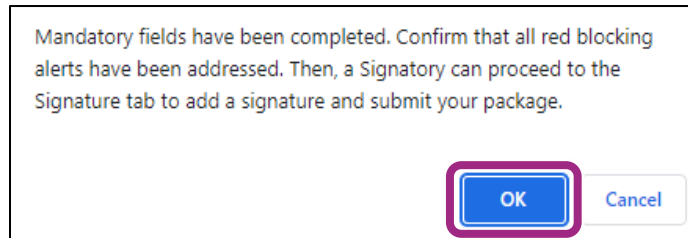
Click the Check Progress Button

Once the entire Vendor Enrollment Package has been completed, the Vendor Admin must click the **Check Progress** button. This is a critical step that must be completed to move the PASSPort Vendor Status from Draft to **Ready to Submit** - a status indicating that the Vendor Enrollment Package is now ready to be signed and submitted.

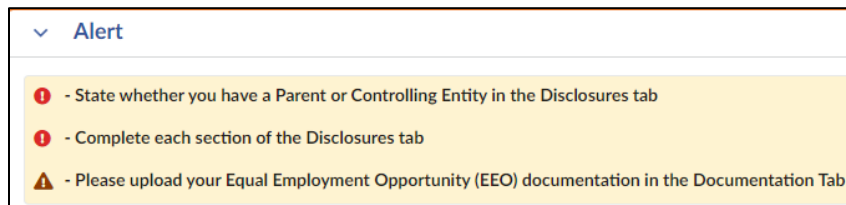


Note: Once the Vendor Enrollment Package is in Ready to Submit status, changes can no longer be made. To return to Draft status, click **Return to Preparation Package**.

If the **Check Progress** button has been clicked and the required information is complete, a system message will appear confirming that the mandatory fields have been completed. Click **OK**.



If required information is missing in the Basic Information, Contacts, Disclosures or Documents tabs, PASSPort alerts will display in the **Alerts** section in any tab.

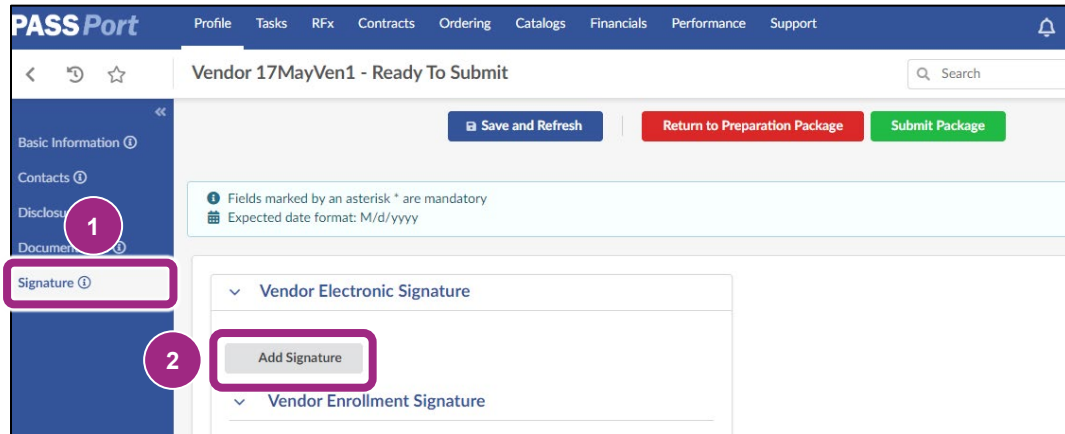


Complete the required actions and click the **Check Progress** button again. Vendors will not be able to proceed to the **Signature** tab if the Vendor Enrollment Package is incomplete.

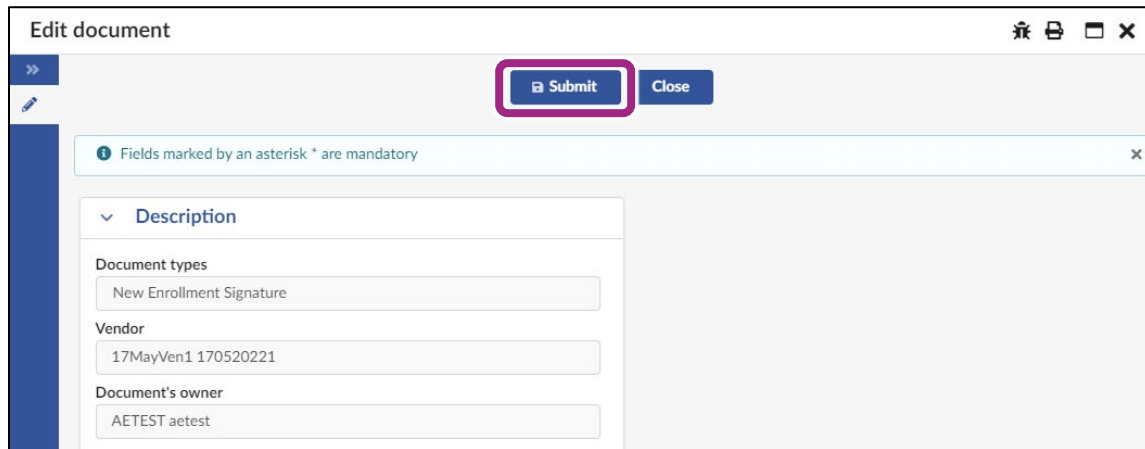
Signature Tab

Once all parts of the Vendor Enrollment Package have been completed and the Vendor Admin has clicked the **Check Progress** button, the PASSPort Vendor Status will update from Draft to **Ready to Submit**. The Signatory must then review the entire package and its attachments before signing and submitting it. Only Signatories can add a signature. Only one signature is required.

1. Click the **Signature** tab in the left navigation menu.
2. In the Vendor Electronic Signature section, click the **Add Signature** button.



3. In the Edit document window, click the **Submit** button to create a new e-Signature.



4. Read all the text within the **PASSPort Questionnaire Certification** section.
Then, click the **I certify all of above** checkbox.
5. In the **NYC.ID Password** field, enter the same password used to log in to your PASSPort account.

Freedom of Information Law (FOIL), a court order, or other law, or otherwise be made publicly available pursuant to New York City Charter 1064;

- I understand that at the time of execution of any contract with the City, I may be required to certify that the information I have supplied remains full, complete, and accurate, and I further understand that I must update the responses to these Questionnaires at the time of any change in response to any question in any Questionnaire, but in any event, no later than when the City requests the Submitting Vendor to certify that the information supplied remains full, complete, and accurate;
- The Submitting Vendor was not founded or established and is not operated in a manner to evade the application or defeat the purpose of Section 6-116.2, subdivision (b) of the City's Administrative Code, and is not the successor, assignee, or affiliate of an entity that is ineligible to bid or propose on contracts, or against which a proceeding to determine eligibility to bid or propose on contracts is pending;
- I have fully read and agree to the Terms and Conditions of PASSPort.

4 I certify all of above*

NYC.ID Email ⓘ
aetest@t.com

NYC.ID Password*

5

6. Click the **Sign** button near the top of the page to add your e-Signature.

6

Close Cancel Sign

A green message stating **Signature has been successful!** will be displayed.

7. Click the **Close** button in the top center of the signature pop-up window.

7

Close

• I understand that at the time of execution of any contract with the City, I may be required to certify that the information I have supplied remains full, complete, and accurate, and I further understand that I must update the responses to these Questionnaires at the time of any change in response to any question in any Questionnaire, but in any event, no later than when the City requests the Submitting Vendor to certify that the information supplied remains full, complete, and accurate;

• I understand that the information collected through PASSPort may, if not protected by federal, state, or local law, be subject to disclosure pursuant to the Freedom of Information Law (FOIL), a court order, or other law, or otherwise be made publicly available pursuant to New York City Charter 1064;

• I understand that at the time of execution of any contract with the City, I may be required to certify that the information I have supplied remains full, complete, and accurate, and I further understand that I must update the responses to these Questionnaires at the time of any change in response to any question in any Questionnaire, but in any event, no later than when the City requests the Submitting Vendor to certify that the information supplied remains full, complete, and accurate;

• The Submitting Vendor was not founded or established and is not operated in a manner to evade the application or defeat the purpose of Section 6-116.2, subdivision (b) of the City's Administrative Code, and is not the successor, assignee, or affiliate of an entity that is ineligible to bid or propose on contracts, or against which a proceeding to determine eligibility to bid or propose on contracts is pending;

• I have fully read and agree to the Terms and Conditions of PASSPort.

✓ I certify all of above

NYC.ID Email ⓘ
aetest@t.com

Signature has been successful!

The e-signature is displayed in the **Vendor Enrollment Signature** section with the name of the Signatory who signed the package, as well as the date and time it was signed.

The screenshot shows the PASSPort web application interface. The top navigation bar includes the PASSPort logo and menu items: Profile, Tasks, RFx, Contracts, Ordering, Catalogs, Financials, Performance, and Support. The user's name, Aetest A., is visible in the top right corner. The main header displays the package name "Vendor 17MayVen1 - Ready To Submit" and a search bar. Below the header are three buttons: "Save and Refresh", "Return to Preparation Package", and "Submit Package". A light blue information box contains the text: "Fields marked by an asterisk * are mandatory" and "Expected date format: M/d/yyyy". The main content area is divided into sections: "Vendor Electronic Signature" and "Vendor Enrollment Signature". The "Vendor Enrollment Signature" section is expanded, showing a table with the following data:

Owner	Signature Date (Your Local Time)
aetest aetest	4/1/2024 12:51:11 PM

A red arrow points to the "Vendor Enrollment Signature" section header.

Submit the Vendor Enrollment Package

Click the **Submit Package** button near the top of the page to submit the Vendor Enrollment Package.

The screenshot shows the PASSPort system interface. The top navigation bar includes 'Profile', 'Tasks', 'RFx', 'Contracts', 'Ordering', 'Catalogs', 'Financials', 'Performance', and 'Support'. The user is logged in as 'Aetest A.'. The main header displays 'Vendor 17MayVen1 - Ready To Submit' and a search bar. Below the header, there are three buttons: 'Save and Refresh', 'Return to Preparation Package', and 'Submit Package' (highlighted with a red box). A message states: 'Fields marked by an asterisk * are mandatory. Expected date format: M/d/yyyy'. The main content area is titled 'Vendor Electronic Signature' and contains an 'Add Signature' button and a 'Vendor Enrollment Signature' section. The 'Vendor Enrollment Signature' section includes a table with the following data:

Owner	Signature Date (Your Local Time)
aetest aetest	4/1/2024 12:51:11 PM

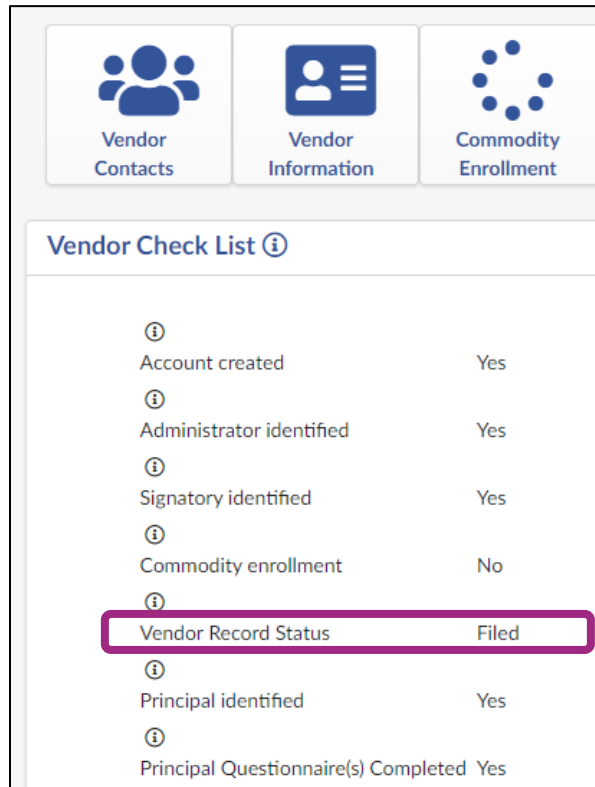
Note: Adding the Signature and Submitting the Vendor Enrollment Package

Adding an e-signature is not the same as submitting the Vendor Enrollment Package. Ensure the e-signature is displayed in the **Vendor Enrollment Signature** table and then click the **Submit Package** button.

Next Steps

Vendors may confirm whether their organization has completed filing their enrollment package by viewing their **Vendor Record Status** on the PASSPort Homepage.

If the Vendor Record Status lists “Filed”, that confirms that the vendor has successfully enrolled in PASSPort.



Next to the **Vendor Record Status** the following PASSPort Vendor Statuses may display:

- **Draft** – The Vendor Enrollment Package is incomplete.
- **Filed** – Vendor Enrollment Package has been filed successfully. Note: This does not guarantee a contract.
- **In Review** – Submission is pending review and, if needed, MOCS will reach out for additional information.
- **Pending Parent/Controlling Entity** – If a vendor has a parent or controlling entity, then that entity must also complete the Vendor Enrollment process in PASSPort and have a PASSPort Vendor Status of Filed.
- **Ready to Submit** – All required information has been entered for the Vendor Enrollment Package and a Vendor Admin has clicked the **Check Progress** button. An e-signature must be added and the **Submit Package** button must be clicked.

Vendors who need to make changes to their disclosures after they have Filed should do so using the [Change Request process](#). Vendors should also review their Disclosures at least once a year to make sure the information is current and accurate.

Best Practices

- It generally takes vendors an average of 3-5 days to complete the vendor enrollment process. Make sure you set aside enough time to complete the process.
- PASSPort does not automatically notify contacts when they are added to the vendor account, so it's important to connect with each contact directly to inform them. New contacts can review the [Create a PASSPort Account](#) guide and follow the instructions in **Part 1: Registering a NYC.ID** to create login credentials.
- Principal Owners and Officers must complete their own Principal Questionnaires. To make the process more seamless, complete the steps below:
 - Add your individual Principal Owners and Officers to the Contacts tab.
 - Assign each person a user role.
 - Share the [Create a PASSPort Account](#) guide with new contacts so they can log in to the system.
 - Share the [Complete PASSPort Vendor Enrollment](#) guide with your Principal Owners and Officers, and
 - Direct them to the [Complete a Principal Questionnaire](#) section of the guide for instructions.
- It's your responsibility to keep your enrollment updated at all times. We recommend you review it at least once a year and make updates as soon as they occur.
- Once your enrollment questionnaire is Filed, you can no longer make changes and need to submit a Change Request. For more information on how to submit a Change Request, see [Update Your Enrollment Filing](#).
- Parent/Controlling Entities are required to also update their submission when subsidiaries and/or controlled entities submit updates/changes, so be sure to keep your Parent/Controlling Entity informed of any changes your organization makes via Change Request.

Supplemental Learning Resources

- [Webinar Recording: Completing the Vendor Enrollment Package](#)
- [Glossary: PASSPort Vendor Enrollment](#)
- [PASSPort FAQ](#)
- www.nyc.gov/mocshelp
- [Resources Library](#)