

Creating and Submitting a Budget Modification (POCR) in PASSPort

Congratulations! Your contract has been officially registered. Before you can submit invoices for reimbursement, you must first create and submit a **Purchase Order Change Request (POCR)**, also known as a **budget modification**. The POCR establishes your budget line items and must be approved before any invoice expenses can be submitted.

Follow the steps below to complete your budget setup.

Step 1: Log in to PASSPort

Access PASSPort using the following link:

PASSPort Login:

<https://passport.cityofnewyork.us/page.aspx/en/usr/login?ReturnUrl=%2Fpage.aspx%2Fen%2Fbuy%2Fhomepage>

After logging in:

1. Navigate to **Financials** → **Browse Contract Budgets**.
2. Locate your active **FY___ Purchase Order (PO)**.
3. Select the active Purchase Order.
4. Click the **pencil icon** next to the Purchase Order to begin making changes.

Step 2: Create a Purchase Order Change Request (POCR)

1. Select **Create PO Change Request** at the top of the page.
2. On the **Select Purchase Order Change Request Type** page:
 - Select **Budget Change Only** from the drop-down menu.
 - Enter **Create Budget** in the **Change Request Reason** field.
 - Click **Submit**.

A new POCR number will be generated. Select the POCR link to access your request.

Important: Any future budget modifications must be made using the new/updated POCR number. Once the budget is approved, all invoicing and fund reallocations must be completed using the active Purchase Order Change Request number.

Step 3: Void Existing Budget Lines

1. Within your POCR, select **Budget** from the navigation menu.
2. Under **Detailed FY Budgets**, locate the existing budget lines.
3. Click the **pencil icon** next to each budget line.
4. In the **Add Budget Line** window, enter the following information:

Field	Entry
Sub Budget	DYCD ID - Budget Code/ U of A
Item Category	Other
Budget Line Item	Void Line
Quality	0
Unit Price	1

5. Select **Save and Close**.

If you need assistance identifying your Sub Budget information, contact **budgetandfinancehelp@dycd.nyc.gov** or your assigned Program Manager. Funding allocation details may also be available through DYCD Connect.

Step 4: Add New Budget Lines

After voiding the existing lines, create your budget using the approved allocation amounts.

1. Select **Add Budget Line**.
2. Complete the required fields:

Field	Entry
Item Category	Select the appropriate category
Budget Line Item	Description of the expense
Quality	Allocated amount
Unit Price	1 (<u>ALWAYS</u> enter "1")

3. Select **Save and Close**.
4. Repeat until all budget line items have been entered.

Important: Ensure that the **Amount Still Unallocated** field displays **\$0.00** before submitting.

Allowance Amendments / Discretionary Funding Adjustments

If your award includes an **Allowance Amendment** or additional **Discretionary Funding (Cleared or Uncleared Funds)**, those funds must be included in your budget modification and allocated to the appropriate budget lines before submission.

Step 5: Upload Required Supporting Documentation

1. Navigate to **Overview**.
2. Select **Vendor Files**.
3. Upload or drag all applicable supporting documents into the vendor file application.

Required documentation may include:

Expense Type	Required Documentation
Rent	Space Cost Allocation Form and Lease Agreement
Consultants	Consultant Agreement
Subcontractors	Subcontractor Agreement
Incentives/Stipends	Stipend Justification

Additional documentation may be requested based on the proposed budget.

Step 6: Submit Your Budget

Before submitting, verify the following:

- The **FY Budgeted Amount** matches the **Total Budgeted Amount**.
- All required supporting documents have been uploaded.
- The **Amount Still Unallocated** equals **\$0.00**.

Once confirmed, select **Submit to Agency**.

Note

DYCD may return your budget for revisions if additional information or corrections are needed. Invoice submission will not be available until the budget has been fully approved.

Invoice Guidance

For detailed information regarding invoicing requirements and procedures, please review the **DYCD Fiscal Manual for PASSPort Users**.

Please refer to **Pages 63–68** for invoice guidance.

Reminder: Your POCR must be approved before you can create and submit invoices using the active Purchase Order number.

For budget-related questions, please contact your Program Manager or DYCD Budget and Finance staff.

Additional Resources

1. [Create and Modify Budgets | MOCS](#)
2. [How to Submit a POCR - YouTube](#)
3. [PassPort Financials Training](#)
4. [PassPort Financials - FAQ](#)
5. [Mayors Office of Contract Services \(MOCS\) Service Desk](#)