Checklist for Vendor Admins: Manage Your Organization’s PASSPort Account

Use the checklist to keep your organization’s information up to date.

Vendor Admin Responsibilities

The person who requests a PASSPort account for an organization automatically becomes a first Vendor Admin. This role gives them **full administrative access** in PASSPort.

Vendor Admins are responsible for:

- **Making sure your account has at least two Vendor Admins** to share responsibilities and support uninterrupted account management.
- **Promptly updating the organization’s PASSPort account when changes occur:** Update your organization’s information, contacts, or certifications in PASSPort immediately to maintain accuracy and avoid delays.
- **Regularly reviewing and maintaining the Vendor Profile:** Ensure your organization’s information, including contacts, disclosures, commodity codes, and any relevant NYC business certifications and Prequalifications (PQL), is accurate and up to date.
- **Managing user access:** Add new users, remove users who no longer need access, and assign the appropriate roles to each contact. Vendor Admins control who can do what in PASSPort.
- **Staying informed and sharing updates:** Vendor Admins receive all automated PASSPort email notifications and the MOCS Contracting News (MOCS’ monthly e-Newsletter for vendors). It’s important to keep your team in the loop—share updates about contracting opportunities, upcoming deadlines, and any actions needed in PASSPort.

Why Account Maintenance is Crucial

Keeping your organization’s PASSPort account up to date isn’t just a formality—it’s essential to staying visible and competitive in the City’s procurement process.

When your Vendor Profile is current, City Agencies can:

- Learn about your organization and its capabilities.
- Understand the goods or services you offer.
- Invite you to participate in relevant contracting opportunities.
- Process contract-related actions smoothly and without delays.

Why it matters: Outdated or missing information can prevent your organization from being considered for opportunities or cause delays in contracting.

Important: Make it a priority to review and update your PASSPort Vendor Profile **promptly** whenever there are changes to your business information, contacts, or documents. Regular account maintenance helps ensure that your organization stays eligible and responsive in a competitive procurement environment.

Checklist: PASSPort Account Maintenance

Use this checklist to ensure you review and update all important information.

Best Practice: Make updates immediately when changes arise and make it a habit to review your PASSPort disclosures on a regular basis, at least every six months.

☐ Is Your Organization's Basic Information Up to Date?

- On the PASSPort homepage, click the **Vendor Information** tile.
- Review and update **Basic Information** details, including business information, mailing address, website URL, and social media accounts.
- **Note:** If you need to update your organization's **legal name** or banking information, contact the Payee Information Portal (PIP) Call Center for assistance. These updates cannot be made directly in PASSPort. Once PIP processes the update, the new legal name will display in PASSPort within 8-10 business days.

☐ Are Your Contacts Complete and User Roles Accurate?

- On the PASSPort homepage, click the **Vendor Contacts** tile.
- Review all contacts listed in the **Contacts** tab to ensure the contact list is complete and everyone is assigned the correct user role(s). Update as needed.
  - **Remove** former employees by deleting the contact. To **remove** access, either remove the role(s) or delete the contact.
  - **Add** new colleagues and assign roles as needed – here's how.
- Important Contact Management Reminders and Best Practices:
  - Assign **at least two** individuals the Vendor Admin role to split the administrative work and ensure continuity.
  - If your Vendor Admin has left the organization and you're unable to access your account, please contact the MOCS Service Desk for assistance.
  - To be able to log in to PASSPort, every contact must be assigned at **least one role** and have created a username and password by registering a **NYC.ID**.
  - A Vendor Admin must assign the following roles to at least one contact (which can be themselves): **Signatory**, **Vendor Contract Signatory**, and **Procurement L2.**
  - Only four roles are needed to perform all tasks in PASSPort (Vendor Admin, Signatory, and Vendor Contract Signatory, and Procurement L2), adding vendor contacts with **task-specific roles** is recommended.
  - While contacts can be assigned **multiple roles**, follow the principle of **least authorizations** so that users only have the permissions needed to complete their job. This helps to reduce inadvertent errors.

    ○ To learn how to add contacts, understand the available roles, and assign user roles effectively, refer to this guide: **Add Users and Assign Roles**.

☐ Is Your Organization Filed?

- On the PASSPort homepage, ensure the **Vendor Record Status** displays: **Filed**.
- **Filed** means that your organization has successfully enrolled in PASSPort, allowing City Agencies to view your organization's information and disclosures, and initiate contract actions.
- If the status is **Draft** or **Ready to Submit**, **complete the Vendor Enrollment** to get Filed**.**

☐ Are Your Organization's Disclosures Up to Date?

- On the PASSPort homepage, click the **Disclosures** tile.
- Review the **Vendor Questionnaire** details for accuracy.
- Check with your Principal Owners/Officers to review whether any information has changed in their **Principal Questionnaires**.
- If updates are needed, submit a **Change Request**.

☐ Are the Principal Owners/Officers Correct?

- If leadership has changed, update both the **Contacts** and **Disclosures** tabs.
- Submit a **Change Request** to update Disclosures (Vendor and Principal Questionnaires)**.**

☐ Is the Ownership Information Correct?

- If ownership has changed, submit a **Change Request** to update Parent and Controlling Entities listed in the Disclosures tab.

☐ Are There Any Pending Change Requests?

- Change Requests can be submitted to make updates to the disclosures of a **Filed** account.
- A pending Change Request (which is either in **Draft** or **Ready to Submit** status) can delay contracting actions. Submit the Change Request, or if the account and disclosures are accurate you can cancel the Change Request. The Vendor's account status must be Filed for contract awards to be processed and registered!
- To complete a pending Change Request, click the **Vendor Information** tile on the PASSPort homepage. In the Vendor Profile, click the **Change Log** tab. Click the **Check Progress** button. Have a Signatory apply an e-Signature and click **Submit Change Request**.
- For instructions, refer to this guide: **Submit a Change Request**.

☐ Are Your Commodity Codes Accurate?

- On the PASSPort homepage, click the **Commodity Enrollment** tile.
- To learn more about Commodity Codes and how to update existing enrollments to accurately reflect the goods/services your organization provides, refer to this guide: **Enroll in Commodities in PASSPort.**

☐ Did You Disclose Any NYC Business Certifications?

- Disclosing your organization's business certifications can expand access to contracting opportunities, especially those designated for NYC M/WBE-certified businesses.
- On the PASSPort homepage, click the **Vendor Information** tile.
- Review any NYC business certifications your organization disclosed in the **Vendor M/WBE Certification** section (if applicable). Ensure your certifications have not expired.
- Add any NYC business certifications that have not yet been disclosed – here's how.
- For more information about **NYC Business Certifications** administered by the Department of Small Business Services (SBS), click here.
- If you have questions about your NYC business certifications or need to update your **NYC Online Directory** profile, contact SBS.

☐ For Human/Client Service Providers: Is Your HHS Prequalification Application In Approved Status (not Expired)?

- Providers must have an **Approved** HHS Prequalification Application to respond to human/client service solicitations released in PASSPort.
- The HHS Prequalification Application is **valid** until the end date of any required document's validity period or for three years. If any required document becomes outdated, your prequalification status will expire. Most providers' prequalification expires on an annual basis due to annual filing requirements.
- How to check your Prequalification status and confirm it's still in **Approved** status: Go to **RFx** > **Browse Prequalified Lists**. In the Keywords field, enter "HHS", then click **Search**. The Prequalification will display, and you can view your organization's status in the **Current Status** column. The status must read **Approved**.
- If the Prequalification Application is **Expired,** locate the PQL (RFx > Browse Prequalified Lists > enter "HHS" in the Keywords field, then click the Search button) and click the **Update Application** button. Upload any updated documents for MOCS Review, then click **Submit for Review**. Note: If your Expired Application was **Returned** (see Application Activity column), however, simply make the necessary changes and click **Submit for Review**. Once approved by MOCS, your status will return to Approved.
- For more information, refer to these guides: **Submit the HHS Accelerator Prequalification Application** and **HHS Prequalification Revisions: Resubmit the Financial Document**.

☐ **For Nonprofit Organizations Receiving City Council Discretionary Funding: Is Your Discretionary Prequalification In Approved Status (not Expired)?**

- Nonprofits may use either an Approved HHS Accelerator Prequalification Application or an **Approved** Discretionary Prequalification Application to meet the procedural requirements to clear City Council Discretionary Awards. If a nonprofit does **not** plan to respond to human/client service solicitations released in PASSPort, but does receive City Council Discretionary Awards, make sure your Discretionary Prequalification Application is Approved.
- The Discretionary Prequalification Application is **valid** until the end date of any required document's validity period or for three years. If any required document becomes outdated, your prequalification status will expire.
- How to check your Prequalification status and confirm it's still in **Approved** status: Go to **RFx** > **Browse Prequalified Lists**. In the Keywords field, enter "Discretionary", then click **Search**. The Prequalification will display, and you can view your organization's status in the **Current Status** column. The status must read **Approved**.
- If the Prequalification Application is **Expired**, click **Update Application,** and upload any updated documents for MOCS Review, and submit. Note: If your Expired Application was **Returned** (see Application Activity column), however, simply make the necessary changes and click **Submit for Review**. Once approved by MOCS, your status will return to Approved.
- For more information, refer to this guide: **Submit the Discretionary Prequalification Application.**

What Type of Prequalification Does My Organization Need?

To respond to health or client service solicitations in PASSPort, your organization must have an approved **HHS Prequalification Application**.

To meet the procedural requirements for City Council Discretionary Awards, your organization must have **either** an approved **HHS Prequalification Application** or an approved **Discretionary Prequalification Application**.

In other words:

- If your organization receives discretionary funding **and** plans to compete for City contracts, **only the HHS Prequalification** is required.

- If your organization is **not** interested in competing for City contracts and only receives discretionary funds, the **Discretionary Prequalification** is sufficient—it's quicker and easier to complete and saves you time!