

## Adding Vendor Users and Assigning Roles

Vendors may have multiple PASSPort users with different levels of access. This document is a quick vendor reference guide for Vendor Admins on how to add contacts and assign roles. Need help? Please contact the **MOCS Service Desk**.

### Adding a Vendor User

Only the **Vendor Admin** role can add a PASSPort user to an organization's account.

The **Vendor Admin** must first add the designated individual as a new contact in the Contacts tab:

- From any page in PASSPort, click the **“Profile”** tab at the top of the page.
- Select **“Vendor Profile”** from the drop-down menu.
- Navigate to the **Contacts** tab.
- Click the **“Add a Contact”** button.
- Enter the First name, Last name, and Email, then click **“Save and Close.”**

Each new contact must have a unique email address and then be assigned at least one system user role. In order to complete this step, the newly added contact needs to create login credentials by registering an NYC ID using the **same** email address that was entered by the Vendor Admin when adding the new contact. To create a NYC.ID, click [here](#).

### Assigning Role(s) to a Vendor User

Once a vendor contact has been added, the **Vendor Admin** must assign **at least one vendor user role** to that newly added contact. Each user must have at least one role associated with their contact information to be able to log in to PASSPort, and they may have multiple roles.

- From any page in PASSPort, click the **“Profile”** tab at the top of the page.
- Select **“Vendor Profile”** from the drop-down menu.
- Navigate to the **Contacts** tab.
- Next to the name and email address of the Vendor Contact you are assigning roles to, click the **“Roles”** drop-down menu.
- Click the role you would like to assign. Repeat for each role you are adding.
- Click **“Save.”** The role(s) show underneath the drop-down menu when successfully added.

*Ready to start working on a response to an RFX? Review the **RFX Vendor Response Authorizations Job Aid** for information on user authorization functionalities. Contract completion tasks and affiliated roles information are available on next page.*



The individual who submitted the PASSPort account request is automatically assigned a **Vendor Admin** role and can add new contacts and assign vendor user roles. For an organization to complete all actions in PASSPort, a Vendor Admin must assign **Signatory** and **Contract Signatory** roles to at least one contact (which can be themselves). Vendor Admins may either add contacts and assign roles in the Contacts tab of the Vendor Profile or for RFX only, assign existing contacts directly to a vendor response team through the **RFX Setup Team** tab. For **Contracts**, the Vendor Admin(s) and L2 Procurement role(s) will automatically be added to the **Setup Teams**. MOCS recommends that the original Vendor Admin assign at least one other contact the Vendor Admin role to prevent account access issues.

## Task Authorizations by User Role\*

For a Vendor Admin to effectively assign a user role, the Vendor Admin must determine what tasks the user will be performing and whether that user should be assigned one or more global roles (e.g. a Signatory role or Contributor role) or a local, response-based role to support a specific RFX response submission or specific contract by being added to a vendor response team. The following table provides an overview of the current task authorizations by user role.

Task Authorizations by Role		Vendor Admin	Contributor	Signatory	Procurement		Financials		Contributor added to Vendor Response Team	Vendor Contract Signatory
					Level 1 (L1)	Level 2 (L2)**	Level 1 (L1)	Level 2 (L2)		
PASSPort Enrollment	Enter Information	x	x	x						
	Click "Check Progress"	x								
	Sign Enrollment Package			x						
	Submit Enrollment Package	x		x						
Account Management	Add/edit Contacts and Roles	x								
	Initiate Change Request	x	x	x						
	Sign Change Request/CNC			x						
RFX Response Submission	Enter Information	x			x	x	x	x	x	x
	Submit/Cancel Response	x			x	x	x	x	x	x
	Can add/edit contacts to RFX Team in RFX/Setup Team tab	x			x	x				
Contract Completion	Setup Team	x				x				
	Upload Vendor Documents	x				x				
	Add Site Information	x				x				
	Complete LL34 Compliance Tab	x				x				
	Review Contract Agreement	x				x				x
	DocuSign Contract									x

\*\*Human Services Providers: Only contacts with a Vendor Admin or Procurement L2 user role can submit an HHS PQL Application.

\*The complete list of roles can be seen in the "Role" drop-down menu on the Contacts tab.

### Best Practices for Vendor Admins when Assigning Roles:

- To prevent account access issues, at least two individuals should have the Vendor Admin role.
- Follow the principle of least authorizations so that users only have the permissions needed to complete their job. This helps to reduce inadvertent errors.
- Every contact needs to be assigned at least one role to be able to log in to a PASSPort account. Each contact, including yourself, can be assigned multiple roles. To remove access, simply remove the role(s) or delete the contact altogether.
- A Vendor Admin must assign one or more contacts, which can be themselves, to the Signatory and Contract Signatory roles. Before a contact is assigned the Contract Signatory role, that contact should log into PASSPort at least once. While only three roles are needed to perform all tasks in PASSPort (Vendor Admin, Signatory and Contract Signatory), adding vendor response team members with task-specific roles are encouraged.
- Confirm Vendor Admin role or Procurement Level 2 role is assigned to at least one individual with authorization to complete LL34 Compliance tab.
- For RFX response, adding users to vendor response team will enable them to perform *all* activities for a *specific* RFX response. Refer to RFX Response Authorizations job aid for details.
- [Adding a Contact to your PASSPort Account](#) video tutorial is an additional, helpful material.