



Provider Guide to Account Administration

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Introduction

Managing your organization's account is important to ensure that:

- Users have access to the system.
- All of your organization's information is accurate and up to date.
- Your organization's profile accurately presents your organization to City Agencies, Foundations and potential partners.

This guide is for Account Administrators, it gives instructions on how to add and maintain users and keep your organization's account up to date.

The first step for all users to gain access to the HHS Accelerator System is to establish a NYC.ID. See "HHS Accelerator: Account Creation and Access" for information on how a user can establish a NYC.ID and apply for a user account in the system.

Managing Members and System Users of your Organization

Assigning Roles to System Users

Your organization needs to make some critical decisions regarding who will access the HHS Accelerator System and what role each user will play. Please consider the most appropriate individual(s) to:

- Manage your organization's relationships with the City and other funders
- Maintain your organization's profile
- Sign contracts on behalf of your organization
- Submit budgets and invoices on behalf of your organization.

HHS Accelerator System access is divided into four roles: Read-only access, Financials access, Procurements access, and Procurements/Financials access. Within the role you assign to a user, you must also assign a level. There are two levels, "Level 1" (L1) and "Level 2" (L2). Level 1 users have restricted, basic permissions in their assigned role and Level 2 users have unrestricted permissions in their assigned role. The Read-only role does not have access to perform tasks in the system.

IMPORTANT: HHS RFPs are now released in PASSPort and the HHS Prequalification Application including related documents are also submitted in PASSPort. However, the historical Procurement and Application data remains available for your organization to view in HHS Accelerator with the relevant Procurement roles.

- **Read-only Access**
 - Read-only permissions to the entire system.
- **Financials Access**
 - **Level One**
 - Read-only Permissions to the Procurement tab
 - Basic Permissions in the Financials, Documents Vault and Applications tabs.
 - **Level Two**

- Read-only Permissions to the Procurement tab
 - Full Permissions in the Financials, Documents Vault and Applications tabs.
- **Procurements Access**
 - **Level One**
 - Read-only Permissions to the Financials tab
 - Basic Permissions in the Procurements, Document Vault and Applications tabs.
 - **Level Two**
 - Read-only Permissions to the Financials tab
 - Full Permissions in the Procurements, Document Vault and Applications tabs.
 - **Financials and Procurements Access**
 - **Level One**
 - Basic Permissions in the Financials, Procurements, Document Vault and Applications tabs.
 - **Level Two**
 - Full Permissions to the entire System.

System User Access Table

System roles and common organizational levels for these roles are outlined in the table below.

****Access to view historical information only.***

Role	Tasks	L1 User	L2 User
Read-only	None	N/A	N/A
Procurements	*Begin Business Application	X	X
	*Submit Business Application		X
	*Select Services	X	X
	*Submit Service Applications		X
	*Begin Proposal	X	X
	*Submit Proposal		X
	*View Evaluation Scores		X
	*Retract Proposal		X
	*Cancel Proposal		X
	*Show Proposal Comments	X	X
	Upload Documents	X	X
	Share Documents		X
	*Begin Business Application	X	X

Financials	*Submit Business Application		X
	*Select Services	X	X
	*Submit Service Applications		X
	View Budget	X	X
	Modify Budget	X	X
	Request Advance		X
	Cancel Modification		X
	Submit Invoice		X
	Delete/Withdraw Invoice		X
	View Invoice	X	X
	Upload Documents	X	X
	Share Documents		X

** There is also the Level 1 Procurement/Financial Users role and the Level 2 Procurement/Financial Users role.

Account Administrator Role

The individual who submits the initial request for your organization's HHS Accelerator Account is typically your Account Administrator. S/he is automatically granted access to all system privileges and becomes a L2 user. Account Administrators have the ability to grant other users access to the system. For this reason, we strongly recommend selecting at least **two** Account Administrators to share the responsibility of managing your organization's user access and privileges.



Your Account Administrators are easily identifiable with an * (asterisk) to the left of their Name in the Members & Users table of the Organization Information module.

Handling Requests to Join your Organization

User access to the system begins with members of your organization taking action outside of the system. Members of your organization must create their own NYC.ID and request access to your organization's account (steps covered in the *Account Creation and Access*. Once a member of your organization has registered in the system and requested membership, you are responsible for reviewing and as appropriate, approving the request:

The screenshot shows the NYC HHS Accelerator web application. At the top, there is a navigation bar with the NYC HHS Accelerator logo and several tabs: Organization Information, Document Vault, Applications, Procurements, and Financials. A callout '1' points to the 'Organization Information' tab. Below the navigation bar, the 'Organization Information' section is active, showing sub-tabs: Basics, Geography, Languages, Population, and Members & Users. A callout '2' points to the 'Members & Users' tab. The 'Members & Users' section contains a table of organization members. A callout '3' points to the 'Review Request' link in the 'Actions' column for the member Lauren Sacca.

Name	Office Title	Email Address	System User	Member Status	Actions
Barry Brown	Board Chair / President	trnprov3amgr@mailinator.com	No	Active	Edit Profile
*Ilana Smith	Executive	trnprov3emgr@mailinator.com	Yes	Active	Edit Profile
*Jennifer Smith	Executive	trnprov3cmgr@mailinator.com	Yes	Active	Edit Profile
Lauren Sacca		laurensacca@mailinator.com	Pending	Pending	Review Request
*Misato Smith	Staff	trnprov3bmgr@mailinator.com	Yes	Active	Edit Profile
Misato Tomato	Staff	misatotomato@mailinator.com	Yes	Active	Edit Profile
Molly Stewart		molly.stewart@mailinator.com	Pending	Pending	Review Request

1. Click the **“Organization Information”** button.
2. Click the **“Members & Users”** tab.
3. Click the **“Review Request”** link.

Verify that this person is an individual you want to add as a user.

4. Assign the user a type of account and level.
5. Will the user be an Account Administrator? Click “Yes” or “No” as appropriate.
6. Click the “Check for Existing Profile” button.

Organization Information
Basics
Geography
Languages
Population
Members & Users

New User Request: Lauren Sacca

A new user has requested access to the HHS-Accelerator system.

- To approve this request, please select a user role and permissions, fill out the member information or link to an existing organization member profile and click the “Approve” button.
- To deny this request, please scroll to the bottom of the page and click the “Deny” button.

* Indicates required fields

NYC.ID User Information

First Name	Lauren
Middle Initial	
Last Name	Sacca
NYC.ID/Email Address	laurensacca@mailinator.com

HHS Accelerator System Permissions

* Choose one type of account to assign to this user:

Read-Only

☐ Read-Only
(Read-Only permissions to the entire system)

Financials

☐ Level One
(Basic Permissions in the Financials, Document Vault and Applications tab, Read-Only Permissions to the Procurement tab)

☒ Level Two
(Basic Permissions PLUS Application, Budget Submission/e-signature, Invoice Submission and Document Sharing Permissions, Read-Only Permissions to the Procurement tab)

Procurements

☐ Level One
(Basic Permissions in the Procurements, Document Vault and Applications tab, Read-Only Permissions to the Financials tab)

☐ Level Two
(Basic Permissions PLUS Application, Proposal Submission/e-signature and Document Sharing Permissions, Read-Only Permissions to the Financials tab)

Financials and Procurements

☐ Level One
(Basic Permissions in the Financials, Procurements, Document Vault and Applications tab)

☐ Level Two
(Basic Permissions PLUS Application, Proposal and Budget Submission/e-signature, Invoice Submission and Document Sharing Permissions)

* Would you like to assign this user the same permissions you have as an Account Administrator?:

☐ Yes, this user can also approve account requests and assign user roles.

☒ No

Check for Existing Profile

Deny
Approve

Link to Existing Organization Member Profile

Below is a list of your organization's members that have profile information in HHS Accelerator, but do not have user accounts. Select from the list who the new user should be linked to and click the "Link" button

Name	Office Title	Email Address
<input type="radio"/> Barry Brown	Board Chair / President	trnprov3amgr@mailinator.com
<input type="radio"/> Ryan Smith	Executive Director / Chief Executive Officer (or equivalent)	trnprov3amgr@mailinator.com

Profile not found

Link to Existing Profile

7. If the correct profile appears, click **“Link to Existing Profile.”** If not, click **“Profile not found.”**

Organization Information

Basics

Geography

Languages

Population

Members & Users

New User Request: Lauren Sacca

A new user has requested access to the HHS-Accelerator system.

- To approve this request, please select a user role and permissions, fill out the member information or link to an existing organization member profile and click the "Approve" button.
- To deny this request, please scroll to the bottom of the page and click the "Deny" button.

* Indicates required fields

NYC.ID User Information

First Name

Lauren

Middle Initial

Last Name

Sacca

NYC.ID/Email Address

laurensacca@mailinator.com

HHS Accelerator System Permissions

* Choose one type of account to assign to this user:

Read-Only

☐ Read-Only
(Read-Only permissions to the entire system)

Financials

☐ Level One
(Basic Permissions in the Financials, Document Vault and Applications tab, Read-Only Permissions to the Procurement tab)

☒ Level Two
(Basic Permissions PLUS Application, Budget Submission/e-signature, Invoice Submission and Document Sharing Permissions, Read-Only Permissions to the Procurement tab)

Procurements

☐ Level One
(Basic Permissions in the Procurements, Document Vault and Applications tab, Read-Only Permissions to the Financials tab)

☐ Level Two
(Basic Permissions PLUS Application, Proposal Submission/e-signature and Document Sharing Permissions, Read-Only Permissions to the Financials tab)

Financials and Procurements

☐ Level One
(Basic Permissions in the Financials, Procurements, Document Vault and Applications tab)

☐ Level Two
(Basic Permissions PLUS Application, Proposal and Budget Submission/e-signature, Invoice Submission and Document Sharing Permissions)

* Would you like to assign this user the same permissions you have as an Account Administrator?:

☐ Yes, this user can also approve account requests and assign user roles.

☒ No

Check for Existing Profile

Member Information

Office Title

--- Select one ---

Office Phone Number

Deny

Approve

8. Choose an **“Office Title.”**

9. Click **“Approve.”**

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Organization Information

Basics

Geography

Languages

Population

Members & Users

Members & Users

?

Manage information about your organization's staff member and account users.

+ Add Member

Name	Office Title	Email Address	System User	Member Status	Actions
*Ilana Smith	Executive	trnprov3emgr@mailinator.com	Yes	Active	Edit Profile
*Jennifer Smith	Executive	trnprov3cmgr@mailinator.com	Yes	Active	Edit Profile
Lauren Sacca	Staff	laurensacca@mailinator.com	Yes	Active	Edit Profile
*Misato Smith	Staff	trnprov3bmgr@mailinator.com	Yes	Active	Edit Profile
Misato Tomato	Staff	misatotomato@mailinator.com	No	Active	Edit Profile
Molly Stewart	Staff	molly.stewart@mailinator.com	No	Active	Edit Profile

The pending user will now appear as a System User ("Yes") and may access your organization's account.

Circumstances may also arise that require you to take system access away. Anyone whose information has been added to the system during account set up or in response to the HHS Accelerator Applications is considered a member of your organization. You may need to remove members that have left your organization or those who no longer require system access. There are two ways to remove users. You can:

- Remove members; or
- Deactivate system users.

We recommend that you remove and deactivate members and users that leave your organization.

Removing Members from your Organization

To remove members from the organization (non-system users):

1. Click the "Organization Information" tab.

2. Click the "Members & Users" tab.

3. Click "Edit Profile."

Name	Office Title	Email Address	System User	Member Status	Actions
Barry Brown	Board Chair / President	trnprov3amgr@mailinator.co	No	Active	Edit Profile
*Iana Smith	Executive	trnprov3emgr@mailinator.co	Yes	Active	Edit Profile
*Jennifer Smith	Executive	trnprov3cmgr@mailinator.co	Yes	Active	Edit Profile
Lauren Sacca		laurensacca@mailinator.com	Pending	Pending	Review Request
*Misato Smith	Staff	trnprov3bmgr@mailinator.co	Yes	Active	Edit Profile
Misato Tomato	Staff	misatotomato@mailinator.co	Yes	Active	Edit Profile
Molly Stewart		molly.stewart@mailinator.co	Pending	Pending	Review Request

1. Click the "Organization Information" tab.
2. Click the "Members & Users" tab.
3. Click "Edit Profile."

4. Click the check box to remove the member and input last day with the organization.

If you only want to remove access to the system, please check the Deactivate User box above.

5. Enter the individual's Last day with Organization.

6. Click "Save."

Remove from Organization?

Indicate if this person needs to be removed from the organization:
You may consider removing a member if they are no longer associated with your organization. If you only want to remove access to the system, please check the Deactivate User box above.

☒ Remove this member

* Last Day with Organization: (mm/dd/yyyy): 12/08/2016

Cancel Save

4. Click the check box to remove the member and input last day with the organization.
- If you only want to remove access to the system, please check the Deactivate User box above.*
5. Enter the individual's Last day with Organization.
6. Click "Save."

Organization Information

BasicsGeographyLanguagesPopulationMembers & Users

Members & Users

Manage information about your organization's staff member and account users.

+ Add Member

Name	Office Title	Email Address	System User	Member Status	Actions
*Ilana Smith	Executive	trnprov3emgr@mailinator.co m	Yes	Active	Edit Profile
*Jennifer Smith	Executive	trnprov3cmgr@mailinator.co m	Yes	Active	Edit Profile
Lauren Sacca		laurensacca@mailinator.com	Pending	Pending	Review Request
*Misato Smith	Staff	trnprov3bmgr@mailinator.co m	Yes	Active	Edit Profile
Misato Tomato	Staff	misatotomato@mailinator.co m	Yes	Active	Edit Profile
Molly Stewart	Staff	molly.stewart@mailinator.co m	No	Inactive	Edit Profile

The member will now appear as Inactive.

Please note that you cannot permanently delete a member and System user from this Members & Users table. You can only change the status to "Inactive."

Deactivating System Users from your Organization

To deactivate active system users from the organization:

Organization Information

Basics | Geography | Languages | Population | **Members & Users**

Members & Users

Manage information about your organization's staff member and account users.

[+ Add Member](#)

Name	Office Title	Email Address	System User	Member Status	Actions
Barry Brown	Board Chair / President	tmprov3amgr@mailinator.com	No	Active	Edit Profile
*Ilana Smith	Executive	tmprov3emgr@mailinator.com	Yes	Active	Edit Profile
*Jennifer Smith	Executive	tmprov3cmgr@mailinator.com	Yes	Active	Edit Profile
Lauren Sacca		laurensacca@mailinator.com	Pending	Pending	Review Request
*Misato Smith	Staff	tmprov3bmgr@mailinator.com	Yes	Active	Edit Profile
Misato Tomato	Staff	misatotomato@mailinator.com	Yes	Active	Edit Profile
Molly Stewart		molly.stewart@mailinator.com	Pending	Pending	Review Request

1. Click the **“Organization Information”** button.
2. Click the **“Members & Users”** tab.
3. Click the **“Edit Profile”** link.

Organization Information

Basics
Geography
Languages
Population
Members & Users

Edit Member Profile: Misato Tomato

Edit member information and system permissions.

* Indicates required fields

NYC.ID User Information

First Name	Misato
Middle Initial	
Last Name	Tomato
NYC.ID/Email Address	misatotomato@mailinator.com

HHS Accelerator System Permissions

* Choose one type of account to assign to this user:

Read-Only

(Read-Only permissions to the entire system)

Financials

Level One
(Basic Permissions in the Financials, Document Vault and Applications tab, Read-Only Permissions to the Procurement tab)

Level Two
(Basic Permissions PLUS Application, Budget Submission/e-signature, Invoice Submission and Document Sharing Permissions, Read-Only Permissions to the Procurement tab)

Procurements

Level One
(Basic Permissions in the Procurements, Document Vault and Applications tab, Read-Only Permissions to the Financials tab)

Level Two
(Basic Permissions PLUS Application, Proposal Submission/e-signature and Document Sharing Permissions, Read-Only Permissions to the Financials tab)

Financials and Procurements

Level One
(Basic Permissions in the Financials, Procurements, Document Vault and Applications tab)

Level Two
(Basic Permissions PLUS Application, Proposal and Budget Submission/e-signature, Invoice Submission and Document Sharing Permissions)

* Would you like to assign this user the same permissions you have as an Account Administrator?:

☐ Yes, this user can also approve account requests and assign user roles.
☒ No

Deactivate System User?

Indicate if this user should no longer have access to the system:

☒ Deactivate User

Member Information

* Office Title: Staff

Office Phone Number:

Remove from Organization?

Indicate if this person needs to be removed from the organization:
You may consider removing a member if they are no longer associated with your organization. If you only want to remove access to the system, please check the Deactivate User box above.

☐ Remove this member

Cancel Save

4. Click the check box to deactivate the user.

5. Click “Save.”

The “**System User**” column will change to “**No**” and the member will no longer have access to the system.

Organization Information

BasicsGeographyLanguagesPopulationMembers & Users

Members & Users

Manage information about your organization's staff member and account users.


+ Add Member

Name	Office Title	Email Address	System User	Member Status	Actions
*Ilana Smith	Executive	trnprov3emgr@mailinator.com	Yes	Active	Edit Profile
*Jennifer Smith	Executive	trnprov3cmgr@mailinator.com	Yes	Active	Edit Profile
Lauren Sacca		laurensacca@mailinator.com	Pending	Pending	Review Request
*Misato Smith	Staff	trnprov3bmgr@mailinator.com	Yes	Active	Edit Profile
Misato Tomato	Staff	misatotomato@mailinator.com	No	Active	Edit Profile
Molly Stewart	Staff	molly.stewart@mailinator.com	No	Inactive	Edit Profile

Managing Your Organization's Profile

Managing your organization's profile is a part of maintaining your relationship with the City. Your organization's profile is a part of your public identity visible to users with whom you share documents, so your profile should accurately reflect your organizational goals and capabilities.

An organization's profile information is maintained in the Organization Information section of the system. You can update information in any of the tabs (Basics, Geography, Languages, etc.) and save the changes by clicking “**Save**” at the bottom of the page.



Organization Information







Document Vault

Applications

Procurements

Financials

Text Size: A A

Welcome: Rena Papena, Training Provider 3

Organization Information

Basics

Geography

Languages

Population

Members & Users

Basics

Please fill out the form below as accurately as possible. This information will determine what documents you are required to upload.

* Indicates required fields

General Information

* Employer Identification Number/Tax Identification Number (EIN/TIN):

11-1111122

* Organization Legal Name:

Training Provider 3

[Update Legal Name](#)

* Corporate Structure:

Non Profit

Dun and Bradstreet Number (DUNS#)

* Accounting Period:

Jul * To Jun

[Update Accounting Period](#)

* Mission Statement:

To Strengthen Communities and Educate Children

104 characters left

Updating Your Organization's Legal Name

To update your organization's legal name:

1. Click the **“Organization Information”** button.
2. Click the **“Update Legal Name”** button.

3. Enter the new Legal Name of your organization as it appears on your Certificate of Incorporation (or equivalent).
4. Enter your reasons for updating your Organization Legal Name.
5. Click the **“Submit Request”** button.

An HHS Accelerator staff member will then review this information, and manually approve. The update will not be reflected in the system until it is approved.

Updating Your Accounting Period

Before you can update your organization's accounting period, please be sure that your filings are current, complete and loaded into the Document Vault prior to your request. If you do not have the proper forms filed, you will not be able to request an update. To request an update to your accounting period:

The screenshot shows the 'Organization Information' page in the NYC HHS Accelerator. The 'Basics' tab is active. The 'Update Accounting Period' button is highlighted with a red circle labeled '2'. The page includes fields for Employer Identification Number, Organization Legal Name, Corporate Structure, Dun and Bradstreet Number, Accounting Period, and Mission Statement.

1. Click the **“Organization Information”** button.
2. Click the **“Update Accounting Period”** button.

The screenshot shows the 'Update Accounting Period' dialog box. It contains a notice about updating the accounting period. The 'Current accounting period' is Jul To Jun. The 'New accounting period' is Month To Month. The 'Calendar year in which this change becomes effective' is 2014. The 'Update' button is highlighted with a red circle labeled '5'.

3. Enter the new accounting period.
4. Enter Calendar year the new period becomes effective.
5. Click the **“Update”** button.

Managing Multiple Accounts by a Single User

Requesting Access to Multiple Accounts

Users who manage accounts for multiple organizations are able to access each organization's account through a single NYC.ID. To request access to additional organization's accounts please contact the [MOCS Service Desk](#) and include your name, NYC.ID, current organization and organization you wish to request access to.

Navigating between Multiple Accounts

Users who are granted access to multiple accounts have the option to select which organization they would like to access after entering their login credentials.

The Official Website of the City of New York

NYC

Text Size

NYC
HHS Accelerator

HHS Accelerator provides centralized access to the City's Human Service funding opportunities and the ability to complete financial transactions. Please create a NYC.ID if you require access to HHS Accelerator.

Login

Log in using your NYC account. **1**

Email Address or Username: *

Password: *

Log In **2**

Log in using one of these options:

NYC Employees

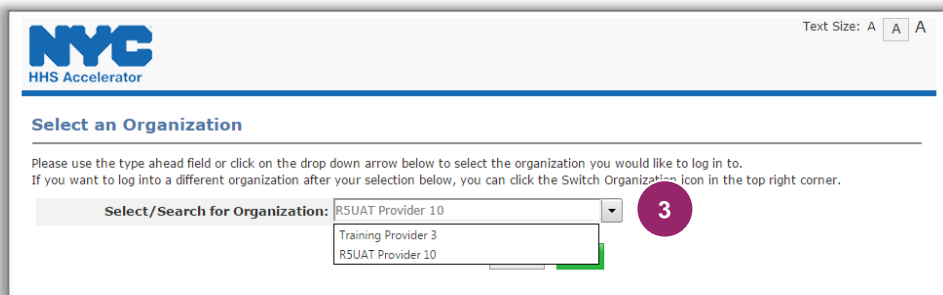
or

[Create Account](#)
[Forgot Password](#)
[Report an Issue](#)

1. Enter your **“NYC.ID”** and **“Password.”**

2. Click **“Login.”**

Your NYC.ID is the email address used in the initial account set up.



NYC
HHS Accelerator

Text Size: A A A

Select an Organization

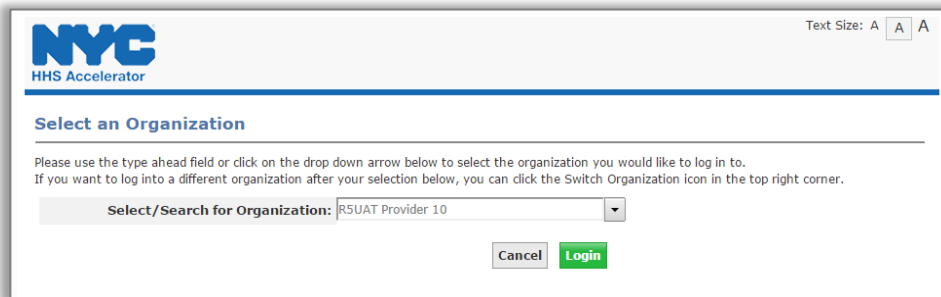
Please use the type ahead field or click on the drop down arrow below to select the organization you would like to log in to.
If you want to log into a different organization after your selection below, you can click the Switch Organization icon in the top right corner.

Select/Search for Organization: RSUAT Provider 10

Training Provider 3
RSUAT Provider 10

3. Select an organization from the **“Select/Search for Organization”** drop-down menu or start typing the name of the organization in the box.

If an organization does not appear in the drop down menu or when typed please contact the [MOCS Service Desk](#) to request access.



NYC
HHS Accelerator

Text Size: A A A

Select an Organization

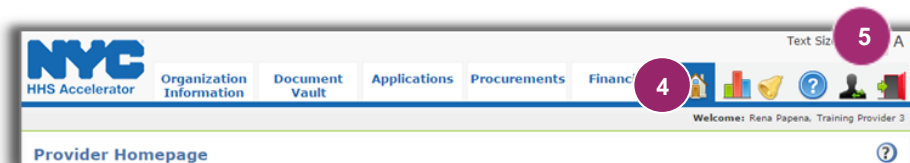
Please use the type ahead field or click on the drop down arrow below to select the organization you would like to log in to.
If you want to log into a different organization after your selection below, you can click the Switch Organization icon in the top right corner.

Select/Search for Organization: RSUAT Provider 10

Cancel Login

4. Click **“Login.”**

Once logged into the system, users can switch between organizations without completing logging out.



NYC
HHS Accelerator

Organization Information Document Vault Applications Procurements Finance

Text Size: A A A

Welcome: Rena Papena, Training Provider 3

Provider Homepage

5. To switch accounts click the **“Switch**

User”  icon.

Managing Contract Access

Any user with a Financials role (L1 or L2) who has Account Administrator privileges is able to restrict system users from accessing specific contracts in the Financials module. Restriction to a contract can be reversed only by someone in a Financials role with Account Administrator privileges.

Restricting System User Access to a Contract

NYC HHS Accelerator Organization Information Document Vault Applications Procurements **Financials**

Welcome: Mister Tiberius, Tempura

Provider Homepage

Application/Filings

HHS Prequalification is now hosted in PASSPort - it is streamlined and easier than ever to complete! If your organization wishes to begin the HHS Prequalification application process or has a pending prequalification application in HHS Accelerator, you must submit a new application in PASSPort. To complete an HHS Prequalification Application in PASSPort, you must have a PASSPort account. Click [here](#) to create a PASSPort account using your NYC.ID or to log into an existing PASSPort account. The **same** NYC.ID login credentials you use to access HHS Accelerator may be used to login or create an account in PASSPort.

Once logged into your PASSPort account, follow the instructions below to begin the HHS Prequalification Application process in PASSPort:

1. Navigate to the RFx tab on the top banner and select **Browse Prequalified Lists** from the dropdown.
2. Search for the HHS Accelerator Prequalification application and click on the **PQL label** to access the application.
3. Click the **Create New Application** button located at the top of the page, complete the questionnaire, and click **Submit for Review**.

Procurements

RFPs you're eligible for will be released within 30 days	RFPs with draft or submitted proposals
RFPs you're eligible for have due dates within 30 days	RFPs with proposals determined eligible for award

Financials

Budgets pending submission	Active Budgets
Budgets returned for revision	Budgets pending approval
Modifications and Updates pending submission	Modifications and Updates pending approval
Modifications and Updates returned for revision	Invoices pending approval
Invoices pending submission	Contracts pending registration
Invoices returned for revision	

1. Click the **"Financials"** module to get to the Contract List screen.

NYC HHS Accelerator Organization Information Document Vault Applications Procurements **Financials**

Welcome: Participant Twelve, Training Provider 1

Financials

Contract List

Listed below are the contracts for your organization. A default filter has been applied.

Filter Contracts ▼ Contracts: 201 Total Value of Active Contracts: \$502500000 1 2 3 4 5 > Next

Procurement/Contract Title	Agency	CT#	Contract Value(\$)	Last Updated	Status	Action
AGN - Finance DHS CT83	DHS	CT300000135	2,500,000.00	05/15/2014	Registered	I need to...
AGN - Finance DOP CT17	DOP	CT300000093	2,500,000.00	05/15/2014	Registered	I need to...
AGN - Finance ACS CT33	ACS	CT300000099	2,500,000.00	05/15/2014	Registered	View Amendments View Budget View Invoices User Access
AGN - Finance ACS CT34	ACS	CT300000100	2,500,000.00	05/15/2014	Registered	I need to...
AGN - Finance ACS CT35	ACS	CT300000101	2,500,000.00	05/15/2014	Registered	I need to...

2. Find the contract you intend to

restrict a user
from accessing.

3. Click the
“**Action**” drop-
down
corresponding to
that contract.

4. Select “**User
Access.**”

5. Click to select
the Financials
user you plan to
restrict from
accessing this
contract.

6. Click the single
arrow icon to
move the user to
the “**User
without
Access**” box.

*The double arrow icon
moves all Financials
users over to the
“User without Access”
selection box.*

7. Click “**Save**” to
confirm
restriction for the
selected user(s).

User Access

Assign Users

Use the add and remove buttons to set user restrictions for this contract. Users without access can see the record of this contract in the Contract List but are unable to view contract details or the details of related budgets, invoices, payments, and amendments. Additionally, specific document types related to these entities will be restricted in the Document Vault.

* **Procurement/Contract Title:** AGN - Finance DHS CT83

* **Agency:** DHS

* **CT#:** CT300000135

* **Contract Value:** 2,500,000.00

User with Access

- Misato Tomato-L2-misatotomato@mailir
- Participant Eight-L2-trnprov1fiscal8@m:
- Participant Eleven-L2-trnprov1fiscal11@**
- Participant Fifteen-L2-trnprov1fiscal15@
- Participant Five-L2-trnprov1fiscal5@mai
- Participant Four-L2-trnprov1fiscal4@ma
- Participant Fourteen-L2-trnprov1fiscal14
- Participant Nine-L2-trnprov1fiscal9@ma
- Participant Nineteen-L2-trnprov1fiscal15
- Participant One-L2-trnprov1fiscal1@mai

User without Access

Participant Eighteen-L2-trnprov1fiscal18@

Buttons: > >> << <

Bottom Buttons: Cancel Save

The screenshot shows the 'Financials' section of the NYC HHS Accelerator interface. A green message bar at the top of the 'Contract List' tab states: 'The contract user access has successfully changed.' Below this, a table lists contracts for the organization. The table has columns for Procurement/Contract Title, Agency, CT#, Contract Value(\$), Last Updated, Status, and Action. Five contracts are listed, all with a value of 2,500,000.00 and a status of 'Registered'.

Procurement/Contract Title	Agency	CT#	Contract Value(\$)	Last Updated	Status	Action
AGN - Finance DHS CT83	DHS	CT300000135	2,500,000.00	05/15/2014	Registered	I need to...
AGN - Finance DOP CT17	DOP	CT300000093	2,500,000.00	05/15/2014	Registered	I need to...
AGN - Finance ACS CT33	ACS	CT300000099	2,500,000.00	05/15/2014	Registered	I need to...
AGN - Finance ACS CT34	ACS	CT300000100	2,500,000.00	05/15/2014	Registered	I need to...
AGN - Finance ACS CT35	ACS	CT300000101	2,500,000.00	05/15/2014	Registered	I need to...

A green confirmation message will display confirming the change to User Access displays on the Contract List.



A user with restricted from a contract will have limited access to documents in the Document Vault.

A user restricted from a contract will have limited access to documents in the Document Vault. The user will not be able to open a file if it is linked to the restricted contract and categorized as one of the Document Types below. However, if the document is linked both to the restricted contract and to a contract for which the user has full access, the user will be able to open the file from the Document Vault.

- Document Types that can be restricted from users:
 - Administrative Overhead Documentation
 - Banking Documentation
 - Consultant Agreement
 - Cost Allocation Plan
 - Debt Service Documentation
 - Direct Deposit/Electronic Funds Transfer (EFT) Vendor Payment Enrollment Form
 - Financial Disclosure Forms
 - Fringe Benefits Justification
 - Indirect Rate Justification
 - Paystubs
 - Program Income Documentation
 - Real Estate Tax Documentation
 - Recoupment Justification Documentation
 - Subcontractor Agreement

Return System User Access to a Contract

NYC HHS Accelerator Organization Information Document Vault Applications Procurements **Financials**

Welcome: Mister Tiberius, Tempura

Provider Homepage

Application/Filings

HHS Prequalification is now hosted in PASSPort - it is streamlined and easier than ever to complete! If your organization wishes to begin the HHS Prequalification application process or has a pending prequalification application in HHS Accelerator, you must submit a new application in PASSPort. To complete an HHS Prequalification Application in PASSPort, you must have a PASSPort account. Click [here](#) to create a PASSPort account using your NYC.ID or to log into an existing PASSPort account. The **same** NYC.ID login credentials you use to access HHS Accelerator may be used to login or create an account in PASSPort.

Once logged into your PASSPort account, follow the instructions below to begin the HHS Prequalification Application process in PASSPort:

1. Navigate to the RFx tab on the top banner and select **Browse Prequalified Lists** from the dropdown.
2. Search for the HHS Accelerator Prequalification application and click on the **PQL** label to access the application.
3. Click the **Create New Application** button located at the top of the page, complete the questionnaire, and click **Submit for Review**.

Procurements

RFPs you're eligible for will be released within 30 days	RFPs with draft or submitted proposals
RFPs you're eligible for have due dates within 30 days	RFPs with proposals determined eligible for award

Financials

Budgets pending submission	Active Budgets
Budgets returned for revision	Budgets pending approval
Modifications and Updates pending submission	Modifications and Updates pending approval
Modifications and Updates returned for revision	Invoices pending approval
Invoices pending submission	Contracts pending registration
Invoices returned for revision	

Documents Shared with your Organization

Organizations have shared 1 or more documents with you. Select an organization below and press "Continue" to view those documents.

- Select an Organization -

NYC.ID Account Management

0 User account requests requiring action

[Update Your NYC.ID Profile](#)

NYC.ID takes several minutes to synchronize with HHS Accelerator. The next time you log in, your NYC.ID profile will be updated.

1. Click the **"Financials"** tab to get to the Contract List screen.

NYC HHS Accelerator Organization Information Document Vault Applications Procurements **Financials**

Welcome: Participant Twelve, Training Provider 1

Financials

Contract List Budget List Invoice List Payment List Amendment List

Listed below are the contracts for your organization. A default filter has been applied.

Filter Contracts ▾ Contracts: 201
Total Value of Active Contracts: \$502500000

1 2 3 4 5 > Next

Procurement/Contract Title	Agency	CT#	Contract Value(\$)	Last Updated	Status	Action
AGN - Finance DHS CT83	DHS	CT300000135	2,500,000.00	05/15/2014	Registered	I need to...
AGN - Finance DOP CT17	DOP	CT300000093	2,500,000.00	05/15/2014	Registered	I need to...
AGN - Finance ACS CT33	ACS	CT300000099	2,500,000.00	05/15/2014	Registered	I need to...
AGN - Finance ACS CT34	ACS	CT300000100	2,500,000.00	05/15/2014	Registered	I need to...
AGN - Finance ACS CT35	ACS	CT300000101	2,500,000.00	05/15/2014	Registered	I need to...

2. Find the contract for which you intend to edit user access.
3. Click the **"Action"** drop-down corresponding to that contract.
4. Select **"User Access."**

User Access

Assign Users

Use the add and remove buttons to set user restrictions for this contract. Users without access can see the record of this contract in the Contract List but are unable to view contract details or the details of related budgets, invoices, payments, and amendments. Additionally, specific document types related to these entities will be restricted in the Document Vault.

* **Procurement/Contract Title:** AGN - Finance DHS CT83

* **Agency:** DHS

* **CT#:** CT300000135

* **Contract Value:** 2,500,000.00

User **with** Access

- Misato Tomato-L2-misatotomato@mailr
- Participant Eight-L2-trnprov1fiscal8@m
- Participant Five-L2-trnprov1fiscal5@mai
- Participant Four-L2-trnprov1fiscal4@ma
- Participant Fourteen-L2-trnprov1fiscal14
- Participant Nine-L2-trnprov1fiscal9@ma
- Participant Nineteen-L2-trnprov1fiscal19
- Participant One-L2-trnprov1fiscal1@mai
- Participant Seven-L2-trnprov1fiscal7@r
- Participant Seventeen-L2-trnprov1fiscal

>

>>

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User **without** Access

- Participant Eighteen-L2-trnprov1fiscal18@
- Participant Fifteen-L2-trnprov1fiscal15@m

6 5 7

Cancel Save

5. Click to select the restricted Financials user to whom you are returning access from the “**User without Access**” box.

6. Click the single arrow icon to move the user back to the “**User with Access**” box.

The double arrow icon moves all Financials users over.

7. Click “**Save**” to confirm the access change for the selected user(s).

NYC
HHS Accelerator

Organization Information Document Vault Applications Procurements **Financials**

Welcome: Participant Twelve, Training Provider 1

Financials

Contract List Budget List Invoice List Payment List Amendment List

Contract List

✓ The contract user access has successfully changed.

Listed below are the contracts for your organization. A default filter has been applied.

Filter Contracts Contracts: 201 Total Value of Active Contracts: \$502500000 1 2 3 4 5 > Next

Procurement/Contract Title	Agency	CT#	Contract Value(\$)	Last Updated	Status	Action
AGN - Finance DHS CT83	DHS	CT300000135	2,500,000.00	05/15/2014	Registered	I need to...
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AGN - Finance ACS CT33	ACS	CT300000099	2,500,000.00	05/15/2014	Registered	I need to...
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AGN - Finance ACS CT35	ACS	CT300000101	2,500,000.00	05/15/2014	Registered	I need to...

A green confirmation message will display confirming the change to User Access displays on the Contract List.