

## City Council Discretionary Award Contracting Provider Tips for Contracting Success


This guide offers helpful information for completing tasks in PASSPort. It is organized based on the key steps a provider will take during the PASSPort contracting process. For more information, please consult resources on [Learning To Use PASSPort webpage](#), including the webinar on [Completing the Vendor Document Submission Task in PASSPort for City Council Discretionary Contracts](#).

Questions? Contact the Mayor's Office of Contract Services.

### Setting up a Contract Team

Provider should confirm its discretionary contracting team.


- Setup Team is located on the left blue bar.
- The default team consists of organization's contacts that were previously added by your Vendor Admin during account setup.
- Provider may remove contacts by clicking the corresponding "x" button.
- Click **Add Contact** to add existing users in the system, then choose their appropriate role(s) from the dropdown. You may delegate multiple roles.
- To add contacts who do not currently have accounts in PASSPort, please refer to Additional Resources below.

 Additional Resources: [Contract Registration for Vendors User Manual](#) – Section 3.1 Setup Team Tab; [Adding Vendor Users and Assigning Roles Job Aid](#); [Adding a Contact to your PASSPort Account Video](#)

### Finding a Contract and Next Steps

Your organization knows that it has a contract ready for processing in PASSPort through two notification practices:

- Organization's Vendor Admin(s) will receive an email notification from PASSPort.
- Logging into your organization's PASSPort account at [nyc.gov/passport](http://nyc.gov/passport).
  - Click the **Contracts** menu option at the top of the homepage and select **Manage My Contracts** from the drop-down. The discretionary contract(s) will be identified by the program name "Council Discretionary."
  - Check the **Open Workflow Tasks** tile on your PASSPort homepage to identify contract tasks that are pending completion in PASSPort.

 Additional Resource: [Contract Registration for Vendors User Manual](#) – Section 3 Managing My Contracts Overview: Contract Registration


### Adding Site Information

- Sites** can be found on the left blue bar.
- Click **Add Address** to indicate where services will be delivered.
- If multiple addresses are necessary, provide an identifying name for the "Address Label." For bundled awards, you may want to use the Award ID in the Address Label.

- You may change sites up until submission of vendor document request task. After that point, sites may only be updated upon contract registration via a "Contract Change Request."


## Completing LL34

- LL34 Compliance** can be found on the left blue bar.
- LL34 replaces the former Doing Business Database Form and must be completed by the Vendor Admin. Once a contract is initiated by the Agency, the Vendor Admin cannot be changed for LL34 completion.
- Select the organization's **Principal Officers** by clicking the ellipsis (box with three dots) and selecting the appropriate individual(s) in the **Add Contact** popup window.
- Exclude any officer titles that are not applicable to your organization by selecting the checkmark next to the title.
- Select "entity is not for profit" under **Principal Owners**.
- Add at least one **Senior Manager** by clicking the ellipsis.

 Additional Resource: [Contract Registration for Vendors User Manual](#) – Section 3.7 LL34 Compliance Tab

## Submitting Requested Documents

- The **Documents** tab can be found on the left blue bar.
- Complete each **Requested Document Type** (outside of PASSPort) – templates are available on [nyc.gov/nonprofits](http://nyc.gov/nonprofits), under Funding Opportunities tab, [City Council Discretionary Funding](#).
- Upload completed documents by clicking **Add Documents** in **Vendor Documents**.
- Select the corresponding requested document type from the popup list, fill out any additional required fields, and upload the completed document.
- When creating a document name, please use the naming conventions provided in the [Discretionary Contracting Document Naming Guide](#).
- For documents that require adjustments before final approval (e.g., scopes of work and budgets), contracting Agency may request provider to share and revise them outside of PASSPort. Once finalized, provider may then upload them to PASSPort, as requested.


 Additional Resource: [Contract Registration for Vendors User Manual](#) – Section 3.3 Documents Tab Overview, Section 3.4 Vendor Document Upload

## Reviewing Contract Agreement

- Vendor Admin(s) will receive email notification from PASSPort when it is time to review the contract agreement. They can also find the contract agreement in **Authoring Documents** within **Documents**.
- Select the **Vendor Contract Signatory** to kick off DocuSign electronic signature.

 Additional Resource: [Contract Registration for Vendors User Manual](#) – Section 3.5 Vendor Contract Agreement Overview

## Signing the Contract

- This step takes place in DocuSign.
  - Vendor Contract Signatory** will receive an email with DocuSign link to the Contract Signature Page.
  - Click **Review Document** in the email to launch the document in DocuSign.
  - Click the yellow **Sign** button that appears on the signature line.
  - Preview the signature that appears in the **Adopt Your Signature** popup window.
  - Click on the orange **ADOPT AND SIGN** button on the lower left corner of the popup window to electronically sign your contract.
  - Click the orange **Finish** button to finalize your signature.
  - Once the document is signed by all parties, DocuSign will send “Completed: Signature Request” email notification with the PDF document attached and a link to **View the Completed Document**.
-  Additional Resources: [Contract Registration for Vendors User Manual](#) – Section 4 Completing Organization Signature; [E-signing Using DocuSign Video](#)

## Tracking Registration Status

- Once the contract registration package is complete, contracting Agency submits for registration.
- Vendor Admin(s) will receive an email from PASSPort when contract is registered.
- Track the progress of your contract:
  - Use the **Award Milestones** tracker found in **Overview** located on the left blue bar.
  - In the **Contracts** dropdown menu, click **Manage My Contracts** and navigate to the status column and/or filter.

## Questions and Support Services

### Navigating PASSPort

- For assistance with PASSPort, please consult the [Learning to Use PASSPort webpage](#) at [nyc.gov/passport](http://nyc.gov/passport), which includes helpful user guides, e-learning courses, videos, and more.
- Please contact MOCS with any questions.

### City Council Discretionary Award Process

- If you have questions about your award application and allocation, including purpose of funds, please contact the City Council Discretionary Unit at [discretionary@council.nyc.gov](mailto:discretionary@council.nyc.gov). You may also refer to [City Council's Discretionary Funding Policies and Procedures](#).
- Central repository for discretionary vendor documents is available at [nyc.gov/nonprofits](http://nyc.gov/nonprofits), under Funding Opportunities tab, [City Council Discretionary Funding](#).
- Questions about service delivery, subcontracting, and invoicing for reimbursement should be directed to your contracting City Agency.