



## Contract Registration for Vendors

<p><b>Roles Involved:</b></p> <ul style="list-style-type: none"><li>• Vendor Admin</li><li>• Vendor Contract Signatory</li><li>• Vendor Financials L1 &amp; L2</li></ul>	<p><b>Summary:</b></p> <p>Step-by-step instructions for contract registration activities in PASSPort.</p>
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Last Updated: July 2020

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## About PASSPort

PASSPort, the City of New York's Procurement and Sourcing Solutions Portal, facilitates an end-to-end digital procurement process that is transparent and easy to access. Designed with and for vendors and City agencies, PASSPort leverages technology to address long-standing procurement issues, establish a more timely procurement process and make it easier to do business with the City of New York. PASSPort allows for online solicitations, awards and contract execution, registration and management.

## Accessing PASSPort

**Adjusting Font Size.** While navigating PASSPort, you are able to easily increase its font size and readability. To do this, hold "ctrl" (or, on a Mac, "command") and press the "+" key on your keyboard. Each time you click the "+" key, your web browser will zoom in and PASSPort will resize accordingly. To reduce PASSPort's font size, hold "ctrl" (or, on a Mac, "command") and press the "-" key.

**Tool Tips.** There are tool tips available throughout PASSPort that provide quick and helpful information relevant to specific fields. Tool tips can be accessed by hovering over the Information ⓘ icon.

**Required Fields.** Some information fields are required in PASSPort. These are indicated by a red marker. A user will not be able to move past a PASSPort screen without completing required fields.

## 1. Introduction

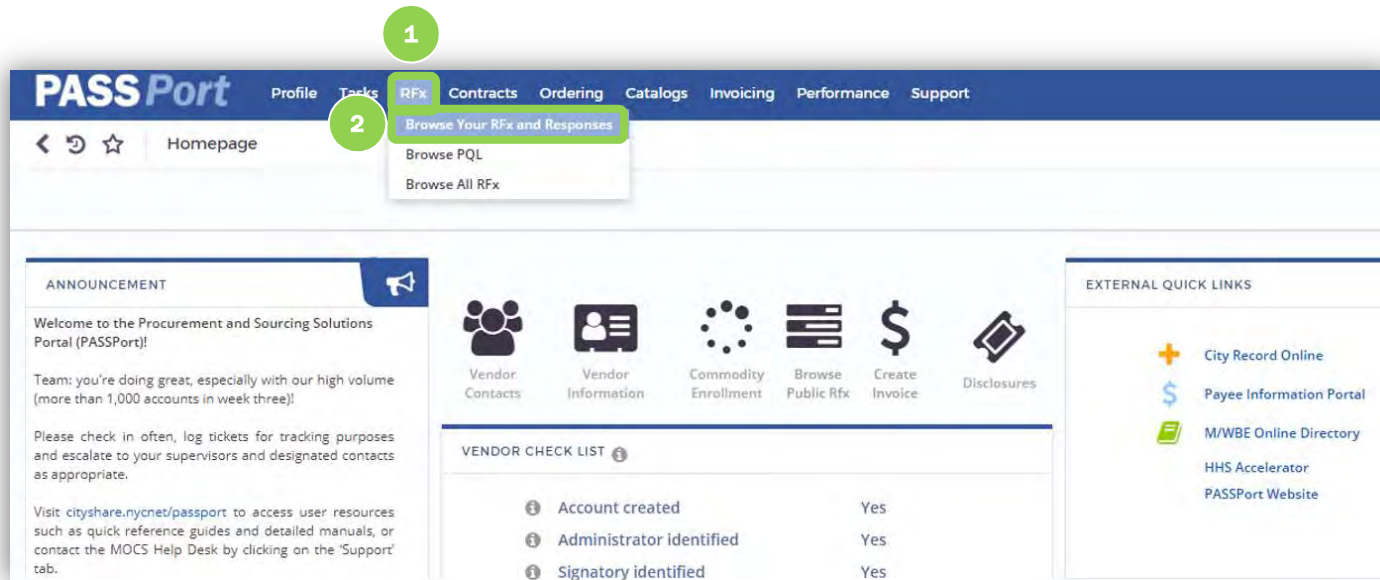
The Contract Registration for Vendors User Manual provides an overview of the contract registration process in PASSPort. After a vendor is selected for an award, they will enter into the contracting process in PASSPort. Vendors will have access to the contract record upon contract initiation but will be unable to complete any activities until the agency sends a task to the vendor. The first task the vendor will receive is to upload any requested documents. The vendor will complete this in the Documents Tab. The vendor will also identify a site in Sites Tab and complete the Doing Business Data Form in the LL34 section as part of this initial task.

When the contract document is ready, agencies have the option to share the Contract document prior to it being sent to the Law Department for approval. Vendors will be able to review, make changes and approve the document. Agencies have the option to send the Contract document directly to the Law Department for approval. In both instances, after the Law Department approves the Contract, agencies will send vendors the contract for a vendor final review. Vendors will receive a notification that the Authoring Document is ready to be reviewed in PASSPort. Upon the completion of the review of the Authoring Document, the final step is for the vendor to sign the Contract Agreement electronically in-system through DocuSign. Vendors will start this process by selecting a Vendor Contract Signatory to prepare the Authoring document for their signature. When the agency has initiated the Electronic Signature process, the identified Vendor Contact Signatory will be able to access the document and provide their signature within DocuSign. Once the document is signed by both parties, the Vendor will receive a notification that will include a copy of the signed document attached.

Once the contract package is complete in PASSPort, and all necessary actions are fulfilled by both the City and vendor, the contract package will be sent to the Comptroller for registration.

# 1. Award Selection Status

Submitted responses will be reviewed, and vendors selected for award based on criteria specified in the RFX. Awarded vendors will work with the contracting agency to complete actions directly in PASSPort, streamlining the contracting process. This first section will walk through the award selection notification process. The following sections will outline each subsequent step required to complete the contracting process in PASSPort.



1. From any page in PASSPort, click the “RFX” menu option at the top of the page.

2. To view RFX responses submitted by your organization, select “Browse Your RFX and Responses” from the drop-down menu.


**PASSPort** Profile Tasks **RFX** Contracts Ordering Catalogs Invoicing Performance Support

← ⌂ ☆ Browse Your RFX and Responses

Keywords :  RFX Status : **Selections Made**

Round :  Agency :  Procurement Method :  Main Commodity :  Additional Commodities :

Program :  Industry :

Program	Industry	EPIN	Agency	Procurement Name	Procurement Method	RFX Status	RFX Open Date (Your Local Time)	RFX Close Date (Your Local Time)
 testtt PRG	Standard Services	12520ND135	GENERAL COUNSEL	12520ND135-Kanika_Eval	Negotiated Acquisition	Selections Made	03/27/2020 00:00:00	04/09/2020 00:00:00

You can filter your responses to see which RFX have received selection updates.

3. Select **“Selections Made”** from the **RFX Status** drop-down. This will display all RFX to which your organization has submitted a response and where an agency has made their award selections.

4. Click the **pencil icon** to open an RFX response and view more details about the RFX, including whether or not your organization has been selected for award.

Closed (no new proposal can be submitted)

RESPONSE ACTIVITY

Status:

Canceled  
 Submitted  
 In progress

Competition Pool:

RFx Name	Response Name	Competition Pool	Responsiveness Status	Submission Status	Response Progress	Questions Answered	Submitted on (Your Local Time)	Selection Status
85620B0237- Kapil Thakkar	Proposal # 1	kapil_competition_pool_test	Accepted for Review	Submitted	0%	100%	03/25/2020 12:44:50	Selected

1 Result(s)

5. To view your organization's selection status, click the "Manage Responses" tab on the left-hand navigation bar.

**Note:** The **Submission Status** will appear in green as "Submitted."

Closed (no new proposal can be submitted)

RESPONSE ACTIVITY

Status:

Canceled  
 Submitted  
 In progress

Competition Pool:

RFx Name	Response Name	Competition Pool	Responsiveness Status	Submission Status	Response Progress	Questions Answered	Submitted on (Your Local Time)	Selection Status
85620B0237- Kapil Thakkar	Proposal # 1	kapil_competition_pool_test	Accepted for Review	Submitted	0%	100%	03/25/2020 12:44:50	Selected

1 Result(s)

6. If the agency has selected your response for award, your **Selection Status** will be "Selected."

A status of "Not Selected" indicates the agency did not select your response for award.

**PASSPort**

< > Sent Notification Close

ID	303534
From	"PASSPort" <no-reply-passport-nyc@ivalua.com>
To	"G g" <fsda@mail.com> (g g)
CC	
BCC	
Reply to	no-reply-passport-nyc@ivalua.com
Acknowledged by	
Date	Monday, 30 March 2020 11:55:01
Subject	[PASSPort Notification]: 81620Z0007-UAT - EVAL - Task Order TO 02Vendor Notification / Award Selection Made
Message	<p>Dear g g,</p> <p>Selections have been made for the following RfX:</p> <p>81620Z0007-UAT - EVAL - Task Order TO 02  DEPARTMENT OF HEALTH AND MENTAL HYGIENE  81620Z0007-UAT - EVAL - Task Order TO 02 RfX  !  Script Test</p> <p>To view the result for your submitted Response, please click on the link <a href="#">81620Z0007-UAT - EVAL - Task Order TO 02 RfX</a> and navigate to the referenced Response on the 'History' tab of this RfX.</p> <p>Regards,</p> <p>The PASSPort Team  Mayor's Office of Contract Services (MOCS)</p> <p><small>This is an automated message; please do not reply to this email. If you have any questions or need assistance, please reach out to MOCS at <a href="mailto:help@mocs.nyc.gov">help@mocs.nyc.gov</a>.</small></p>

Agencies can also choose to notify you of your award selection directly in PASSPort, as part of their award selection process. In this instance, PASSPort will send an email notification advising you of your award selection status.

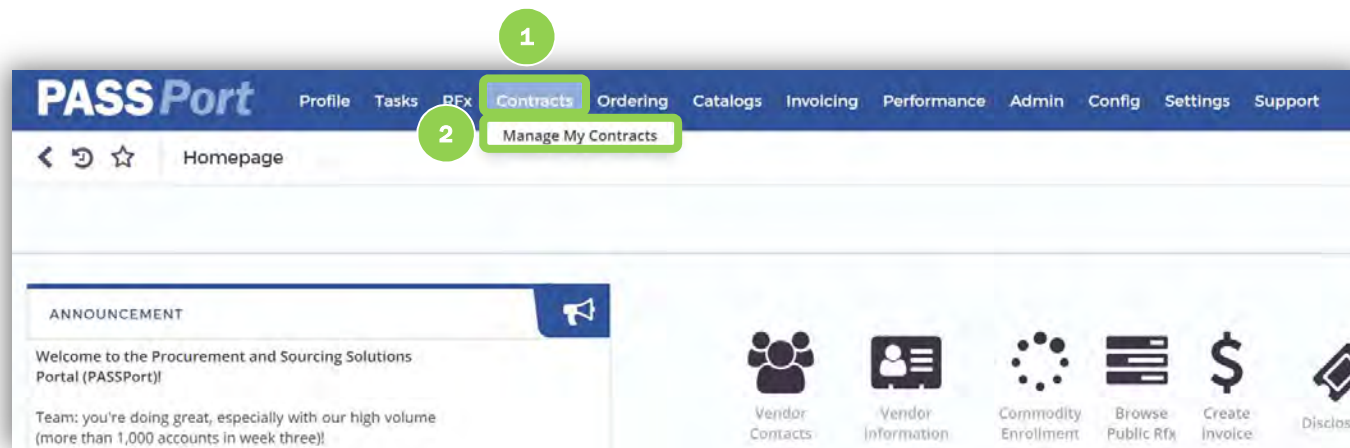
Within the email notification, click on the hyperlinked RfX title will take you to the specific RfX in PASSPort.



### 3. Managing My Contracts Overview: Contract Registration

Once selected for award, a vendor will complete all of the necessary actions required for the contract to be registered. This section will walk through how to view a contract in PASSPort, and all corresponding high-level contracting information.

The below step-by-step process workflow provides an overview of all of the steps involved in the standard contracting process in PASSPort.



1. From any page in PASSPort homepage, click the “**Contracts**” at the top of the page.

2. Select the “**Manage My Contracts**” option from the drop-down menu.

**PASSPort** Profile Tasks RFX **Contracts** Ordering Catalogs Invoicing Performance Support

Manage My Contracts

Keywords:  Program:  Agency:  Procurement Method:






Industry:  Contract Start Date:  to  Contract End Date:

Current Contract Amount: between  and  Original Contract Amount: between  and

Contract Registration Date:  to

FMS Contract Type:

Alerts:

E-PIN	Contract Title	Agency	Vendor	Program	Procurement Method	FMS Contract Type	Current Contract Amount	Original Contract Amount	Contract Start Date	Contract End Date	Contract Registration Date	Status
	81620P0018-UAT CSP Evaluation One	DEPARTMENT OF HEALTH AND MENTAL HYGIENE	November Vendor	UAT Program	Competitive Sealed Proposal	General Contract (CT1)	2,000,000.00		01/01/2021	12/31/2023		Draft
	81620P0012-UAT Sourcing Two	DEPARTMENT OF HEALTH AND MENTAL HYGIENE	November Vendor	UAT Program	Competitive Sealed Proposal	General Contract (CT1)	1,000,000.00		05/05/2020	06/01/2020		Draft
		DEPARTMENT OF HEALTH AND MENTAL HYGIENE	November Vendor		Intergovernmental OGS	General Contract (CT1)	11,000,000.00		04/10/2020	04/08/2022		Draft
	81620N0004001 81620N0004-Oversight UAT RP 4102020	DEPARTMENT OF HEALTH AND MENTAL HYGIENE	November Vendor	UAT Program	Negotiated Acquisition	General Contract (CT1)			04/10/2020	04/08/2022		In Progress
	81620N0003001 81620N0003-Req. 04/10/2020	DEPARTMENT OF HEALTH AND MENTAL HYGIENE	November Vendor	UAT Program	Negotiated Acquisition	General Contract (CT1)			04/10/2020	04/08/2022		In Progress

Upon clicking **Manage My Contracts**, a list of your organization's contracts available in PASSPort will be displayed.

**Note:** All RFX responses submitted and selected for award in PASSPort will be processed in PASSPort.

3. Click the **pencil icon** to open and view a contract.

The screenshot shows the PASSPort interface with the 'Contracts' tab selected. The left sidebar contains navigation options: Overview, Header (highlighted with callout 2), Setup Team, Sites, Documents, and Subcontractors. The main content area is divided into three sections:

- Alerts (Callout 1):** A section titled 'ALERTS' containing five warning messages:
  - All the documents in the Registration Package have not been converted to PDF.
  - One or more documents has expired.
  - One or more documents will expire in 30 days.
  - One or more documents will expire in 60 days.
  - One or more documents will expire in 10 days.
- Contract Header (Callout 2):** A section titled 'CONTRACT HEADER' displaying key contract information:
  - Status: In Progress
  - Source: PASSPort
  - Procurement Method: Competitive Sealed Bid
  - Contract ID:
  - Title: 85620B0020-RP UAT CSB Req. 02/20/2020
  - Vendor: November Vendor 112220171
  - Contracting Agency: DEPARTMENT OF CITYWIDE ADMINISTRATIVE SERVICES
  - E-PIN: 85620B0020001
  - Validity status: N/A
  - Commodities: 011 - Art Supplies and Equipment
  - Industry: Goods
  - Division: CHIEF OF STAFF
  - Renewal Options: No
  - Final Contract Amount: 280,000.00
  - Start Date: 02/20/2020
  - End Date: 02/18/2021
  - Vendor Filing Status: Filed
- Contract Description (Callout 3):** A section titled 'CONTRACT DESCRIPTION' containing:
  - Contract Description: DG test

The **Header** tab information will display with key details related to the contract.

1. The **Alerts** tile shows pending completion tasks for contract registration and provides messages to help guide you through the process.

2. The **Contract Header** tile displays key contract information, including contract **Status, Source, Procurement Method, Title, Vendor, Contracting Agency, E-PIN** and more.

3. The **Contract Description** tile contains a written description of the contract provided by the Agency.

**PASS Port** Profile Tasks RFx **Contracts** Ordering Catalogs Invoicing Performance

Contract

- Overview
- Header
- Setup Team
- Sites
- Documents
- Subcontractors

Commodities : 011 - Art Supplies and Equipment  
 Industry : Goods  
 Division : CHIEF OF STAFF  
 Renewal Options : No  
 Final Contract Amount : 280,000.00  
 Start Date : 02/20/2020  
 End Date : 02/18/2021  
 Vendor Filing Status : Filed

**4**

M/WBE GOALS

*Changes in participation goals must be entered in differential amounts*

GROUP	CURRENT PARTICIPATION GOALS (%)
Unspecified :	
Black American :	
Native American :	
Hispanic American :	
Asian American :	
Women :	
<b>TOTAL</b>	<b>0</b>

4. The **M/WBE Goals** tile includes a table where participation goals for the procurement will be displayed. Note: this section will only appear if this procurement is participating in the M/WBE program.

**PASSPort** Profile Tasks RFx **Contracts** Ordering Catalogs Invoicing Performance Support

Contract

**Overview**

Header  
Setup Team  
Sites  
Documents  
Subcontractors

## 85620B0020-RP UAT CSB Req. 02/20/2020

Contract ID :  
E-PIN : 85620B0020001  
Vendor : November Vendor 112220171  
FMS Contract Type : General Contract (CT1)  
Source : PASSPort  
Contracting Agency : DEPARTMENT OF CITYWIDE ADMINISTRATIVE SERVICES  
Status : In Progress

**CURRENT CONTRACT**  
Amount : 280,000.00  
Start Date : 02/20/2020  
End Date : 02/18/2021

**VENDOR TEAM**

name		email
LoriFN Lori LN	GM	Lori@lori.com
LoriFN Lori LN	GM	Lori@lori.com
Peter Singh	Sr. Manager	mymail@mailinator.com
Peter Singh	Sr. Manager	mymail@mailinator.com
Peter Singh	Sr. Manager	mymail@mailinator.com
Test User FN Test User LN	Senior Manager	sac@sac.com

6 Result(s)

**INTERNAL AGENCY TEAM**

name	function	email
Ava DCAS16	Agency Contact	Ava_DCAS16@mailinator.com

1 Result(s)

Additional contract details can be found in the **Overview** tab.

1. At the top of the **Overview** screen is a section that displays high-level contract information, including the **Contract title, Contract ID, E-PIN, Vendor, FMS Contract Type, Source, Contracting Agency** and the current **Status** for the Contract. This section also includes the contract **Amount, Start** and **End Date**.

2. The **Vendor Team** section lists all of the members of your organization that have been added to this Contract team.

3. The **Internal Agency Team** tile displays the key agency contacts for the contract, their core function and their email address.

**PASSPort** Profile Tasks RFX **Contracts** Ordering Catalogs Invoicing Performance Support

Contract

4

AWARD MILESTONES

Status	Detail
	Award Creation
	Agency Award Documentation
	ACCO Approval Award Documentation
	Vendor Documents Request
	Vendor Documentation Submission
	EO 102 Review
	Responsibility Determination
	Vendor Filing Status
	Agency Draft Financial Allocations
	Agency Certification of Funds
	Agency Contract Drafting
	Vendor Contract Review
	LAW Department Contract Review
	Contract Signature
	Public Hearing Request Submission

1 2 > 22 Result(s)

4. The **Award Milestones** tile provides an updated account of your contract's progress on the path toward registration and tracks the completion status of key contracting milestones.

**Key:**

Green check marks indicate **completed** milestones.

Yellow clocks indicate milestones **in progress**.

Gray circles indicate milestones that have **not yet been started** for a particular contract.

## 3.1 Setup Team Tab

The **Setup Team** tab is where you will be able to develop and manage the team dedicated to this contract's activities. A Vendor **Adding Contacts and Assigning Roles** Job Aid has been created to provide you with information on user roles within the system to help you build your team. Please click [here](#) to view this Job Aid.

The screenshot shows the PASSPort system interface. The navigation menu on the left has 'Setup Team' highlighted with a green circle and the number 1. The main content area has three sections highlighted with green boxes and numbers 2, 3, and 4. Section 2 is the 'SETUP TEAM' table, section 3 is the 'VENDOR CONTACT SIGNATORY' section, and section 4 is the 'Vendor Team' table.

Login	Email	Profile	Contact
Milli_DCAS05@mailinator.com	Milli_DCAS05@mailinator.com	Agency Contact	Milli DCAS05

1 Result(s)

VENDOR CONTACT SIGNATORY

Vendor Contract Signatory :

Contact	Email	Profile	Status
Lori LN LoriFN	Lori@lori.com	Contributor Vendor Procurement L2	Active
Singh Peter	mymail@mailinator.com	Contributor Signatory Vendor admin	Active

1. Click on the “**Setup Team**” tab on the left-hand menu.

2. The **Setup Team** table shows the agency contact(s) with whom you can communicate with directly in-system about this contract.

3. The **Vendor Contact Signatory** section. This section lists the team members from your organization authorized in PASSPort to sign the contract on behalf of your organization.

4. The **Vendor Team** section provides all **Contacts** from your organization who will be working on the contract, and their designated user role **Profile** in connection with the contract. This section also provides additional information, including **Email** and **Status**, for those contacts.

Overview

Header

**Setup Team**

Sites

Documents

Subcontractors

LL34 Compliance

SETUP TEAM

Login	Email	Profile	Contact
Ava_Aging19@mailinator.com	Ava_Aging19@mailinator.com	Agency Contact	Ava Aging19

1 Result(s)

VENDOR CONTACT SIGNATORY

Vendor Contract Signatory : [DesignExtranet Vendor](#)

Vendor Team **1** > **Add Contact**

Contact	Email	Profile	Status
<a href="#">DesignExtranet Vendor</a>	Vendor_Admin_01@mailinator.com	Signatory Vendor admin	Active
<a href="#">FMSSamLN FMSSamFN</a>	FMS_VendorAdmin@mailinator.com	Signatory Vendor admin	Active

To add additional contact(s) to the Contract Vendor Team:

1. Click the "Add Contact" button.



**ADD CONTACT** 8

**Close**

6 Keywords :  **Search** **Reset**

<input type="checkbox"/>	ID	Title	Phone Number	Cell	Email	Other assigned suppliers
7 <input checked="" type="checkbox"/>	FMSFinOneKN FMSFinOneFN				FMSFinOneFN@mailinator.com	SHAN CHEN
<input type="checkbox"/>	FMSFinTwoLN FMSFinTwoFN				FMSFinTwoFN@mailinator.com	SHAN CHEN
<input type="checkbox"/>	FMSProcOneLN FMSProcOneFN				FMSProcOneFN@mailinator.com	SHAN CHEN
<input type="checkbox"/>	FMSProcTwoLN FMSProcTwoFN				FMSProcTwoFN@mailinator.com	SHAN CHEN
<input type="checkbox"/>	FMSVenConLN FMSVenConFN				FMSVenConFN@mailinator.com	SHAN CHEN
<input type="checkbox"/>	FMSVendorFN FMSVendorFN				FMSVendorFN@mailinator.com	SHAN CHEN
<input checked="" type="checkbox"/>	DesignExtranet Vendor	CTO			Vendor_Admin_01@mailinator.com	5114 / Megatrendz Media USA In..
<input checked="" type="checkbox"/>	FMSsamLN FMSSamFN	Vendor Admin			FMS_VendorAdmin@mailinator.com	5114 / CHEN CHEN / SHAN CHEN

8 Result(s)

Upon clicking “Add Contact,” a **Add Contact** window will appear.

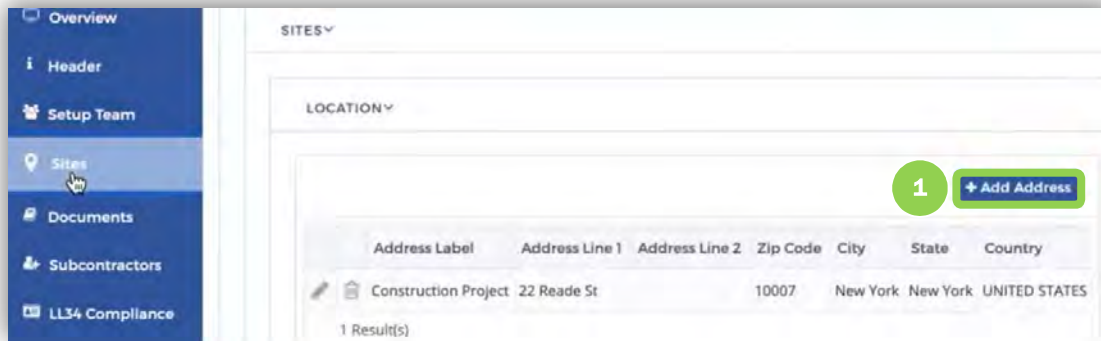
6. Enter the name of the team member you would like to add in the Keywords field and click “**Search**.”

7. Select the **checkbox** next to the name(s) of team members you want to add.

8. Click the “**Close**” button. The new user(s) will now be a part of the Contract vendor team.

## 3.2 Sites Tab

The **Sites** tab includes information on the location of the contract project. You may include multiple locations if the project is being implemented at multiple sites. Entering site information is one of the first tasks vendors will need to complete (uploading required documents and updating LL34 information will be covered in the following sections.)



Vendors can add a site(s) to identify where they will be performing work for this contract.

1. To add a site, click the **“Add Address”** button.

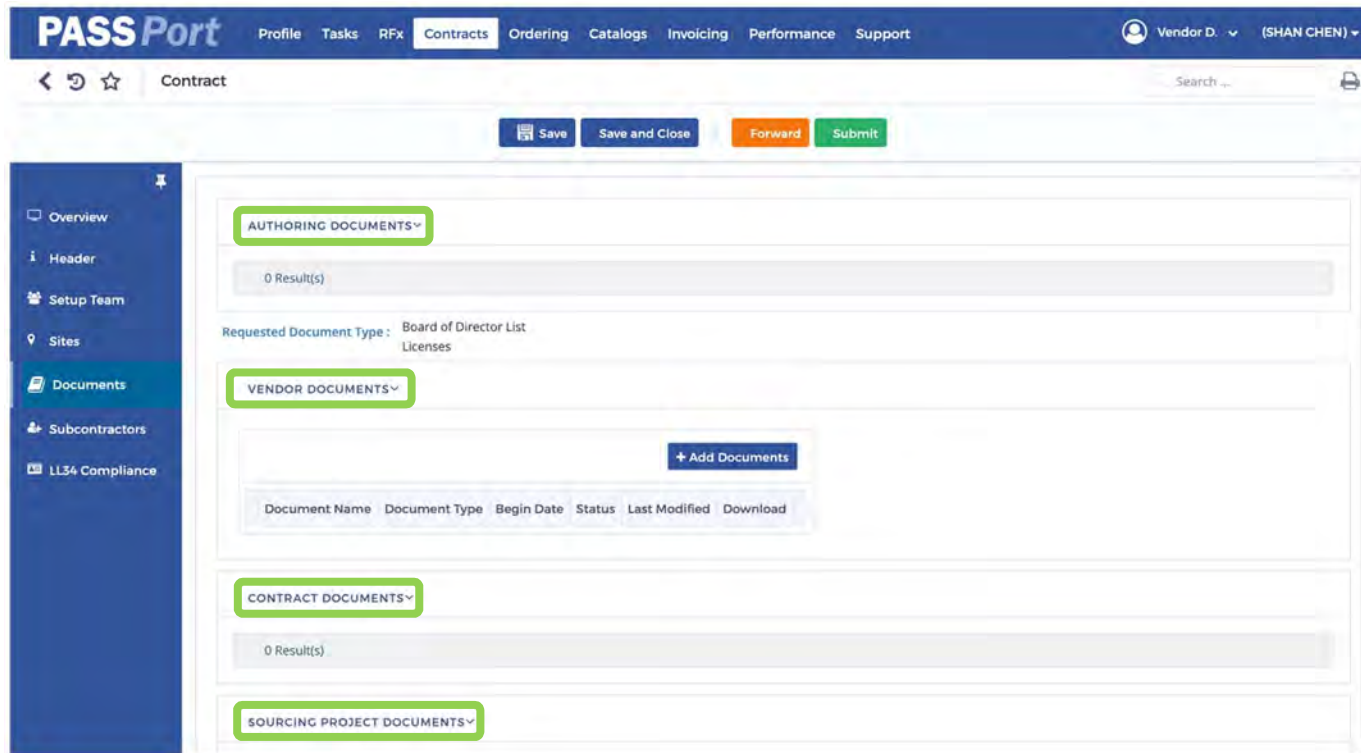
2. In the appearing pop-up, complete the address information by filling out required fields, as indicated by red highlight.

**Note:** You may add an *Address Label* to help identify the address in system.

3. Click the “**Save and Close**” button.

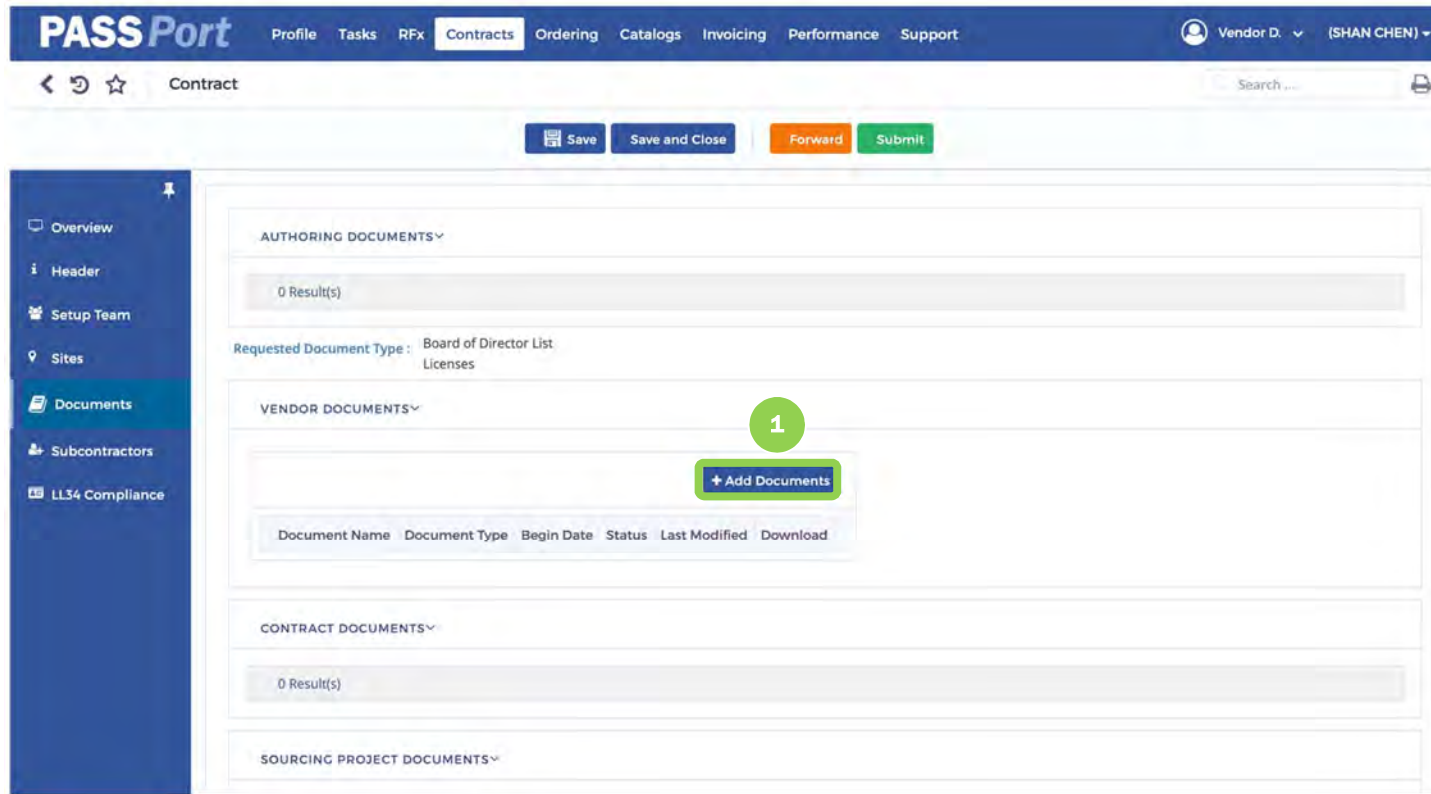
### 3.3 Documents Tab Overview

The Documents tab contains three sections: **Authoring Documents**, **Vendor Documents**, **Sourcing Project Documents** and **Contract Documents**. Each section facilitates critical activities in the contract development process. The **Authoring Documents** will be where the contract agreement will be available for your review. The **Vendor Documents** section is where the agency will outline which documents are necessary for you to submit for this contract. Common examples include certifications and licenses relevant to the work you will perform for this contract. You can upload these requested documents into this section. The **Sourcing Project Documents** section retains documents shared by the agency as part of the Sourcing Project. Any additional contract documents shared by the agency will be available in the **Contract Documents** section.



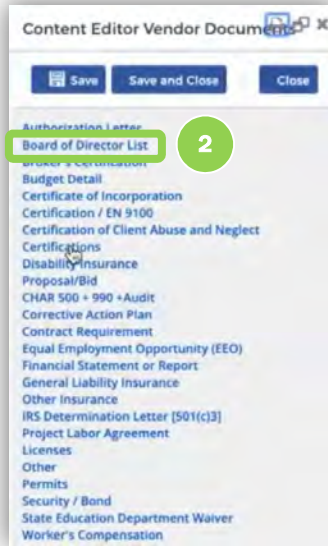
## 3.4 Vendor Document Upload

The first task the vendor will receive from the agency is a request to upload documents the agency needs for the Contract. After the vendor uploads the documents, the vendor will see their documents within the Vendor Documents section.



The **Requested Document type section** is where vendors will see which documents the agency has requested. In this example, two documents are requested: Board of Director List and Licenses.

1. To upload, click **“Add Documents.”**



2. A listing of pre-loaded **document types** appears on the screen. Find and click to select the title of the relevant document that will be uploaded.

The screenshot shows a window titled "Certifications" with a toolbar at the top containing "Save", "Save and Close", and "Close" buttons. Below the toolbar is a "DOCUMENT" section with a green circle containing the number 3 around it. This section contains a "Version" input field, a "Document Name" input field, and a "Validity" section with "Begin Date" and "Expiration Date" date pickers. Below the "DOCUMENT" section is an "INFORMATION" section with a green circle containing the number 4 around it. This section shows "Status: Unloaded" and an "Upload a Document" button with a file icon and the text "Click or Drag to add files". A green circle containing the number 5 is positioned above the "Save and Close" button.

Upon selecting a document type, a window will appear for you to complete related to the document selected.

3. Fill out the required fields.
4. Upload the document.
5. Click **“Save and Close.”**

**Note:** documents must be Word, Excel, or PDF to upload.

**PASSPort** Profile Tasks RFX **Contracts** Ordering Catalogs Invoicing Performance Support Vendor D. (SHAN CHEN)

Contract Search

Overview  
Header  
Setup Team  
Sites  
**Documents**  
Subcontractors  
LLSA Compliance

**AUTHORING DOCUMENTS**  
0 Result(s)

Requested Document Type: Board of Director List  
Licenses

**VENDOR DOCUMENTS**

Document Name	Document Type	Begin Date	Status	Last Modified	Download
Board of Directors List	Board of Director List		Uploaded	07/21/2020	PDF Document.pdf
Licence	Licenses	07/21/2020	Uploaded	07/21/2020	PDF Document.pdf
2 Result(s)					

**CONTRACT DOCUMENTS**  
0 Result(s)

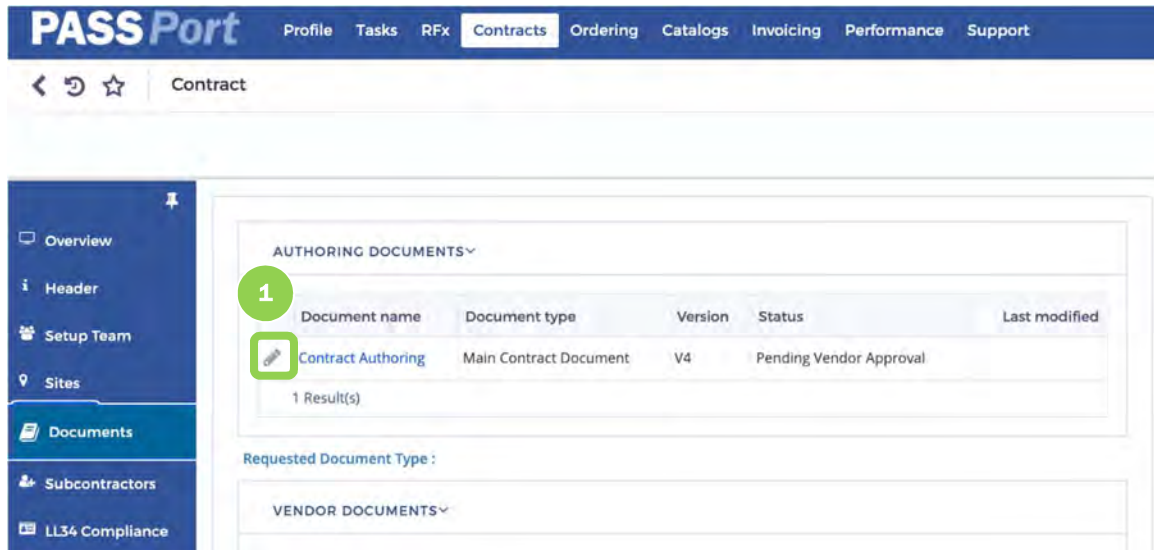
**SOURCING PROJECT DOCUMENTS**

After the documents have been uploaded successfully, they will appear in the Vendor documents tile. Details about the document including the Document Name, Document Type, Begin Date, Status & Last Modified are displayed in the table. There is also an option to download the document.



## 3.5 Vendor Contract Agreement Overview

The Authoring Documents section is where the Contract Document will be available for vendors. Agencies follow a contract authoring workflow that includes an internal drafting process, an option to share the Authoring Document with the Vendor prior to LAW Department approval (if required) and a mandatory final document review where vendors will review and approve the Authoring Document in PASSPort. This section outlines the steps vendors take to complete this process.



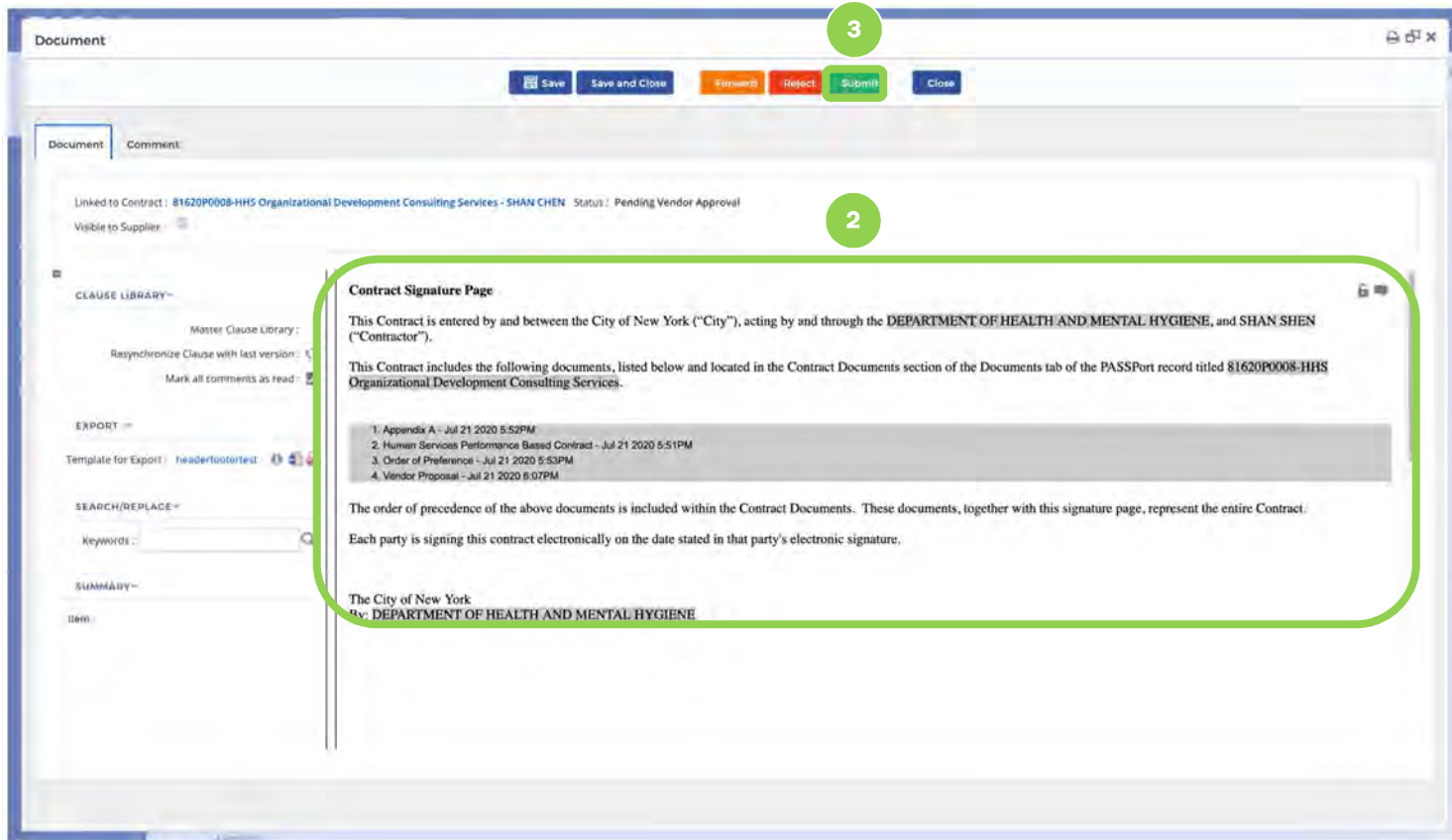
The screenshot shows the PASSPort interface with the 'Contracts' tab selected. The main content area displays a table of 'AUTHORING DOCUMENTS'. The table has the following structure:

Document name	Document type	Version	Status	Last modified
Contract Authoring	Main Contract Document	V4	Pending Vendor Approval	

A green circle with the number '1' is placed over the pencil icon in the first row of the table. Below the table, it says '1 Result(s)'. The left sidebar contains navigation options: Overview, Header, Setup Team, Sites, Documents (highlighted), Subcontractors, and LL34 Compliance. The top navigation bar includes Profile, Tasks, RFx, Contracts, Ordering, Catalogs, Invoicing, Performance, and Support.

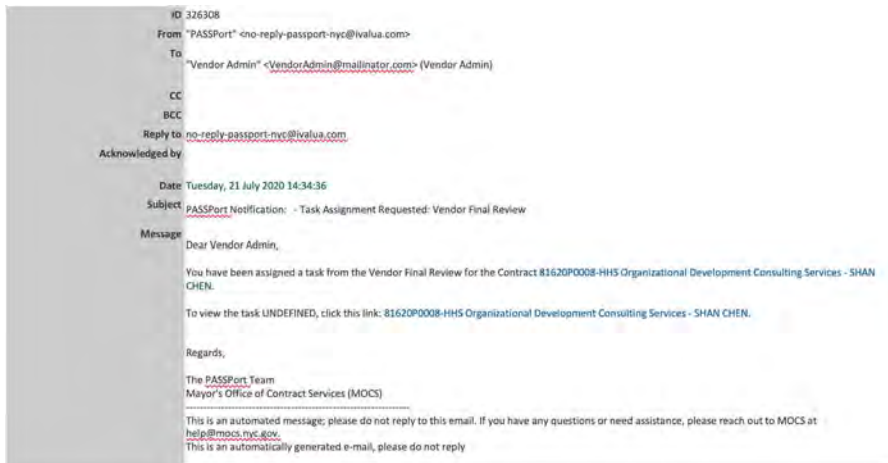
If the agency decides to provide a vendor review prior to LAW approval, the vendor may complete the following steps in PASSPort.

1. Click on the **pencil icon** to open the Contract document.



2. The Vendor will be able to review the document and make changes to the Authoring Document.

3. After the vendor review is complete, the vendor clicks **Submit** button to return the reviewed Authoring Document to the agency,




After the agency has completed the Contract document and the LAW department has provided approval (if required,) the designated Agency Legal Manager will send the contract to the Vendor to review in PASSPort.

The Vendor will receive a notification that the Authoring Document is ready for final review in PASSPort.


**PASSPort** Profile Tasks RFX **Contracts** Ordering Catalogs Invoicing Performance Support Vendor D. (SHAN CHEN)

Contract

Overview Header Setup Team Sites Documents Subcontractors LLSA Compliance

**1** 



**AUTHORING DOCUMENTS**

Document Name	Document Type	Version	Status	Download
Signature Page	Main Contract Document	V1	Pending Final Review	

1 Result(s)

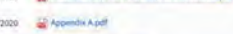
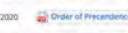


Requested Document Type: Board of Director List Licenses

**VENDOR DOCUMENTS**

Document Name	Document Type	Begin Date	Status	Last Modified	Download
Board of Directors List	Board of Director List		Uploaded	07/21/2020	
License	Licenses	07/21/2020	Uploaded	07/21/2020	

2 Result(s)

**CONTRACT DOCUMENTS**

Document Name	Document Type	Version	Begin Date	Expiration Date	Status	Last Modified Date	Download
Human Services Performance Based Contract	Contract				Uploaded	07/21/2020	
Appendix A	Contract				Uploaded	07/21/2020	
Order of Preference	Contract				Uploaded	07/21/2020	
Vendor Proposal	Contract				Uploaded	07/21/2020	

Upon clicking the link in the e-mail notification, the Vendor will enter the Documents tab within the Contract section.

1. Vendor will click on the pencil button to review the Authoring Document. In this case, it is a Signature Page.

Note: the vendor will also be able to review the additional Contract Documents that the agency has uploaded in the Contract Documents section.

Document

Save Save and Close Forward Reject Approve Close

Document Comment

Linked to Contract : 81620P0008-HHS Organizational Development Consulting Services - SHAN CHEN Status: Pending Final Review

Visible to Supplier :

Vendor Contract Signatory :

2

CLAUSE LIBRARY

Master Clause Library :

Resynchronize Clause with last version :

Mark all comments as read :

EXPORT

Template for Export : headerfootertest

SEARCH/REPLACE

keywords :

SUMMARY

Item

Contract Signature Page

This Contract is entered by and between the City of New York ("City"), acting by and through the DEPARTMENT OF HEALTH AND MENTAL HYGIENE, and SHAN SHEN ("Contractor").

This Contract includes the following documents, listed below and located in the Contract Documents section of the Documents tab of the Passport record titled 81620P0008-HHS Organizational Development Consulting Services.

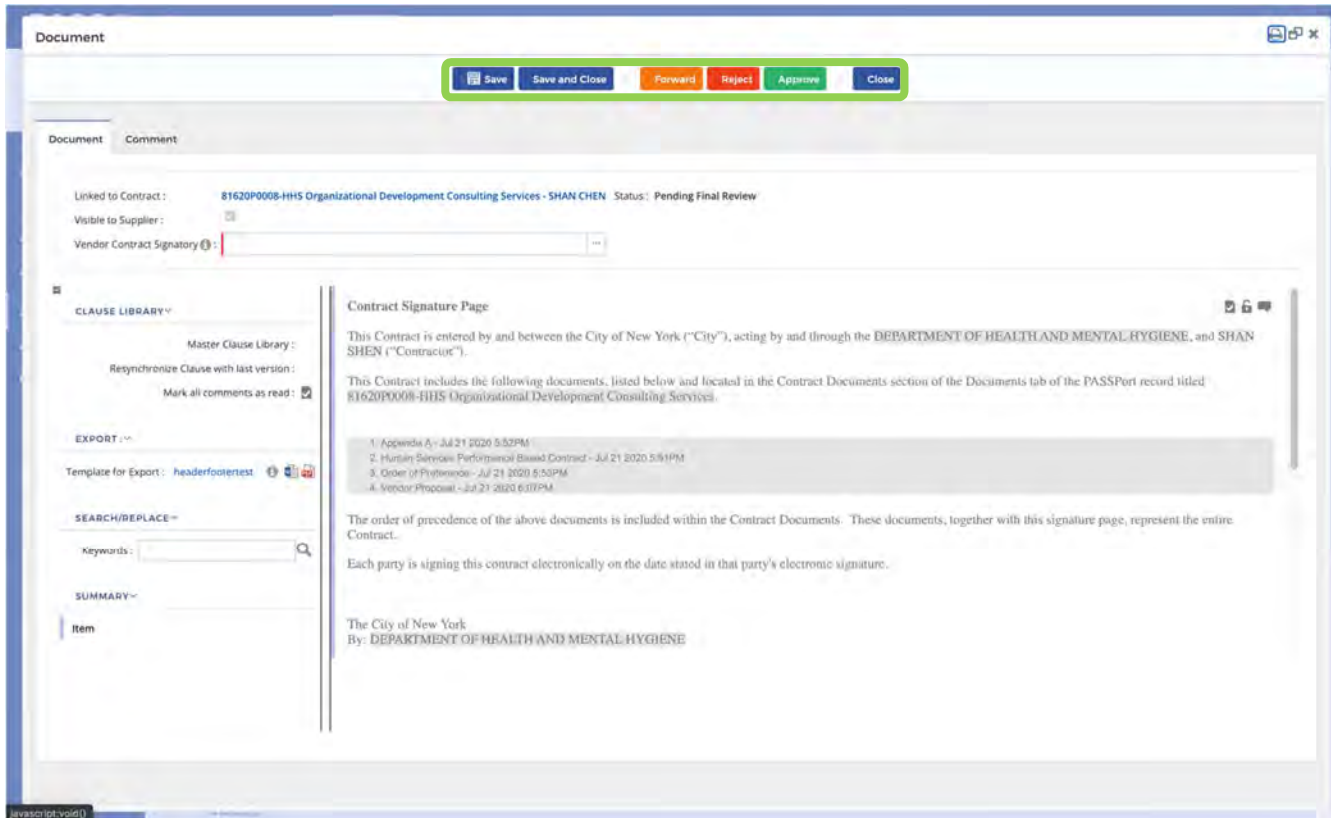
1. Appendix A - Jul 21 2020 5:52PM
2. Human Services Performance Based Contract - Jul 21 2020 5:51PM
3. Order of Preference - Jul 21 2020 5:53PM
4. Vendor Proposal - Jul 21 2020 6:07PM

The order of precedence of the above documents is included within the Contract Documents. These documents, together with this signature page, represent the entire Contract.

Each party is signing this contract electronically on the date stated in that party's electronic signature.

The City of New York.  
By: DEPARTMENT OF HEALTH AND MENTAL HYGIENE

2. The vendor will review the text of the Signature Page. The Signature Page lists the exact names of all of the documents that are part of the agreement.



Following the vendor's review, the vendor may take the following actions:

**Save** : Save any changes made in the window.

**Save and Close** : Saves any changes made in the window and take the Vendor back to the Documents Tab.

**Forward** : Allows the task to be forwarded to another Vendor Contact.

**Reject** : Rejects the task back to the Agency.

**Approve** : Approves the task and will allow for the Signature task to be initiated.

**Close** : Will take the Vendor back to the Documents Tab

3. The Vendor will select the **Vendor Contract Signatory** from the list of Contract Signatories designated in their vendor record.

4. Click the **Approve** button.

Document

Save Close

Document Comment

Linked to Contract : 81620P0008-HHS Organizational Development Consulting Services - SHAN CHEN Status : Approved

Visible to Supplier :

CLAUSE LIBRARY

Master Clause Library :

Resynchronize Clause with last version :

Mark all comments as read :

EXPORT

Template for Export : headerfootertest

SEARCH/REPLACE

Keywords :

SUMMARY

Item

Contract Signature Page

This Contract is entered by and between the City of New York ("City"), acting by and through the DEPARTMENT OF HEALTH AND MENTAL HYGIENE, and SHAN SHEN ("Contractor").

This Contract includes the following documents, listed below and located in the Contract Documents section of the Documents tab of the PASSPort record titled 81620P0008-HHS Organizational Development Consulting Services.

- 1. Appendix A - Jul 21 2020 5:52PM
- 2. Human Services Performance Based Contract - Jul 21 2020 5:51PM
- 3. Order of Preference - Jul 21 2020 5:53PM
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The order of precedence of the above documents is included within the Contract Documents. These documents, together with this signature page, represent the entire Contract.

Each party is signing this contract electronically on the date stated in that party's electronic signature.

The City of New York  
By: DEPARTMENT OF HEALTH AND MENTAL HYGIENE

Once approved, the status will change to Approved in the Authoring Document. The vendor can click the Close button to enter the main contract record.



**PASSPort** Profile Tasks RFX **Contracts** Ordering Catalogs Invoicing Performance Support Vendor D. (SHAN CHEN)

Contract Search...

**Documents**

**AUTHORING DOCUMENTS**

Document Name	Document Type	Version	Status	Download
Signature Page	Main Contract Document	V2	Approved	

1 Result(s)

Requested Document Type: Board of Director List Licenses

**VENDOR DOCUMENTS**

Document Name	Document Type	Begin Date	Status	Last Modified	Download
Board of Directors List	Board of Director List		Uploaded	07/21/2020	
Licence	Licenses	07/21/2020	Uploaded	07/21/2020	

2 Result(s)

**CONTRACT DOCUMENTS**

Document Name	Document Type	Version	Begin Date	Expiration Date	Status	Last Modified Date	Download
Human Services Performance Based Contract	Contract				Uploaded	07/21/2020	
Appendix A	Contract				Uploaded	07/21/2020	

Within the Documents Tab, the Vendor can now see the Authoring Document status has been updated to **Approved**.

### 3.6 Subcontractors Tab

The **Subcontractors tab** will list any subcontractors added during the RFX submission. It displays basic information on the subcontractor such as the amount of the subcontract, their participation percentage, and the subcontract purpose. This information is carried over from the RFX sections.

Subcontract Amount(\$)	Contract Participation %	Purpose	EIN	Supporting Documents	Start Date	End Date	Vendor M/WBE Certification	Select PASSPort Vendor	Total Amount Paid(\$)	Status
1,000,000.00	16.67	Highway construction	098713158		05/11/2020	07/11/2020	Women Owned	'D' YARD INTERNATIONAL, INC		Filed

1 Result(s)

Vendors can update the information within PASSPort as part of a Change Request. Examples included adding new Subcontractors or replacing an existing subcontractor. Note: Change requests can only be initiated following Contract Registration.

## 3.7 LL34 Compliance Tab

The LL34 Compliance tab allows you to complete all Doing Business Data information within PASSPort. Local Law 34 of 2007 (LL 34) is New York City's campaign finance law that limits municipal campaign contributions from principal officers, owners, and senior managers of entities doing business with the City.

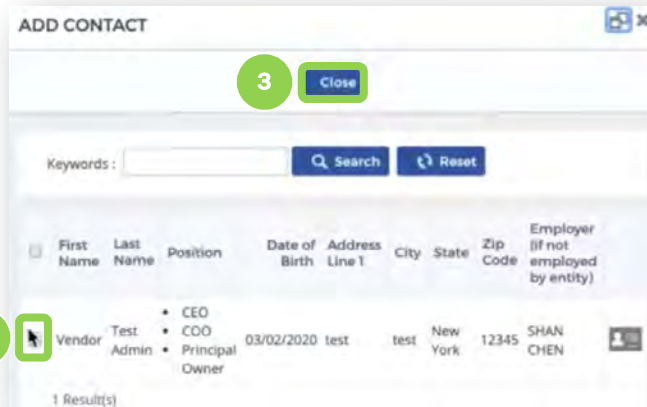
The LL34 Compliance tab in the Contracts module provides information on your organization's leadership, such as Principal Officers and Owners, which is carried over from the RFx. You are also required to identify a Senior Manager as part of this tab. The LL34 contact titles are necessary for completion of this section in PASSPort.

The screenshot displays the LL34 Compliance tab interface. On the left is a blue sidebar with navigation items: Overview, Header, Setup Team, Sites, Documents, Subcontractors, and LL34 Compliance. The main content area is titled 'PRINCIPAL OFFICERS' and contains an 'Excluded Officers' checkbox, which is highlighted with a green box and a green circle containing the number '1'. To the right of this checkbox are three dropdown menus for roles: CEO, CFO, and COO. Below this section is the 'PRINCIPAL OWNERS' section, which includes a message: 'There are no listed owner(s) because (select one):' followed by four radio button options: 'The entity is not for profit', 'The entity is an individual', 'No individual or organization owns more than 10% of the entity', and 'Other'. Below these options are fields for 'Individual Owners' and 'Organization Owners', and an 'Add an Organization' button. At the bottom, there is a search bar with '0 Result(s)' displayed.

The LL34 Compliance tab effectively replaces the Doing Business Data Form; this subtab lists Principal Officers and Principal Owners.

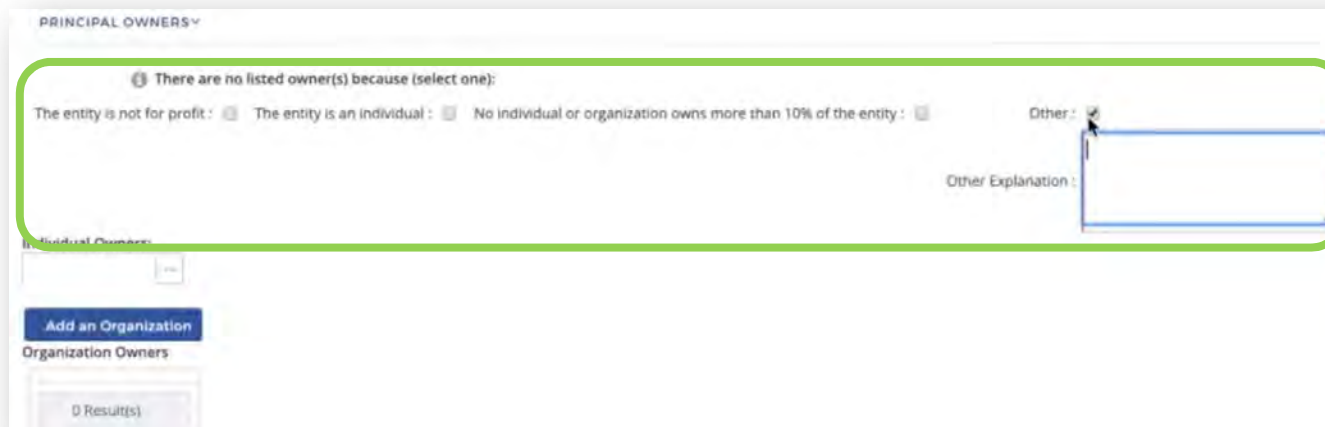
Within the Principal Officers tile, you can **exclude** officers by selecting the checkbox next to the role.

1. To add a contact and assign them a role, click the ellipsis.



Upon clicking the ellipsis, a **Add Contact** window will appear displaying a list of your organization's users.

2. Select the relevant contact.
3. Click the “Close” button.



If there are no listed owners for your organization or your entity is a non for profit, please select the appropriate response option.

If selecting “Other,” a dialog box will appear, and an explanation needs to be entered.

PRINCIPAL OWNERS

There are no listed owner(s) because (select one):

The entity is not for profit:  The entity is an individual:  No individual or organization owns more than 10% of the entity:  Other:

Other Explanation:

Individual Owners:

Add an Organization

Organization Owners

0 Result(s)

To identify one or more owners, type their name into the **Individual Owners** box.

3

Individual Owners:

First Name	Title	Last Name	Zip Code	City	Employer (if not employed by entity)	Address Line 1	Date of Birth
Vendor	CTO	Test Admin	12345	test	SHAN CHEN	test	12/20/2019

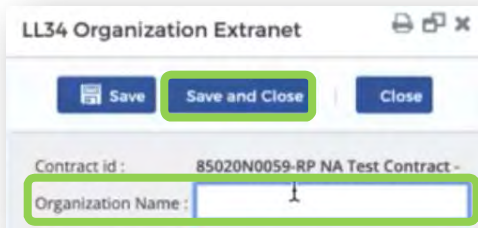
Selecting their name brings the contact into this project as an owner.

Add an Organization

Organization Owners

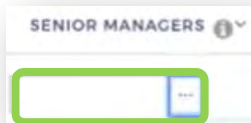
0 Result(s)

To **Add an Organization**, click the corresponding button.



Within the LL34 Organization Extranet popup, type in the Organization Name.

Click **“Save and Close.”**



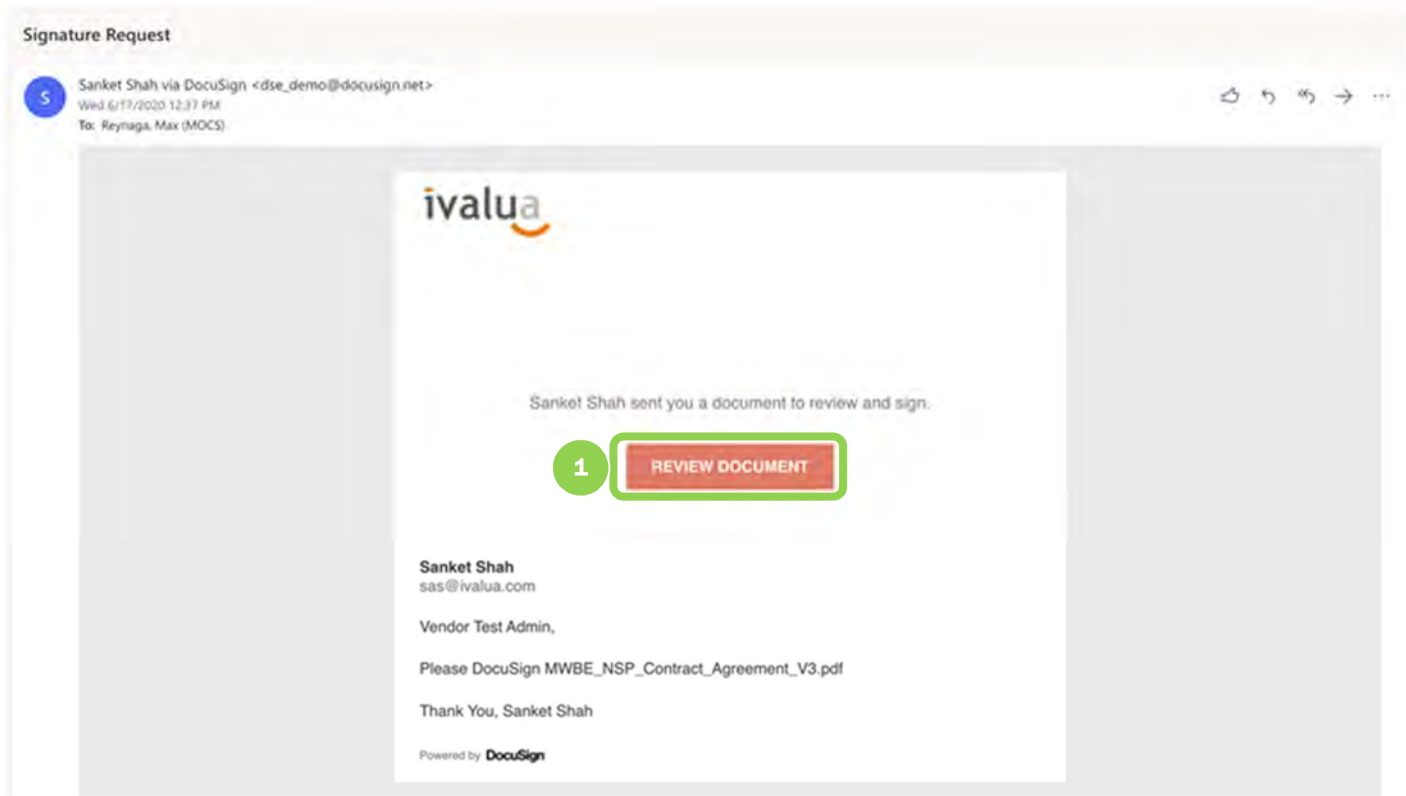
The final section is the Senior Managers tile.

To add in a Senior Manager, type in the contact's name.

**Note:** *at least one Senior Manager must be selected.*

## 4. Completing Organization Signature

This section outlines the process in which Vendor Contract Signatories will use DocuSign to create a signature or initials for completed authoring documents. This includes accessing DocuSign, editing the signature properties, and applying the signature. The steps below highlight this process. Additionally, a short video has been developed to outline the process.



1. Click **“Finish.”**

The agency will kick-off the E-signature task in PASSPort.

The designated **Vendor Contract Signatory** selected by your organization at the point of final review will receive an **email notification** with a link to DocuSign. *Here is a sample notification.*

1. Click **“Review Document.”**

Please Review & Act on These Documents

Sanket Shah  
Ivalua

ivalua  
Present to DocuSign

2

Please read the **Electronic Record and Signature Disclosure**  
 I agree to use electronic records and signatures.

3

CONTINUE OTHER ACTIONS

section of the Documents tab of the PASSPort record titled #1620P0008-HHS Organizational Development Consulting Services.

1. Appendix A - Jul 21 2020 5:52PM
2. Human Services Performance Based Contract - Jul 21 2020 5:51PM
3. Order of Preference - Jul 21 2020 5:53PM
4. Vendor Proposal - Jul 21 2020 6:07PM

The order of precedence of the above documents is included within the Contract Documents. These documents, together with this signature page, represent the entire Contract.

Each party is signing this contract electronically on the date noted in this party's electronic signature.

The City of New York  
By: DEPARTMENT OF HEALTH AND MENTAL HYGIENE  
Agency Contract Signatory

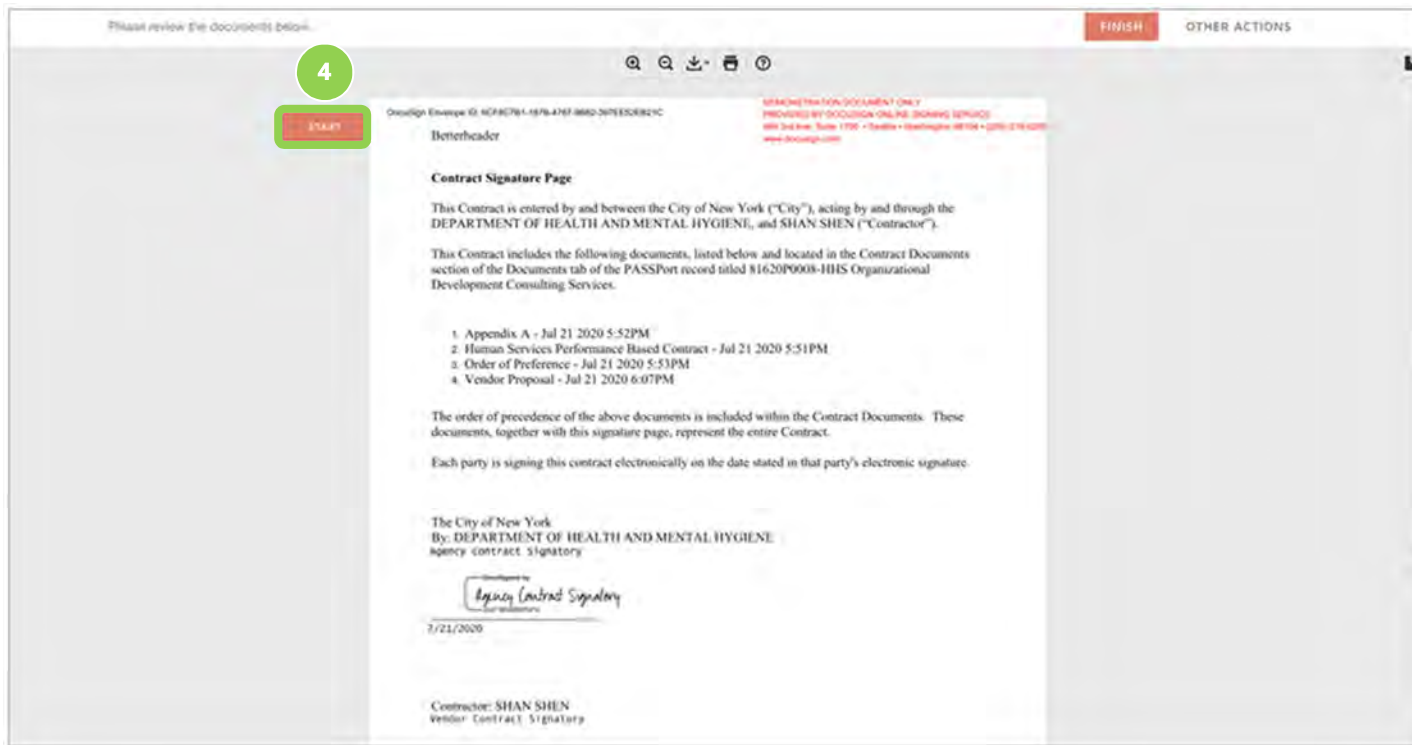
*Agency Contract Signatory*  
7/21/2020

Contractor: SHUN MIEN  
Senior Contract Signatory

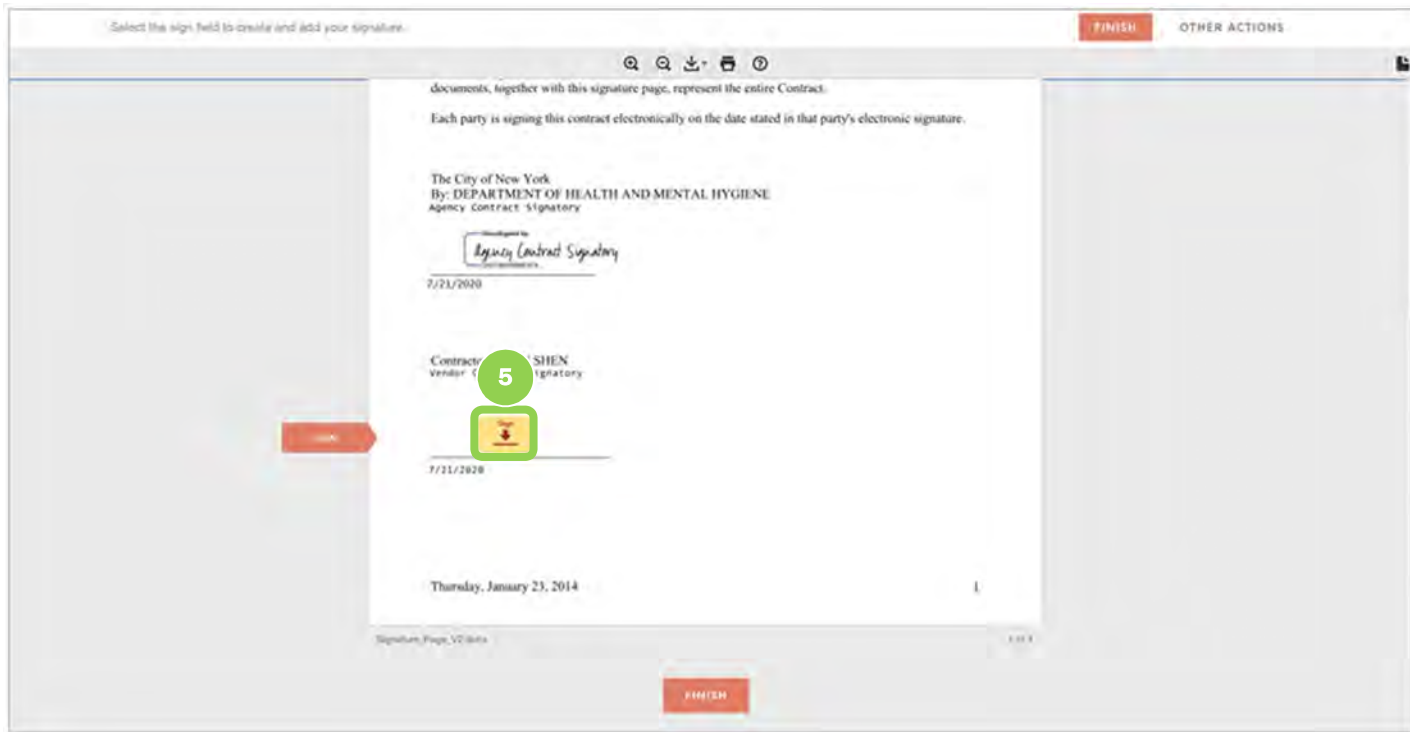
*Shun Mien*  
7/21/2020

2. After reading and agreeing to the disclosure, click the **checkbox** to confirm “I agree to use electronic records and signatures.”
3. Click “Continue.”

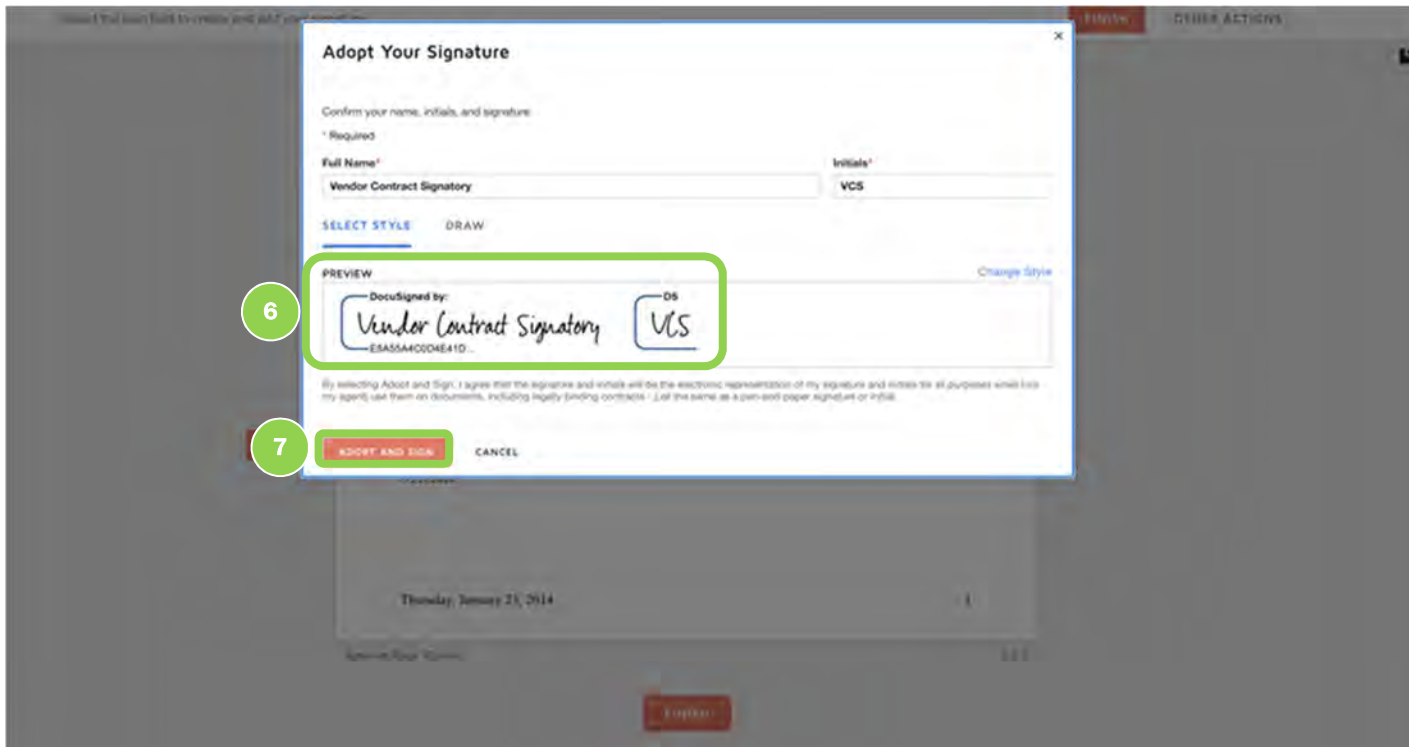




4. Review the document and click "START" to start the signature process.



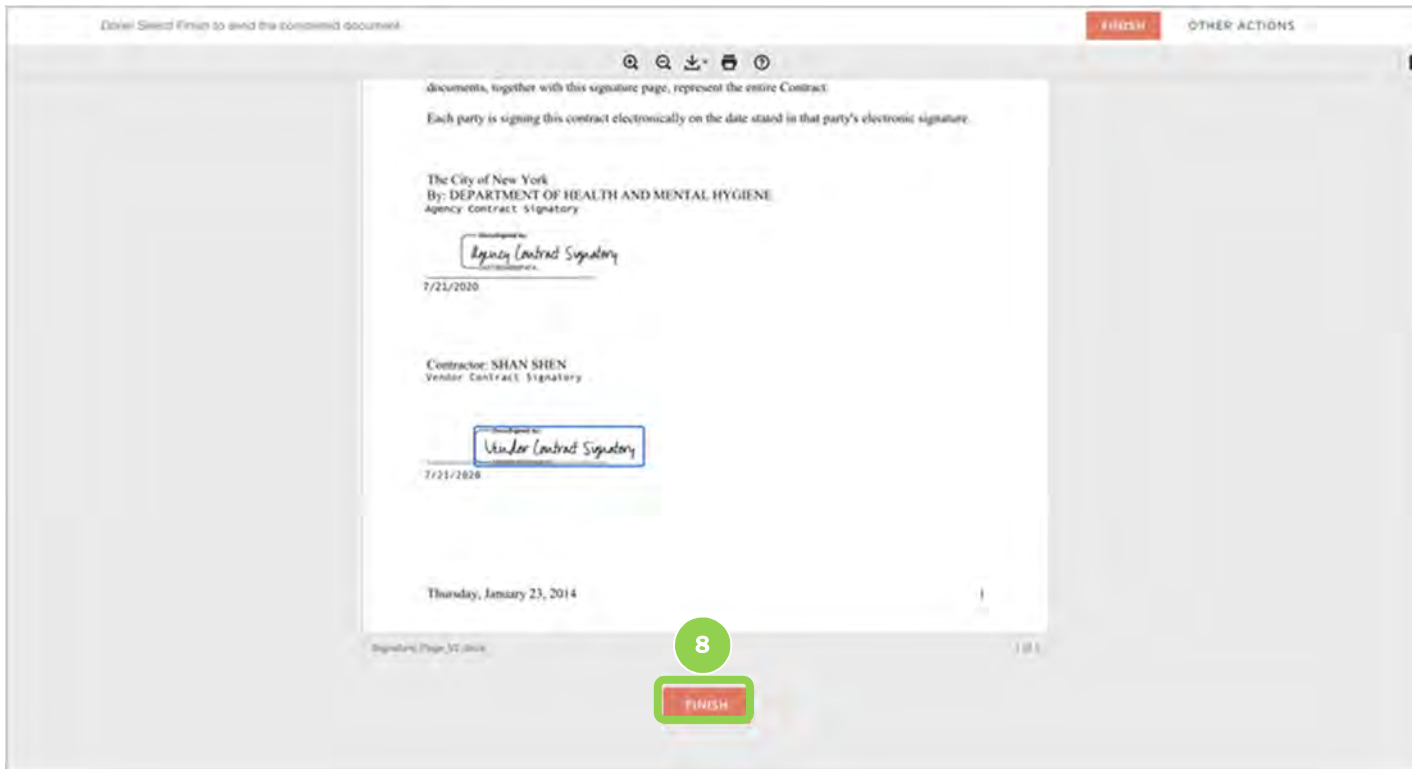
5. DocuSign will take the Vendor Contract Signatory to the section where the signature will be applied. Click the yellow "SIGN" button.



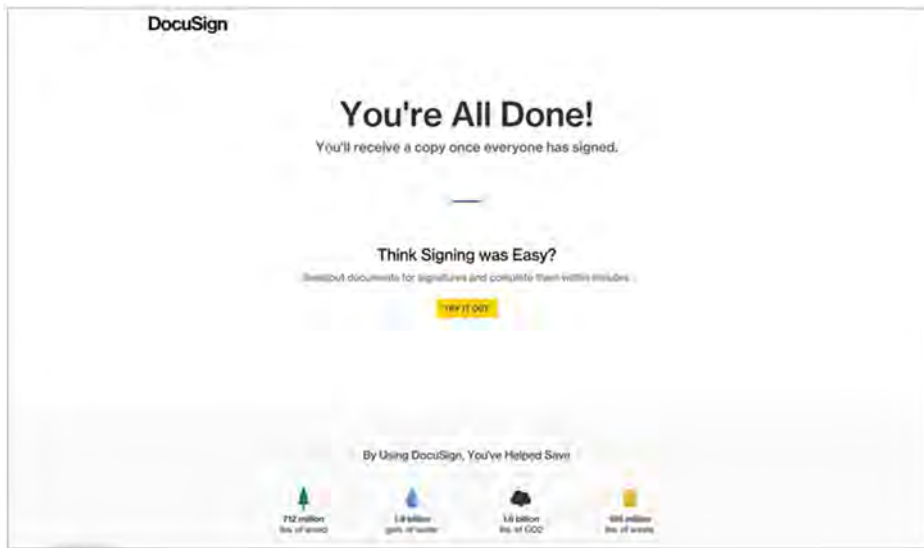
6. In the popup window, **preview** the signature.

**Note:** To change a Signature, click into the Full Name and/or Initials fields and overwrite its content.

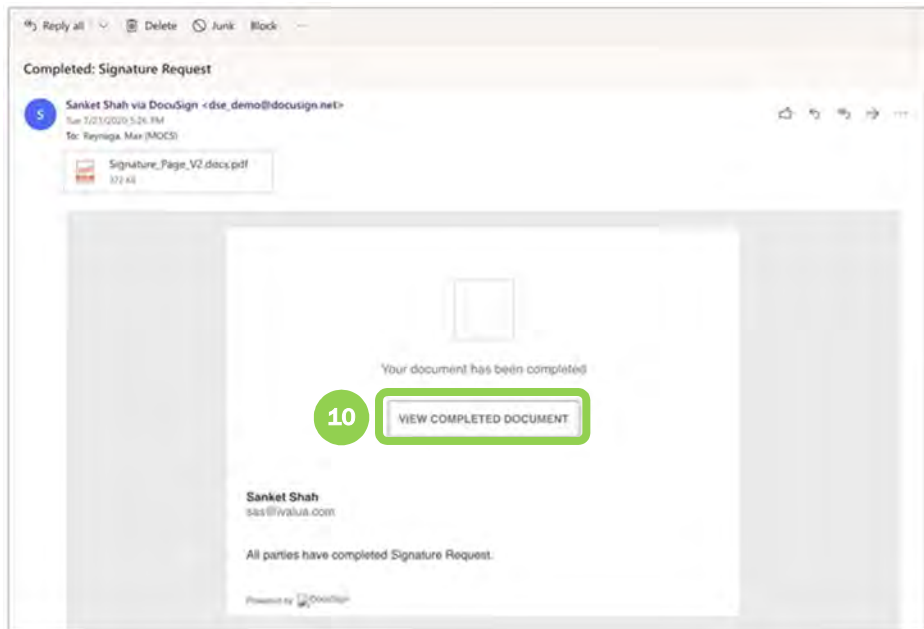
7. When ready to proceed, click the “ADOPT AND SIGN” button.



8. The signature now appears in the document. To complete the signature process, click "FINISH."



9. DocuSign will display a “You’re All Done!” message, indicating that the signature task been completed successfully.



10. Once the document has been signed by all parties, DocuSign will send out a “Completed: Signature Request” email notification. The email will have the document pdf attached and also include a link to “View the Completed Document.”

## 5. Registration

Your organization will receive an automatic email notification from PASSPort when your contract has been registered. Registration will be confirmed in PASSPort and you will have the ability to take post-registration actions.

Dear {\$contact\_firstname} {\$contact\_lastname},

PASSPort Notification: Contract Registered

Your contract {object\_label} has been registered [Click here to view {url}](#).

If you have subcontracts but have not yet identified the vendor, please do so through the above link.

Regards,

The PASSPort Team  
Mayor's Office of Contract Services (MOCS)

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This is an automated message; please do not reply to this email. If you have any questions or need assistance, please reach out to MOCS at [help@mocs.nyc.gov](mailto:help@mocs.nyc.gov).