How to Search for Your Payments in PIP

The PIP website enables City vendors to manage their account information, and view their City of New York financial transactions and1099 forms. Use this guide to research scheduled payments or details about issued checks or EFT payments. Terms you will encounter in PIP are defined on the last page.

To access your vendor account information, you must be enrolled in PIP. If you have not already enrolled, please follow the instructions for existing vendors in the Activation Quick Start Guide for New/Existing Vendor on the PIP homepage.

Access PIP at www.nyc.gov/PIP and log in with your User ID and Password.
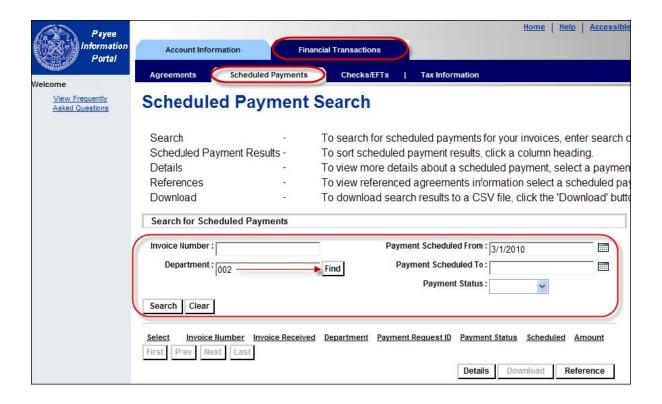
LOOKING UP SCHEDULED PAYMENTS

After logging into PIP, the *Scheduled Payment Search* page enables you to see if a payment for your invoice is scheduled to be disbursed.

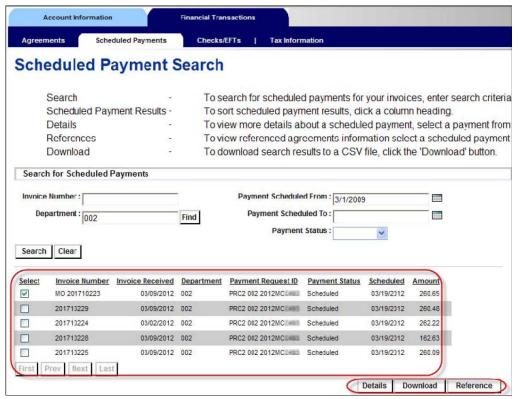**Step 1:** Click the **Financial Transactions** tab, and then the **Scheduled Payments** tab.

Step 2: Enter search criteria (or leave fields blank to return a list of all your scheduled payments). *Any combination of Invoice Number, Department, Payment Status or Scheduled Date Range fields is allowed.*
Note: Department is a numeric code in FMS. Click the **Find** button to search for Department by name.

Step 3: Click **Search**.

The results of your search are displayed in a list at the bottom of the page. There are a number of actions you can perform with the results, as described on the next page.
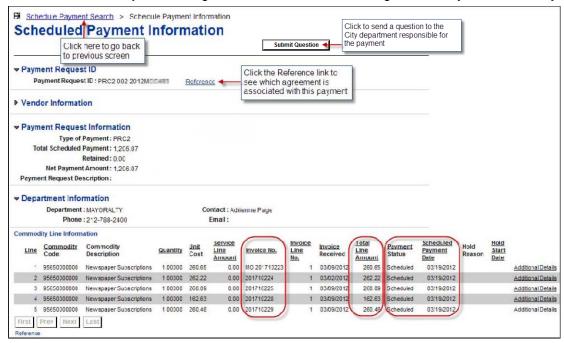
There are 2 actions you can perform with the entire results list:
- **Sort** the list by clicking on an underlined column heading.
- **Download** the results list into Excel by clicking the *Download* button.

Select a Checkbox to choose a Check/EFT Number, and then click one of these buttons:
- **Details** takes you to additional information about the payment request on the *Scheduled Payment Information* page.
- **Reference** takes you to the agreement on the *Referenced Agreements by Scheduled Payment* page.

To send an inquiry to the department involved with the transaction, click the **Submit Question** button.
Additional Details link provides more information about the invoice line that is being paid.
Go back to the previous page by clicking the *Scheduled Payment Search* link at the top of the page.

The *Referenced Agreements by Scheduled Payment* page displays the agreement details referenced by the payment, accessed through the **Reference** link on the previous page.
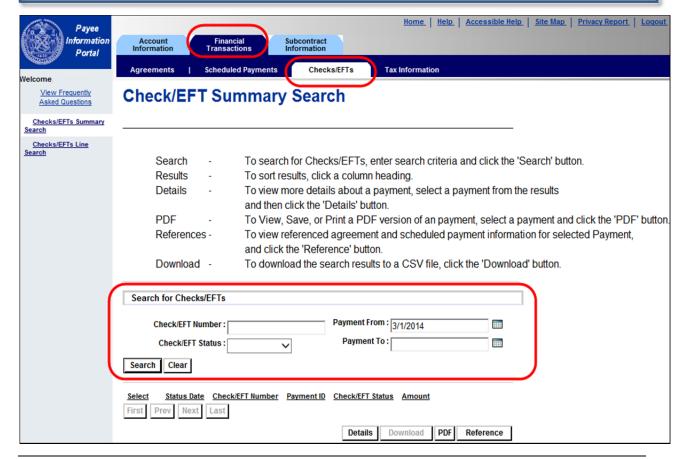

Return to a previous page by clicking an underlined blue link at the top of the page.

LOOKING UP ISSUED PAYMENTS

The *Check/EFT Summary Search* page enables you to view, download, and print disbursement details. NOTE: Payment information for the past 5 years is available in PIP, as indicated by the **Payment From** date. If you need older transaction details, contact the City department you did business with directly.

Step 1: Click the **Financial Transactions** tab, and then the **Check/EFTs** tab.

Step 2: Enter search criteria, then click **Search**. *You may enter a 15-digit Check/EFT Number, Check/EFT Status, or Payment date range.*

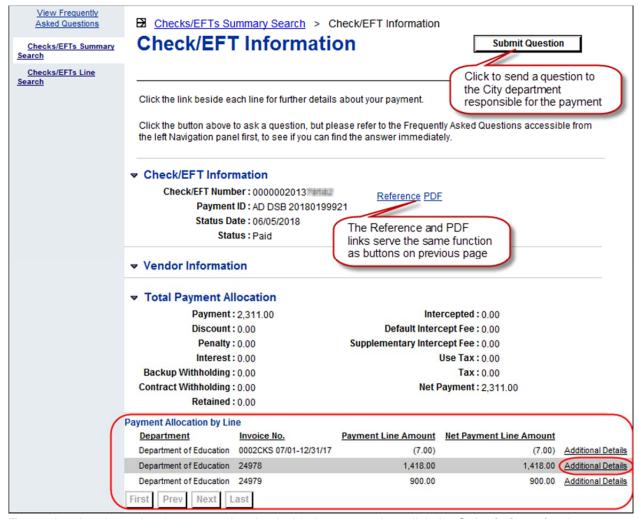The results of your search are displayed in a list at the bottom of the page. There are 2 actions you can perform with the results list:
- **Sort** the list by clicking on an underlined column heading.
- **Download** the results list into Excel by clicking the *Download* button.

Select a Checkbox to choose a Check/EFT Number, and then click one of these buttons to view more information. You can only select one check/EFT at a time.
- **Details** takes you to additional information about the issued payment on the *Check/EFT Information* page.
- **PDF** enables you to view, save or print a PDF copy of the check/EFT details. Note: The Date on the lower left of the PDF is the disbursement date.
- **Reference** takes you to the *Referenced Agreement by Check/EFT* page with information about the agreement that was paid on the selected check/EFT.

To send an inquiry to the department involved with the transaction, click the **Submit Question** button.
At the bottom of the page, the line details from the disbursed check/EFT are displayed.

- **Additional Details** takes you to the *Line Details* page, with information about the Department contact phone, your invoice, and the PO or Contract that was paid.

To send an inquiry to the department involved with the transaction, click the **Submit Question** button.
Return to the previous page by clicking an underlined blue link at the top of the page.

The *Referenced Agreements by Check/EFT* page is displayed when you click the **Reference** button or link.

↩ Checks/EFTs Summary Search > Referenced Agreements by Check/EFT

Referenced Agreements by Check/EFT

This page displays agreement information related to the Check/EFT selected. Click 'Details' link to view more infomation about the related transaction.

▼ **Check/EFT Details**

Check/EFT Number : 0000002013█████
Payment ID : AD DSB 20180199921
Check/EFT Amount : 2,311.00
Check/EFT Date : 05/29/2018   View Details

Agreement

Agreement ID	Tracking Number	Transaction Date	Not to Exceed Amount	Encumbered	Expended	Retained	Outstanding	Agreement Held?	Closed?	
POC 040 20183082615	20	04/18/2018	900.00	900.00	900.00	0.00	0.00	No	Yes	Details
POC 040 20183082652	20	04/18/2018	1,418.00	1,418.00	1,418.00	0.00	0.00	No	Yes	Details

First | Prev | Next | Last

Return to the previous page by clicking the *Checks/EFTs Summary Search* link at the top of the page.
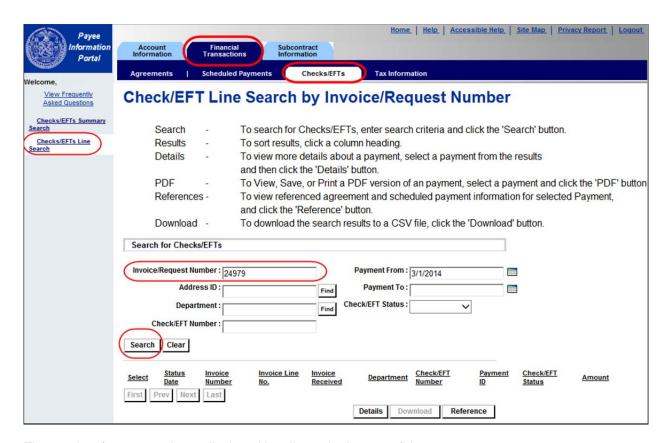
LOOKING UP DISBURSED PAYMENTS BY INVOICE NUMBER

Step 1: Click the **Financial Transactions** tab, and the **Check/EFTs** tab.
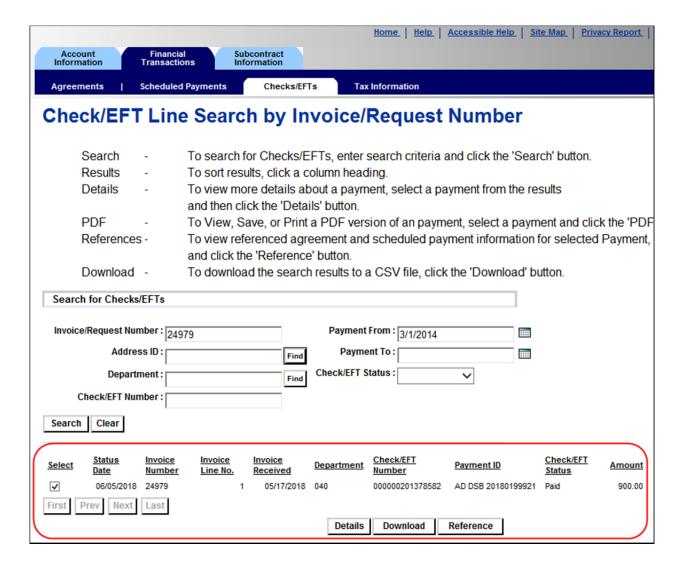
Step 2: Click the **Checks/EFTs Line Search** link on the left.

Step 3: Enter **Invoice/Request Number**, and then click **Search.** You can also search by entering any one or more of the other fields:

- Payment date range – Note: the search goes back 5 years in PIP. If you need older transactions, contact the City department you did business with directly.
- Address ID – To find payments directed to a particular address, if you have more than one.
- City Department – To find payments from specific City Departments.
- Check/EFT Number – enter the 15-digit number to see details about one payment.
- Check/EFT Status – select to filter only Disbursed or Paid.

The results of your search are displayed in a list at the bottom of the page.

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There are 2 actions you can perform with the results list:
- **Sort** the list by clicking on an underlined column heading.
- **Download** the results list into Excel by clicking the *Download* button.

Select a Checkbox to choose a line, and then click one of these buttons to view more information. You can only select one line at a time.
- **Details** takes you to additional information about the payment request on the *Check/EFT Information* page.
- **Reference** takes you to information about the agreement that was paid on the *Referenced Agreements by Check/EFT* page.

How to Search for Your Payments in PIP

You may encounter the following terms in PIP. Knowing what they mean will help you better understand the details of financial transactions from the City's Financial Management System (FMS)

Department	A NYC agency or organization you do business with.
Payee / Vendor	An entity or an individual that receives payment from FMS, and which will be referred to as vendor throughout the rest of this document.
Vendor Code	A unique 10 character ID assigned to each vendor in FMS.
Agreement	A legal document by which you are to provide goods or services to NYC, *e.g., contract, CT, purchase order, POC; or a delivery order, DO1.*
Payment Request	A City financial system record that documents payment authorization details, e.g., *PRC2, PRN2, PRM1* document codes.
EFT	Electronic Fund Transfer is a method for directly depositing payments from FMS into the bank account the vendor has designated. Vendors can enroll for EFT in PIP.
Invoice Line Amount	Refers to the dollar amount on individual lines on your invoice, *e.g., Line 1 - $980, Line 2 – $2500.*
Payment Status	Represents the stage of a Payment Request. The following terms are displayed: • ***Scheduled*** - Payment Request that is now awaiting disbursement of a check or EFT. • ***Held*** - A Payment has been put on hold by the issuing department, Comptroller's Office, or Department of Finance. *For steps to search for scheduled or held payments, refer to the <u>Looking Up Scheduled Payments</u> section of this guide.*

Check/EFT Status	Represents the stage of an issued Check/EFT. The following terms are displayed:
	• ***Disbursed*** - The City has issued funds (EFT or check) to a vendor.
	   Banks may take up to 2 days to process EFT payments.
	• ***Cancelled*** - The disbursement was cancelled by request of the vendor or City department.
	• ***Paid*** - A payment to a vendor has cleared the bank.
	   Keep in mind that the paid status for EFT may be up to 40 days after a disbursement date. Your bank statement will reflect the funds available date.
	For steps to search for issued payments, refer to the <u>Looking Up Issued Payments</u> section of this guide.

Status Date	Indicates the date of the latest Check/EFT Status. For example, when a paper check or EFT is issued, the initial status is marked "Disbursed", and the Status Date shown is the disbursement date. *The Status Date is updated when the Check/EFT status changes to Paid or Cancelled.*
Submit Question	The Submit Question button in the upper right of the following pages enables you to enter a question and if needed, change your email address or phone number for the reply. The question is then sent to the agency responsible for the transaction. • Scheduled Payment Information • Check/EFT Information • Check/EFT Information – Line Details

Please direct questions about your payments to the City Department that issued them by utilizing the Submit Question buttons on the Check/EFT Information and Line Details pages.