Follow the steps below to activate a vendor account in the Payee Information Portal (PIP) at www.nyc.gov/pip

*If you need details with screen shots of these steps, see the full Guide starting on page 2.*

1. Open the PIP home page, www.nyc.gov/pip and click the "Activate" button.
2. Read the Terms and Conditions for using the PIP website and click the "Accept Terms" button.
3. Read the PIP Activation Guidelines and click the "Next" button.
4. Search in PIP to determine whether a vendor account already exists in the system for your business. If you have done business with the City of New York, or requested to be put on the City's bid solicitation list, your account may already exist.

<table>
<thead>
<tr>
<th>If your account is found, see Section 1: Activating an Existing Vendor Account, screenshots on pages 4 - 8 of this guide:</th>
<th>If you are activating a New vendor account, see Section 2: Activating a New Vendor Account, screenshots on pages 9 - 18 of this guide:</th>
</tr>
</thead>
<tbody>
<tr>
<td>5. Enter an amount paid with the 15-digit Check/EFT Number from a NYC Check stub or your bank account statement; or a Contract or Purchase Order Document ID; or a Security Activation Code obtained from <a href="mailto:PIP@fisa-opa.nyc.gov">PIP@fisa-opa.nyc.gov</a>.</td>
<td>5. Create a User ID and Password and enter your Email address.</td>
</tr>
<tr>
<td>6. Create a User ID and password and enter your Email address.</td>
<td>6. Select Security Questions and answer them.</td>
</tr>
<tr>
<td>7. Select Security Questions and answer them.</td>
<td>7. Click the link in the Email you receive from PIP to continue the activation process.</td>
</tr>
<tr>
<td>8. Click the link in the Email you receive from PIP to continue the activation process.</td>
<td></td>
</tr>
<tr>
<td>9. Log in using the User ID and Password you established.</td>
<td>9. Determine whether you are activating as an Individual or Company, then enter a valid TIN number and any other required business information.</td>
</tr>
<tr>
<td>10. Click the <strong>Submit Activation</strong> button to complete the activation process.</td>
<td>10. Provide your address(es) and contact information.</td>
</tr>
<tr>
<td><strong>Note:</strong> If you would like to be solicited by NYC to bid on contracts, you can manage the commodity codes and self-identified business types that you have on file with the City of New York. Please create an account with the City’s Procurement and Sourcing Solutions Portal (PASSPort) with your existing vendor code, and select all relevant commodity codes. Learn more at <a href="http://www.nyc.gov/passport">www.nyc.gov/passport</a></td>
<td>11. From the “Activation Summary” page, click <strong>Submit Activation.</strong></td>
</tr>
<tr>
<td>12. Review the Substitute W-9 Certification form. Then electronically sign and submit it.</td>
<td><strong>Note:</strong> If you would like to be solicited by NYC to bid on contracts, you can manage the commodity codes and self-identified business types that you have on file with the City of New York. Please create an account with the City’s Procurement and Sourcing Solutions Portal (PASSPort) with the vendor code created in PIP, and select all relevant commodity codes. Learn more at <a href="http://www.nyc.gov/passport">www.nyc.gov/passport</a></td>
</tr>
</tbody>
</table>
This guide provides the steps you need to set up an account and activate online access for the vendor self-service portal, the Payee Information Portal (PIP), for existing and new City of New York vendors. After performing a name search, you will determine if you already have an existing Vendor Code.

- If you have an **existing** vendor code from the City of New York and want to activate your online account access, please follow the instructions below for **EXISTING VENDOR**. (If you cannot activate your account, contact the City of New York at PIP@fisa-opa.nyc.gov.)

- If you are a **new** vendor interested in doing business with the City of New York and need to create a new vendor code and PIP online account, please follow the instructions on pages 2-3. Then skip to page 9 for the **NEW VENDOR** instructions.

**NOTE** – If you are a non-United States business entity and any of the following apply to you:
- you possess a Taxpayer Identification Number from a country other than the United States
- you do not have a United States based Taxpayer Identification number (i.e. EIN)
- your corporate headquarters are located outside the United States
- your business has a satellite or sales office in the United States but your tax home is in another country; and/or
- you are not sure of your status as a United States or foreign business entity.

Do Not continue on the PIP website to create a new vendor account. Instead, please send an Email inquiry to: 1042vendor@comptroller.nyc.gov for further instructions.

1. Click the **Activate** button to initiate activation. All vendors must begin the process with a search.
2. Read the Terms and Conditions page and click the **Accept Terms** button.

3. Review the PIP Activation Guidelines page and click the **Next** button.

4. Determine your search – *Company* or *Individual*, then do one of the following:
   a. In the Company Search section, enter your organization’s **Taxpayer Identification Number (TIN) or Legal Business Name**; OR
   b. In the Individual section, search by your **Last Name and Last 4 digits of your SSN** (Social Security Number).
   
   **NOTE:** You can enter part of your legal name which PIP surrounds with the wildcard (*) to find any part of the name. For instance, enter *training solution* for Computer Training Solutions Inc, or *Carpenter* for Amelia Carpenter. **DO NOT ENTER THE DBA NAME** (Doing Business As).

5. Click the **Search** button in the search section you entered.

- If results are displayed for your account, continue to **Section 1 on the next page to Activate an EXISTING Vendor Account** that already has a vendor code.
- If you did not find your account and you believe you have one, please try again. Read the hints on the screen for searching by a partial name, using the wildcard (*) to help with your search. Contact the City of New York at [PIP@fisa-opa.nyc.gov](mailto:PIP@fisa-opa.nyc.gov) if you need assistance.
- If you did not find your account and you are a **new** vendor wanting to conduct business with the City of New York, skip to **page 9, Section 2 to Activate a NEW Vendor Account** and obtain a vendor code.
SECTION 1: ACTIVATING an EXISTING VENDOR (an Existing Account was found)

Step 1.1: On the Results Found page, find your Legal Business Name in the search results. Click the link next to it to continue. There are different actions you can take – see the explanations below.

<table>
<thead>
<tr>
<th>If You See This Link Next To Your Legal Business Name</th>
<th>WHAT IT MEANS / Action You Can Take</th>
</tr>
</thead>
</table>
| Click here to activate your account | You do business with the City and have a Vendor Number (code), but the account is not activated in PIP. Click this link to activate it. You need ONE of the following to continue:  
  - A NYC Check/EFT number and amount (from a check stub or your bank account statement).  
  - Contract or Purchase Order 3-part Document ID (Can be requested from the payment-issuing agency).  
  - Security Activation Code that you received from the PIP Helpdesk. |
| Contact your Administrator | The account was previously activated using PIP. Click the link to display the name of the account administrator at your business. Contact this individual to receive your own User ID and Password. |
| Click to Continue Activation | The activation process was not completed. Click this link to complete activation. You need to enter your User ID and Password. If you do not have them, contact the PIP Helpdesk at 212-857-1777 or PIP@fisa-opa.nyc.gov for assistance. |
Step 1.2: On the Account Verification page, verify your account by selecting **one** of the 3 options and entering:

- an existing Check/EFT number and amount; OR
- a Contract or Purchase Order Doc ID; OR
- an Activation Code you received from the PIP Helpdesk.

Step 1.3: Click the **Next** button.
Step 1.4: On the My User Information page, enter information into the required fields marked with a red asterisk to identify yourself and your chosen password. The User ID and Password are both case sensitive.

Step 1.5: In the “Security Questions” section, select five questions and provide answers to each. When you request to reset your password, the answers will be used to validate the request. Remember to note for your own records your chosen User ID, Password, and the answers to your five selected Security Questions.
Step 1.6: On the Verify Email Address page, click Next. An Email will be sent to the Email address you entered.

Step 1.7: On the Thank You page, click Close Browser to exit PIP.

Step 1.8: Open the verification Email and click the link to continue the activation process.

You will be taken to a PIP login page. (If you don’t receive an Email from PIP, check your spam folder or contact PIP@fisa-opa.nyc.gov.)

Step 1.9: Enter your User ID and Password and click Login.

- Note: Do not bookmark this page. You will be logging in from the PIP Home Page once you activate your account.

Step 1.10: Click Submit Activation to complete the activation.
The Activation Process is complete. Save your Vendor Code for future reference.

**Step 1.11:** Click the login link to enroll in EFT (Direct Deposit) for future payments from the financial system, using your User ID and Password.

YOU COMPLETED THE ACTIVATION FOR AN EXISTING VENDOR. SKIP THE REST OF THIS DOCUMENT.
SECTION 2: NEW VENDOR (Results not found in Search for Existing Account)

Please note the instructions for Non-US business entities: If you are a foreign vendor, you cannot use PIP to create a new Vendor Account with the City. Definitions of a “foreign vendor” are listed at the top of the Search Results page.

Step 2.1: Click the link near the bottom of the page to begin setting up a new vendor account code.
**Step 2.2:** On the My User Information page, enter information into the required fields marked with a red asterisk to identify yourself and your chosen password. The User ID and Password are both case sensitive.

**Step 2.3:** In the “Security Questions” section, select five questions and provide answers to each. When you request to reset your password, the answers will be used to validate the request. Remember to note for your own records your chosen User ID, Password, and the answers to your five selected Security Questions.

**Step 2.4:** On the Verify Email Address page, click **Next**. An Email will be sent to the Email address you entered.

**Step 2.5:** On the Thank You page, click **Close Browser** to exit PIP.
Step 2.6: Open the verification Email and click the link. It will take you to a PIP login page.
(If you don’t receive an Email from PIP, check your spam folder or contact PIP@fisa-opa.nyc.gov.)

Step 2.7: Enter your User ID and Password and click Login.
Note: Do not bookmark this page. You will be logging in from the PIP Home Page once you activate your account.
Step 2.8: Select the TIN Type.
Note: If you select Social Security Number, be sure to select SSN, ITIN, or ATIN.

Step 2.9: Select the classification that applies to your particular business entity.
Note: The Classification list changes, based on the TIN Type you select.
Then click Next.
Section 2: Activating a **NEW** Vendor Account

**Step 2.10:** Most of the fields on the My Business Information page will be pre-populated with the answers you submitted. Only required fields (*) are necessary, but you should enter any other applicable information. Then click **Next**. The postal address is verified against current postal codes. Click **Next** again.
Step 2.11: On the Address Information Questionnaire page, indicate whether the legal address entered on the previous page will be used for the types of transactions you might have with the City: an address for Administrative correspondence, an address for Ordering from you, an address for Payment to you, and an address for Billing to you. You can specify the same or a different address for each of these address types.

An explanation of the Address Questions:

A: If your Legal address is the same address as any one of the additional 4 address types (Administrative, Ordering, Payment, Billing), choose “Yes” on A. Otherwise, choose “No”.

B: If you chose “Yes” or “No” on A above and your Administrative, Ordering, Payment, and Billing addresses are all the same address, choose “Yes” on B. Otherwise, choose “No”.

C: To designate a single contact person for all 4 address types, choose “Yes” on C. Otherwise, choose “No”.
Step 2.12: On the Addresses and Contacts page, the Address information is copied from the Legal (1099) Address based on the answers you provided on the Questionnaire page. If you answered “Yes” to all the previous questions, the example below shows the Address and Contact information you entered. You can change addresses here, if needed.

Enter the **Phone Number**.

Step 2.13: In the Contact Information section, enter the **Principal Contact, Phone** and **Email** address.

Click **Next**.
Step 2.14: The Activation Summary page shows the Account, Business, Address and Contact information you entered. Review all the information and use the Update Information links to go back and change information if necessary.

Once you determine that the information is correct, select the Submit Activation button.
Step 2.15: The *Substitute W-9* form appears and is pre-populated with the information you entered. Review all the information and follow these steps to electronically sign and submit the Substitute W-9:

- Select **I Agree**
- Enter your **PIP Password**
- Click the **Sign** button.

Note: If any information needs to be changed, click the **Back** button to return to previous screens to update them.
Step 2.16: The Activation Process is complete. Save your Vendor Code for future reference. Click the links under Downloadable Forms to print or save the Substitute W-9 or PIP Activation Report.

Step 2.17: Click the login link to enroll in EFT (Direct Deposit) for future payments from the financial system, using your User ID and Password.

For additional assistance contact the PIP Helpdesk at PIP@fisa-opa.nyc.gov or 212-857-1777.