# Subcontractor Information QuikGuide

The Payee Information Portal (PIP) is a service that allows you, as a payee/vendor for the City of New York, to manage your own account information, view your financial transactions with the City and much more. This PIP QuikGuide is provided as an "at a glance" tool that summarizes the steps to follow to meet the reporting requirements in PIP.

## LOCATING AND UPDATING CONTRACTS

### TO VIEW AND COMPLETE ALL CRITICAL ACTIVITIES ASSOCIATED WITH SUBCONTRACTOR REPORTING FOR THE CITY OF NEW YORK

- Log into the PIP self-service website
- Click on the **Subcontract Information** tab
- On the *Subcontract Reporting – Items Pending My Review* page, all tasks associated with subcontract activity display. Click the links next to the tasks to complete them

### TO SEARCH FOR ALL CONTRACTS THAT NEED TO BE UPDATED AND DEFINE, FOR EACH CONTRACT, WHETHER THEY WILL OR WILL NOT HAVE SUBCONTRACTS

- Log into the PIP self-service website
- Click on the **Subcontract Information** tab
- Click the **Maintain Subcontracts** tab. The *View Contracts* page appears
- On the *View Contracts* page, click the Search button to display all of your eligible contracts
- Pending contracts appear at the top of the list, and are formatted in red font with a Subcontract Status of "Pending"
- Click the Update All button and all contracts with a "Pending" Subcontract Status display on a new page
- On the *Update All Pending Statuses* page, change the Subcontract Status to "Yes" or "No" and click the Save button
- The Subcontract Status field is updated and the contracts that have been marked "Yes" or "No" will no longer appear on the page

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## To Update the subcontract flag for a particular contract

- Log into the PIP self-service website
- Click on the **Subcontract Information** tab
- Click the **Maintain Subcontracts** tab. The *View Contracts* page appears
- On the *View Contracts* page, enter a unique identifier, such as **Contract ID:** or **PIN:**, and click the Search button. If you leave all the fields blank and click Search, all of your eligible contracts will display. By default, the **Registration Date:** is the only pre-filled field, but all fields can be edited to filter your search results
- Click the Update link, to the right of the line displaying the contract information. The *Update Status* page appears.
- On the *Update Status* page, change the Subcontract Status, using the drop-down menu, and click the Save button
- A red confirmation message will appear at the top of the page, including the Contract ID, stating your information has been changed successfully
- You can return to the *View Contracts* page using the link at the top of the screen

## To Research all of the status updates for a particular contract

- Log into the PIP self-service website
- Click on the **Subcontract Information** tab
- Click the **Maintain Subcontracts** tab. The *View Contracts* page appears
- On the *View Contracts* page, click the Search button to display all of your eligible contracts
- Click the View History link, to the right of the line displaying the contract information. The *Subcontract Status History* page appears
- This page lists, in reverse chronological order, all actions that were taken on the this contract
- To download this information into an Excel (.csv) format, click the Download button. A pop-up message appears, asking you to open or save the file. If you open the file, be sure to save it before closing Excel
- You can return to the *View Contracts* page using the link at the top of the screen

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## ADDING SUBCONTRACTS AND VIEWING APPROVALS

### TO ADD A SUBCONTRACT TO A CONTRACT

- Log into the PIP self-service website
- Click on the **Subcontract Information** tab
- Click the **Maintain Subcontracts** tab. The *View Contracts* page appears
- On the *View Contracts* page, click the Search button to display all of your eligible contracts
- Click the Manage Subcontracts link, to the right of the line displaying the contract information, to view or add a subcontract. The *Manage Subcontracts* page appears
- On the *Manage Subcontracts* page, scroll down, if necessary, and click the Add Subcontract button to add one or more subcontracts
- On the *Add Subcontract* page, click the Find button, to select your subcontractor
- On the *Search for Subcontractor* page, locate your subcontractor using their Name, ID Number or Zip Code
- Enter the search criteria and click either the Search All City Vendors button or the Search My Subcontract Vendors button. The subcontractor information displays at the bottom of the page
- Once you have located your subcontractor, click the Select Vendor link, to the right of their information, and you will be automatically returned to the *Add Subcontract* page
- Back on the *Add Subcontract* page, enter the subcontract information and click the Submit button to send the subcontract for review and approval
- The required fields are:
  - **Subcontract Description:**
  - **Industry Classification:**
  - **Subcontract Start:** and **End Date:** and
  - **Subcontract Maximum Amount:**
- A red confirmation message will appear at the top of the page, including the assigned Subcontract ID, stating your subcontract has been submitted successfully

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| TO UPDATE A SUBCONTRACT IN DRAFT MODE AND SUBMIT IT FOR APPROVAL |
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- Log into the PIP self-service website
- Click on the **Subcontract Information** tab
- Click the **Maintain Subcontracts** tab. The *View Contracts* page appears
- On the *View Contracts* page, click the Search button to display all of your eligible contracts, or enter a unique identifier, such as **Contract ID:** or **PIN:**, and then click the Search button. Contract information displays at the bottom of the page
- Locate the appropriate contract and click the Manage Subcontracts link, to the right of the line displaying the contract information. The *Manage Subcontracts* page appears
- On the *Manage Subcontracts* page, all subcontracts associated with this contract display
- On the *Manage Subcontracts* page, first change the **Status:** to "Draft", to filter the results, and then click the Search button to see just the subcontracts that are saved but not submitted for approval
- Locate the appropriate subcontract and click the Update link, to the right of the line displaying the subcontract information. The *Update Subcontract* page appears
- On the *Update Subcontract* page, finalize the subcontract data and click the Submit button to send it for approval
- A red confirmation message will appear at the top of the page, including the assigned Subcontract ID, stating your subcontract has been submitted successfully
- You can return to the *View Contracts* page by clicking the **Maintain Subcontracts** tab again

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## To Delete a Subcontract

- Log into the PIP self-service website
- Click on the **Subcontract Information** tab
- Click the **Maintain Subcontracts** tab. The *View Contracts* page appears
- On the *View Contracts* page, click the Search button to display all your eligible contracts, or enter a unique identifier, such as **Contract ID:** or **PIN:**, and then click the Search button
- Locate the appropriate contract and click the Manage Subcontracts link, to the right of the line displaying the contract information. The *Manage Subcontracts* page appears
- On the *Manage Subcontracts* page, all subcontracts associated with this contract display
- Locate the appropriate subcontract and click the Update link, to the right of the line displaying the subcontract information. The *Update Subcontract* page appears
- On the bottom of the *Update Subcontract* page, click the Delete Subcontract button. A pop-up message appears, asking if you really want to delete this subcontract. Click OK
- A red confirmation message will appear at the top of the page, including the assigned Subcontract ID, stating that the subcontract has been deleted successfully

Note: Only subcontracts in “Draft” or “Rejected” status may be deleted. If you wish to delete a subcontract that is in another status, you can contact your agency representative and ask them to update the subcontract to reflect a “Rejected” status. You may then delete the subcontract using the steps outlined above.

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## To View the changes on a particular subcontract

- Log into the PIP self-service website
- Click on the **Subcontract Information** tab
- Click on the **Maintain Subcontracts** tab. The *View Contracts* page appears
- On the *View Contracts* page, enter a unique identifier, such as **Contract ID:** or **PIN:**, and then click the Search button
- Click the View History link, to the right of the line displaying the contract information. The *Subcontract Status History* page appears
- This page lists, in reverse chronological order, all actions that were taken on the subcontract
- To download this information into an Excel (.csv) format, click the Download button. A pop-up message appears, asking you to open or save the file. If you open the file, be sure to save it before closing Excel

## To Respond to a rejected subcontract

- Log into the PIP self-service website
- Click on the **Subcontract Information** tab
- On the *Subcontract Reporting – All Items Pending My Review* page, all contracts that have been rejected display in a separate section. Click the Manage Subcontracts link, to the right of the line displaying the contract information. The *Manage Subcontracts* page appears
- On the *Manage Subcontracts* page, all subcontracts associated with this contract display
- Locate the appropriate subcontract and click the Update link, to the right of the line displaying the subcontract information, to see reviewer comments
- If you have additional questions, contact your agency representative

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## Advanced Searching Techniques

- To locate all of your eligible contracts
  - Log into the PIP self-service website
  - Click on the **Subcontract Information** tab
  - Click the **Maintain Subcontracts** tab. The *View Contracts* page appears
  - On the *View Contracts* page, click the Search button
  - By default, the **Registration Date:** is the only pre-filled field, but all fields can be edited to filter your search results
- To locate a specific contract
  - Log into the PIP self-service website
  - Click on the **Subcontract Information** tab
  - Click the **Maintain Subcontracts** tab. The *View Contracts* page appears
  - On the *View Contracts* page, enter a unique identifier, such as **Contract ID:** or **PIN:**, and then click the Search button
- To locate all subcontracts that have been "Rejected" by The City
  - Log into the PIP self-service website
  - Click on the **Subcontract Information** tab. The *Subcontract Reporting* page appears
  - On the *Subcontract Reporting – All Items Pending My Review* page, all contracts that have been rejected display in a separate section. Click the Manage Subcontracts link, to the right of the line displaying the subcontract information. The *Manage Subcontracts* page appears
  - On the *Manage Subcontracts* page, all subcontracts associated with this contract display
  - On the *Manage Subcontracts* page, click the Update link, to the right of the line displaying the subcontract information, to see reviewer comments
- If your search results are unpredictable
  - Make sure that you have cleared out any search criteria that you entered

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## RECORDING SUBCONTRACTOR PAYMENTS

### TO RECORD A PAYMENT TO A SUBCONTRACTOR

- Log into the PIP self-service website
- Click on the **Subcontract Information** tab
- Click on the **Maintain Subcontracts** tab. The *View Contracts* page appears
- On the *View Contracts* page, enter a unique identifier, such as **Contract ID:** or **PIN:**, and then click the Search button
- The contract information displays at the bottom of the page
- Click the Manage Subcontracts link, to the right of the line displaying the contract information. The *Manage Subcontracts* page appears
- On the *Manage Subcontracts* page, all subcontracts associated with this contract display
- Locate the appropriate subcontract and click the Add Payments link, to the right of the line displaying the subcontract information. The *Add Payment* page appears
- On the *Add Payment* page, enter the payment information and click the Save button
- The required fields are:
  - **Subcontract Date of Payment:**
  - **Subcontract Payment Amount:**
  - **Subcontract Payment Description:** and
  - **Proof of Payment:**
- You will be returned to the *Manage Subcontracts* page, and the **Summary of Subcontract Payment Amount:** field, on this page, will update to reflect this payment
- A red confirmation message will appear at the top of the page, including the assigned Payment ID, stating your payment has been recorded successfully
- If there are multiple payments to record, use the Save & Add New Payment button instead of the Save button. This will refresh the *Add Payment* page instead, so you can immediately enter another payment

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| TO UPDATE AN EXISTING PAYMENT |
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| • Log into the PIP self-service website<br>• Click on the **Subcontract Information** tab<br>• Click on the **Maintain Subcontracts** tab. The *View Contracts* page appears<br>• On the *View Contracts* page, enter a unique identifier, such as **Contract ID:** or **PIN:**, and then click the Search button<br>• The contract information displays at the bottom of the page<br>• Click the Manage Subcontracts link, to the right of the line displaying the contract information. The *Manage Subcontracts* page appears<br>• On the *Manage Subcontracts* page, all subcontracts associated with this contract display<br>• Locate the appropriate subcontract and click the Manage Payments link, to the right of the line displaying the subcontract information. The *Manage Subcontract Payments* page appears<br>• On the *Manage Subcontract Payments* page, locate the payment you wish to edit and click the Update link, to the right of the line displaying the subcontract information. The *Update Payment* page appears<br>• On the *Update Payment* page, edit the payment information and click the Save button<br>• A red confirmation message will appear at the top of the page, including the assigned Payment ID, stating your payment has been saved successfully<br>• If you realize you have made a mistake, exit the page without saving by clicking the Back button. A pop-up message appears, asking if you are sure you want to exit without saving. Click OK. The changes are discarded and the *View Contracts* page appears |

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| TO CANCEL A PAYMENT |
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| • Log into the PIP self-service website<br>• Click on the **Subcontract Information** tab<br>• Click on the **Maintain Subcontracts** tab. The *View Contracts* page appears<br>• On the *View Contracts* page, enter a unique identifier, such as **Contract ID:** or **PIN:**, and then click the Search button<br>• The contract information displays at the bottom of the page<br>• Click the Manage Subcontracts link, to the right of the line displaying the contract information. The *Manage Subcontracts* page appears<br>• On the *Manage Subcontracts* page, all subcontracts associated with this contract display<br>• Locate the appropriate subcontract and click the Manage Payments link, to the right of the line displaying the subcontract information. The *Manage Subcontract Payments* page appears<br>• On the *Manage Subcontract Payment* page, locate the payment information you wish to edit and click the Update link, to the right of the line displaying the payment information. The *Update Payment* page appears<br>• On the *Update Payment* page, revise the **Subcontract Payment Amount:** to $0 and click the Save button<br>• A red confirmation message will appear at the top of the page, including the assigned Payment ID, stating your changes have been saved successfully<br>• You may click the Back button to return to the *Manage Subcontracts* page, where you will see the updated payment information |

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| TO ENTER A PAYMENT AFTER THE SUBCONTRACT END DATE |
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- Log into the PIP self-service website
- Click on the **Subcontract Information** tab
- Click on the **Maintain Subcontracts** tab. The *View Contracts* page appears
- On the *View Contracts* page, enter a unique identifier, such as a **Contract ID:** or **PIN:**, and then click the Search button. The contract information displays at the bottom of the page
- Click the Manage Subcontracts link, to the right of the line displaying the contract information. The *Manage Subcontracts* page appears
- Locate the appropriate subcontract and click the Add Payment link, to the right of the line displaying the subcontract information. The *Add Payment* page appears
- On the *Add Payment* page, enter the payment information and click the Save button.
- The required fields are:
  - **Subcontract Date of Payment:**
  - **Subcontract Payment Amount:**
  - **Subcontract Payment Description**: and
  - **Proof of Payment:**
- You will be returned to the *Manage Subcontracts* page, and the **Summary of Subcontract Payment Amount:** field, on this page, will update to reflect this payment
- A red confirmation message will appear at the top of the page, including the assigned Payment ID, stating your payment has been recorded successfully
- If there are multiple payments to record, use the Save & Add New Payment button, instead of the Save button. This will refresh the *Add Payment* page instead of returning you to the *Manage Subcontracts* page. You can immediately enter another payment

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| To Enter the final payment |
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- Log into the PIP self-service website
- Click on the **Subcontract Information** tab
- Click on the **Maintain Subcontracts** tab. The *View Contracts* page appears
- On the *View Contracts* page, enter a unique identifier, such as **Contract ID:** or **PIN:**, and then click the Search button
- The contract information displays at the bottom of the page
- Click the Manage Subcontracts link, to the right of the line displaying the contract information. The *Manage Subcontracts* page appears
- On the *Manage Subcontracts* page, all subcontracts associated with this contract display
- Locate the appropriate subcontract and click the Add Payments link, to the right of the line displaying the subcontract information. The *Add Payment* page appears
- On the *Add Payment* page, enter the payment information and change the **Is this your Final Payment?** Field to "Yes", using the drop-down menu
- A pop-up message appears, asking if you want to mark this subcontract complete. Once the subcontract is marked complete, you will not be able to add any more payments, unless you first reset the complete field to "No". Click OK and add the payment information
- Back on the *Manage Subcontracts* page, the **Summary of Subcontract Payment Amount:** field will be updated and the **Is This Subcontract Complete?** field will now be set to "Yes"
- A red confirmation message will appear at the top of the page, including the assigned Payment ID, stating your changes have been saved successfully

Note: You may not mark a payment as a Final Payment if there is any payment with a later payment date already saved in the PIP system. The payment designated as the Final Payment must be the payment with the latest date.

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| TO ENTER THE FINAL PAYMENT |
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| • Log into the PIP self-service website<br>• Click on the **Subcontract Information** tab<br>• Click on the **Maintain Subcontracts** tab. The *View Contracts* page appears<br>• On the *View Contracts* page, enter a unique identifier, such as **Contract ID:** or **PIN:**, and then click the Search button<br>• The contract information displays at the bottom of the page<br>• Click the Manage Subcontracts link, to the right of the line displaying the contract information. The *Manage Subcontracts* page appears<br>• On the *Manage Subcontracts* page, all subcontracts associated with this contract display<br>Click the Add Payments button.  The *Add Payment* page appears<br>Enter the payment information and also change the **Is this your Final Payment?** field to “Yes”<br>• Click the Save button<br>• A red confirmation message appears at the top of the page, including the assigned Payment ID, stating your payment has been recorded successfully<br><br>Note: If you add payments totaling the Subcontract Maximum Amount, the PIP system will prompt you and automatically mark the subcontract complete.  You may return later to either mark the payment as final or mark the subcontract as completed. |

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| TO REVIEW PAYMENT HISTORY ON A SUBCONTRACT |
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| • Log into the PIP self-service website<br>• Click on the **Subcontract Information** tab<br>• Click on the **Maintain Subcontracts** tab. The *View Contracts* page appears<br>• On the *View Contracts* page, enter a unique identifier, such as **Contract ID:** or **PIN:**, and then click the Search button<br>• The contract information displays at the bottom of the page<br>• Click the Manage Subcontracts link, to the right of the line displaying the contract information. The *Manage Subcontracts* page appears<br>• On the *Manage Subcontracts* page, all subcontracts associated with this contract display<br>• Locate the appropriate subcontract and click the Manage Payments link, to the right of the line displaying the subcontract information. The *Manage Subcontract Payments* page appears<br>• On the *Manage Subcontract Payments* page, all payments associated with this subcontract display<br>• Locate the appropriate payment and click the View History link, to the right of the line displaying the payment information. The *View Payment History* page appears<br>• This page lists, in reverse chronological order, all changes that were made to the payment<br>• To download this information into an Excel (.csv) format, click the Download button. A pop-up message appears, asking you to open or save the file. If you open the file, be sure to save it before closing Excel |

For more information, contact:

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