PIP Activation Quick Start Guide

Follow the steps below to activate online access and/or create a vendor account in the Payee Information Portal (PIP) at www.nyc.gov/pip
If you need steps with screen shots, 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 already exists, and you only need to provide financial information to activate online access.

If your account is found, and you need to activate online access to it, see **Section 1: Activating an Existing Vendor Account**, screenshots on pages 4 - 8 of this guide:	If you are *creating a New vendor account* to do business with the City in the future, see **Section 2: Activating a New Vendor Account**, screenshots on pages 9 - 18 of this guide:
5. Enter a financial transaction from the past 5 years as a 15-digit Check/EFT Number and amount paid from a NYC check stub or your bank account statement. If you have no financial transactions within the past 5 years, contact the PIP Help Desk for assistance: PIP@fisa-opa.nyc.gov.	5. Create a User ID and Password and enter your Email address.
	6. Select Security Questions and answer them.
6. Create a User ID and password and enter your Email address.	7. Click the link in the Email you receive from PIP to continue the activation process. ▪ The link will bring you to PIP.
7. Select Security Questions and answer them.	8. Log in using the User ID and Password you established.
8. Click the link in the Email you receive from PIP to continue the activation process. • The link will bring you to PIP.	9. Determine whether you are activating as an Individual or Company, then enter a valid TIN number and any other required business information.
9. Log in using the User ID and Password you established.	10. Provide your address(es) and contact information.
10. Click the **Submit Activation** button to complete the activation process.	11. From the "Activation Summary" page, click **Submit Activation**.
	12. Review the Substitute W-9 Certification form. Then electronically sign and submit it.
Note: 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 PIP/FMS vendor code, and select all relevant commodity codes. Learn more at www.nyc.gov/passport	**Note**: 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 www.nyc.gov/passport

This guide provides the steps you need to activate online access and/or set up an account for the vendor self-service Payee Information Portal (PIP), for existing or new City of New York vendors.

- If you have an **existing** vendor code from the City of New York and want to access your account online, please follow the instructions below for **EXISTING VENDOR**. (If you cannot activate your existing account, contact the PIP Helpdesk 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 new or existing vendors begin 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 a Taxpayer Identification Number, or partial name, using the wildcard (*) to help with your search. Contact the PIP Helpdesk at 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.

If You See This Link Next To Your Legal Business Name	WHAT IT MEANS / Action You Can Take
Click here to activate your account	You do business with the City and have a Vendor Number (code), *but the online account access has not been activated in PIP.* **Click this link to activate it.** **You need financial information within the past 5 years to continue:** ▪ **A 15-digit NYC Check or EFT number and amount (from a check stub or your bank account statement).** **If you have no financial transactions within the past 5 years, contact the PIP Help Desk for assistance**: PIP@fisa-opa.nyc.gov.
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 PIP@fisa-opa.nyc.gov for assistance.

Step 1.2: On the Account Verification page, verify your account by selecting **one** of the options and entering:

- An existing 15-digit Check/EFT number and amount, issued within the past 5 years from the City's Financial Management System.

  OR

- Only if you had no financial transactions in past 5 years, an Activation Code you received from the PIP Helpdesk.

Step 1.3: Click the ***Next*** button.

Step 1.4: On the <u>My User Information</u> 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.

Verify Email Address

To continue your PIP activation, we must verify your email address. When you receive the email we send you, follow the link provided or copy the link into your browser.

Make sure your own security setting will not block the receipt of this email. To prevent the email from being blocked, add the following address to your email contacts : pip@fisa-opa.nyc.gov

An email will be sent to the following address : jsmith@company.com

A verification email will be sent. Click "Next" to continue.

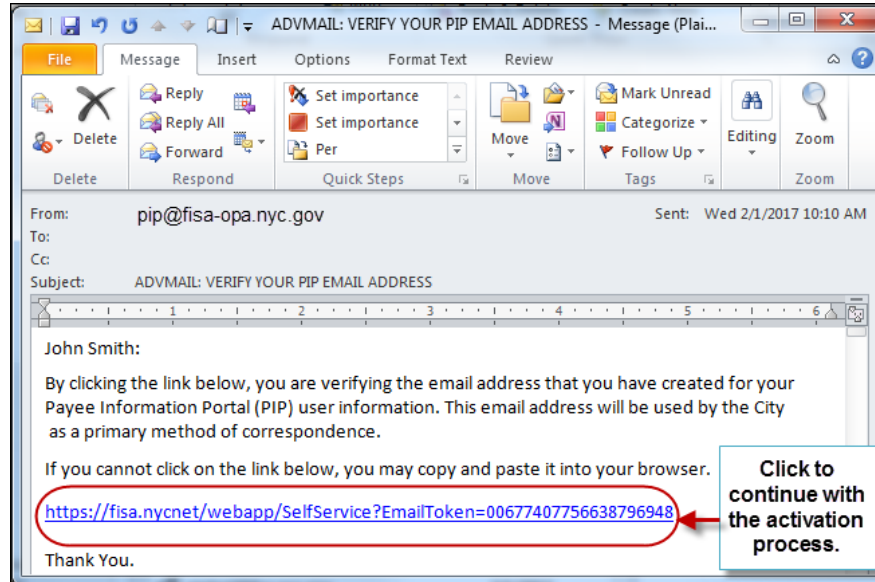Cancel Activation   Back   Next

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.)

ADVMAIL: VERIFY YOUR PIP EMAIL ADDRESS - Message (Plai...

File   Message   Insert   Options   Format Text   Review

Reply   Reply All   Forward | Set importance   Set importance   Per | Move | Mark Unread   Categorize   Follow Up | Editing   Zoom

Delete   Respond   Quick Steps   Move   Tags   Zoom

From: pip@fisa-opa.nyc.gov   Sent: Wed 2/1/2017 10:10 AM
To:
Cc:
Subject: ADVMAIL: VERIFY YOUR PIP EMAIL ADDRESS

John Smith:

By clicking the link below, you are verifying the email address that you have created for your Payee Information Portal (PIP) user information. This email address will be used by the City as a primary method of correspondence.

If you cannot click on the link below, you may copy and paste it into your browser.

https://fisa.nycnet/webapp/SelfService?EmailToken=00677407756638796948

Click to continue with the activation process.

Thank You.

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.

Payee Information Portal

Login

To continue activation, enter your User ID and Password.

User ID   JohnSmith
Password   •••••••

After you enter your User ID and Password, click "Login" to continue

Login
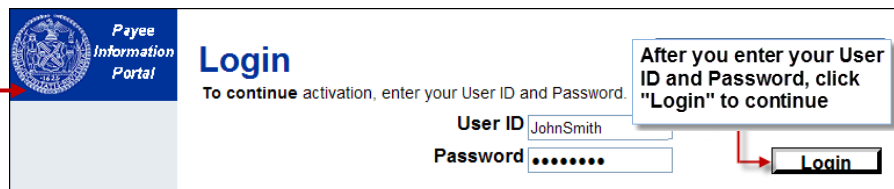
Step 1.10: Click *Submit Activation* to complete the activation.
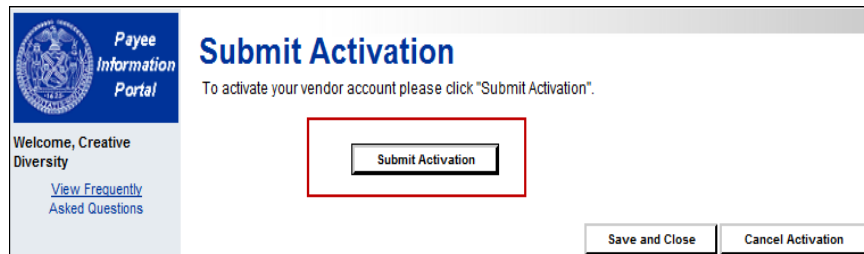
Payee Information Portal

Submit Activation

To activate your vendor account please click "Submit Activation".

Welcome, Creative Diversity

View Frequently Asked Questions

Submit Activation

Save and Close   Cancel 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.

Print This Page

PIP Activation Process Complete

Your Vendor Code is: 0003049206

*Please save your Vendor Code for future reference

The PIP Activation Process is now complete. You were assigned a unique "Vendor Code." This is also known as your "Account Number."

Electronic Funds Transfer (Direct Deposit) for Vendor Payments

In accordance with Local Law 43 enacted by the City Council in 2007, all vendors with City contracts over $25,000 are required to enroll in the City of New York's Electronic Funds Transfer/Direct Deposit program.

The EFT program is a safe and efficient method for sending Vendor payments directly to your authorized bank account via a secure transaction. It can take up to 10 business days to become an active participant, assuming the bank verification is successful.

All vendors and payees are encouraged to enroll in the program. Go to the EFT Enrollment page in PIP to sign up for EFT with the City of New York.

Please note that a fee of $3.50 may be charged for the issuance of a paper check. Look at payment detailed information in the Check/EFT Financial Inquiry to see if a check fee was deducted from your payment.

Now you can login to your PIP account to view or update your account information.

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 in red at the top of page 2.

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 <u>My User Information</u> 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 <u>Verify Email Address</u> page, click ***Next***.
An Email will be sent to the Email address you entered.

Step 2.5: On the <u>Thank You</u> 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*.

Step 2.10: Most of the fields on the <u>My Business Information</u> 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 <u>Activation Summary</u> 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 <u>Downloadable Forms</u> 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.