

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 <u>creating a New vendor account</u> 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; or a Contract/Purchase Order ID. 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. Select Security Questions and answer them.	7. Click the link in the Email you receive from PIP to continue the activation process. <ul style="list-style-type: none"> ▪ The link will bring you to PIP.
8. Click the link in the Email you receive from PIP to continue the activation process. <ul style="list-style-type: none"> • The link will bring you to PIP. 	8. Log in using the User ID and Password you established.
9. Log in using the User ID and Password you established.	9. Determine whether you are activating as an Individual or Company, then enter a valid TIN number and any other required business information.
10. Click the Submit Activation button to complete the activation process.	10. Provide your address(es) and contact information.
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	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 the vendor code created in PIP, and select all relevant commodity codes. Learn more at www.nyc.gov/passport

PIP Activation Quick Start Guide

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.

The screenshot shows the PIP website interface. At the top, there are navigation links for 'Comptroller', 'DOE', and 'NYC.gov'. The main header reads 'Welcome to the Payee Information Portal of the City of New York'. Below this, there is a brief description of the portal's purpose. The page is organized into three main columns. The left column contains a login form with fields for 'User ID' and 'Password', a 'Login' button, and a 'Forgot Password' link. A red arrow points to the 'Activate' button, with a callout box stating 'Click here to initiate process'. The middle column features an 'Announcements' section with several notices, including one dated 04/14/2018 regarding a new process for managing commodities and self-identified business types. The right column contains a 'New York City Department Contact Listing' section with a link to 'Department Contacts', and a 'Forms' section listing several eLearning modules and quick start guides, including 'PIP Activation eLearning #1 - New Vendor' and 'PIP Activation Quick Start Guide for New/Existing Vendor'. The right sidebar contains links for 'Help', 'Contact Us', and 'Privacy Report', along with a photograph of the New York State Capitol building.

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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.

PIP Activation Quick Start Guide

Section 1: Activating an **EXISTING** Vendor Account

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.

[Cancel Activation](#) [Back](#)

Search for an Existing Account/Results Found

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 is located outside the United States;
- Your company 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

Please stop and do not continue on this website. Instead please send an e-mail inquiry to 1042vendor@comptroller.nyc.gov for further instructions.

To activate your account you must have a vendor code. This page will help you determine whether or not you have one. You will not be able to create a new code if one already exists. If the account exists it will be designated as a company or individual based on the information you previously provided. Please select one of the search options below to determine if you already have a vendor code.

Company Search

To see if you have a vendor code and have an Employer Identification Number (EIN) on file, first search by TIN:

Taxpayer Identification Number OR Legal Business Name

Hint: If you would like to search by Legal Business Name use a wildcard. See FAQs for more information.
For example: Using 'Global Advertising' as an example; *Global returns 'Advertising Global', Global* returns 'Global Advertising' and *Global* returns any name containing 'Global'.

[Search](#)

OR

Individual Search

To see if you have a vendor code and have a Social Security Number (SSN) on file enter your Last Name and last four digits of your Social Security Number.

Last Name AND Last 4 digits of SSN

Hint: If you would like to search by Last Name, you may want to use wildcards (see FAQs for more information).
For example: Using 'Smith' as an example; *Smith will return all people with last name ending in 'Smith', Smith* will return all people with last name that starts with 'Smith', and *Smith* will return all people whose last name contains 'Smith'.

[Search](#)

The following exists for the information you entered:

Vendor Number	Legal Business Name	Alias/DBA Name	Activated?	
000	BIG APPLE GRAPHICS INC		No	Click here to activate your account

Click the applicable link to continue

Has your account been found and listed above?

Yes, but it is already activated → Click the "Contact your Administrator" link to determine who you need to contact for access.

Yes, but it is not yet activated → Click the "Click here to activate your account" link to begin the process for activating your account.

Yes, but the activation is already in progress → Click the "Click to continue activation" link to login and continue activating your account.

If you did not find your account and believe you have a vendor code, change your search criteria to be less specific by using wildcards (see Hint above). If you still did not find your account, please stop and call 212-857-1777 for assistance.

If you have never received a payment from the City of New York and do not have a vendor code, you may activate in PIP and receive a vendor code by [clicking here](#).

[Cancel Activation](#) [Back](#)

If You See This Link Next To Your Legal Business Name	WHAT IT MEANS / Action You Can Take
<u>Click here to activate your account</u>	<p>You do business with the City and have a Vendor Number (code), <i>but the online account access has not been activated in PIP</i>. Click this link to activate it. You need financial information within the past 5 years in the form of ONE of the following to continue:</p> <ul style="list-style-type: none"> A 15-digit 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). If you have no financial transactions within the past 5 years, contact the PIP Help Desk for assistance: PIP@fisa-opa.nyc.gov.
<u>Contact your Administrator</u>	<p>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.</p>
<u>Click to Continue Activation</u>	<p>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.</p>

PIP Activation Quick Start Guide

Section 1: Activating an **EXISTING** Vendor Account

Step 1.2: On the [Account Verification](#) page, verify your account by selecting **one** of the 3 options and entering:

- An existing 15-digit Check/EFT number and amount within the past 5 years; OR
- A Contract or Purchase Order Doc ID within the past 5 years; 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.

The screenshot shows the 'Account Verification' page of the Payee Information Portal. The page title is 'Account Verification' and it includes links for 'Privacy Report' and 'Contact Us'. There are three buttons at the top right: 'Cancel Activation', 'Back', and 'Next'. A red arrow points from the 'Next' button to a callout box that says 'Click Next to Continue'. The page content is divided into three sections, each with a radio button and a corresponding form field:

- Select Check/EFT:** This section has a radio button selected. The form fields are 'Check/EFT Number' (with value 123456789012345 and example 1234567890) and 'Check/EFT Amount' (with value 12345.67 and example 12345.67). A callout box points to the 'Next' button.
- Select Contract or Purchase Order:** This section has a radio button unselected. The form fields are 'Contract or Purchase Order number' (with a dropdown menu set to 'PO' and value '123', and a separate field with value '12345678901'). A callout box points to the 'Next' button.
- Select Activation Code:** This section has a radio button unselected. The form field is 'Activation Code' (with value 123456789012 and example 123456789012). A callout box points to the 'Next' button.

Additional Resources & Information:

- As you complete each step and if there are errors:
- A notification message will be displayed at the top of the page.
- You must correct the errors indicated before continuing to the next step.
- Additional Help can be found in the Frequently Asked Questions located on the left hand navigation bar.

A callout box explains: 'The 12-digit Activation Code is only available if you didn't have financial transactions in the past 5 years. Contact the PIP Help desk for the 6-digit code to add to the first 6 digits of your Taxpayer ID Number for entry on this page. In this example the TIN was 123456 and the code was 789012.'

PIP Activation Quick Start Guide

Section 1: Activating an **EXISTING** Vendor Account

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.

Comptroller DOE NYC.gov Vendor Enrollment Application Privacy Report Contact Us

My User Information Cancel Activation Back Next

Welcome, New User
[View Frequently Asked Questions](#)
 User Information
 Verify Email

Create your user ID here. You will be assigned the role of Primary Account Administrator. Please see the Frequently Asked Questions for additional details about the Primary Account Administrator role.

General Information

*User ID (case sensitive): JohnSmith (User ID should be at least 7 characters in length. Refrain from using characters such as / < > + , ; = !")

*First Name: John

*Last Name: Smith

*Email: jsmith@company.com

*Re-enter Email: jsmith@company.com

*Phone: 212-555-1212 Ext.:
XXX-XXX-XXXX

Fax: XXX-XXX-XXXX

Password

*Password (case sensitive): (Passwords must be between 8 and 16 characters in length and contain at least 1 numeric value)

*Re-enter Password:

Security Questions

If you forget your password and need to reset it, you will be asked to respond to the questions you select below.

	Enter Answer	Re-enter Answer
*Question 1: What street did you live on in your childhood?
*Question 2: What was your childhood nickname?
*Question 3: What's the last name of your favorite teacher?
*Question 4: What's the make of your first car?
*Question 5: What's the name of your first pet?

* Indicates a required field

Additional Resources & Information:

- As you complete each step and move to the next step, the system will check for errors. If there are errors:

Cancel Activation Back Next

The red asterisk (*) means the fields are required. Then click "Next"

PIP Activation Quick Start Guide

Section 1: Activating an **EXISTING** Vendor Account

Step 1.6: On the Verify Email Address page, click **Next**. An Email will be sent to the Email address you entered.

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

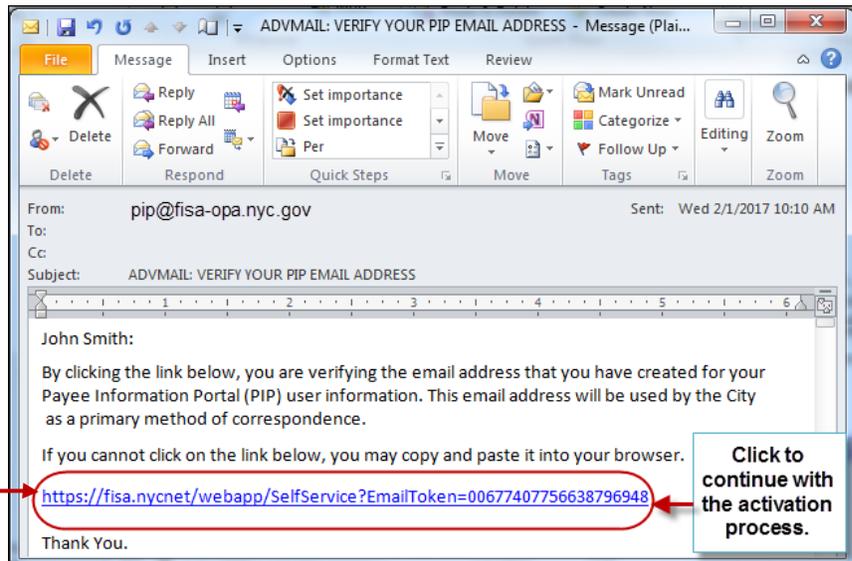
Back

Next

Step 1.7: 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.



Login

To **continue** activation, enter your User ID and Password.

User ID

Password

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

Login

Step 1.10: Click **Submit Activation** to complete the activation.



Submit Activation

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

Submit Activation

Save and Close

Cancel Activation

PIP Activation Quick Start Guide

Section 1: Activating an **EXISTING** Vendor Account

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.**

PIP Activation Quick Start Guide

Section 2: Activating a **NEW** Vendor Account

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.

Search for an Existing Account Results Not Found

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 is located outside the United States;
- Your company 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

All foreign vendors must send an email to:
1042vendor@comptroller.nyc.gov
for further instructions.
DO NOT continue on this website.

Please stop and do not continue on this website. Instead please send an e-mail inquiry to 1042vendor@comptroller.nyc.gov for further instructions.

To activate your account you must have a vendor code. This page will help you determine whether or not you have one. You will not be able to create a new code if one already exists. If the account exists it will be designated as a company or individual based on the information you previously provided. Please select one of the search options below to determine if you already have a vendor code.

Company Search

To see if you have a vendor code and have an Employer Identification Number (EIN) on file, first search by TIN:

Taxpayer Identification Number OR Legal Business Name

Hint: If you would like to search by Legal Business Name use a wildcard (See FAQs for more information).
For example: Using 'Global Advertising' as an example; *Global returns 'Advertising Global', Global* returns 'Global Advertising' and *Global* returns any name containing 'Global'.

OR

Individual Search

To see if you have a vendor code and have a Social Security Number (SSN) on file enter your Last Name and last four digits of your Social Security Number.

Last Name AND Last 4 digits of SSN

Hint: If you would like to search by Last Name, you may want to use wildcards (see FAQs for more information).
For example: Using 'Smith' as an example; *Smith will return all people with last name ending in 'Smith'. Smith* will return all people whose last name contains 'Smith'.

No results have been found for your search.

If you believe you have a vendor code, change your search criteria to be less specific by using wildcards (see Hint above). If you still did not find your account, please stop and call 212-857-1777 for assistance.

If you have never received a payment from the City of New York and do not have a vendor code, you may activate in PIP and receive a vendor code by [clicking here](#)

Additional Resources & Information:

- As you complete each step and move to the next step, the system will check for errors. If there are errors:
- A notification message will be displayed at the top of the page.
- You must correct the errors indicated before continuing to the next step.
- Additional Help can be found in the Frequently Asked Questions located on the left hand navigation bar.

Cancel Activation Back

PIP Activation Quick Start Guide

Section 2: Activating a **NEW** Vendor Account

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.

Comptroller DOE NYC.gov Vendor Enrollment Application

Payee Information Portal

Welcome, New User
[View Frequently Asked Questions](#)

User Information
 Verify Email

My User Information

Create your user ID here. You will be assigned the role of Primary Account Administrator. Please see the Frequently Asked Questions for additional details about the Primary Account Administrator role.

General Information

*User ID (case sensitive): JohnSmith (User ID should be at least 7 characters in length. Refrain from using characters such as / < > + , ; = ! *)

*First Name: John

*Last Name: Smith

*Email: jsmith@company.com

*Re-enter Email: jsmith@company.com

*Phone: 212-555-1212 Ext.:
XXX-XXX-XXXX

Fax: XXX-XXX-XXXX

Password

*Password (case sensitive): (Passwords must be between 8 and 16 characters in length and contain at least 1 numeric value)

*Re-enter Password:

Security Questions

If you forget your password and need to reset it, you will be asked to respond to the questions you select below.

		Enter Answer	Re-enter Answer
*Question 1:	What street did you live on in your childhood?	.....	.....
*Question 2:	What was your childhood nickname?	.....	.....
*Question 3:	What's the last name of your favorite teacher?	.....	.....
*Question 4:	What's the make of your first car?	.....	.....
*Question 5:	What's the name of your first pet?	.....	.....

* Indicates a required field

Additional Resources & Information:

- As you complete each step and move to the next step, the system will check for errors. If there are errors:

Cancel Activation Back Next

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

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

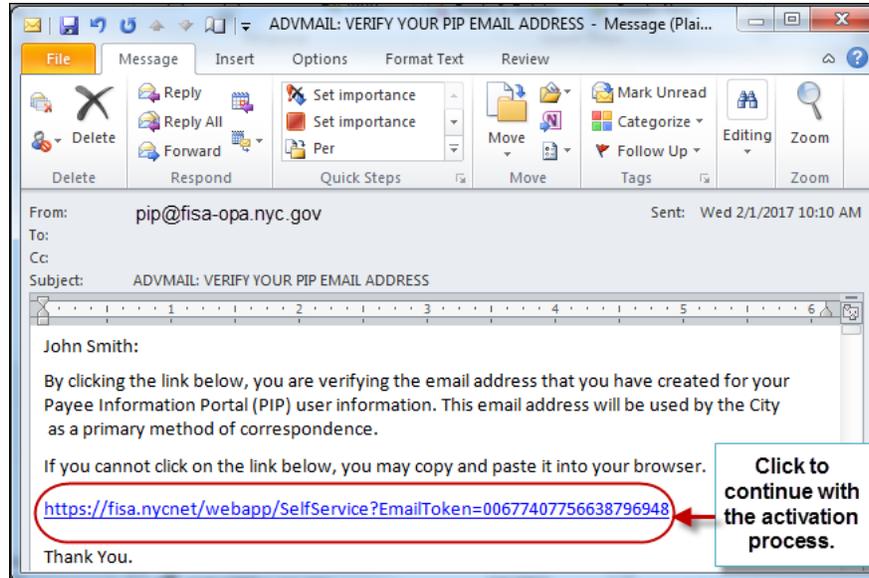
Step 2.5: On the Thank You page, click **Close Browser** to exit PIP.

PIP Activation Quick Start Guide

Section 2: Activating a **NEW** Vendor Account

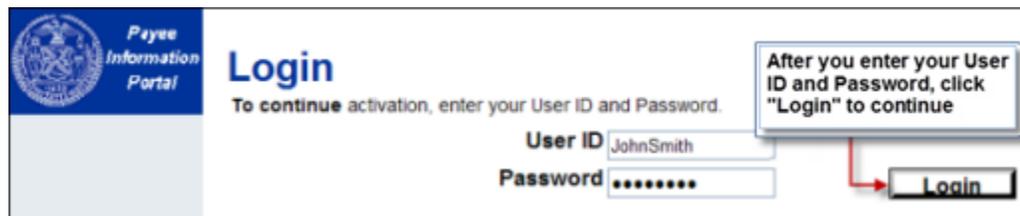
Step 2.6: Open the verification Email and click the **link**. It will take you to a PIP login page.

(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.



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Section 2: Activating a **NEW** Vendor 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**.

Payee Information Portal

Welcome, John Smith
[View Frequently Asked Questions](#)

- New Account Info.
- My Business Info.
- Addresses & Contacts
- Activation Summary

Step 1: New Account Activation

Please choose one of the following options to describe how you plan on doing business and select the Next button to continue.

▼ TIN Type

I will use a Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), or Adoptive Identification Number (ATIN).
Please select one of the following: SSN ITIN ATIN

I will use my entity's Employer Identification Number (EIN).

AND

▼ Classification

I plan to do business using the following classifications. Please select only one.
Hint: Use the Frequently Asked Questions to obtain a definition of the classifications.

Select	Classification
<input type="radio"/>	Individual
<input type="radio"/>	Partnership
<input type="radio"/>	Corporation
<input type="radio"/>	Trust
<input type="radio"/>	State Government
<input type="radio"/>	Other Government
<input type="radio"/>	Joint Venture
<input type="radio"/>	Other Non-Profit Org
<input type="radio"/>	Estate
<input type="radio"/>	LLC Filing as Partner
<input type="radio"/>	LLC Filing as Corp
<input type="radio"/>	LLC Filing as Sole Prop
<input type="radio"/>	Church/Religious Org
<input type="radio"/>	Personal Service Corp
<input type="radio"/>	Sole Prop/Small Business
<input type="radio"/>	Federal Government

OR

▼ Question

If you need assistance select the Submit Question button to send us your questions.

Annotations:

- Red box around TIN Type options.
- Red box around Classification list.
- Red arrow from TIN Type to Classification: "The list of Classification types changes, based on the TIN Type you selected."
- Red arrow from TIN Type to Next button: "Select the TIN Type. Note: If you select Social Security Number be sure to select SSN, ITIN, or ATIN."
- Red arrow from Next button to Next button: "Click Next"
- Red arrow from Question section to Next button: "Note: If you have any questions, use the 'Submit Question' link. Once you get an answer, you can log back in and resume activation."

PIP Activation Quick Start Guide

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.

Payee Information Portal
Welcome, John Smith
View Frequently Asked Questions

New Account Info.
 My Business Info.
 Addresses & Contacts
 Activation Summary

Step 2: My Business Information [Save and Close] [Cancel Activation] [Back] [Next]

Please enter the general information below. Fields with a red asterisk (*) indicate required fields. Some of the fields are populated with data gathered from the questions you previously answered. Please review all information carefully before proceeding. You must select the Save and Close prior to exiting. If you do not, you will have to re-enter all data again.

Organization Information
*Organization Type: Individual [Change]
*Classification: Individual [v]
Location Web Address: []

Legal Name Information
*First Name: John *Last Name: Smith
Middle Name: [] Business Name (Alias/DBA): [] Name on Check: Legal Name [v]

1099 TIN Information
*Create Taxpayer ID Number: [] *Re-enter Taxpayer ID Number: []
Taxpayer ID Number: [] Taxpayer ID Number Type: SSN/TIN/EATIN Detailed TIN Type: SSN [v]

Legal (1099) Address Information
*Street 1: 1 Main Street *City: New York
State/Province: New York [v] Zip/Postal Code: 10001
Country: United States [v]

Exemption from Backup Withholding and FATCA Reporting
The following codes identify payees that are exempt from Backup Withholding. Generally, individuals (including sole proprietors) are not exempt from Backup Withholding. Corporations are not exempt from Backup Withholding if they supply legal or medical services. For payees exempt from Backup Withholding, please select the appropriate choice. If you do not qualify, leave this field blank.
Backup Withholding Exemption: [] [Find]
The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this application for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this application for an account you hold in the United States, leave this field blank.
FATCA Reporting Exemption: [] [Find]

Discount Information
If appropriate, please enter any Discount Terms you offer for prompt payment of invoices.
Number of Days 1: [] Discount Percent 1: []
Number of Days 2: [] Discount Percent 2: []
Number of Days 3: [] Discount Percent 3: []
Number of Days 4: [] Discount Percent 4: []

[Save and Close] [Cancel Activation] [Back] [Next]

Fields with red asterisks (*) are required to be filled in to move forward

Other fields should only be filled in if they apply

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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.

The screenshot shows the 'Address Information Questionnaire' page. The sidebar on the left includes a 'Payee Information Portal' logo and navigation links like 'View Frequently Asked Questions'. The main content area has a 'Legal Address Information' section with fields for Street 1 (1 Main Street), City (New York), State (NY), and Zip/Postal Code (10001). Below this is an 'Address Questions' section with three questions: A, B, and C, each with 'Yes' and 'No' radio button options. A text box on the right says 'Answer these questions as applicable, then click "Next" to continue. Additional information for each question is provided below.' A red arrow points from this text box to the 'Next' button at the bottom right of the form.

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".

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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 3: Addresses and Contacts

Based on the answers you provided on the previous page additional information is required to capture address and contact details for each of your different address types. If you wish to enter the same address and contact combination for each type enter all of the required fields below related to your Administrative, Ordering, Payment, and Billing address and select the Next button to proceed. Please note that your Billing address information is optional. If you do have separate address and contact combinations for each address type you may go back to the previous page and change the answers you provided in order to fill out all the address and contact information on multiple pages.

***Administrative**
Administrative: This is the address where correspondences that do not relate to Payment, Billing, or Ordering will be sent. The contact person should be someone who will be able to appropriately route all correspondences, which may be sent via e-mail, fax, or direct mail. In order to avoid any disruption in correspondence, please avoid the use of P.O. Boxes when entering your administrative address.

***Ordering**
Ordering: This is the address where orders and solicitations will be sent. The contact person should be someone who will be able to respond to or appropriately route correspondences regarding contracting opportunities. Please note that notices of solicitation for bids and requests for proposals will be sent via e-mail to the contact person listed for the Ordering Address. Other types of correspondences related to orders may be sent via e-mail, fax, or direct mail.

***Payment**
Payment: This is the address for your Accounts Receivable, and where contract and other payments should be sent. The contact person should be someone who will be able to process or appropriately route payments made to the business.

Billing
Billing: This is the address for your Accounts Payable, and where bills and invoices should be sent. The contact person should be someone who will be able to process or appropriately route bills and invoices received by the business.

Address Information

*Street 1: 1 Main St
Street Address, P.O. Box, Company Name, etc.

Street 2:
Street Address, P.O. Box, Company Name, etc.

*City: New York

*State/Province: New York

*Zip/Postal Code: 10044-0052

*Country: United States

County:
*Phone: XXX-XXX-XXXX Ext.:
Additional Address Info:
Division/Department:

Contact Information

For the address type shown above, please enter a contact person

*Principal Contact: John Smity

*Phone: 212-555-1212

Phone Extension:
Alternate Phone:
Alternate Phone Extension:

Fax:
Fax Extension:
Alternate Fax:
Alternate Fax Extension:

*Email: jsmith@company.com

Correspondence Type: Email

Click "Next"

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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.

The screenshot shows the 'Activation Summary' page for a vendor account. The page is titled 'Activation Summary' and includes a navigation bar with buttons for 'Save and Close', 'Cancel Activation', 'Back', 'Submit Activation', and 'Print This Page'. The main content area is divided into several sections, each with an 'Update Information' link:

- Organization Information:** Organization Type: Individual, 1099 Classification: Individual, Location Web Address: [blank].
- Legal Name Information:** Legal Name: Jack Jones, Business Name (Alias/ DBA): [blank], Name Control: JONE, First Name: Jack, Middle Name: [blank], Last Name: Jones, Name on Check: [blank].
- 1099 TIN Information:** Taxpayer ID Number: *****2122, Detailed TIN Type: SSN, Taxpayer ID Number SSMITIN/ATIN Type: [blank].
- Legal (1099) Address Information:** Street 1: 450 w33rd street, City: manhattan, State/Province: New Jersey, Zip/Postal Code: 07003, Country: United States.
- Exemption from Backup Withholding & FATCA Reporting:** Backup Withholding Code: [blank], FATCA Reporting Code: [blank].
- Billing Address:** Address Information: Street 1: 450 w33rd street, Street 2: [blank], City: manhattan, State/Province: New Jersey, Zip/Postal Code: 07003, Division/Department: [blank], Country: United States, County: [blank], Phone: 2122122122, Phone Extension: [blank], Additional Address Info: [blank].
- Contact Information:** Principal Contact: Jack Jones, Phone: 2122122122, Phone Extension: [blank], Alternate Phone: [blank], Alternate Phone Extension: [blank], Fax: [blank], Fax Extension: [blank], Alternate Fax: [blank], Alternate Fax Extension: [blank], Email: fact@fisa-opa.nyc.gov, Correspondence Email Type: [blank], English Spoken: Yes.

Annotations on the page include:

- A box with the text: "Use 'Update Information' links to change information before submitting for activation." with arrows pointing to the 'Update Information' links for the Legal Name, 1099 TIN, and Billing Address sections.
- A box with the text: "There are two options for submitting your activation. In order to receive awards and payments, you are required to sign the W-9. If you select 'Opt-Out', you are eligible for commodities and solicitations only." with an arrow pointing to the 'Opt-Out' checkbox.
- A box with the text: "Click 'Submit Activation' above to create and electronically sign your W-9 on the next screen. OR Check the Opt-Out box below if you do not want to sign the W-9 and click 'Submit Activation' to continue. Note: If you do not sign the W-9 you cannot receive awards and payments directly from the City of New York, but you are still eligible to enroll for commodities, receive solicitations or be a subcontractor. If you do not sign the W-9 at this time, you can sign it after you complete activation (see FAQs for details)." with an arrow pointing to the 'Submit Activation' button.

Additional Resources & Information:

- As you complete each step and move to the next step, the system will check for errors. If there are errors:
- A notification message will be displayed at the top of the page.
- You must correct the errors indicated before continuing to the next step.
- Additional Help can be found in the Frequently Asked Questions located on the left hand navigation bar.

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Section 2: Activating a **NEW** Vendor Account

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.

Sign Document

NYC FMS	THE CITY OF NEW YORK-PAYEE INFORMATION PORTAL SUBSTITUTE FORM W-9 REQUEST FOR TAXPAYER IDENTIFICATION NUMBER & CERTIFICATION	DO NOT SUBMIT FORM TO IRS PLEASE SEE SUBMISSION INSTRUCTIONS ON LOWER PORTION OF THE FORM 2013 REVISION 1
VENDOR/CUSTOMER CODE: VS000		
Part I - Vendor Information		
1. Legal Business Name: (As it appears on IRS EIN records, CP575, 147C-01- Social Security Admin Records, Social Security Card, Social Security Certification): John Smith	2. Doing Business As:	
3. Entity Type: Individual	4. For Official Use Only: 308	
Part II - Taxpayer Identification Number & Taxpayer Identification Type		
1. Taxpayer Identification Number:	2. Taxpayer Identification Number Type:	

Under the penalties of perjury, I certify that:

1. The number shown on this form is my correct Taxpayer Identification Number, and
2. I am not subject to Backup Withholding because (a) I am exempt from Backup Withholding, or (b) I have not been notified by the IRS that I am subject to Backup Withholding as a result of a failure to report all interest or dividends, or (c) The IRS has notified me that I am no longer subject to Backup Withholding, and
3. I am a US citizen or other US person, and
4. The FATCA code(s) entered on this Form (if any) indicating that I am exempt from FATCA Reporting is correct.

The Internal Revenue service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

**I declare that I read and agree to the above statements, I examined the information within my W-9, and I certify that my W-9 is correct.*

I Agree I Do Not Agree

Enter your PIP password.

Enter Password: ●●●●●●

Sign Back

If you clicked 'I Do Not Agree', click...

If you clicked 'I Agree', please enter the password associated with your PIP User ID and click 'Sign' to electronically sign your W-9.

The City's W-9 review and approval process is 5-10 business days, excluding City holidays.

Click "Sign" to submit your activation.

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Section 2: Activating a **NEW** Vendor Account

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.

[Print This Page](#)

PIP Activation Process Complete

Your Vendor Code is: VS00053053
***Please save your Vendor Code for future reference**

Thank you for completing the online portion of the PIP Activation Process. You may now login to PIP using the User ID and Password you created.

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.

Download the forms below for your own records.

Downloadable Forms

-  [Download Substitute W-9](#)
-  [PIP Activation Report](#)

Click login to enroll in EFT

Now you can [login](#) to your PIP account to view or update your account information.

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