



NonProfit
HelpDesk

2025-2026

Nonprofits:
We're Here To
Help YOU

**NYC Discretionary Funding:
Submitting Prequalification and Navigating PASSPort**

with Special Guests from

The Mayor's Office of Contract Services

May 12, 2026 at 1:00pm | FACILITATOR: TAMARA KESHECKI

NONPROFIT HELPDESK

We're here for you!

- Free Live Workshops
- Archive of Past Workshops
- LinkedIn Community
- Free Expert Support

Find out more at www.nphd.org

These workshops are funded by generous allocations from NYC Council Members



WORKSHOPS FOR CAPACITY BUILDING & NYC DISCRETIONARY FUNDING



From Logo to Legacy: Building Your Brand Story

Today • 12:00 PM EDT

Free



You Ask, We Answer: NYC Council Discretionary Expense Funding

Tomorrow • 6:30 PM EDT

Free



Nonprofit Excellence - Top 10 Best Practices for Nonprofit Organizations

Tue, May 27 • 12:00 PM EDT

Free



NYC Council Discretionary Funding Q&A w/ NYC Dept of Youth & Community Dev.

Wed, May 28 • 6:30 PM EDT

Free



Submitting the HHS Prequalification (PQL) Application

Wed, Jun 4 • 6:30 PM EDT

Free



Getting Started with Grants

Tue, Jun 10 • 12:00 PM EDT

Free



Navigating NYC PASSPort for Nonprofits

Tue, Jun 10 • 6:30 PM EDT

Free



NYC Council Discretionary Expense Funding: Contracting & Reimbursement

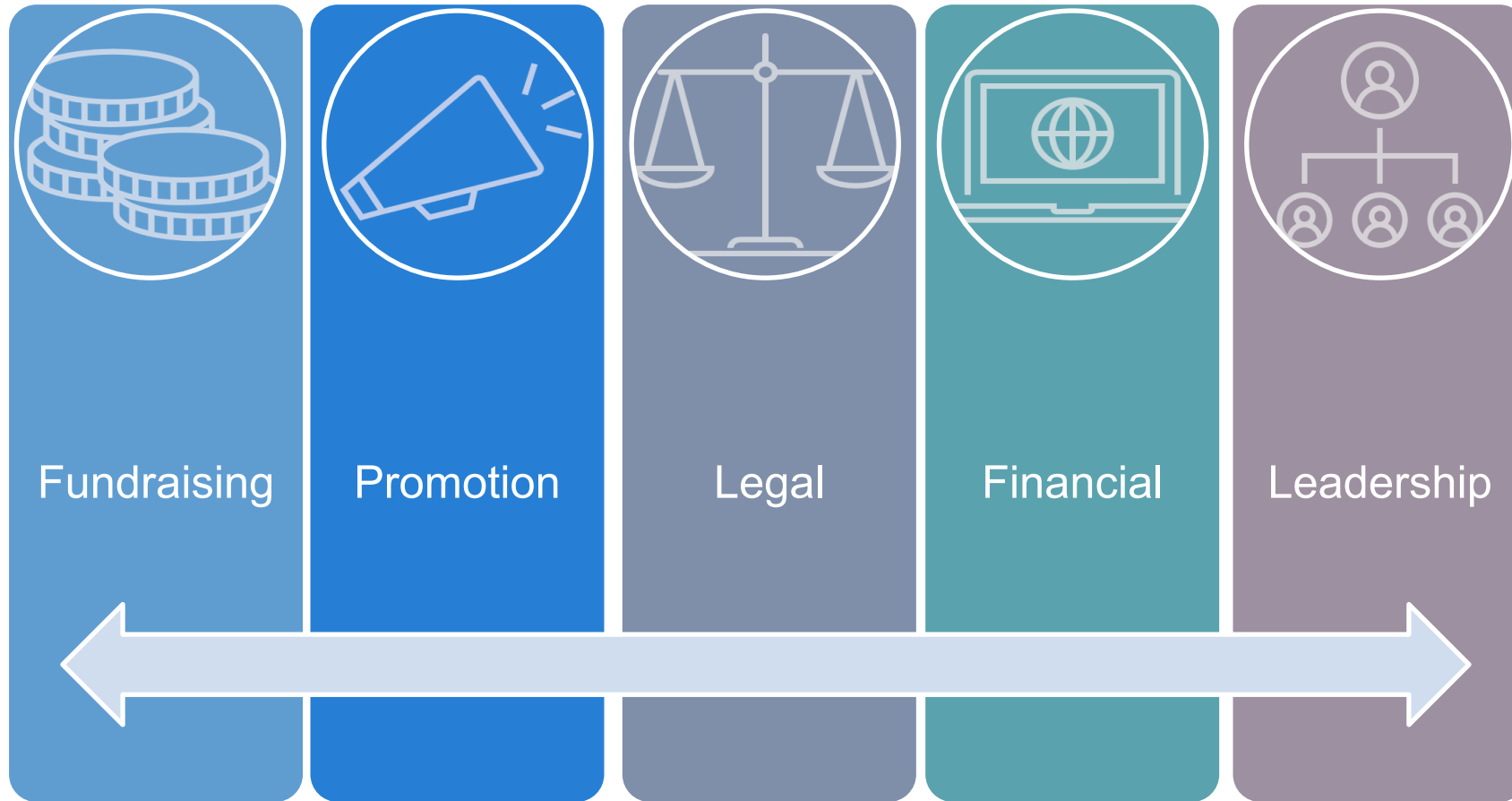
Tue, Jun 17 • 6:30 PM EDT

Free

sample list of workshops, please visit nphd.org for current schedule

HELPDESK FOR A VARIETY OF NEEDS

REQUEST SUPPORT BY COMPLETING A FORM AT WWW.NPHD.ORG!



Co-Sponsored by
Council Member
Susan Zhuang
District 43



Nonprofits:
We're Here to
Help YOU

Co-Sponsored by
Council Member
Inna Vernikov
District 48



Nonprofits:
We're Here to
Help YOU

Co-Hosted by
Council Member
Harvey Epstein
District 2



Nonprofits:
We're Here to
Help YOU

Co-Hosted by
Council Member
Amanda Farías
District 18



Nonprofits:
We're Here to
Help YOU

Co-Hosted by
Council Member
Alexa Avilés
District 38



Nonprofits:
We're Here to
Help YOU

The NonProfit HelpDesk's 2025-26 presentation series and technical support is funded through generous allocations from New York City Council Members including:

Farah Louis

Inna Vernikov

Susan Zhuang

Former Speaker Adrienne E. Adams

Former Justin Brannan



Mayor's Office of Contract Services (MOCS)

Abram D. Rodriguez

AmeriCorps Civic Corps Member
(Learning and Development)

Grace Govan (*she/her/hers*)

Analyst, Service Desk Operations
(Nonprofit Specialist)



Nonprofits:
We're Here to
Help YOU

Getting Prequalified for Discretionary Award Clearance

May 19, 2026

About the Mayor's Office of Contract Services (MOCS)

MOCS Balances Citywide Service and Oversight Responsibilities



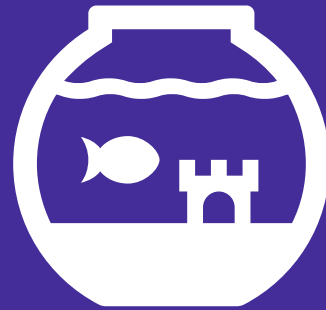
AGENCY SUPPORT

Full-scale support for procurement leaders and agency executives



PASSPORT

Central Platform: Streamlining compliance and collaboration



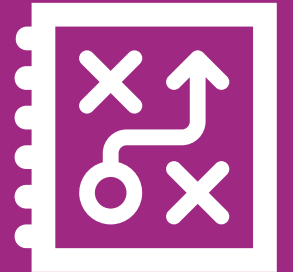
TRANSPARENCY

Leads to improved service and performance



VENDOR PARTNERSHIP

Partner with vendors to level playing field and adopt smart City policies

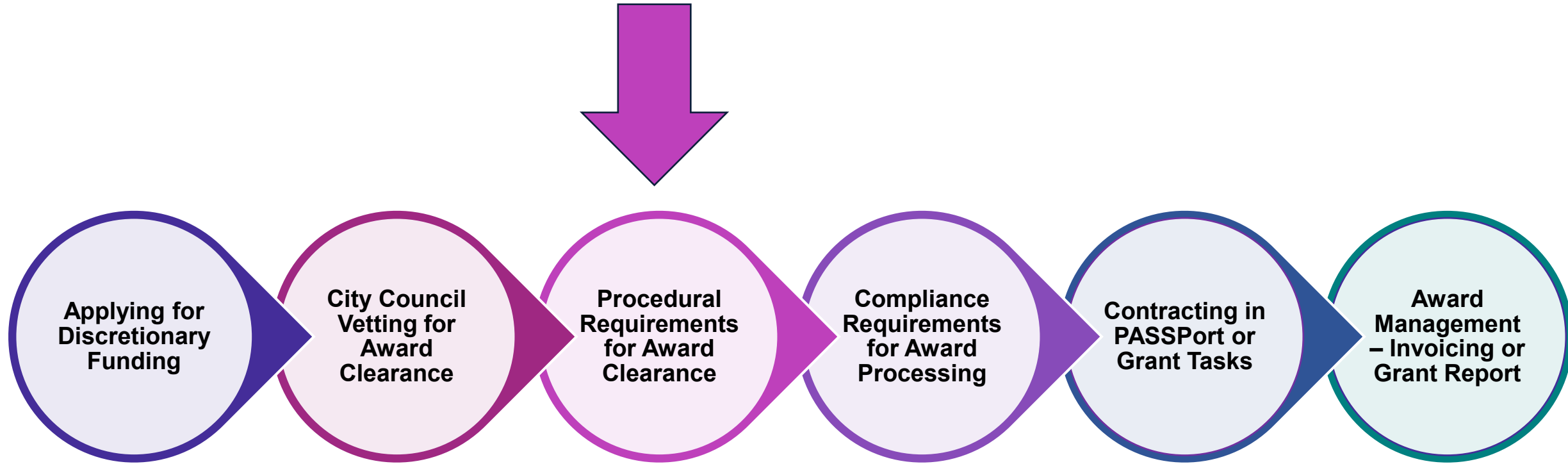


IMPROVEMENT

Leverage data to drive continuous improvement within Agencies and Citywide

- 1 Discretionary Award Procedural Requirements
- 2 Compliance Requirements and Processing
- 3 Resources
- 4 Q&A

Discretionary Funding Process Overview

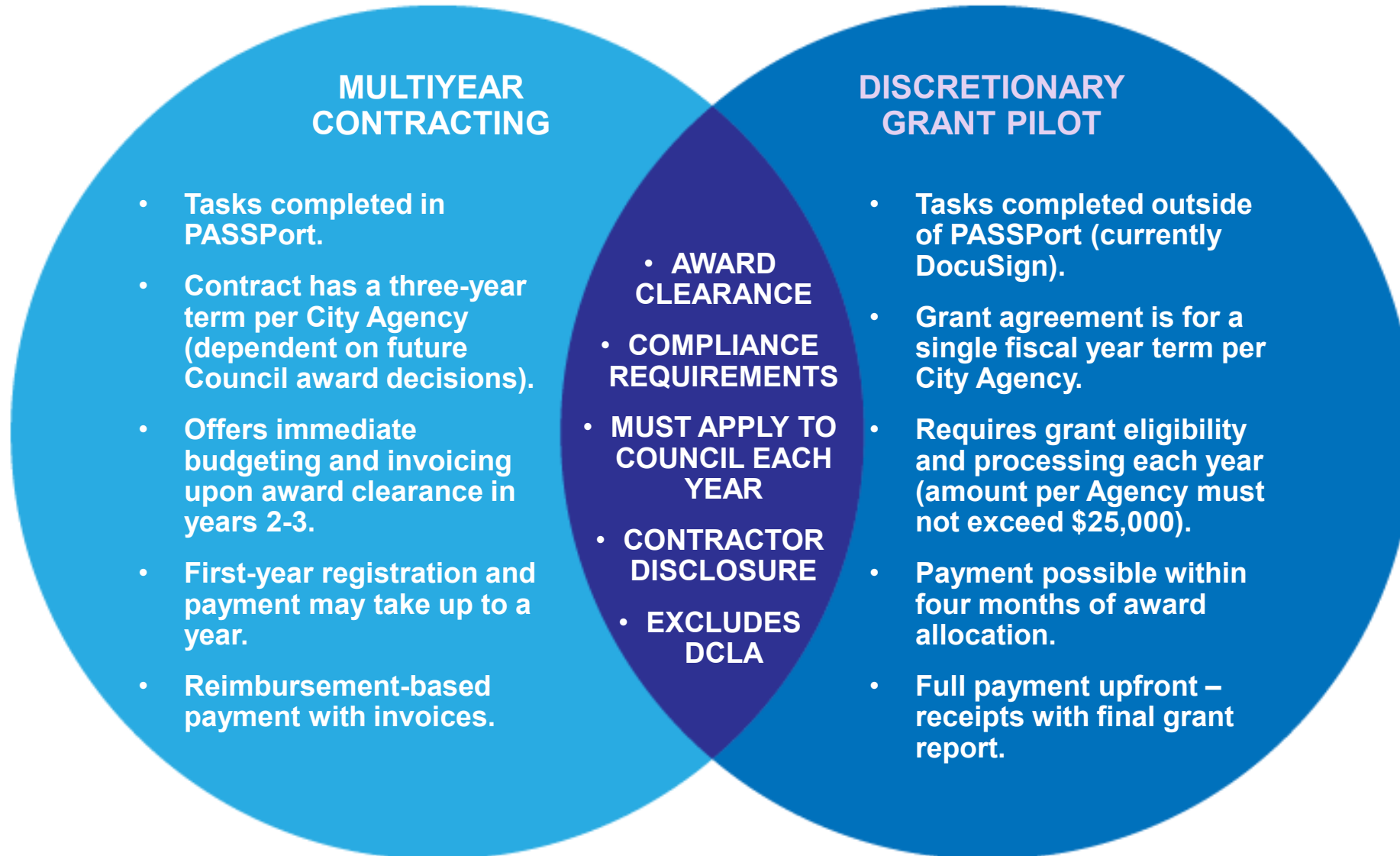


Discretionary Award Procedural Requirements



Contracting in PASSPort or Grant Tasks

Multiyear Contracting vs. Discretionary Grant Pilot



Create PASSPort Account

What is PASSPort?



PASSPort
Procurement and Sourcing Solutions Portal

- PASSPort is the City's system for managing procurement.

PASSPort Accounts



- Organizations have **PASSPort accounts**
- **Contacts/Users:** individuals within the organization who have access that account.
- **Profiles/User Roles:** different privileges that allow users to complete different tasks in PASSPort.

Requesting a PASSPort Vendor Account

After the PASSPort Account is created . . .



Vendor Admin: The Most Powerful Role

To-do List:

Log into PASSPort

- nyc.gov/passport

Update Basic information in Vendor Profile

- Click on **Profile > Vendor Profile**. Go to **Basic Information** section. Complete all required fields then press **Save**.

Update Contacts – Vendor Admin only

- Click on **Contacts > Add Contacts >** Assign them a Role in the **Profile** column

Start working on a Prequalification Application.

Prequalification Basics

Prequalification Application Options

Choose the Prequalification (PQL) application that works best for your organization:

Discretionary PQL Application:



- Discretionary Funding ONLY

HHS PQL Application:



- Discretionary Funding
- Human Services contracts



You don't need to complete both applications!

PQL Application Process



Find the
Prequalified List



Create New or
Update Expired
Application



Complete
Questionnaire



Submit Filings
Documents

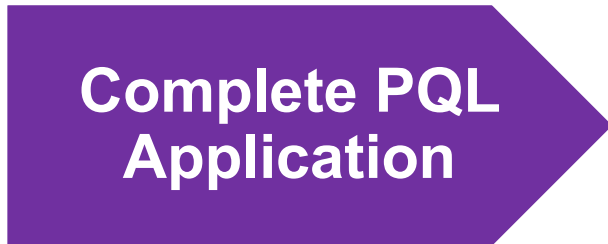


Sign and Submit
Completed PQL
Application



Monitor
Application
Status

Who Should Be Doing What?

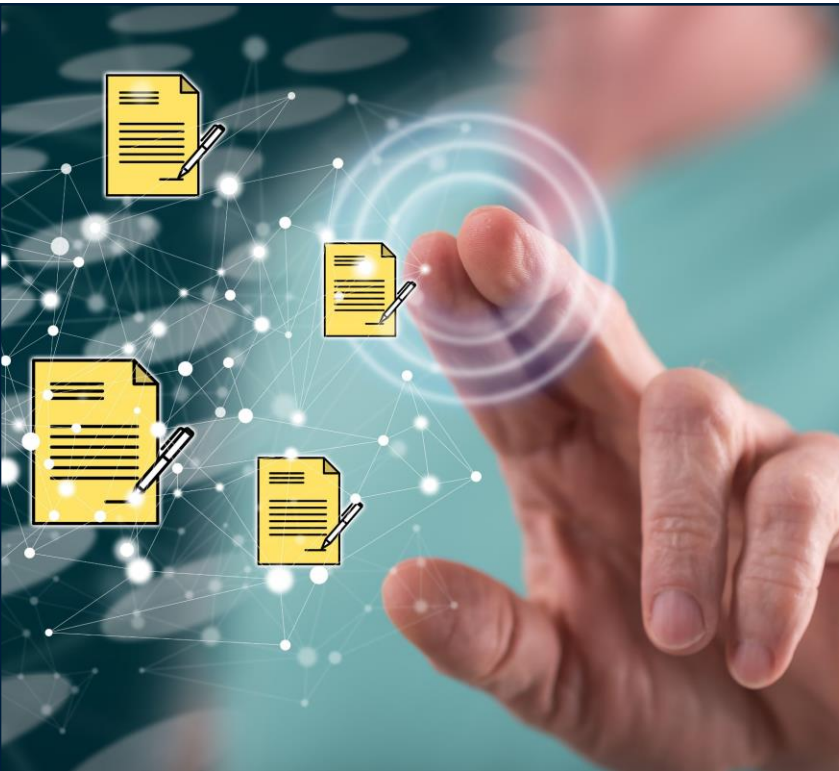


Best Practices for Completing PQL Applications

1 Identify the documents you need.

2 Prepare, format, and label your documents.

3 Complete PQL Application in PASSPort.



Identify Documents for the Questionnaire

HHS PQL Questionnaire Documents



Certificate of Incorporation (or equivalent)



Corporate By-Laws



Board of Directors List



IRS Letter of Determination, 501(c)3



Your Organization's Conflict of Interest Policy



Your Organization's Whistleblower Policy

Discretionary PQL Questionnaire Documents



Board of Directors List



Your Organization's Conflict of Interest Policy

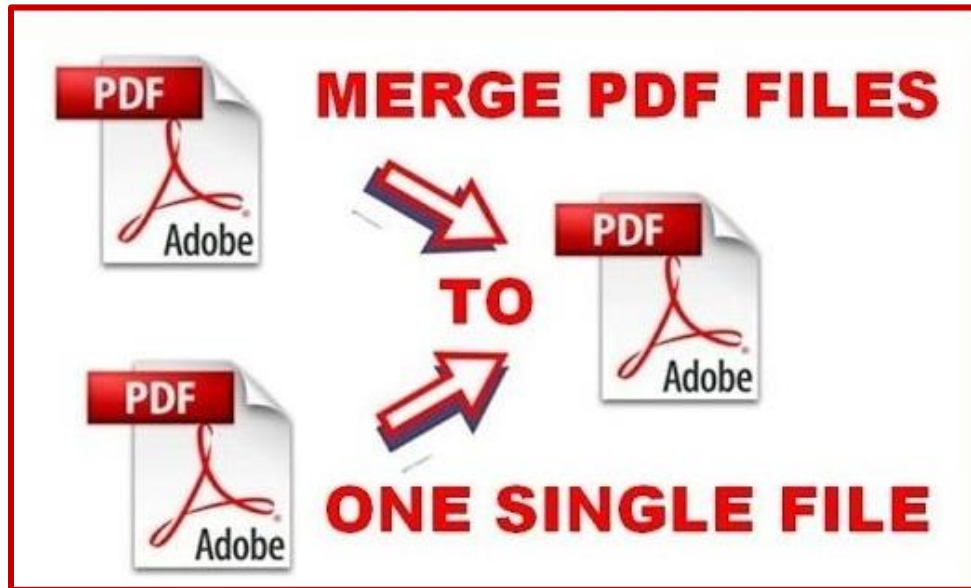
Identify Required NYS Charities Filings Document for Upload

Required filings documents for nonprofits depend on your **organization's revenue and other factors.**

| Required Filings Documents by NYS Charities Bureau & HHS Prequalification | | | | | | | |
|---|---------|---------|--------------|---------------------|----------------------------------|------------------------------|---|
| Type of Nonprofit Organization | CHAR410 | CHAR500 | IRS 990 Form | CPA Reviewed Report | CPA Audited Financial Statements | 12-Month Financial Statement | Exemption or Request Letter (on letterhead) |
| New to Filing with NYS Charities Bureau (within the last year) | Yes | | | | | | |
| Revenue is \$25K & under | | Yes | | | | | |
| Revenue is over \$25K to \$250K | | Yes | Yes | | | | |
| Revenue is over \$250K to \$1M | | Yes | Yes | Yes | | | |
| Revenue is over \$1M | | Yes | Yes | | Yes | | |
| Exempt from Filing w/ Charities Bureau (determined by the Charities Bureau) | | | | | | Yes | Yes |
| Requested 30-Day Extension to File | | Yes | Yes | | | | Yes |

Prepare Questionnaire and Filings Documents

If you're asked to upload more than one document type, then they must be **combined into one PDF** for upload.



Popular options for merging PDF documents:

- Adobe Acrobat Online
- iLovePDF
- Smallpdf
- PDF24

Working Within PASSPort

Finding the Prequalified List in PASSPort

The screenshot shows the PASSPortCentral interface. The top navigation bar includes 'PASSPortCentral', 'Profile', 'Tasks', 'RFx', 'Contracts', 'Ordering', 'Catalogs', 'Financials', 'Performance', and 'Support'. The 'RFx' menu is open, showing options: 'Browse My RFx Responses', 'Browse Public RFx', 'Browse Prequalified Lists' (highlighted with a red box and a red circle with the number 1), and 'Browse Real-Time Bidding Events'. Below the menu are buttons for 'Vendor Contacts', 'Vendor Information', 'Commodity Enrollment', 'Browse Public Rfx', and 'Create Invoice'. The main content area shows an 'Announcement' section with the text 'Welcome to the Procurement and Sourcing Solutions Portal (PASSPort)!'. Below this is the 'Browse Prequalified Lists' section, which contains search filters. A red circle with the number 2 highlights the 'Keywords' field, which contains 'HHS'. A red circle with the number 3 highlights the 'Search' button. The filters include 'Keywords', 'Industry', 'Commodity', 'Open Date' (From and To), 'Availability Status' (Open, Closed, Approval Required, Citywide Only, Prerequisite PQL), 'Current Status', 'Application Activity', 'Source', and 'Alerts'. At the bottom, there is a 'Filters' section showing 'Keywords: HHS', 'Availability Status: Open', and 'Closed'.

- “HHS” or “101”
- “Discretionary” or “164”

Opening the Prequalification List

HHS Prequalification List

← ↻ ☆ Browse Prequalified Lists

Keywords: HHS Industry: Commodity:

Open Date: From To

Availability Status: Open x Closed x Approval Required Citywide Only

Current Status: Application Activity: Source:

Filters Keywords: HHS x Availability Status: Open x Closed x

| PQL ID | PQL Label | Prerequisite PQL | Citywide | Industry | Commodity |
|-------------|----------------------------------|--------------------------|-------------------------------------|----------------------|-----------|
| 4 PQL000101 | HHS Accelerator Prequalification | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Human/Client Service | |

Discretionary Prequalification List

← ↻ ☆ Browse Prequalified Lists

Keywords: dis Industry: Commodity:

Open Date: From To

Availability Status: Open x Closed x Approval Required Citywide Only

Current Status: Application Activity: Source:

Filters Keywords: dis x Availability Status: Open x Closed x

| PQL ID | PQL Label | Prerequisite PQL | Citywide | Industry | Commodity |
|-------------|--------------------------------|--------------------------|-------------------------------------|----------------------|-----------|
| 4 PQL000164 | Discretionary Prequalification | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Human/Client Service | |

Create a New or Update an Existing Application

The button shown in the **Overview** tab of the PQL depends on your organization's history with the selected Prequalification List.

Create New Application

The screenshot shows the 'Overview' tab for PQL000164:Discretionary Prequalification. A blue button labeled 'Create New Application' is highlighted with a red box. The left sidebar contains 'Overview', 'Questionnaire', and 'Documents'. The main content area shows 'PQL Information' with fields for PQL ID (PQL000164), Prerequisite PQL ID, PQL Label (Discretionary Prequalification), Citywide (checked), and Source (PASSPort).

Update Application

The screenshot shows the 'Overview' tab for PQA010198:HHS Accelerator Prequalification. A blue button labeled 'Update Application' is highlighted with a red box. The left sidebar contains 'Overview', 'Questionnaire', 'Documents', and 'Application History'. The main content area shows 'PQL Information' with fields for PQL ID (PQL000101), Availability (Open), PQL Label (HHS Accelerator Prequalification), Industry (Human/Client Service), Commodities, Managing Agency (OFFICE OF CONTRACT SERVICES), Citywide (checked), Open Date (8/26/2021), Source (PASSPort), and Close Date.

Access the Questionnaire

PQA010634:HHS Accelerator Prequalification

Save Save and Close Submit for Review Cancel Application Close

1

Questionnaire

Overview

Documents

Application History

Overview

Business Information 0 / 1

Response Overview

| PQL Label | Label |
|----------------------------------|--|
| HHS Accelerator Prequalification | HHS Accelerator Prequalification-Test Vendor PASSPort Organization |
| Respondent | |

Creation By Import

Download in Excel 2007-2010 format (xlsx)

Download in Excel 97-2003 format (xls)

Drop here your answer (in Excel format)

Click or Drag to add a file

2

Access Questionnaire

Uploading Filings Documents

- Overview
- Questionnaire
- Documents**
- Application History

Save Save and Close Submit for Review Cancel Application Close

Required Documents

Manage Documents

| Document Type | Document Label | Document Name | Last Modified By | Last Modified Date (Your Local Time) | Status | Begin Date | Expiration Date | Validity |
|-------------------------------|--|---------------|------------------|--------------------------------------|----------------|------------|-----------------|----------|
| Financial Statement or Report | Filings Document (i.e. Charities or Financial Statement) | Vendor Demo | | | Pending upload | | | |

Manage Document

Close

| Document Type | Document Name | File | Agency Label | Status | Upload Date | Last Modified |
|-------------------------------------|-------------------------------|------------------------------------|--------------|----------------|--------------|---------------|
| REQUESTED | | | | | | |
| <input checked="" type="checkbox"/> | Financial Statement or Report | 3 Link File | -- | PENDING UPLOAD | Oct 24, 2024 | Oct 28, 2024 |

- Upload from Computer
- Link from PASSPort Vault

4

Submit for Review

Once all the requirements are met, submit the Application for Review.

PQA018332:Discretionary Prequalification

Save Save and Close **Submit for Review** Cancel Application Close

PQL Information

| | | | |
|--|--------------------------------|---------------------|----------|
| PQL ID | PQL000164 | Availability | Open |
| PQL Label | Discretionary Prequalification | | |
| Industry | Human/Client Service | Commodities | |
| Managing Agency | OFFICE OF CONTRACT SERVICES | | |
| <input checked="" type="checkbox"/> Citywide | | Open Date | 4/1/2025 |
| Source | PASSPort | Close Date | |

What happens after you submit your PQL Application?



1. MOCS reviews and makes a determination.



2. PASSPort email notification is sent to your NYC.ID email address.

- If **Approved**: You have completed the HHS Prequalification requirement.
- If **Returned**: Reviewer comments will be included in the message.



3. Maintain your Prequalification!

Resources

Learn PASSPort Resources Library

The screenshot shows the 'Learn PASSPort' section of the website. The main heading is 'Resources Library'. Below it, there's a navigation menu with 'About PASSPort', 'Learn PASSPort', and 'PASSPort Financials'. The left sidebar contains links for 'Resources Library', 'FAQ', 'Trainings', 'Procurement 101', and 'Requirements Contract'. The main content area is titled 'Resources Library' and includes an introductory paragraph, a link to training materials, a guide for 'DYCD COMPASS RFP', and a 'Get Ready to Do Business' section. The 'Get Ready to Do Business' section includes a sub-heading 'Create an account and get Filed in PASSPort.' and four guide cards: 'Create a PASSPort Account', 'Checklist for Vendor Admins: Manage Your Organization's PASSPort Account', 'Add Users and Assign Roles', and 'PASSPort Frequently Asked Questions'. A 'Get Filed' section follows, explaining the vendor enrollment process. A purple-bordered box on the right side of the screenshot highlights a list of resources: 'Get Ready to Do Business' (with sub-items 'Get Filed', 'Show the City Who You Are', 'Update Your Account', 'PASSPort Vault', 'Find Contract Opportunities', 'Discretionary Funding', 'Respond to Contract Opportunities', 'Complete Contract Award Tasks', 'Subcontract Management', 'Get Paid', 'End of Contract Tasks', and 'Support').

About PASSPort | **Learn PASSPort** | PASSPort Financials

Resources Library

FAQ

Trainings

Procurement 101

Requirements Contract

Share | Print

Resources Library

Explore our step-by-step guides to help you confidently navigate the contracting process in PASSPort.

Interested in participating in our workshops and webinars?
[Learn more about our trainings and watch recordings of past webinars!](#)

DYCD COMPASS RFP: Planning to submit a proposal? This guide walks you through how to get started and submit your response in PASSPort: [COMPASS RFP: Five Steps to Get Ready and Submit Your Proposal in PASSPort \(PDF\)](#).

Last updated: October 9, 2025.

Get Ready to Do Business

Create an account and get Filed in PASSPort.

- Guide: [Create a PASSPort Account](#)
- Guide: [Checklist for Vendor Admins: Manage Your Organization's PASSPort Account](#)
- Guide: [Add Users and Assign Roles](#)
Learn how to add and edit contacts in your Vendor Profile.
- Reference: [PASSPort Frequently Asked Questions](#)

Get Filed

PASSPort Vendor Enrollment (also referred to as getting Filed in PASSPort) is necessary for the City to understand how you plan to conduct business with them. To get Filed in PASSPort, you answer business-related questions and submit the required disclosures.

Please use the guide and glossary below to learn how to:

- ▶ [Get Ready to Do Business](#)
 - ▷ [Get Filed](#)
 - ▶ [Show the City Who You Are](#)
 - ▶ [Update Your Account](#)
 - ▶ [PASSPort Vault](#)
 - ▶ [Find Contract Opportunities](#)
 - ▷ [En Español](#)
 - ▶ [Discretionary Funding](#)
 - ▶ [Respond to Contract Opportunities](#)
 - ▷ [En Español](#)
 - ▶ [Complete Contract Award Tasks](#)
 - ▷ [En Español](#)
 - ▶ [Subcontract Management](#)
 - ▷ [For Prime Vendors](#)
 - ▷ [For Subcontractors](#)
 - ▶ [Get Paid](#)
 - ▶ [End of Contract Tasks](#)
 - ▶ [Support](#)

- ▶ [Get Ready to Do Business](#)
 - ▷ [Get Filed](#)
- ▶ [Show the City Who You Are](#)
- ▶ [Update Your Account](#)
- ▶ [PASSPort Vault](#)
- ▶ [Find Contract Opportunities](#)
 - ▷ [En Español](#)
- ▶ [Discretionary Funding](#)
- ▶ [Respond to Contract Opportunities](#)
 - ▷ [En Español](#)
- ▶ [Complete Contract Award Tasks](#)
 - ▷ [En Español](#)
- ▶ [Subcontract Management](#)
 - ▷ [For Prime Vendors](#)
 - ▷ [For Subcontractors](#)
- ▶ [Get Paid](#)
- ▶ [End of Contract Tasks](#)
- ▶ [Support](#)

Support

If you need assistance beyond what's listed here, submit an inquiry to the [MOCS Service Desk](#).

Guide

MOCS Service Desk Portal User Guide (PDF)

Create a portal account to easily monitor your support tickets.

- ▶ [Get Ready to Do Business](#)
 - ▷ [Get Filed](#)
- ▶ [Show the City Who You Are](#)
- ▶ [Update Your Account](#)
- ▶ [PASSPort Vault](#)
- ▶ [Find Contract Opportunities](#)
 - ▷ [En Español](#)
- ▶ [Discretionary Funding](#)
- ▶ [Respond to Contract Opportunities](#)
 - ▷ [En Español](#)
- ▶ [Complete Contract Award Tasks](#)
 - ▷ [En Español](#)
- ▶ [Subcontract Management](#)
 - ▷ [For Prime Vendors](#)
 - ▷ [For Subcontractors](#)
- ▶ [Get Paid](#)
- ▶ [Track Your Activity: Vendor Reporting](#)
- ▶ [End of Contract Tasks](#)
- ▶ [Support](#)

NPO Discretionary Office Hours

Does your organization have questions about a discretionary contract or pending tasks in PASSPort?

Our team can help with the following:

- **Vendor Document Submission:** Upload documents, enter Sites, and complete Local Law 34 Compliance.
- **Budget Completion:** Create and modify a budget for agency review and approval.
- **Invoice Management:** Submit invoices against an approved budget.

Register today!



Resources

City Council Discretionary Funding

- council.nyc.gov/budget

PASSPort Login and account Creation

- nyc.gov/passport

Discretionary Award Tracker

- nyc.gov/tracker

PASSPort Resources Library

- nyc.gov/learnpassport

MOCS Help

- nyc.gov/mocshelp

MOCS Trainings

- mocsvendortraining.eventbrite.com

Q & A

NEED MORE HELP?

VISIT WWW.NPHD.ORG AND
CLICK 'REQUEST HELPDESK SUPPORT'
TO COMPLETE FORM



YOUR FEEDBACK
MATTERS!

**SCAN HERE
FOR A
SURVEY!**

THANKS FOR JOINING US!

- Tamara Keshecki
- Owner, AINOK Consulting LLC
- <https://www.ainokconsulting.com/>
- <https://www.linkedin.com/in/tamara-keshecki/>

NEED MORE HELP?

VISIT WWW.NPHD.ORG AND
CLICK 'REQUEST HELPDESK SUPPORT'
TO COMPLETE FORM