

HHS Prequalification Revisions: Resubmit the Financial Document

MOCS reviews all HHS Prequalification (PQL) Applications and gives vendors details as to what revisions are needed for HHS PQL approval. Vendors who have their HHS PQL application **returned for revisions** are commonly required to revise and resubmit the Financial Statement or Report in the Documents tab. This guide goes over those common revisions reasons and how to revise them. For more background on HHS Prequalification, refer to the [Submit the HHS Prequalification Application and Renew the HHS Prequalification guides](#) on the MOCS website. For steps to replace documents in the questionnaire, see the steps 3 & 4 in the sections for [nonprofit](#) or [for profit](#) questionnaire in [this guide](#).

[Before We Begin](#)

[Returned Reasons](#)

[Access Manage Documents](#)

[Unlink a Document](#)

[Add a New Required Document](#)

[Link a Document via the Vault](#)

[Upload New Financial Document](#)

[Change Start and End Dates](#)

[Resubmit PQL Application for Review](#)

[Appendix](#)

[Appendix: Required Documents for Nonprofit Filers](#)

[Appendix: Validity End Dates](#)

[Appendix: Certificate of Incorporation and Equivalent Documents](#)

Before We Begin

The steps below can be completed by users provisioned with the roles:

- **Vendor Admin**
- **Vendor Procurement L1** (cannot submit application to MOCS)
- **Vendor Procurement L2**

[Back to Top](#)

Reasons for Returned Required Documents

There are some common **reasons** an HHS PQL Application is returned to vendors. The reasons below are **specific to the [Financial Statement or Report](#)** in the Documents tab. Vendors will find that they may need to address one or all of the following concerns for their Financial Statement or Report:

- Incorrect [Start and/or End Date](#) of Financial Statement or Report.
- **Dates** within the Charities Filing (CHAR500, 990, and Audit) do not align or are incorrect.
- **Date** missing next to signature in Charities Filing (CHAR500).
- **Date** and **signature** missing in Charities Filing (CHAR500).

To solve these, it is important to first [unlink the existing document](#) in the PQL application, then [upload a new file](#), [link a new file from the Vault](#) or [change the validity dates](#) on the current document.

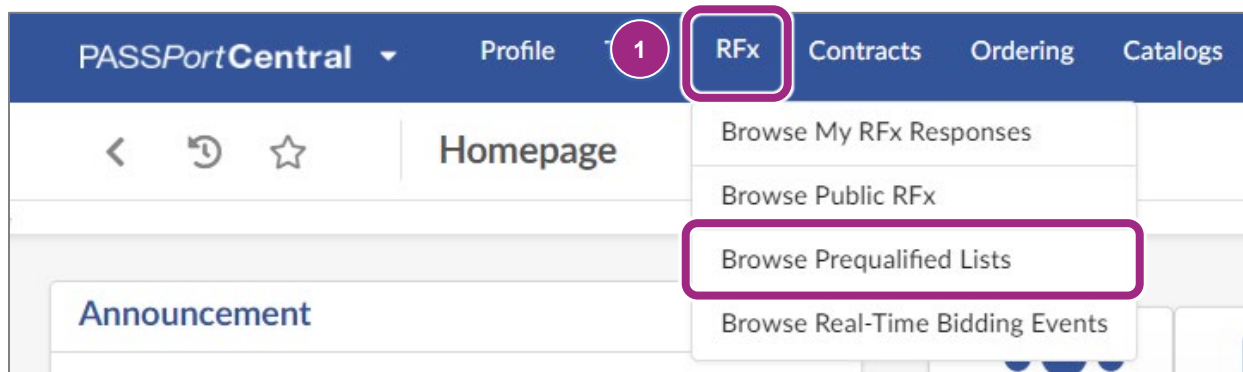
[Back to Top](#)

Access Manage Documents

Go to your returned HHS Prequalification Application to access the Documents tab's Manage Documents section and make revisions to returned documents. Vendor Admin and Vendor Procurement L2 can complete all the actions in this section and guide.

Note: Users with Vendor Procurement L1 may only complete the steps in this section after the PQL application is returned to Vendor L1 Draft.

1. From the PASSPort Homepage, or anywhere in PASSPort Central, click (or hover over) **RFx** in the top navigation and select **Browse Prequalified Lists** from the drop-down menu.



The Browse Prequalified Lists page displays.

- To search for the HHS Accelerator Prequalification list, type “hhs” or “101” in the **Keywords** field.
- Click the **Search** button and the list will display in the table below the search parameters.
- Click the **PQL ID** or **PQL Label** to view the returned HHS PQL application.

PASSPortCentral Profile Tasks RFx Contracts Ordering Catalogs Financials Performance Support Hhs I.

Browse Prequalified Lists

Keywords: **hhs** Industry: Commodity: **Search** Reset

Open Date: From To

Availability Status: Open Closed Approval Required Citywide Only Prerequisite PQL

Current Status: Application Activity: Source: Alerts:

Filters: Keywords: hhs Availability Status: Open Closed

PQL ID	PQL Label	Prerequisite PQL	Citywide	Industry	Commodity	Open Date	Availability	Approved Vendors	Source	Current Status
PQL000101	HHS Accelerator Prequalification		☒	Human/Client Service		8/26/2021	Open	0	PASSPort	Approval Required

1 Result(s)

The HHS PQL Application appears showing the Overview tab.

- At the bottom of the PQL's Overview tab, the Vendor Status section shows the Application ID, Current Status, Application Activity (in this situation Returned) and the Qualification Expiration Date.

PQA001266:HHS Accelerator Prequalification

Search

Save Save and Close Return to Vendor L1 Draft Sign and Submit Application Cancel Application Close

PQL Information

PQL ID: PQL000101 Availability: Open

PQL Label: HHS Accelerator Prequalification

Industry: Human/Client Service Commodities:

Managing Agency: OFFICE OF CONTRACT SERVICES

☒ Citywide Open Date: 8/26/2021

Source: PASSPort Close Date:

Approved Vendors: 0

Vendor Status

Application ID: PQA001266

Current Status: Approval Required

Application Activity: Returned

Qualification Expiration Date: ①

- Click the **Documents** tab in the left navigation to view the Required Documents section.
- Click the **Return to Vendor L1 Draft** button at the top of the page to edit this section.

PQA001266:HHS Accelerator Prequalification

Search

Save Save and Close Return to Vendor L1 Draft Sign and Submit Application Cancel Application Close

Required 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)	CHAR500 IRS 900 Audit FY2021	itops staff hhs	10/9/2024 10:33:23 AM	Uploaded	10/9/2024	11/15/2024	●

The page will refresh and the Manage Documents button becomes visible above the Required Documents section.

8. Click the **Manage Documents** button to edit Required Documents in this PQL application.

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PQA001266:HHS Accelerator Prequalification

Q Search

🖨

Overview

Questionnaire

Documents

Application History

Save

Save and Close

Submit for Review

Cancel Application

Close

Required Documents

Manage Documents8

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)	CHAR500 IRS 900 Audit FY2021	itops staff hhs	10/9/2024 10:33:23 AM	Uploaded	10/9/2024	11/15/2024	●

9. The Manage Document window opens. Here you will be able to **unlink and replace the current required document** attached to the application.

Manage Document

Close

i

Document Type	Document Name	File	Agency Label	Status	Upload Date	Last Modified	
REQUESTED							
Financial Statement or Report	CHAR500 IRS 900 Audit FY2021	CHAR500 IRS 900 Audit FY2021.docx	--	UPLOADED	Sep 19, 2024	Oct 09, 2024	⋮

Proceed to [unlink the returned document](#).

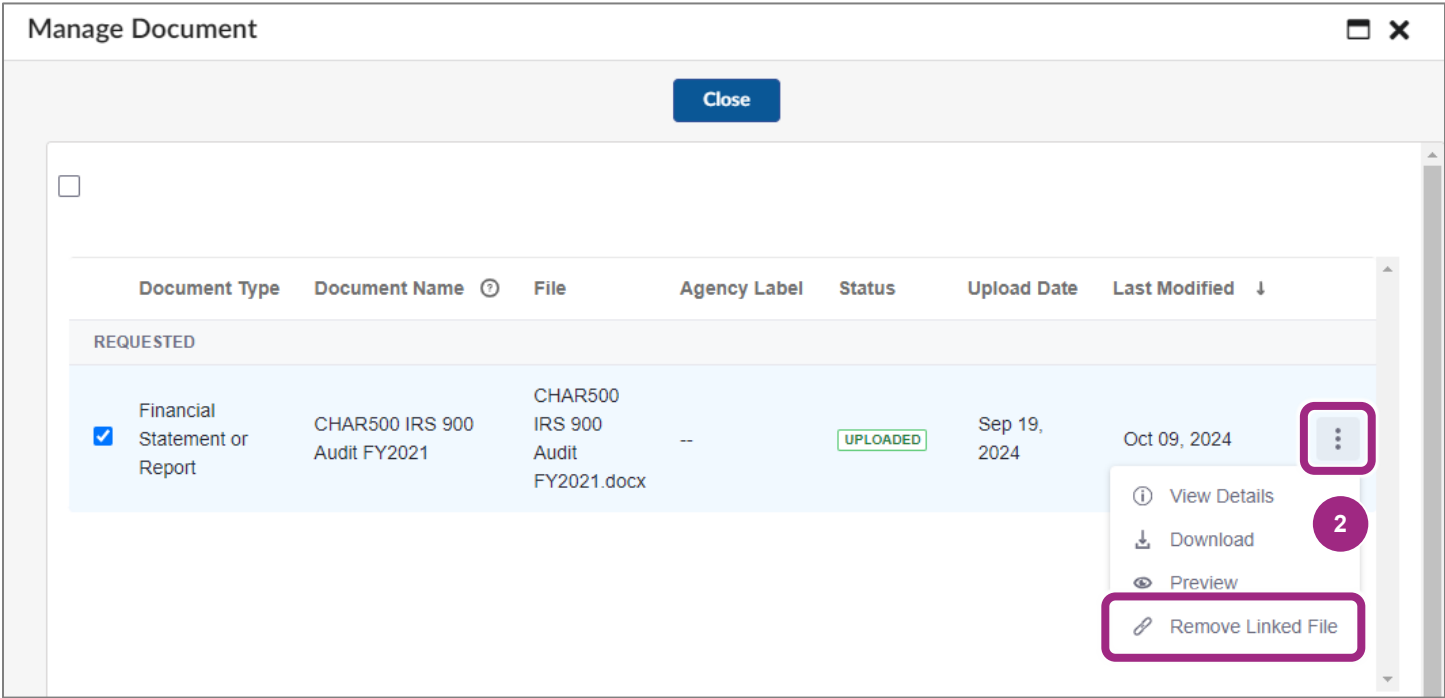
[Back to Top](#)

Unlink a Document

The Manage Document window enables vendors to remove a document from their returned HHS PQL application. This process is called unlinking. After the returned document is unlinked, you may proceed with replacing the document and editing the Validity period.

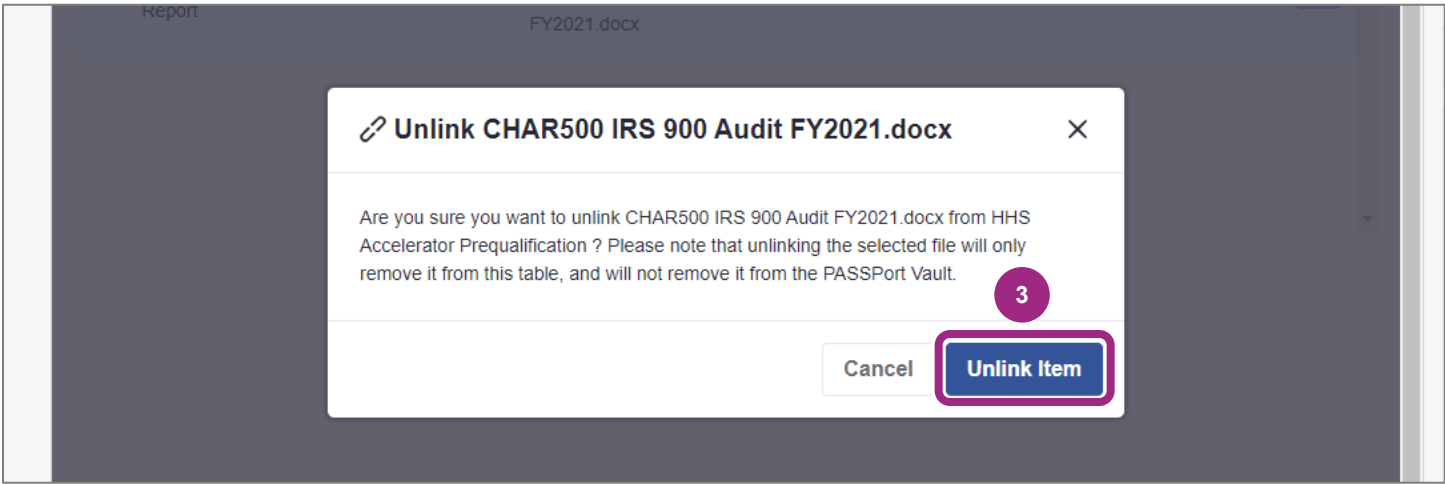
Follow the steps below to unlink the current document from the PQL application.

- 1. Follow the instructions in the [Access Manage Documents](#) section of this guide to open the Manage Document window.
- 2. To unlink your document, click the vertical **ellipsis** (3 dots) to the right of the document's Last Modified date. Click **Remove Linked File** from the drop-down menu.



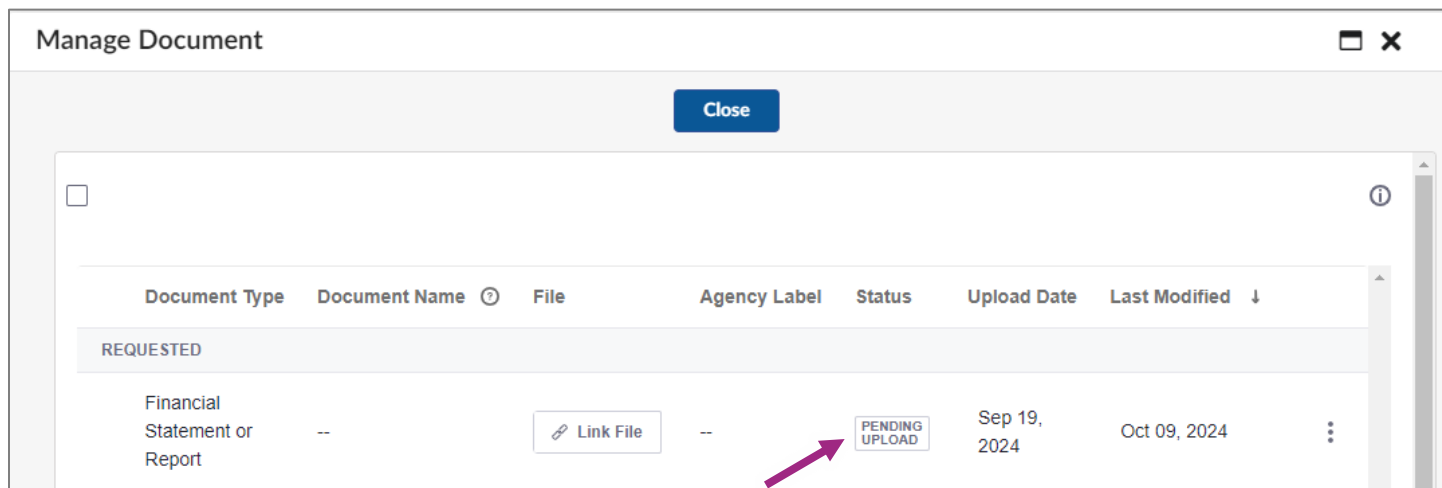
A pop-up window appears to confirm whether you wish to proceed with unlinking the document.

- 3. Click the **Unlink Item** button to proceed with unlinking the document from the PQL application.



The pop-up disappears and the Manage Document window becomes visible again.

4. The Requested Document's **Status** becomes Pending Upload meaning it is now possible to proceed with adding a new Financial Statement or Report via the Link File button.



To edit the Validity period of the unlinked document, proceed to [Change the Document Start and End Dates](#). Or proceed to [Add a New Required Document](#).

[Back to Top](#)

Add a New Required Document

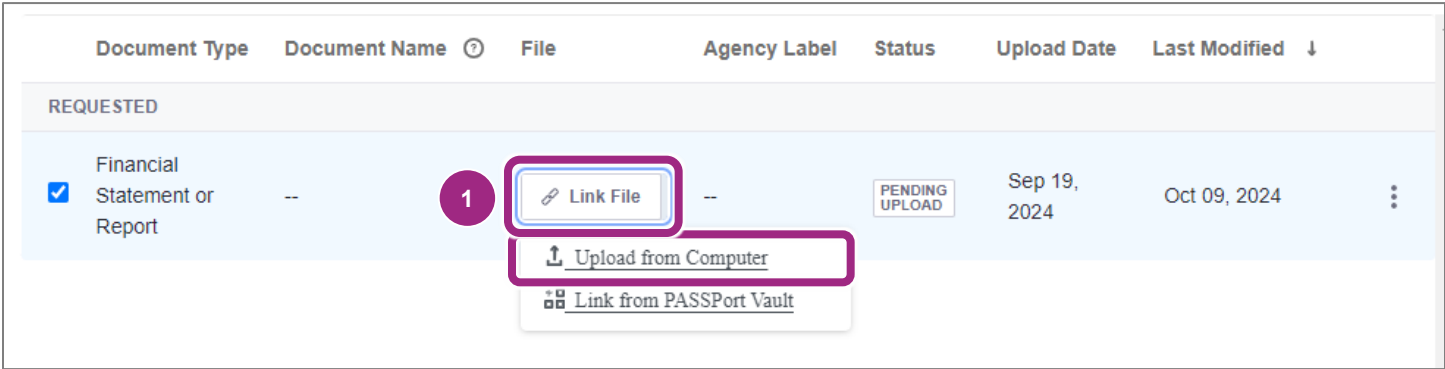
After unlinking the incorrect document, it's time to replace it with the [correct document](#) in one of two ways: 1) [Upload a document from your computer](#) or 2) [Link a different document from the Vault](#).

Important: Before proceeding, make sure the new document addresses all concerns raised by your MOCS Reviewer.

Option 1: Upload a Document From Your Computer

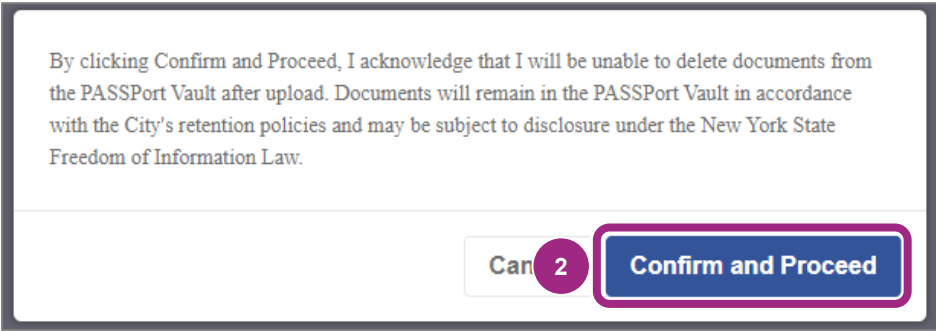
Choose this option if you need to upload the corrected [Financial Statement or Report](#) from your computer. Follow the instructions below to attach it to your PQL application.

1. Click the **Link File** button, then select **Upload from Computer** from the drop-down menu.



A window with a message appears. Confirm you understand that any files uploaded to the Vault cannot be deleted after upload in accordance with City record retention policies and may be subject to FOIL.

2. Read the message and click the **Confirm and Proceed** button to continue.



The Upload Document window displays.

3. Click the **Select Files** button to find and select the document on your computer.

Manage Document Close

Info: Documents may not be deleted from the PASSport Vault after upload. Documents will remain in the PASSport Vault in accordance with the City's retention policies and may be subject to disclosure under the New York State Freedom of Information Law.

Document

REQUESTED

Financial Statement of Report

Upload Document

File Selection Document Info Location Upload

1 2 3 4

File Selection

Drag and drop your files here to upload

Maximum 300MB file limit
Maximum 10 files

3 **Select Files**

Cancel Next

- After a file is selected from your computer, the name will display in the File Selection section. If the wrong file was selected, click the **X** to the right of the file listed and repeat step 3.
- Click the **Next** button to continue to the next Upload Document screen, Document Info.

The screenshot shows the 'Upload Document' dialog box with a progress bar at the top indicating four steps: File Selection (1), Document Info (2), Location (3), and Upload (4). Step 1 is active. Below the progress bar, the 'File Selection' section displays a file named 'CHAR500 IRS 900 Audit FY2024.pdf' with a red PDF icon. To the right of the file name is a close button (X). Below this is a large gray area with a cloud upload icon and the text 'Drag and drop your files here to upload'. Underneath, it specifies 'Maximum 300MB file limit' and 'Maximum 10 files', followed by a 'Select Files' button. At the bottom right, there are 'Cancel' and 'Next' buttons. A purple circle with the number 5 is placed over the 'Next' button. A purple arrow points from the file name to the close button (X).

- Optional: In Document Info, edit the **Document Name** by typing a new name in the text field.
- Click the **Document Type** drop-down and select **Financial Statement or Report** from the list.

The screenshot shows the 'Upload Document' dialog box at Step 2: Document Info. The progress bar at the top shows Step 1 as complete with a checkmark, and Step 2 as active. The 'DOCUMENT 1' section contains two fields: 'Document Name *' and 'Document Type *'. The 'Document Name' field contains 'CHAR500 IRS 900 Audit FY2024' and has a file type indicator '.pdf' to its right. The 'Document Type' field is a dropdown menu showing 'Financial Statement or Report'. Both fields are highlighted with a purple border. Purple circles with numbers 6 and 7 are placed over the 'Document Name' and 'Document Type' labels respectively.

8. Select the **Start Date** which will be the day of HHS PQL application submission.

9. Select the **End Date**.

Important: Nonprofits should select their **next annual Charities Bureau filing Due Date** (in most cases).

For-profit entities and nonprofits **exempt** from submitting annual Charities Bureau filings should choose the date 3 years from the application submission date.

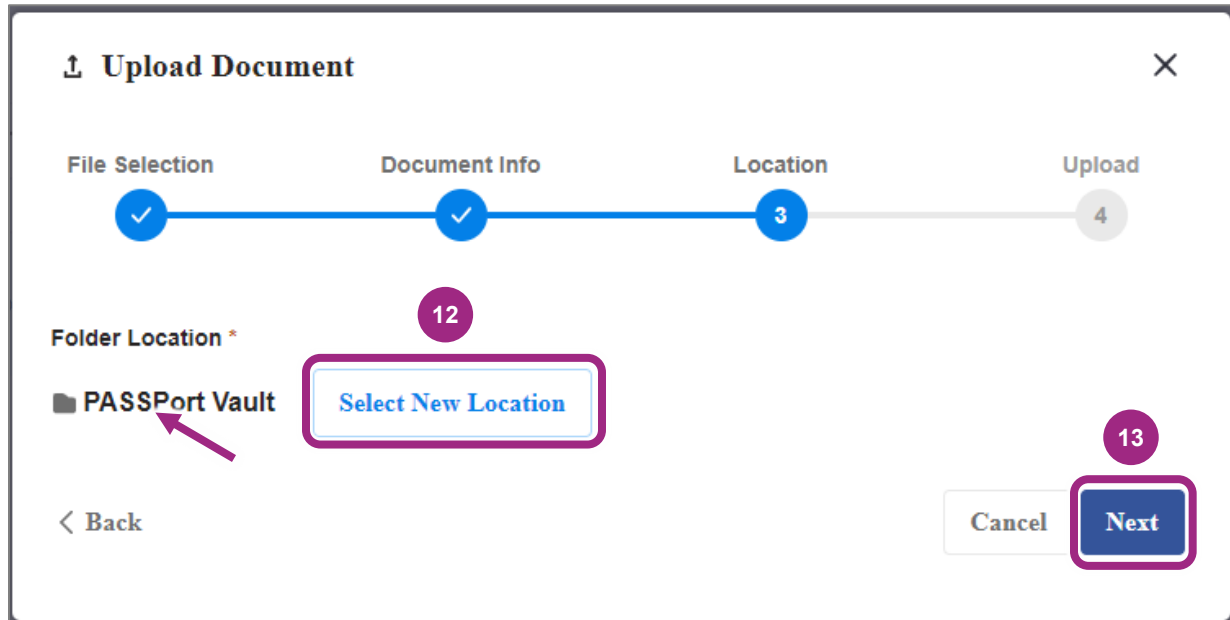
10. Optional: [Add tags](#) and a description to help you and your colleagues find this document in the Vault.

11. Click the **Next** button and proceed to the Location step.

The screenshot shows a form interface with the following elements and callouts:

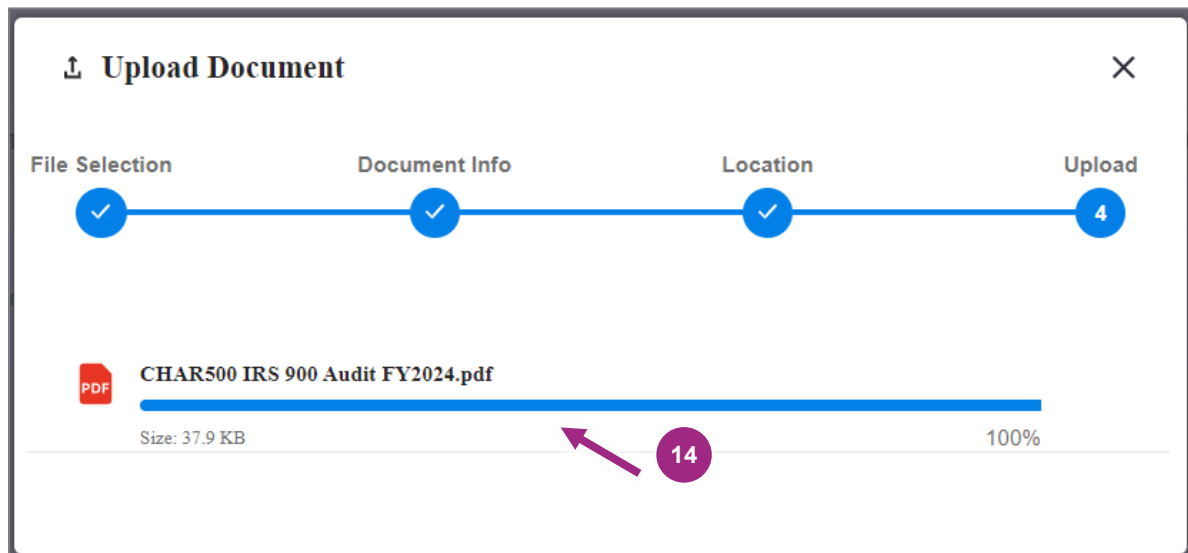
- Start Date *** (Callout 8): A date input field containing "10-10-2024" with a calendar icon.
- End Date *** (Callout 9): A date input field containing "05-15-2025" with a calendar icon.
- Tags** (Callout 10): A text area with the placeholder "Use a comma to enter tags".
- Description**: A larger text area below the tags field.
- Character Count**: A label "0/255 Characters" at the bottom of the description field.
- Navigation** (Callout 11): A "Back" button with a left arrow and a "Next" button (highlighted in blue) next to a "Cancel" button.

12. In Location, review the Folder Location which defaults to the main PASSPort Vault folder. To change the destination folder, click the **Select New Location** button and choose the new location.
13. Click the **Next** button to proceed to the final Upload step.



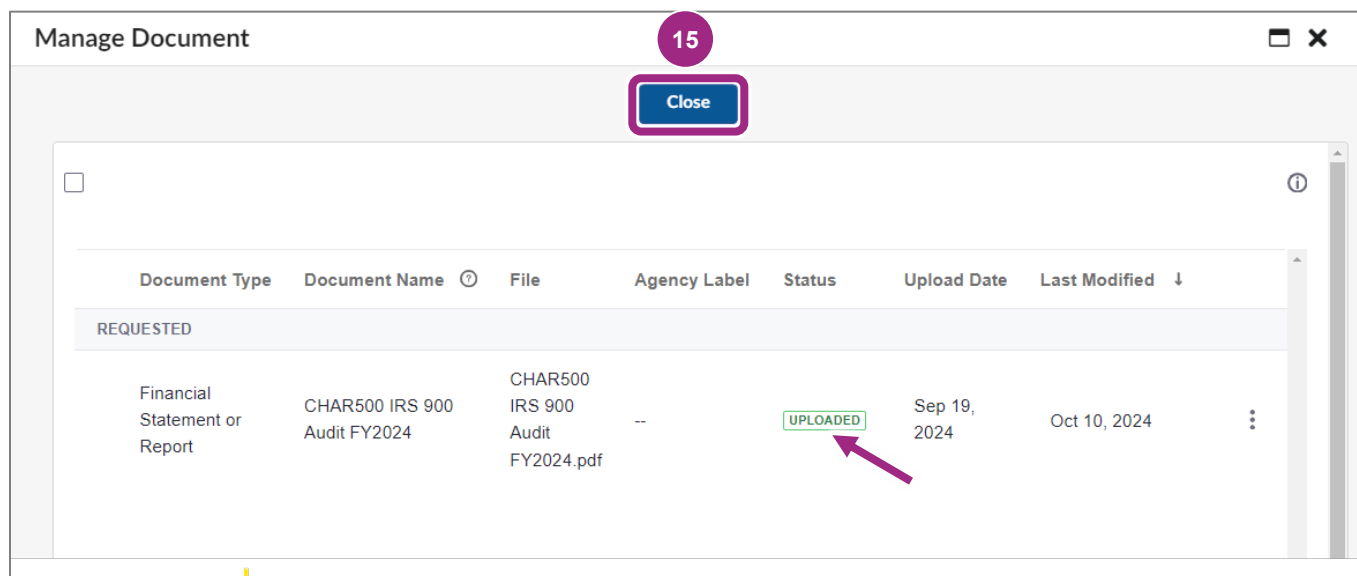
Tip: Refer to the [Vault Best Practices](#) guide on organizing documents and folders.

14. In Upload, a progress meter will display as the file uploads.



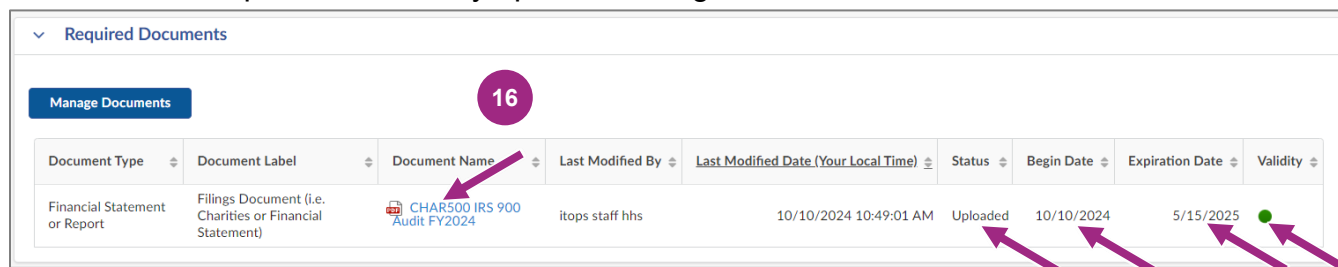
After 100% upload is achieved, you are returned to the Manage Documents window.

15. Review and confirm the correct file is uploaded, then click the **Close** button at the top of the window to return to the Documents tab.



16. In Required Documents, confirm the Document Name shows the uploaded file with the file icon in the table.

Note: The Start and End Dates appear in the table as the Begin and Expiration Dates. When the document expires, the Validity updates from green to red.



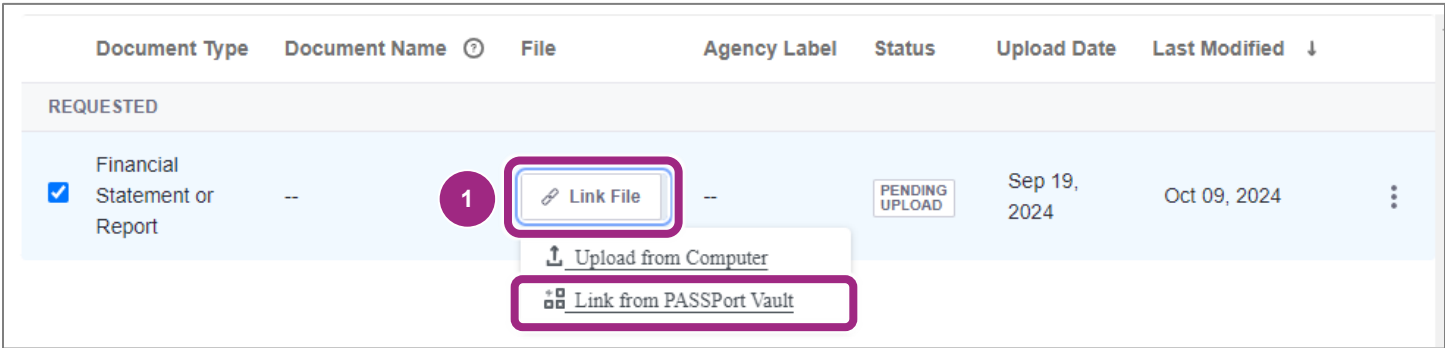
At this point, you can [resubmit your application](#) unless other revisions to the PQL application are needed.

[Back to Top](#)

Option 2: Link a Document Via the Vault

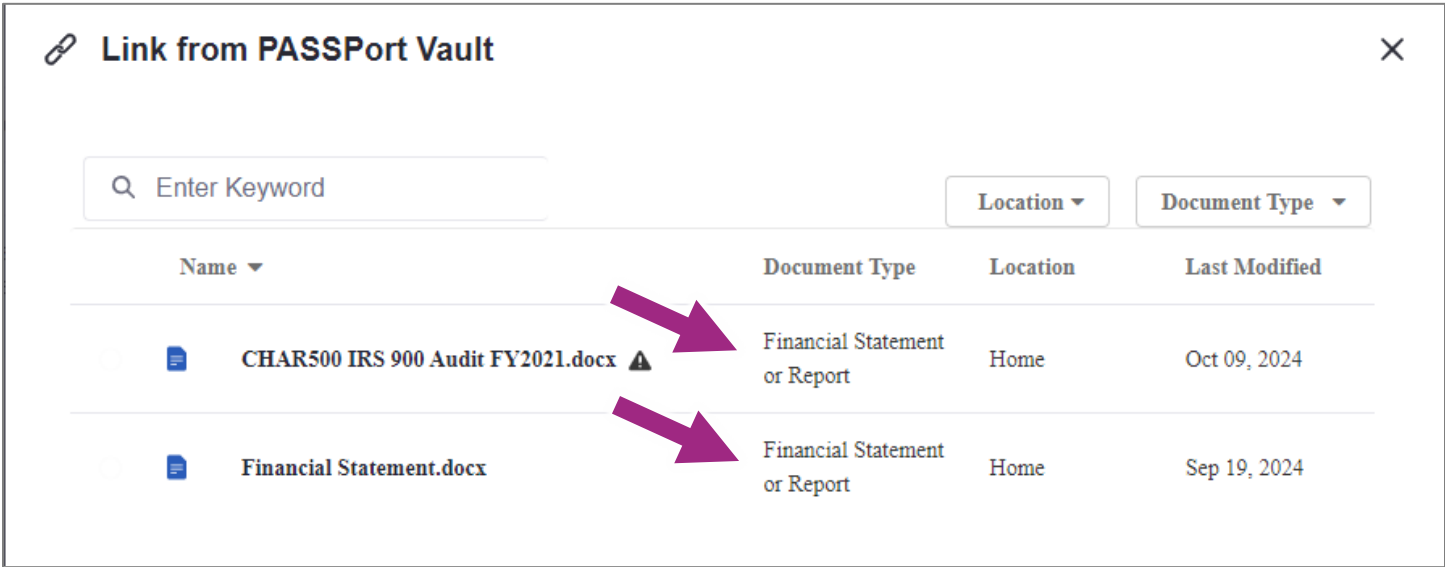
Choose this option when you have the corrected [Financial Statement or Report](#) already in your organization's PASSPort Vault. Follow the instructions below to link that file to your PQL Application.

- 1. Click the **Link File** button, then select **Link from PASSPort Vault** from the drop-down menu.



The Link From PASSPort Vault window appears.

- 2. The documents available for linking from the PASSPort Vault will be **limited by the document type**, in this case Financial Statement or Report. The image below shows there are only 2 documents in the Vault with this document type.



3. Move your mouse over the document you want to link. A radio button will appear to the left of the document's icon and Name. Click the **radio** button to select the document.

Tip: The radio button displays only when the mouse moves over **the area to the left of the file icon**. Once it becomes visible it can be clicked.

Link from PASSPort Vault

Q Enter Keyword

Location

Document Type

Name	Document Type	Location	Last Modified
CHAR500 IRS 900 Audit FY2021.docx	Financial Statement or Report	Home	Oct 09, 2024
3 ☐ Financial Statement.docx	Financial Statement or Report	Home	Sep 19, 2024

4. Click the **Select** button located to the bottom right of the same window.

Cancel

4

Select

The page refreshes and returns to the main Manage Document window.

5. Review and verify the Document Name, File (displaying file name and extension) and new Status (now Uploaded). Reconfirm that the new document addressed all concerns raised by your MOCS reviewer.

Document Type	Document Name ⓘ	File	Agency Label	Status	Upload Date	Last Modified ↓
REQUESTED						
Financial Statement or Report	Financial Statement	Financial Statement.docx	--	UPLOADED	Sep 19, 2024	Oct 10, 2024

At this point, you can [resubmit your application](#) unless other revisions to the PQL application are needed.

[Back to Top](#)

Change the Document Start and End Dates

After unlinking the document from your HHS PQL application, change the Start and End Dates (also referred to as [Validity](#)) of the document directly in the Vault.

Follow the steps below to change the dates.

1. Go to the PASSPort Vault. For guidance, see the [Access the PASSPort Vault](#) guide.
2. Find the document in your organization's Vault. Need help finding that document? See the [Search the Vault](#) guide.
3. Click the **ellipsis** (3 vertical dots) on the right to view the drop-down menu, then select **View Details**.

☒		CHAR500 IRS 900 Audit FY2023.pdf	Financial Statement or Report	Oct 10, 2024	Oct 10, 2024	3
		CHAR500 IRS 900 Audit FY2024.pdf	Financial Statement or Report	Oct 10, 2024	Oct 10, 2024	View Details
		Rename_CHAR500 IRS 900 Audit FY2024.pdf	CHAR 500 + 990 +Audit	Oct 10, 2024	Oct 10, 2024	Download
		CHAR500 IRS 900 Audit FY2021.docx	Financial Statement or Report	Oct 09, 2024	Oct 09, 2024	Send
		Financial Statement.docx	Financial Statement or Report	Sep 19, 2024	Sep 19, 2024	Preview
		Subcontractor Agreement - HBG - August 2024.pdf	Subcontractor Agreement	Aug 05, 2024	Aug 05, 2024	Rename
						Move
						Add to Favorites
						Archive

The Details panel appears on the right of the screen.

4. The Details tab displays as default. Locate the Validity and click the **pencil** icon next to it.

1 of 14 Selected [Select All](#)

Name	Document Type	Created Date	Last Modified
System-Generated Documents			
DOCUMENTS			
☒	CHAR500 IRS 900 Audit FY2023.pdf	Financial Statement or Report	Oct 10, 2024 Oct 10, 2024
	CHAR500 IRS 900 Audit FY2024.pdf	Financial Statement or Report	Oct 10, 2024 Oct 10, 2024
	Rename_CHAR500 IRS 900 Audit FY2024.pdf	CHAR 500 + 990 +Audit	Oct 10, 2024 Oct 10, 2024
	CHAR500 IRS 900 Audit FY2021.docx	Financial Statement or Report	Oct 09, 2024 Oct 09, 2024
	Financial Statement.docx	Financial Statement or Report	Sep 19, 2024 Sep 19, 2024
	Subcontractor Agreement - HBG - August	Subcontractor Agreement	Aug 05, 2024 Aug 05, 2024

CHAR500 IRS 900 Audit ...

Details Activity

HAS ACCESS
HONEY BEE GARDENS:xxxxx2932 (Owner)

LOCATION
PASSPort Vault

CREATED DATE
Oct 10, 2024 by hhs itops staff

LAST MODIFIED
Oct 10, 2024 by hhs itops staff

VALIDITY

Oct 02, 2024 - Nov 15, 2024

DESCRIPTION

Add description

The Edit Validity pop-up window opens.

5. Change the Validity dates by clicking the **Start** and **End** date fields.
6. Click the **Save** button and return to the folder in the Vault where the document is located.

The screenshot shows the 'Edit Validity' dialog box. The 'Start' field is set to '10-10-2024' and the 'End' field is set to '05-15-2025'. A calendar for October 2024 is open, showing the 10th as the selected date. The 'Save' button is highlighted with a red box and a red circle labeled '6'. A red circle labeled '5' is above the date fields.

7. Repeat step 3 to view and confirm the Validity dates have changed.
8. At this point, you can link the document back to the PQL application by following the instructions to [Link a Document Via the Vault](#) earlier in this guide.

After re-linking the document, you can [resubmit your application](#) unless other revisions to the PQL application are needed.

[Back to Top](#)

Resubmit HHS PQL Application to MOCS for Review

After revising your Financial Statement or Report, resubmit the application back to your MOCS reviewer.

Note: If your MOCS reviewer requested revisions in the Questionnaire tab of the application, address these prior to resubmitting the application.

1. In the HHS PQL Application, click the **Submit for Review** button.

The screenshot shows the 'PQA001266:HHS Accelerator Prequalification' application page. The left sidebar contains tabs for Overview, Questionnaire, Documents, and Application History. The main content area has a 'PQL Information' section with fields for 'PQL ID' (PQL000101) and 'Availability' (Open). At the top right, there are buttons for 'Save', 'Save and Close', 'Submit for Review' (highlighted with a red circle and the number 1), 'Cancel Application', and 'Close'.

2. Click the **Sign and Submit Application** button to proceed to the Electronic Signature.

Note: Only the **Vendor Admin** or **Vendor Procurement L2** roles can sign and submit the application.

The screenshot shows the same application page, but the 'Sign and Submit Application' button is now highlighted with a red circle and the number 2. The 'Return to Vendor L1 Draft' button is also visible.

3. Read the statement and click the **I Certify All of the Above** checkbox.

The screenshot shows the 'ELECTRONIC SIGNATURE' window. It contains a 'Save' button, 'Save and Close' button, and 'Close' button. Below these is a statement: 'By submission of this Prequalified List Application ("Application"), I hereby certify: 1. I am an authorized representative of the submitting entity; 2. All contents of this submission are accurate; 3. I have read and reviewed all documents and information contained within the Application, including any instructions and terms and conditions.' Below the statement is a checkbox labeled 'I certify all of the above' (highlighted with a red circle and the number 3) and a 'Cancel' button.

The window refreshes and the Sign button appears to the left of the Cancel button.

4. Click the green **Sign** button.

ELECTRONIC SIGNATURE



Save

Save and Close

Close

By submission of this Prequalified List Application ("Application"), I hereby certify:

1. I am an authorized representative of the submitting entity;
2. All contents of this submission are accurate;
3. I have read and reviewed all documents and information contained within the Application, including any instructions and terms and conditions.

☒

4

ify all of the above ⓘ

✓ Sign

Cancel

5. The HHS PQL application is now In Review with MOCS.

Note the message above the PQL Information section in the Overview tab:

This application is currently In Review. In order to make any changes, please contact the Managing Agency to return this application.

In the Vendor Status section, the Application Activity updates to **In Review**.

The screenshot displays the 'PQA001266:HHS Accelerator Prequalification' application page. The left sidebar contains navigation links: Overview, Questionnaire, Documents, and Application History. The main content area has a top bar with 'Save', 'Save and Close', and 'Close' buttons. A message states: 'This application is currently In Review. In order to make any changes, please contact the Managing Agency to return this application'. Below this is the 'PQL Information' section 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), Close Date, and Approved Vendors (0). The 'Vendor Status' section shows Application ID (PQA001266), Current Status (Approval Required), and Application Activity (In Review). Two red arrows point to the 'Save' button and the 'In Review' status.

PQL Information	
PQL ID	PQL000101
Availability	Open
PQL Label	HHS Accelerator Prequalification
Industry	Human/Client Service
Commodities	
Managing Agency	OFFICE OF CONTRACT SERVICES
☒ Citywide	Open Date: 8/26/2021
Source: PASSPort	Close Date:
Approved Vendors	0

Vendor Status	
Application ID	PQA001266
Current Status	Approval Required
Application Activity	In Review

6. You will be notified of a decision by email.

[Back to Top](#)

Appendix

Required Documents for Nonprofit Filers

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

[Back to Top](#)

Validity End Dates for Annual Filers and Other Organizations

Nonprofit Validity End Dates by Annual Filing Deadlines				Other Validity End Dates	
Filing Period Schedule		Filing Deadline + 1 Year = Validity End Date		Exempt Nonprofits	For Profits
Your Filing Period	Last Day of Filing Period	For 7A or DUAL Registrants	For EPTL Registrants		
February 1 - January 31	January 31	December 15 (same year)	January 31 (next year)	3 years from PQL application submission date.	
March 1 - February 28	February 28	January 15 (next year)	February 28 (next year)		
April 1 - March 31	March 31	February 15 (next year)	March 31 (next year)		
May 1 - April 30	April 30	March 15 (next year)	April 30 (next year)		
June 1 - May 31	May 31	April 15 (next year)	May 31 (next year)		
July 1 - June 30	June 30	May 15 (next year)	June 30 (next year)		
August 1 - July 31	July 31	June 15 (next year)	July 31 (next year)		
September 1 - August 31	August 31	July 15 (next year)	August 31 (next year)		
October 1 - September 30	September 30	August 15 (next year)	September 30 (next year)		
November 1 - October 31	October 31	September 15 (next year)	October 31 (next year)		
December 1 - November 30	November 30	October 15 (next year)	November 30 (next year)		
January 1 - December 31	December 31	November 15 (next year)	December 31 (next year)		

Filing Nonprofits: Take note whether your organization is a **7A or Dual** vs. **EPTL** registrant. Deadlines vary based on this category. The Validity **End Date** is the next year's filing deadline.

Example: Filing period = July 1, 2023 – June 30, 2024. With this filing period:

A **7A or Dual** registrant's deadline is **May 15, 2025**. The next filing year's deadline is May 15, 2026.

An **EPTL** registrant's deadline is **June 30, 2025**. The next filing year's deadline is June 30, 2026.

[Back to Top](#)

Certificate of Incorporation: List of Equivalents and other Required Documents

All necessary Certificate of Incorporation (COI) or equivalent documents must be submitted as a combined PDF.

Certificate of Incorporation (COI), Equivalents and Other Required Documents									
Type of Organization	COI + Equivalents						Documents by Scenario		
	Certificate of Incorporation or Formation	Provisional Charter	Absolute Charter	Articles of Association	Articles of Organization	County Clerk Certificate	Certificate of Amendment(s)	Application of Authority (issued by NYS)	Certificate of Assumed Name (DBA)
Corporation (Inc.) For Profit or Nonprofit	Required						Required for name change		Required w/ Doing Business As
Limited Liability Company (LLC)					Required		Required for name change		Required w/ Doing Business As
Foreign Organizations Formed Outside New York State (NYS)	Required						Required for name change	Required for all Foreign Entities	Required w/ Doing Business As
Sole Proprietorship						Required	Required for name change		Required w/ Doing Business As
Educational Institution Chartered under NYS Dept of Education (library, museum, etc.)		Either Provisional (time limited) or Absolute is Required					Required for name change		Required w/ Doing Business As
Foundations (private)				Required			Required for name change		Required w/ Doing Business As