Business Improvement District (BID) Division

Office of the City Clerk

Business Improvement District Portal Resource

The Office of the City Clerk developed a new portal for BID administrators, stakeholders, and the public. Our goal is to improve transparency, accountability, simplicity and consistency. This guide will assist you to navigate the BID Portal. If you need additional support or assistance, please contact us at (213) 978-1133 or you may email us at Clerk.NBID@lacity.org.

*Disclaimer: The data and information used in this resource are for training purposes only.
Portal Homepage

The portal homepage is designed to give you a quick overview of all the BIDS within the City of Los Angeles. Here you will be able to view BID fund balances, assessments, invoiced funds, BID term-lengths, budget expenditures, and more. You can even search for data by individual stakeholders within a BID!
Registration and Log-In

Before accessing the portal, staff from the BID Division will need to register you. If you have not been registered, please contact your BID Analyst. If you do not know who your BID Analyst is, please call 213-978-1133 or you may email us at Clerk.NBID@lacity.org for assistance.

Once you are registered, you will receive an email prompting you to complete the process.

To log-in:

1. In an internet browser type in: WWW.BIDSPORTAL.ORG
2. Click Log In
3. Enter your **E-mail Address** and **Password**
4. Click **Sign-In**

**Tip:** Having trouble signing-in, or forgot your password? Click the **Forgot your password?** button at the bottom right corner of the screen. If you are still having issues, please contact your BID Analyst.
The Functions

There are four major functions in the portal to assist your Business Improvement District needs.

1. **Home** gives you an overview of your BID and notifies you of items that need attention.
2. **Documents** is where you will **submit required documents** for the BID (i.e. - Assessment Data, Annual Planning Report, Financial Statement, Insurance Information, and more).

3. **Invoices** is where you will **submit requests for funding**.

4. **Dashboard** is where you will **view your assessment/fund information, budget allocations, and stakeholder information**.
BID Administrator Homepage

The BID Administrator Home page is designed to give you an overview of your BID. Here you will be able to view the BIDs fund balance, items that need attention, and reporting requirements and statuses.

**Action Items**

This section identifies items that need attention.

A. Notifications in **RED** identify items that place the BID **out of compliance**. You will need to take care of each item before the BID is able to invoice the City Clerk’s Office for funds.

B. Notifications in **YELLOW** identify items that need your attention. You will still be able to invoice the division for funds.

**Tip**: Click on an item to take action on it.

**BID Dropdown**

This section displays the BID name, term-length, assessment/fund information, and your reporting requirements and statuses.

Section I - BID Name & Assessment/Fund Information
Tip: Hover your mouse over the icon for a quick description of the item.

Section II - Reporting Requirements & Statuses

<table>
<thead>
<tr>
<th>Annual Planning Report:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report</td>
</tr>
<tr>
<td>Due Date:</td>
</tr>
<tr>
<td>Received:</td>
</tr>
<tr>
<td>2019 Annual Planning Report</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quarter Reports:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quarter</td>
</tr>
<tr>
<td>Due Date:</td>
</tr>
<tr>
<td>Received:</td>
</tr>
<tr>
<td>Newsletter:</td>
</tr>
<tr>
<td>2019 1st Quarterly Report</td>
</tr>
<tr>
<td>2019 4th Quarterly Report</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Required Documents:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document</td>
</tr>
<tr>
<td>Received:</td>
</tr>
<tr>
<td>Verified:</td>
</tr>
<tr>
<td>Annual Public Meeting</td>
</tr>
<tr>
<td>Annual Financial Statement</td>
</tr>
<tr>
<td>Assessment Worksheet</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Insurance:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insurance Type</td>
</tr>
<tr>
<td>Start:</td>
</tr>
<tr>
<td>End:</td>
</tr>
<tr>
<td>Amount:</td>
</tr>
<tr>
<td>Verified:</td>
</tr>
<tr>
<td>General Liability Insurance</td>
</tr>
<tr>
<td>D &amp; O Liability Insurance</td>
</tr>
<tr>
<td>Workers’ Compensation Insurance</td>
</tr>
</tbody>
</table>

Status Icon Descriptions:

- Indicate a document has not been uploaded or needs to be verified.

- Indicate a submitted document has been approved and verified.
Submitting Documents

Submitting documents is easier than ever. With the Documents function, BIDs will now submit Reports, County Data, Insurance Information, Financial Statements, and Public Meeting information to the portal.

1. Click Documents in the navigation bar

2. Using the column to the left, select the information you would like to submit

How to Submit:

- Assessments (Property-based ONLY)
- Annual Financial Statement
- Public Meeting Information
- Insurance Information
- Annual Planning Report & Quarterly Reports (Property-based)
- Annual Planning Report & Quarterly Reports (Merchant-based)
Submitting Assessments

1. Click **Documents** from the navigation bar
2. Select **Assessments** from the column to the left of your screen
3. Click on the **Annual Planning Report** drop down to select the year you will be submitting your assessments for

4. Click **Upload Assessment**, your screen will update
5. Click **Browse** and **Select** your file

![Upload Annual Assessment for Arts District LA 2019-2023]

**Tip**: You can download a blank County Assessment Data Excel template by clicking the “here” in the assessment file upload screen.

* **We strongly advise that you use the template**, it is provided to make the process easier. If you choose to use your own, keep in mind, that it is your responsibility to make any edits for the BID Portal to accept the upload.

6. **Follow** the upload process by reading the directions provided by the portal

7. **Identify** your sheets and delete any that are irrelevant

![Identify your sheets and delete any that are irrelevant]

    a. The Column on the left side shows the titles of your sheets
    b. Use the dropdowns on the right side to standardize the titles of your sheets
    c. Select the correct titles
    d. Click Set
    e. Click Delete Sheet to remove unwanted sheets
8. **Toggle** through each sheet and assign each column a header

   ![Image of a spreadsheet with columns labeled Non-Govt Parcels, Govt Parcels, Utility Parcels, Assessment, and Agency Account.](image)

   *The portal is designed to let you edit your Excel spreadsheet before you upload it. Read the directions carefully, as it provides you detailed instructions and a convenient way to edit your data on the fly (edits done through the portal **do not edit your original file**).*

9. **Review** your data and edit if needed by clicking the **Edit** icon.

10. **Click** Verify and Upload

11. If the upload is successful a pop up will appear, **Click OK**
12. Your Documents page will update reflecting the upload

<table>
<thead>
<tr>
<th>BID</th>
<th>Due Date</th>
<th>Uploaded</th>
<th>Flagged</th>
<th>Verified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts District LA 2019-2023</td>
<td>10/31/19</td>
<td>Uploaded on 11/4/19</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

13. Your Analyst will review the uploaded document and either Verify it or Flag it for corrections

Tip: If your item has been flagged, Click the View Notes icon to see why.
Submitting Annual Financial Statement

1. Click **Documents** from the navigation bar
2. Select **Annual Financial Statement** from the column to the left of your screen
3. Click on the **Annual Planning Report** drop down to select the year you will be submitting your statement for

![BIDs Portal image]

4. Click **Upload Financial Statement**, your screen will update

![BIDs Portal image]

5. Click **Browse** and **Select** your file

![Submit Financial Document]

6. Click **Submit**
7. If the upload is successful a pop up will appear, Click **OK**

8. Your **Documents** page will update reflecting the upload

9. Your Analyst will review the uploaded document and either **Verify** it 🔄 or **Flag** it 🚨 for corrections

**Tip**: If your item has been flagged, Click the **View Notes** 🔬 icon to see why.
Submitting Public Meeting Information

1. Click **Documents** from the navigation bar
2. Select **Public Meeting** from the column to the left of your screen

![Image](image1.png)

3. Click **Upload Public Meeting Documentation**, your screen will update

![Image](image2.png)

4. Insert **Meeting Date**

![Image](image3.png)

5. Click **Browse** and **Select** your file
6. Click **Submit**
7. If the upload is successful a pop up will appear, Click OK

8. Your Documents page will update reflecting the upload

9. Your Analyst will review the uploaded document and either Verify it ✅ or Flag it ⚠️ for corrections

Tip: If your item has been flagged, Click the View Notes icon to see why.
Submitting Insurance Information

1. Click **Documents** from the navigation bar
2. Select **Insurance** from the column to the left of your screen

3. Click **Edit Insurance**, your screen will update

4. Enter **Insurance Information**
Tip: The * icon indicates a required field.

Tip: If your BID has a waiver for Workers’ Compensation Insurance, enter the Start and End date of the waiver, and upload the waiver in place of the Certificate of Liability Insurance.

5. Click Browse and Upload your Certificate of Liability Insurance
6. Click Submit

7. If the upload is successful a pop up will appear, Click OK
8. Your Documents page will update reflecting insurance expiration dates and verification status

<table>
<thead>
<tr>
<th>BID</th>
<th>Type</th>
<th>Expires</th>
<th>Verified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts District LA 2019-2023</td>
<td>General Liability Insurance</td>
<td>5/12/23</td>
<td></td>
</tr>
<tr>
<td></td>
<td>D&amp;B Liability Insurance</td>
<td>4/1/20</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Workers' Comp. Insurance</td>
<td>5/12/19</td>
<td></td>
</tr>
</tbody>
</table>

9. Your Analyst will review the uploaded information to Verify it

**Tip:** If your item has not been verified, Click the View Insurance Details icon to see what items needs your attention
Submitting Annual Planning and Quarterly Reports (Merchant-Based)

Submitting an Annual Report

1. Click Documents from the navigation bar
2. Select APR from the column to the left of your screen
3. Click on the Annual Planning Report drop down to select the year you will be submitting your report for
4. Click Upload APR Document, your screen will update
5. Click Browse and Select your file
6. Click **Submit**

![Submit APR Report: Chatsworth 2020](image)

7. If the upload is successful a pop up will appear, Click **OK**

![Success](image)

8. Your **Documents** page will update reflecting the upload

![Document update](image)

9. Your Analyst will review the uploaded document and either **Verify it** or **Flag it** for corrections

**Tip:** Click the **View Document** icon to view your uploaded document.
Submitting a Quarterly Report and Newsletter

1. Click Documents from the navigation bar
2. Select Quarter Reports from the column to the left of your screen
3. Click on the Quarterly Report drop down to select the quarter you will be submitting your report for

4. Click Upload Quarter Report, your screen will update

5. Click Browse and Select your file

6. Click Submit
7. If the upload is successful a pop up will appear, Click OK

8. Upload your Newsletter, Select the **Newsletter Upload** icon and refer back to Step Five (5).

9. Your **Documents** page will update reflecting the uploads

10. Your Analyst will review the uploaded document and either **Verify** it ✅ or **Flag** it 🚫 for corrections

**Tip:** Click the **View Document** 📝 icon to view your uploaded document.
Submitting Annual Planning and Quarterly Reports (Property-Based)

1. Click **Documents** from the navigation bar
2. Select **Property APR** from the column to the left of your screen

(SAME AS CURRENT PROCEDURE)
Invoices

The **Invoices** function is designed to give you an overview of your funding. You will be able to see when your funds have been deposited or withdrawn, invoice history, and current fund balance.

1. Click **Invoices** in the navigation bar

![BIDs Portal](image)

2. **Invoices** Dashboard Description

1. **Action Items:**
   A. Notifications in **RED** identify items that place the BID **out of compliance**. You will need to take care of each item before the BID is able to invoice the City Clerk’s Office for funds.
   B. Notifications in **YELLOW** identify items that need your attention. You will still be able to invoice the division for funds.

**Tip:** Click on an item to take action on it.
II. Pending Invoices: Number of invoices being processed
III. Pending Total: Total funds being processed for transfer
IV. Available Balance: Funds available for invoicing
V. View: Opens a detailed breakdown of funding and invoice history

3. Click View

4. Funding & Invoice History Page Description
I. **Funding & Invoice Tabs:** Use to toggle between Funding Summary & Invoice Summary

II. **Balance:** Funds available for invoicing

III. **PDF. Icon:** Click to view supporting documents or the invoice used to request the funds

IV. **Back to Accounts:** Takes you back to the **Invoices** dashboard

V. **+ New Invoice:** Create/Submit an invoice for funds

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5. Click **+ New Invoice** to create a new invoice

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*If your BID is out of compliance*, you will not be able to create an invoice. A text box will appear notifying you why. You will need to take action on the item(s) before you will be able to invoice the department for funds.
*SKIP TO STEP 15 FOR MERCHANT-BASED BID INVOICING*

6. Review the Invoice

*The requested balance is broken down into the categories identified in your MDP/Annual Report. You can adjust these balances at your discretion to reflect the BIDs spending.*
7. Select **Electronic Fund Transfer (ETF)** or Enter **Updated Remittance Address**

8. Click **Submit**
9. Review and Click **Sign Request**

New Invoice

Arts District Los Angeles Company
427 S. Central Ave
Los Angeles CA 90012
https://artdistrictla.org/

Monday, November 19, 2019

Holly L. Wincomb, Chief
Administrative Services Division
Office of the City Clerk
Room 214, City Hall
260 North Spring Street
Los Angeles CA 90012

RT Monthly Disbursement Request [division]

As outlined in the agreement between the City of Los Angeles and the Arts District LA 2014-2015, we are requesting payment of the assessment funds in the amount of $12,500.00 for November 19, 2019.

<table>
<thead>
<tr>
<th>Accountable Funds</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>County Remittance - 11/18/19</td>
<td>$12,500.00</td>
</tr>
<tr>
<td><strong>Grand Total:</strong></td>
<td><strong>$12,500.00</strong></td>
</tr>
</tbody>
</table>

I certify that payment requested will be expended in accordance with the provisions of the contract agreement, and as outlined in the District's Management Plan.

Expenditure Categories Include:

<table>
<thead>
<tr>
<th>Services</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clean &amp; Safe</td>
<td>$12,500.00</td>
</tr>
<tr>
<td>Management/Administration/City/Fees/Other Assets</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>Fix</td>
<td>$500.00</td>
</tr>
<tr>
<td><strong>Grand Total:</strong></td>
<td><strong>$12,500.00</strong></td>
</tr>
</tbody>
</table>

I certify that I represent the SDI (SDI) and I am authorized to make this request on behalf of the organization.

John Doe
Test Title

We are requesting an electronic transfer of the funds. The City has our account information.

Accounts Payable
Special Assessments Section
Administrative Services Division
Office of the City Clerk
Room 214, City Hall
260 North Spring Street
Los Angeles CA 90012

[Sign Request]
10. Sign and Click **Finalize Signature** and **Sign Request**

**New Invoice**

**Arts District Los Angeles Company**
627 S. Central Ave
Los Angeles CA 90021
https://artsdistrictla.org/

Monday, November 18, 2019
Holly L. Wolcott, Chief
Administrative Services Division
Office of the City Clerk
Room 224, City Hall
200 North Spring Street
Los Angeles, CA 90012

RE: Monthly Disbursement Request Invoice

As outlined in the agreement between the City of Los Angeles and the Arts District LA 2019-2023, we are requesting payment of the assessment funds in the amount of $12,500.00 for November 18, 2019.

<table>
<thead>
<tr>
<th>Available Funds</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>County Remittance - 11/18/19</td>
<td>$12,500.00</td>
</tr>
</tbody>
</table>

**Grand Total:** $12,500.00

I certify that payment requested will be expended in accordance with the provisions of the contract agreement, and as outlined in the District’s Management Plan. Expenditure Categories include:

<table>
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<tr>
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<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clean &amp; Safe</td>
<td>$10,000.00</td>
</tr>
<tr>
<td>Management/Administrative/City Fees/Debt Asmts</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>Fx</td>
<td>$500.00</td>
</tr>
</tbody>
</table>

**Grand Total:** $12,500.00

I certify that I represent the 501(c)(3) and I am authorized to make this request on behalf of the organization.

John Doe
Test Title

We are requesting an electronic transfer of the funds.

[Set Signature]

[Sign]
[Upload]
[Type]

[Clear Signature]
[Finalize Signature]

If viewing the website on a mobile device, by putting the device in landscape mode if the input does not fit the screen.

[Sign Request]

[Return to Form]
11. Click Submit

New Invoice

Arts District Los Angeles Company
647 S. Central Ave
Los Angeles CA, 90021
https://artsdistrictla.org/

Monday, November 18, 2019
Holly L. Wolcott, Chief
Administrative Services Division
Office of the City Clerk
Room 224, City Hall
200 North Spring Street
Los Angeles CA 90012

RE: Monthly Disbursement Request Invoice

As outlined in the agreement between the City of Los Angeles and the Arts District LA 2019-2022, we are requesting payment of the assessment funds in the amount of $12,500.00 for November 18, 2019.

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</tr>
<tr>
<td>Fix</td>
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</tr>
<tr>
<td>Grand Total:</td>
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</tr>
</tbody>
</table>

I certify that I represent the 501(c)(3) and I am authorized to make this request on behalf of the organization.

John Doe
Text Title:

We are requesting an electronic transfer of the funds. The City has our account information.

Accounts Payable
Special Assessments Section
Administrative Services Division
Office of the City Clerk
Room 224, City Hall
200 North Spring Street
Los Angeles, CA 90012
12. Click OK

![Success message]

13. Your Invoice has been routed for Review and Approval

14. The Invoices Dashboard will update and reflect your pending Invoice

<table>
<thead>
<tr>
<th>Accounts</th>
<th>Pending Invoices</th>
<th>Pending Total</th>
<th>Available Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts District LA 2019-2023</td>
<td>3</td>
<td>$25,651.50</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**MERCHAND-BASED BID INVOICING**

15. Select the Quarter Start and End Dates you will be invoicing for

![Invoice input fields]
16. Select **Electronic Fund Transfer** or Enter **Payment Remittance Address Information**
17. Review and Click **Submit**

18. Review and Click **Sign Request**
19. Sign and Click **Finalize Signature**

20. Click **Submit**
21. Click **OK**

22. Your Invoice has been routed for **Review** and **Approval**

23. The **Invoices** Dashboard will update and reflect your pending Invoice
Dashboard

The **Dashboard** function gives you an overview of your BID. The overview includes assessment and fund information, invoice history, a budget breakdown, and a list of stakeholder information.

1. Click **Dashboard** in the navigation bar
I. BID Name / Term Length / Assessment & Fund Information

**Tip**: Hover your mouse over the 🤔 icon for a quick description of the item.

II. Budget Categories & Expenditures YTD

III. Stakeholder Information

**Tip**: You can use the search box at the top of a column to find specific information, or, Click on a category and sort the information alphabetically.