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!
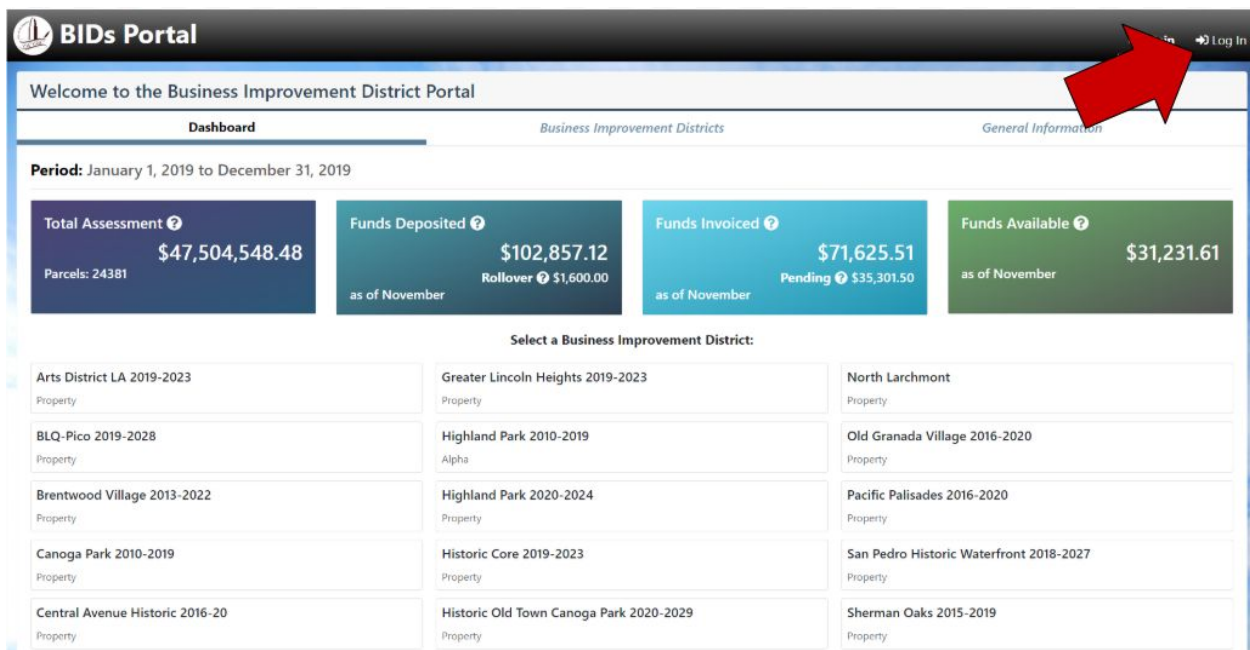
Registration and Log-In

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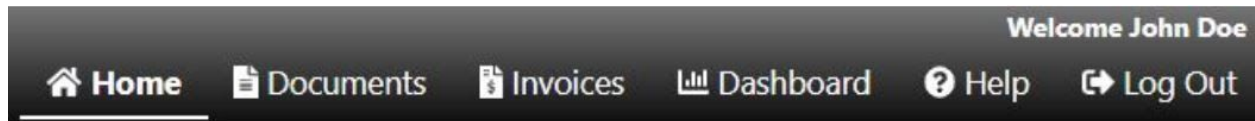
1. **Home** gives you an **overview of your BID** and notifies you of items that need attention.
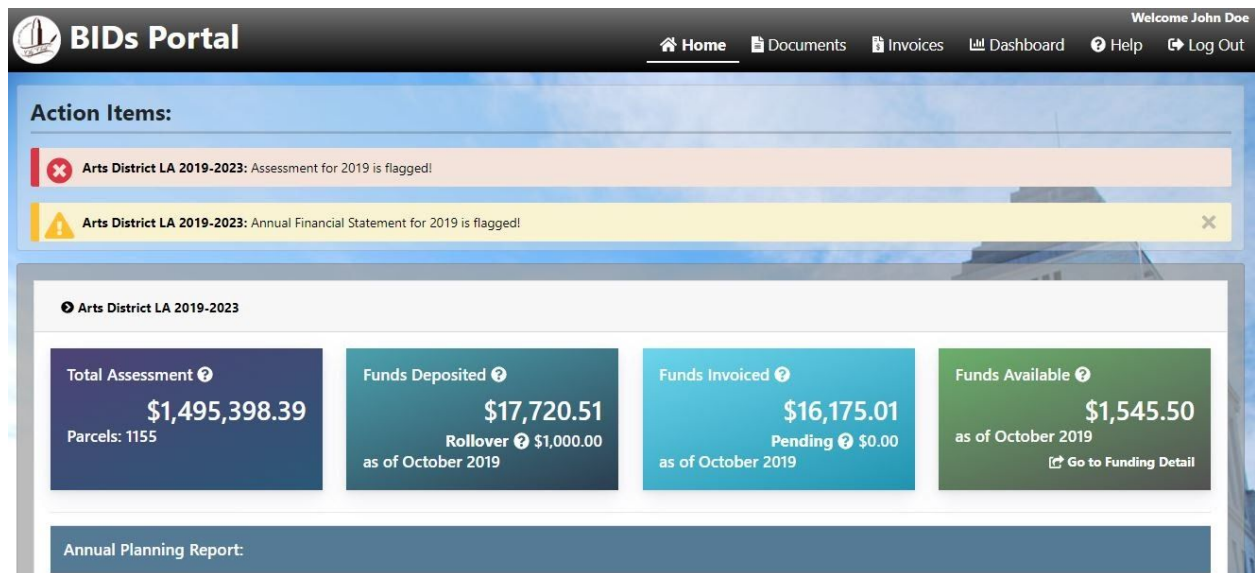
2. **Documents** is where you will **submit required documents** for the BID (i.e. - Assessment Data, Annual Planning Report, Financial Statement, Insurance Information, and more).

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.

BIDs Portal

❯ Arts District LA 2019-2023
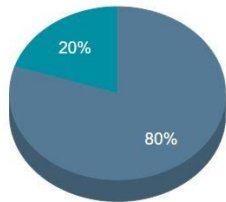
Total Assessment ❓	Funds Deposited ❓	Funds Invoiced ❓	Funds Available ❓
$1,495,398.39	**$32,021.51**	**$19,020.51**	**$13,001.00**
Parcels: 1155	Rollover ❓ $1,000.00	Pending ❓ $0.00	as of November
	as of November	as of November	➦ Go to Funding Detail

Estimated Expenditures by Service

● Clean & Safe
● Management/Administration/City Fees/Delq Assmts

20%

80%

⇕ APN	⇕ Prop. Owner	⇕ Site Address	⇕ City	⇕ Zip Code	⇕ Assessment
					≥ Min Max ≤
5163026007	1240 Palmetto LLC	448 S Alameda St	Los Angeles	90013	$559.24
5164001007	1245 Factory Place LLC	1245 Factory Pl #100	Los Angeles		$4,263.51
5164008031	1300 Factory Place LLC	1300 Factory Pl	Los Angeles		$4,902.61
5164009036	1300 Factory Place LLC	No site address	Los Angeles		$520.45
5164009037	1300 Factory Place LLC	1282 Factory Pl	Los Angeles		$1,066.01
5164009040	1300 Factory Place LLC	1246 Factory Pl	Los Angeles		$1,040.90
5164008032	1308 Factory Place LLC	1308 Factory Pl	Los Angeles		$13,617.56
5163006088	1334 Partners LP	940 E 2nd St #38	Los Angeles		$271.26
5164008006	1337 E 6th Street LLC	1337 E 6th St	Los Angeles		$798.02
5164008011	1337 E 6th Street LLC	No site address	Los Angeles		$816.14

◄ ◄ **1** 2 3 4 5 ► ►

Rows per page: 10 ▼

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

Annual Planning Report:			
Report:	**Due Date:**	**Received:**	
2019 Annual Planning Report	Not set	Not submitted	

Quarter Reports:			
Quarter	**Due Date:**	**Received:**	**Newsletter:**
2019 1st Quarterly Report	1/1/01	4/18/19	✅
2019 4th Quarterly Report	1/1/01	10/9/19	✅

Required Documents:		
Document	**Received:**	**Verified:**
Annual Public Meeting	10/22/19	❌
Annual Financial Statement	10/22/19	❌
Assessment Worksheet	10/23/19	❌

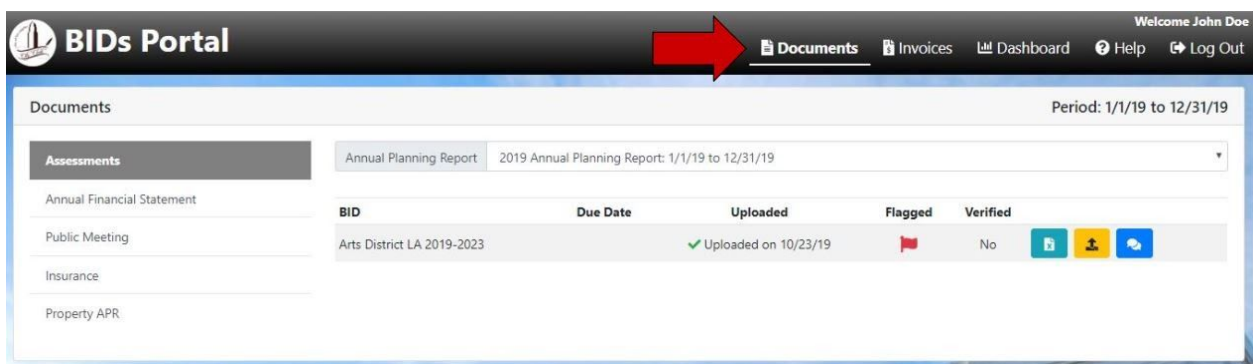| Insurance:				
Insurance Type:	**Start:**	**End:**	**Amount:**	**Verified:**
General Liability Insurance	1/4/19	1/3/20	$1,234.00	✅
D & O Liability Insurance	7/3/19	10/31/19	$123.00	✅
Workers' Compensation Insurance	7/3/19	9/3/20	$50,000.00	✅

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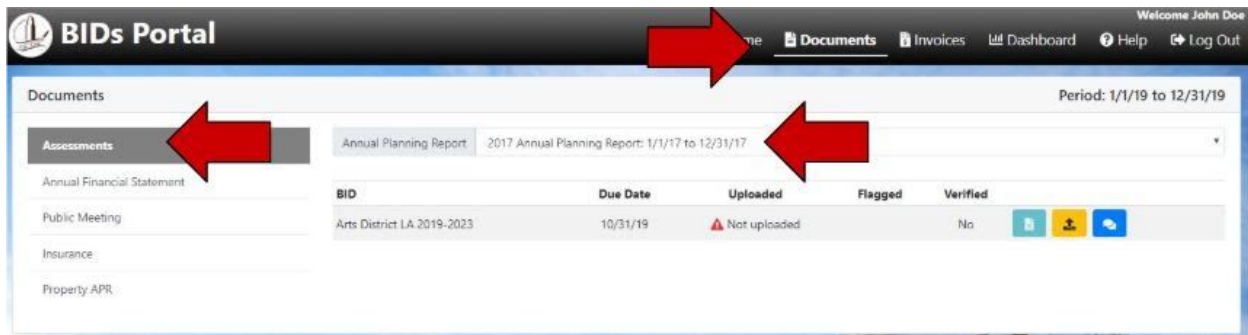
4. Click **Upload Assessment**, your screen will update
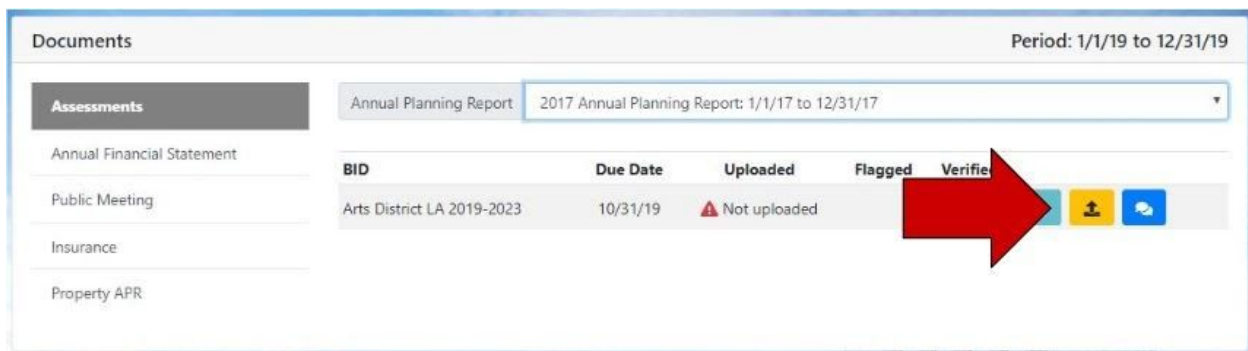
5. Click **Browse** and **Select** your file

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
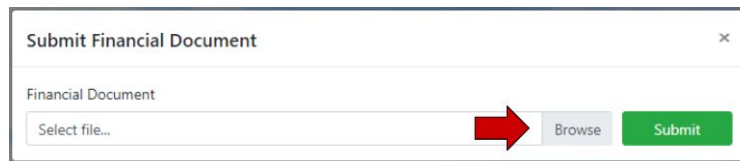

a. The Column on the left side shows the titles of your sheets
b. Use the dropdowns on the right side to standardize the titles of your sheets
c. Select the correct titles
d. Click Set
e. Click Delete Sheet to remove unwanted sheets

8. Toggle through each sheet and assign each column a header

* 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

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.
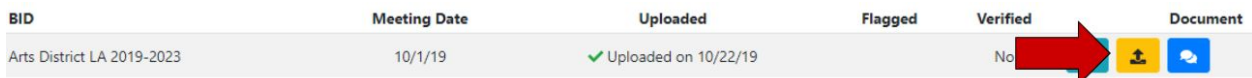
Submitting Annual Financial Statement

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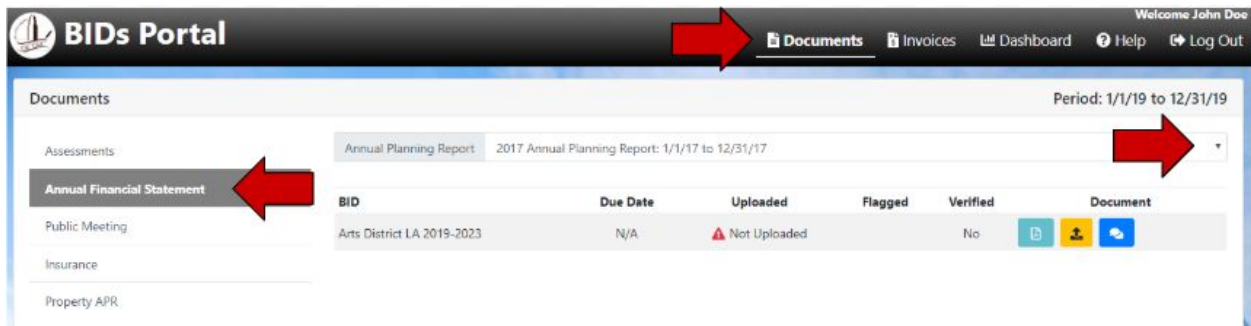
4. Click **Upload Financial Statement**, your screen will update

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

6. Click **Submit**

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

**8.** 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
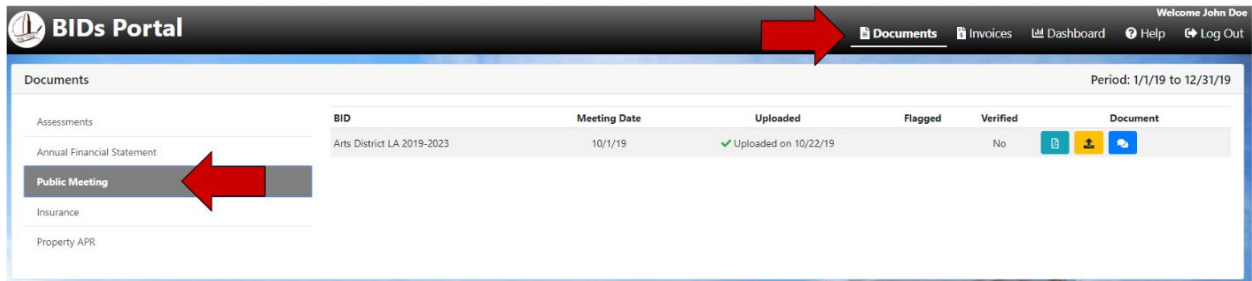
3. Click **Upload Public Meeting Documentation**, your screen will update

4. Insert **Meeting Date**

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
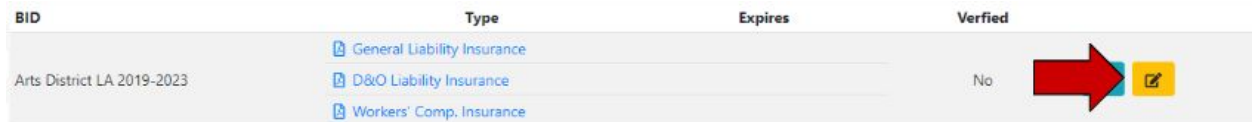
Tip: If your item has been flagged, Click the **View Notes** 💬 icon to see why.

Submitting Insurance Information

1. Click **Documents** from the navigation bar
2. Select **Insurance** from the column to the left of your screen
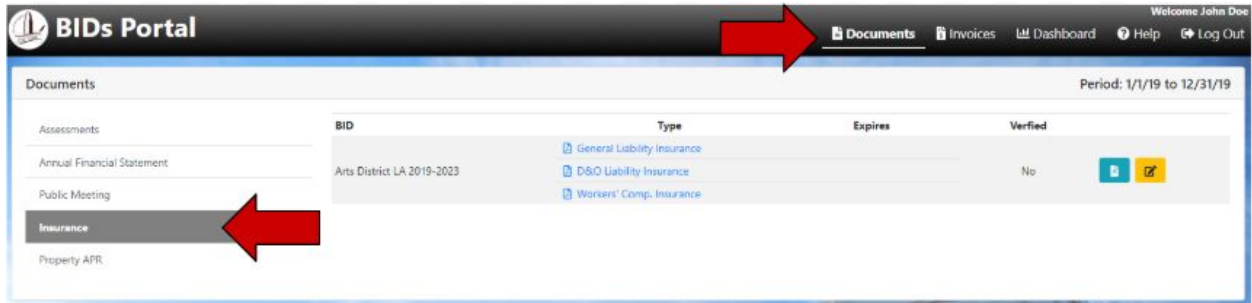
3. Click **Edit Insurance**, your screen will update

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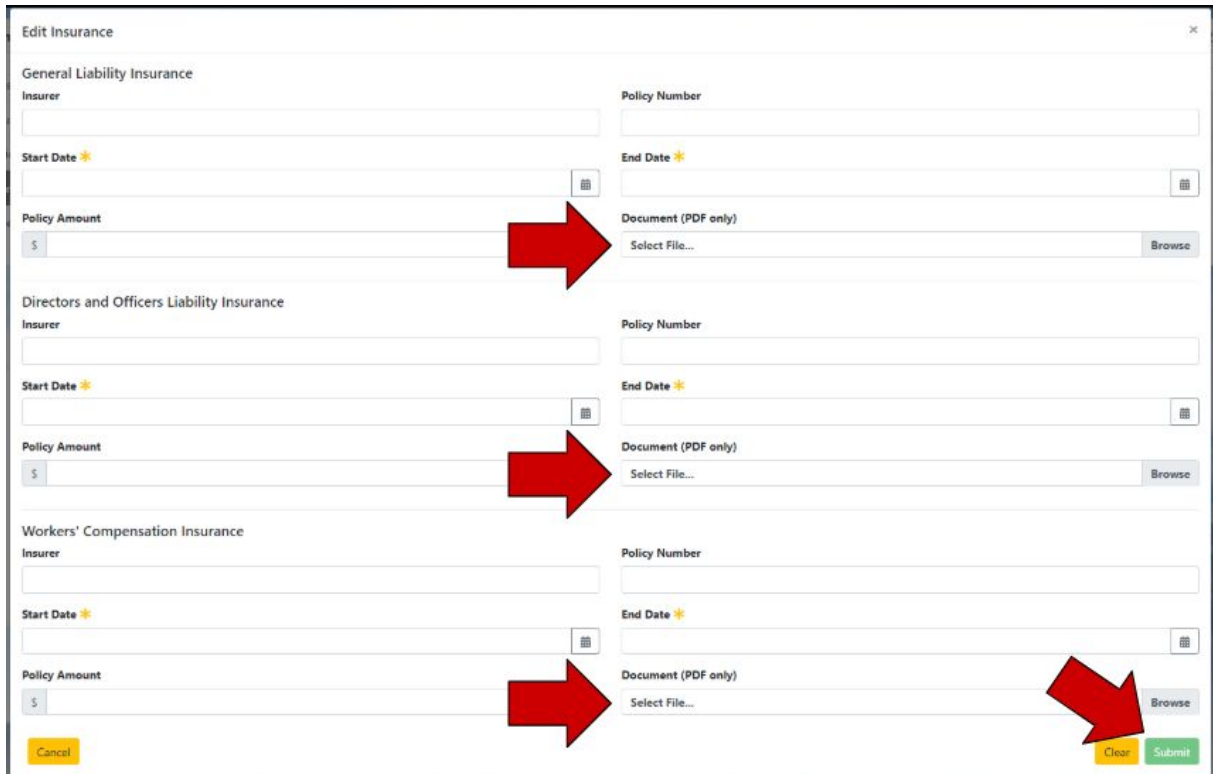
Tip: The ✳ icon indicates a required field.

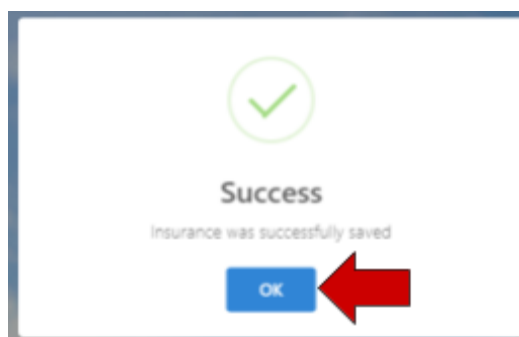**Tip**: **If your BID has a waiver for Workers' Compensation Insurance**. Enter the Start and End date of the waiver, and upload the waiver in place of the Certificate of Liability Insurance.

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

9. Your Analyst will review the uploaded information to **Verify** ✔ Yes it
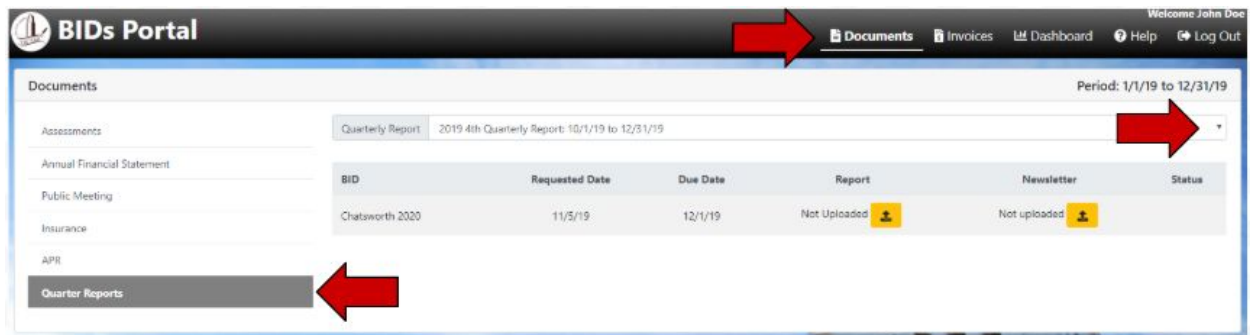
Tip: If your item has not been verified, Click the **View Insurance Details** 📄 icon to see what items needs your attention

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 ×

Annual Planning Report

Select file...

PDF files only.

Submit

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

✓

Success

Document was successfully submitted.

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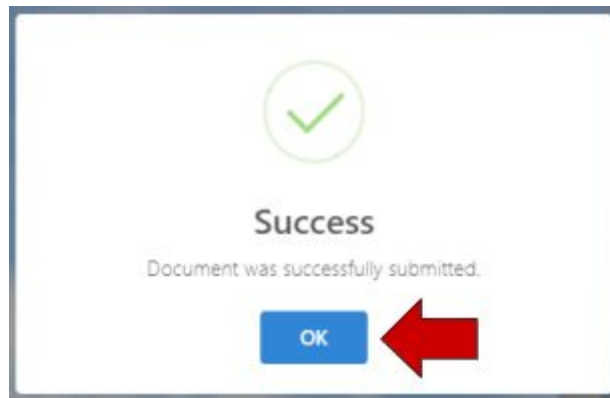
8. Your **Documents** page will update reflecting the upload

BID	Requested Date	Due Date	Uploaded	Status
Chatsworth 2020	11/5/19	9/1/20	11/5/19	

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**
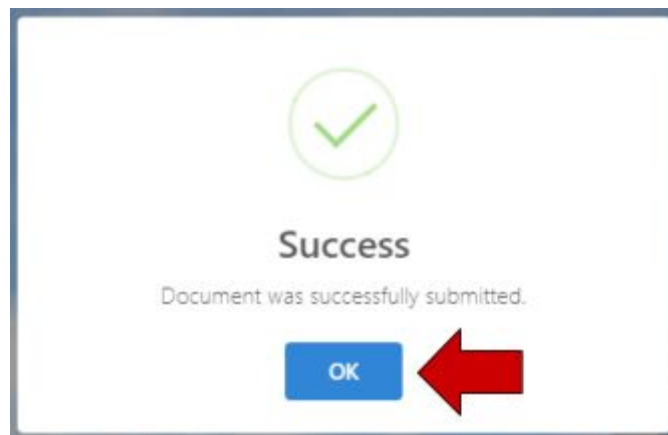
8. Upload your Newsletter, Select the **Newsletter Upload** icon and refer back to Step Five (5).
9. Your **Documents** page will update reflecting the uploads

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

Tip: Click the **View Document** [icon] 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
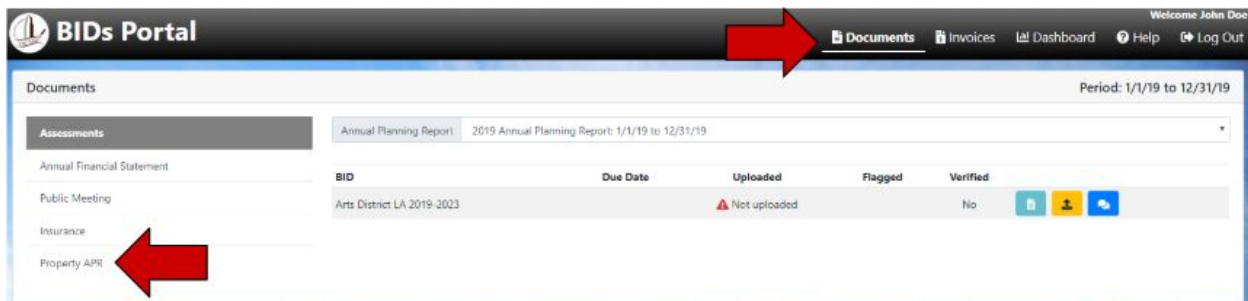
(SAME AS CURRENT PROCEDURE)

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
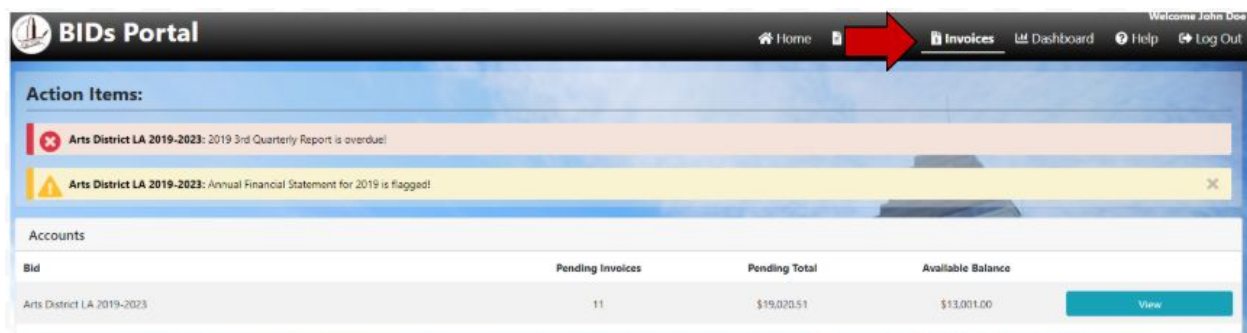
2.   **Invoices** Dashboard Description
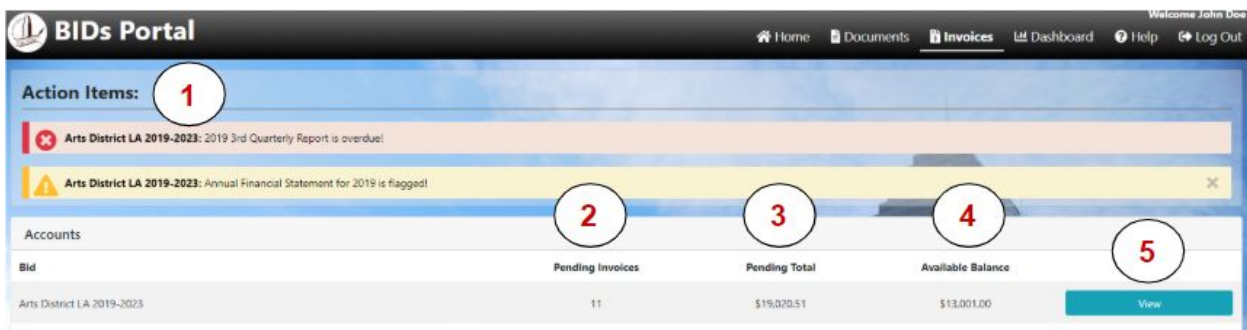
I.   **Action Items:**

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

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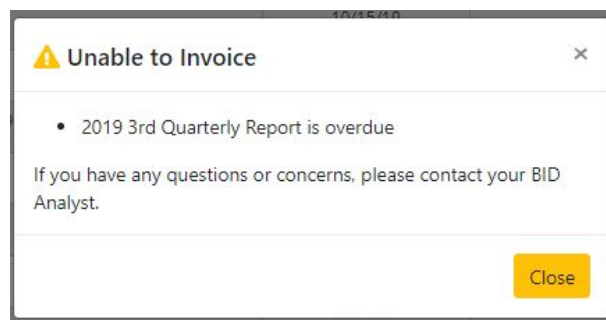

*If your BID is out of compliance, you will not be able to create an invoice. A text box will appear notifying you why. You will need to take action on the item(s) before you will be able to invoice the department for funds.

*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
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

Available Funds	Amount
County Remittance - 11/18/19	$12,500.00
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:

Services	Amount
Clean & Safe	$10,000.00
Management/Administration/City Fees/Delq Assmts	$2,000.00
Fix	$500.00
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. 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

Return to form   Sign Request

10. Sign and Click **Finalize Signature** and **Sign Request**
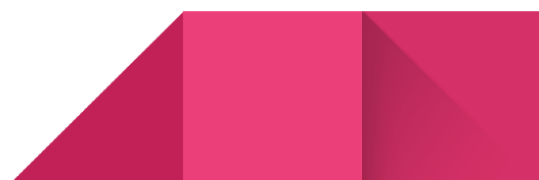
11. Click **Submit**

New Invoice   ×

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

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Expenditure Categories include:

Services	Amount
Clean & Safe	$10,000.00
Management/Administration/City Fees/Delq Assmts	$2,000.00
Fix	$500.00
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.

[signature]

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 224, City Hall
200 North Spring Street
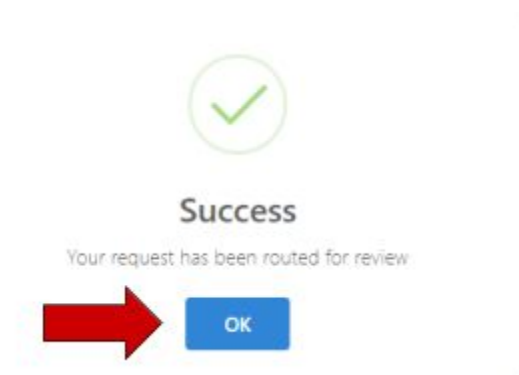Los Angeles, CA. 90012

Return to form   Re-sign   Submit

12. Click **OK**

Success
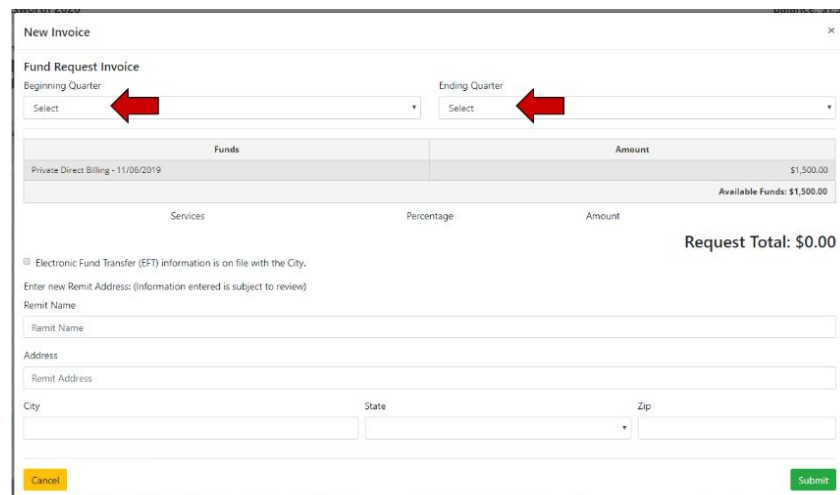
Your request has been routed for review

OK

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

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

Accounts				
Bid	**Pending Invoices**	**Pending Total**	**Available Balance**	
Arts District LA 2019-2023	3	$25,651.50	$0.00	View

MERCHANT-BASED BID INVOICING

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

New Invoice		×
Fund Request Invoice		
Beginning Quarter	Ending Quarter	
Select ▾	Select ▾	

Funds	Amount
Private Direct Billing - 11/06/2019	$1,500.00
	Available Funds: $1,500.00

Services	Percentage	Amount
		Request Total: $0.00

☐ Electronic Fund Transfer (EFT) information is on file with the City.

Enter new Remit Address: (Information entered is subject to review)

Remit Name

Remit Name

Address

Remit Address

City	State	Zip
	▾	

Cancel   Submit

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.