



SFS Handbook: Grantee Processing in SFS (Grantee User Manual)

Published Date: January 30, 2024

SFS Handbook: Grantee Processing in SFS

Table of Contents

Grantee Processing in SFS	1
Searching and Viewing Bid Events (Grant Opportunities)	1
Search for a Bid Event (Grant Opportunity) on the SFS Public Portal	2
Subscribing to Email Notifications	7
Subscribe to Email Notifications	7
Modifying Email Notifications	10
Modify Email Notifications	10
Maintaining Grantee Information	12
View and Update Grantee Information	12
Adding a Grant Contract Approver's Name to their Profile in SFS	18
Managing Prequalification Applications	22
Enter and Submit a Prequalification Application	22
Responding to Bid Events (Grant Opportunities)	58
Respond to Bid Event Expenditure Budget Types	58
Respond to Bid Event Performance Budget Types	78
Respond to Bid Event Capital Budget Types	98
Using the Match Worksheet for a Bid Response	117
Reviewing and Approving Grant Contracts	123
Preview a Contract Agreement	123
Update Contract Period Budget and Work Plan Information and Complete Review of a Contract during Collaboration	128
Apply an Electronic Signature to a Contract Agreement	142
Complete Performance Measures for a Progress Report and Submit a Progress Report for Agency Review	152
Update and Re-submit a Returned Progress Report	161
Entering and Maintaining Grant Claims	165
Enter a New Claim – Advance/Initial Amount	166
Enter a New Claim - Reimbursement Amount	173
Update an Existing Claim	181
Update a Returned Claim	184
Claim Inquiry	192
Grantee Reports and Queries	203
Run the Vendor Contract Summary Report	203

For questions regarding the information included in this Guide, contact the SFS Help Desk:
Phone: 518-457-7717 or 855-233-8363 (toll free) | Email: HelpDesk@sfs.ny.gov |
Using the SFS Support tile in the SFS Vendor Portal

SFS Handbook: Grantee Processing in SFS

Grantee Processing in SFS

Handbook Description:

This Handbook provides the knowledge and skills to support grant making activities in SFS.

Through the Strategic Sourcing module in SFS, Agencies post grant opportunities in the form of Bid Events. Grantees preview and bid on the grant opportunity and the Agency scores and reviews those bid responses in order to award a grant to a grantee.

The Grantee is the legal entity to which a grant is awarded and who is accountable for the use of the funds. Authenticated users of this entity have access to the SFS Vendor Portal.

The end-to-end grants management business process includes prequalification, searching for grant opportunities, bid submission, bid award, contract collaboration and execution, progress reporting, claims submission and payment processing.

Handbook Concepts:

This Grantee Handbook explores the following concepts:

- Searching and Viewing Bid Events (Grant Opportunities)
- Subscribing to Email Notifications
- Maintaining Grantee Information
- Managing Prequalification
- Responding to Bid Events
- Reviewing and Approving Grant Contracts
- Entering and Maintaining Grant Claims
- Running Grantee Reports

Using SFS Handbooks:

This Handbook includes multiple lessons and training topics. Each training topic includes a series of steps which walkthrough how to perform a specific task. There are different types of steps within a training topic: steps that are action oriented, and steps that are intended to provide additional information and context to assist you with performing a task.

- Handbook steps that include text in **bold blue font** indicate that action is required (e.g., Click the **Add** button).
- Handbook steps that include text in **bold red font** are used for illustrative data entry purposes (e.g., Enter the applicable value into the **Schedule ID** field. For example, Enter "**5243**".)
- Handbook steps that include text in **bold black font** provide additional information and clarification about an SFS page, field, process, report, navigational elements, and processing tips (e.g., The **Process Scheduler Request** page displays. This page is used to verify and/or select the process that you want to run.)

Searching and Viewing Bid Events (Grant Opportunities)

Lesson Description:

This lesson provides the knowledge and skills to search and view Bid Events. Bid Events are posted by Agencies to allow bidders to submit responses in order to apply for a funding award. Bid Events are created by Agencies to capture details about a grant opportunity. It is comprised of customizable questions, fields, and attachments specific for the need of each award.

SFS Handbook: Grantee Processing in SFS

Lesson Objectives:

In this lesson, you will learn how to:

- Search and view bid events

Search for a Bid Event (Grant Opportunity) on the SFS Public Portal

Topic Description:

This topic provides the knowledge and skills to search for and view bid events.

Topic Objectives:

In this topic, you will learn:

- How to search for and view bid events

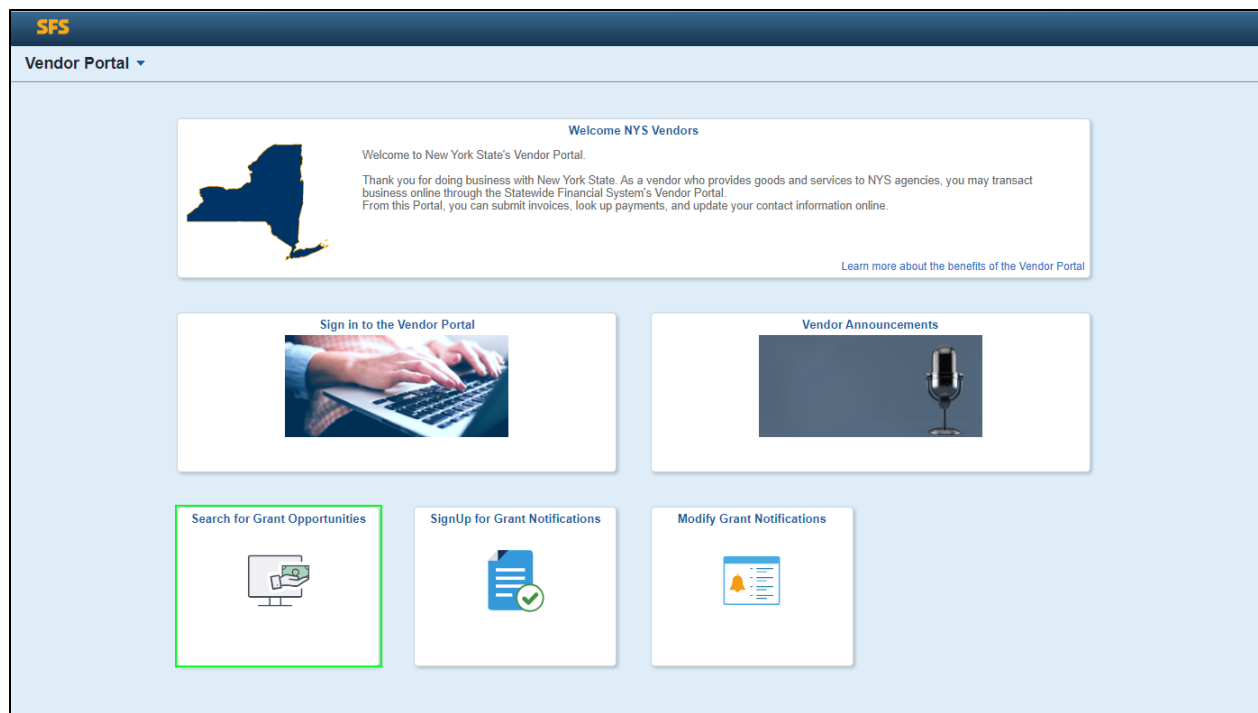
Procedure

Scenario: As a member of the public, you can search and view public bid events (grant opportunities) without signing in to the SFS Vendor Portal by visiting the [SFS Public Portal Homepage](#) and selecting the **Search for Grant Opportunities** tile.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

Step	Action
1.	Navigate to the SFS Public Portal Homepage . Note: Users <u>DO NOT</u> need to log in to SFS, as this is a public page.
2.	Note: If you experience issues within the Vendor Portal, you may need to clear your browser cache. You can press Ctrl+Shift+Del to expedite the clearing process. Also, verify the Passwords checkbox is unselected. This will allow you to keep all saved passwords and usernames after clearing your cache.

SFS Handbook: Grantee Processing in SFS



Step	Action
3.	From the SFS Public Portal Homepage, click the Search for Grant Opportunities tile.

Vendor Portal
Search for Grant Opportunities

Search for Grant Opportunities

Enter the search criteria and click the Search button

Search Criteria

Event ID

Search by Grant Opportunity

Search by Due Date

Search by Status

Search by Eligibility

Search by Funding Agency

Search by Service Area

From

To

Available

Environmental Supp

Search

Clear Criteria

Search Results

1-1 of 1

Event ID	Funding Agency	Grant Opportunity	Status	Eligibility	Availability Date	Anticipated Release Date	Due Date
EVT0000061	OMH01	2023 OMH Test	Available	Governmental Entity, Not-For-Profit	09/20/23 2:29PM	09/20/23 2:29PM	12/31/2023 2:29PM EST

SFS Handbook: Grantee Processing in SFS

Step	Action
4.	<p>The Search for Grant Opportunities page is used to search for opportunities posted by agencies.</p> <p>Enter the applicable search criteria in the Search Criteria fields.</p> <p>In this example, we will search for grant opportunities by Status and by Service Area, which are the most common search methods.</p>
5.	<p>The Search by Status options are:</p> <ul style="list-style-type: none"> • Anticipated: Only the Abstract (summary) is available to view, not the entire bid event. • Available: Bid event is open for grantees to review and submit bid responses based on Preview/Start Date. • Anticipated and Available: Includes bid events in both Anticipated and Available statuses in the search results. • Closed: Includes bid events where the end date has passed, and grantees can no longer bid on the grant opportunity.
6.	In this example, we will click the Search by Status field drop-down list and select the Available list item.
7.	When you search by Service Area , only the bid events represented by the selected service area will display in the search results.
8.	In this example, we will click the Search by Service Area field drop-down list and select the Environmental Supports list item.
9.	Click the Search button.
10.	<p>Note: A list of Event IDs will populate in the Search Results based on the current search criteria.</p> <p>Click the applicable link in the Grant Opportunity column to view the abstract details.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Grant Opportunity</div>

SFS Handbook: Grantee Processing in SFS

Search for Grant Opportunities

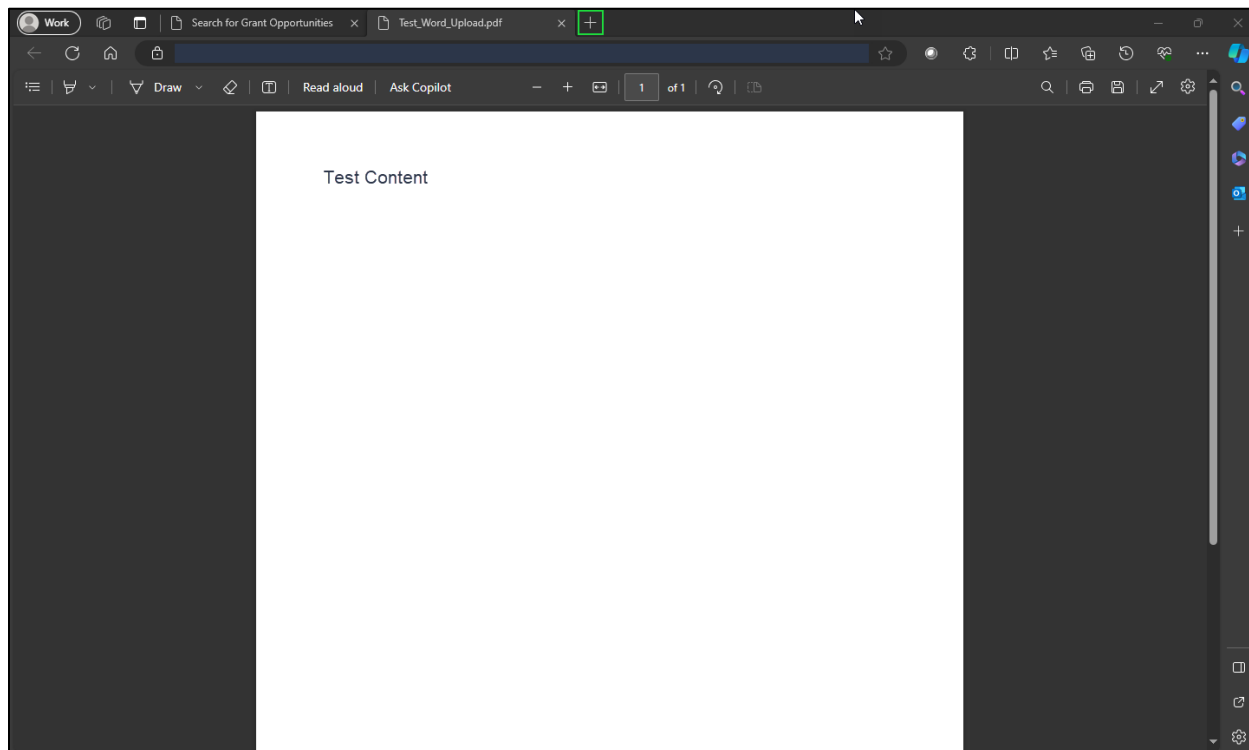
Overview

Grant Opportunity ID: EVT0000061
Agency: Office of Mental Health
Grant Opportunity: 2023 OMH Test
Contact Name: me
Contact Email: me@email.com
Solicitation Profile: 2023 OMH Test

Full Announcement Details

Announcement Link
Applications Due (Date / Time): December 31, 2023 / 02:29 PM
Bidder's Conference(s)/Application Workshop(s)
Anticipated Award Date
Anticipated Initial Contract Length: 0 Year(s)
Total Funding Available: \$10,000,000
Letter of Intent
Letter of Intent Due
Questions Due Date
Questions and Answers Narrative
Questions and Answers Posting Type: Upload
Questions and Answers Posting Date
Questions and Answers Link or Upload: [Click here](#)
Eligible Applicants: Governmental Entity, Not-For-Profit
Service Area(s): Environmental Supports, Family Supports, Government Supports

Step	Action
11.	Click the View Grant Opportunity button to view the Request for Proposal (RFP) pdf associated to the grant opportunity.

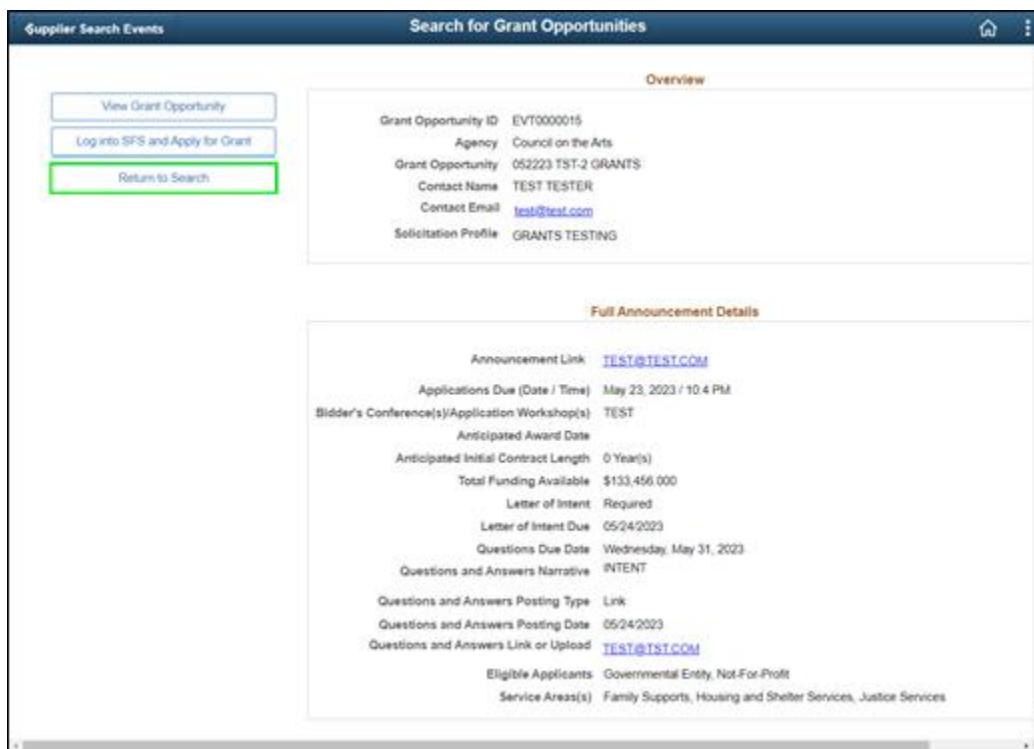


SFS Handbook: Grantee Processing in SFS

Step	Action
12.	Click the Close (X) browser tab when you are finished viewing the Request for Proposal (RFP) pdf associated to the grant opportunity.

Step	Action
13.	<p>Note: If you have access to login to the SFS Vendor Portal and are interested in applying for this grant, click the Log into SFS and Apply for Grant button to access the SFS Vendor portal.</p> <p>In this training example, we will not click the Log into SFS and Apply for Grant button.</p>
14.	<p>Note: If you do not have access to the SFS Vendor Portal and if your organization is already established within the SFS Vendor portal, an SFS Delegated Administrator has been authorized within your organization to provision user login credentials, unlock accounts, or reset passwords. Please reach out to your SFS Delegated Administrator directly.</p> <p>Also, if you do not have a login and if you are new to the SFS Vendor portal, and would like to establish an account for the purposes of doing business with the State of New York, contact the SFS Help Desk at 518-457-7717, 855-233-8363 or HelpDesk@sfs.ny.gov for more information.</p>

SFS Handbook: Grantee Processing in SFS



Step	Action
15.	Click the Return to Search button to return to the Search for Grant Opportunities page.
16.	You have successfully completed the Search For a Bid Event (Grant Opportunity) On the SFS Public Portal topic.

Subscribing to Email Notifications

Lesson Description:

This lesson provides the knowledge and skills for Grantees to subscribe to email notifications to receive information about grant opportunities for one or more service areas.

Lesson Objectives:

In this lesson, you will learn how to:

- Subscribe to email notifications.

Subscribe to Email Notifications

Topic Description:

This topic provides the knowledge and skills to subscribe to email notifications to receive information about grant opportunities for one or more service areas.

Topic Objectives:

In this topic, you will learn:

- How to subscribe to email notifications

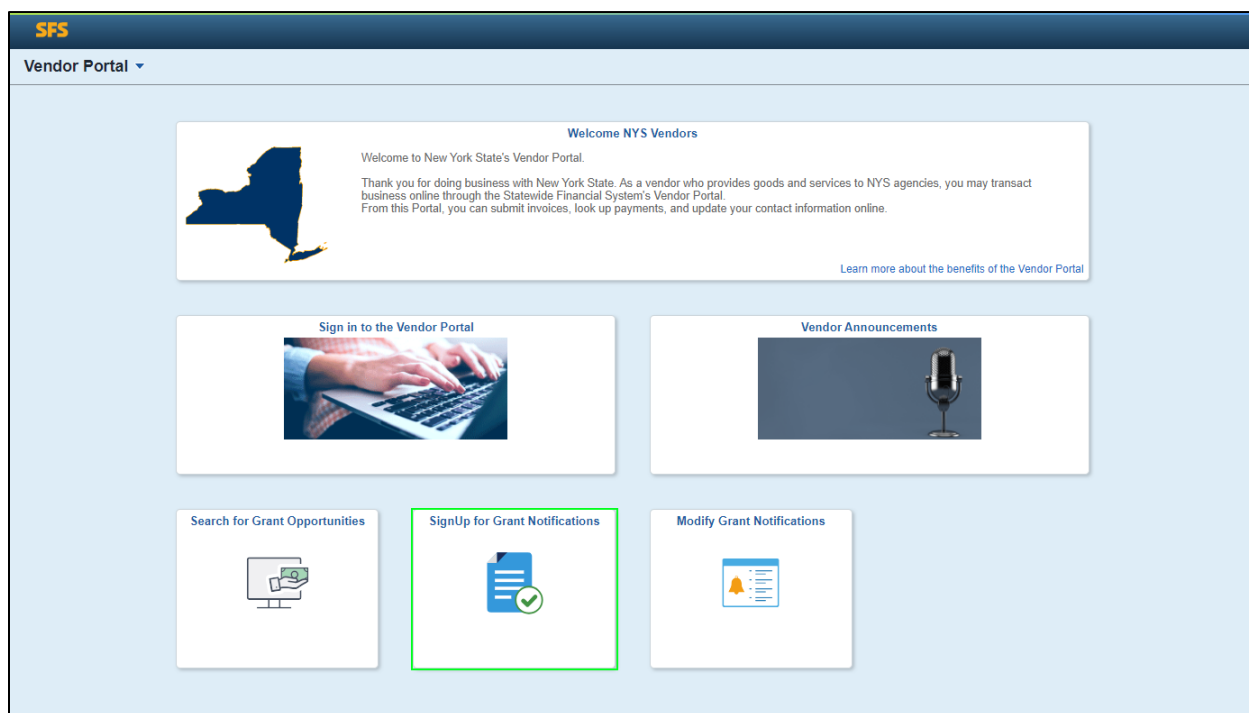
SFS Handbook: Grantee Processing in SFS

Procedure

Scenario: As a member of the public, you will subscribe to email notifications to receive information about grant opportunities without signing in to the SFS Vendor Portal.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

Step	Action
1.	Navigate to SFS Public Portal Homepage . Note: Users <u>DO NOT</u> need to log in to SFS, as this is a public page.
2.	Note: If you experience issues within the Vendor Portal, you may need to clear your browser cache. You can press Ctrl+Shift+Del to expedite the clearing process. Also, verify the Passwords checkbox is unselected. This will allow you to keep all saved passwords and usernames after clearing your cache.



Step	Action
3.	Click the SignUp for Grant Notifications tile.

SFS Handbook: Grantee Processing in SFS

Vendor Portal
Sign Up Grant Notifications

Information

Complete all required fields below.
Select the Sign-Up button below to complete the process.

*First Name

*Last Name

*Organization

*Email

*Confirm Email

Service Area Preferences

Select the checkbox next to the service area or service areas you wish to be notified about.
[Click here](#) for a description of each service area.

☐ Select/De-Select All

☐ Health and Human Services

☐ Education Supports
☐ Family Supports
☐ Health Services
☐ Housing and Shelter Services
☐ Justice Services
☐ Workforce Development

☐ Non Health and Human Services

☐ Agricultural Supports
☐ Environmental Supports
☐ Public Transportation Services
☐ Public Safety Supports
☐ Government Supports

Sign Up

Step	Action
4.	Note: Use the Information section to enter name, organization, and email address for the contact who should receive the email notifications.
5.	Enter the applicable value into the First Name field.
6.	Enter the applicable value into the Last Name field.
7.	Enter the applicable value into the Organization field.
8.	Enter the applicable value into the Email field.
9.	Enter the applicable value into the Confirm Email field.
10.	<p>Note: In the Service Area Preferences section, there are two main notification lists. These main lists are: Health and Human Services, and Non Health and Human Services.</p> <p>Click the checkbox next to the main list item to receive all notifications for that main list item.</p>
11.	Note: To view description details for each Service Area, click the Click here link.
12.	Click the applicable Service Area checkboxes.
13.	<p>Click the Sign Up button to sign up for email notifications for the selected service areas.</p> <p>Note: When the Bid Event is published, an email notification advertising it will be sent to people who signed up for notifications about the service area(s) chosen.</p>
14.	You have successfully completed the Subscribing to Email Notifications topic.

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Modifying Email Notifications

Lesson Description:

This lesson provides the knowledge and skills for Grantees to modify contact information and/or service area preferences previously selected for email notifications.

Lesson Objectives:

In this lesson, you will learn how to:

- Modify contact information and/or service area preferences previously selected for email notifications.

Modify Email Notifications

Topic Description:

This topic provides the knowledge and skills to modify contact information and/or service area preferences previously selected for email notifications.

Topic Objectives:

In this topic, you will learn:

- How to modify contact information and/or service area preferences previously selected for email notifications.

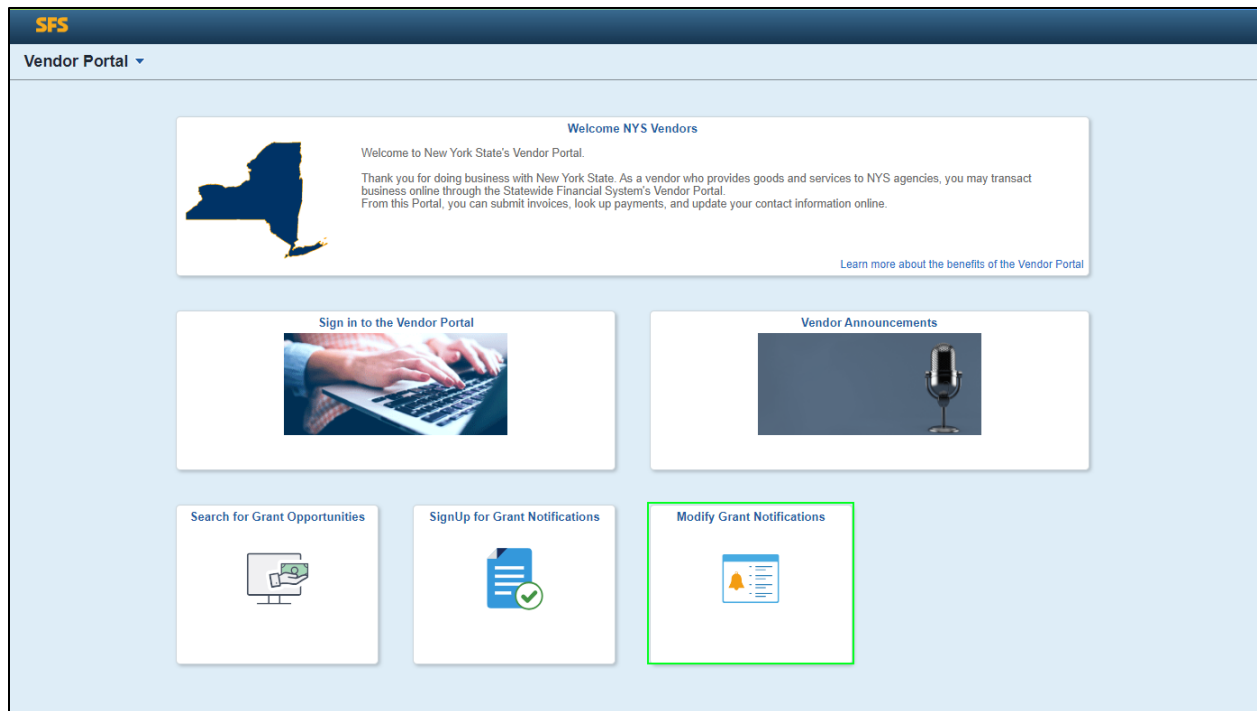
Procedure

Scenario: As a member of the public, you will modify contact information and/or service area preferences previously selected for email notifications without signing in to the SFS Vendor Portal.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

Step	Action
1.	Navigate to SFS Public Portal Homepage . Note: Users DO NOT need to log in to SFS, as this is a public page.
2.	Note: If you experience issues within the Vendor Portal, you may need to clear your browser cache. You can press Ctrl+Shift+Del to expedite the clearing process. Also, verify the Passwords checkbox is unselected. This will allow you to keep all saved passwords and usernames after clearing your cache.

SFS Handbook: Grantee Processing in SFS



Step	Action
3.	Click the Modify Grant Notifications tile to modify contact information and/or service area preferences previously selected for email notifications.

The screenshot shows the 'Modify Grant Notifications' page. At the top is a dark blue header with a back arrow, 'Vendor Portal', 'Modify Grant Notifications', and a home icon. Below the header is a white box with the title 'Search For Email'. Underneath is a text input field with the placeholder text '*Enter Email Address:'. A green border highlights the input field. Below the input field is a blue 'Search' button.

Step	Action
4.	Enter the email address that was used to sign up for notifications, into the Enter Email Address field.
5.	Click the Search button.

SFS Handbook: Grantee Processing in SFS

[< Modify Grant Notifications](#)[Sign Up Grant Notifications](#)

Information

Complete all required fields below.
Select the Sign-Up button below to complete the process.

*First Name

John

*Last Name

Doe

*Organization

NFP ORG

*Email

tst@tst.com

*Confirm Email

tst@tst.com

Service Area Preferences

Select the checkbox next to the service area or service areas you wish to be notified about.
[Click here](#) for a description of each service area.

☐ Select/De-Select All

☐ Health and Human Services

- ☐ Education Supports
- ☐ Family Supports
- ☒ Health Services
- ☐ Housing and Shelter Services
- ☒ Justice Services
- ☒ Workforce Development

☐ Non Health and Human Services

- ☐ Agricultural Supports
- ☐ Environmental Supports
- ☐ Public Transportation Services
- ☐ Public Safety Supports
- ☐ Government Supports

☐ Un-subscribe

Save

Step	Action
6.	Your previous information and selections will populate. Update your information and/or service area preferences.
7.	To un-subscribe from all prior selected service areas, click the Un-subscribe checkbox.
8.	Click the Save button to save your changes.
9.	You have successfully completed the Modifying Email Notifications topic.

Maintaining Grantee Information

Lesson Description:

This lesson provides the knowledge and skills to maintain Grantee Information.

Lesson Objectives:

In this lesson, you will learn how to:

- View and Update Grantee Information
- Adding a Grantee Contract Approver's Name to their Profile in SFS

View and Update Grantee Information

Topic Description:

SFS Handbook: Grantee Processing in SFS

This topic shows how to update a grantee's grant organizational profile information in the SFS Vendor Portal. Grantees doing business with New York State agencies access SFS by clicking the **Vendor Portal Login** from the [SFS website](#). There is a specific page in SFS where Grantees can view and make updates to their grant information.

Note: An SFS Vendor Portal account is required to access SFS.

Topic Objectives:

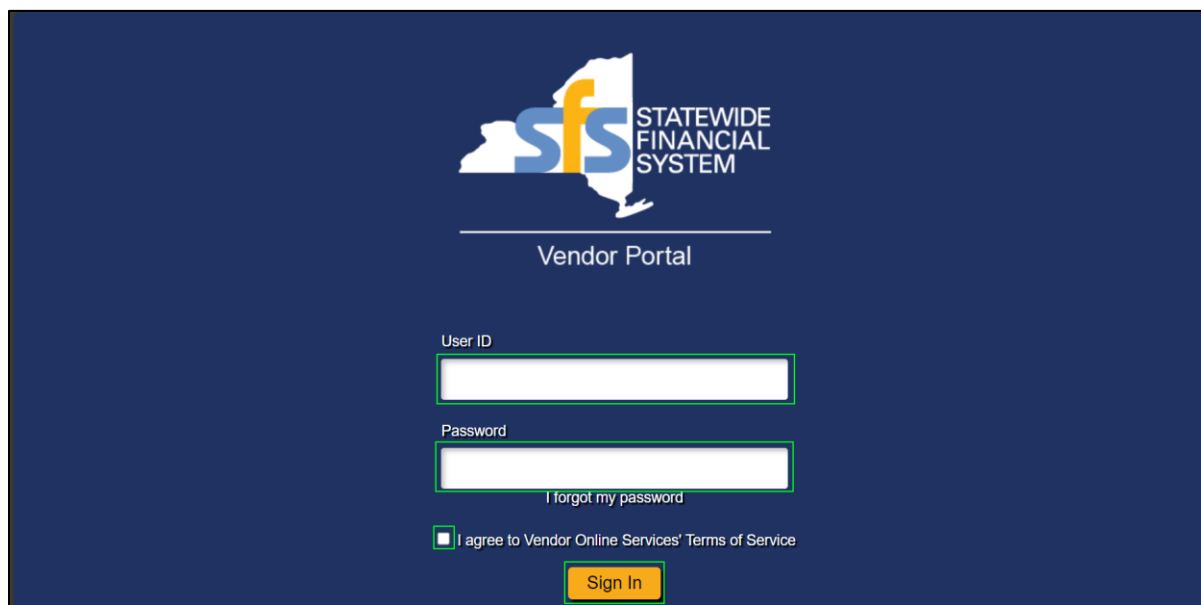
In this topic, you will learn:

- How to update a grantee's grant organizational profile information in SFS

Procedure

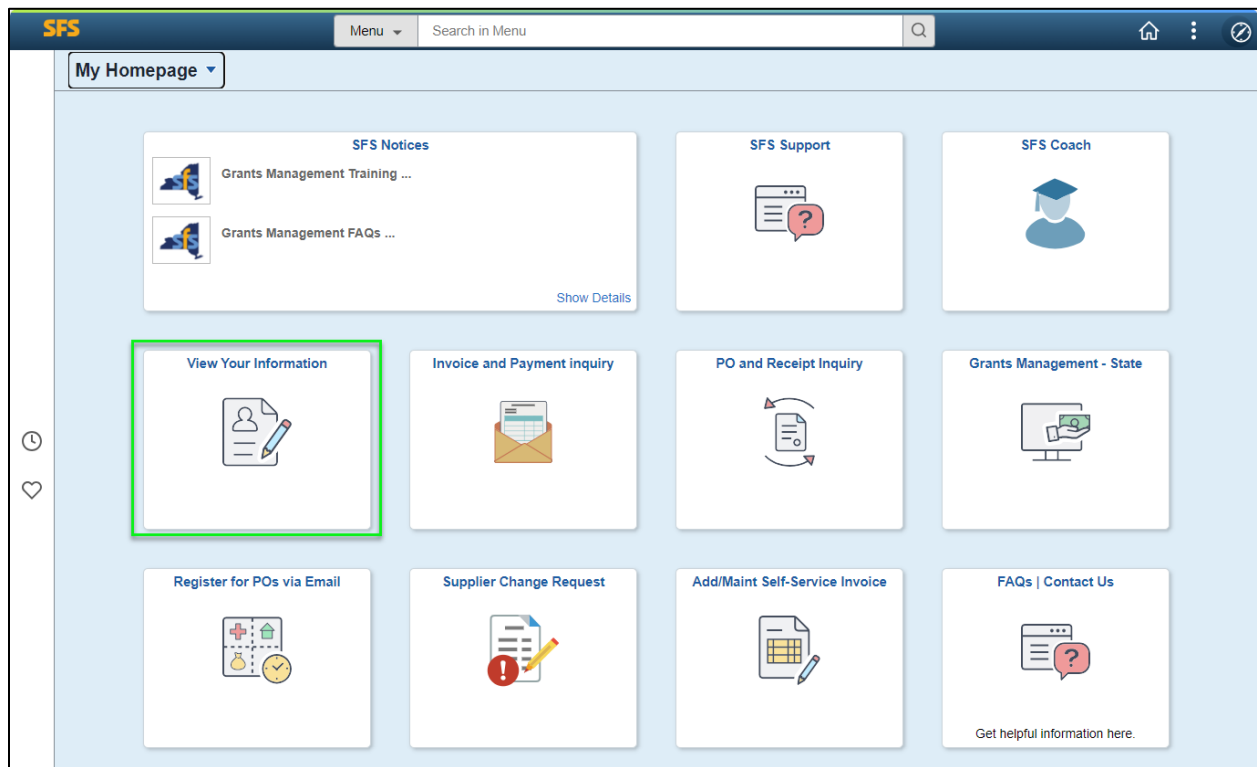
Scenario: You look up your organization's grant information in the SFS Vendor Portal and notice that some information needs to be updated. You will log in to the SFS Vendor Portal and make the applicable grant information updates before submitting for review and approval.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

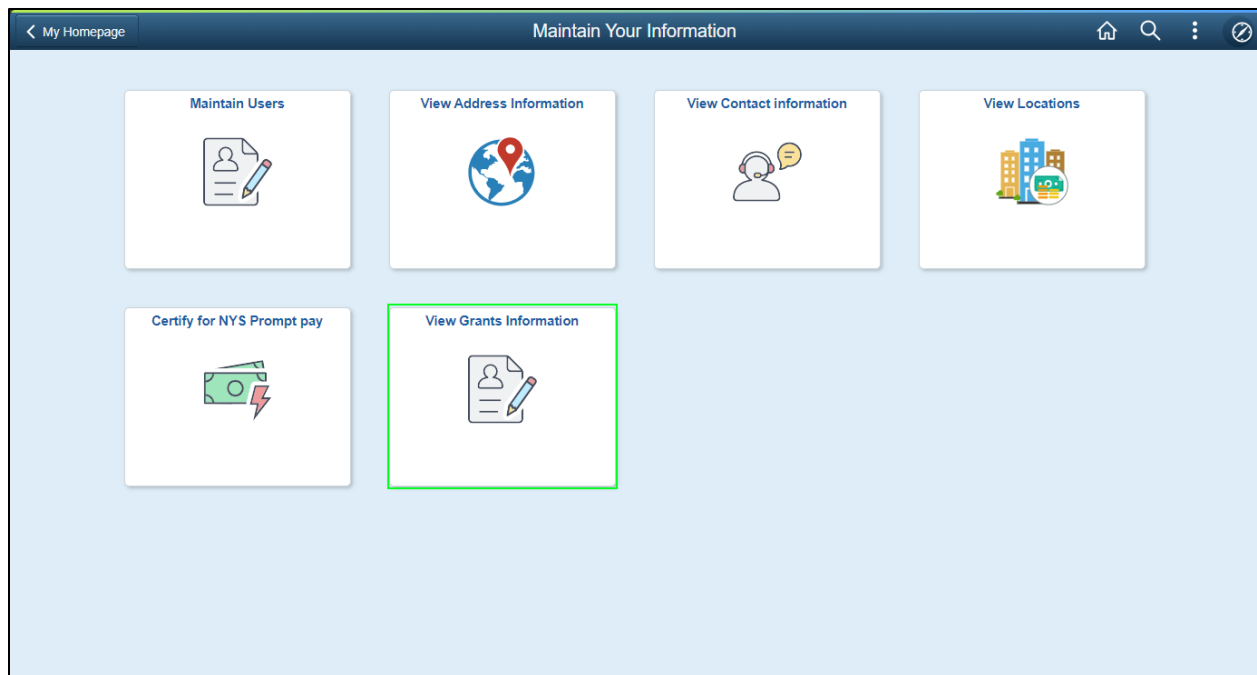


Step	Action
1.	Begin by navigating to the SFS Vendor Portal .
2.	Enter your User ID and Password and select the I agree to Vendor Online Services' Terms of Service checkbox.
3.	Click the Sign In button.

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Step	Action
4.	From the Homepage click the View Your Information tile.



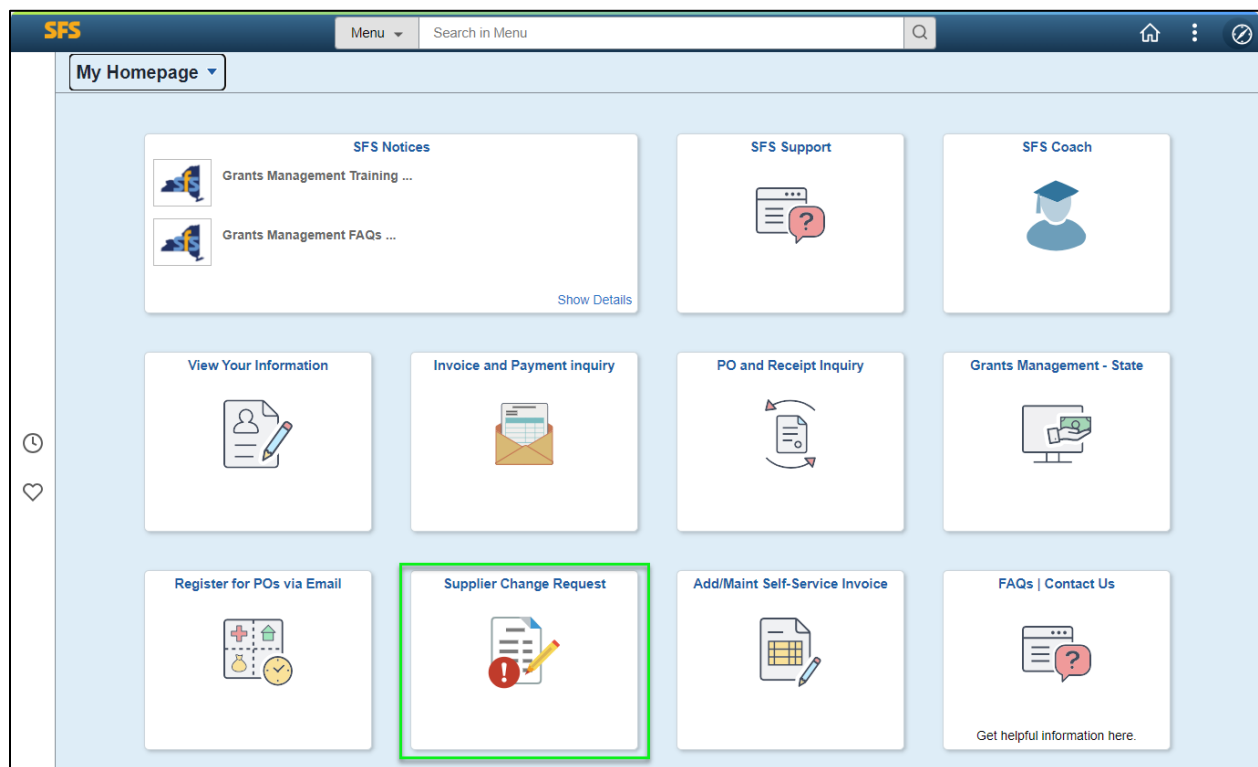
SFS Handbook: Grantee Processing in SFS

Step	Action
5.	Click the View Grants Information tile.

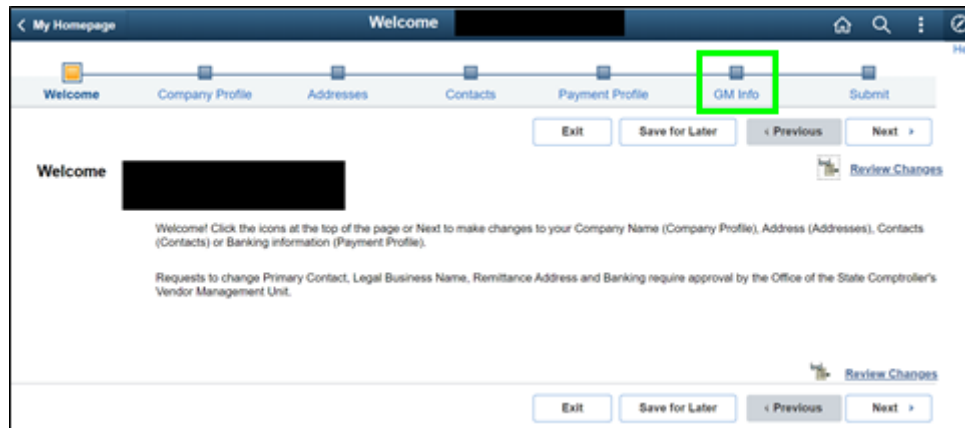
The screenshot displays the 'View Grants Information' page. At the top, there is a navigation bar with a '< Maintain Your Information' link and a 'View Grants Information' title. A green box highlights the 'Home' icon in the top right corner. Below the navigation bar, the page shows a form for grantee information. The form includes fields for SetID, Supplier ID, Effective Date (06/26/2023), Prequalification Exemption (unchecked), Prequalification Required (checked), Organization Type (Governmental Entity), Tax Year End Date, Charities Registration No., Current Operating Budget, Exemption State/Code (N/A), Prequalification Status (In Review By Agency), Number of Part Time Staff (2), Prequalification Exp.Date (11/15/2025), Number of Volunteers, Sectarian Entity (unchecked), Number of Full Time Staff (8), and Mission Statement. There are also links for 'Prequalification Page', 'Document Vault', and 'Audit Log'.

Step	Action
6.	Review the information. If changes are needed, initiate a Supplier Change Request.
7.	Note: <ul style="list-style-type: none"> The Supplier Change Request feature in SFS allows grantees to make changes to their organization profile, addresses, contacts, banking information, and grant information. Requests to change Primary Contact, Legal Business Name, Remittance Address and Banking require approval by the Office of the State Comptroller's Vendor Management Unit.
8.	Click the Home icon to go back to the Homepage to initiate the Supplier Change Request. 

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Step	Action
9.	Click the Supplier Change Request tile.



Step	Action
10.	Click the GM Info train stop.

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Welcome Company Profile Addresses Contacts Payment Profile GM Info Submit

Exit Save for Later < Previous **Next >**

Please update your Grants Management information. [Review Changes](#)

This information is used by NYS Agencies during the Grants Management Prequalification and/or Grant Opportunity - Vendor Bid Response Review process.

Bidder Grants [+](#)

*Effective Date: 06/26/2023 [📅](#)

Prequalification Required: ☐

Organization type: Not-For-Profit [▼](#)

Charities Registration Num:

Exemption State/Code: N/A [🔍](#)

Prequalification Status: RFI [▼](#)

Prequalification Exp. Date: 11/15/2025 [📅](#)

Sectorian Entity: ☐

Mission Statement: Our mission is building excellence in early care and learning settings while advancing equal access for all children in our community. We accomplish this through education, advocacy, and support for families and early childhood professionals. We envision that every child is cared for in a high

Tax Year End Date: [📅](#)

Fiscal Year End Date: 12/31/2023 [📅](#)

Current Operating Budget: [📄](#)

Number of Part Time Staff: 7 [📄](#)

Number of Volunteers: 19 [📄](#)

Number of Full Time Staff: 34 [📄](#)

[Prequalification Page](#)
[Document Vault](#)

Step	Action
11.	To update the information currently displayed, click the Add a New Row (+) icon.
12.	Make any needed updates to your Grants Management information.
13.	Select Next button.

< My Homepage Review and Submit Changes for CHILD CARE SOLUTIONS INC [🏠](#) [🔍](#) [⋮](#) [🔗](#)

Welcome Company Profile Addresses Contacts Payment Profile GM Info **Submit**

Exit Save for Later < Previous **Next >**

Review and Submit Changes for CHILD CARE SOLUTIONS INC

Requests to change Primary Contact, Legal Business Name, Remittance Addresses and Banking must be authorized. Review your changes before submitting your request.
Click the Confirm Changes checkbox to submit your request.
Use the "Review" button to review changed information.
Use the "Submit" button to submit your change request.
Email communication regarding this request will be sent to:

*Audit Reason Code: Multiple Changes [▼](#)

Comments:

254 characters remaining

☒ **Confirm Changes**

[Review](#) [Withdraw](#) [Submit](#)

Exit Save for Later < Previous **Next >**

Step	Action
14.	Select the applicable Audit Reason Code .
15.	Enter any additional information in the Comments field to clarify what was changed.
16.	Select Confirm Changes checkbox.

SFS Handbook: Grantee Processing in SFS

Step	Action
17.	Select Submit button to make the changes. Note: Upon submitting the Supplier Change Request, the information entered on the GM Info train stop will systematically update the corresponding fields on the View Grants Information Tab. Any changes made to information on the Grants Information tab will result in a new Effective Dated row.
18.	You have successfully completed the View and Update Grantee Information topic.

Adding a Grant Contract Approver's Name to their Profile in SFS

Topic Description:

This topic shows how to add a grant contract approver's name to their profile in SFS. This is needed so when the contract approver signs the grant contract in SFS, their name will display on the contract agreement.

Topic Objectives:

In this topic, you will learn:

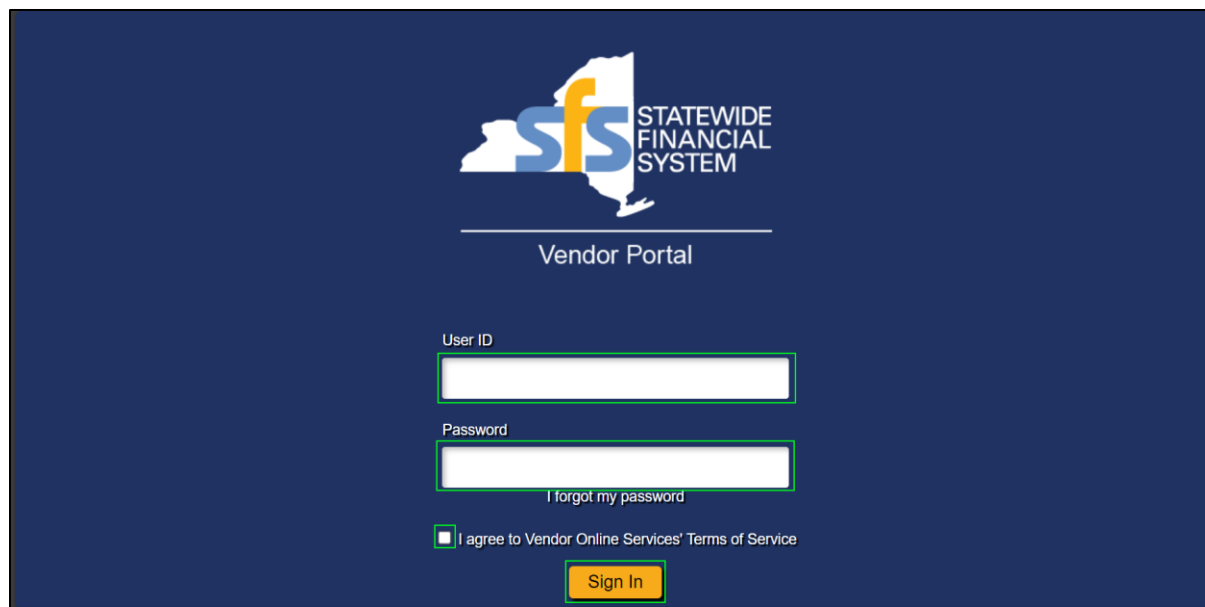
- How to add a grant contract approver's name to their profile in SFS

Procedure

Scenario: As a Delegated Administrator for your organization, you need to add the name of one of your organization's contract approvers to their profile in SFS. This is needed so when the contract approver signs the grant contract in SFS, their name will display on the contract agreement.

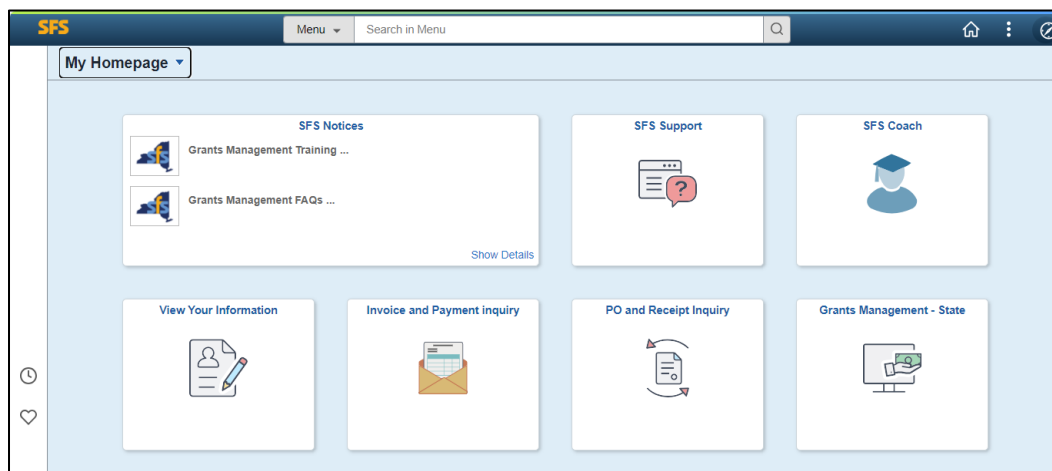
Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.


SFS Handbook: Grantee Processing in SFS



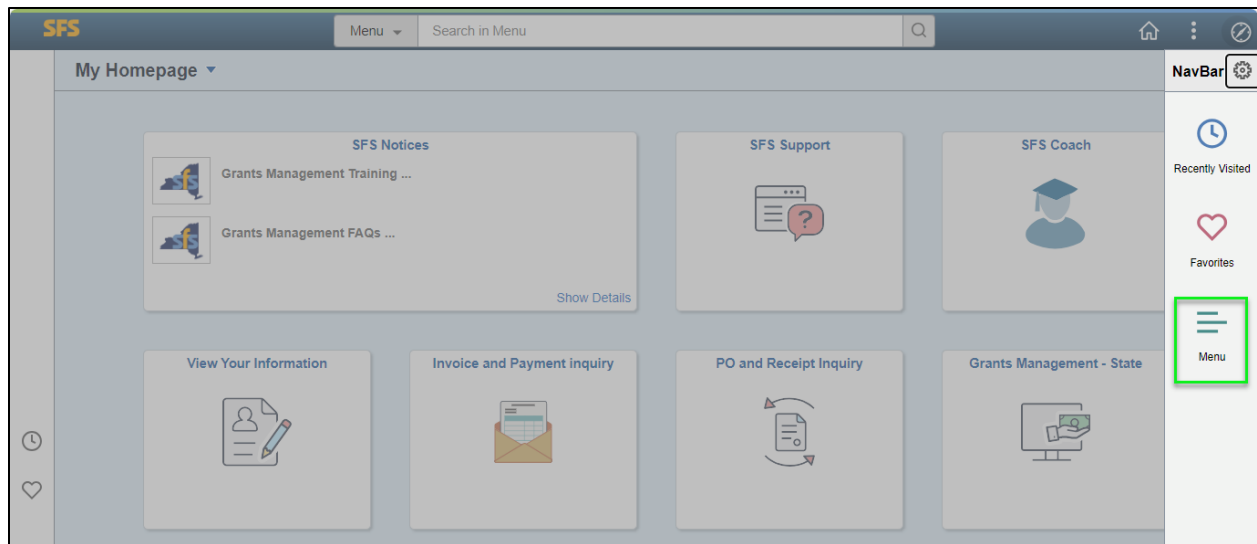
The image shows the SFS Vendor Portal login page. At the top, there is a logo for the Statewide Financial System (SFS) with the text 'STATEWIDE FINANCIAL SYSTEM' and 'Vendor Portal' below it. The login fields are labeled 'User ID' and 'Password'. Below the password field is a link that says 'I forgot my password'. There is a checkbox labeled 'I agree to Vendor Online Services' Terms of Service'. At the bottom, there is a yellow 'Sign In' button.

Step	Action
1.	Begin by navigating to the SFS Vendor Portal .
2.	Enter your User ID and Password and select the I agree to Vendor Online Services' Terms of Service checkbox.
3.	Click the Sign In button.

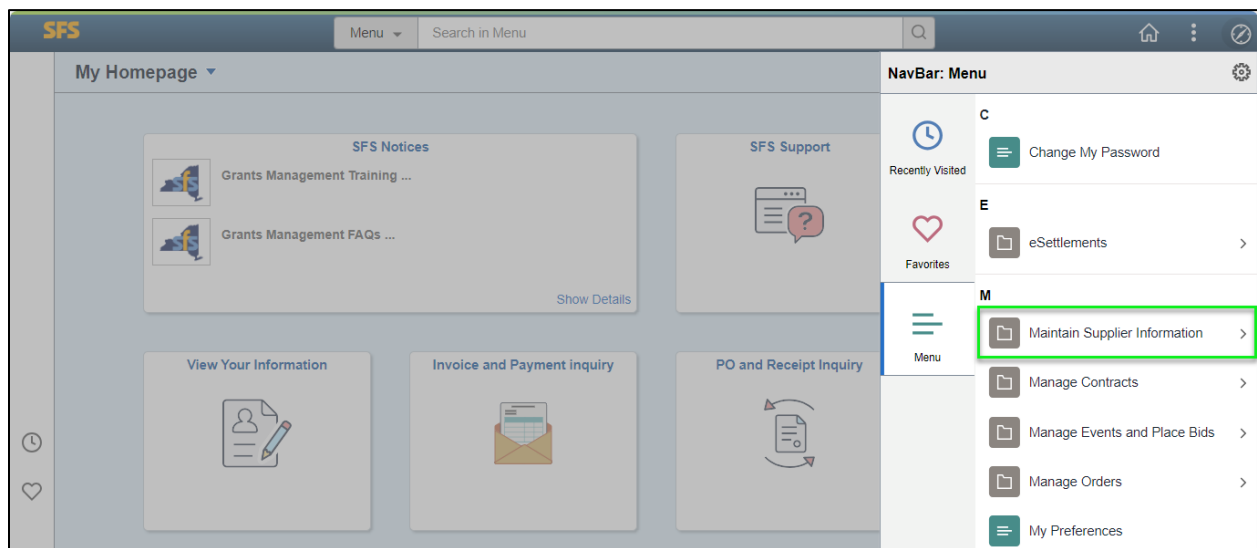


Step	Action
4.	<p>From the NavBar navigate to: Menu > Maintain Supplier Information > Manage User Profiles.</p> <p>Click the NavBar button.</p> 

SFS Handbook: Grantee Processing in SFS

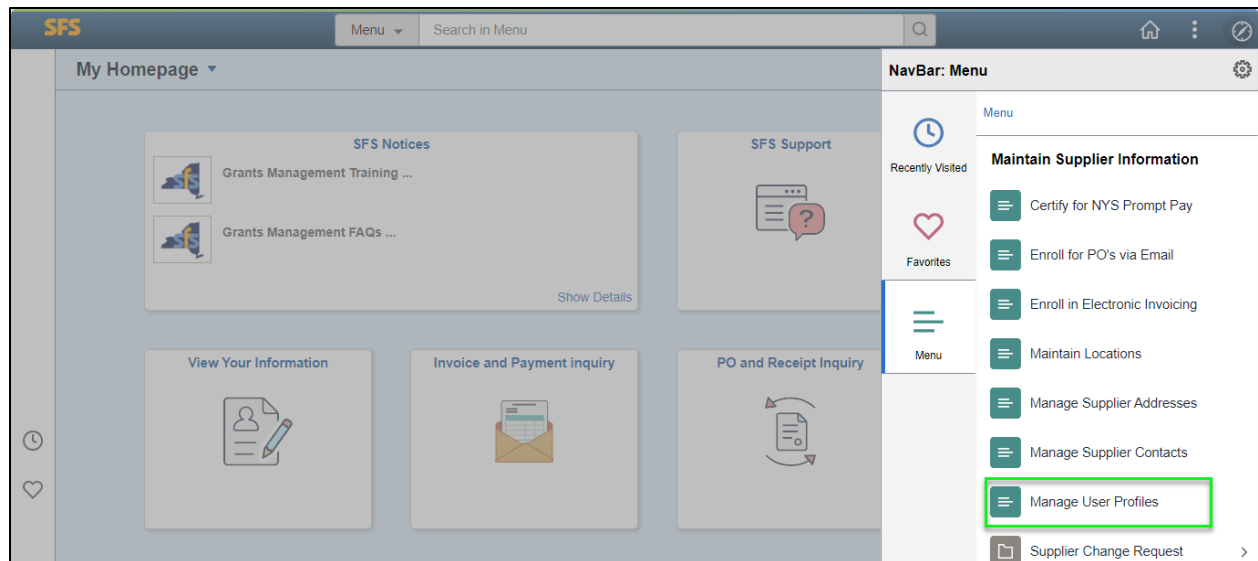


Step	Action
5.	Click the Menu button.

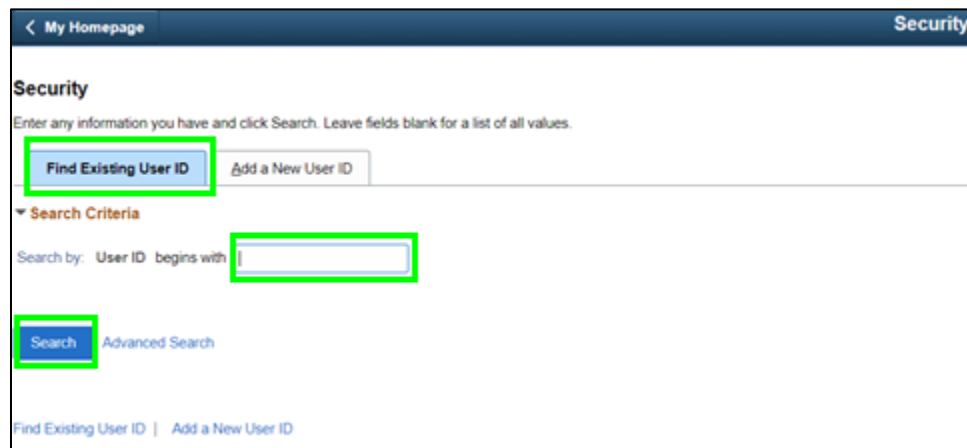


Step	Action
6.	Click the Maintain Supplier Information menu.

SFS Handbook: Grantee Processing in SFS



Step	Action
7.	Click the Manage User Profiles menu.



Step	Action
8.	Click the Find Existing User ID tab.
9.	Enter the contract approver's User ID in the User ID begins with field.
10.	Click the Search button.

SFS Handbook: Grantee Processing in SFS

The screenshot shows the 'Setup User' form in the SFS system. The 'Description' field, which is used for the contract approver's name, is highlighted with a green box and contains the text 'Doe, John'. Below this field are instructions: '(Examples: Smith, Fred)', a checkbox for 'Account Locked Out?', and a link '(Click here to disable the access to the system for this user)'. Other fields include 'User ID', 'Operator Password (Encrypted)', 'Confirm Password', '*E-mail Address' (with the value 'test123@sfs.ny.gov'), 'Language Code' (set to 'English'), 'Currency Code' (set to 'USD'), and 'Rate Type' (set to 'Current Rate').

Step	Action
11.	Enter the contract approver's name (Last Name, First Name) in the Description field. Note: This is needed so when the contract approver signs the grant contract in SFS, their name will display on the contract agreement.
12.	Click the Save button at the bottom of the page to save your changes.
13.	You have successfully completed the Adding a Grant Contract Approver's Name to their Profile in SFS topic.

Managing Prequalification Applications

Lesson Description:

This lesson provides the knowledge and skills to manage Prequalification information. Prequalification is a process applicable to not for profits or other organizations as defined by State policy, which requires the completion and acceptance of an online application in order to compete for state funding. The NYS Division of the Budget (DOB) is the policy-making body that drives the prequalification process.

Prequalification requires not for profits to complete an online application and receive an approved prequalification status prior to submitting a grant bid response.

Lesson Objectives:

In this lesson, you will learn how to:

- Enter and Submit Prequalification Information

Enter and Submit a Prequalification Application

Topic Description:

This topic provides the knowledge and skills to enter and submit a prequalification application. Organizations must complete an online Prequalification application in SFS which includes answering a series of questions regarding the organization and uploading key organizational documents.

SFS Handbook: Grantee Processing in SFS

Upon submission of the prequalification application, SFS routes the prequalification application to the state agency with which the organization expects to do the most business with. The agency indicator is based on criteria that exists on the grantee's profile in SFS.

Prequalification Specialists within the agency review the prequalification application. Agencies are responsible for approving the application or returning it back to the organization if it cannot be approved.

Grantees that have successfully prequalified will be assigned a prequalification expiration date based on policy.

Topic Objectives:

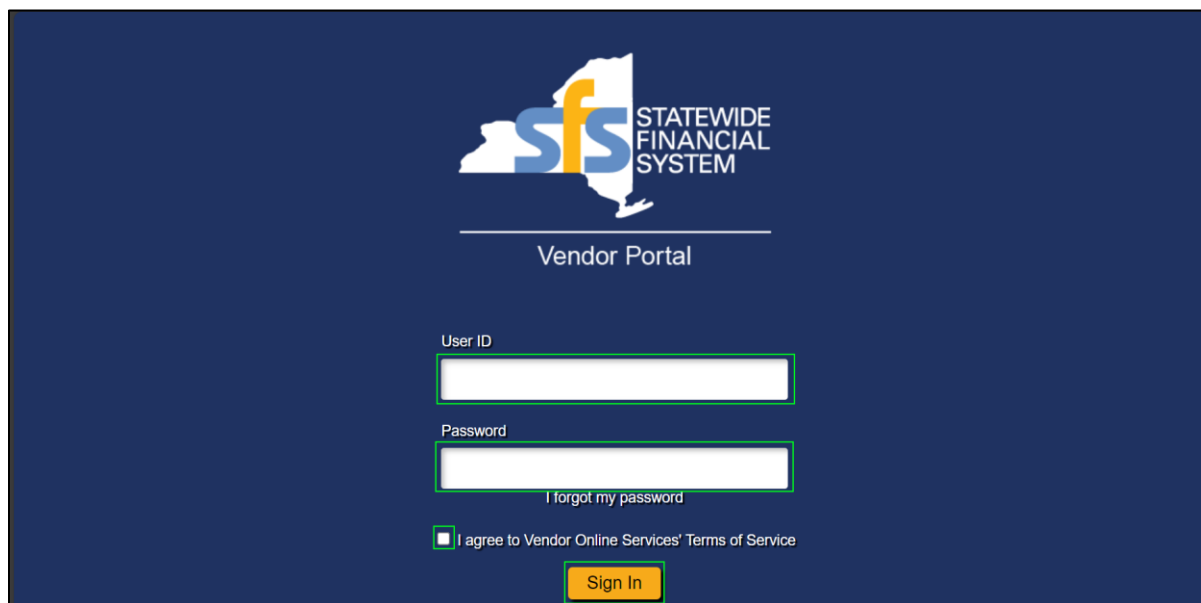
In this topic, you will learn:

- How to enter and submit a Prequalification Application

Procedure

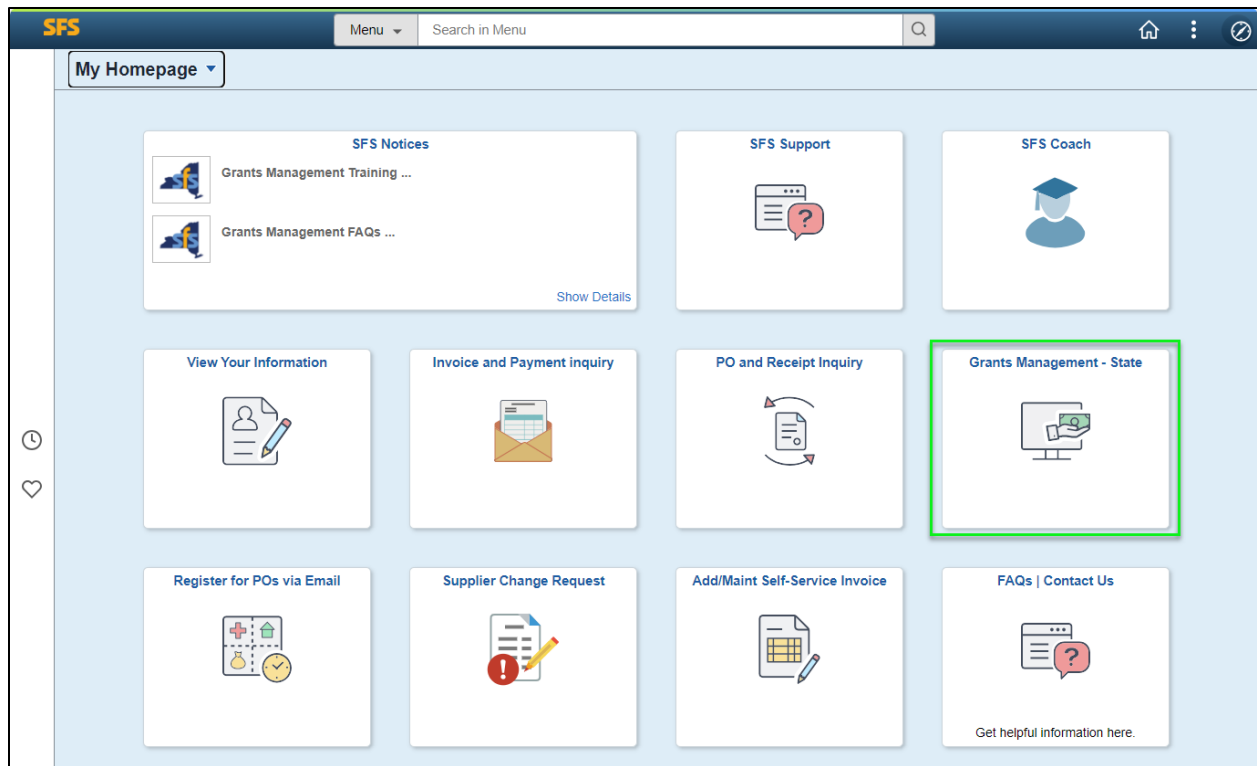
Scenario: As a Grantee User, you wish to apply for a grant, but first you must enter a Prequalification application with the Agency you are seeking the grant from. You will enter and submit a Prequalification application.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in SFS will be driven by the real-life transactional requirements.

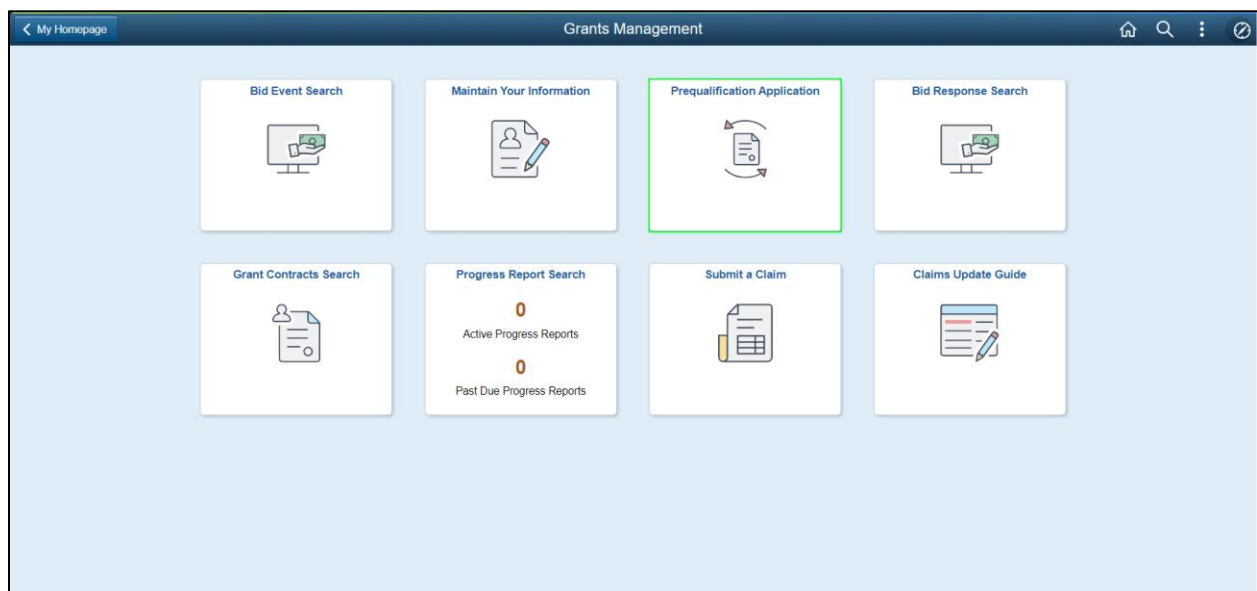


Step	Action
1.	Begin by navigating to the SFS Vendor Portal .
2.	Enter your User ID and Password and select the I agree to Vendor Online Services' Terms of Service checkbox.
3.	Click the Sign In button.

SFS Handbook: Grantee Processing in SFS



Step	Action
4.	<p>Preferred Navigation: Click the Grant Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > Manage Events and Place Bids > Prequalification.</p>



SFS Handbook: Grantee Processing in SFS

Step	Action
5.	Click the Prequalification Application tile.

The screenshot shows the 'Welcome Page' of the Grants Management system. It contains a 'Welcome Page' tab and a main content area with the following text:

New York State requires that all non-governmental organizations seeking grant funding from the State, excluding tribal organizations, prequalify in the Statewide Financial System (SFS) unless explicitly exempted by the Division of the Budget. The prequalification process allows the State to deem an organization qualified prior to allowing them to compete for a grant and potentially receive a State contract.

- Organizations must receive approved prequalification status prior to grant application and execution of contracts.
- New York State reserves up to 5-10 business days from the receipt of a complete prequalification application to conduct its review after which a determination of "Prequalified" or "Not Prequalified" will be made.
- Due to the length of time this process could take to complete, it is advised that organizations submit their Prequalification Application as soon as possible.
- Please note that approved prequalification status does not guarantee award of a contract. If an organization submits a grant application without successfully completing the prequalification process by the application due date and time, the grant application will be disqualified.
- An organization will not be able to submit a grant application in the SFS unless they are prequalified.

To get started, select one of the following options, then hit "Next":

- "Initiate a Prequalification Application" allows you to start a brand-new application.
- "Collaborate on a Prequalification Application" allows you to update an application that is in progress but has not yet been submitted for NYS Agency approval.
- "Update a Prequalification Application" is available once an organization's previous application has been approved/expired and begins a new application version.

Some Reminders:

- Use the "Next" and "Previous" buttons to move between steps (data entered will save as you move between steps).
- Once you have provided all the required information, select "Submit" to submit your application for review.
- You will receive an email confirmation shortly after submitting your application.

Additional information and instructions related to the prequalification process can be found in the New York State Prequalification Manual for Grantees located on the [Grants Management website](#).
If you have any questions regarding the prequalification process, please contact the SFS Help Desk by clicking on the SFS Support tile on your homepage, emailing HelpDesk@sfs.ny.gov, or calling 877-737-4185 toll-free.

Select an activity below

☒ Initiate a Prequalification Application

Prequalification Application Started

11/09/2023

Organization Type

Not-For-Profit

View Version history

Supplier ID: 1000051400

Next

Step	Action
6.	<p>On the Welcome Page, your Supplier ID is defaulted based on your user credentials, as well as your Organization Type. You are presented with one of the following options:</p> <ul style="list-style-type: none"> Initiate a Prequalification Application: allows you to start a brand-new application. This option only displays for application version 1. <ul style="list-style-type: none"> Note: Application version 1 represents the grantee's initial prequalification application with no prior versions in SFS. Collaborate on a Prequalification Application: allows you to update an application that is in progress but has not yet been submitted for NYS Agency approval. Update a Prequalification Application: is available once an organization's previous application has been approved/expired and begins a new application version. <p>Select the applicable option under the Select an Activity Below text.</p>

SFS Handbook: Grantee Processing in SFS

Grants Management
Welcome Page

Welcome Page

New York State requires that all non-governmental organizations seeking grant funding from the State, excluding tribal organizations, prequalify in the Statewide Financial System (SFS) unless explicitly exempted by the Division of the Budget. The prequalification process allows the State to deem an organization qualified prior to allowing them to compete for a grant and potentially receive a State contract.

- Organizations **must** receive approved prequalification status **prior** to grant application and execution of contracts.
- New York State reserves up to 5-10 business days from the receipt of a complete prequalification application to conduct its review after which a determination of "Prequalified" or "Not Prequalified" will be made.
- Due to the length of time this process could take to complete, it is advised that organizations submit their Prequalification Application as soon as possible.
- Please note that approved prequalification status does not guarantee award of a contract.** If an organization submits a grant application without successfully completing the prequalification process by the application due date and time, the grant application will be disqualified.
- An organization will not be able to submit a grant application in the SFS unless they are prequalified.

To get started, select one of the following options, then hit "Next":

- "Initiate a Prequalification Application" allows you to start a brand-new application.
- "Collaborate on a Prequalification Application" allows you to update an application that is in progress but has not yet been submitted for NYS Agency approval.
- "Update a Prequalification Application" is available once an organization's previous application has been approved/expired and begins a new application version.

Some Reminders:

- Use the "Next" and "Previous" buttons to move between steps (data entered will save as you move between steps).
- Once you have provided all the required information, select "Submit" to submit your application for review.
- You will receive an email confirmation shortly after submitting your application.

Additional information and instructions related to the prequalification process can be found in the New York State Prequalification Manual for Grantees located on the [Grants Management website](#).

If you have any questions regarding the prequalification process, please contact the SFS Help Desk by clicking on the SFS Support tile on your homepage, emailing HelpDesk@sfs.ny.gov, or calling 877-737-4185 toll-free.

Select an activity below

Initiate a Prequalification Application

Supplier ID
1000051400

Prequalification Application Started 11/09/2023

Organization Type Not-For-Profit

View Version history

Next

Step	Action
7.	Click the Next button.

Prequalification Application

Next >

Organization Information
Visited

Required Documents
Not Started

Contacts
Not Started

Submit
Not Started

Not-for-profit organizations must answer the following questions designed to provide State agencies with the information needed to make informed prequalification determinations.

Supplier ID 1000051400
Supplier Information
Prequalification Status Application In Progress
Version 1
View Version History

Supplier Name
Prequalification Expiration Date
Application ID 000016146

Email ID test123@sfs.ny.gov
Organization Type Not-For-Profit

State Agency OMH01
Office of Mental Health

Tax Year End Date
(MM/DD)

Profile Questions

1) Within the past five years, have you, the organization, and/or any organization affiliate:


a. Been suspended or debarred from any contracting process or been disqualified on any government procurement?

If yes, identify the government entity/owner(s) involved, project(s), contract number(s), relevant dates and any remedial or corrective action(s) taken and the current status of the issue(s).

Explanation/Comments

Save For Later

SFS Handbook: Grantee Processing in SFS

Step	Action
8.	<p>Enter the agency business unit that you expect to do business with into the State Agency field or click the magnifying glass icon to look up the information.</p> <p>If you are unsure of the business unit for the State Agency you expect to do business with, click the magnifying glass to view a list of business units and state agencies.</p> 

Cancel

Lookup

Search for: State Agency

▼ Search Criteria

Show Operators

Business Unit (begins with)

Search Clear

▼ Search Results

33 rows

Business Unit	State Agency Name
DVA01	Office of Veterans' Affairs
ESD01	Empire State Development
GTS01	Governor's Traffic Safety Committee
HCR01	NYS Homes and Community Renewal
HES01	Higher Education Services Corporation
IOL01	Interest on Lawyers Account
JUS01	Justice Center
OAS01	Office of Addiction Services and Supports
OFA01	Office for the Aging
OLS01	Office of Indigent Legal Services
OMH01	Office of Mental Health
OPD01	Office for People with Developmental Disabilities
OVS01	Office of Victim Services

Step	Action
9.	Click the scrollbar to scroll through the list of agencies and select the business unit associated to the state agency that you expect to do business with.

SFS Handbook: Grantee Processing in SFS

Prequalification Application

Exit Next

Organization Information Visited

Required Documents
☐ Not Started

Contacts
☐ Not Started

Submit
☐ Not Started

Not-for-profit organizations must answer the following questions designed to provide State agencies with the information needed to make informed prequalification determinations.

Supplier ID 1000051400 Supplier Information

Supplier Name [Redacted]

Email ID test123@sfs.ny.gov

Prequalification Status Application In Progress Version 1 View Version History

Prequalification Expiration Date

Organization Type Not-For-Profit

State Agency OMH01 Office of Mental Health

Tax Year End Date (MM/DD)

Profile Questions

1) Within the past five years, have you, the organization, and/or any organization affiliate:
a. Been suspended or debarred from any contracting process or been disqualified on any government procurement?
If yes, identify the government entity/owner(s) involved, project(s), contract number(s), relevant dates and any remedial or corrective action(s) taken and the current status of the issue(s).

Explanation/Comments

Step	Action
10.	Enter the applicable tax year end date (format MM/DD) into the Tax Year End Date field.

Prequalification Application

Exit Next

Organization Information Visited

Required Documents
☐ Not Started

Contacts
☐ Not Started

Submit
☐ Not Started

Profile Questions

1) Within the past five years, have you, the organization, and/or any organization affiliate:
a. Been suspended or debarred from any contracting process or been disqualified on any government procurement?
If yes, identify the government entity/owner(s) involved, project(s), contract number(s), relevant dates and any remedial or corrective action(s) taken and the current status of the issue(s).

Explanation/Comments

Text Responses

2) Within the past five years, have you, the organization, and/or any organization affiliate:
b. Been subject to a denial or revocation of a government prequalification?
If yes, identify the government entity/owner(s) involved, project(s), contract number(s), relevant dates and any remedial or corrective action(s) taken and the current status of the issue(s).

Explanation/Comments

Text Responses

3) Within the past five years, have you, the organization, and/or any organization affiliate:
c. Been denied a contract or had a bid rejected based upon a finding of non-responsibility by a government entity?
If yes, provide a brief description of the circumstances of such incident(s) and any remedial or corrective action(s) taken and the current status of the issue(s).

Explanation/Comments

Text Responses

SFS Handbook: Grantee Processing in SFS

Step	Action
11.	Organizations must complete an online Prequalification application in SFS which includes answering Profile Questions regarding the organization and uploading key organizational documents. Note: Questions may vary based on your Organization Type .
12.	Complete the Questions by clicking the applicable drop-down list and selecting either Yes or No . Note: Some questions may ask for additional explanation depending on your answer. If so, add your explanation in the Explanation/Comments field as appropriate.

Step	Action
13.	Complete questions shown as List Item by selecting the magnifying glass which is question 15 in this example. Note: There are two list item questions (questions 15 and 18).

SFS Handbook: Grantee Processing in SFS

The screenshot shows the 'Prequalification Application' window. A 'List Options' dialog box is open, displaying a table with 3 rows of options. The 'Return' button is highlighted. The background application shows a sidebar with 'Organization Information' (Visited), 'Required Documents' (Not Started), 'Contacts' (Not Started), and 'Submit' (Not Started). The main content area shows questions 14, 15, and 16.

List Line Number	Policy Type
1	Yes
2	No
3	N/A

Step	Action
14.	Select one of the options from List Options .
15.	Click Return .

The screenshot shows the 'Prequalification Application' window. The 'List Options' dialog box is open, and the 'List Item' field is highlighted. The background application shows the same sidebar as the previous screenshot. The main content area shows questions 17 and 18.

SFS Handbook: Grantee Processing in SFS

Step	Action
16.	Complete questions shown as List Item by selecting the magnifying glass which is question 18 in this example.

List Options

List Values

10 rows

List Line Number ▾	Select ▾	Policy Type ▾
1	<input checked="" type="checkbox"/>	Annual Operating Budget
2	<input checked="" type="checkbox"/>	Policies and Procedures
3	<input checked="" type="checkbox"/>	Executive Performance and Compensation
4	<input checked="" type="checkbox"/>	Fundraising Plan
5	<input checked="" type="checkbox"/>	Internal Controls
6	<input checked="" type="checkbox"/>	Fiscal Controls
7	<input checked="" type="checkbox"/>	Annual Audit
8	<input checked="" type="checkbox"/>	Form 990
9	<input checked="" type="checkbox"/>	Program Operations and Performance Outcomes
10	<input checked="" type="checkbox"/>	Other (Please add details to Comment box at bottom of page)

Return


Step	Action
17.	Select Yes for all the items your board reviews and/or approves.
18.	Click Return .

SFS Handbook: Grantee Processing in SFS

The screenshot shows the 'Prequalification Application' window. On the left is a sidebar with navigation links: 'Organization Information' (marked as 'Visited'), 'Required Documents' (marked as 'Not Started'), 'Contacts' (marked as 'Not Started'), and 'Submit' (marked as 'Not Started'). The main content area contains two questions:

- Question 17:** 'Does your board of directors take minutes of all meetings and maintain records of such meetings consistent with its bylaws?' It has a dropdown for 'Explanation/Comments' and a 'Text Responses' text area.
- Question 18:** 'Indicate all of the items the board of directors reviews and/or approves. If your board reviews some but not all of these items, please explain.' It has a 'List Item' dropdown and a 'Text Responses' text area.

At the bottom, a 'Comments' field is highlighted with a green border. It contains the text 'None at this time.' and has a 'Next' button to its right.

Step	Action
19.	<p>Enter any additional comments that you want the agency to see, in the Comments field located at the bottom of the page.</p> <p>Note: The Comments field could also be used to explain why your organization reviews some, but not all of the items listed in question 18.</p>
20.	<p>Click the Next button.</p> 

SFS Handbook: Grantee Processing in SFS

Prequalification Application

Exit Previous Next

Organization Information
● Visited

Required Documents
● Visited

Contacts
○ Not Started

Submit
○ Not Started

Organizations must upload documents via "Attach" or "Attach with Additional Details" link below, depending on the specific document, which will be evaluated as part of the prequalification process. Documents must be in PDF format and under 20MB in size.

Supplier ID 1000051400

Supplier Name [REDACTED]

Save For Later

Attachments

10 rows

Required Documents	Attach	View/Delete	Attach with Additional Date Details	Date Attached/Uploaded	Attached/Uploaded By
1 Certificate of Incorporation or Equivalent Document	Attach	View/Delete	Attach with Additional Date Details		
2 Certificate of Assumed Name or DBA, if applicable	Attach	View/Delete	Attach with Additional Date Details		
3 IRS 501(c) Determination Letter	Attach	View/Delete	Attach with Additional Date Details		
4 Board of Directors Profile	Attach	View/Delete	Attach with Additional Date Details		
5 Senior Leadership Resumes	Attach	View/Delete	Attach with Additional Date Details		
6 Corporate Bylaws	Attach	View/Delete	Attach with Additional Date Details		
7 Organization Chart	Attach	View/Delete	Attach with Additional Date Details		
8 IRS 990	Attach	View/Delete	Attach with Additional Date Details		
9 Financial Statement/Audit	Attach	View/Delete	Attach with Additional Date Details		
10 CHAR500 or CHAR410	Attach	View/Delete	Attach with Additional Date Details		

Comments

Step	Action
21.	The Required Documents page is where you will upload the required documents for the agency to review.
22.	<p>On the Required Documents page:</p> <ul style="list-style-type: none"> All attachments must be in PDF format. Uploading any other document types will result in automatic deletion by the system. All rows must have an attachment uploaded for the Submit button to appear on the Prequalification application. You may need to scroll to see all the documents.

SFS Handbook: Grantee Processing in SFS

Prequalification Application

Organizations must upload documents via "Attach" or "Attach with Additional Details" link below, depending on the specific document, which will be evaluated as part of the prequalification process. Documents must be in PDF format and under 20MB in size.

Supplier ID 1000051400

Supplier Name [REDACTED]

Save For Later

Attachments

Required Documents	Attach	View/Delete	Attach with Additional Date Details	Date Attached/Uploaded	Attached/Uploaded By
1 Certificate of Incorporation or Equivalent Document	Attach	View/Delete	Attach with Additional Date Details		
2 Certificate of Assumed Name or DBA, if applicable	Attach	View/Delete	Attach with Additional Date Details		
3 IRS 501(c) Determination Letter	Attach	View/Delete	Attach with Additional Date Details		
4 Board of Directors Profile	Attach	View/Delete	Attach with Additional Date Details		
5 Senior Leadership Resumes	Attach	View/Delete	Attach with Additional Date Details		
6 Corporate Bylaws	Attach	View/Delete	Attach with Additional Date Details		
7 Organization Chart	Attach	View/Delete	Attach with Additional Date Details		
8 IRS 990	Attach	View/Delete	Attach with Additional Date Details		
9 Financial Statement/Audit	Attach	View/Delete	Attach with Additional Date Details		
10 CHAR500 or CHAR410	Attach	View/Delete	Attach with Additional Date Details		

Comments

Step	Action
23.	To add an attachment, click the Attach link.

Prequalification Application

Organizations must upload documents via "Attach" or "Attach with Additional Details" link below, depending on the specific document, which will be evaluated as part of the prequalification process. Documents must be in PDF format and under 20MB in size.

Supplier ID 1000051400

Supplier Name [REDACTED]


Save For Later

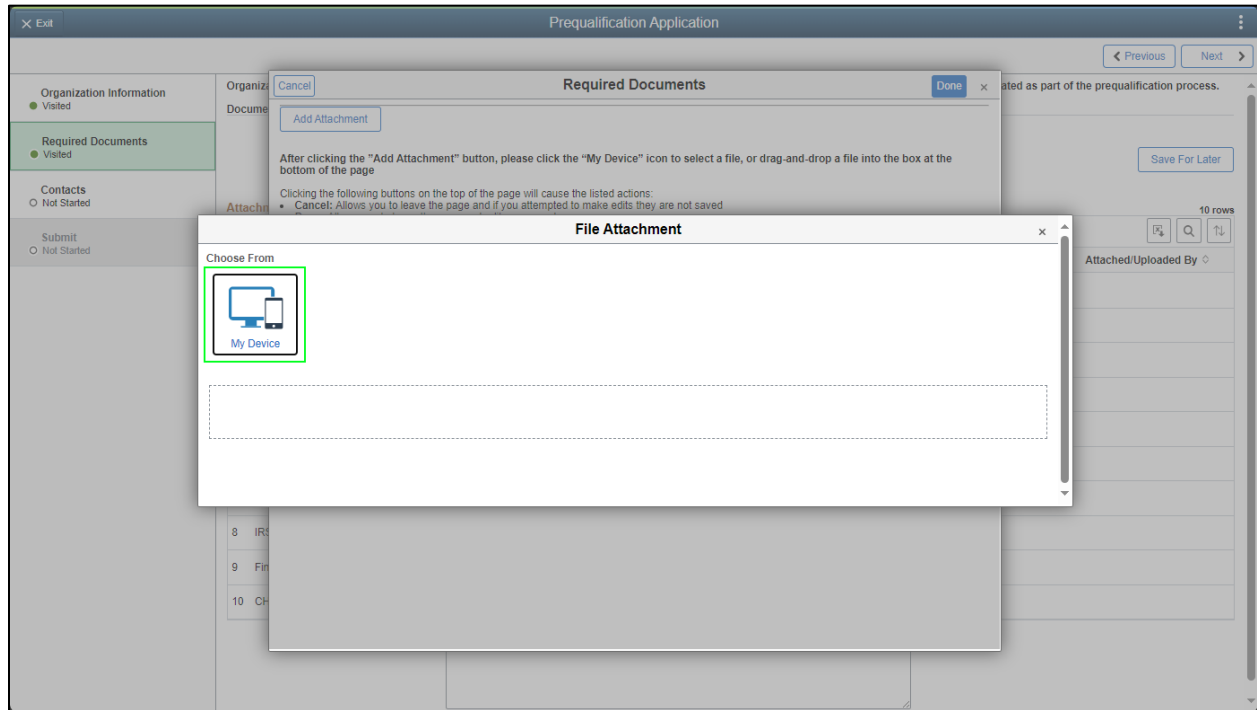
Attachments

Required Documents	Attach	View/Delete	Attach with Additional Date Details	Date Attached/Uploaded	Attached/Uploaded By
1 Certificate of Incorporation or Equivalent Document	Attach	View/Delete	Attach with Additional Date Details		
2 Certificate of Assumed Name or DBA, if applicable	Attach	View/Delete	Attach with Additional Date Details		
3 IRS 501(c) Determination Letter	Attach	View/Delete	Attach with Additional Date Details		
4 Board of Directors Profile	Attach	View/Delete	Attach with Additional Date Details		
5 Senior Leadership Resumes	Attach	View/Delete	Attach with Additional Date Details		
6 Corporate Bylaws	Attach	View/Delete	Attach with Additional Date Details		
7 Organization Chart	Attach	View/Delete	Attach with Additional Date Details		
8 IRS 990	Attach	View/Delete	Attach with Additional Date Details		
9 Financial Statement/Audit	Attach	View/Delete	Attach with Additional Date Details		
10 CHAR500 or CHAR410	Attach	View/Delete	Attach with Additional Date Details		

Comments

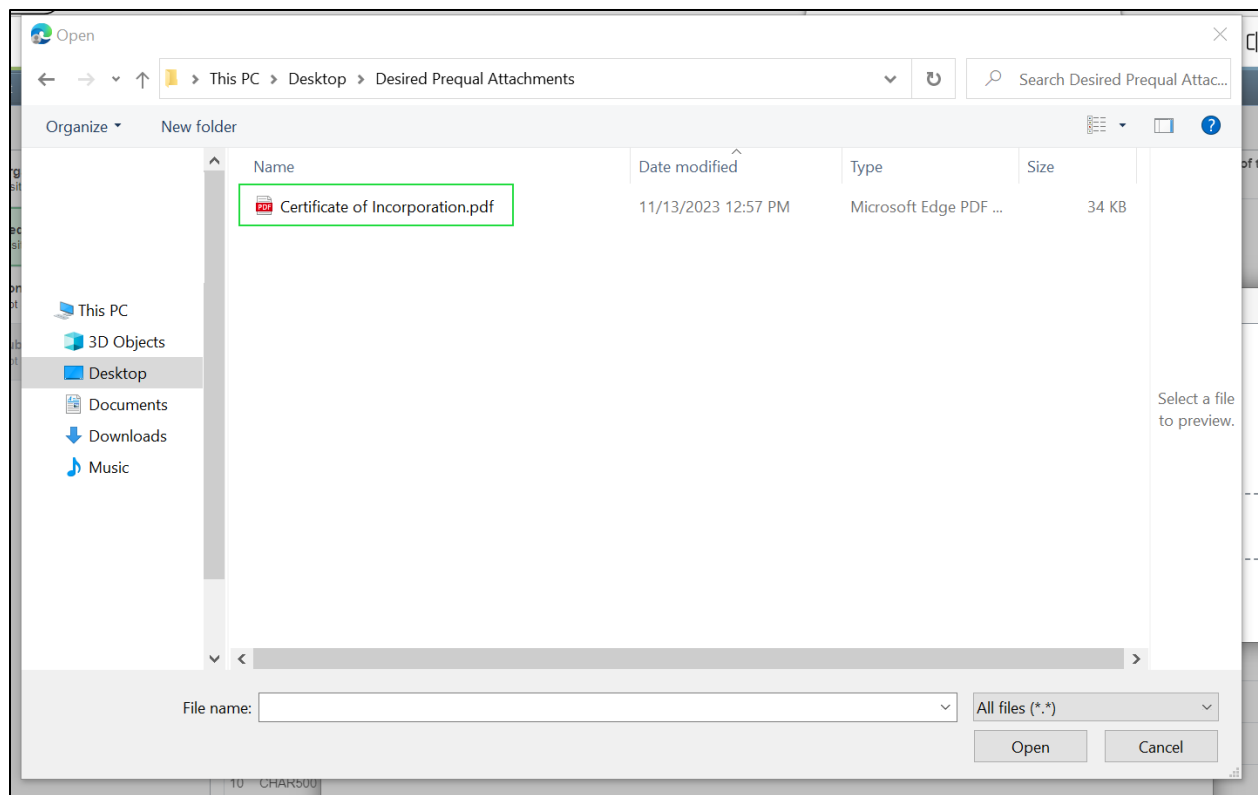
SFS Handbook: Grantee Processing in SFS

Step	Action
24.	Click the Add Attachment button. 



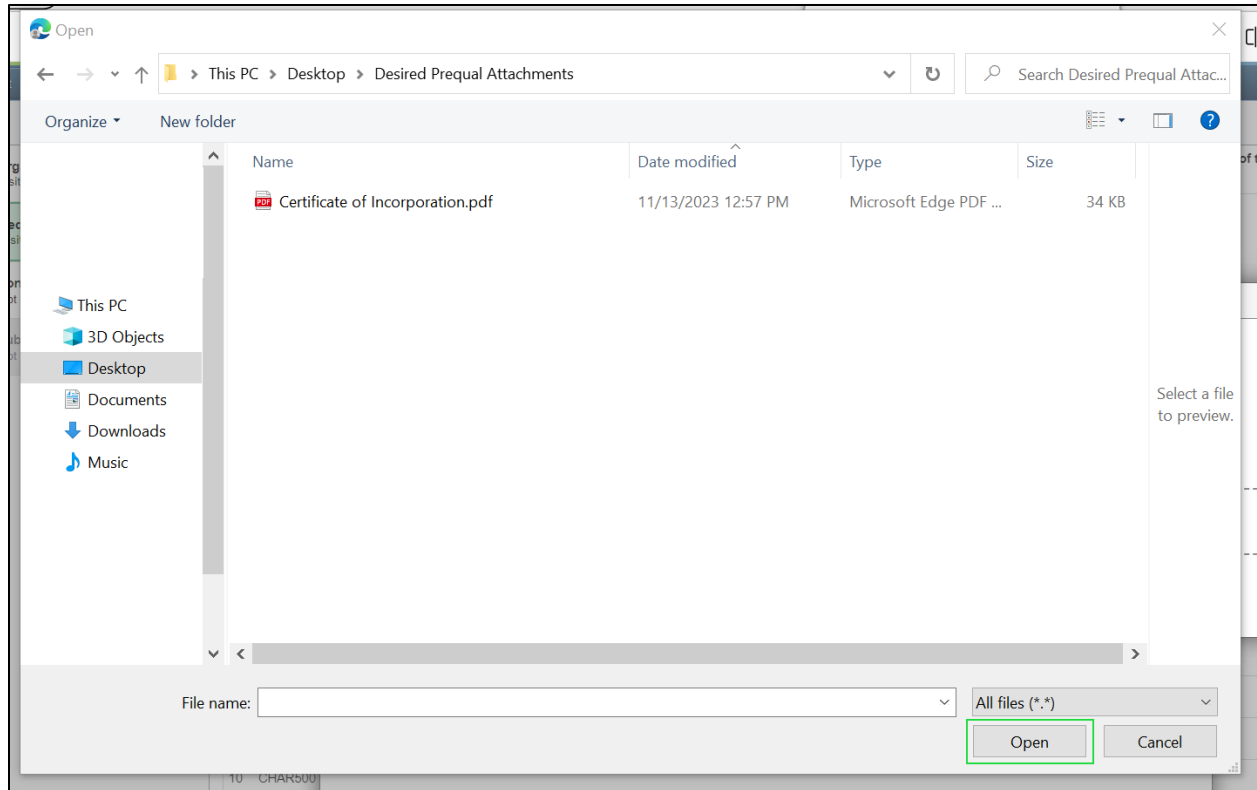
Step	Action
25.	Click the My Device button.

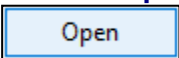
SFS Handbook: Grantee Processing in SFS



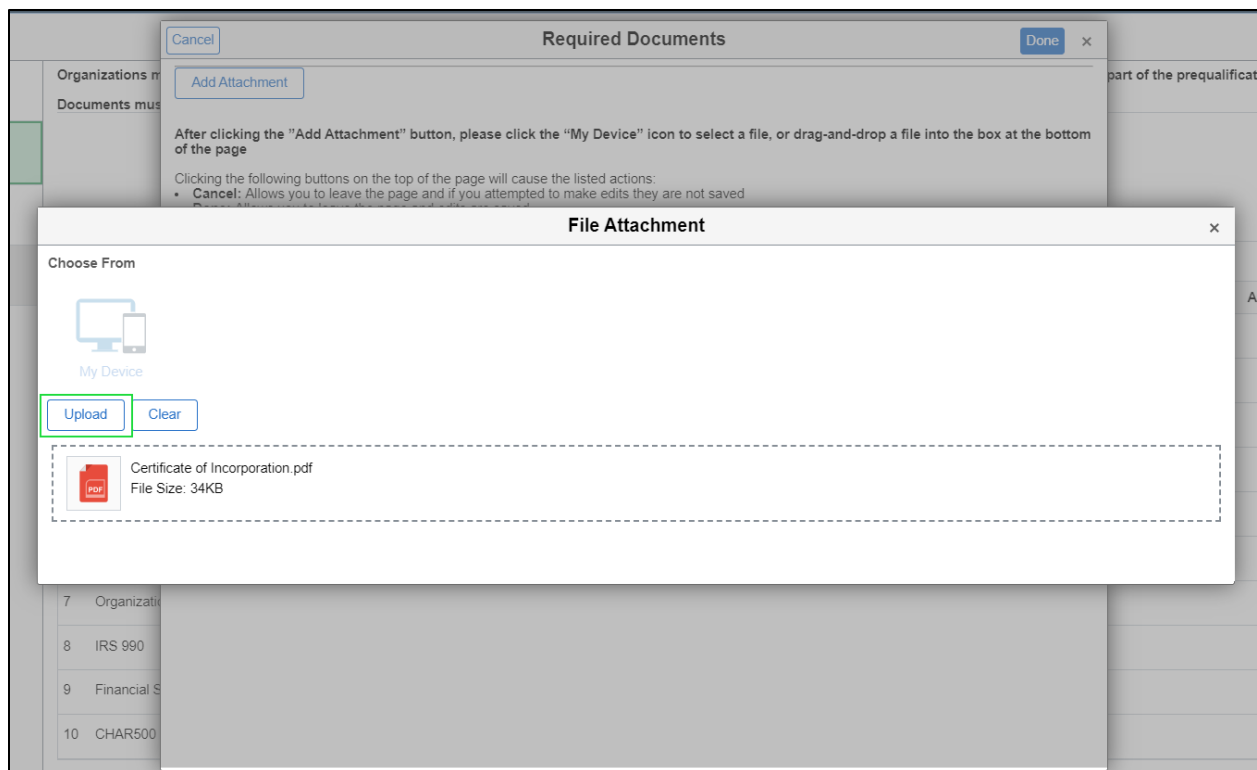
Step	Action
26.	Navigate to the directory location and select the applicable document for attachment.

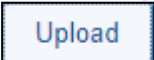
SFS Handbook: Grantee Processing in SFS



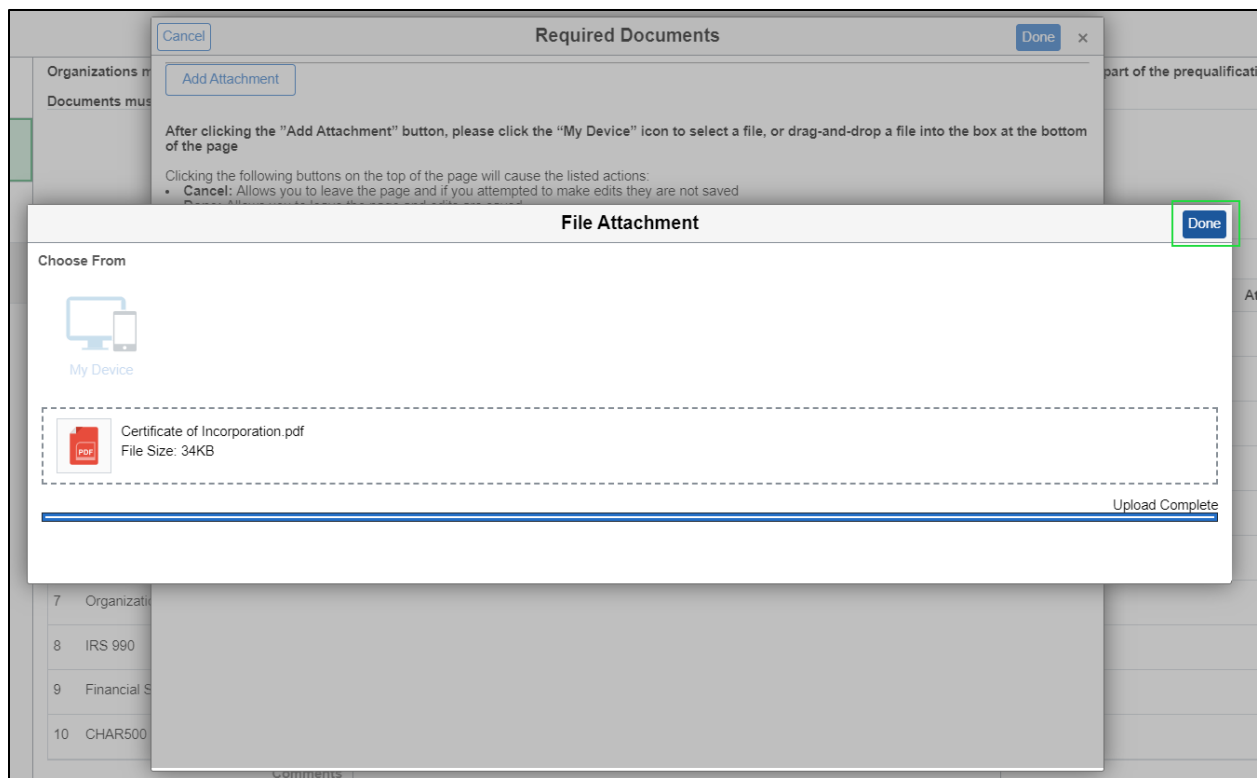
Step	Action
27.	Click the Open button. <div></div>


SFS Handbook: Grantee Processing in SFS



Step	Action
28.	Click the Upload button. 

SFS Handbook: Grantee Processing in SFS



Step	Action
29.	Click the Done button. 

SFS Handbook: Grantee Processing in SFS

Required Documents

File Name	Application ID	SetID	Supplier ID	Version Number	Description	User ID	Date/Time Stamp
Certificate_of_Incorporation.pdf	000016146	SHARE	1000051400	1			11/13/2023 1:14:46P

[Add Attachment](#)

After clicking the "Add Attachment" button, please click the "My Device" icon to select a file, or drag-and-drop a file into the box at the bottom of the page

Clicking the following buttons on the top of the page will cause the listed actions:

- **Cancel:** Allows you to leave the page and if you attempted to make edits they are not saved
- **Done:** Allows you to leave the page and edits are saved
- **X:** Closes out the page without saving changes

Step	Action
30.	Enter the applicable value in the Description field which should describe the document that was just attached. Note: This description will be visible to both agency and grantee.

SFS Handbook: Grantee Processing in SFS

Cancel

Required Documents

Done

File Name

Application ID

SetID

Supplier ID

Version Number

Description

User ID

Date/Time Stamp

Certificate_of_Incorporation.pdf

000016146

SHARE

1000051400

1

11/13/2023 1:14:46P

Add Attachment

After clicking the "Add Attachment" button, please click the "My Device" icon to select a file, or drag-and-drop a file into the box at the bottom of the page

Clicking the following buttons on the top of the page will cause the listed actions:

- Cancel:** Allows you to leave the page and if you attempted to make edits they are not saved
- Done:** Allows you to leave the page and edits are saved
- X:** Closes out the page without saving changes

Step	Action
31.	Click the Done button.

Exit

Prequalification Application

Previous

Next

Organization Information

Visited

Required Documents

Visited

Contacts

Not Started

Submit

Not Started

Organizations must upload documents via "Attach" or "Attach with Additional Details" link below, depending on the specific document, which will be evaluated as part of the prequalification process. Documents must be in PDF format and under 20MB in size.

Supplier ID 1000051400

Supplier Name

Save For Later

Attachments

10 rows

Required Documents	Attach	View/Delete	Attach with Additional Date Details	Date Attached/Uploaded	Attached/Uploaded By
1 Certificate of Incorporation or Equivalent Document	Attach	View/Delete	Attach with Additional Date Details		
2 Certificate of Assumed Name or DBA, if applicable	Attach	View/Delete	Attach with Additional Date Details		
3 IRS 501(c) Determination Letter	Attach	View/Delete	Attach with Additional Date Details		
4 Board of Directors Profile	Attach	View/Delete	Attach with Additional Date Details		
5 Senior Leadership Resumes	Attach	View/Delete	Attach with Additional Date Details		
6 Corporate Bylaws	Attach	View/Delete	Attach with Additional Date Details		
7 Organization Chart	Attach	View/Delete	Attach with Additional Date Details		
8 IRS 990	Attach	View/Delete	Attach with Additional Date Details		
9 Financial Statement/Audit	Attach	View/Delete	Attach with Additional Date Details		
10 CHAR500 or CHAR410	Attach	View/Delete	Attach with Additional Date Details		

Comments

SFS Handbook: Grantee Processing in SFS

Step	Action
32.	Follow the same process to add attachments for any additional rows, using the Attach link.

Prequalification Application

Organization Information Visited

Required Documents Visited

Contacts Not Started

Submit Not Started

Organizations must upload documents via "Attach" or "Attach with Additional Details" link below, depending on the specific document, which will be evaluated as part of the prequalification process. Documents must be in PDF format and under 20MB in size.

Supplier ID 1000051400

Supplier Name [REDACTED]

Save For Later

Attachments

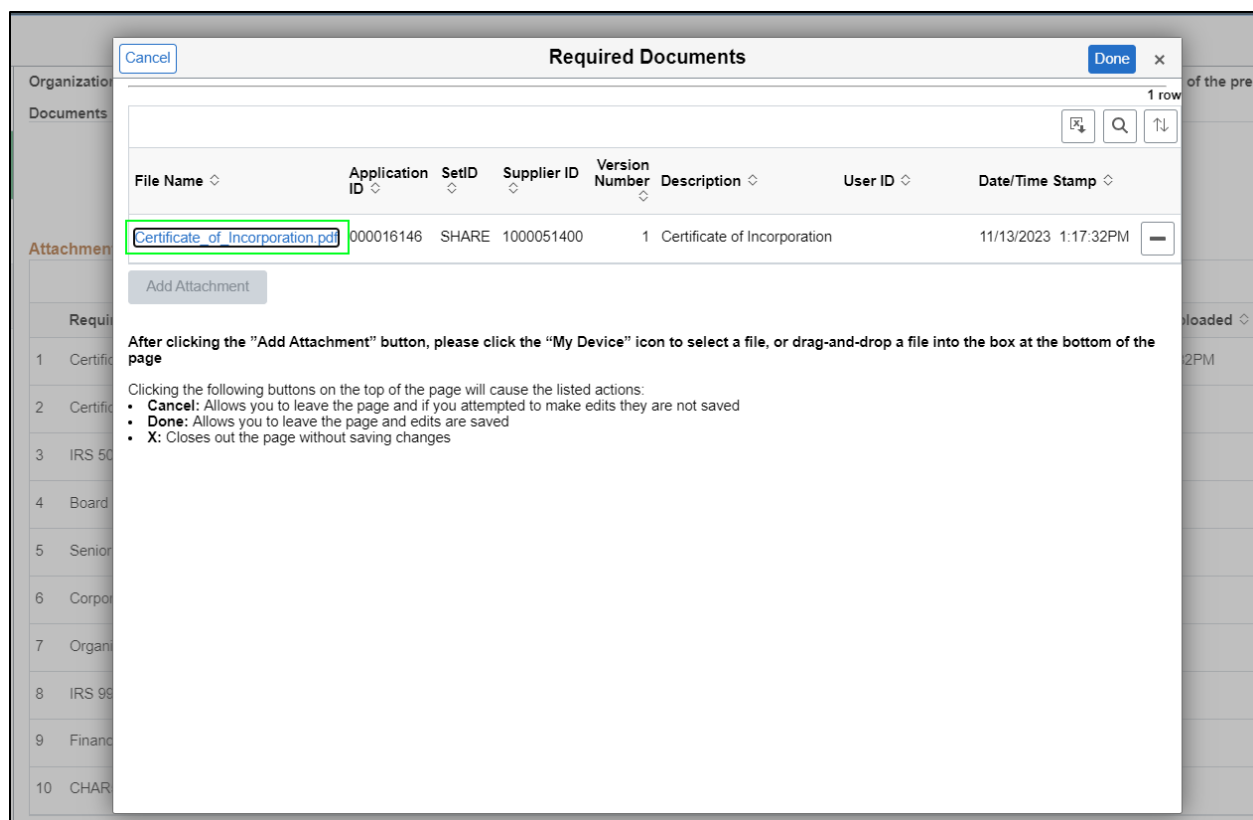
Required Documents	Attach	View/Delete	Attach with Additional Date Details	Date Attached/Uploaded	Attached/Uploaded By
1 Certificate of Incorporation or Equivalent Document	Attach	View/Delete	Attach with Additional Date Details		
2 Certificate of Assumed Name or DBA, if applicable	Attach	View/Delete	Attach with Additional Date Details		
3 IRS 501(c) Determination Letter	Attach	View/Delete	Attach with Additional Date Details		
4 Board of Directors Profile	Attach	View/Delete	Attach with Additional Date Details		
5 Senior Leadership Resumes	Attach	View/Delete	Attach with Additional Date Details		
6 Corporate Bylaws	Attach	View/Delete	Attach with Additional Date Details		
7 Organization Chart	Attach	View/Delete	Attach with Additional Date Details		
8 IRS 990	Attach	View/Delete	Attach with Additional Date Details		
9 Financial Statement/Audit	Attach	View/Delete	Attach with Additional Date Details		
10 CHAR500 or CHAR410	Attach	View/Delete	Attach with Additional Date Details		

Comments

10 rows

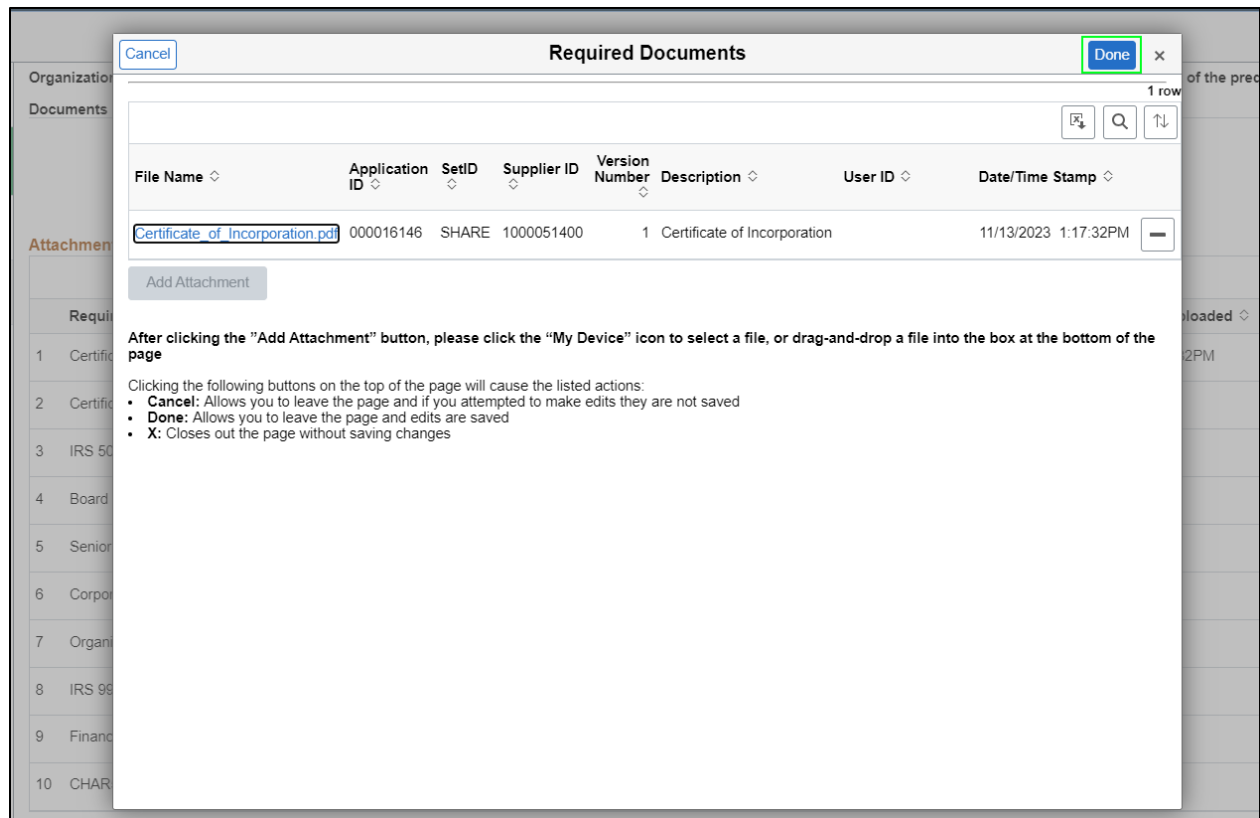
Step	Action
33.	To view an existing attachment, click the View/Delete button. Note: If the View/Delete button is not active, then a document hasn't been attached.

SFS Handbook: Grantee Processing in SFS



Step	Action
34.	To open the attachment, click the File Name link .
	In this example, we will not open the linked attachment.

SFS Handbook: Grantee Processing in SFS



Step	Action
35.	When you are finished viewing attachments, click the Done button.

SFS Handbook: Grantee Processing in SFS

Prequalification Application

Organizations must upload documents via "Attach" or "Attach with Additional Details" link below, depending on the specific document, which will be evaluated as part of the prequalification process. Documents must be in PDF format and under 20MB in size.

Supplier ID 1000051400

Supplier Name [REDACTED]

[Save For Later](#)

Attachments

Required Documents	Attach	View/Delete	Attach with Additional Date Details	Date Attached/Uploaded	Attached/Uploaded By
1 Certificate of Incorporation or Equivalent Document	Attach	View/Delete	Attach with Additional Date Details		
2 Certificate of Assumed Name or DBA, if applicable	Attach	View/Delete	Attach with Additional Date Details		
3 IRS 501(c) Determination Letter	Attach	View/Delete	Attach with Additional Date Details		
4 Board of Directors Profile	Attach	View/Delete	Attach with Additional Date Details		
5 Senior Leadership Resumes	Attach	View/Delete	Attach with Additional Date Details		
6 Corporate Bylaws	Attach	View/Delete	Attach with Additional Date Details		
7 Organization Chart	Attach	View/Delete	Attach with Additional Date Details		
8 IRS 990	Attach	View/Delete	Attach with Additional Date Details		
9 Financial Statement/Audit	Attach	View/Delete	Attach with Additional Date Details		
10 CHAR500 or CHAR410	Attach	View/Delete	Attach with Additional Date Details		

Comments [REDACTED]

Step	Action
36.	Note: Not for Profit Organizations must upload IRS 990 information. To do this, use the Attach with Additional Date Details link.

Prequalification Application

Organizations must upload documents via "Attach" or "Attach with Additional Details" link below, depending on the specific document, which will be evaluated as part of the prequalification process. Documents must be in PDF format and under 20MB in size.

Supplier ID 1000051400

Supplier Name [REDACTED]

[Save For Later](#)

Attachments

Required Documents	Attach	View/Delete	Attach with Additional Date Details	Date Attached/Uploaded	Attached/Uploaded By
1 Certificate of Incorporation or Equivalent Document	Attach	View/Delete	Attach with Additional Date Details		
2 Certificate of Assumed Name or DBA, if applicable	Attach	View/Delete	Attach with Additional Date Details		
3 IRS 501(c) Determination Letter	Attach	View/Delete	Attach with Additional Date Details		
4 Board of Directors Profile	Attach	View/Delete	Attach with Additional Date Details		
5 Senior Leadership Resumes	Attach	View/Delete	Attach with Additional Date Details		
6 Corporate Bylaws	Attach	View/Delete	Attach with Additional Date Details		
7 Organization Chart	Attach	View/Delete	Attach with Additional Date Details		
8 IRS 990	Attach	View/Delete	Attach with Additional Date Details		
9 Financial Statement/Audit	Attach	View/Delete	Attach with Additional Date Details		
10 CHAR500 or CHAR410	Attach	View/Delete	Attach with Additional Date Details		

Comments [REDACTED]

SFS Handbook: Grantee Processing in SFS

Step	Action
37.	Click the Attach with Additional Date Details link.

Attach with Additional Date Details

IRS990 General Instructions

- Nonprofits must upload their most recent IRS990. If an organization has yet to file its initial IRS990 it should upload a statement detailing the date it was established and the tax year to be covered by the first filing.
- Enter the Tax Year Begin and End dates and the Date Next 990 Due Field will automatically populate.
- Nonprofits that are exempt from filing an annual IRS990 should upload proof of exemption and enter the Begin and End date of their current tax year. Prequalification Specialists will evaluate the documentation and set the Exempt flag accordingly.

CHAR500 or CHAR410 General Instructions

- Nonprofits must upload their most recent Annual Filing for Charitable Organizations (CHAR500) or Documentation of Exemption from the NYS Charities Bureau. If an Organization has not filed its first CHAR500, it should upload the Registration Statement for Charitable Organizations (CHAR410).
- Enter the Tax Year Begin and End dates and the Date Next Filing Due field will automatically populate.
- Nonprofits that are exempt from filing should upload proof of exemption and enter the Begin and End date of their current tax year.
- Prequalification Specialists will evaluate the documentation and set the Exempt flag accordingly.

Audit/Review & Findings General Instructions

- Nonprofits must upload their most recent CPA review, Independent Audit, or A133 Audit and any material findings. If an organization does not have any of these documents, it should upload a copy of the current and prior years budget.
- Enter the Tax Year Begin and End dates for the period covered by the most recent audit and the Date Next Due field automatically populate.

Clicking the following buttons on the top of the page will cause the listed actions:

- Cancel: Allows you to leave the page and if you attempted to make edits they are not saved
- Done: Allows you to leave the page and edits are saved
- X: Closes out the page without saving changes

After clicking the "Add Attachment" button, please click the "My Device" icon to select a file, or drag-and-drop a file into the box at the bottom of the page

View	Application ID	Version Number	SetID	Supplier ID
View				

Add Attachment

Step	Action
38.	Review the instructions for Upload as they apply to your Organization Type and then use the Add Attachment button to add the relevant documentation.
	Note: All attachments must be in PDF format. Uploading any other document types will result in automatic deletion by the system.

Attach with Additional Date Details

IRS990 General Instructions

- Nonprofits must upload their most recent IRS990. If an organization has yet to file its initial IRS990 it should upload a statement detailing the date it was established and the tax year to be covered by the first filing.
- Enter the Tax Year Begin and End dates and the Date Next 990 Due Field will automatically populate.
- Nonprofits that are exempt from filing an annual IRS990 should upload proof of exemption and enter the Begin and End date of their current tax year. Prequalification Specialists will evaluate the documentation and set the Exempt flag accordingly.

CHAR500 or CHAR410 General Instructions

- Nonprofits must upload their most recent Annual Filing for Charitable Organizations (CHAR500) or Documentation of Exemption from the NYS Charities Bureau. If an Organization has not filed its first CHAR500, it should upload the Registration Statement for Charitable Organizations (CHAR410).
- Enter the Tax Year Begin and End dates and the Date Next Filing Due field will automatically populate.
- Nonprofits that are exempt from filing should upload proof of exemption and enter the Begin and End date of their current tax year.
- Prequalification Specialists will evaluate the documentation and set the Exempt flag accordingly.

Audit/Review & Findings General Instructions

- Nonprofits must upload their most recent CPA review, Independent Audit, or A133 Audit and any material findings. If an organization does not have any of these documents, it should upload a copy of the current and prior years budget.
- Enter the Tax Year Begin and End dates for the period covered by the most recent audit and the Date Next Due field automatically populate.

Clicking the following buttons on the top of the page will cause the listed actions:

- Cancel: Allows you to leave the page and if you attempted to make edits they are not saved
- Done: Allows you to leave the page and edits are saved
- X: Closes out the page without saving changes

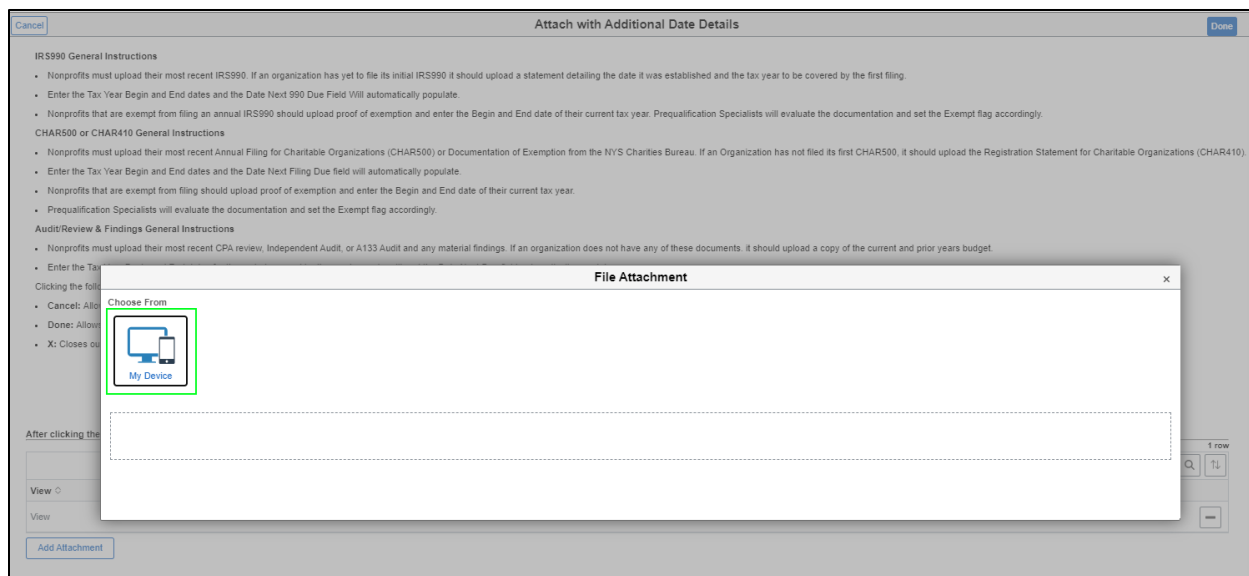
After clicking the "Add Attachment" button, please click the "My Device" icon to select a file, or drag-and-drop a file into the box at the bottom of the page

View	Application ID	Version Number	SetID	Supplier ID
View				

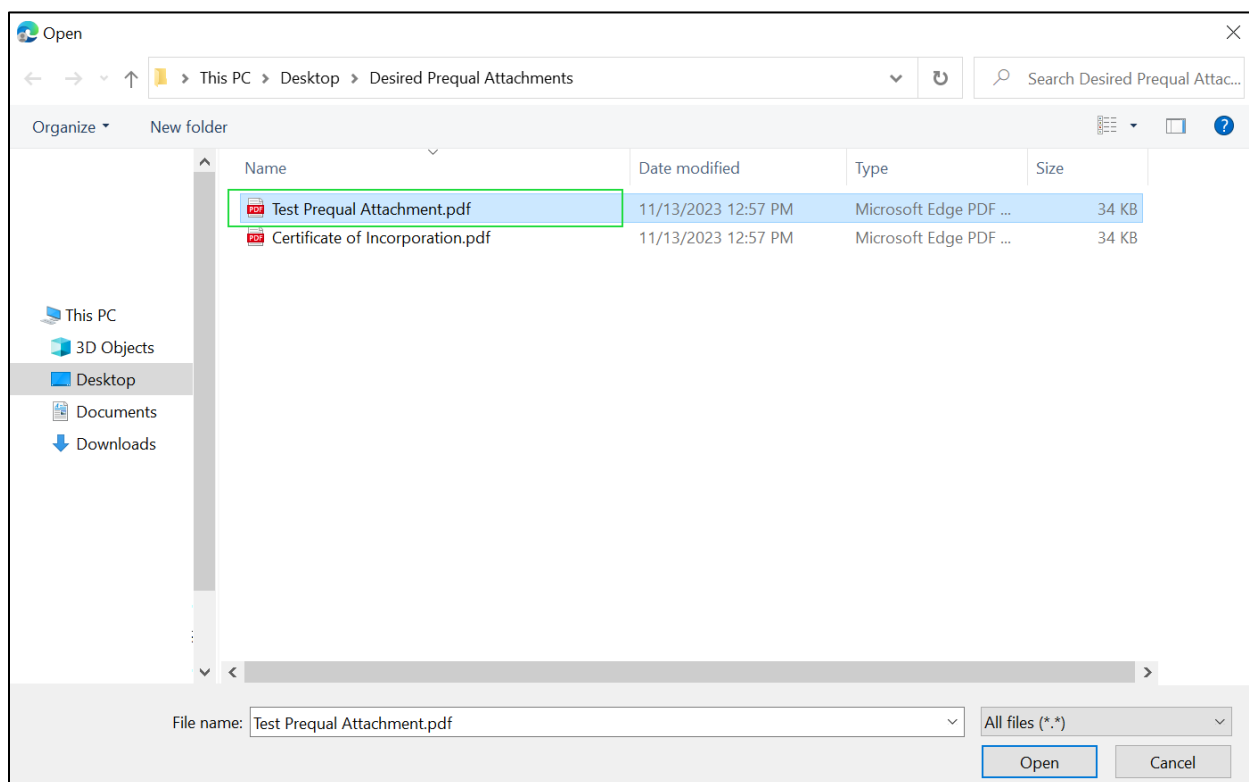
Add Attachment

Step	Action
39.	Click the Add Attachment button.

SFS Handbook: Grantee Processing in SFS

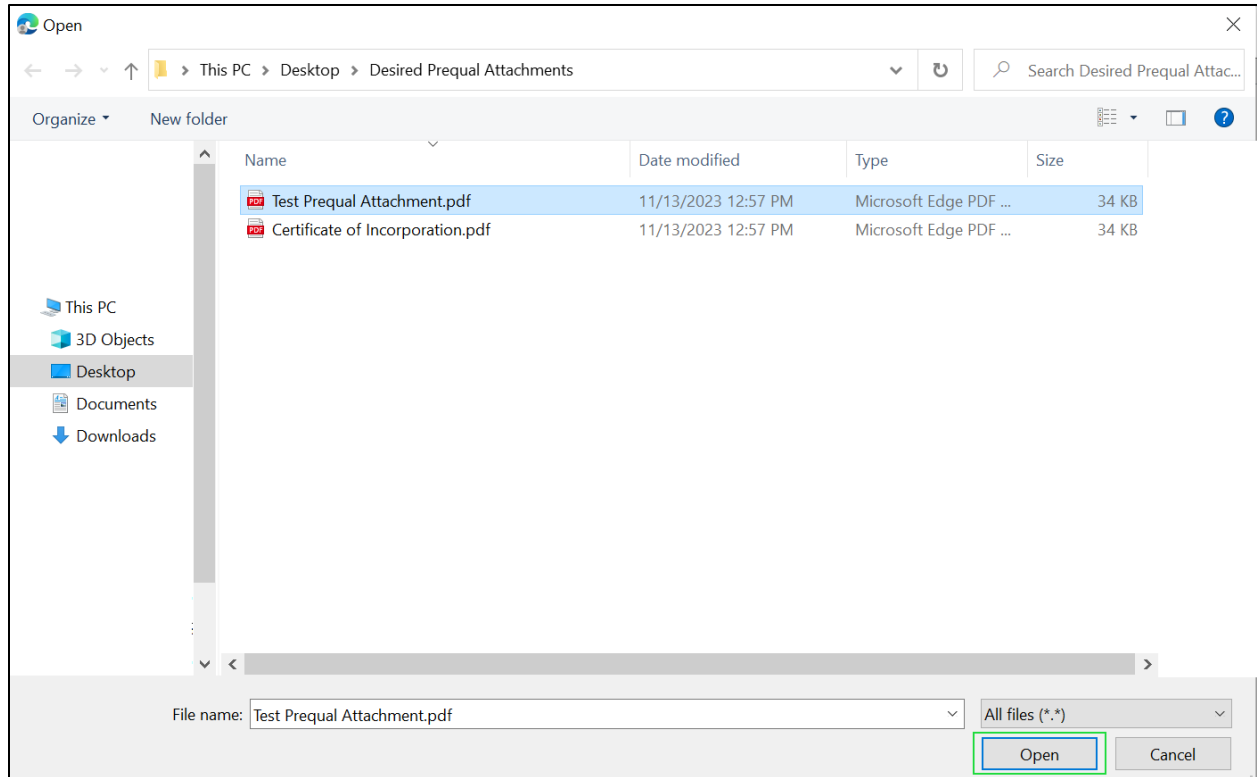


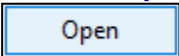
Step	Action
40.	Click the My Device button.

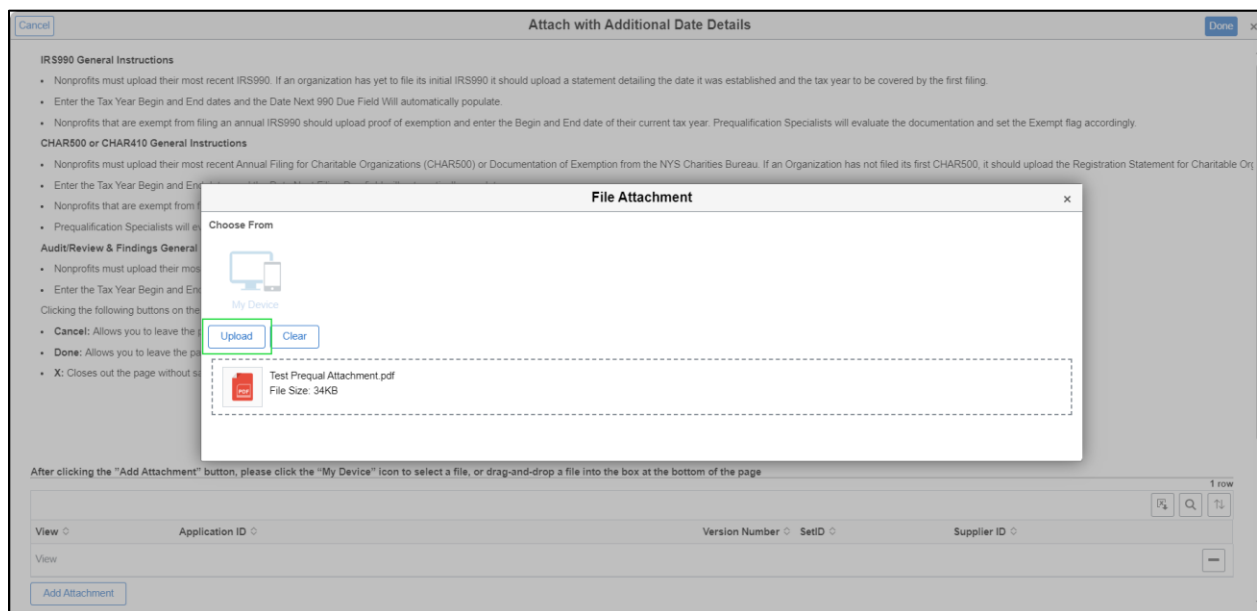


Step	Action
41.	Navigate to the directory location and select the applicable document for attachment.

SFS Handbook: Grantee Processing in SFS

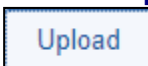


Step	Action
42.	Click the Open button. 



SFS Handbook: Grantee Processing in SFS

Step	Action
43.	Click the Upload button.



Attach with Additional Date Details

IRS990 General Instructions

- Nonprofits must upload their most recent IRS990. If an organization has yet to file its initial IRS990 it should upload a statement detailing the date it was established and the tax year to be covered by the first filing.
- Enter the Tax Year Begin and End dates and the Date Next 990 Due Field will automatically populate.
- Nonprofits that are exempt from filing an annual IRS990 should upload proof of exemption and enter the Begin and End date of their current tax year. Prequalification Specialists will evaluate the documentation and set the Exempt flag accordingly.

CHAR500 or CHAR410 General Instructions

- Nonprofits must upload their most recent Annual Filing for Charitable Organizations (CHAR500) or Documentation of Exemption from the NYS Charities Bureau. If an Organization has not filed its first CHAR500, it should upload the Registration Statement for Charitable Organizations.
- Enter the Tax Year Begin and End dates and the Date Next 500 Due Field will automatically populate.
- Nonprofits that are exempt from filing an annual CHAR500 should upload proof of exemption and enter the Begin and End date of their current tax year. Prequalification Specialists will evaluate the documentation and set the Exempt flag accordingly.

Audit/Review & Findings General Instructions

- Nonprofits must upload their most recent Audit/Review & Findings report.
- Enter the Tax Year Begin and End dates and the Date Next Audit/Review & Findings Due Field will automatically populate.

Clicking the following buttons on the top of the page will cause the listed actions:

- Cancel:** Allows you to leave the page and if you attempted to make edits they are not saved
- Done:** Allows you to leave the page and edits are saved
- X:** Closes out the page without saving changes

File Attachment

Choose From

My Device

Test Prequal Attachment.pdf
File Size: 34KB

Upload Complete

After clicking the "Add Attachment" button, please click the "My Device" icon to select a file, or drag-and-drop a file into the box at the bottom of the page

View	Application ID	Version Number	SetID	Supplier ID
View				

Add Attachment

Step	Action
44.	Click the Done button.



Attach with Additional Date Details

IRS990 General Instructions

- Nonprofits must upload their most recent IRS990. If an organization has yet to file its initial IRS990 it should upload a statement detailing the date it was established and the tax year to be covered by the first filing.
- Enter the Tax Year Begin and End dates and the Date Next 990 Due Field will automatically populate.
- Nonprofits that are exempt from filing an annual IRS990 should upload proof of exemption and enter the Begin and End date of their current tax year. Prequalification Specialists will evaluate the documentation and set the Exempt flag accordingly.

CHAR500 or CHAR410 General Instructions

- Nonprofits must upload their most recent Annual Filing for Charitable Organizations (CHAR500) or Documentation of Exemption from the NYS Charities Bureau. If an Organization has not filed its first CHAR500, it should upload the Registration Statement for Charitable Organizations.
- Enter the Tax Year Begin and End dates and the Date Next 500 Due Field will automatically populate.
- Nonprofits that are exempt from filing an annual CHAR500 should upload proof of exemption and enter the Begin and End date of their current tax year. Prequalification Specialists will evaluate the documentation and set the Exempt flag accordingly.

Audit/Review & Findings General Instructions

- Nonprofits must upload their most recent Audit/Review & Findings report.
- Enter the Tax Year Begin and End dates and the Date Next Audit/Review & Findings Due Field will automatically populate.

Clicking the following buttons on the top of the page will cause the listed actions:

- Cancel:** Allows you to leave the page and if you attempted to make edits they are not saved
- Done:** Allows you to leave the page and edits are saved
- X:** Closes out the page without saving changes

File Attachment

Choose From

My Device

Test Prequal Attachment.pdf
File Size: 34KB

Upload Complete

After clicking the "Add Attachment" button, please click the "My Device" icon to select a file, or drag-and-drop a file into the box at the bottom of the page

Test_Prequal_Attachment.pdf	Application ID	Version Number	SetID	Supplier ID
Test_Prequal_Attachment.pdf	000016146	1	SHARE	1000051400

Add Attachment

Date Next Due

Tax Year Begin Date 01/01/2023

State Adjusted Due Date

Tax Year End Date 12/31/2023

State Adjusted Due Date Reason

SFS Handbook: Grantee Processing in SFS

Step	Action
45.	Enter the applicable date (format MM/DD/YYYY) in the Tax Year Begin Date field or click the Calendar icon to select the date.

Cancel

Attach with Additional Date Details

Done

• Nonprofits must upload their most recent CP-A Review, Independent Audit, or A100 Audit and any material findings. If an organization does not have any of these documents, it should upload a copy of the current and prior years' budget.

- Enter the Tax Year Begin and End dates for the period covered by the most recent audit and the Date Next Due field automatically populate.

Clicking the following buttons on the top of the page will cause the listed actions:

- Cancel:** Allows you to leave the page and if you attempted to make edits they are not saved
- Done:** Allows you to leave the page and edits are saved
- X:** Closes out the page without saving changes

After clicking the "Add Attachment" button, please click the "My Device" icon to select a file, or drag-and-drop a file into the box at the bottom of the page

Test_Prequal_Attachment.pdf	Application ID	Version Number	SetID	Supplier ID
Test_Prequal_Attachment.pdf	000016146	1	SHARE	1000051400

Add Attachment

Date Next Due

Tax Year Begin Date 01/01/2023

State Adjusted Due Date

Tax Year End Date 12/31/2023

State Adjusted Due Date Reason

Step	Action
46.	Enter the applicable date (format MM/DD/YYYY) in the Tax Year End Date field or click the Calendar icon to select the date.

Cancel

Attach with Additional Date Details

Done

• Nonprofits must upload their most recent CP-A Review, Independent Audit, or A100 Audit and any material findings. If an organization does not have any of these documents, it should upload a copy of the current and prior years' budget.

- Enter the Tax Year Begin and End dates for the period covered by the most recent audit and the Date Next Due field automatically populate.

Clicking the following buttons on the top of the page will cause the listed actions:

- Cancel:** Allows you to leave the page and if you attempted to make edits they are not saved
- Done:** Allows you to leave the page and edits are saved
- X:** Closes out the page without saving changes

After clicking the "Add Attachment" button, please click the "My Device" icon to select a file, or drag-and-drop a file into the box at the bottom of the page

Test_Prequal_Attachment.pdf	Application ID	Version Number	SetID	Supplier ID
Test_Prequal_Attachment.pdf	000016146	1	SHARE	1000051400

Add Attachment

Date Next Due


Tax Year Begin Date 01/01/2023

State Adjusted Due Date

Tax Year End Date 12/31/2023

State Adjusted Due Date Reason

SFS Handbook: Grantee Processing in SFS

Step	Action
47.	Click the Done button. 

Prequalification Application

Organizations must upload documents via "Attach" or "Attach with Additional Details" link below, depending on the specific document, which will be evaluated as part of the prequalification process. Documents must be in PDF format and under 20MB in size.

Supplier ID: 1000051400

Supplier Name: [REDACTED]

[Save For Later](#)

Attachments

Required Documents	Attach	View/Delete	Attach with Additional Date Details	Date Attached/Uploaded	Attached/Uploaded By
1 Certificate of Incorporation or Equivalent Document	Attach	View/Delete	Attach with Additional Date Details		
2 Certificate of Assumed Name or DBA, if applicable	Attach	View/Delete	Attach with Additional Date Details		
3 IRS 501(c) Determination Letter	Attach	View/Delete	Attach with Additional Date Details		
4 Board of Directors Profile	Attach	View/Delete	Attach with Additional Date Details		
5 Senior Leadership Resumes	Attach	View/Delete	Attach with Additional Date Details		
6 Corporate Bylaws	Attach	View/Delete	Attach with Additional Date Details		
7 Organization Chart	Attach	View/Delete	Attach with Additional Date Details		
8 IRS 990	Attach	View/Delete	Attach with Additional Date Details		
9 Financial Statement/Audit	Attach	View/Delete	Attach with Additional Date Details		
10 CHAR500 or CHAR410	Attach	View/Delete	Attach with Additional Date Details		

Comments:

Step	Action
48.	Follow the same process to add attachments for any additional rows with the Attach with Additional Date Details link.

SFS Handbook: Grantee Processing in SFS

Prequalification Application

Organization Information Visited

Required Documents Visited

Contacts Not Started

Submit Not Started

Organizations must upload documents via "Attach" or "Attach with Additional Details" link below, depending on the specific document, which will be evaluated as part of the prequalification process. Documents must be in PDF format and under 20MB in size.

Supplier ID 1000051400

Supplier Name [REDACTED]

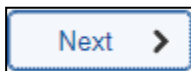
Save For Later

Attachments 10 rows

Required Documents	Attach	View/Delete	Attach with Additional Date Details	Date Attached/Uploaded	Attached/Uploaded By
1 Certificate of Incorporation or Equivalent Document	Attach	View/Delete	Attach with Additional Date Details		
2 Certificate of Assumed Name or DBA, if applicable	Attach	View/Delete	Attach with Additional Date Details		
3 IRS 501(c) Determination Letter	Attach	View/Delete	Attach with Additional Date Details		
4 Board of Directors Profile	Attach	View/Delete	Attach with Additional Date Details		
5 Senior Leadership Resumes	Attach	View/Delete	Attach with Additional Date Details		
6 Corporate Bylaws	Attach	View/Delete	Attach with Additional Date Details		
7 Organization Chart	Attach	View/Delete	Attach with Additional Date Details		
8 IRS 990	Attach	View/Delete	Attach with Additional Date Details		
9 Financial Statement/Audit	Attach	View/Delete	Attach with Additional Date Details		
10 CHAR500 or CHAR410	Attach	View/Delete	Attach with Additional Date Details		

Comments

Step	Action
49.	Click the Next button.



Prequalification Application

Organization Information Visited

Required Documents Visited

Contacts Visited

Submit Not Started

Identify the contact information for your organization.

Supplier ID 1000051400


Save For Later

1 row

SetID	Supplier ID	Contact Name	Telephone	Contact Type	Email ID
1	SHARE	1000051400	--		

Add Contacts

SFS Handbook: Grantee Processing in SFS

Step	Action
50.	<p>Click the Add Contacts button to add a contact person from your organization who should receive email notifications regarding the prequalification application and who the agency can contact if they have questions about the prequalification application.</p> <p></p> <p>Note: There will be system email notifications to the grantee contact(s) when their prequalification application is Submitted, Approved, Requested for More Information, Expired, or Due to Expire.</p>

Cancel

Add New Contact

Done x

Contact Information

Description

* First Name

* Last Name

Title

*Email Id

*Telephone

(Enter 10 digit ###-###-#### Phone #)

Fax Number

Contact Type

Clicking the following buttons on the top of the page will cause the listed actions:

- **Cancel:** Allows you to leave the page and if you attempted to make edits they are not saved
- **Done:** Allows you to leave the page and edits are saved
- **X:** Closes out the page without saving changes

Step	Action
51.	<p>Enter the applicable value in the Description field.</p> <p>This can be a description of the contact, such as Prequal Contact. If your organization will have multiple contacts, you want to consider Primary Prequal Contact or Secondary Prequal Contact.</p>

SFS Handbook: Grantee Processing in SFS

CancelAdd New ContactDone ×

Contact Information

Description

Prequal Contact

* First Name

John

* Last Name

Doe

Title

*Email Id

John.Doe@123.org

*Telephone

518-555-1212

(Enter 10 digit ### ### Phone #)

Fax Number

Contact Type

Clicking the following buttons on the top of the page will cause the listed actions:

- **Cancel:** Allows you to leave the page and if you attempted to make edits they are not saved
- **Done:** Allows you to leave the page and edits are saved
- **X:** Closes out the page without saving changes

Step	Action
52.	Enter the applicable value in the First Name field.
53.	Enter the applicable value in the Last Name field.
54.	Enter the applicable value in the Email Id field.
55.	Enter the applicable value in the Telephone field.

CancelAdd New ContactDone ×

Contact Information

Description

Prequal Contact

* First Name

John

* Last Name

Doe

Title

*Email Id

John.Doe@123.org

*Telephone

518-555-1212

(Enter 10 digit ### ### Phone #)

Fax Number

Contact Type

Clicking the following buttons on the top of the page will cause the listed actions:

- **Cancel:** Allows you to leave the page and if you attempted to make edits they are not saved
- **Done:** Allows you to leave the page and edits are saved
- **X:** Closes out the page without saving changes

SFS Handbook: Grantee Processing in SFS

Step	Action
56.	The Title , Fax Number , and Contact Type fields are optional, and can be populated or left blank.

Cancel

Add New Contact

Done X

Contact Information

Description

* First Name

* Last Name

Title

*Email Id

*Telephone
(Enter 10 digit ###-###-#### Phone #)

Fax Number

Contact Type

Clicking the following buttons on the top of the page will cause the listed actions:

- Cancel:** Allows you to leave the page and if you attempted to make edits they are not saved
- Done:** Allows you to leave the page and edits are saved
- X:** Closes out the page without saving changes

Step	Action
57.	Click the Done button.

Exit

Prequalification Application

< Previous

Next >

Organization Information

Visited

Required Documents

Visited

Contacts

Visited

Submit

Not Started

Identify the contact information for your organization.

Supplier ID 1000051400


Save For Later

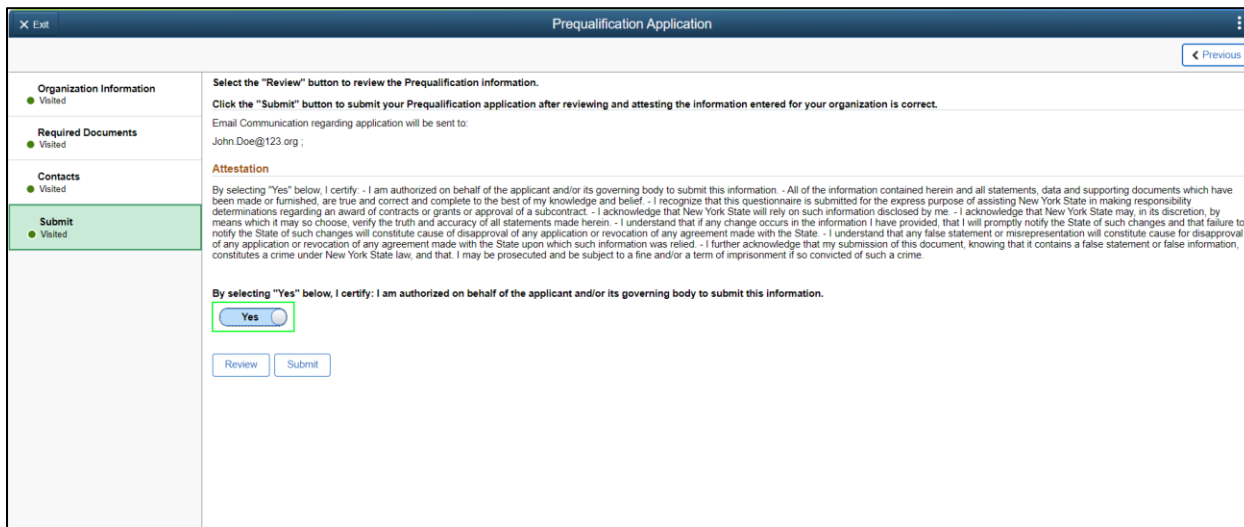
1 row

SetID	Supplier ID	Contact Name	Telephone	Contact Type	Email ID
1	SHARE	1000051400	John Doe	518-555-1212	John.Doe@123.org

Add Contacts

SFS Handbook: Grantee Processing in SFS

Step	Action
58.	<p>Multiple contacts can be added.</p> <p>If needed, click the Add Contacts button and follow steps 51-57 to add additional prequalification contacts from your organization.</p>
59.	<p>Click the Next button.</p> 



Prequalification Application

Select the "Review" button to review the Prequalification information.

Click the "Submit" button to submit your Prequalification application after reviewing and attesting the information entered for your organization is correct.

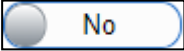
Email Communication regarding application will be sent to:
John.Doe@123.org ;

Attestation

By selecting "Yes" below, I certify: - I am authorized on behalf of the applicant and/or its governing body to submit this information. - All of the information contained herein and all statements, data and supporting documents which have been made or furnished, are true and correct and complete to the best of my knowledge and belief. - I recognize that this questionnaire is submitted for the express purpose of assisting New York State in making responsibility determinations regarding an award of contracts or grants or approval of a subcontract. - I acknowledge that New York State will rely on such information disclosed by me. - I acknowledge that New York State may, in its discretion, by means which it may so choose, verify the truth and accuracy of all statements made herein. - I understand that if any change occurs in the information I have provided, that I will promptly notify the State of such changes and that failure to notify the State of such changes will constitute cause of disapproval of any application or revocation of any agreement made with the State. - I understand that any false statement or misrepresentation will constitute cause for disapproval of any application or revocation of any agreement made with the State upon which such information was relied. - I further acknowledge that my submission of this document, knowing that it contains a false statement or false information, constitutes a crime under New York State law, and that, I may be prosecuted and be subject to a fine and/or a term of imprisonment if so convicted of such a crime.

By selecting "Yes" below, I certify: I am authorized on behalf of the applicant and/or its governing body to submit this information.

☒ Yes


Step	Action
60.	<p>On the Submit page, you certify that you are authorized to submit the information on the prequalification application and submit the prequalification application for agency review. You also have the option to review the information that you entered on the application, prior to submitting.</p> <p>To certify, click the Attestation toggle option to Yes.</p>  <p>Note: If you made additional changes to the application after clicking Yes, then you will need to reset the application before submitting by toggling back to No and then back to Yes.</p>

SFS Handbook: Grantee Processing in SFS

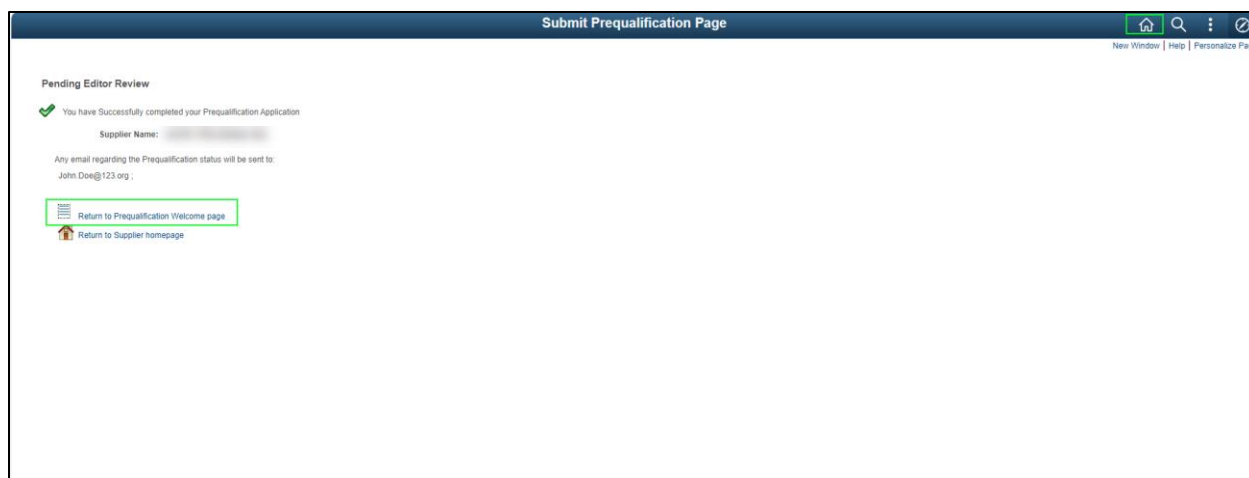
The screenshot shows the 'Prequalification Application' window. On the left sidebar, the 'Submit' button is highlighted with a green border. The main content area contains instructions to review the information and submit the application. The 'Attestation' section is visible, with a 'Yes' button highlighted in a green box. The 'Review' and 'Submit' buttons are at the bottom.

Step	Action
61.	If you are interested in reviewing all the information that you entered on the application, before you submit, click the Review button. In this example, we will not click the review button. Note: This is an optional step.
62.	Note: If you need to update information entered on the previous sections, select the applicable section from the list on the left side of the page and make the update(s).

The screenshot shows the 'Prequalification Application' window. The 'Submit' button in the main content area is highlighted with a green border. The left sidebar shows the 'Submit' button as 'Visited'. The 'Attestation' section is visible, with a 'Yes' button highlighted in a green box. The 'Review' and 'Submit' buttons are at the bottom.

Step	Action
63.	To submit the application for agency review, click the Submit button. 

SFS Handbook: Grantee Processing in SFS



Step	Action
64.	The application is routed for review to the agency you selected in the State Agency field, on the Organization Information section. Note: There will be system email notifications to the contact(s) listed in the Contacts section when the prequalification application is Submitted, Approved by the agency, or returned by the agency for more information.
65.	To return to the Prequalification Welcome page, click the Return to Prequalification Welcome page link or click the Home icon in the upper right corner of the page to return to the SFS Vendor Portal homepage.
66.	You have successfully completed the Enter and Submit a Prequalification Application topic.

Responding to Bid Events (Grant Opportunities)

Lesson Description:

This lesson provides the knowledge and skills to respond to Bid Events. Bid Events are grant opportunities that allow bidders to submit a bid response in order to apply for a funding award.

As part of a bid response, bidders provide responses to questions, attach documents, and provide other required, relevant information.

Lesson Objectives:

In this lesson, you will learn how to:

- Respond to Bid Event Expenditure Budget Types
- Respond to Bid Event Performance Budget Types
- Respond to Bid Event Capital Budget Types
- Using the Match Worksheet for a Bid Response

Respond to Bid Event Expenditure Budget Types

SFS Handbook: Grantee Processing in SFS

Topic Description:

This topic provides the knowledge and skills to respond to Bid Event Expenditure Budget Types. Budget types dictate the grant opportunity attributes available for each section of a period budget. Expenditure budget types allow grantees to record projected costs on a bid event and on a grant contract.

Topic Objectives:

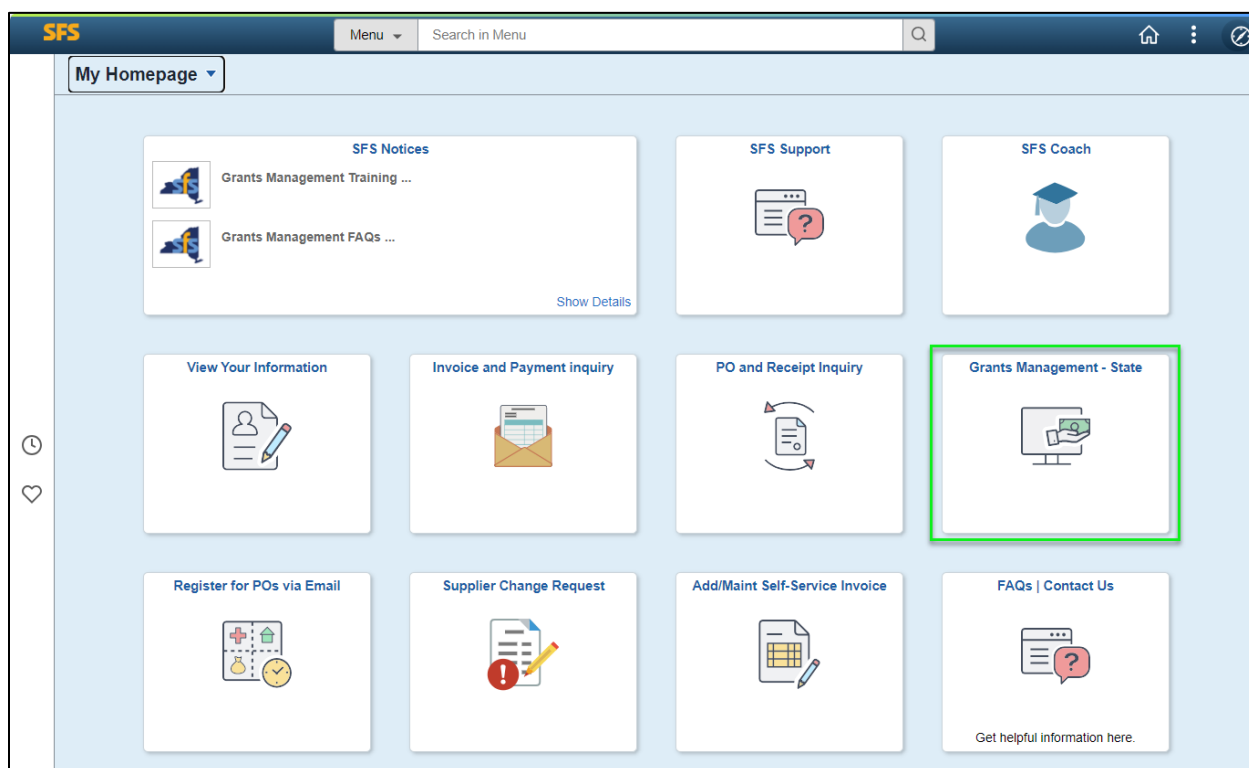
In this topic, you will learn:

- How to respond to Bid Event Expenditure Budget Types

Procedure


Scenario: You will log in to the SFS Vendor Portal, search for an available bid event (grant opportunity) and respond to the agency questions. You will also enter your budget, work plan information, and your bid price before submitting to the agency for review.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.



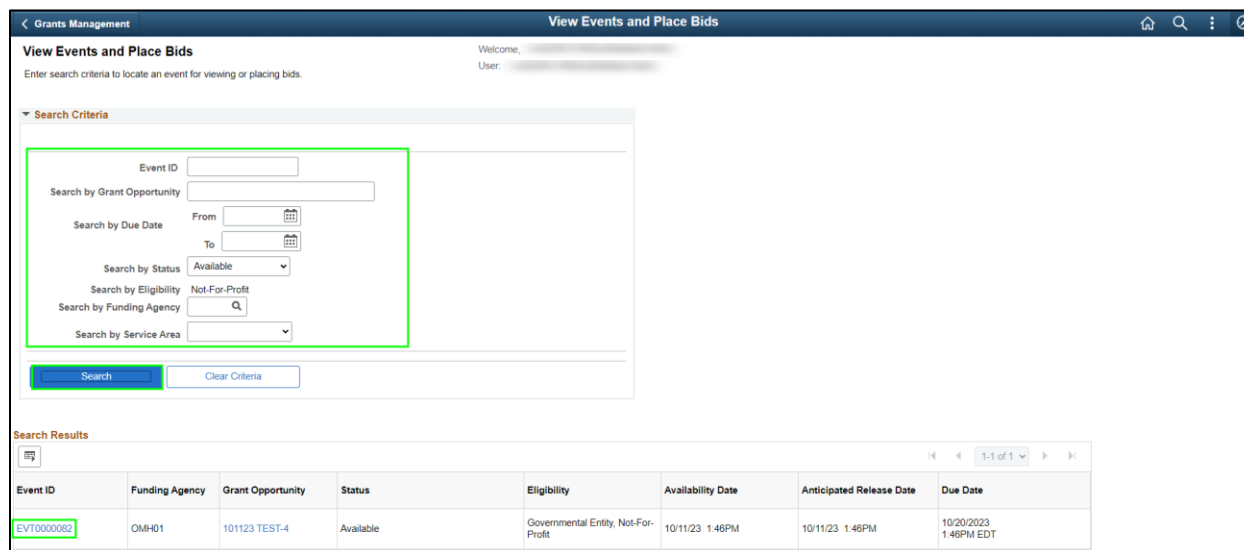
Step	Action
1.	<p>Preferred Navigation: Click the Grant Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > Manage Events and Place Bids > View Events and Place Bids</p>

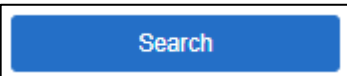
SFS Handbook: Grantee Processing in SFS

Step	Action
	 <p>Note: You must log in to the SFS Vendor Portal to respond to a bid event.</p>



Step	Action
2.	Click the Bid Event Search tile.



Step	Action
3.	Enter the applicable search criteria in the Search Criteria fields. In this example, we will select the Search by Status field drop-down list and click Available from the list.
4.	Click the Search button. 

SFS Handbook: Grantee Processing in SFS

Step	Action
5.	<p>Note: A list of Event IDs will populate based on the search criteria entered.</p> <p>Click an Event ID link to initiate a bid response.</p>

The screenshot shows the 'Event Details' page for event 101123 TEST-4. The 'Bid on Event' button is highlighted with a green box. The page includes a header with navigation links, a welcome message, and a sidebar with 'Accept Invitation' and 'Bid on Event' buttons. The main content area displays event details such as Event ID, Event Name, Event Format/Type, Event Round, Event Version, Event Start Date, and Event End Date. It also includes a description field, contact information, and payment terms.

Step	Action
6.	<p>Click the Bid on Event button.</p> <p>Bid on Event</p>

The screenshot shows the 'Event Details' page for event 101123 TEST-4. The 'Additional Bid Info' section is highlighted with a green box. This section includes fields for Bid ID, Bid Date, Bid Currency, Event Start Date, Event End Date, Estimated Award Date, and Anticipated Contract Date. The 'Bid on Event' button is also visible. The page includes a header with navigation links, a welcome message, and a sidebar with 'Submit Bid', 'Save for Later', 'Cancel', and 'Validate Entries' buttons. The main content area displays event details such as Event ID, Event Name, Event Format/Type, Event Round, Event Version, Event Start Date, and Event End Date. It also includes a description field, contact information, and payment terms.

SFS Handbook: Grantee Processing in SFS

Step	Action
7.	Review the Event Start , Event End Date , Estimated Award Date , Anticipated Contract Date fields.
8.	Click the Additional Bid Info link.

Additional Bid Response fields

Additional Bid Response Info

Organization Type	Not-For-Profit	<input type="checkbox"/> Letter of Intent
Taxpayer Identification Number		Questions & Answers Post Type
Bidders Conference Application Workshop		Provide a Link
		Questions & Answers Link
Contract Type	Fixed	Questions and Answers Upload
Length		Questions and Answers Narrative
Narrative	N/A	Q&A

Step	Action
9.	Review the Additional Bid Info .
	Click the OK button to return to the Event Details page.

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event: 1
Lines Responded To: 0
Your Total Line Pricing: 0.0000 USD

[Hide Line Detail](#)

★ Bid Required 🗨 Line Comments/Files

Lines

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	No Bid	Your Total Bid Price		
1	1		LINE 1	EA	<input type="text"/>	<input type="checkbox"/>		Bid	🗨

[Event Comments and Attachments](#)

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

[Return to Event Search](#)

SFS Handbook: Grantee Processing in SFS

Step	Action
10.	Select the Events Comments and Attachments link, located at the bottom of the page, to view any instructions, attachments and/or comments. You may need to scroll to see this link.

Event Comments and Attachments

Business Unit OMH01

Event ID EVT0000082

Event Round: 1

Event Version: 1

Help

Attachments

View Event Attachments ?

Attached File

Attachment Description

Event RFx Doc

Upload

View

Upload

View

Add New Attachments ?

Attached File

Attachment Description

Upload

View

Instructions_document.pdf

Upload

View

Add New Attachments

Delete

Reporting_Template.pdf

Upload

View

Add New Attachments

Delete

Comments

Add New Comments ?

Please review attached instructions before responding to bid event.

OK

Cancel

Step	Action
11.	Click the OK button after viewing the instructions, attachments, and comments.

SFS Handbook: Grantee Processing in SFS

Search Event Details **Event Details**

Event Name: 101123 TEST-4

Event ID: OMH01-EVT0000062

Event Format/Type: Sell Event RFX

Event Round: 1

Event Version: 1

Event Start Date: 10/11/2023 1:46PM EDT

Event End Date: 10/20/2023 01:46 PM EDT

Processing Status: Bid Event Published

Additional Bid Info

Bidding Instructions

Bid ID: New

Bid Date:

Bid Currency: USD US Dollar

Estimated Award Date

Anticipated Contract Date

Hide Additional Event Info

Description:

GRANTS

Contact

Phone

Email: test123@sfs.ny.gov

Online Discussion

Payment Terms

Billing Location: Office of Mental Health

Event Currency: Dollar

Conversion Rate: 1.00000000

Edits to Submitted Bids: Not Allowed

Multiple Bids: Allowed

Step 1: Answer General Event Questions

The event administrator requests your response to questions not specific to any specific item.

General Event Questions: 1

Required Questions: 1

Questions Responded To: 0

DUNS Number

Organization Website

Bidder Contact Information

Name

Telephone

Email

User Name: Child Care Solutions

Site/Project Address

Step	Action
12.	Use the scrollbar to navigate to the Step 1: Answer General Event Questions section.
13.	If applicable, enter a DUNS Number in the DUNS Number field. This field is optional and not required.
14.	If applicable, enter your Organization Website in the Organization Website field. This field is optional and not required.
15.	<p>Under the Bidder Contact Information, enter the following information:</p> <ul style="list-style-type: none"> Name Telephone Email <p>Note: The contact listed should be the person/people within the organization who can be contacted with questions about the bid response.</p>
16.	Click the Site/Project Address link.

SFS Handbook: Grantee Processing in SFS

Bid Response address fields

×

Help

Site/Project Address

Q

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1 of 1

▶

▶

|

View All

+

-

Address Line 1

10 Tester Lane

Address Line 2

City

Albany

Postal Code

12222

State

NY

OK

Cancel

Step	Action
17.	<p>Enter Address Details, including the following information:</p> <ul style="list-style-type: none">• Address Line 1• Address Line 2 (if applicable)• City• Postal Code• State <p>Note: The Site/Project Address is where the grant will be used, or funds will be spent.</p>
18.	When you have finished entering address details, click the OK button.

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Event Questions

★ Bid Required 🏆 Ideal Response Required

General Questions 1 of 2

★
Applicant must be a 501c3 organization to apply

Response: Yes Weighting:

★
Describe why your organization is qualified to implement the proposed program model outlined in Section III Program Model Description. Include both quantitative and qualitative evidence to address this question and experience with engaging with PWD and priority population(s).

Response: My organization is qualified because...

Step	Action
19.	<p>Review and respond to Event Questions. Those that are flagged as Required (*) must be responded to in order to submit a bid response.</p> <p>Note: The ability to add a Comment/Attachment will vary based on the question.</p>

Event Details

Welcome, User

Message not found

[Submit Bid](#) [Save for Later](#) [Cancel](#) [Validate Entries](#)

Event Name: 101123 TEST-4 Bidding Instructions

Event ID: OMH01-EVT0000082 Additional Bid Info Bid ID: 1

Event Format/Type: Sell Event RFx Bid Date

Event Round: 1 Bid Currency: USD US Dollar

Event Version: 1

Event Start Date: 10/11/2023 1:46PM EDT Estimated Award Date

Event End Date: 10/28/2023 01:46 PM EDT Anticipated Contract Date

Processing Status: Bid Event Published

[Hide Additional Event Info](#)

Description: GRANTS

Contact: Phone, Email: test123@sfs.ny.gov, Online Discussion

Payment Terms: Billing Location: Office of Mental Health, Event Currency: Dollar, Conversion Rate: 1.00000000, Edits to Submitted Bids: Not Allowed, Multiple Bids: Allowed

Step	Action
20.	Click the Save for Later button.

SFS Handbook: Grantee Processing in SFS

The bid is not complete. (18058,342)

If you would like to save your bid for submittal at a later time, select "OK". If not, select "Cancel" to return to the bid response pages so that you can continue editing your bid.

OK

Cancel

Step	Action
21.	In the resulting popup, click the OK button to save your progress.

Step	Action
22.	Scroll to the bottom of the page. Under the Lines section, click the numerical value link under the Period column to access budget and work plan information.

SFS Handbook: Grantee Processing in SFS

Step	Action
23.	Click the Budget properties link.

Event ID

EVT0000082

Max Award Amount

500000.000

Bid Event Period

1

Period From Date

10/01/2023

Bidder/Vendor ID

1000015277

Period To Date

09/30/2024

Budget Type

EXPENDITURE

Budget Properties

Apply Match

Allowed at Category I

Calculate Match

Grant Fund

☒ Include Match Worksheet
 [Match Worksheet](#)

Budget Category Properties

1-5 of 10

View All

	Budget Category	Available in Grant	Use Match	Match Percentage	Use Other	Overage on Claims	Overage Percentage
1	SALARY	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	
2	FRINGE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	
3	CONTRACTUAL	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	
4	TRAVEL	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	
5	EQUIPMENT	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	











Step	Action
24.	Review the Budget Header Information .
25.	<p>Review Budget Category Property section (including Narrative), noting which rows have Available in Grant checked.</p> <p>Note: This section was completed by the agency to help the grantee understand which Budget Category(s) require a response. Grantees will need to scroll down to view the sections they are responsible for updating.</p>

SFS Handbook: Grantee Processing in SFS

Narrative

Period Budget Summary

1-10 of 10 [View All](#)

	Budget Category	Grant Funds Requested	Match Funds	Match % Calculated	Match % Required	Other Funds	Total	Category Details
1	SALARY	0.00	0.00	0	0	0.00	0.00	
2	FRINGE	0.00	0.00	0	0	0.00	0.00	
3	CONTRACTUAL	0.00	0.00	0	0	0.00	0.00	
4	TRAVEL	0.00	0.00	0	0	0.00	0.00	
5	EQUIPMENT	0.00	0.00	0	0	0.00	0.00	
6	SPACE/PROPERTY RENT	0.00	0.00	0	0	0.00	0.00	
7	SPACE/PROPERTY OWN	0.00	0.00	0	0	0.00	0.00	
8	UTILITIES	0.00	0.00	0	0	0.00	0.00	
9	OPERATING EXPENSES	0.00	0.00	0	0	0.00	0.00	
10	OTHER	0.00	0.00	0	0	0.00	0.00	

Step	Action
26.	<p>Under the Period Budget Summary section, click on View All icon to show all budget categories. You may need to click the scrollbar to view this section of the page.</p> <p>In this example, we will enter budget information for the Salary and Fringe budget categories.</p>
27.	<p>Under the Period Budget Summary section, click on Category Details icon for the Salary budget category.</p> <div data-bbox="383 1190 464 1262" data-label="Image"> </div> <p>Note: Where the icon cannot be clicked, the agency has not checked the Available in Grant checkbox above.</p>

SFS Handbook: Grantee Processing in SFS

Category Details x

[Help](#)

Budget Type EXPENDITURE

Budget Category SALARY

Match % Required

Category Details

1-1 of 1

[View All](#)

	Grant Funds	Match Funds	Match %	Other funds	Total Funds	Position Title	Annual Salary I Position
1	<input style="width: 90%;" type="text"/>					<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>

Category Totals

Cumulative Grant Funds 0.00

Cumulative Match Funds 0.00

Cumulative Other Funds 0.00

Cumulative Category Details Totals 0.00



Narrative

OK

Cancel

Step	Action
28.	Enter the applicable value into the Grant Funds field. In this example, we will enter 10,000 into the Grant Funds field.
29.	Enter the applicable value into the Match Funds field. In this example, we will leave this field blank.
30.	Enter the applicable value into the Other Funds field. Note: This field may be greyed out if it was not selected on the bid event; if greyed out, move onto the next step.
31.	Enter the applicable value into the Position Title field. In this example, we will enter Narcan Trainer in the Position Title field. You may need to scroll to see this field.
32.	Enter the applicable value into the Annualized Salary per Position field.

SFS Handbook: Grantee Processing in SFS

Step	Action
	In this example, we will enter 50,000 in the Annualized Salary per Position field.
33.	Enter the applicable value into the STD Work Week (HRS) field. In this example, we will enter 40 in the STD Work Week (HRS) field.
34.	Enter the applicable value into % of Effort Funded field. In this example, we will enter 100 in the % of Effort Funded field.
35.	Enter the applicable value into the # of Months Funded field. In this example, we will enter 12 in the # of Months Funded field.
36.	Enter the applicable value into the Narrative field. Note: The narrative could be additional information for the agency or could be used to summarize the changes you made. In this example, we will not enter a narrative for the salary budget category.
37.	Click the OK button. 
38.	Under the Period Budget Summary section, click on Category Details icon for the Fringe budget category.
39.	Leave the Type/Description field blank.
40.	Enter the applicable value into the Grant Funds field. In this example, we will enter 10,000 in the Grant Funds field.
41.	Enter the applicable value into the Match Funds field. In this example, we will leave this field blank.
42.	Enter the applicable value into the Other Funds field. Note: This field may be greyed out if it was not selected on the bid event; if greyed out, move on to the next step.
43.	Enter the applicable value into the Narrative field. In this example, we will enter Fringe Rate at 20% in the Narrative field.
44.	Click the OK button. 

SFS Handbook: Grantee Processing in SFS

Budget Properties Header

5	EQUIPMENT	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	
---	-----------	--------------------------	--------------------------	---	--------------------------	--------------------------	--

Narrative

Period Budget Summary

Budget Category		Grant Funds Requested	Match Funds	Match % Calculated	Match % Required	Other Funds	Total	Category Details
1	SALARY	10000.00	0.00	0	0	0.00	10000.00	
2	FRINGE	10000.00	0.00	0	0	0.00	10000.00	
3	CONTRACTUAL	0.00	0.00	0	0	0.00	0.00	
4	TRAVEL	0.00	0.00	0	0	0.00	0.00	
5	EQUIPMENT	0.00	0.00	0	0	0.00	0.00	

Sub Totals

Grants Funds	20000.00	Match % Calc	0.00
Match Funds	0.00	Other Funds	0.00
Total	20000.00		

Back

Save

Step	Action
45.	Click the Save button.
46.	Click the Back button.

< Bid Search Screen
Create Bids
New Window | Help | Personalize Page

Business Unit: OIMH01
Event ID: EVT0000082
Bidder SetID: SHARE

Budget Type: EXPENDITURE
Funded Amount: 500000.000
Period: 1
Bidder ID: 1000015277

Bid Event Periods

Period: 1

Period From: 10/01/2023 Period To: 09/30/2024

☐ Budget Required [Budget properties](#)
☐ Work Plan Required [Work Plan Properties](#)

Bid Event Line# 1

<Return to Bid Response

Step	Action
47.	Click the Work Plan Properties link.

SFS Handbook: Grantee Processing in SFS

Work Plan Header

Event ID: EVT0000082 Business Unit: OMH01 WorkPlan ID: EVT0000082-R1V1P1-1000015277-169 Period From: 10/01/2023 Period To: 09/30/2024 Period: 1

Allow Bidder Defined Objective and Tasks: ☒

Maximum Number of:

- Objectives: 50
- Tasks: 100
- Performance Measures: 300

Project Summary

Help reduce drug deaths.

Step	Action
48.	Review the Work Plan Header information and verify the Allow Bidder Defined Objectives and Tasks is selected.
49.	Note: If the Allow Bidder Defined Objectives & Tasks box is checked and the Maximum Number of Objectives, Tasks, and Performance Measures have not already been entered, then you can add new objective, tasks, and performance measures if needed.
50.	Enter the applicable value into the Project Summary field if not already entered by the agency. In this example, we will enter Help reduce drug deaths in the Project Summary field.

Objectives >> Tasks >> Performance Measures

Display Type: All

1-4 of 4 View All

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
<input checked="" type="checkbox"/>	Objective	1	Objective 1	Objective 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Task	1.1	Task 1	task 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.1.1	PM 1	PM 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Objective	2	Increase the number of opioid related resources available to community members	Increase the number of opioid related resources available to community members	<input type="checkbox"/>	<input type="checkbox"/>

Back Save Refresh

Step	Action
51.	In this example, we will add additional rows in the Objectives >> Tasks >> Performance Measures section. Note: The First Objective with the underlying Task and Performance Measure in the list was entered by the agency.

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Step	Action
	Click on the Objective row to add additional objectives.
52.	Click the + Objective button.
53.	Enter the applicable information on the Objective row, in the Name field. On the Objective row, in this example we will enter Increase the number of opioid related resources available to community members in the Name field.
54.	Enter the applicable information on the Objective row, in the Description field. On the Objective row, in this example we will enter Increase the number of opioid related resources available to community members in the Description field.

Objectives >> Tasks >> Performance Measures ?

Objective Task Perf. Measure Display Type: All

1-5 of 5 View All

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
1 <input type="checkbox"/>	Objective	1	Objective 1	Objective 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2 <input type="checkbox"/>	Task	1.1	Task 1	task 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3 <input type="checkbox"/>	Performance Measure	1.1.1	PM 1	PM 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4 <input checked="" type="checkbox"/>	Objective	2	Increase the number of opioid related	Increase the number of opioid related	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5 <input type="checkbox"/>	Task	2.1	Distribute naran kits to trained	Distribute naran kits to trained	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Objective Task Perf. Measure Display Type: All

Back Save Refresh

Step	Action
55.	Select the Objective row where the task will be added.
56.	Click + Task button.
57.	Enter the applicable information on the Task row, in the Name field. On the Task row, in this example we will enter Distribute 74 naran kits to trained community members in the Name field.
58.	Enter the applicable information on the Task row, in the Description field. On the Task row, in this example we will enter Distribute 74 naran kits to trained community members in the Description field.

SFS Handbook: Grantee Processing in SFS

Objectives >> Tasks >> Performance Measures

Objective Task Perf. Measure Display Type: All

1-6 of 6 View All

Basic Info More Details

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
<input type="checkbox"/>	Objective	1	Objective 1	Objective 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.1	Task 1	task 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.1.1	PM 1	PM 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Objective	2	Increase the number of opioid related	Increase the number of opioid related	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Task	2.1	Distribute naran kits to trained	Distribute naran kits to trained	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	2.1.1	Number of kits distributed	Number of kits distributed	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Objective Task Perf. Measure Display Type: All

Back Save Refresh

Step	Action
59.	Select the Task row where the performance measure will be added.
60.	Click + Performance Measure button.
61.	<p>Enter the applicable information on the Performance Measure row, in the Name field.</p> <p>On Performance Measure row, in this example we will enter Number of kits distributed in the Name field.</p>
62.	<p>Enter the applicable information on the Performance Measure row, in the Description field.</p> <p>On Performance Measure row, in this example we will enter Number of kits distributed in the Description field.</p>

SFS Handbook: Grantee Processing in SFS

Objectives >> Tasks >> Performance Measures

Objective Task Perf. Measure Display Type: All

Basic Info More Details **II>**

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
<input type="checkbox"/>	Objective	1	Objective 1	Objective 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.1	Task 1	task 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.1.1	PM 1	PM 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Objective	2	Increase the number of opioid related	Increase the number of opioid related	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Task	2.1	Distribute narcain kits to trained	Distribute narcain kits to trained	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	2.1.1	Number of kits distributed	Number of kits distributed	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Objective Task Perf. Measure Display Type: All

Back Save Refresh

Step	Action
63.	Click the arrow to the right of the More Details tab to expand the view and see all fields.

Event Bid Period Create Bids

Paragraph A² A¹ A⁰ B I U S Display Type: All

ug deaths.

Performance Measures

Perf. Measure Display Type: All

	Sort Order	Name	Description	Required	Allowed to Sort	Allow Performance Measure	Perf Measure Response Type	Numeric (Target/Goal)
ive	1	Objective 1	Objective 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
	1.1	Task 1	task 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
formance Measure	1.1.1	PM 1	PM 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Numeric	100
ive	2	Increase the number of opioid related	Increase the number of opioid related	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
	2.1	Distribute narcain kits to trained	Distribute narcain kits to trained	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
formance Measure	2.1.1	Number of kits distributed	Number of kits distributed	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Numeric	100

Perf. Measure Display Type: All

Back Save Refresh

Step	Action
64.	Note: Available Performance Measure options are: <ul style="list-style-type: none"> Attachment Date Numeric Text/Comment

SFS Handbook: Grantee Processing in SFS

Step	Action
	<ul style="list-style-type: none"> Yes/No <p>In this example, on the Performance Measure row, we will select the Performance Measure Response Type drop-down list and select the Numeric option.</p>
65.	<p>Enter the applicable value into the Numeric (Target/Goal) field.</p> <p>In this example, we will enter 100 in the Numeric (Target/Goal) field.</p>
66.	Click the Save button.
67.	Click the Back button.

Step	Action
68.	Click the Return to Bid Response link.

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event: 1
Lines Responded To: 0
Your Total Line Pricing: 0.0000 USD

[Hide Line Detail](#)

★ Bid Required Line Comments/Files

Lines

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	No Bid	Your Total Bid Price	
1	1		LINE 1	EA	20000	<input type="checkbox"/>		Bid

[Event Comments and Attachments](#)

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

SFS Handbook: Grantee Processing in SFS

Step	Action
69.	Note: The amount entered in the Your Unit Bid Price field must equal the total Grant Funds Requested amount for the period, in order to submit the bid response. In this example, we will enter 20,000 in the Your Unit Bid Price field.
70.	When you are ready to submit your bid response, click the Submit Bid button.

Are you done making changes and would like to post this bid? (18058,398)

Warning: Response may NOT be edited after posting. If you are not planning to make anymore changes to this bid press "Yes", otherwise press "No" and choose "Save For Later".

Step	Action
71.	In the resulting popup, click the Yes button to confirm you would like to submit the bid.
72.	You have successfully completed the Respond to Bid Event Expenditure Budget Types topic.

Respond to Bid Event Performance Budget Types

Topic Description:

This topic provides the knowledge and skills to respond to a Bid Event Performance Budget Type. Budget types dictate the grant opportunity attributes available for each section of a period budget. Performance budget types allow grantees to add costs and deliverables/outcomes on the bid event and grant contract.

Topic Objectives:

In this topic, you will learn:

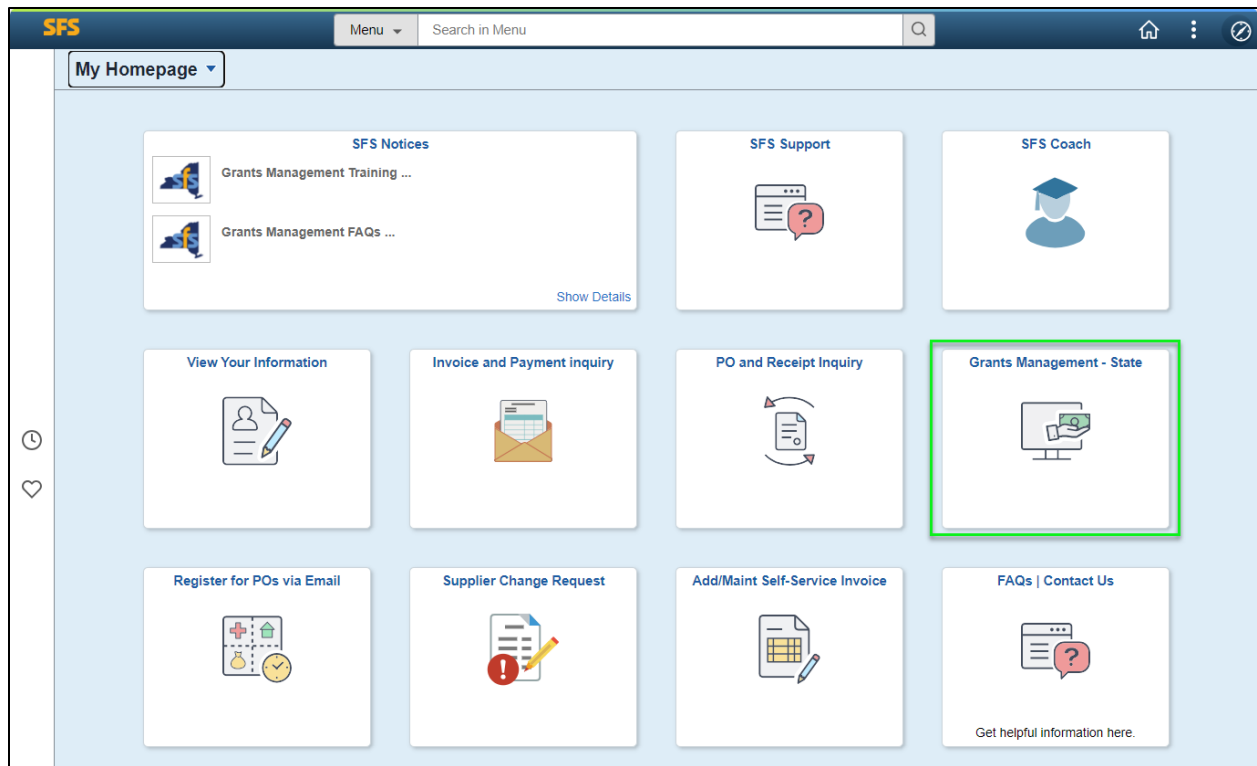
- How to respond to a Bid Event Performance Budget Types


Procedure

Scenario: You will log in to the SFS Vendor Portal, search for an available bid event (grant opportunity) and respond to the agency questions. You will also enter your budget, work plan information, and your bid price before submitting to the agency for review.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

SFS Handbook: Grantee Processing in SFS



Step	Action
1.	<p>Preferred Navigation: Click the Grant Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > Manage Events and Place Bids > View Events and Place Bids</p>  <p>Note: You must log in to the SFS Vendor Portal to respond to a bid event.</p>



Step	Action
2.	Click the Bid Event Search tile.

SFS Handbook: Grantee Processing in SFS

Grants Management View Events and Place Bids

Welcome, [User]

Enter search criteria to locate an event for viewing or placing bids.

Search Criteria

Event ID

Search by Grant Opportunity

Search by Due Date From To

Search by Status

Search by Eligibility

Search by Funding Agency

Search by Service Area

Search Results

Event ID	Funding Agency	Grant Opportunity	Status	Eligibility	Availability Date	Anticipated Release Date	Due Date
EVT0000082	OMH01	101123 TEST-4	Available	Governmental Entity, Not-For-Profit	10/11/23 1:46PM	10/11/23 1:46PM	10/20/2023 1:46PM EDT

Step	Action
3.	<p>Enter the applicable search criteria in the Search Criteria fields.</p> <p>In this example, select the Search by Status field drop-down list and click Available from the list.</p>
4.	<p>Click the Search button.</p> <div> <input type="button" value="Search"/> </div>
5.	<p>Note: A list of Event IDs will populate based on the search criteria entered.</p> <p>Click an Event ID link to initiate a bid response.</p> <p>In this example, we will click the Bid Event EVT0000082 link to initiate a bid response.</p>

SFS Handbook: Grantee Processing in SFS

The screenshot shows the 'Event Details' page for event 101123 TEST-4. The 'Bid on Event' button is highlighted with a green box. The page includes a header with 'Supplier Search Events' and 'Event Details', a welcome message, and a sidebar with 'Bidding Shortcuts'. The main content area displays event information such as Event ID, Event Name, Event Format/Type, Event Round, Event Version, Event Start Date, and Event End Date. It also includes a description field, contact information, and payment terms.

Step	Action
6.	Click the Bid on Event button.

The screenshot shows the 'Event Details' page for event 101123 TEST-4. The 'Additional Bid Info' section is highlighted with a green box. This section includes fields for Event Name, Event ID, Event Format/Type, Event Round, Event Version, Event Start Date, Event End Date, Processing Status, Bid ID, Bid Date, Bid Currency, Estimated Award Date, and Anticipated Contract Date. The page also includes a header with 'Search Event Details' and 'Event Details', a welcome message, and a sidebar with 'Bidding Instructions'. The main content area displays event information such as Event ID, Event Name, Event Format/Type, Event Round, Event Version, Event Start Date, and Event End Date. It also includes a description field, contact information, and payment terms.

Step	Action
7.	Review the Event Start , Event End Date , Estimated Award Date , Anticipated Contract Date fields.

SFS Handbook: Grantee Processing in SFS

Step	Action
8.	Click the Additional Bid Info link.

Additional Bid Response fields

Additional Bid Response Info

Organization Type	Not-For-Profit	<input type="checkbox"/> Letter of Intent
Taxpayer Identification Number	<div style="background-color: #ccc; width: 100px; height: 1.2em;"></div>	Questions & Answers Post Type
Bidders Conference Application	Workshop	Provide a Link
		Questions & Answers Link
Contract Type	Fixed	Questions and Answers Upload
Length		Questions and Answers Narrative
Narrative	<div style="border: 1px solid #ccc; padding: 2px;">N/A</div>	<div style="border: 1px solid #ccc; padding: 2px;">Q&A</div>

OK
Cancel

Step	Action
9.	<p>Review the Additional Bid Info.</p> <p>Click the OK button to return to the Event Details page.</p>

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event 1

Lines Responded To 0

Your Total Line Pricing 0.0000 USD

[Hide Line Detail](#)

★ Bid Required Line Comments/Files

Lines

1-1 of 1 View All

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	No Bid	Your Total Bid Price		
1	1		LINE 1	EA	<div style="border: 1px solid #ccc; width: 50px; height: 1.2em;"></div>	<input type="checkbox"/>		Bid	

Event Comments and Attachments

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

Submit Bid
Save for Later

Validate Entries

[Return to Event Search](#)

SFS Handbook: Grantee Processing in SFS

Step	Action
10.	Select the Events Comments and Attachments link, located at the bottom of the page, to view any instructions, attachments and/or comments. You may need to scroll to see this link.

Event Comments and Attachments

Business Unit OMH01

Event ID EVT0000082

Event Round: 1

Event Version: 1

Help

Attachments

View Event Attachments ?

Attached File

Attachment Description

Event RFx Doc

Upload

View

Upload

View

Add New Attachments ?

Attached File

Attachment Description

Upload

View

Instructions_document.pdf

Upload

View

Add New Attachments

Delete

Reporting_Template.pdf

Upload

View

Add New Attachments

Delete

Comments

Add New Comments ?

Please review attached instructions before responding to bid event.

OK

Cancel

Step	Action
11.	Click the OK button after viewing the instructions, attachments and comments.

SFS Handbook: Grantee Processing in SFS

Event Details

Event Name: 101123 TEST-4

Event ID: OMH01-EVT0000002

Event Format/Type: Sell Event

Event Round: 1

Event Version: 1

Event Start Date: 10/11/2023 1:46PM EDT

Event End Date: 10/20/2023 01:46 PM EDT

Processing Status: Bid Event Published

Additional Bid Info: Bid ID: New, Bid Date: , Bid Currency: USD, US Dollar

Bidding Instructions: Estimated Award Date, Anticipated Contract Date

Description: GRANTS

Contact: Phone, Email: test123@sfs.ny.gov

Payment Terms: Billing Location: Office of Mental Health, Event Currency: Dollar, Conversion Rate: 1.00000000, Edits to Submitted Bids: Not Allowed, Multiple Bids: Allowed

Step 1: Answer General Event Questions

The event administrator requests your response to questions not specific to any specific item.

General Event Questions: 1

Required Questions: 1

Questions Responded To: 0

DUNS Number: [Field]

Organization Website: [Field]

Bidder Contact Information

Name: [Field]

Telephone: [Field]

Email: [Field]

User Name: Child Care Solutions

Site/Project Address: [Field]

Step	Action
12.	Use the scrollbar to navigate to the Step 1: Answer General Event Questions section.
13.	If applicable, enter a DUNS Number in the DUNS Number field. This field is optional and not required.
14.	If applicable, enter your Organization Website in the Organization Website field. This field is optional and not required.
15.	<p>Under the Bidder Contact Information, enter the following information:</p> <ul style="list-style-type: none"> Name Telephone Email <p>Note: The contact listed should be the person/people within the NFP who can be contacted with questions about the bid response</p>
16.	Click the Site/Project Address link.

SFS Handbook: Grantee Processing in SFS

Bid Response address fields

×

Help

Site/Project Address

Q

|

◀

◀

1 of 1

▶

▶

|

View All

+

−

Address Line 1

10 Tester Lane

Address Line 2

City

Albany

Postal Code

12222

State

NY

OK

Cancel

Step	Action
17.	<p>Enter Address Details, including the following information:</p> <ul style="list-style-type: none">• Address Line 1• Address Line 2 (if applicable)• City• Postal Code• State <p>Note: The Site/Project Address is where the grant will be used, or funds will be spent.</p>
18.	When you have finished entering address details, click the OK button.

SFS Handbook: Grantee Processing in SFS

Search Event Details Event Details

Hide Event Questions

Event Questions

★ Bid Required ★ Ideal Response Required

General Questions 1 of 2

★ Applicant must be a 501c3 organization to apply

Response Yes Weighting

★ Describe why your organization is qualified to implement the proposed program model outlined in Section III Program Model Description. Include both quantitative and qualitative evidence to address this question and experience with engaging with PWD and priority population(s).

Response My organization is qualified because...

Step	Action
19.	<p>Review and respond to Event Questions. Those that are flagged as Required (*) must be responded to in order to submit a bid response.</p> <p>Note: The ability to add a Comment/Attachment will vary based on the question.</p>

Bid Menu Event Details

Welcome, User

New Window Help Personalize Page

Event Details

Message not found

Submit Bid Save for Later Cancel Validate Entries

Event Name 101123 TEST-4 Bidding Instructions

Event ID OMH01-EVT0000082 Additional Bid Info Bid ID 1

Event Format/Type Sell Event RFx Bid Date

Event Round 1 Bid Currency USD US Dollar

Event Version 1

Event Start Date 10/11/2023 1:46PM EDT

Event End Date 10/28/2023 9:45 PM EDT Estimated Award Date

Processing Status Bid Event Published Anticipated Contract Date

Hide Additional Event Info

Description: GRANTS

Contact

Phone

Email test123@sfs.ny.gov

Online Discussion

Payment Terms

Billing Location Office of Mental Health

Event Currency Dollar

Conversion Rate 1.00000000

Edits to Submitted Bids Not Allowed

Multiple Bids Allowed

Step	Action
20.	Click the Save for Later button.

SFS Handbook: Grantee Processing in SFS

The bid is not complete. (18058,342)

If you would like to save your bid for submittal at a later time, select "OK". If not, select "Cancel" to return to the bid response pages so that you can continue editing your bid.

OK

Cancel

Step	Action
21.	In the resulting popup, click the OK button to save your progress.

How many employees does your organization employ?

Response 100 Weighting 100.00000

Best 0 Worst 0

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event 1
Lines Responded To 0
Your Total Line Pricing 0.0000 USD

Hide Line Detail

* Bid Required Line Comments/Files

Lines

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	No Bid	Your Total Bid Price
1	1		LINE 1	EA		<input type="checkbox"/>	Bid

Event Comments and Attachments

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

Submit Bid Save for Later Validate Entries

Step	Action
22.	Scroll to the bottom of the page. Under the Lines section, click the numerical value link under the Period column to access budget and work plan information.

Business Unit OMH01 Budget Type PERFORMANCE
Event ID EVT0000082 Funded Amount 500000.000
Bidder Setid SHARE Period 1 Bidder ID 1000015277

Bid Event Periods

Period	Period From	Period To	Budget Required	Work Plan Required
1	10/01/2023	09/30/2024	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Budget properties Work Plan Properties

Bid Event Line# 1

<Return to Bid Response

SFS Handbook: Grantee Processing in SFS

Step	Action
23.	Click the Budget properties link.

Budget Properties Header

Event ID

EVT0000082

Max Award Amount

500000.000

Bid Event Period

1

Period From Date

10/01/2023

Bidder/Vendor ID

1000015277

Period To Date

09/30/2024

Budget Type

PERFORMANCE

Budget Properties

Apply Match

Allowed at Category

Calculate Match

Grant Fund

☐ Include Match Worksheet

☐ Allow Vendor to Add

☐ Use Other

☐ Overage on Claims

Overage %

Budget Category Properties

1-1 of 1

View All

	Budget Category	Available in Grant	Use Match	Match Percentage	Use Other	Overage on Claims	Overage Percentage		
1	Test Category	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>		+	-

Narrative

Step	Action
24.	Review the Budget Header Information . This section was completed by the agency.
25.	Review Budget Category Property section (including Narrative), noting which rows have Available in Grant checked. Note: This section was completed by the agency to help the grantee understand which Budget Category(s) require a response.

SFS Handbook: Grantee Processing in SFS

Budget Properties Header

Event ID: EVT0000082

Bid Event Period: 1

Bidder/Vendor ID: 1000015277

Max Award Amount: 500000.000

Period From Date: 10/01/2023

Period To Date: 09/30/2024

Budget Type: PERFORMANCE

Budget Properties

Apply Match: Allowed at Category 1

Calculate Match: Grant Fund

☐ Include Match Worksheet
☒ Allow Vendor to Add
☐ Use Other
☐ Overage on Claims

Overage %

Budget Category Properties

Budget Category	Available in Grant	Use Match	Match Percentage	Use Other	Overage on Claims	Overage Percentage
1 Test Category	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	+ -

Narrative

Step	Action
26.	Under Budget Category Property section, click Plus Sign (+) to add a new row.

Budget Properties Header

Bid Event Period: 1

Bidder/Vendor ID: 1000015277

Period From Date: 10/01/2023

Period To Date: 09/30/2024

Budget Type: PERFORMANCE

Budget Properties

Apply Match: Allowed at Category 1

Calculate Match: Grant Fund

☐ Include Match Worksheet
☒ Allow Vendor to Add
☐ Use Other
☐ Overage on Claims

Overage %

Budget Category Properties

Budget Category	Available in Grant	Use Match	Match Percentage	Use Other	Overage on Claims	Overage Percentage
1 Test Category	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	+ -
2 Test Category 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	+ -

Narrative

SFS Handbook: Grantee Processing in SFS

Step	Action
27.	Enter the applicable deliverable or outcome into the Budget Category field.
28.	Click the Available in Grant checkbox so the budget category details can be entered for the category.
29.	<p>Note:</p> <ul style="list-style-type: none"> When the Use Match checkbox is selected, the Match Funds field is available for entry on the Category Details page for the budget category. When the Use Other checkbox is selected, the Other Funds fields is available for entry on the Category Details page for the budget category. <p>In this example, we will not select these two options.</p>

Budget Properties Header

Q

1-2 of 2

View All

	Budget Category	Available in Grant	Use Match	Match Percentage	Use Other	Overage on Claims	Overage Percentage		
1	Test Category	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>		+	-
2	Test Category 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>		+	-



Narrative

Period Budget Summary

Q

1-2 of 2

View All

	Budget Category	Grant Funds Requested	Match Funds	Match % Calculated	Match % Required	Other Funds	Total	Category Details
1	Test Category	0.00	0.00	0	0	0.00	0.00	
2	Test Category 2	0.00	0.00	0	0	0.00	0.00	

Sub Totals

Grants Funds 0.00

Match % Calc 0.00

Match Funds 0.00

Other Funds 0.00

Total 0.00

Back

Save

Step	Action
30.	Scroll down to the Period Budget Summary section and click on the Category Details icon for the first budget category.

SFS Handbook: Grantee Processing in SFS

Category Details
x

[Help](#)

Budget Type PERFORMANCE
Budget Category Test Category

Match % Required

Category Details

1-1 of 1

View All

	Type/Description	Grant Funds	Match Funds	Match %	Other funds	Total Funds	Pos
1	<input style="width: 150px;" type="text"/>	<input style="width: 80px;" type="text"/>					<input type="checkbox"/>

Category Totals

Cumulative Grant Funds

0.00

Cumulative Match Funds

0.00

Cumulative Other Funds

0.00

Cumulative Category Details Totals

0.00



Narrative

OK

Cancel

Step	Action
31.	Leave the Type/Description field blank.
32.	Enter the applicable value into the Grant Funds field. In this example, we will enter 10,000 in the Grant Funds field.
33.	Enter the applicable value into the Match Funds field. Note: This field may be greyed out if it was not selected on the bid event; if greyed out, move onto next step.
34.	Enter the applicable value into the Other Funds field. Note: This field may be greyed out if it was not selected on the bid event; if greyed out, move on to the next step.

SFS Handbook: Grantee Processing in SFS

Step	Action
35.	Enter the applicable value into the Narrative field. Note: The narrative could be additional information for the agency or could be used to summarize the changes you made. In this example, we will leave this field blank.
36.	Click the OK button. 
37.	Under the Period Budget Summary section, click on Category Details icon for the second budget category.
38.	Leave the Type/Description field blank.
39.	Enter the applicable value into the Grant Funds field. In this example, enter 10,000 in the Grant Funds field.
40.	Enter the applicable value into the Match Funds field. Note: This field may be greyed out if it was not selected on the bid event; if greyed out, move onto next step.
41.	Enter the applicable value into the Other Funds field. Note: This field may be greyed out if it was not selected on the bid event; if greyed out, move onto next step.
42.	Enter the applicable value into the Narrative field. Note: The narrative could be additional information for the agency or could be used to summarize the changes you made. In this example, we will leave this field blank.
43.	Click the OK button. 

SFS Handbook: Grantee Processing in SFS

Budget Properties Header

	Budget Category	Available in Grant	Use Match	Match Percentage	Use Other	Overage on Claims	Overage Percentage		
1	Test Category	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>		<input style="width: 20px; height: 20px;" type="button" value="+"/>	<input style="width: 20px; height: 20px;" type="button" value="-"/>
2	Test Category 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>		<input style="width: 20px; height: 20px;" type="button" value="+"/>	<input style="width: 20px; height: 20px;" type="button" value="-"/>

Narrative

Period Budget Summary

	Budget Category	Grant Funds Requested	Match Funds	Match % Calculated	Match % Required	Other Funds	Total	Category Details
1	Test Category	10000.00	0.00	0	0	0.00	10000.00	
2	Test Category 2	10000.00	0.00	0	0	0.00	10000.00	

Sub Totals

Grants Funds	20000.00	Match % Calc	0.00
Match Funds	0.00	Other Funds	0.00
Total	20000.00		

Step	Action
44.	Click the Save button.
45.	Click the Back button.

← Bid Search Screen
Create Bids
New Window | Help | Personalize Page

Business Unit OMH01
 Event ID EYT0000082
 Bidder Setid SHARE

Budget Type PERFORMANCE
 Funded Amount 500000.000
 Period 1 Bidder ID 1000015277

Bid Event Periods

1 of 1
View All

Period 1
Budget Required ☐
[Budget properties](#)

Period From 10/01/2023
Period To 09/30/2024
Work Plan Required ☐
[Work Plan Properties](#)

1 of 1
View All

Bid Event Line# 1

[←Return to Bid Response](#)

Step	Action
46.	Click the Work Plan Properties link.

SFS Handbook: Grantee Processing in SFS

Step	Action
47.	Review the Work Plan Header information and verify the Allow Bidder Defined Objectives and Tasks is selected.
48.	Note: If the Allow Bidder Defined Objectives & Tasks box is checked and the Maximum Number of Objectives, Tasks, and Performance Measures have not already been entered, then you can add new objective, tasks, and performance measures if needed.
49.	Enter the applicable value into the Project Summary field.

Step	Action
50.	In this example, we will add additional rows in the Objectives >> Tasks >> Performance Measures section. Note: The First Objective with the underlying Task and Performance Measure in the list was entered by the agency. Click on the Objective row to add additional objectives.
51.	Click the + Objective button.
52.	On the Objective row, enter the applicable value in the Name field.
53.	On the Objective row, enter the applicable value in the Description field.

SFS Handbook: Grantee Processing in SFS

Objectives >> Tasks >> Performance Measures ?

Objective Task Perf. Measure Display Type: All

1-5 of 5 View All

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
<input type="checkbox"/>	Objective	1	Objective 1	Objective 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.1	Task 1	task 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.1.1	PM 1	PM 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Objective	2	Objective 2	Objective 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	2.1	Task 2	Task 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Objective Task Perf. Measure Display Type: All

Back Save Refresh

Step	Action
54.	Select the Objective row where the task will be added.
55.	Click + Task button.
56.	On the Task row, enter the applicable value in the Name field.
57.	On the Task row, enter the applicable value in the Description field.

Objectives >> Tasks >> Performance Measures ?

Objective Task Perf. Measure Display Type: All

1-6 of 6 View All

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
<input type="checkbox"/>	Objective	1	Objective 1	Objective 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.1	Task 1	task 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.1.1	PM 1	PM 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Objective	2	Objective 2	Objective 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Task	2.1	Task 2	Task 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	2.1.1	PM 2	PM 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Objective Task Perf. Measure Display Type: All

Back Save Refresh

Step	Action
58.	Select the Task row where the performance measure will be added.
59.	Click + Performance Measure button.
60.	On Performance Measure row, enter the applicable value in the Name field.

SFS Handbook: Grantee Processing in SFS

Step	Action
61.	On Performance Measure row, enter the applicable value in the Description field.

Objectives >> Tasks >> Performance Measures ?

Objective Task Perf. Measure Display Type: All

1-6 of 6 View All

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
<input type="checkbox"/>	Objective	1	Objective 1	Objective 1	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Task	1.1	Task 1	task 1	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.1.1	PM 1	PM 1	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Objective	2	Objective 2	Objective 2	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Task	2.1	Task 2	Task 2	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Performance Measure	2.1.1	PM 2	PM 2	<input type="checkbox"/>	<input type="checkbox"/>

Objective Task Perf. Measure Display Type: All

Back Save Refresh

Step	Action
62.	Click the arrow to the right of the More Details tab to expand the view and see all fields.

Event Bid Period Create Bids

Performance Measures ?

Perf. Measure Display Type: All

Sort Order	Name	Description	Required	Allowed to Sort	Allow Performance Measure	Perf Measure Response Type	Numeric (Target/Goal)
1	Objective 1	Objective 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
1.1	Task 1	task 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
1.1.1	PM 1	PM 1	<input type="checkbox"/>	<input type="checkbox"/>		Numeric	
2	Objective 2	Objective 2	<input type="checkbox"/>	<input type="checkbox"/>			
2.1	Task 2	Task 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
2.1.1	PM 2	PM 2	<input type="checkbox"/>	<input type="checkbox"/>		Numeric	100

Perf. Measure Display Type: All

Back Save Refresh

Step	Action
63.	Note: Available Performance Measure options are: <ul style="list-style-type: none"> Attachment Date

SFS Handbook: Grantee Processing in SFS

Step	Action
	<ul style="list-style-type: none"> Numeric Text/Comment Yes/No <p>In this example, on the Performance Measure row, we will select the Performance Measure Response Type drop-down list and select the Numeric option.</p>
64.	<p>Enter the applicable value into the Numeric (Target/Goal) field.</p> <p>In this example, we will enter 100 in the Numeric (Target/Goal) field.</p>
65.	Click the Save button.
66.	Click the Back button.

Step	Action
67.	Click the Return to Bid Response link.

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event: 1
Lines Responded To: 0
Your Total Line Pricing: 0.0000 USD

[Hide Line Detail](#)

★ Bid Required 🗨️ Line Comments/Files

Lines

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	No Bid	Your Total Bid Price		
1	1		LINE 1	EA	20000	<input type="checkbox"/>		Bid	🗨️

[Event Comments and Attachments](#)

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

SFS Handbook: Grantee Processing in SFS

Step	Action
68.	Note: The amount entered in the Your Unit Bid Price field must equal the total Grant Funds Requested amount for the period, in order to submit the bid response. In this example, we will enter 20,000 in the Your Unit Bid Price field.
69.	When you are ready to submit your bid response, click the Submit Bid button.

Are you done making changes and would like to post this bid? (18058,398)

Warning: Response may NOT be edited after posting. If you are not planning to make anymore changes to this bid press "Yes", otherwise press "No" and choose "Save For Later".

Step	Action
70.	In the resulting popup, click the Yes button to confirm you would like to submit the bid.
71.	You have successfully completed the Respond to Bid Event Performance Budget Types topic.

Respond to Bid Event Capital Budget Types

Topic Description:

This topic provides the knowledge and skills to respond to Bid Event Capital Budget Types. Budget types dictate the grant opportunity attributes available for each section of a period budget. Capital budget types allow grantees to record costs related to capital spending on the bid event and grant contract.

Topic Objectives:

In this topic, you will learn:

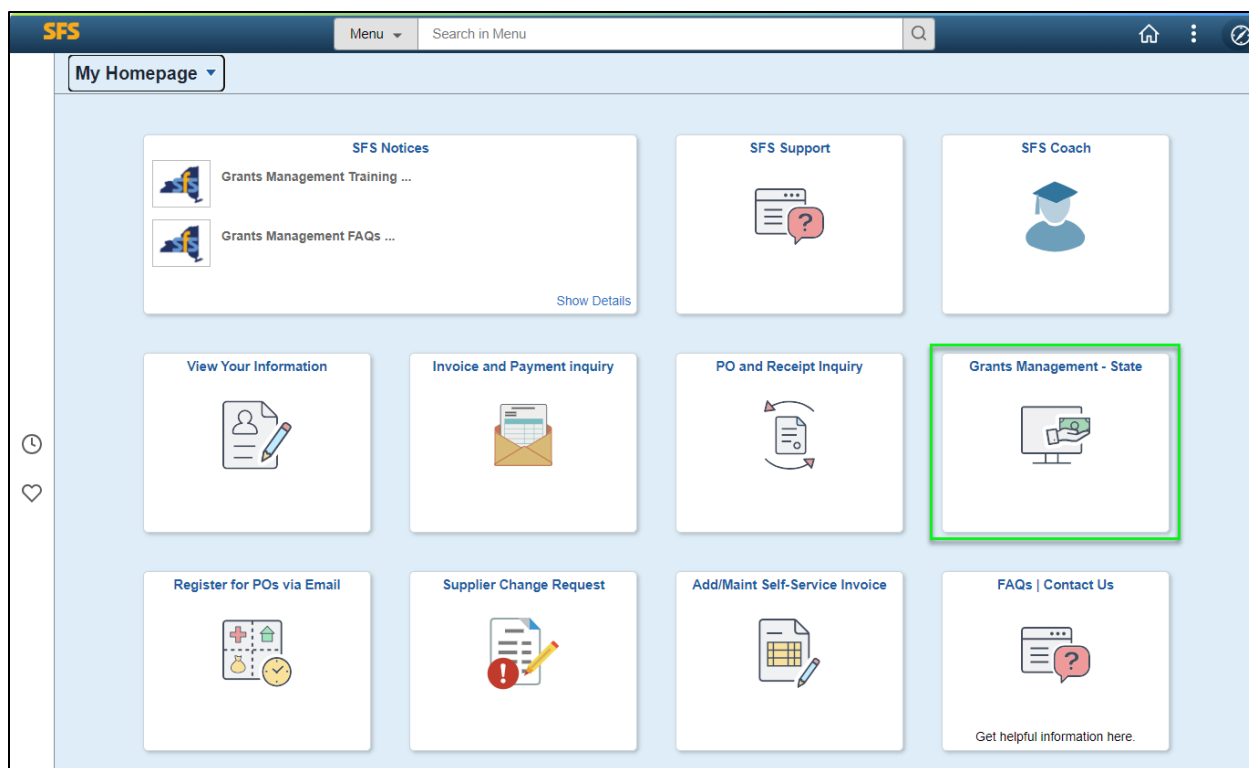
- How to respond to Bid Event Capital Budget Types


Procedure

Scenario: You will log in to the SFS Vendor Portal, search for an available bid event (grant opportunity) and respond to the agency questions. You will also enter your budget, work plan information, and your bid price before submitting to the agency for review.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

SFS Handbook: Grantee Processing in SFS



Step	Action
1.	<p>Preferred Navigation: Click the Grant Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > Manage Events and Place Bids > View Events and Place Bids</p>  <p>Note: You must log in to the SFS Vendor Portal to respond to a bid event.</p>



Step	Action
2.	Click the Bid Event Search tile.

SFS Handbook: Grantee Processing in SFS

Grants Management **View Events and Place Bids**

Welcome,
 User:

View Events and Place Bids
Enter search criteria to locate an event for viewing or placing bids.

Search Criteria

Event ID

Search by Grant Opportunity

Search by Due Date From To

Search by Status


Search by Eligibility

Search by Funding Agency

Search by Service Area

Search Results

Event ID	Funding Agency	Grant Opportunity	Status	Eligibility	Availability Date	Anticipated Release Date	Due Date
EVT0000082	OMH01	101123 TEST-4	Available	Governmental Entity, Not-For-Profit	10/11/23 1:46PM	10/11/23 1:46PM	10/20/2023 1:46PM EDT

Step	Action
3.	Enter the applicable search criteria in the Search Criteria fields. In this example, we will select the Search by Status field drop-down list and click Available from the list.
4.	Click the Search button. 
5.	Click an Event ID link to initiate a bid response.

Supplier Search Events **Event Details**

Welcome,
 User:

Event Details

[Information On Inquiry Options](#)

Bidding Shortcuts: [View Event Activity](#) [View Event Package](#) [Upload XML Bid Response](#)

Event Name 101123 TEST-4
Event ID OMH01-EVT0000082
Event Format/Type Sell Event RFx
Event Round 1
Event Version 1
Event Start Date 10/11/2023 1:46PM EDT
Event End Date 10/20/2023 01:46 PM EDT

Event Description: GRANTS

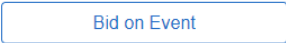
Contact
Phone
Email test123@sfs.ny.gov
Online Discussion
Live Chat Help

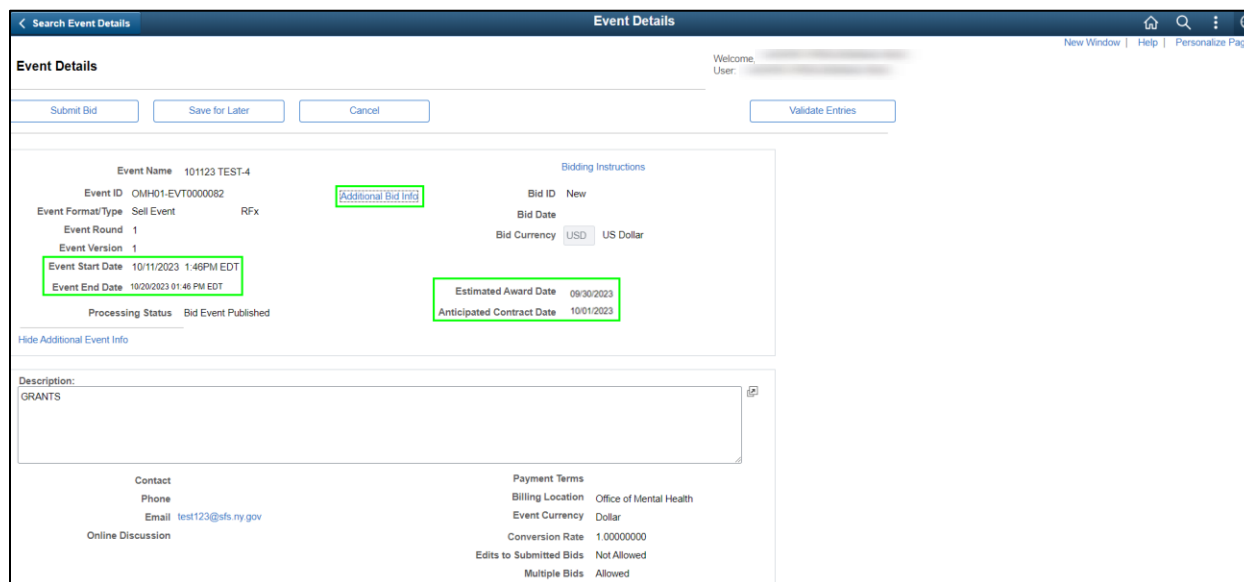
Payment Terms
My Bids 0
Edits to Submitted Bids Not Allowed
Multiple Bids Allowed

*Bid Required [Line Comments/Files](#)

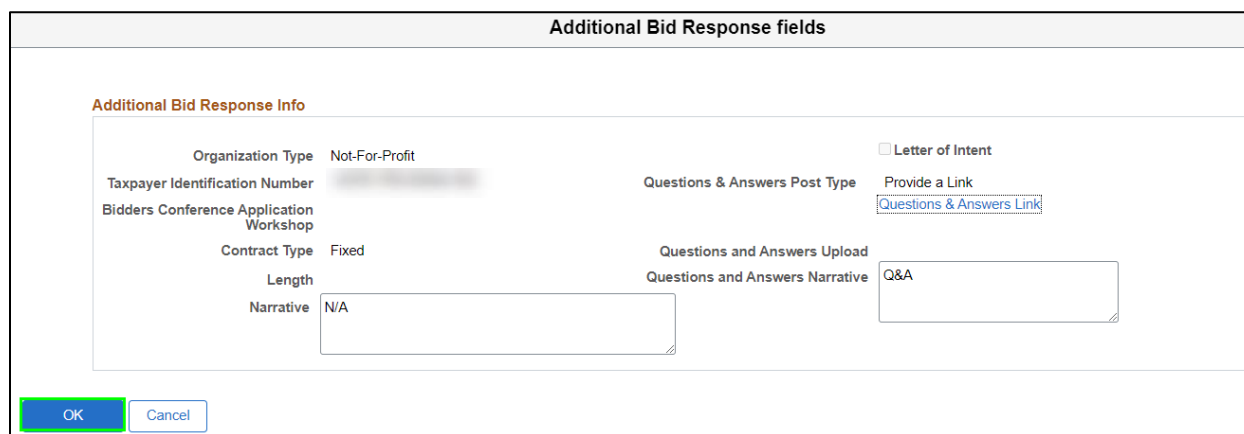
Lines

SFS Handbook: Grantee Processing in SFS

Step	Action
6.	Click the Bid on Event button. 



Step	Action
7.	Review the Event Start , Event End Date , Estimated Award Date , Anticipated Contract Date fields.
8.	Click the Additional Bid Info link.



Step	Action
9.	Review the Additional Bid Info . Click the OK button to return to the Event Details page.

SFS Handbook: Grantee Processing in SFS

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event 1
 Lines Responded To 0
 Your Total Line Pricing 0.0000 USD

[Hide Line Detail](#)

★ Bid Required [Line Comments/Files](#)

Lines

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	No Bid	Your Total Bid Price		
1	1		LINE 1	EA	<input type="text"/>	<input type="checkbox"/>		Bid	Comment

[Event Comments and Attachments](#)

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

[Submit Bid](#) [Save for Later](#) [Validate Entries](#)

[Return to Event Search](#)

Step	Action
10.	Select the Events Comments and Attachments link, located at the bottom of the page, to view any instructions, attachments and/or comments. You may need to scroll to see this link.

SFS Handbook: Grantee Processing in SFS

Event Comments and Attachments

Business Unit OMH01

Event ID EVT0000082

Event Round: 1

Event Version: 1

Attachments

View Event Attachments ?

1-1 of 1

Attached File	Attachment Description	Event RFx Doc	Upload	View
			Upload	View

Add New Attachments ?

1-2 of 2

Attached File	Attachment Description	Upload	View		
Instructions_document.pdf		Upload	View	Add New Attachments	Delete
Reporting_Template.pdf		Upload	View	Add New Attachments	Delete

Comments

Add New Comments ?

Please review attached instructions before responding to bid event.

OK

Cancel

Step	Action
11.	Click the OK button after viewing the instructions, attachments, and comments.

Search Event Details

Event Details

Event Name 101123 TEST-4

Event ID OMH01-EVT0000082

Additional Bid Info

Bid ID New

Event Format/Type Sell Event

RFX

Bid Date

Event Round 1

Event Version 1

Bid Currency USD US Dollar

Event Start Date 10/11/2023 1:46PM EDT

Event End Date 10/20/2023 01:46 PM EDT

Estimated Award Date

Processing Status Bid Event Published

Anticipated Contract Date

Hide Additional Event Info

Description: GRANTS

Contact

Phone

Email test123@sfs.ny.gov

Online Discussion

Payment Terms

Billing Location Office of Mental Health

Event Currency Dollar

Conversion Rate 1.00000000

Edits to Submitted Bids Not Allowed

Multiple Bids Allowed

Step 1: Answer General Event Questions

The event administrator requests your response to questions not specific to any specific item.

General Event Questions 1

Required Questions 1

Questions Responded To 0

DUNS Number

Organization Website

Bidder Contact Information

Name

Telephone

Email

Site/Project Address

User Name Child Care Solutions

SFS Handbook: Grantee Processing in SFS

Step	Action
12.	Use the scrollbar to navigate to the Step 1: Answer General Event Questions section.
13.	If applicable, enter a DUNS Number in the DUNS Number field. This field is optional and not required.
14.	If applicable, enter your Organization Website in the Organization Website field. This field is optional and not required.
15.	Under the Bidder Contact Information , enter the following information: <ul style="list-style-type: none"> • Name • Telephone • Email <p>Note: The contact listed should be the person/people within the NFP who can be contacted with questions about the bid response</p>
16.	Click the Site/Project Address link.

Bid Response address fields

×

[Help](#)

Site/Project Address

Q

| < <

1 of 1 ▾

> >|

| View All

+

-

Address Line 1

10 Tester Lane

Address Line 2

City

Albany

Postal Code

12222

State

NY

OK

Cancel

Step	Action
17.	Enter Address Details , including the following information: <ul style="list-style-type: none"> • Address Line 1

SFS Handbook: Grantee Processing in SFS

Step	Action
	<ul style="list-style-type: none"> • Address Line 2 (if applicable) • City • Postal Code • State <p>Note: The Site/Project Address is where the grant will be used, or funds will be spent.</p>
18.	When you have finished entering address details, click the OK button.

The screenshot shows the 'Event Details' interface. Under the 'Event Questions' section, there are two questions. The first question, marked with a red star, is 'Applicant must be a 501c3 organization to apply'. It has a 'Response' dropdown menu currently set to 'Yes' and a 'Weighting' field. The second question, also marked with a red star, asks to 'Describe why your organization is qualified to implement the proposed program model outlined in Section III Program Model Description. Include both quantitative and qualitative evidence to address this question and experience with engaging with PWD and priority population(s)'. The response text area contains the text 'My organization is qualified because...'.

Step	Action
19.	<p>Review and respond to Event Questions. Those that are flagged as Required (*) must be responded to in order to submit a bid response.</p> <p>Note: The ability to add a Comment/Attachment will vary based on the question.</p>

SFS Handbook: Grantee Processing in SFS

Event Details

Welcome, User: [redacted]

[New Window](#) | [Help](#) | [Personalize Page...](#)

Event Details

Message not found

[Submit Bid](#) [Save for Later](#) [Cancel](#) [Validate Entries](#)

Event Name 101123 TEST-4 [Bidding Instructions](#)

Event ID OMH01-EVT0000082 [Additional Bid Info](#) Bid ID 1

Event Format/Type Sell Event RFX Bid Date

Event Round 1 Bid Currency USD US Dollar

Event Version 1

Event Start Date 10/11/2023 1:48PM EDT

Event End Date 10/26/2023 01:48 PM EDT

Processing Status Bid Event Published

Estimated Award Date

Anticipated Contract Date

[Hide Additional Event Info](#)

Description:

GRANTS

Contact

Phone

Email test123@sfs.ny.gov

Online Discussion

Payment Terms

Billing Location Office of Mental Health

Event Currency Dollar

Conversion Rate 1.00000000

Edits to Submitted Bids Not Allowed

Multiple Bids Allowed

Step	Action
20.	Click the Save for Later button.

The bid is not complete. (18058,342)

If you would like to save your bid for submittal at a later time, select "OK". If not, select "Cancel" to return to the bid response pages so that you can continue editing your bid.

[OK](#) [Cancel](#)

Step	Action
21.	In the resulting popup, click the OK button to save your progress.

SFS Handbook: Grantee Processing in SFS

Bid Menu **Event Details**

How many employees does your organization employ?

Response Weighting 100.00000

Best 0

Worst 0

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event 1

Lines Responded To 0

Your Total Line Pricing 0.0000 USD

[Hide Line Detail](#)

***Bid Required** [Line Comments/Files](#)

Lines

[View All](#)

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	No Bid	Your Total Bid Price		
1	1		LINE 1	EA	<input type="text"/>	<input type="checkbox"/>		Bid	View

[Event Comments and Attachments](#)

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

[Submit Bid](#) [Save for Later](#) [Validate Entries](#)

Step	Action
22.	Scroll to the bottom of the page. Under the Lines section, click the numerical value link under the Period column to access budget and work plan information.

Bid Search Screen **Create Bids**

Business Unit OMB-01 Budget Type CAPITAL

Event ID EVT0000082 Funded Amount 500000.000

Bidder Setid SHARE Period 1 Bidder ID 1000015277

Bid Event Periods

Period 1

Period From 10/01/2023 Period To 09/30/2024

☐ Budget Required [Budget properties](#)

☐ Work Plan Required [Work Plan Properties](#)

[View All](#)

Bid Event Line# 1

[Return to Bid Response](#)

Step	Action
23.	Click the Budget properties link.

SFS Handbook: Grantee Processing in SFS

Event ID

EVT0000082

Max Award Amount

500000.000

Bid Event Period

1

Period From Date

10/01/2023

Bidder/Vendor ID

1000015277

Period To Date

09/30/2024

Budget Type

CAPITAL

Apply Match

Allowed at Category I

Calculate Match

Grant Fund

Overage %

1-7 of 7

View 5

Budget Category	Available in Grant	Use Match	Match Percentage	Use Other	Overage on Claims	Overage Percentage
1 SCOPING & PRE-DEVELOPMENT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	
2 DESIGN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	
3 ACQUISITION	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	
4 CONSTRUCTION	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	
5 ADMINISTRATION	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	

Step	Action
24.	Review the Budget Header Information . This section was completed by the agency.
25.	Review Budget Category Property section (including Narrative), noting which rows have Available in Grant checked. Note: This section was completed by the agency to help the grantee understand which Budget Category(s) require a response. Grantees will need to scroll down to view the sections they are responsible for updating.

SFS Handbook: Grantee Processing in SFS

Budget Properties Header

Narrative

Period Budget Summary

☐ ☐

1-7 of 7

View All

	Budget Category	Grant Funds Requested	Match Funds	Match % Calculated	Match % Required	Other Funds	Total	Category Details
1	SCOPING & PRE-DEVELOPMENT	0.00	0.00	0	0	0.00	0.00	
2	DESIGN	0.00	0.00	0	0	0.00	0.00	
3	ACQUISITION	0.00	0.00	0	0	0.00	0.00	
4	CONSTRUCTION	0.00	0.00	0	0	0.00	0.00	
5	ADMINISTRATION	0.00	0.00	0	0	0.00	0.00	
6	WORKING CAPITAL/RESERVES	0.00	0.00	0	0	0.00	0.00	
7	OTHER	0.00	0.00	0	0	0.00	0.00	

Sub Totals

Grants Funds 0.00
 Match Funds 0.00
 Total 0.00

Match % Calc 0.00
 Other Funds 0.00

Back

Save

Step	Action
26.	<p>Under the Period Budget Summary section, click on View All icon to show all budget categories.</p> <p>In this example, we will enter budget information for the Scoping & Pre-development and Design budget categories.</p>
27.	<p>Under the Period Budget Summary section, click on Category Details icon for the Scoping & Pre-development budget category.</p> <div style="border: 1px solid black; width: 40px; height: 40px; margin: 10px auto; text-align: center; line-height: 40px;"> </div> <p>Note: Where the icon cannot be clicked, the agency has not checked the Available in Grant checkbox above.</p>

SFS Handbook: Grantee Processing in SFS

X
Help

Budget Type CAPITAL

Budget Category SCOPING & PRE-DEVELOPMENT

Match % Required

Category Details

1-1 of 1

View All

	Type/Description	Grant Funds	Match Funds	Match %	Other funds
1	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>			

Category Totals

Cumulative Grant Funds 0.00

Cumulative Match Funds 0.00

Cumulative Other Funds 0.00

Cumulative Category Details Totals 0.00

Narrative



OK

Cancel

Step	Action
28.	Leave the Type/Description field blank.
29.	Enter the applicable value into the Grant Funds field. In this example, we will enter 10,000 in the Grant Funds field.
30.	Enter the applicable value into the Match Funds field. In this example, we will leave this field blank.
31.	Enter the applicable value into the Other Funds field. Note: This field may be greyed out if it was not selected on the bid event; if greyed out, move on to the next step.
32.	Enter the applicable value into the Narrative field. Note: The narrative could be additional information for the agency or could be used to summarize the changes you made. In this example, we will leave this field blank.

Page 110

SFS Handbook: Grantee Processing in SFS

Step	Action
33.	Click the OK button. 
34.	Under the Period Budget Summary section, click on Category Details icon for the Design budget category.
35.	Leave the Type/Description field blank.
36.	Enter the applicable value into the Grant Funds field. In this example, we will enter 10,000 in the Grant Funds field.
37.	Enter the applicable value into the Match Funds field. In this example, we will leave this field blank.
38.	Enter the applicable value into the Other Funds field. Note: This field may be greyed out if it was not selected on the bid event; if greyed out, move onto next step.
39.	Enter the applicable value into the Narrative field. Note: The narrative could be additional information for the agency or could be used to summarize the changes you made. In this example, we will leave this field blank.
40.	Click the OK button. 

SFS Handbook: Grantee Processing in SFS

Budget Properties Header

Narrative

Period Budget Summary

1-7 of 7
 View 5

	Budget Category	Grant Funds Requested	Match Funds	Match % Calculated	Match % Required	Other Funds	Total	Category Details
1	SCOPING & PRE-DEVELOPMENT	10000.00	0.00	0	0	0.00	10000.00	
2	DESIGN	10000.00	0.00	0	0	0.00	10000.00	
3	ACQUISITION	0.00	0.00	0	0	0.00	0.00	
4	CONSTRUCTION	0.00	0.00	0	0	0.00	0.00	
5	ADMINISTRATION	0.00	0.00	0	0	0.00	0.00	
6	WORKING CAPITAL/RESERVES	0.00	0.00	0	0	0.00	0.00	
7	OTHER	0.00	0.00	0	0	0.00	0.00	

Sub Totals

Grants Funds	20000.00	Match % Calc	0.00
Match Funds	0.00	Other Funds	0.00
Total	20000.00		

Back

Save

Step	Action
41.	Click the Save button.
42.	Click the Back button.

< Bid Search Screen
Create Bids

Business Unit OM/H01
 Event ID EVT0000082
 Bidder Setid SHARE

Budget Type CAPITAL
 Funded Amount 500000.000
 Period 1 Bidder ID 1000015277

Bid Event Periods

 1 of 1
 View All

Period 1
 Period From 10/01/2023 Period To 09/30/2024

☐ Budget Required Budget properties
☐ Work Plan Required Work Plan Properties

1 of 1
View All

Bid Event Line# 1

[<Return to Bid Response](#)

Step	Action
43.	Click the Work Plan Properties link.

SFS Handbook: Grantee Processing in SFS

Step	Action
44.	Review the Work Plan Header information and verify the Allow Bidder Defined Objectives and Tasks is selected.
45.	Note: If the Allow Bidder Defined Objectives & Tasks box is checked and the Maximum Number of Objectives, Tasks, and Performance Measures have not already been entered, then you can add new objective, tasks, and performance measures if needed.
46.	Enter the applicable value into the Project Summary field.

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
<input checked="" type="checkbox"/>	Objective	1	Objective 1	Objective 1	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Task	1.1	Task 1	task 1	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.1.1	PM 1	PM 1	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Objective	2	Objective 2	Objective 2	<input type="checkbox"/>	<input type="checkbox"/>

Step	Action
47.	In this example, we will add additional rows in the Objectives >> Tasks >> Performance Measures section. Note: The First Objective with the underlying Task and Performance Measure in the list was entered by the agency. Click on the Objective row to add additional objectives.
48.	Click the + Objective button.
49.	On the Objective row, enter the applicable value in the Name field.
50.	On the Objective row, enter the applicable value in the Description field.

SFS Handbook: Grantee Processing in SFS

Objectives >> Tasks >> Performance Measures ?

Objective Task Perf. Measure Display Type: All

1-5 of 5 View All

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
<input type="checkbox"/>	Objective	1	Objective 1	Objective 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.1	Task 1	task 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.1.1	PM 1	PM 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Objective	2	Objective 2	Objective 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	2.1	Task 2	Task 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Objective Task Perf. Measure Display Type: All

Back Save Refresh

Step	Action
51.	Select the Objective row where the task will be added.
52.	Click + Task button.
53.	On the Task row, enter the applicable value in the Name field.
54.	On the Task row, enter the applicable value in the Description field.

Objectives >> Tasks >> Performance Measures ?

Objective Task Perf. Measure Display Type: All

1-6 of 6 View All

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
<input type="checkbox"/>	Objective	1	Objective 1	Objective 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.1	Task 1	task 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.1.1	PM 1	PM 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Objective	2	Objective 2	Objective 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Task	2.1	Task 2	Task 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	2.1.1	PM 2	PM 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Objective Task Perf. Measure Display Type: All

Back Save Refresh

Step	Action
55.	Select the Task row where the performance measure will be added.
56.	Click + Performance Measure button.
57.	On Performance Measure row, enter the applicable value in the Name field.

SFS Handbook: Grantee Processing in SFS

Step	Action
58.	On Performance Measure row, enter the applicable value in the Description field.

Objectives >> Tasks >> Performance Measures ?

Objective Task Perf. Measure Display Type: All

Basic Info More Details **||>**

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
1 <input type="checkbox"/>	▼ Objective	1	Objective 1	Objective 1	<input type="checkbox"/>	<input type="checkbox"/>
2 <input type="checkbox"/>	▼ Task	1.1	Task 1	task 1	<input type="checkbox"/>	<input type="checkbox"/>
3 <input type="checkbox"/>	Performance Measure	1.1.1	PM 1	PM 1	<input type="checkbox"/>	<input type="checkbox"/>
4 <input type="checkbox"/>	▼ Objective	2	Objective 2	Objective 2	<input type="checkbox"/>	<input type="checkbox"/>
5 <input checked="" type="checkbox"/>	▼ Task	2.1	Task 2	Task 2	<input type="checkbox"/>	<input type="checkbox"/>
6 <input type="checkbox"/>	Performance Measure	2.1.1	PM 2	PM 2	<input type="checkbox"/>	<input type="checkbox"/>

Objective Task Perf. Measure Display Type: All

Back Save Refresh

Step	Action
59.	Click the arrow to the right of the More Details tab to expand the view and see all fields.

Event Bid Period Create Bids

Performance Measures ?

Perf. Measure Display Type: All

	Sort Order	Name	Description	Required	Allowed to Sort	Allow Performance Measure	Perf Measure Response Type	Numeric (Target/Goal)
Objective	1	Objective 1	Objective 1	<input type="checkbox"/>	<input type="checkbox"/>			
Task	1.1	Task 1	task 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Performance Measure	1.1.1	PM 1	PM 1	<input type="checkbox"/>	<input type="checkbox"/>		Numeric	
Objective	2	Objective 2	Objective 2	<input type="checkbox"/>	<input type="checkbox"/>			
Task	2.1	Task 2	Task 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Performance Measure	2.1.1	PM 2	PM 2	<input type="checkbox"/>	<input type="checkbox"/>		Numeric	100

Perf. Measure Display Type: All

Back Save Refresh

Step	Action
60.	Note: Available Performance Measure options are: <ul style="list-style-type: none"> Attachment Date

SFS Handbook: Grantee Processing in SFS

Step	Action
	<ul style="list-style-type: none"> Numeric Text/Comment Yes/No <p>In this example, on the Performance Measure row, we will select the Performance Measure Response Type drop-down list and select the Numeric option.</p>
61.	<p>Enter the applicable value into the Numeric (Target/Goal) field.</p> <p>In this example, we will enter 100 in the Numeric (Target/Goal) field.</p>
62.	Click the Save button.
63.	Click the Back button.

Step	Action
64.	Click the Return to Bid Response link.

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event: 1
 Lines Responded To: 0
 Your Total Line Pricing: 0.0000 USD

[Hide Line Detail](#)

★ Bid Required 🗨️ Line Comments/Files

Lines

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	No Bid	Your Total Bid Price	
1	1		LINE 1	EA	20000	<input type="checkbox"/>		Bid

[Event Comments and Attachments](#)

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

SFS Handbook: Grantee Processing in SFS

Step	Action
65.	Note: The amount entered in the Your Unit Bid Price field must equal the total Grant Funds Requested amount for the period, in order to submit the bid response. In this example, we will enter 20,000 in the Your Unit Bid Price field.
66.	When you are ready to submit your bid response, click the Submit Bid button.

Are you done making changes and would like to post this bid? (18058,398)

Warning: Response may NOT be edited after posting. If you are not planning to make anymore changes to this bid press "Yes", otherwise press "No" and choose "Save For Later".

Step	Action
67.	In the resulting popup, click the Yes button to confirm you would like to submit the bid.
68.	You have successfully completed the Respond to Bid Event Capital Budget Types topic.

Using the Match Worksheet for a Bid Response

Topic Description:

This topic provides the knowledge and skills to use the Match Worksheet for a Bid Response. The Match Worksheet allows grantees to provide details on budget amounts that have been entered. The ability to use the Match Worksheet will vary based on the agency.

Topic Objectives:

In this topic, you will learn:

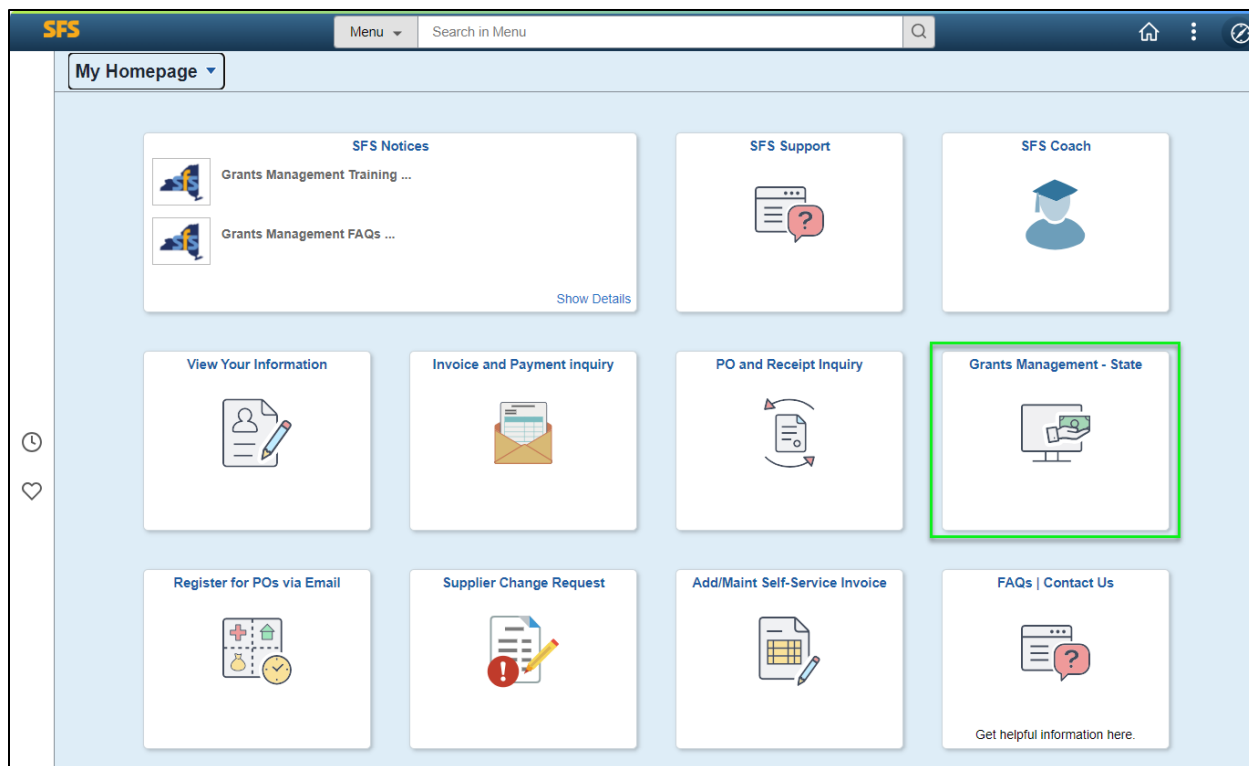
- How to use the Match Worksheet for a Bid Response


Procedure

Scenario: You have a bid response already saved and in process. You will use the match worksheet to provide details on the budget amounts that have already been entered.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

SFS Handbook: Grantee Processing in SFS



Step	Action
1.	<p>Preferred Navigation: Click the Grant Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > Manage Events and Place Bids > View Events and Place Bids</p>  <p>Note: You must log in to the SFS Vendor Portal to respond to a bid event.</p>



Step	Action
2.	Click the Bid Event Search tile.

SFS Handbook: Grantee Processing in SFS

Grants Management

View Events and Place Bids

Welcome, [User Name]
User: [User Name]

View Events and Place Bids

Enter search criteria to locate an event for viewing or placing bids.

Search Criteria

Event ID

Search by Grant Opportunity

Search by Due Date

From

To

Search by Status

Available

Search by Eligibility

Not-For-Profit

Search by Funding Agency

Q

Search by Service Area

Search

Clear Criteria

Search Results

1-1 of 1

Event ID	Funding Agency	Grant Opportunity	Status	Eligibility	Availability Date	Anticipated Release Date	Due Date
EVT0000082	OMH01	101123 TEST-4	Available	Governmental Entity, Not-For-Profit	10/11/23 1:46PM	10/11/23 1:46PM	10/20/2023 1:46PM EDT

Step	Action
3.	<p>Enter the applicable search criteria in the Search Criteria fields.</p> <p>In this example, select the Search by Status field drop-down list and click Available from the list.</p>
4.	<p>Click the Search button.</p> <div><div>Search</div></div>
5.	<p>Click an Event ID link to update an in-process bid response.</p> <p>In this example, we will click the Bid Event EVT0000082 link to update a bid response.</p>

SFS Handbook: Grantee Processing in SFS

Event Details

Welcome, [User Name]
User: [User Name]

Information On Inquiry Options
[Bid on Event](#)

Bidding Shortcuts:
[View Event Activity](#)
[View Event Package](#)
[Upload XML Bid Response](#)
[View, Edit or Copy from Saved Bids](#)

Event Name: 101123 TEST-4
 Event ID: OMH01-EVT0000082
 Event Format/Type: Sell Event RFx
 Event Round: 1
 Event Version: 1
 Event Start Date: 10/11/2023 1:46PM EDT
 Event End Date: 10/20/2023 01:46 PM EDT

Event Description: GRANTS

Contact: [Name]
 Phone: [Number]
 Email: test123@sfs.ny.gov
 Online Discussion
 Live Chat Help

Payment Terms:
 My Bids: **1 In-Process**
 Edits to Submitted Bids: Not Allowed
 Multiple Bids: Allowed

★ Bid Required Ⓞ Line Comments/Files

[Lines](#)

Step	Action
6.	Click on My Bids In Process link to view your in-process response to this bid event.

View, Edit or copy from Saved Bids

Welcome, [User Name]
User: [User Name]

Event Name: 101123 TEST-4
 Event ID: OMH01-EVT0000082
 Event Format/Type: Sell Event RFx
 Event Start Date: 10/11/2023 1:46PM EDT
 Event End Date: 10/20/2023 01:46 PM EDT
 Event Round: 1
 Event Version: 1
 Multiple Bids: Allowed
 Currency: US Dollar

Bids

1-1 of 1

Bid ID	Round	Version	Bid Status	Event Status	Bid Last Saved				
1	1	1	Saved	Posted	10/13/2023 1:21PM EDT	View/Edit	Copy	Cancel	Upload

[Return to Event Search](#)

Step	Action
7.	Click the View/Edit link for the applicable bid response you want to view and update.

SFS Handbook: Grantee Processing in SFS

Bid Menu **Event Details**

How many employees does your organization employ?

Response Weighting 100.00000

Best 0
Worst 0

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event 1
Lines Responded To 0
Your Total Line Pricing 0.0000 USD

[Hide Line Detail](#)

*Bid Required ☐ Line Comments/Files

Lines

1 of 1 View All

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	No Bid	Your Total Bid Price		
1	1		LINE 1	EA	<input type="text"/>	<input type="checkbox"/>		Bid	<input type="text"/>

[Event Comments and Attachments](#)

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

Step	Action
8.	Scroll to the bottom of the page of the existing bid response. Under the Lines section, click the numerical value link under the Period column to access budget and work plan information for this bid response.

Bid Search Screen **Create Bids**

Business Unit OMH01 Budget Type EXPENDITURE
Event ID EVT0000082 Funded Amount 500000.000
Bidder Setid SHARE Period 1 Bidder ID 1000015277

Bid Event Periods 1 of 1 View All

Period 1
Period From 10/01/2023 Period To 09/30/2024 ☐ Budget Required [Budget properties](#)
☐ Work Plan Required [Work Plan Properties](#)

1 of 1 View All

Bid Event Line# 1

[Return to Bid Response](#)

Step	Action
9.	Click the Budget Properties link.

SFS Handbook: Grantee Processing in SFS

Budget Properties Header

[Help](#)

Event ID EVT0000082

Bid Event Period 1

Bidder/Vendor ID 1000015277

Max Award Amount 500000.000

Period From Date 10/01/2023

Period To Date 09/30/2024

Budget Type EXPENDITURE

Budget Properties

Apply Match Allowed at Category 1

Calculate Match Grant Fund

☐ Include Match Worksheet
 Match Worksheet

Budget Category Properties

☐

1-5 of 10
View All

	Budget Category	Available in Grant	Use Match	Match Percentage	Use Other	Overage on Claims	Overage Percentage
1	SALARY	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	
2	FRINGE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	
3	CONTRACTUAL	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	
4	TRAVEL	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	

Step	Action
10.	Click the Match Worksheet link.

Include Match Worksheet

[Help](#)

Include Match Worksheet

☐

1-1 of 1
View All

	Source of Matching Funds	Describe Match source	Form of Documentation Required	Match Total		
1	<input style="width: 150px;" type="text"/>	<input type="text"/>	<input style="width: 150px;" type="text"/>	<input style="width: 80px;" type="text"/>	<input style="width: 30px; height: 20px;" type="button" value="+"/>	<input style="width: 30px; height: 20px;" type="button" value="-"/>

Match Worksheet Detail Total 0.00

Budget Detail Match Total 0.00

Narrative

OK

Cancel

Step	Action
11.	Enter applicable value in the Source of Match Funds field.

SFS Handbook: Grantee Processing in SFS

Step	Action
12.	Click the Describe Match Source drop-down field and select the applicable value from the list. The options are: Federal , Local , Private , or State .
13.	Enter the applicable value into the Form of Documentation Required field.
14.	Enter the applicable match amounts in the Match Total field. Note: The sum of the Match Total amounts will equal the Match Worksheet Detail Total amount.
15.	Enter any applicable comments in the Narrative field. Note: The narrative could be additional information for the agency or could be used to summarize the changes you made.
16.	Click the OK button.
17.	Click the Save button and then click the Back button.
18.	Click the Return to Bid Response link.
19.	Click the Save for Later button.
20.	You have successfully completed the Using the Match Worksheet for a Bid Response topic.

Reviewing and Approving Grant Contracts

Lesson Description:

This lesson provides the knowledge and skills to review and approve grant contracts. This lesson also provides information on how to complete and submit progress reports for approval.

Progress reporting is a tool that measures the progress of the grant contract over its lifetime in SFS.

Lesson Objectives:

In this lesson, you will learn how to:

- Preview a Contract Agreement
- Review and Update Budget and Work Plan Information on a Contract
- Approve Contract Collaboration
- Apply Electronic Signature on a Contract Agreement
- Complete Performance Measures for a Progress Report and Submit a Progress Report for Agency Review
- Update and Re-submit a Returned Progress Report

Preview a Contract Agreement

Topic Description:

This topic provides the knowledge and skills to review a Contract Agreement.

SFS Handbook: Grantee Processing in SFS

Topic Objectives:

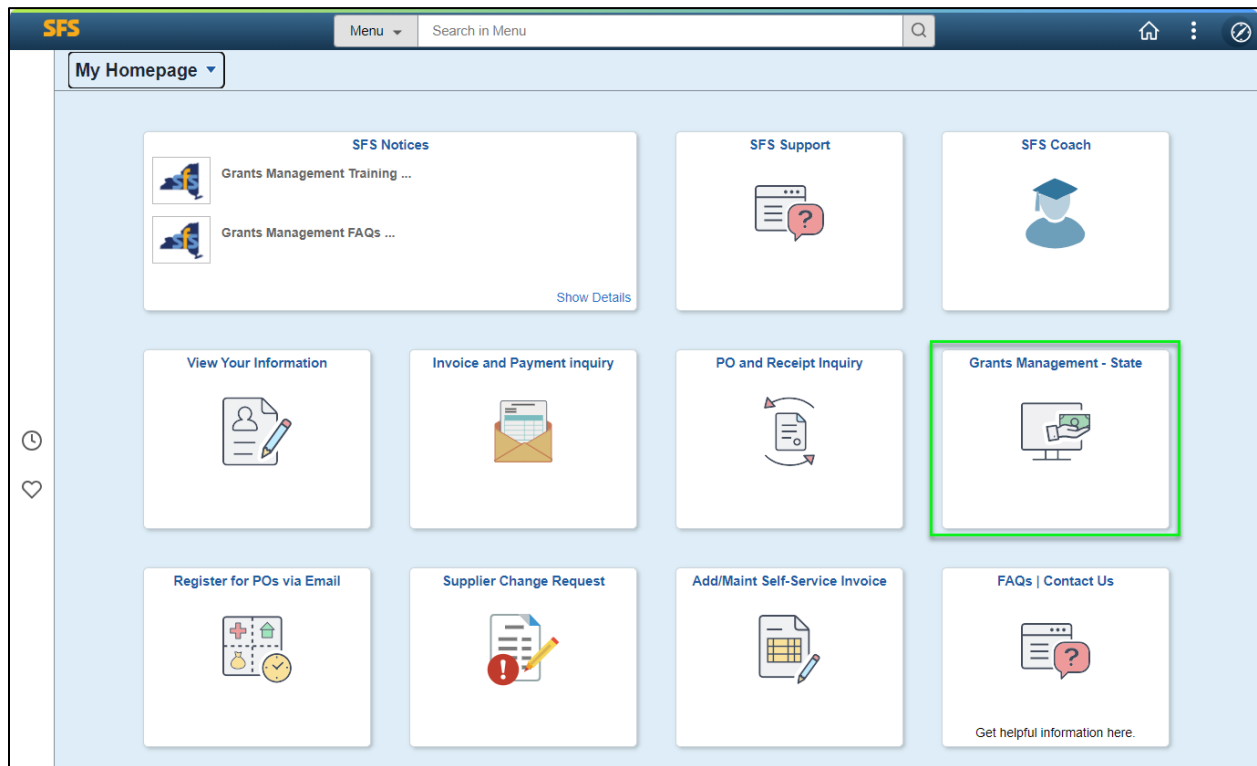
In this topic, you will learn:

- How to review a Contract Agreement

Procedure

Scenario: You have been awarded a grant contract and would like to preview the grant contract before you take action on it. You will navigate to the Maintain Contract Documents page and click the View Document button.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

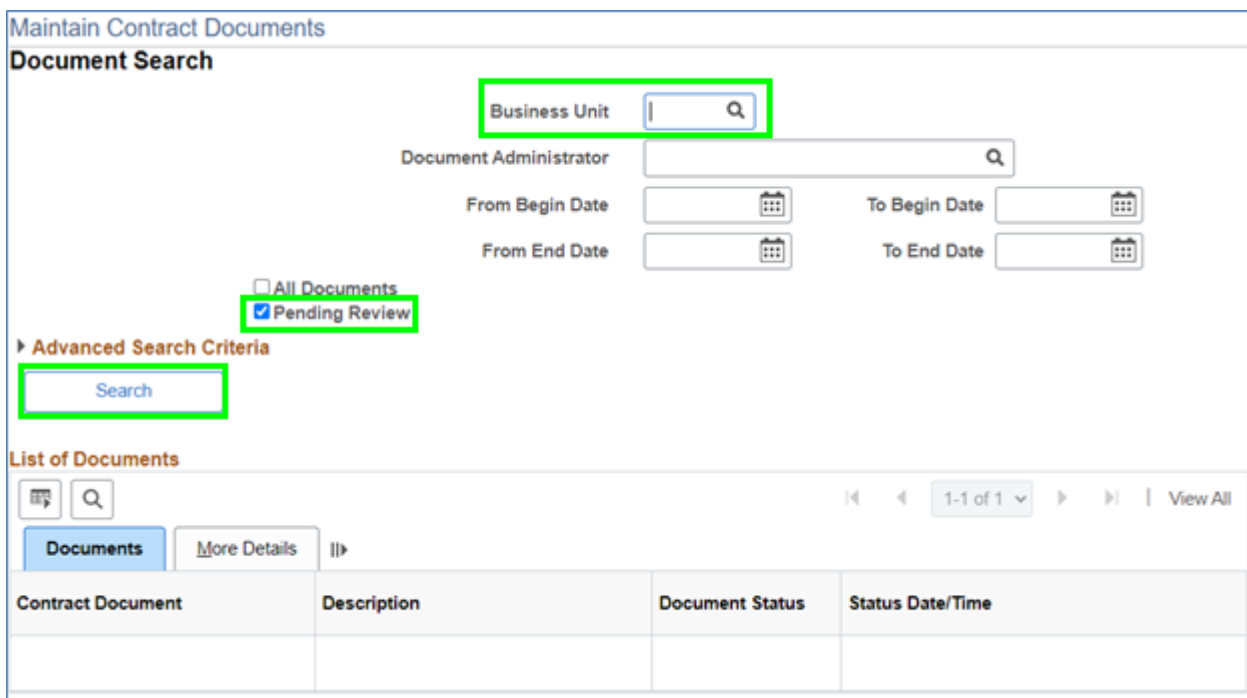



Step	Action
1.	<p>Preferred Navigation: Click the Grant Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > Manage Contracts > Maintain Contract Documents</p> <p>Note: You must log in to the SFS Vendor Portal to view a grant contract.</p>

SFS Handbook: Grantee Processing in SFS

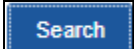


Step	Action
2.	Click the Grant Contracts Search tile.



Step	Action
3.	<p>Enter the agency's business unit into the Business Unit field or click the magnifying glass to search for the information.</p> <p>If you are unsure of the business unit for the State Agency you are doing business with, click the magnifying glass to view a list of business units and state agencies.</p>  <p>Note: If you do not know any criteria, you can leave the search criteria in the Document Search section blank.</p>

SFS Handbook: Grantee Processing in SFS

Step	Action
4.	<p>Verify the Pending Review checkbox is selected.</p> <p>Note: To view grant contracts that are pending review and grant contracts that have previously been approved, verify the All Documents checkbox is selected.</p>
5.	<p>Click the Search button.</p> 

[illegible]

Step	Action
6.	Click the applicable Contract ID from the search results.

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Find Documents

Documents

Begin Date

12/09/2022

Expire Date

12/08/2025

Document Status

Pending Review

Owner

Information Available for Review

Q

	Period Start Date	Period End Date	Period Amount	Budget Detail Period	Budget Detail Status	Budget Detail Review Date	Budget Period Mark as Reviewed	Work Plan Period	Workplan Detail Status
1	12/09/2022	12/08/2023	1,000,000	Period 1	In Process		<input type="checkbox"/>	Period 1	In Process
2	12/09/2023	12/08/2024	2,000,000	Period 2	New		<input type="checkbox"/>	Period 2	New

Comments History

Comments

Approve

Deny

Pushback

View Document

No Attachments/Related Documents Exist

Send E-Mail

View Executed Documents

Previous in List


Next in List

Step	Action
7.	Click the View Document button to review the Contract Agreement document. <div>View Document</div>

SFS Handbook: Grantee Processing in SFS

STATE OF NEW YORK MASTER CONTRACT FOR GRANTS FACE PAGE

STATE AGENCY (Name & Address): Office of Mental Health 44 Holland Avenue Albany, NY 12229	BUSINESS UNIT/DEPT ID: OMH01 1100206 CONTRACT NUMBER: OMH01-00124GM-1100206 CONTRACT TYPE:
CONTRACTOR NAME: STAPLES INC	TRANSACTION TYPE: New
	PROJECT NAME:
CONTRACTOR IDENTIFICATION NUMBERS: NYS Vendor ID Number: 1000053985 Federal Tax ID Number:	CFDA NUMBER (Federally Funded Grants Only):
CONTRACTOR PRIMARY MAILING ADDRESS: PO BOX 415256 DEPT ROC BOSTON, MA 02241-5256 CONTRACTOR PAYMENT ADDRESS: <input checked="" type="checkbox"/> Check if same as primary mailing address CONTRACTOR MAILING ADDRESS: <input checked="" type="checkbox"/> Check if same as primary mailing address	CONTRACTOR STATUS: <input type="checkbox"/> For Profit <input type="checkbox"/> Municipality <input type="checkbox"/> Tribal Nation <input type="checkbox"/> Individual <input type="checkbox"/> Not-For- Profit Charities Registration Number: Exemption Status/Code: <input type="checkbox"/> Sectarian Entity

Step	Action
8.	When you are finished reviewing the Contract Agreement document, click the Close (X) button. 
9.	You have successfully completed the Preview Contract Agreement topic.

Update Contract Period Budget and Work Plan Information and Complete Review of a Contract during Collaboration

Topic Description:

This topic provides the knowledge and skills to review and update budget and work plan information on a contract. This topic also shows how to complete the review of a contract during the collaboration phase. After grantee collaboration is complete, the contract will route back to the agency to complete the collaboration stage. Once the collaboration stage is complete, the contract will route to the grantee for signature.

Topic Objectives:

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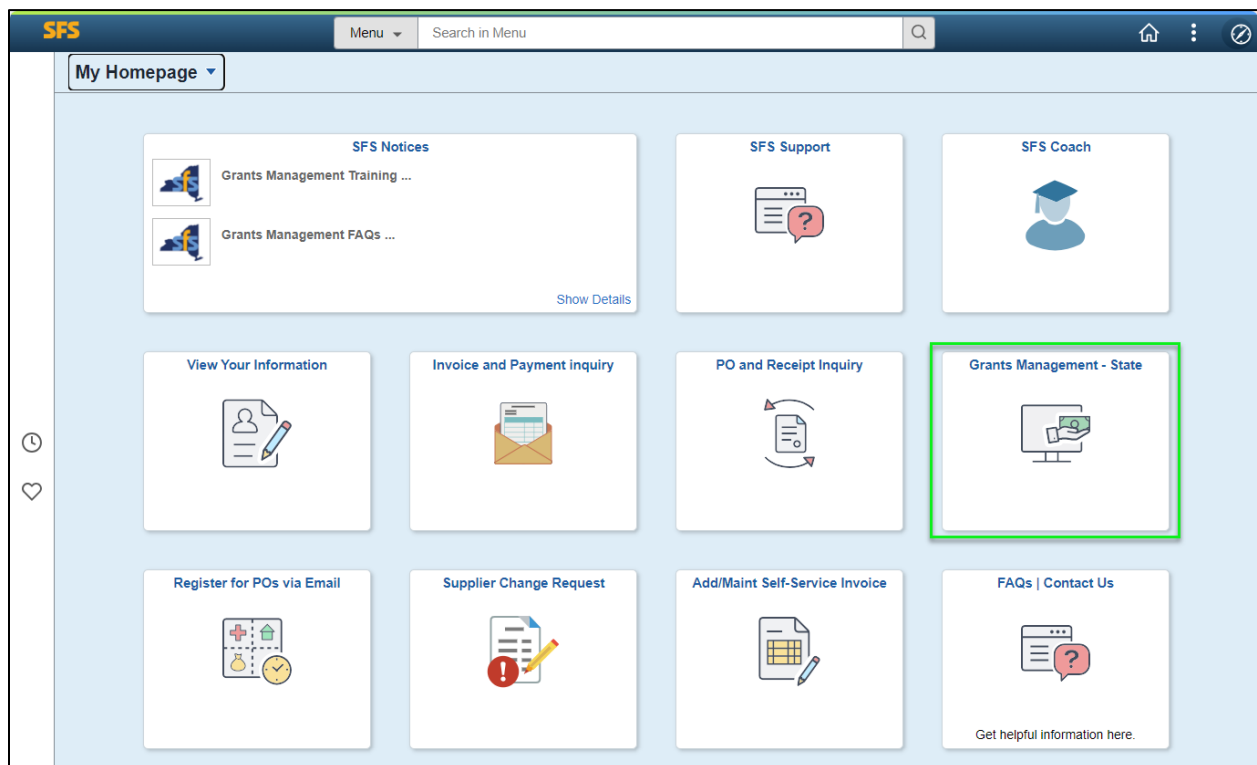
In this topic, you will learn:

- How to review and update the budget and work plan information on a contract
- How to complete review of a contract during collaboration

Procedure

Scenario: You have reviewed a Contract Agreement and determined that the budget and work plan information need to be updated. After updating the budget and work plan information, you will indicate your review is complete for the contract.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

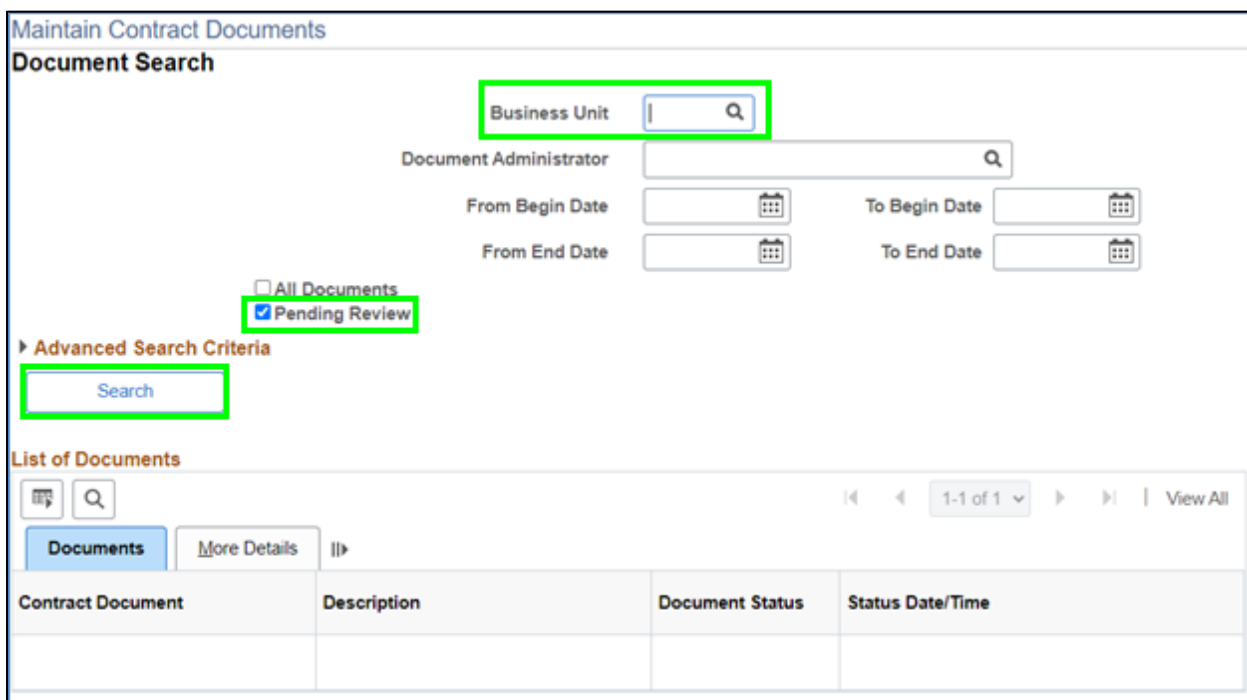



Step	Action
1.	<p>Preferred Navigation: Click the Grant Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > Manage Contracts > Maintain Contract Documents</p> <p>Note: You must log in to the SFS Vendor Portal to update grant contract information.</p>

SFS Handbook: Grantee Processing in SFS



Step	Action
2.	Click the Grant Contracts Search tile.



Step	Action
3.	<p>Enter the agency's business unit into the Business Unit field or click the magnifying glass to search for the information.</p> <p>If you are unsure of the business unit for the State Agency you are doing business with, click the magnifying glass to view a list of business units and state agencies.</p> 
4.	Verify the Pending Review checkbox is selected.
5.	Click the Search button.

SFS Handbook: Grantee Processing in SFS

[illegible]

Step	Action
6.	Click the applicable Contract ID link from the search results under the Contract Document column. <div> Contract Document </div>

[illegible]

SFS Handbook: Grantee Processing in SFS

Step	Action
7.	<p>Click the View Document button to review the Contract Agreement document if you want to view this information. You may need to scroll to see this button.</p> <p>Note: This is an optional step.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;">View Document</div>

The screenshot shows a web browser window with multiple tabs. The active tab is titled 'AGREEMENT_00'. The page content is titled 'STATE OF NEW YORK MASTER CONTRACT FOR GRANTS FACE PAGE'. The form is structured as follows:

STATE AGENCY (Name & Address): Office of Mental Health 44 Holland Avenue Albany, NY 12229	BUSINESS UNIT/DEPT ID: OMH01 1100206 CONTRACT NUMBER: OMH01-00124GM-1100206 CONTRACT TYPE:
CONTRACTOR NAME: STAPLES INC	TRANSACTION TYPE: New
CONTRACTOR IDENTIFICATION NUMBERS: NYS Vendor ID Number: 1000053985 Federal Tax ID Number:	PROJECT NAME:
CONTRACTOR PRIMARY MAILING ADDRESS: PO BOX 415256 DEPT ROC BOSTON, MA 02241-5256 CONTRACTOR PAYMENT ADDRESS: <input checked="" type="checkbox"/> Check if same as primary mailing address CONTRACTOR MAILING ADDRESS: <input checked="" type="checkbox"/> Check if same as primary mailing address	CONTRACTOR STATUS: <input type="checkbox"/> For Profit <input type="checkbox"/> Municipality <input type="checkbox"/> Tribal Nation <input type="checkbox"/> Individual <input type="checkbox"/> Not-For- Profit Charities Registration Number: Exemption Status/Code: <input type="checkbox"/> Sectarian Entity

Step	Action
8.	<p>When you are finished reviewing the Contract Agreement document, click the Close (X) button.</p>

SFS Handbook: Grantee Processing in SFS

Contract ID: 00000000000000000000118077
 Description: 06H01-001803M-1010215
 Document Administrator: DOE, JOHN
 Approval Start Date: 06/28/2023 9:01AM
 Begin Date: 06/18/2023
 Expire Date: 07/07/2024
 Document Status: Pending Review
 Owner:

▼ Information Available for Review ⓘ

	Period Start Date	Period End Date	Period Amount	Budget Detail Period	Budget Detail Status	Budget Detail Review Date	Budget Period Mark as Reviewed	Work Plan Period	Workplan Detail Status	Work Plan Review Date	Workplan Period Mark as Reviewed
1	06/18/2023	07/07/2024	3,000,000	Period 1	In Process		<input type="checkbox"/>	Period 1	New		<input type="checkbox"/>

Comments History ⓘ

Comments

[Approve](#)
[Deny](#)
[Pushback](#)

[View Document](#)

No Attachments/Related Documents Exist
[Send E-Mail](#)
[View Executed Documents](#)

Step	Action
9.	Review comments in the Comments History field for any specific instructions from the agency prior to navigating to the budget/work plan pages.
10.	Click the applicable Period link under the Budget Detail Period heading to review and edit the budget period detail information.

SFS Handbook: Grantee Processing in SFS

Contract Period Budget

☒ Available for Supplier Updates ?

Contract SetID: SHARE

Contract ID: 000000000000000000118077

Version #: 1

Budget Type: EXPENDITURE

Copy from Contract Period

Contract Period: 1

Period From Date: 08/18/2023

Period To Date: 07/07/2024

Period Amount: 3,000.00

▼ Budget Properties

Apply Match: Allowed at Category Level ▼ ?

Calculate Match: ▼ ?

☐ Include Match Worksheet

☐ Allow Supplier to Add Deliverable/Outcome Rows ?

☐ Use Match

Match % 0.00

Step	Action
11.	Note: When the Available for Supplier Updates option is selected, the grantee can update the budget information. When de-selected, the grantee can only view the budget information.

SFS Handbook: Grantee Processing in SFS

▼ Period Budget Summary

1-10 of 10 View 5

	Budget Category	Grant Funds Requested	Match Funds	Match Funds Calculated	Match % Calculated	Match % Required	Other Funds	Total	Category Details
1	SALARY								
2	FRINGE								
3	CONTRACTUAL								
4	TRAVEL								
5	EQUIPMENT								
6	SPACE/PROPERTY RENT								
7	SPACE/PROPERTY OWN								
8	UTILITIES								
9	OPERATING EXPENSES								
10	OTHER								

Total Match Funds Calculated
0.00

Total Grant Funds Requested
0.00

Total Match Funds
0.00

Total Other Funds
0.00

Grand Total
0.00

OK
Cancel
Apply

Step	Action
12.	<p>Click the Category Details icon, located at the bottom of the page, associated to the budget category to update the budget category detail information. You may need to scroll to see these icons.</p> <p>Note: The Category Detail fields will vary based on the Budget Category.</p>

SFS Handbook: Grantee Processing in SFS

Category Details			
Contract ID	00000000000000000000118077	Contract Version	1
Budget Type	EXPENDITURE	Contract Period	1
Budget Category	FRINGE	Match % Required	
		Match Worksheet	

Category Details











#	Type/Description	Grant Funds	Match Funds	Match %	Other Funds	Total Funds		
1	<input type="text"/>	<input type="text"/>	<input type="text"/>			<input type="text"/>	+	-
Total Grant Funds		0.00						
Total Match Funds		0.00						
Total Other Funds		0.00						
Category Details Totals		0.00						

Narrative

OK
Cancel

Step	Action
13.	In this example, we are updating budget category detail information for the Fringe budget category and Expenditure budget type.
14.	<p>Make the applicable updates to the budget category detail information.</p> <p>In this example, we are increasing the Grant Funds amount for the Fringe budget category, so the total grant funds requested for all the budget categories equals the period amount.</p>
15.	<p>The Narrative field should be used to provide additional details about the information entered for a specific budget category.</p> <p>In this example, we will enter Increased the grant funds amount so total grant funds requested equals the period amount in the Narrative field.</p>
16.	<p>Note:</p> <ul style="list-style-type: none"> The above fields are only available when the Agency who collaborated on the contract has indicated that they are applicable for the contract. If this is not the case, these fields will be greyed out. The Total Funds will automatically calculate based on the sum of the Grant Funds, Match Funds, and Other Funds.
17.	When you are finished entering the Budget Category Detail information, click the OK button.

SFS Handbook: Grantee Processing in SFS

Contract Period Budget									
Budget Category		Grant Funds Requested	Match Funds	Match Funds Calculated	Match % Calculated	Match % Required	Other Funds	Total	Category Details
1	SALARY	3,000.00	500.00				500.00	4,000.00	
2	FRINGE								
3	CONTRACTUAL								
4	TRAVEL								
5	EQUIPMENT								
6	SPACE/PROPERTY RENT								
7	SPACE/PROPERTY OWN								
8	UTILITIES								
9	OPERATING EXPENSES								
10	OTHER								

Total Match Funds Calculated		0.00	Total Grant Funds Requested		3,000.00
			Total Match Funds		500.00
			Total Other Funds		500.00
			Grand Total		4,000.00

Step	Action
18.	Click the Apply button to save your changes.
19.	Click the OK button to return to the Document Management page.

SFS Handbook: Grantee Processing in SFS

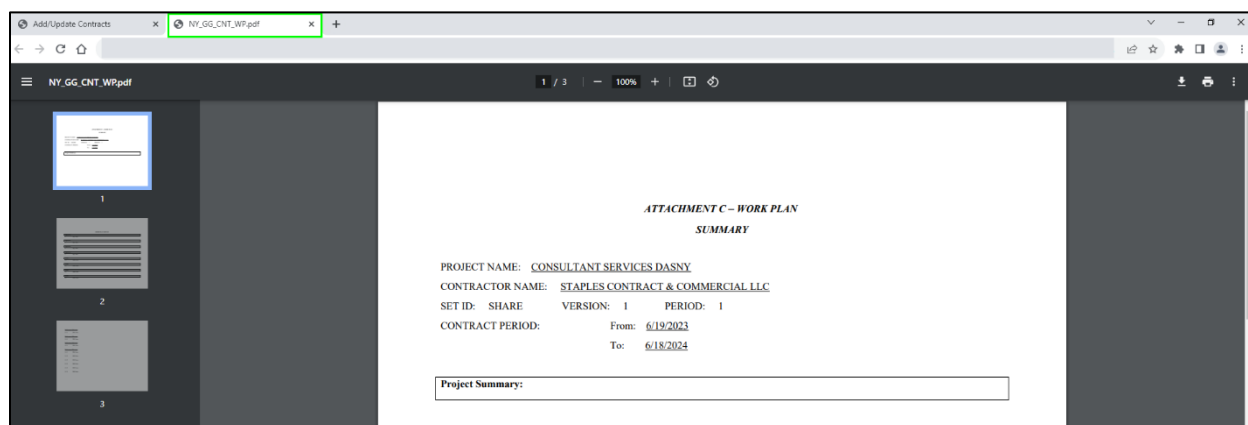
[illegible]

Step	Action
20.	Click the applicable Period link under the Work Plan Period heading to review and edit the work plan information.

[illegible]

SFS Handbook: Grantee Processing in SFS

Step	Action
21.	Note: When the Available for Supplier Updates option is selected, the vendor can update the work plan information. When de-selected, the vendor can only view the work plan information.
22.	<p>If the Allow Supplier Defined Objectives & Tasks box located at the top of the page is checked and the Maximum Number of Objectives, Tasks, and Performance Measures have not already been entered, then you can add new objective, tasks, and performance measures if needed.</p> <p>Select the checkbox for the Objective, Task, and/or Performance Measure where the new objective, task, and/or performance measure will be inserted and then select the + Objective button to add a new objective.</p> <p>Select the + Task button to add a new task and select the + Perf Measure button to add a new performance measure. An objective must be inserted before a task can be inserted and a task must be inserted before a performance measure can be inserted.</p>
23.	<p>Click the Work Plan Overview Report link to view the work plan information in a PDF format, if you are interested in viewing this information.</p> <p>Note: This is an optional step.</p>



Step	Action
24.	When you are finished reviewing the Work Plan Overview Report document, click the Close (X) button.

SFS Handbook: Grantee Processing in SFS

Objectives >> Tasks >> Performance Measures ?

Objective Task Perf. Measure Display Type: All

Basic Info More Details

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
1	Objective	1	Obj1 name	obj1 desc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Task	1.1	task1 name	task1 desc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Performance Measure	1.1.1	PM1 name	PM1 desc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	Performance Measure	1.1.2	PM2 name	PM2 desc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Objective Task Perf. Measure Display Type: All

OK Cancel Apply Refresh

Step	Action
25.	Click the More Details tab.

Objectives >> Tasks >> Performance Measures ?

Objective Task Perf. Measure Display Type: All

Basic Info More Details

Select	Type	Sort Order	Allow Performance Measure	Perf Measure Response Type	Numeric (Target/Goal)	Date	Text/Comment (Target/Goal)
1	Objective	1					
2	Task	1.1	<input checked="" type="checkbox"/>				
3	Performance Measure	1.1.1		Date		09/18/2023	
4	Performance Measure	1.1.2		Numeric	100		

Objective Task Perf. Measure Display Type: All

OK Cancel Apply Refresh

Step	Action
26.	In this example, we are updating the target value for the second performance measure. We will change the Numeric (Target/Goal) field to 50 .
27.	Click the Apply button to save any changes.
28.	Click the OK button to return to the Document Management page.

SFS Handbook: Grantee Processing in SFS

Approval Start Date 08/28/2023 9:01AM
 Begin Date 08/18/2023
 Expire Date 07/07/2024
 Document Status Pending Review
 Owner

Information Available for Review ⓘ

	Period Start Date	Period End Date	Period Amount	Budget Detail Period	Budget Detail Status	Budget Detail Review Date	Budget Period Mark as Reviewed	Work Plan Period	Workplan Detail Status	Work Plan Review Date	Workplan Period Mark as Reviewed
1	08/18/2023	07/07/2024	3,000,000	Period 1	In Process		<input checked="" type="checkbox"/>	Period 1	In Process		<input checked="" type="checkbox"/>

Comments History

Comments

Approve Deny Pushback

View Document

No Attachments/Related Documents Exist
 Send E-Mail
 View Executed Documents

Step	Action
29.	When you have finished reviewing the Budget Period information, select the Budget Period Mark as Reviewed checkbox to update the Budget Detail Status to Reviewed.
30.	When you have finished reviewing the Work Plan Period information, select the Work Plan Period Mark as Reviewed checkbox to update the Work Plan Detail Status to Reviewed.
31.	Enter any comments for the agency in the Comments field. Note: The Comments field could be used summarize the changes you made.
32.	Click the Approve button to indicate your review is complete and to return the contract to the agency.

Mark as Reviewed checked (30001,1114)

Warning! Are you sure you want to mark this contract as reviewed? Once the contract is marked as reviewed, you will be unable to make any further updates and the NYS agency will be notified that this contract has been reviewed. Select Yes to continue with marking this contract as reviewed. Select No to cancel this action.

Yes No

Step	Action
33.	Click the Yes button to continue marking this contract as reviewed. Note: Click the No button to cancel this action.

SFS Handbook: Grantee Processing in SFS

Step	Action
34.	Note: <ul style="list-style-type: none">• If you want to return the contract back to the agency contract manager for updates, click the Deny button.• If you want to return the contract to the previous step in the workflow, click the Pushback button.
35.	You have successfully completed the Update Contract Period Budget and Work Plan Information and Complete Review of a Contract during Collaboration topic.

Apply an Electronic Signature to a Contract Agreement

Topic Description:

This topic provides the knowledge and skills to approve a contract and apply an electronic signature to a contract agreement.

Topic Objectives:

In this topic, you will learn how to:

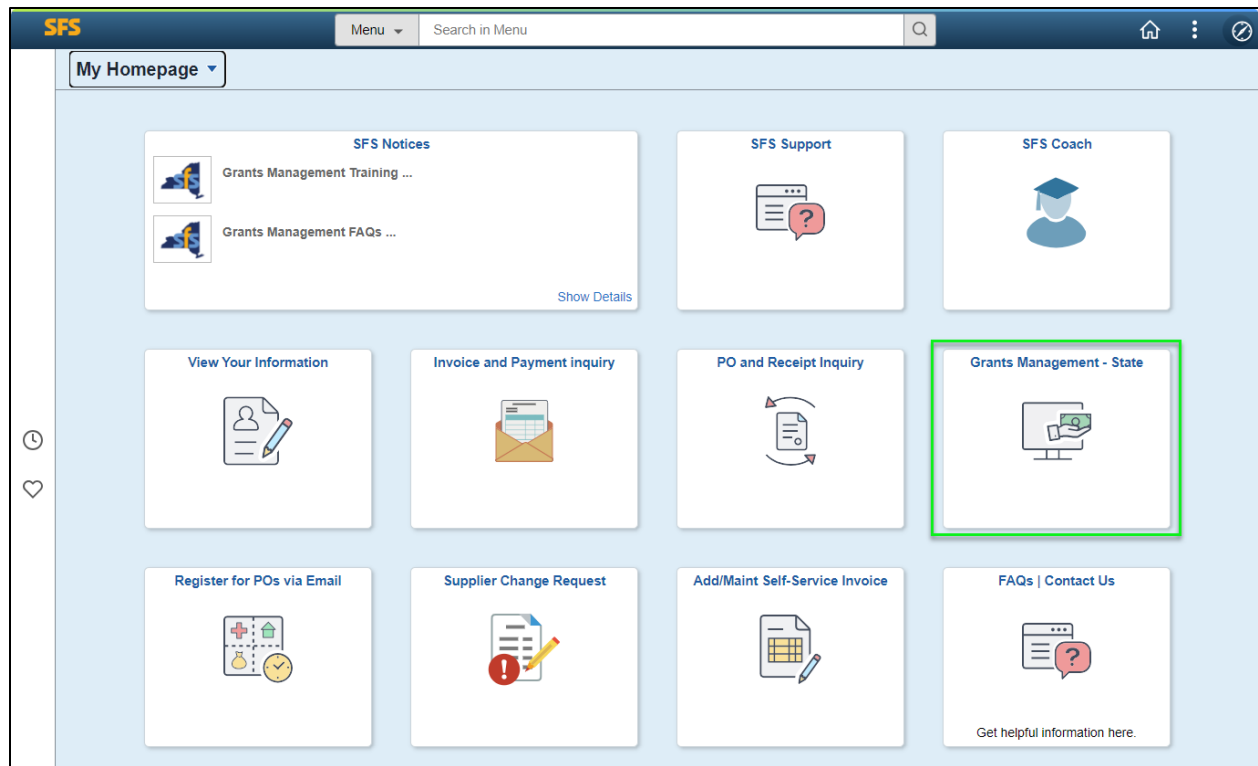
- Approve a Contract
- Apply an Electronic Signature to a Contract Agreement

Procedure

Scenario: You have been awarded a grant contract. You will view the contract agreement that is pending approval and then approve and sign the contract, so it routes to the agency for approval.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

SFS Handbook: Grantee Processing in SFS



Step	Action
1.	<p>Preferred Navigation: Click the Grant Management – State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > Manage Contracts > Maintain Contract Documents</p> <p>Note: You must log in to the SFS Vendor Portal to approve a grant contract.</p>





Step	Action
2.	Click the Grant Contracts Search tile.



SFS Handbook: Grantee Processing in SFS



Maintain Contract Documents

Document Search

Business Unit 

Document Administrator 





From Begin Date  To Begin Date 


From End Date  To End Date 

☐ All Documents
☒ Pending Review



Advanced Search Criteria

List of Documents

  1-1 of 1   View All



Contract Document	Description	Document Status	Status Date/Time

Step	Action
3.	<p>Enter the agency's business unit into the Business Unit field or click the magnifying glass to search for the information.</p> <p>If you are unsure of the business unit for the State Agency you are doing business with, click the magnifying glass to view a list of business units and state agencies.</p>  <p>Note: If you do not know any criteria, you can leave the search criteria in the Document Search section blank.</p>
4.	<p>To view grant contracts that are pending review and approval, verify the Pending Review checkbox is selected.</p> <p>Note: To view grant contracts that are pending review and grant contracts that have previously been approved, verify the All Documents checkbox is selected.</p>
5.	<p>Click the Search button.</p> 

SFS Handbook: Grantee Processing in SFS

Maintain Contract Documents

Document Search

Business Unit

OMH01

Document Administrator

From Begin Date

To Begin Date

From End Date

To End Date

☒ All Documents
☐ Pending Review

Advanced Search Criteria

Search

List of Documents

11-20 of 32

View All

Documents

More Details

Contract Document	Description	Document Status	Status Date/Time
000000000000000000000000117721	OMH01-C00109GM-3650732	Pending Approval	

Step	Action
6.	Click the applicable Contract ID from the search results.

Find Documents

Documents

Contract Number

OMH01-C00109GM-3650732

Contract ID

00000000000000000000117721

Description

OMH01-C00109GM-3650732

Document Administrator

DOE_JOHN

Approval Start Date

02/15/2023 3:43PM

Begin Date

02/15/2023

Expire Date

02/15/2025

Document Status

Pending Approval

Owner

By clicking the **'Approve'** button, I, acting in the capacity as Contractor, certify that I am the signing authority, or have been delegated or designated formally as the signing authority for the appropriate authority or official, and as such I do agree, and I have the authority to agree, to all of the terms and conditions set forth in the Master Contract, including all appendices and attachments. I understand that (i) payment of a claim on this Master Contract is conditioned upon the Contractor's compliance with all applicable conditions of participation in this program and (if I am acting in the capacity as a not-for profit Contractor) the accuracy and completeness of information submitted to the State of New York through the **SFS** vendor prequalification process and (ii) by electronically indicating my acceptance of the terms and conditions of the Master Contract. I certify that (a) to the extent that the Contractor is required to register and/or file reports with the Office of the Attorney General's Charities Bureau ("Charities Bureau"), the Contractor's registration is current, all applicable reports have been filed, and the Contractor has no outstanding requests from the Charities Bureau relating to its filings and (b) all data and responses in the application submitted by the Contractor are true, complete and accurate. I also understand that use of my assigned User ID and Password on the State's contract management system is equivalent to having placed my signature on the Master Contract and that I am responsible for any activity attributable to the use of my User ID and Password. Additionally, any information entered will be considered to have been entered and provided at my direction. I further certify and agree that the Contractor agrees to waive any claim that this electronic record or signature is inadmissible in court, notwithstanding the choice of law provisions.

Approve

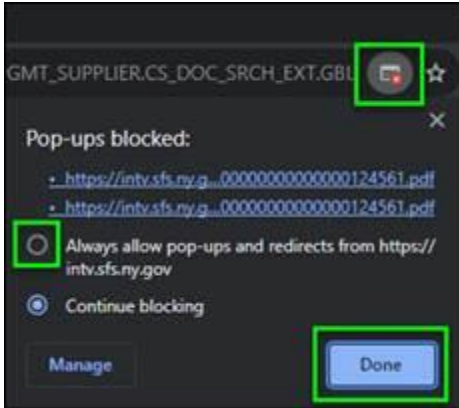
Deny

View Approvals

View Contract Agreement

No Attachments/Related Documents Exist
Send E-Mail
View Executed Documents

SFS Handbook: Grantee Processing in SFS


Step	Action
7.	<p>Click the View Contract Agreement button to view the Contract Agreement in a new browser window.</p> <p>View Contract Agreement</p>
8.	<p>Note: If you do not see this popup, it may be blocked by your browser. Please click the blocked popup icon in the address bar, select the option to “Always allow pop-ups and redirects from https://esupplier.sfs.ny.gov/psp/fscm/SUPPLIER/?cmd=login” and click the Done button. Following this, click the View Contract Agreement button again to view the new browser window.</p> 

SFS Handbook: Grantee Processing in SFS

SFS Intranet - H: x SFS Intranet - H: x SFS Intranet - H: x Documents x AGREEMENT_00 x

STATE OF NEW YORK MASTER CONTRACT FOR GRANTS FACE PAGE

STATE AGENCY (Name & Address): Office of Mental Health 44 Holland Avenue Albany, NY 12229	BUSINESS UNIT/DEPT ID: OMH01 1100206 CONTRACT NUMBER: OMH01-00124GM-1100206 CONTRACT TYPE:
CONTRACTOR NAME: STAPLES INC	TRANSACTION TYPE: New
	PROJECT NAME:
CONTRACTOR IDENTIFICATION NUMBERS: NYS Vendor ID Number: 1000053985 Federal Tax ID Number:	CFDA NUMBER (Federally Funded Grants Only):
CONTRACTOR PRIMARY MAILING ADDRESS: PO BOX 415256 DEPT ROC BOSTON, MA 02241-5256 CONTRACTOR PAYMENT ADDRESS: <input checked="" type="checkbox"/> Check if same as primary mailing address CONTRACTOR MAILING ADDRESS: <input checked="" type="checkbox"/> Check if same as primary mailing address	CONTRACTOR STATUS: <input type="checkbox"/> For Profit <input type="checkbox"/> Municipality <input type="checkbox"/> Tribal Nation <input type="checkbox"/> Individual <input type="checkbox"/> Not-For- Profit Charities Registration Number: Exemption Status/Code: <input type="checkbox"/> Sectarian Entity

Step	Action
9.	When you are finished reviewing the Contract Agreement document, click the Close (X) button. 

SFS Handbook: Grantee Processing in SFS

<

Find Documents

Documents

Contract Number

OMH01-C00109GM-3650732

Contract ID

00000000000000000000117721

Description

OMH01-C00109GM-3650732

Document Administrator

DOE,JOHN

Approval Start Date

02/15/2023 3:43PM

Begin Date

02/15/2023

Expire Date

02/15/2025

Document Status

Pending Approval

Owner

By clicking the '**Approve**' button, I, acting in the capacity as Contractor, certify that I am the signing authority, or have been delegated or designated formally as the signing authority by the appropriate authority or official, and as such I do agree, and I have the authority to agree, to all of the terms and conditions set forth in the Master Contract, including all appendices and attachments. I understand that (i) payment of a claim on this Master Contract is conditioned upon the Contractor's compliance with all applicable conditions of participation in this program and (if I am acting in the capacity as a not-for profit Contractor) the accuracy and completeness of information submitted to the State of New York through the SFS vendor prequalification process and (ii) by electronically indicating my acceptance of the terms and conditions of the Master Contract. I certify that (a) to the extent that the Contractor is required to register and/or file reports with the Office of the Attorney General's Charities Bureau ('Charities Bureau'), the Contractor's registration is current, all applicable reports have been filed, and the Contractor has no outstanding requests from the Charities Bureau relating to its filings and (b) all data and responses in the application submitted by the Contractor are true, complete and accurate. I also understand that use of my assigned User ID and Password on the State's contract management system is equivalent to having placed my signature on the Master Contract and that I am responsible for any activity attributable to the use of my User ID and Password. Additionally, any information entered will be considered to have been entered and provided at my direction. I further certify and agree that the Contractor agrees to waive any claim that this electronic record or signature is inadmissible in court, notwithstanding the choice of law provisions.


Approve

Deny

View Approvals

View Contract Agreement

No Attachments/Related Documents Exist
Send E-Mail
View Executed Documents

Step	Action
10.	Click the Approve button. 

SFS Handbook: Grantee Processing in SFS

< Find Documents

Documents

Contract Number OMH01-C00109GM-3650732
Contract ID 00000000000000000000117721
Description OMH01-C00109GM-3650732
Document Administrator DOE,JOHN
Approval Start Date 02/15/2023 3:43PM
Begin Date 02/15/2023
Expire Date 02/15/2025
Document Status Pending Approval
Owner

By clicking the '**Approve**' button, I, acting in the capacity as Contractor, certify that I am the signing authority, or have been delegated or designated formally as the signing authority by the appropriate authority or official, and as such I do agree, and I have the authority to agree, to all of the terms and conditions set forth in the Master Contract, including all appendices and attachments. I understand that (i) payment of a claim on this Master Contract is conditioned upon the Contractor's compliance with applicable laws and regulations governing public procurement processes and (ii) by electronically executing this agreement, the Contractor certifies that it is duly authorized to execute this contract on behalf of itself as a contractor (not-for-profit Contractor) the accuracy of its registration information, that its registration is current, all applicable registrations are maintained up-to-date, and that it has provided complete and truthful information in its filings and (b) all data and responses submitted through the system shall remain confidential and may be used for assigned User ID and Password verification purposes.

I acknowledge that I am responsible for any activity performed under my account after my login details have been entered and provided to me, and I warrant that no other person will attempt to impersonate my signature is inadmissible in court.

Comments History

[STAPLES 2023-05-23-15:24 08:00] Denied.

Comments

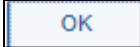
Contract Agreement Approved by Vendor.

Approve Deny

View Approvals

View Contract Agreement

No Attachments/Related Documents Exist
[Send E-Mail](#)
[View Executed Documents](#)

Step	Action
11.	<p>The Title page appears. Enter the Title you wish to display in the signature block within the agreement. This should be your official title at your organization (e.g., President).</p> <p>Note: Once you enter a title the first time, the title you entered the previous time will be displayed by default the next time you sign an agreement in SFS. If your title has changed, then update the value.</p>
12.	<p>Click the OK button.</p> 

SFS Handbook: Grantee Processing in SFS

The screenshot shows the 'Documents' page in the SFS system. It displays contract information for Contract Number OMH01-C00109GM-3650732 and Contract ID 000000000000000000000000117721. The document administrator is DOE, JOHN. The approval start date is 02/15/2023 3:43PM, and the document status is 'Pending Approval'. A large text block contains a legal disclaimer and certification statement. At the bottom left, there is a button labeled 'View Contract Agreement'. On the right, there are links for 'No Attachments/Related Documents Exist', 'Send E-Mail', and 'View Executed Documents'.

Step	Action
13.	Click the View Contract Agreement button.

The screenshot shows the 'View Contract Agreement' page. It displays the same legal disclaimer and certification statement as the previous screenshot. Below the text, there are signature fields for the Contractor, Attorney General, and State Comptroller. The Contractor's signature field is highlighted with a green box, showing the name 'John Doe', title 'Deputy Director', and date '05/23/2023'. The Attorney General's and State Comptroller's signature fields are also visible, each with 'By:' and 'Printed Name' labels.

Step	Action
14.	The Title , Date , and Signature of the Approval display on the Contract Agreement.

SFS Handbook: Grantee Processing in SFS

is conditioned upon the Contractor's compliance with all applicable conditions of participation in this program and (if I am acting in the capacity as a not-for profit Contractor) the accuracy and completeness of information submitted to the State of New York through the Gateway vendor prequalification process and (ii) by electronically Master Contract, I certify that (a) to the extent that the Contractor is required to register and/or file reports with the Office of the Attorney General's Charities Bureau ("Charities Bureau"), the Contractor's registration is current, all applicable reports have been filed, and the Contractor has no outstanding requests from the Charities Bureau relating to its filings and (b) all data and response in the application submitted by the Contractor are true, complete and accurate. I also understand that use of my assigned User ID and Password on the State's contract management system is equivalent to having placed my signature on the Master Contract and that I am responsible for any activity attributable to the user of my User ID and Password. Additionally, any information entered will be considered to have been entered and provided at my direction. I further certify and agree that the Contractor agrees to waive any claim that this electronic record or signature is inadmissible in court, notwithstanding the choice of law provisions.

CONTRACTOR: STAPLES CONTRACT & COMMERCIAL LLC

By: John Doe
Printed Name

Title: Deputy Director


Date: 05/23/2023

ATTORNEY GENERAL'S SIGNATURE
APPROVED AS TO FORM

By: _____

STATE COMPTROLLER'S SIGNATURE

By: _____

Step	Action
15.	Click the Close (X) button. 

SFS Handbook: Grantee Processing in SFS

[illegible]

Step	Action
16.	Click the Document button or the Home Button, to navigate away from the Maintain Contract Documents page.
17.	You have successfully completed the Apply an Electronic Signature to a Contract Agreement topic.

Complete Performance Measures for a Progress Report and Submit a Progress Report for Agency Review

Topic Description:

This topic provides the knowledge and skills to complete performance measures for a progress report and then submit a progress report for agency review and approval.

Progress reporting is a tool that measures the progress of the grant contract over its lifetime in SFS.

Topic Objectives:

In this topic, you will learn:

- How to update and complete Performance Measures for a Progress Report
- Submit a Progress Report for Agency Review and Approval

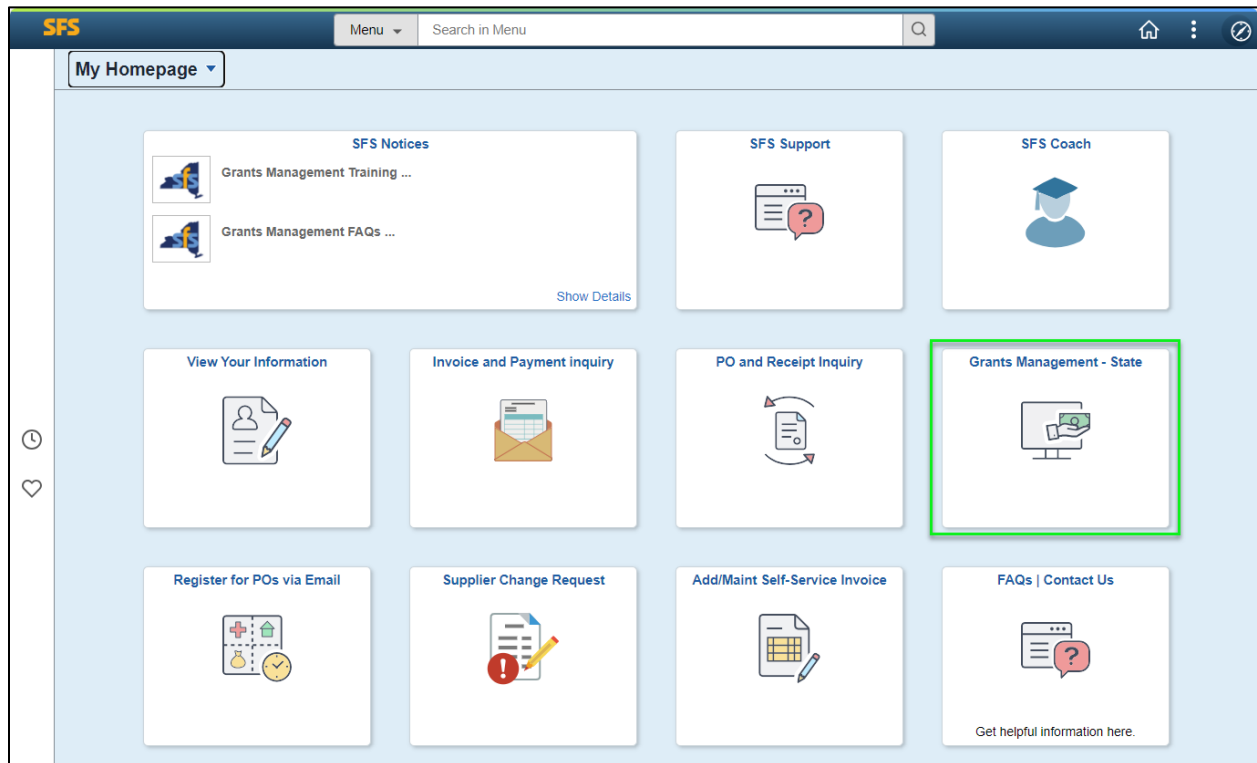
Procedure

Scenario: Your grant contract has been approved and you are performing the work that is outlined in the contract agreement. As a Grantee User, it is time for you to complete

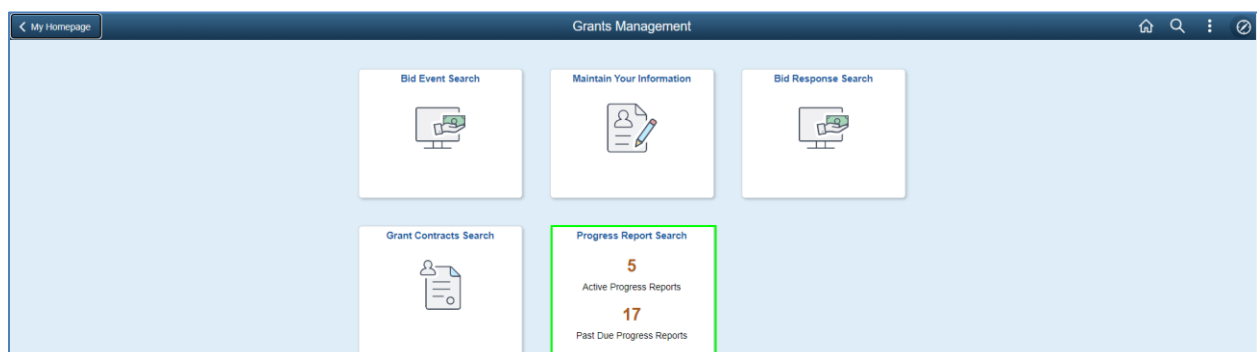
SFS Handbook: Grantee Processing in SFS

performance measures on a progress report and then submit the progress report for agency review and approval.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

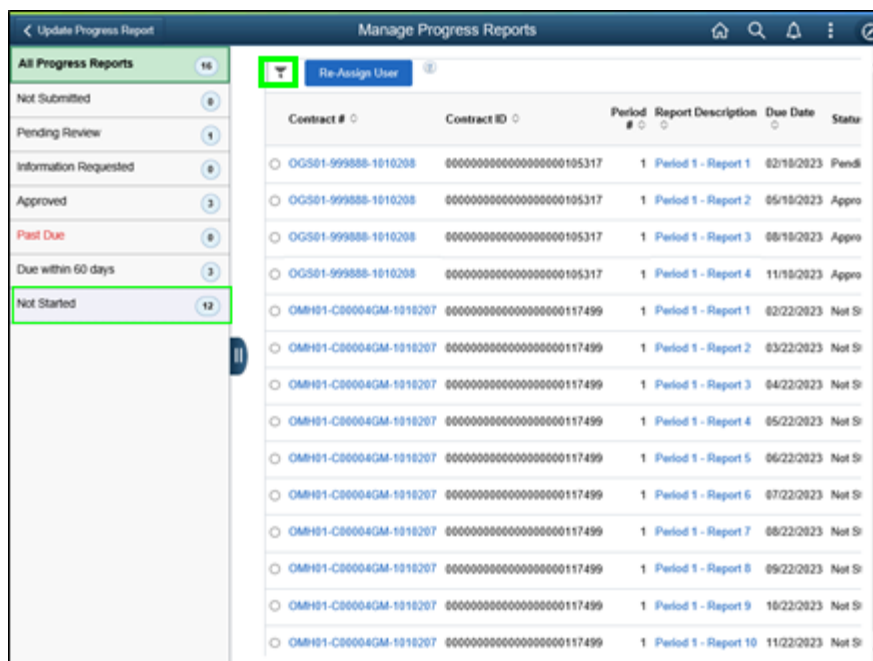



Step	Action
1.	<p>Preferred Navigation: Click the Grant Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > Manage Contracts > Manage Progress Reports</p> <p>Note: You must log in to the SFS Vendor Portal to submit a progress report.</p>



SFS Handbook: Grantee Processing in SFS

Step	Action
2.	Click the Progress Report Search tile.



Step	Action
3.	The Manage Progress Reports search page is displayed with a default list of All Progress Reports available.
4.	Select the status tab on the left to display progress reports for an applicable view. Click the Not Started tab.
5.	Click the Filter icon to narrow down the number of progress reports that display. 

SFS Handbook: Grantee Processing in SFS

Cancel

Filter

Done

Contract #

Contract ID

Period #

Report ID

Report Description

Status

Due Date From

Due Date To

Business Unit

Project Name

User Assigned

Supplier ID

Supplier Name

Clear

Step	Action
6.	<p>Enter the applicable values in the Search Criteria fields or click the magnifying glass icon to search for the information.</p> <p>Note:</p> <ul style="list-style-type: none">• In order to search by Report Description, a Contract ID must be entered or selected first.• In order to search by Project Name, a Business Unit must be entered or selected first.
7.	<p>Click the Done button.</p> <p>In this example, we will not filter the progress reports.</p>

SFS Handbook: Grantee Processing in SFS

[illegible]

Step	Action
8.	<p>To re-assign a different grantee user to save and submit the progress report follow these steps:</p> <ul style="list-style-type: none"> • Select the applicable progress report. • Click the Re-Assign User button at the top of the page. • Select the User ID to re-assign. • Click the Assign Supplier User button. <p>Note: This is an optional step.</p>

SFS Handbook: Grantee Processing in SFS

< Update Progress Report

Manage Progress Reports

All Progress Reports16

Not Submitted0

Pending Review1

Information Requested0

Approved3

Past Due0

Due within 60 days3

Not Started12

Re-Assign User?

Contract #	Contract ID	Period #	Report Description	Due Date	Status
OMH01-C00004GM-1010207	00000000000000000000117499	1	Period 1 - Report 1	02/22/2023	Not Star
OMH01-C00004GM-1010207	00000000000000000000117499	1	Period 1 - Report 2	03/22/2023	Not Star
OMH01-C00004GM-1010207	00000000000000000000117499	1	Period 1 - Report 3	04/22/2023	Not Star
OMH01-C00004GM-1010207	00000000000000000000117499	1	Period 1 - Report 4	05/22/2023	Not Star
OMH01-C00004GM-1010207	00000000000000000000117499	1	Period 1 - Report 5	06/22/2023	Not Star
OMH01-C00004GM-1010207	00000000000000000000117499	1	Period 1 - Report 6	07/22/2023	Not Star
OMH01-C00004GM-1010207	00000000000000000000117499	1	Period 1 - Report 7	08/22/2023	Not Star
OMH01-C00004GM-1010207	00000000000000000000117499	1	Period 1 - Report 8	09/22/2023	Not Star
OMH01-C00004GM-1010207	00000000000000000000117499	1	Period 1 - Report 9	10/22/2023	Not Star
OMH01-C00004GM-1010207	00000000000000000000117499	1	Period 1 - Report 10	11/22/2023	Not Star
OMH01-C00004GM-1010207	00000000000000000000117499	1	Period 1 - Report 11	12/22/2023	Not Star
OMH01-C00004GM-1010207	00000000000000000000117499	1	Period 1 - Report 12	01/22/2024	Not Star

Step	Action
9.	Select the applicable Report Description link to update and submit the progress report. <div style="border: 1px solid red; padding: 2px; display: inline-block;">Period 1 - Report</div>

[Manage Progress Reports](#)

Update Progress Report

[New Window](#)
[Personalize Page](#)

contract #

OMH01-C00004GM-1010207

Report ID

Period 1 - Report 1

Period #

1

Report Period From

01/21/2023

Agency Name

Office of Mental Health

Report Period To

02/28/2023

Status

Not Started

Due Date

02/22/2023

[View Associated Work Plan](#)

Performance Measures

1-1 of 1

Objective Number	Objective Name	Task Number	Task Name	Performance Measure Number	Performance Measure Name	Response Type	Comment (Target/Goal)
1	test objective	1.1	test task	1.1.1	test performance measure	Text/Comment	View Text/Comment

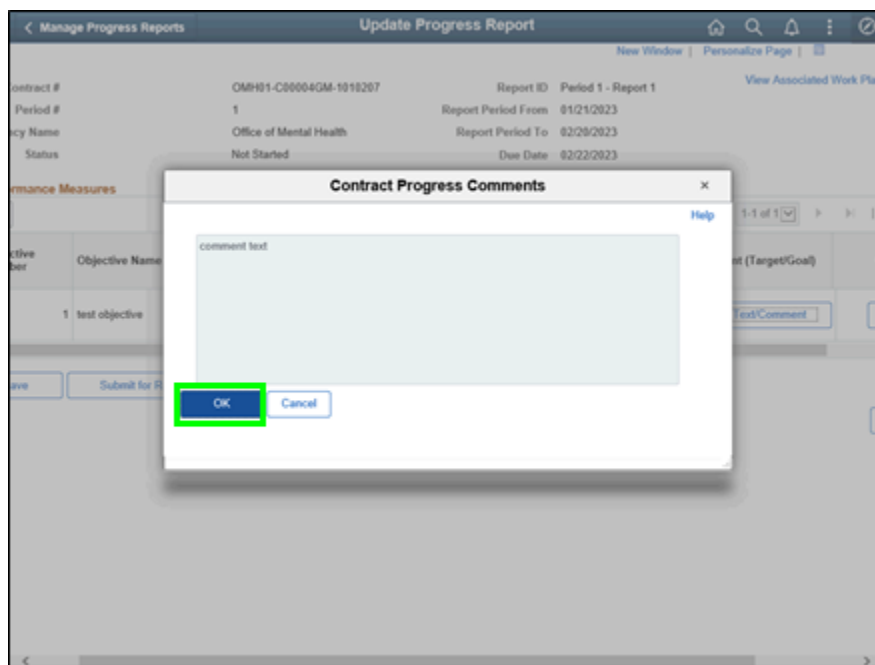
Save

Submit for Review

Cancel

SFS Handbook: Grantee Processing in SFS

Step	Action
10.	<p>Note: There are five Performance Measure Response Types that could be included on a progress report. They are as follows:</p> <ul style="list-style-type: none"> • Attachment • Text/Comment • Numeric • Date • Yes/No <p>In this example, the Text/Comment response type is used on the progress report.</p>
11.	<p>To view any comments on the Target/Goal, click the View Text/Comment button.</p> <div style="border: 1px solid red; padding: 5px; display: inline-block;">View Text/Comment</div> <p>Note: The View Text/Comment button will only display for the Text/Comment response type.</p>



Step	Action
12.	<p>Click the OK button to return to the previous page.</p> <div style="border: 1px solid black; padding: 5px; display: inline-block;">OK</div>

SFS Handbook: Grantee Processing in SFS

Update Progress Report

OMH01-C00004GM-1010207 Report ID Period 1 - Report 1 [View Associated Work Plan](#)

1 Report Period From 01/21/2023

Office of Mental Health Report Period To 02/20/2023

Not Started Due Date 02/22/2023

1-1 of 1 | View All

Task Name	Performance Measure Number	Performance Measure Name	Response Type	Comment (Target/Goal)	Comment Response
test task	1.1.1	test performance measure	Text/Comment	View Text/Comment	Enter Text/Comment


[or Review](#) [Cancel](#) [Return](#)

Step	Action
13.	<p>Click the Enter Text/Comment response button.</p> <div> Enter Text/Comment </div> <p>Note: The Enter Text/Comment button will only display for the Text/Comment response type.</p>

Contract Progress Comments

OK Cancel

SFS Handbook: Grantee Processing in SFS

Step	Action
14.	Enter the applicable value in the Contract Progress Comments box. Note: The Contract Progress Comments field could be used to explain your progress in completing the associated task.
15.	Click the OK button. 



Update Progress Report

Contract # OMH01-C00004GM-1010207 Report ID Period 1 - Report 1 [View Associated](#)

Period # 1 Report Period From 01/21/2023



Agency Name Office of Mental Health Report Period To 02/20/2023

Status Not Started Due Date 02/22/2023

Performance Measures

Objective Name	Task Number	Task Name	Performance Measure Number	Performance Measure Name	Response Type	Comment (Target/Goal)	Comment
test objective	1.1	test task	1.1.1	test performance measure	Text/Comment	View Text/Comment	View Te

[Save](#) [Submit for Review](#) [Cancel](#)

Step	Action
16.	Click the Save button. 
17.	Click the Submit for Review button. 

SFS Handbook: Grantee Processing in SFS

Update Progress Report

Contract # OMH01-C00004GM-1010207 Report ID Period 1 - Report 1 View Associated

Period # 1 Report Period From 01/21/2023

Agency Name Office of Mental Health Report Period To 02/20/2023

Status Not Submitted Due Date 02/22/2023

Performance Measures

Objective Name Task Number Target (Target/Goal) Comment

test objective 1.1

Are you sure you are finished with updating this progress report and it is ready to be submitted for review by the agency?

Once the progress report has been submitted to the agency, you will be unable to make any further updates. Select Yes to continue with sending this progress report to the agency. Select No to cancel this action. (0,0)

Yes No

Save Submit for Review

Step	Action
18.	<p>Click the Yes button to continue sending the progress report to the agency for review and approval.</p> <p>Note: Click the No button to cancel this action which allows you to return to the progress report to make additional edits prior to submitting to the agency.</p>
19.	<p>You have successfully completed the Complete Performance Measures for a Progress Report and Submit a Progress Report for Agency Review topic.</p>

Update and Re-submit a Returned Progress Report

Topic Description:

This topic provides the knowledge and skills to update and re-submit a progress report that was returned by the agency requesting additional information.

Topic Objectives:

In this topic, you will learn:

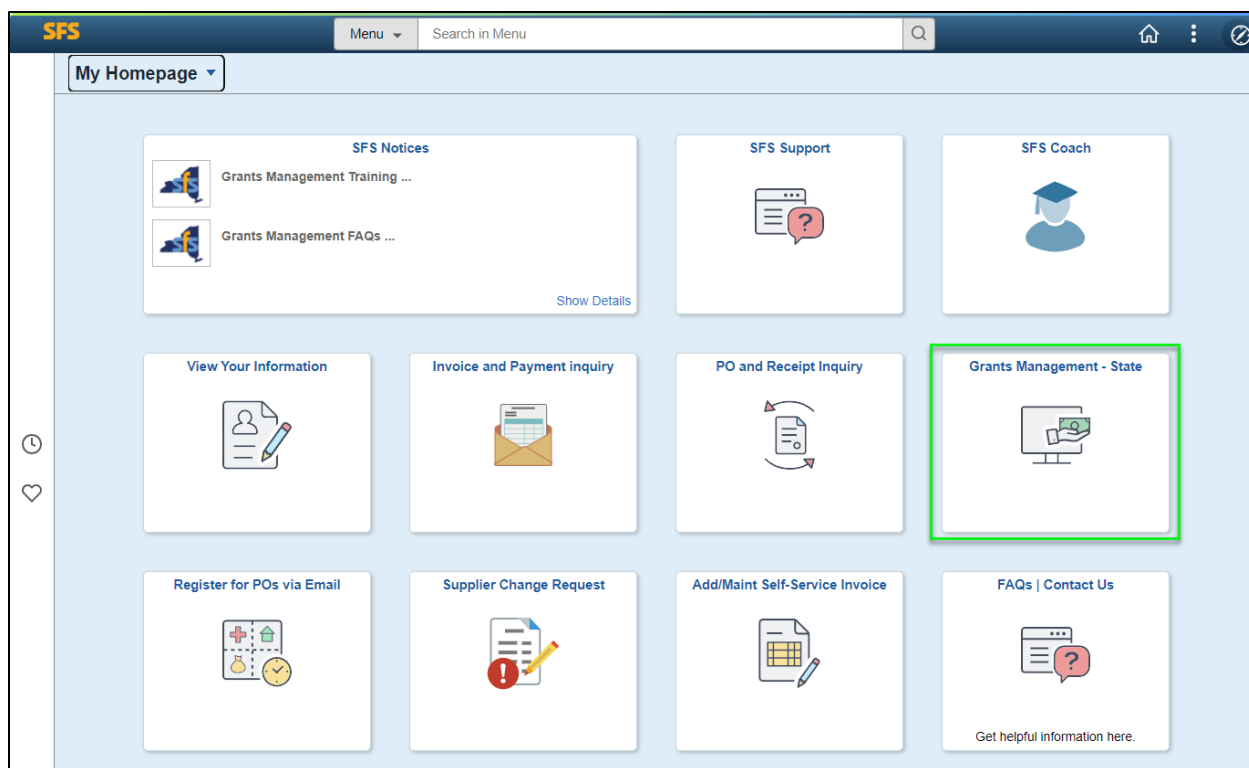
- How to update and re-submit a returned progress report.

Procedure

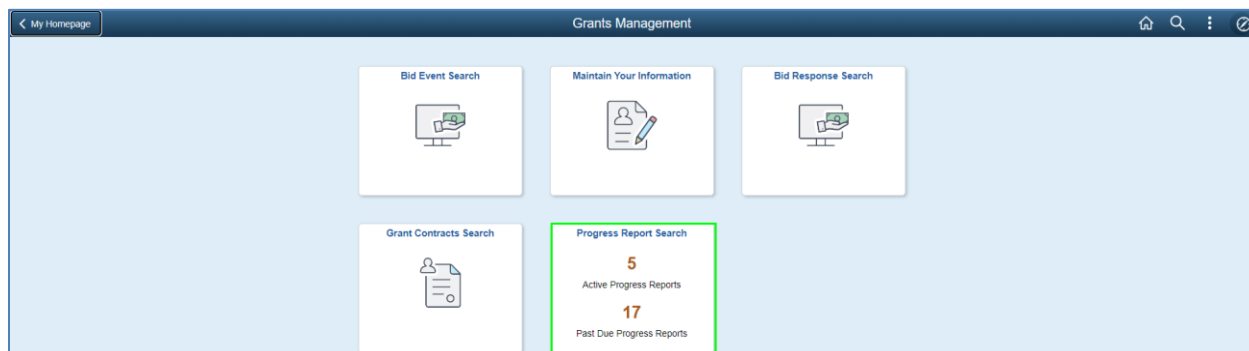
Scenario: You previously submitted a progress report to the agency for review and the agency has returned the progress report to you requesting additional information. You will update and re-submit a progress report that was returned by the agency requesting additional information.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

SFS Handbook: Grantee Processing in SFS



Step	Action
1.	<p>Preferred Navigation: Click the Grant Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > Manage Contracts > Manage Progress Reports.</p> <p>Note: You must log in to the SFS Vendor Portal to update and re-submit a progress report.</p>



Step	Action
2.	Click the Progress Report Search tile.

SFS Handbook: Grantee Processing in SFS

Step	Action
3.	The Manage Progress Reports search page is displayed with a default list of All Progress Reports available.
4.	Select the status tab on the left to display progress reports for an applicable view. Click the Information Requested tab.
5.	Select the applicable Report Description link to update and submit the progress report. Period 1 - Report

Step	Action
6.	Click the View Approvals link to view the agencies comment(s) on what they want updated on the progress report.

SFS Handbook: Grantee Processing in SFS

Contract Prog Report Approval

✕

[Help](#)

Contract Prog Report Approval

▼ **Contract Progress Report Status: Pending**

[View/Hide Comments](#)

Contract Report Approval Path

On Hold

Cntrct Report Approver 1
08/27/23 - 8:12 PM

Information Request

Information Request

Not Routed

Multiple Approvers
Cntrct Report Approver 2

▼ **Comments**

08/27/23 - 8:12 PM

Please re-enter integer response

Step	Action
7.	Expand the Comments section to view the comments from the agency.
8.	Click the Close (X) icon in the upper right corner of the page to close the Contract Progress Report Approval page.

Contract # OMH01-C00001GM-1030201

Period # 1

Agency Name Office of Mental Health

Status Information Requested

Report ID Period 1 - Report 5

Report Period From 10/20/2023

Report Period To 01/19/2024

Due Date 01/29/2024

[View Associated Work Plan](#)

[View Approvals](#)

Performance Measures

1-1 of 1 View All

Objective Number	Objective Name	Task Number	Task Name	Performance Measure Number	Performance Measure Name	Response Type	Integer (Target/Goal)	Integer Response
1	perf measure 1 name	1.1.1	perf measure 1 name	1.1.1	perf measure 1 name	Numeric	500	450

Send Comment to Agency

Updated integer response

Save

Resubmit for Review

Cancel

Step	Action
9.	Update the progress report as needed.
	Enter a comment for the agency in the Send Comment to Agency field.

SFS Handbook: Grantee Processing in SFS

Contract #	OMH01-C00001GM-1030201	Report ID	Period 1 - Report 5	View Associated Work Plan
Period #	1	Report Period From	10/20/2023	View Approvals
Agency Name	Office of Mental Health	Report Period To	01/19/2024	
Status	Information Requested	Due Date	01/29/2024	

Performance Measures

Objective Number	Objective Name	Task Number	Task Name	Performance Measure Number	Performance Measure Name	Response Type	Integer (Target/Goal)	Integer Response
1	perf measure 1 name	1.1.1	perf measure 1 name	1.1.1	perf measure 1 name	Numeric	500	450

Send Comment to Agency
Updated integer response

Save Resubmit for Review Cancel

Step	Action
10.	Click the Resubmit for Review button.

Are you sure you are finished with updating this progress report and it is ready to be submitted for review by the agency?

Once the progress report has been submitted to the agency, you will be unable to make any further updates. Select Yes to continue with sending this progress report to the agency. Select No to cancel this action. (0,0)

Yes No

Step	Action
11.	Click the Yes button to continue sending the progress report back to the agency for review and approval. Note: Click the No button to cancel this action which allows you to return to the progress report to make additional edits prior to submitting to the agency.
12.	You have successfully completed the Update and Re-submit a Returned Progress Report topic.

Entering and Maintaining Grant Claims

Lesson Description:

This lesson provides the knowledge and skills to enter and maintain grant claims. Grantees will continue to submit claims against their approved contract budget. Grantees should enter claims into SFS on their own behalf, however, SFS supports the option for agencies to have grantees submit claims offline and designate agency staff to perform proxy entry, certification, and submission of claims on behalf of the grantee.

Claims in SFS can include multiple claim lines – so a claim could include both an advance for one period and a reimbursement for another period.

SFS Handbook: Grantee Processing in SFS

Claims are submitted by selecting a single contract and one or many open contract periods to include in the claim.

In SFS, there are two different formats available to collect claim information against the contract period – Advance/Initial Payment and Reimbursements.

- Advance/Initial Payment enables grantees to enter a request for an advance amount up to the remaining available advanced amount for the contract line.
- Reimbursement enables grantees to enter the requested reimbursement amounts by contract period and budget category.

Grantees are expected to provide supporting information to the claim including Budget Category breakdown/details (Salary detail, etc.).

- Additional details, including receipts and payroll documentation, would be provided via an attachment.

Lesson Objectives:

In this lesson, you will learn how to:

- Enter a New Claim for an Advance/Initial Amount
- Enter a New Claim for Reimbursement Amount
- Update an Existing Claim
- Certify and Submit a Claim
- Review In-Process Claims

Enter a New Claim – Advance/Initial Amount

Topic Description:

This topic provides the knowledge and skills to create and submit an advance/initial payment.

Topic Objective:

In this topic, you will learn:

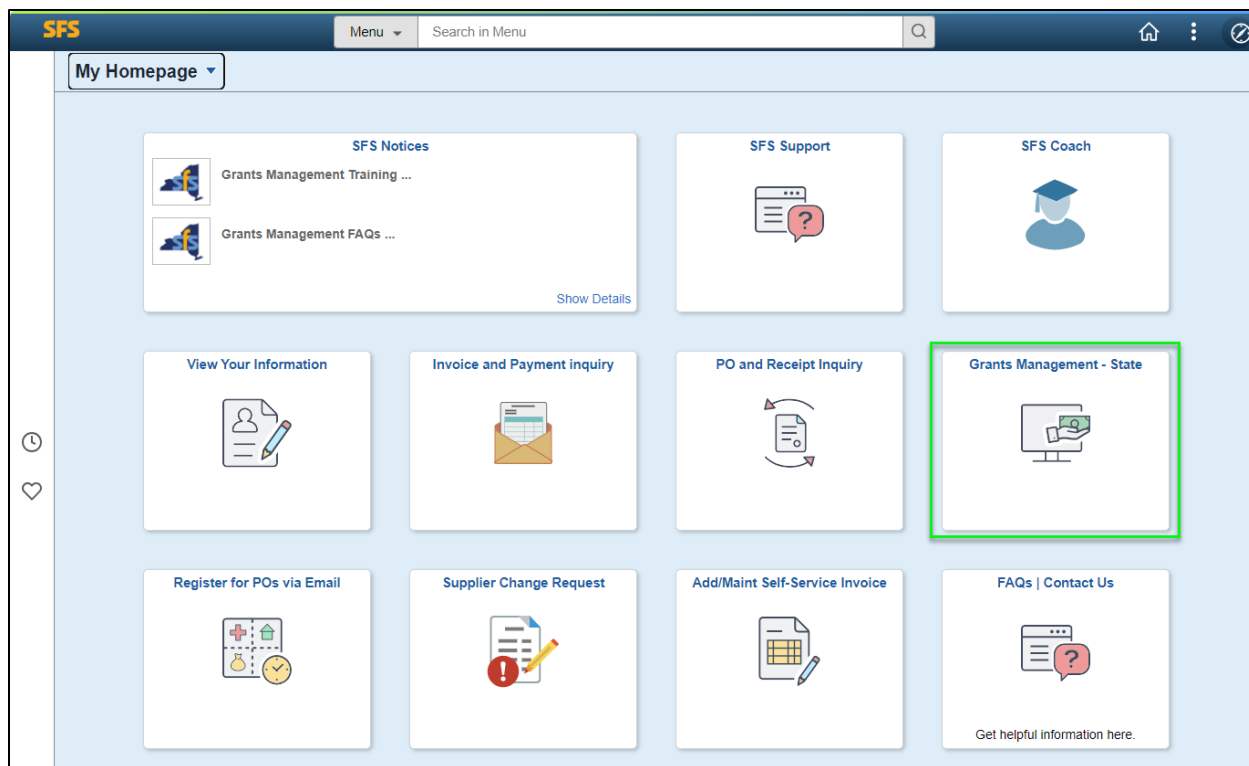
- How to submit a claim for an advance/initial payment

Procedure:

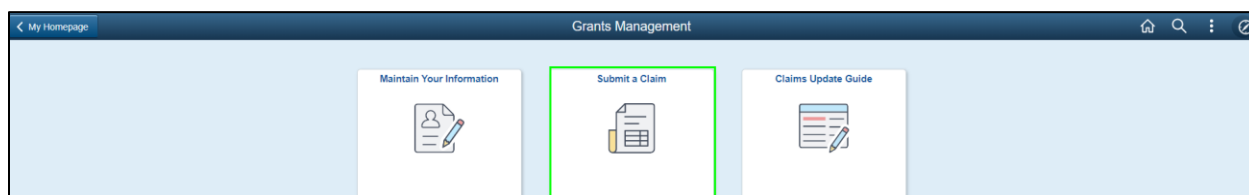
Scenario: You want to submit an advance/initial payment claim on an approved grant contract with remaining funds available.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

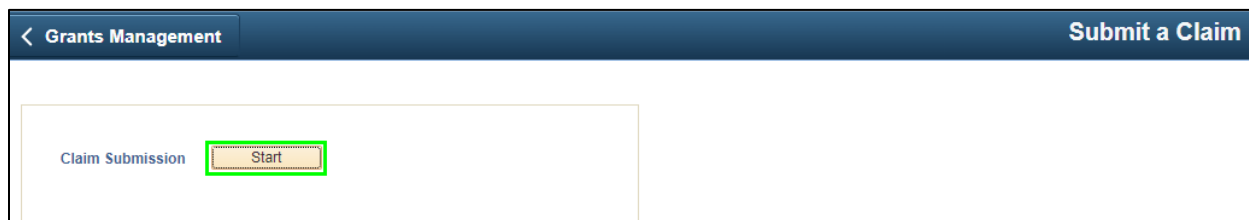
SFS Handbook: Grantee Processing in SFS



Step	Action
1.	<p>Navigation: Click the Grants Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > eSettlements > Submit a Claim.</p> <p>Note: You must log in to the SFS Vendor Portal to enter a claim.</p>



Step	Action
2.	Click the Submit a Claim tile.



SFS Handbook: Grantee Processing in SFS

Step	Action
3.	Click on the Claim Submission Start button.

Claim Entry and Submission

Next >

Business Unit: OMH01 Claim Number: NEXT

If a contract you are searching for is missing from the list, please contact the awarding agency for further information.

Select the contract for the claim that is being entered

Select	Contract ID	Description	NYS Contract#	Begin Date	Expire Date	Agency Name	Contract Total
<input type="checkbox"/>	000000000000000000000000117523	MULTI-PLATE RETHERM	C00014GM	01/24/2023	01/25/2024	OMH01	10,000.00
<input type="checkbox"/>	000000000000000000000000117615	MULTI-PLATE RETHERM	C00014GM	01/24/2023	01/25/2024	OMH01	10,000.00
<input type="checkbox"/>	000000000000000000000000117619	MULTI-PLATE RETHERM	C00014GM	02/01/2023	01/25/2024	OMH01	10,000.00
<input type="checkbox"/>	000000000000000000000000117706	MULTI-PLATE RETHERM	C00014GM	02/06/2023	02/06/2025	OMH01	10,000.00
<input checked="" type="checkbox"/>	000000000000000000000000117744	ENERGY EFFICIENCY REHAB	C00121GM	02/20/2023	02/19/2024	OMH01	10,000.00

Step	Action
4.	A listing of the first five available contracts display. To view more than five contracts, click the View All link.
5.	Click the check box to select the applicable contract.
6.	Click the Next button on the top right-hand corner of the page.

Claim Entry and Submission

Previous Next >

Business Unit: OMH01 Claim Number: NEXT

Enter your organization's reference number for this claim. In addition, please review and update your vendor location if needed.

Contract ID: 000000000000000000000000117744
 Description: OMH01-C00121GM-1000204
 Project Name: 00000000000000000000000012111
 Contract Begin Date: 02/20/2023
 Contract Expire Date: 02/19/2024
 Contract Max Amount: 10,000.00
 Invoice ID: Test12367
 Claim Initiated Date: 10/23/2023

Supplier ID: 1000015490
 Supplier Name: [REDACTED]
 Supplier Location: MAINEPAY [REDACTED]
 217 S SALINA ST
 2ND FL
 SYRACUSE NY 13202

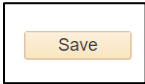

Claim Status: New
 Claim Date: 10/23/2023 [REDACTED]
 Claim Type: Regular

Header Attachments

Save

Step	Action
7.	Verify contract details on the Claim Header page.

SFS Handbook: Grantee Processing in SFS

Step	Action
8.	<p>Vendor Location values can be selected using the Supplier Location magnifying glass icon if needed.</p> <p>Note: Vendor Location is a default set of rules, or attributes, that define how an agency conducts business with a particular grantee. A vendor location comprises information such as payment terms, payment options, pay to bank accounts, etc. Although a vendor location is not an address, it does reference addresses.</p>
9.	<p>Note: Change the Claim Date using the calendar icon if needed. Claim date defaults to the current date.</p>
10.	Enter a unique Invoice ID up to 30 characters in the Invoice ID field.
11.	<p>Click the Save button.</p> 
12.	<p>Click the Next button on the top right corner of the page.</p> 

[X Exit](#)

Claim Entry and Submission

[< Previous](#)
[Next >](#)

Contract Selection
✔ Complete

Claim Header
✔ Complete

Claim Lines
✔ Complete

Claim Line Details
☐ Not Started

Claim Summary
☐ Not Started

Select the Contract Period and Claim Line Type

Business Unit: OMH01 **Claim Number:** 000000458 ❌

Contract ID: 0000000000000000000000117744 Description: OMH01-C00121GM-1000204 Project Name: 000000000012111 Contract Begin Date: 02/20/2023 Contract Expire Date: 02/19/2024 Contract Max Amount: 10,000.00 Invoice ID: Test12367 Claim Initiated Date: 10/23/2023	Supplier ID: 1000016490 Supplier Name: ██████████ Supplier Location: MAINEPAY ██████████ 217 S SALINA ST SYRACUSE NY 13202 Claim Status: In Process Claim Date: 10/23/2023 Claim Type: Regular
---	--

Line Number	*Contract Period	Period From Date	Period To Date	Period Amount	*Line Type	
1	1	02/20/2023	02/19/2024	10,000.00	Initial	+ -

Step	Action
13.	Choose a Contract Period by clicking on the magnifying glass next to the field. Note: You would select the available contract period based on the payment schedule and due date listed on the contract.
14.	Note: Contract Period is a date range defined by the agency where the period from and to dates fall within the contract begin and expire dates. Each period is assigned a sequential number beginning at 1.

SFS Handbook: Grantee Processing in SFS

Step	Action
15.	<p>Note: The Line Type displays values for Advance or Initial Payment, if selected on the approved contract's payment schedule, and Reimbursement. The Reimbursement line type is discussed in the next topic in this lesson.</p> <p>In this example, click the Line Type dropdown menu and select the Initial line type.</p>
16.	Click the Save button.
17.	Click the Next button.

Business Unit: OMH01		Claim Number: 000000458	
Contract ID: 000000000000000000000000117744		Supplier ID: 1000016490	
Description: OMH01-C00121GM-1000204		Supplier Name:	
Project Name: 0000000000001211		Supplier Location: MAINEPAY	
Contract Begin Date: 02/20/2023		SYRACUSE NY 13202 217 S SALINA ST 2ND FL	
Contract Expire Date: 02/19/2024		Claim Status: In Process	
Contract Max Amount: 10,000.00		Claim Date: 10/23/2023	
Invoice ID: Test12367		Claim Type: Regular	
Claim Initiated Date: 10/23/2023			

Claim Line Details

Find | View All First 1 of 1 Last

Claim Line#: 1

Contract Period: 1

Period Date From: 02/20/2023

Period Date To: 02/19/2024

Line Type: Initial

Line Comments

Line Attachments

Initial Request Details

Period Total 10,000.00

Initial Percentage 10.00

Initial Amount Calculated 1,000.00

Initial Amount Requested 0.00

Initial Request Justification

Save

Step	Action
18.	Validate the Claim Line Details information and verify the Line type is Initial .
19.	Click the Line Comments button.

SFS Handbook: Grantee Processing in SFS

Claim Line Comments [X]

Help

Business Unit OMH01 Claim Number 000000458 Line Number 1

Find | View All First 1 of 1 Last

Comment [Text Area]

OK Cancel

Step	Action
20.	Enter the applicable value in the Comment field. Note: Line comments are used to add any additional information pertaining to the line for the agency reviewers to view.
21.	Click the OK button.
22.	Click the Line Attachments button.
23.	Click the Add Attachment button.

Claims Attachments [X]

Help

Business Unit OMH01 Claim Number 000000350 Line Number 1

Description 1 [Text Area]

File Attachment [X]

Choose File Test.pdf

Upload Cancel

OK Cancel

Step	Action
24.	Click the Choose File button, select your pdf file, and click the Open button.
25.	Click the Upload button.

SFS Handbook: Grantee Processing in SFS

X
Help

Claims Attachments

Business Unit OMH01
Claim Number 000000458
Line Number 1

Personalize Find View All		First 1 of 1 Last
Description	Add Attachment	View Attachment
1 Training Document	Add Attachment	View Attachment

Attached File



1 Training Document	Add Attachment	View Attachment	Training_Document.pdf
---------------------	----------------	-----------------	-----------------------

+
-

OK
Cancel

Step	Action
26.	Enter a description of the document into the Description field.
27.	Click the OK button.

[illegible]

Step	Action
28.	Enter the applicable value into the Initial Amount Requested field. In this example, we will enter 100 into the Initial Amount Requested field.
29.	Enter the applicable justification into the Initial Request Justification field.
30.	Click the Save button. 
31.	Click the Next button. 

SFS Handbook: Grantee Processing in SFS

The screenshot displays the 'Claim Line Summary' section with the following data:

Line Number	Contract Period	Period From Date	Period To Date	Line Type	Amount Requested
1	1	02/05/2023	02/04/2024	Initial	10.00

Below this is the 'Claim Line Comments Summary' section, followed by the 'Claim Line Attachment Summary' section. The 'Claim Entry Complete' checkbox is checked and highlighted with a green box. Below it is a certification statement: 'I certify that the above bill is just, true and correct; that no part thereof has been paid except as stated and that the balance is actually due and owing, and that taxes for which the State is exempt are excluded.' The 'Signatory Name' field is empty, and the 'Date' is 09/18/2023. At the bottom, the 'Save' and 'Submit' buttons are highlighted with green boxes.

Step	Action
32.	Click the Claim Entry Complete checkbox.
33.	Click the Certification checkbox
34.	Click the Save button and then click the Submit button.
35.	Click the OK button. The Claim is submitted into agency workflow and the claim Status changes to Agency Review .
36.	You have successfully completed the Enter a New Claim – Advance/Initial Amount topic.

Enter a New Claim - Reimbursement Amount

Topic Description:

This topic provides the knowledge and skills to create and submit a reimbursement payment.

Topic Objective:

In this topic, you will learn:

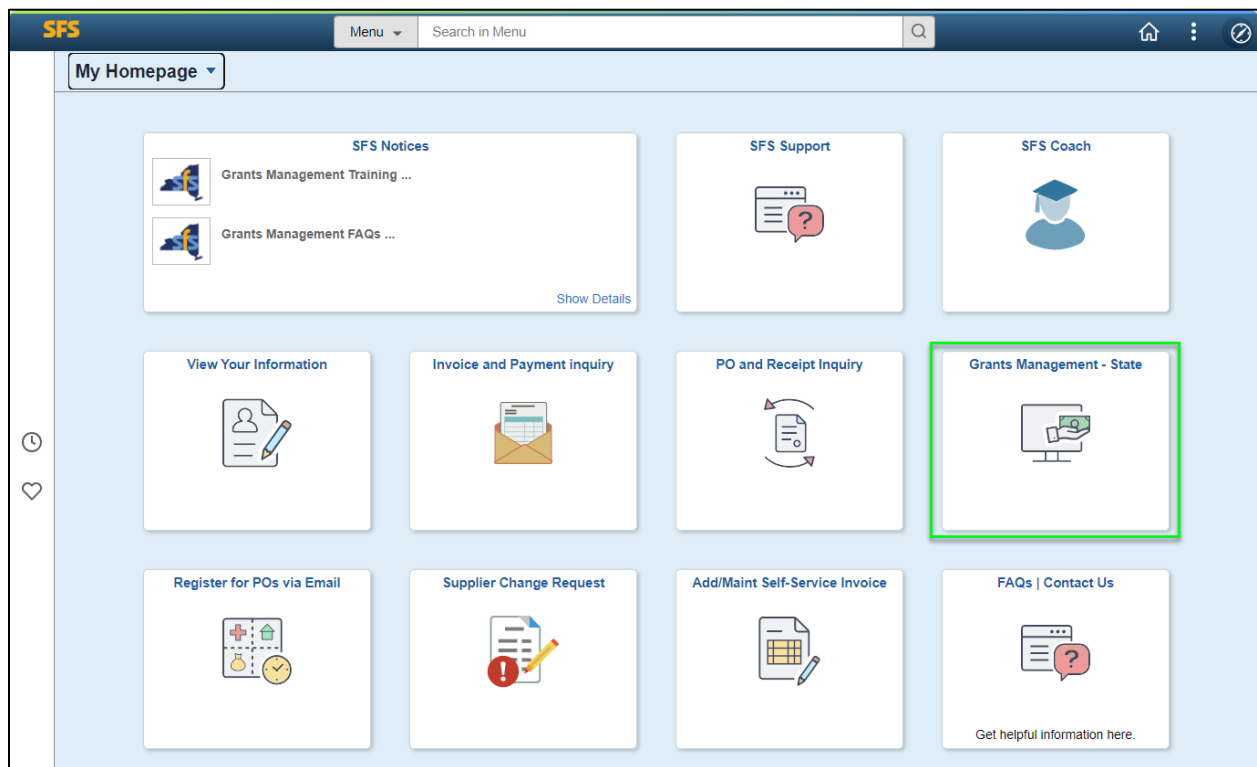
- How to submit a claim for a reimbursement payment

Procedure:

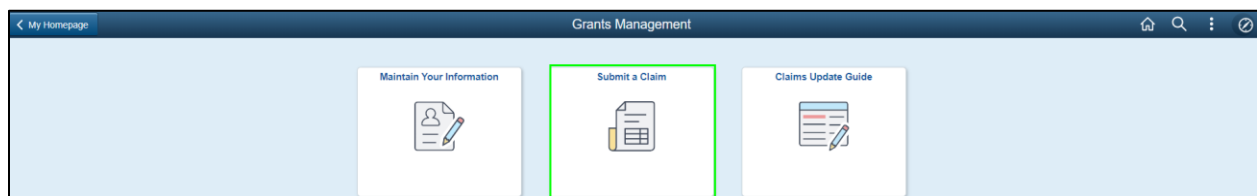
Scenario: You want to submit a reimbursement payment claim on an approved grant contract with remaining funds available.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

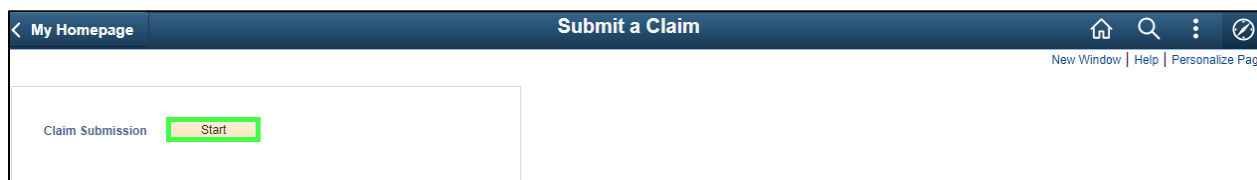
SFS Handbook: Grantee Processing in SFS



Step	Action
1.	<p>Navigation: Click the Grants Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > eSettlements > Submit a Claim.</p> <p>Note: You must log in to the SFS Vendor Portal to enter a claim.</p>



Step	Action
2.	Click the Submit a Claim tile.



SFS Handbook: Grantee Processing in SFS

Step	Action
3.	Click the Start button.

The screenshot shows the 'Claim Entry and Submission' window. On the left, a sidebar lists steps: 'Contract Selection' (Complete), 'Claim Header' (Not Started), 'Claim Lines' (Not Started), 'Claim Line Details' (Not Started), and 'Claim Summary' (Not Started). The main area displays a table of contracts for selection. The 'Next' button in the top right corner is highlighted with a green box.

Select	Contract ID	Description	NYS Contract#	Begin Date	Expire Date	Agency Name	Contract Total
<input type="checkbox"/>	00000000000000000000117523	MULTI- PLATE RETHERM	C00014GM	01/24/2023	01/25/2024	OMH01	10,000.00
<input type="checkbox"/>	00000000000000000000117615	MULTI- PLATE RETHERM	C00014GM	01/24/2023	01/25/2024	OMH01	10,000.00
<input type="checkbox"/>	00000000000000000000117619	MULTI- PLATE RETHERM	C00014GM	02/01/2023	01/25/2024	OMH01	10,000.00
<input type="checkbox"/>	00000000000000000000117706	MULTI- PLATE RETHERM	C00014GM	02/09/2023	02/08/2025	OMH01	10,000.00
<input checked="" type="checkbox"/>	00000000000000000000117744	ENERGY EFFICIENCY REHAB	C00121GM	02/20/2023	02/19/2024	OMH01	10,000.00

Step	Action
4.	A listing of the first five available contracts display. To view more than five contracts, click the View All link.
5.	Click the checkbox to select the appropriate contract.
6.	Click the Next button.

The screenshot shows the 'Claim Header' step in the 'Claim Entry and Submission' window. The sidebar indicates 'Contract Selection' is complete and 'Claim Header' is the current step. The main area displays contract details for the selected contract (ID: 00000000000000000000117744). The 'Save' button at the bottom left is highlighted with a green box.

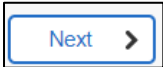
Contract ID: 00000000000000000000117744
 Description: OMH01-C00121GM-1000204
 Project Name: 000000000012111
 Contract Begin Date: 02/20/2023
 Contract Expire Date: 02/19/2024
 Contract Max Amount: 10,000.00
 Invoice ID: A123B456Z
 Claim Initiated Date: 09/08/2023

Supplier ID: 1000016490
 Supplier Name: [REDACTED]
 Supplier Location: MAINEPAY [REDACTED]
 SYRACUSE NY 13202 217 S SALINA ST 21

Claim Status: New
 Claim Date: 09/08/2023
 Claim Type: Regular

Step	Action
7.	Verify contract details on the Claim Header page.

SFS Handbook: Grantee Processing in SFS

Step	Action
8.	<p>Vendor Location values can be selected using the Supplier Location magnifying glass icon, if needed.</p> <p>Note: Vendor Location is a default set of rules, or attributes, that define how an agency conducts business with a particular grantee. A vendor location comprises information such as payment terms, payment options, pay to bank accounts, etc. Although a vendor location is not an address, it does reference addresses.</p>
9.	<p>Note: Change the Claim Date using the calendar icon if needed. Claim date defaults to the current date and should be the date the claim is entered.</p>
10.	Enter a unique Invoice ID up to 30 characters in the Invoice ID field.
11.	Click the Save button.
12.	<p>Click the Next button.</p> 

Contract Selection

Complete

Claim Header

Complete

Claim Lines

Visited

Claim Line Details

Not Started

Claim Summary

Not Started

Select the Contract Period and Claim Line Type

Business Unit: OMH01

Claim Number: 000000350

Contract ID: 00000000000000000000117744

Description: OMH01-C00121GM-1000204

Project Name: 000000000012111

Contract Begin Date: 02/20/2023

Contract Expire Date: 02/19/2024

Contract Max Amount: 10,000.00

Invoice ID: A123B456Z

Claim Initiated Date: 09/08/2023

Supplier ID: 1000016490

Supplier Name:

Supplier Location: MAINEPAY

Syracuse NY 13202

Claim Status: In Process

Claim Date: 09/08/2023

Claim Type: Regular

Line Number

*Contract Period

Period From Date

Period To Date

Period Amount

*Line Type

1

1

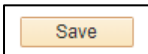
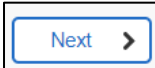
02/20/2023

02/19/2024

10,000.00

Initial Reimbursement

Save

Step	Action
13.	Select a Contract Period by clicking on the magnifying glass next to the field. Note: You would select the available contract period based on the payment schedule and due date listed on the contract.
14.	Click the Line Type dropdown menu and select the Reimbursement line type.
15.	Click the Save button. 
16.	Click the Next button. 

SFS Handbook: Grantee Processing in SFS

Claim Line Details Find | View All First 1 of 1 Last

Claim Line#: 1 Contract Period: 1 Period Date From: 02/20/2023 Period Date To: 02/19/2024

Line Type: Reimbursement Vendor: 1000016490 - OMH01-C00121GM-1000204

NYS Contract ID: C00121GM - Hdr Bid 2-20

Line Comments
Line Attachments

Reimbursement Claim Details

Budget Type: CAPITAL

Cost Incurred Date From: Cost Incurred Date To:

Reimbursement Funds Personalize | Find | View All | First 1-4 of 4 Last

Budget Category	Approved Grant Budget	Previous Cumulative Expenditure	In Process Expenditures	Expenditure for this Report	Reviewed Amount	Current Cumulative Expenditure
1 SCOPING & PRE-DEVELOPMENT	100.00	25.00	17.22	0.00	0.00	25.00
2 DESIGN	350.00	21.00	13.23	0.00	0.00	21.00
3 ACQUISITION	300.00	3.00	12.24	0.00	0.00	3.00
4 CONSTRUCTION	250.00	24.50	11.50	0.00	0.00	24.50
Grant Fund Totals	1,000.00	73.50	54.19	0.00	0.00	73.50
Match Fund Totals	0.00	0.00	0.00	0.00	0.00	0.00

Save

Step	Action
17.	Validate Claim Line Details information. Line type is Reimbursement . Note: Budget categories and Approved Grant Budget amounts will transfer from the approved grant contract.
18.	Click the Line Comments button.

SFS Handbook: Grantee Processing in SFS

Claim Line Details

Claim Line#: 1 Contract Period: 1 Period Date From: 02/20/2023 Period Date To: 02/19/2024

Business Unit OMH01 Claim Number 000000350 Line Number 1

Comment add comments

OK Cancel

Line Comments

Step	Action
19.	Enter the applicable value into the Comments field. Note: Line comments are used to add any additional information pertaining to the line for the agency reviewers to view.
20.	Click the OK button.
21.	Click the Line Attachments button.
22.	Click the Add Attachment button.

Claims Attachments

Business Unit OMH01 Claim Number 000000350 Line Number 1

Description 1

File Attachment

Choose File Test.pdf

Upload Cancel

OK Cancel

Step	Action
23.	Click the Choose File button, select your pdf file, and click the Open button. Note: Only .pdf files can be uploaded.
24.	Click the Upload button.

SFS Handbook: Grantee Processing in SFS

Claims Attachments Help

Business Unit OMH01 Claim Number 00000350 Line Number 1

Personalize | Find | View All | First 1 of 1 Last

Description	Add Attachment	View Attachment	Attached File
1	Add Attachment	View Attachment	Test.pdf

OK Cancel

Step	Action
25.	Enter a description of the document into the Description field.
26.	Click the OK button.

Previous Next

Contract Max Amount: 10,000.00 Claim Date: 09/08/2023
 Invoice ID: A123B456Z Claim Type: Regular
 Claim Initiated Date: 09/08/2023

Contract Selection Complete
Claim Header Complete
Claim Lines Complete
Claim Line Details Visited
Claim Summary Not Started

Claim Line Details Find | View All | First 1 of 1 Last

Claim Line#: 1 Contract Period: 1 Period Date From: 02/20/2023 Period Date To: 02/19/2024
 Line Type: Reimbursement Vendor: 1000016490 - OMH01-C00121GM-1000204 Line Comments
 NYS Contract ID: C00121GM - Hdr Bid 2-20 Line Attachments

Reimbursement Claim Details

Budget Type: CAPITAL
 Cost Incurred Date From: 08/01/2023 Cost Incurred Date To: 08/31/2023

Budget Category	Approved Grant Budget	Previous Cumulative Expenditure	In Process Expenditures	Expenditure for this Report	Reviewed Amount	Current Cumulative Expenditure
1 SCOPING & PRE-DEVELOPMENT	100.00	25.00	17.22	1.00	0.00	26.00
2 DESIGN	350.00	21.00	13.23	0.50	0.00	21.50
3 ACQUISITION	300.00	3.00	12.24	1.00	0.00	4.00
4 CONSTRUCTION	250.00	24.50	11.50	.75	0.00	24.50
Grant Fund Totals	1,000.00	73.50	54.19	2.50	0.00	76.00
Match Fund Totals	0.00	0.00	0.00	0.00	0.00	0.00

Save

Step	Action
27.	Enter the applicable dates into the Cost Incurred Date From field and the Cost Incurred Date To field. You can also use the calendar icons to select the dates. Note: Cost Incurred Date From and Cost Incurred Date To must be within the period date range.

SFS Handbook: Grantee Processing in SFS

Step	Action
28.	Enter the expenditure amounts for each budget category into the Expenditures for this Report field. Note: This is the amount you are requesting reimbursement for, for each budget category.
29.	Click the Save button
30.	Click the Next button.

The screenshot shows the 'Claim Summary' section of the SFS Claim Entry form. On the left sidebar, 'Claim Summary' is marked as 'Visited'. The main content area includes sections for 'Claim Header Comments History', 'Workflow Comment History', 'Add Claim Header Comment' (with an 'Add Comments' button), 'Claim Line Summary' (a table with 1 line item), 'Claim Line Comments Summary', and 'Claim Line Attachment Summary'. Below these, the 'Claim Entry Complete' checkbox is checked. A certification statement is also checked, stating: 'I certify that the above bill is just, true and correct, that no part thereof has been paid except as stated and that the balance is actually due and owing, and that taxes for which the State is exempt are excluded.' At the bottom, there are fields for 'Signatory Name' and 'Date' (09/06/2023), and 'Save' and 'Submit' buttons are highlighted with green boxes.

Step	Action
31.	Enter the applicable text into the Add Claim Header Comment field. Note: Header comments are optional and used to enter additional information about the entire claim.
32.	Click the Add Comments button to add a claim header comment.
33.	Click the Claim Entry Complete checkbox.
34.	Click the Certification checkbox.
35.	Click the Save button
36.	Click the Submit button.
37.	Click the OK button. The claim is submitted into agency workflow and the claim Status changes to Agency Review .

SFS Handbook: Grantee Processing in SFS

Step	Action
38.	You have successfully completed the Enter a New Claim – Reimbursement Amount topic.

Update an Existing Claim

Topic Description:

This topic provides the knowledge and skills to update an in process claim.

Topic Objective:

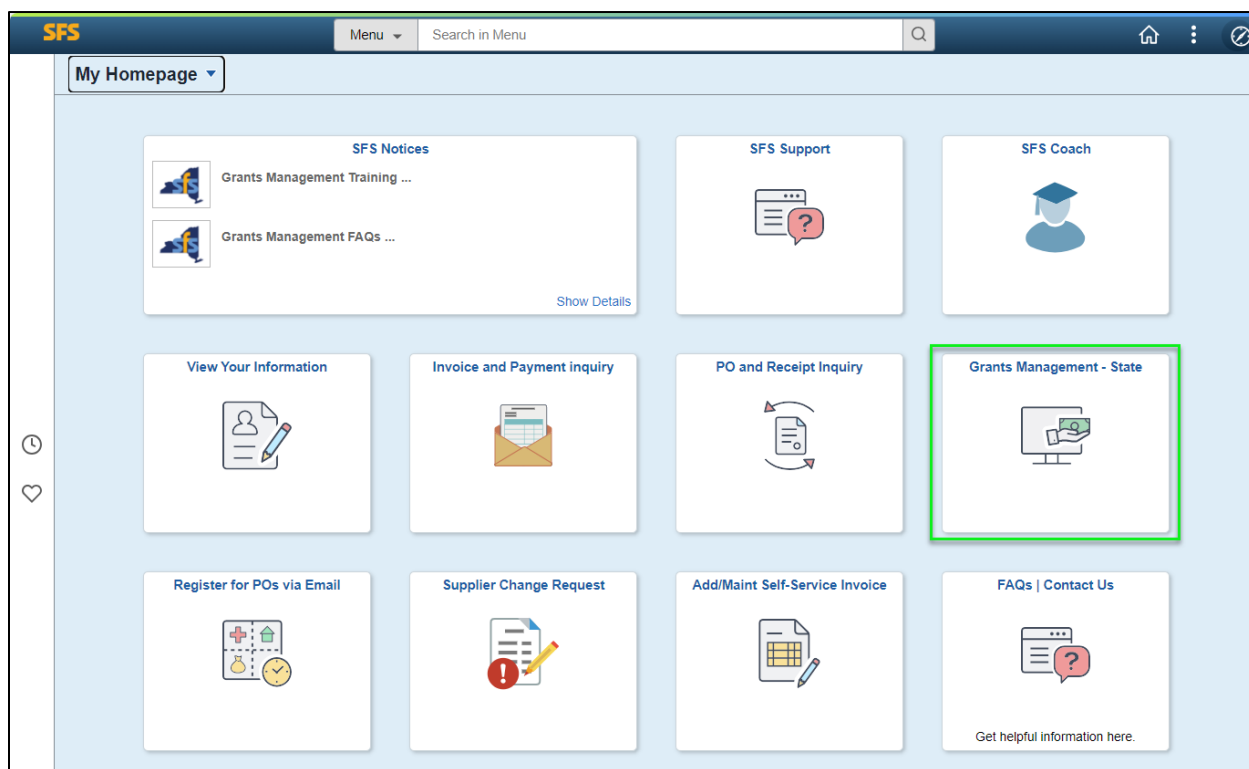
In this topic, you will learn:

- How to update and submit a saved claim

Procedure:

Scenario: You started entering a claim, but did not finish entering it, and saved the claim to work on later. You now need to complete the remaining claim information and submit the claim for agency approval.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.



SFS Handbook: Grantee Processing in SFS

Step	Action
1.	<p>Navigation: Click the Grants Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > eSettlements > Claims Update Guide.</p> <p>Note: You must log in to the SFS Vendor Portal to update an existing claim.</p>

[My Homepage](#)
Grants Management

[Bid Event Search](#)


[Maintain Your Information](#)


[Prequalification Application](#)


[Bid Response Search](#)


[Grant Contracts Search](#)


[Progress Report Search](#)

1
Active Progress Reports

26
Past Due Progress Reports

[Submit a Claim](#)


[Claims Update Guide](#)


Step	Action
2.	Click the Claims Update Guide tile.

Grants Management

Claims Update Guide

Home

Search

Help

Personalize Page

Manage Claims

Search Criteria

SetID

Business Unit

Supplier ID

Supplier Name

Claim Number

Claim Date

Claim Status

Contract ID

NYS Contract #

Invoice ID

Invoice Date

Search

Clear

Step	Action
3.	Enter the applicable search criteria in the Search Criteria fields or click the magnifying glass icon to look up the information.
4.	Click the Search button to display the search results.

[illegible]

SFS Handbook: Grantee Processing in SFS

Step	Action
5.	Select the In Process menu on the left side of the page to view all in process claims.
6.	Click the Claim Number link associated to the claim you want to update.

Contract Selection
Complete

Claim Header
Complete

Claim Lines
Complete

Claim Line Details
Visited

Claim Summary
Not Started

Business Unit: OMH01 Claim Number: 000000460

Contract ID: 00000000000000000000117744

Supplier ID: 1000016490

Description: OMH01-C00121GM-1000204

Supplier Name:

Project Name: 000000000012111

Supplier Location: MAINEPAY

217 S SALINA ST
2ND FL

Contract Begin Date: 02/20/2023

SYRACUSE NY 13202

Contract Expire Date: 02/19/2024

Claim Status: In Process

Contract Max Amount: 10,000.00

Claim Date: 10/23/2023

Invoice ID: test02876

Claim Type: Regular

Claim Initiated Date: 10/23/2023

Claim Line Details

Find | View All First 1 of 1 Last

Claim Line#: 1 Contract Period: 1 Period Date From: 02/20/2023 Period Date To: 02/19/2024

Line Type: Reimbursement

Line Comments

Line Attachments

Reimbursement Claim Details

Budget Type CAPITAL

Cost Incurred Date From Cost Incurred Date To

Reimbursement Funds

Personalize | Find | View All | First 1-4 of 4 Last

	Budget Category	Approved Grant Budget	Previous Cumulative Expenditure	In Process Expenditures	Expenditure for this Report	Reviewed Amount	Current Cumulative Expenditure
1	SCOPING & PRE-DEVELOPMENT	100.00	47.50	25.22	0.00	0.00	47.50
2	DESIGN	350.00	33.00	20.73	0.00	0.00	33.00
3	ACQUISITION	300.00	12.50	17.74	0.00	0.00	12.50
4	CONSTRUCTION	250.00	30.25	18.25	0.00	0.00	30.25
Grant Fund Totals		1,000.00	123.25	81.94	0.00	0.00	123.25
Match Fund Totals		0.00	0.00	0.00	0.00	0.00	0.00

Save

Step	Action
7.	<p>Select the applicable section(s) on the left of the page that you need to complete.</p> <p>In this example, we need to enter the cost incurred dates and the expenditure amounts for the Claim Line Details section.</p>
8.	After completing the remaining claims information, click the Claim Summary section to submit the claim for approval.

SFS Handbook: Grantee Processing in SFS

Step	Action
9.	Click the Claim Entry Complete checkbox.
10.	Click the Certification checkbox.
11.	Click the Save button
12.	Click the Submit button.
13.	Click the OK button. Claim is submitted into agency workflow and the claim Status changes to Agency Review .
14.	You have successfully completed the Update an Existing Claim topic.

Update a Returned Claim

Topic Description:

This topic provides the knowledge and skills to update a claim returned by the agency.

Topic Objective:

In this topic, you will learn:

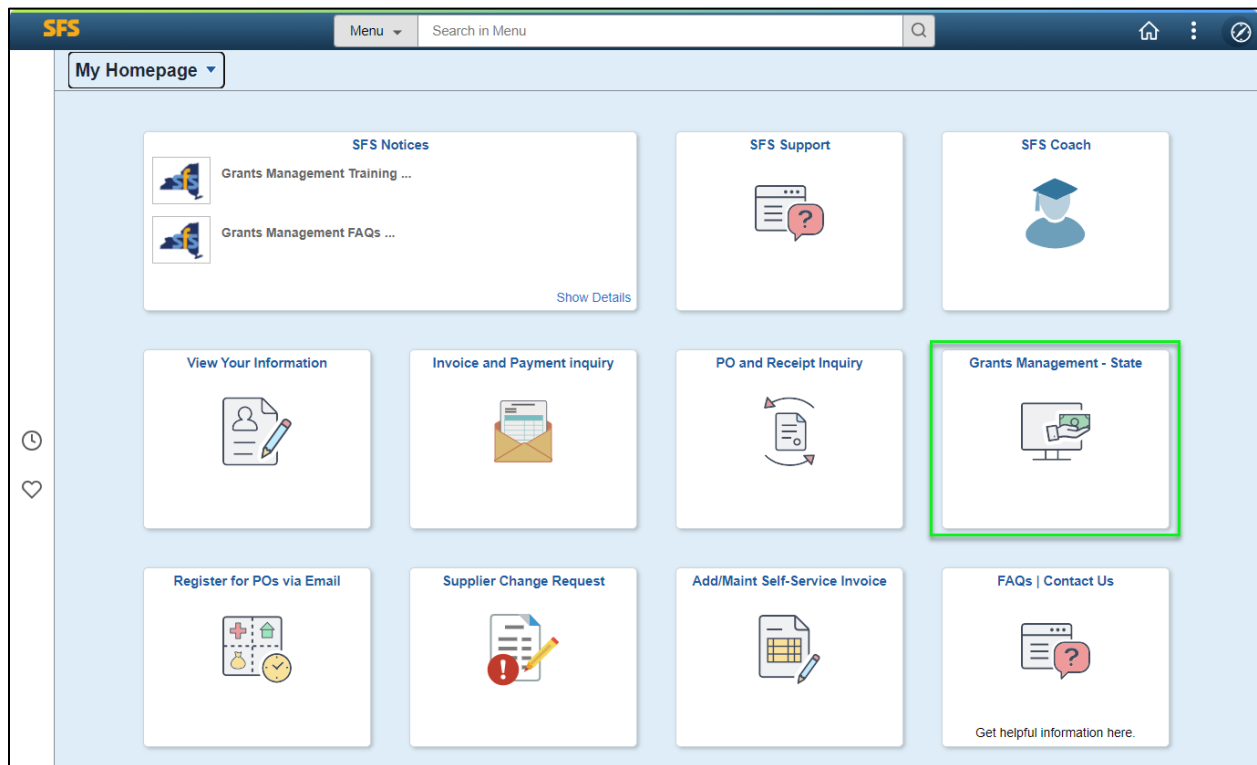
SFS Handbook: Grantee Processing in SFS

- How to update and resubmit a returned claim

Procedure:

Scenario: You previously submitted a claim for agency review. The agency has returned your claim and requests that you attach additional supporting documentation. You need to update your claim with additional supporting documents and resubmit your claim to the agency for approval.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.



Step	Action
1.	Navigation: Click the Grants Management - State tile. Alternative Navigation: From the NavBar navigate to: Menu > eSettlements > Claims Update Guide.

SFS Handbook: Grantee Processing in SFS

[My Homepage](#)

Grants Management

Bid Event Search

Maintain Your Information

Prequalification Application

Bid Response Search

Grant Contracts Search

Progress Report Search

1
Active Progress Reports
26
Past Due Progress Reports

Submit a Claim

Claims Update Guide

Step	Action
2.	Click the Claims Update Guide tile.

Claims Management

Claims Update Guide

Manage Claims

▼ Search Criteria

SetID

SHARE

Business Unit

OMH01

Supplier ID

Supplier Name

Claim Number

Claim Date

Claim Status

Returned

Contract ID

NYS Contract #

Invoice ID

Invoice Date

Search

Clear

Step	Action
3.	Enter the applicable search criteria in the Search Criteria fields or click the magnifying glass icon to look up the information.
4.	Click the Claim Status drop-down field and select the Returned list item.
5.	Click the Search button to display the search results.

[illegible]

SFS Handbook: Grantee Processing in SFS

Step	Action
6.	Select the Returned menu on the left side of the page to view all returned claims.
7.	Click the Claim Number link associated to the claim you want to update.

X Exit
Update Claim
< Previous

Contract Selection

Complete

Claim Header

Complete

Claim Lines

Complete

Claim Line Details

Complete

Claim Summary

Visited

Certify and Submit Claim after reviewing for completeness and accuracy.

Business Unit: CMH01 Claim Number: 00000399

Contract ID: 0000000000000000000017744

Description: OAH01-C001210M-1000204

Project Name: 0000000000012111

Contract Begin Date: 02/20/2023

Contract Expire Date: 02/19/2024

Contract Max Amount: 10,000.00

Invoice ID: 100423_TB_NV2

Claim Initiated Date: 10/04/2023

Supplier ID: 100015490

Supplier Name:

Supplier Location: MAINFRAY

SYRACUSE NY 13202

217 S SALINA ST
2ND FL

Claim Status: Returned

Claim Date: 10/04/2023

Claim Type: Regular

Header Attachment Summary

File Name	Description	Uploaded by User	
1			View Attachment

Claim Header Comments History

Please add documentation

Testing email notification of claim denial

Last Comment Added By: Agency_River_App_1C

(on 2023-10-04-11:22:44.000000)

[View History](#)

Workflow Comment History

Please add documentation

Comment Added By: Agency_River_App_1C

(on 2023-10-04-11:23:15.000000)

[View History](#)

Add Claim Header Comment

[Add Comments](#)

Claim Line Summary

Line Number	Contract Period	Period From Date	Period To Date	Line Type	Amount Requested
1	1	02/20/2023	02/19/2024	Reimburse	5.50

Claim Line Comments Summary

Line Number	Comment	Comment Entered By	Comment Entered On
-------------	---------	--------------------	--------------------

Claim Line Attachment Summary

Line Number	File Name	Description	Uploaded by User	
				View Attachment


Step	Action
8.	Click the Claim Summary menu on the left side of the page.
9.	Click the View History link to view the workflow comments associated with the returned claim.

Claims Comments

×

Help

Business Unit OMH01 Claim ID 000000399

Personalize Find View All  						
Comments		Comment Entered By	Comment Entered On	First	1 of 1	Last
1	Please add documentation	Agency_Rvwr_Appr_1C	10/04/2023 11:23AM			

OK

Cancel

SFS Handbook: Grantee Processing in SFS

Step	Action
10.	After reviewing the workflow comment(s) information, click the OK button to return to the Claim Summary page.

X Exit

Update Claim

Contract Selection
Complete

Claim Header
Complete

Claim Lines
Complete

Claim Line Details
Complete

Claim Summary
Visited

Business Unit: OMH01 Claim Number: 000000399

Contract ID: 0000000000000000000117744
Description: OMH01-C00121GM-1000204
Project Name: 000000000012111

Supplier ID: 1000016490
Supplier Name:
Supplier Location: MAINEPAY SYRACUSE

Contract Begin Date: 02/20/2023
Contract Expire Date: 02/19/2024
Contract Max Amount: 10,000.00
Invoice ID: 100423_TB_INV2
Claim Initiated Date: 10/04/2023

Claim Status: Returned
Claim Date: 10/04/2023
Claim Type: Regular

Claim Line DetailsFind | View

Claim Line#: 1Contract Period: 1Period Date From: 02/20/2023Period Date To: 02/19/2024

Line Type: Reimbursement

Line Comments

Line Attachments

Reimbursement Claim Details

Step	Action
11.	Make the update(s) requested by the agency. In this example, we will attach additional documentation, so we will click the Claim Line Details tab.
12.	Click the Line Attachments button to upload additional documentation.

Claims Attachments

Help

Business Unit OMH01

Claim Number 000000399

Line Number 1

Personalize Find View All				First	1 of 1	Last
	Description	Add Attachment	View Attachment	Attached File		
1	<input type="text" value="Training Document"/>	<input type="button" value="Add Attachment"/>	<input type="button" value="View Attachment"/>	Training_Document.pdf	<input type="button" value="+"/>	

SFS Handbook: Grantee Processing in SFS

Step	Action
13.	Click the Add a New Row (+) icon to add a new row.

The screenshot shows the 'Claims Attachments' window. At the top, it displays 'Business Unit OMH01', 'Claim Number 000000399', and 'Line Number 1'. Below this is a table with columns: 'Description', 'Add Attachment', 'View Attachment', and 'Attached File'. The first row contains 'Training Document', 'Add Attachment', 'View Attachment', and 'Training_Document.pdf'. The second row is empty, and the 'Add Attachment' button is highlighted with a green box. At the bottom, there are 'OK' and 'Cancel' buttons.

Step	Action
14.	Click the Add Attachment button to upload additional documentation.

The screenshot shows the 'Claims Attachments' window with a 'File Attachment' dialog box open. The dialog box has a title bar 'File Attachment' and a close button. It contains a text input field with 'Payroll Support.pdf' and two buttons: 'Choose File' and 'Upload'. The 'Choose File' button is highlighted with a green box. The 'Upload' button is also highlighted with a green box. The background window shows the same table as the previous screenshot, but the 'Add Attachment' button is now disabled.

Step	Action
15.	Click the Choose File button, select your pdf file, and click the Open button. Note: Only .pdf files can be uploaded.
16.	Click the Upload button.

SFS Handbook: Grantee Processing in SFS

Claims Attachments

Help

Business Unit







OMH01

Claim Number

000000399

Line Number

1

<div>Personalize Find View All  </div>				First		1-2 of 2		Last
Description	Add Attachment	View Attachment	Attached File					
1 Training Document	Add Attachment	View Attachment	Training_Document.pdf					
2 Additional Support	Add Attachment	View Attachment	Payroll_Support.pdf					

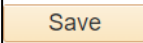
OK

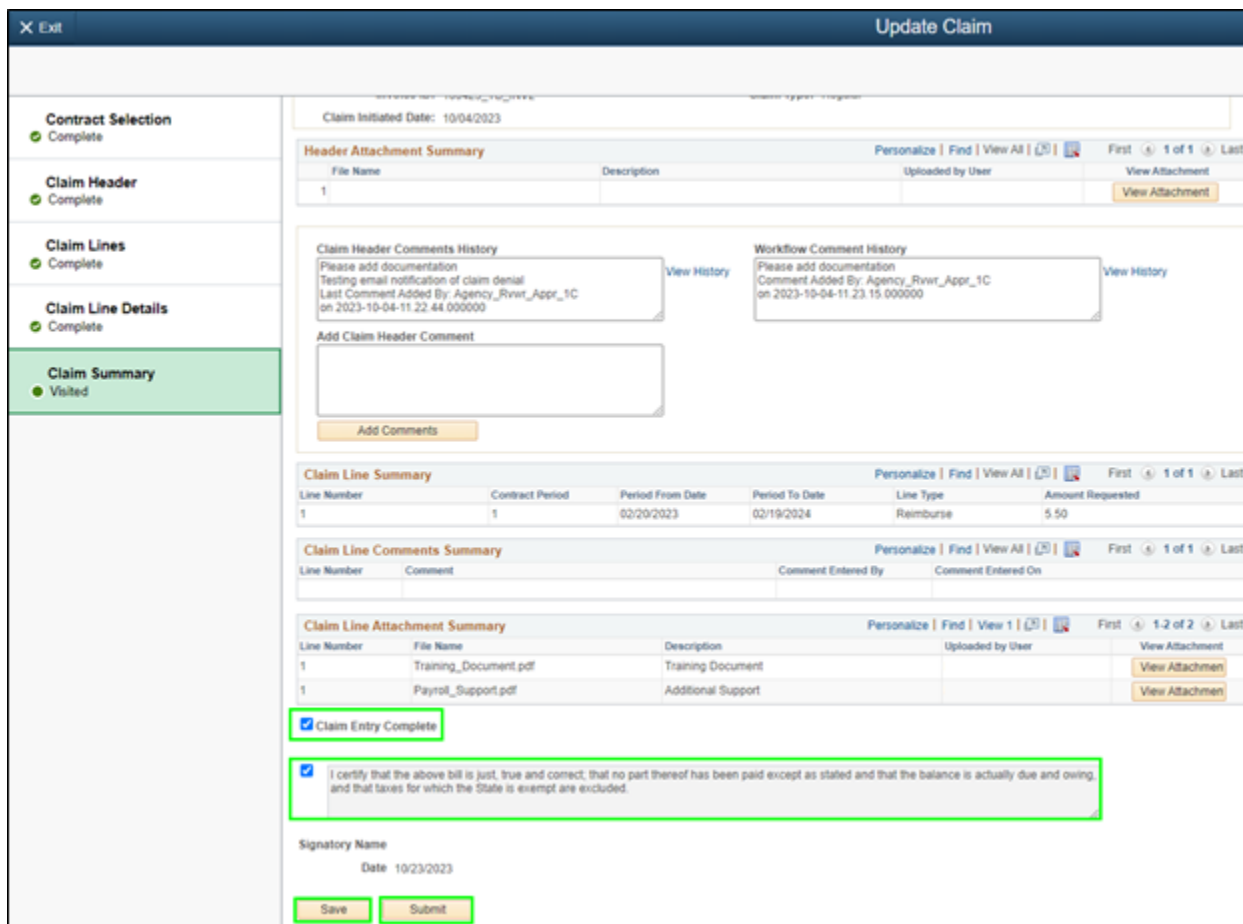
Cancel

Step	Action
17.	Enter the document description in the Description field.
18.	Click the OK button.

[illegible]

SFS Handbook: Grantee Processing in SFS

Step	Action
19.	Click the Save button. 
20.	Click the Claim Summary menu on the left side of the page.



Update Claim

Claim Initiated Date: 10/04/2023

Header Attachment Summary

File Name	Description	Uploaded by User	View Attachment
1			View Attachment

Claim Header Comments History

Please add documentation
Testing email notification of claim denial
Last Comment Added By: Agency_Rvwr_Appl_1C
on 2023-10-04-11:22:44.000000 [View History](#)

Workflow Comment History

Please add documentation
Comment Added By: Agency_Rvwr_Appl_1C
on 2023-10-04-11:23:15.000000 [View History](#)

Add Claim Header Comment

[Add Comments](#)

Claim Line Summary

Line Number	Contract Period	Period From Date	Period To Date	Line Type	Amount Requested
1	1	02/20/2023	02/19/2024	Reimburse	5.50

Claim Line Comments Summary

Line Number	Comment	Comment Entered By	Comment Entered On

Claim Line Attachment Summary

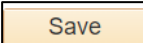
Line Number	File Name	Description	Uploaded by User	View Attachment
1	Training_Document.pdf	Training Document		View Attachment
1	Payroll_Support.pdf	Additional Support		View Attachment

☒ **Claim Entry Complete**

☒ I certify that the above bill is just, true and correct; that no part thereof has been paid except as stated and that the balance is actually due and owing, and that taxes for which the State is exempt are excluded.

Signatory Name
Date: 10/23/2023

[Save](#) [Submit](#)

Step	Action
21.	Click the Claim Entry Complete check box.
22.	Click the Certification checkbox.
23.	Click the Save button. 
24.	Click the Submit button.
25.	Click the OK button. The claim is submitted into agency workflow and the claim Status changes to Agency Review .
26.	You have successfully completed the Update a Returned Claim topic.

SFS Handbook: Grantee Processing in SFS

Claim Inquiry

Topic Description:

This topic provides the knowledge and skills for the user to inquire on grants claims in various statuses. **Note:** Data is view only on the claim inquiry pages.

Topic Objective:

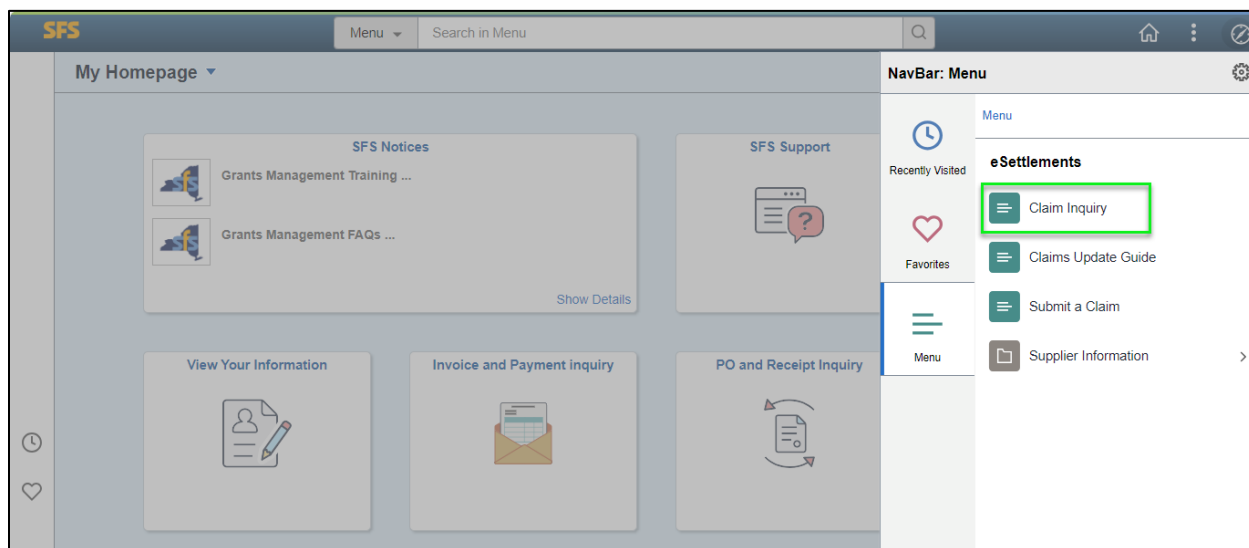
In this topic, you will learn:

- How to inquire on a claim

Procedure:

Scenario: You want to look up a claim and see where it is in the approval process.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.



Step	Action
1.	From the NavBar navigate to: Menu > eSettlements > Claim Inquiry. Note: You must log in to the SFS Vendor Portal to view a claim.

SFS Handbook: Grantee Processing in SFS

Claim Inquiry

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ Search Criteria


Inquiry Name

begins with ▼

Description

begins with ▼

☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Step	Action
2.	Note: The Claim Inquiry feature allows you to search for and view existing claims. The search criteria you use to search for existing claims can be saved under an Inquiry Name so you can access and reuse it each time you search for claim(s).
3.	<p>If you already created and saved Claim Inquiry Name(s), you can use the Find an Existing Value tab. You would enter the applicable search criteria and click the Search button to display the existing Inquiry Names that can be selected.</p> <p><u>or</u></p> <p>If the Claim Inquiry Name is not already established and you want to create a new Inquiry Name, click the Add a New Value tab, enter the desired Claim Inquiry Name, and click the Add button.</p>

SFS Handbook: Grantee Processing in SFS

Step	Action
4.	Enter the desired Business Unit , Vendor ID , and any other available search criteria if known. Note: Vendor ID is a required search field.
5.	Note: The Claim Status options are: <ul style="list-style-type: none"> • New • In Process • Returned • Complete • Under Agency Review • Approved • Cancelled <p>In this example, we will not search by claim status.</p>
6.	Click the Search button.

Claim Details							
Business Unit	Vendor ID	Supplier Name	Claim ID	Invoice Number	Claim Date	Claim Status	Final Appro
1 OMH01	1000016490		000000025	Test1	02/16/2023	In Process	
2 OMH01	1000016490		000000028	Test_reg1	02/20/2023	Agency Rev	
3 OMH01	1000016490		000000079	022423_TB_REIMB2	02/24/2023	In Process	
4 OMH01	1000016490		000000083	NewInv	02/28/2023	Complete	

Step	Action
7.	Verify Claim Details and Voucher and Payment results for the desired claim.
8.	On the Claim Details tab, click on the Claim ID link for the desired claim.

SFS Handbook: Grantee Processing in SFS

Claim Review via Inquiry

Claim Review Summary

▼ Header Details

Business Unit: OMH01

Supplier Name: [REDACTED]

Supplier ID: 1000016490

Supplier Location: MAINEPAY

Description: OMH01-C00014GM-1090004

Project Name: MULTI- PLATE RETHERM

Contract Begin Dt: 01/24/2023

Contract Expire Dt: 01/25/2024

Claim Number: 000000167

Contract ID: 000000000000000000000000117523

Contract Max Amount: \$10,000.00

Grantee Claim Reference: 051823_TB_lm2

Claim Date: 05/18/2023

Net Days in Review: 121

MIR Adjustment Date:

Claim Type: Regular

Claim Initiated Dt:

Claim Received Dt:

Final Approval Dt:

Bypass eSettlement Review ☒

Bypass Agency Voucher Approval ☐

Claim Status: Agency Rev

Voucher ID:

Approval Step: 2

▼ Line Details

1 of 1

Last

Line #	Line Type	Contract Period	Contract Period Amount	Requested Amount	Reviewed Amount	Net Payment Amount	Reviewed	Modified By	Modified On
1	Reimbursement	1	\$10,000.00	\$5.85	\$5.85	\$0.00	Yes	Agency_Rwr_Appr_2C	06/13/2023 8:02:08AM

Claim Comments

Comment entered by proxy

Last Comment Added By : Agency_Proxy_D On : 05/18/2023 - 11:40 AM

Header Comments (1)

Workflow Comments (2)

Add Comment

☒ Show to Supplier

☐ Show in Invoice

Save

Attachments (0)

Preview Claim

View Approvals

Cancel

Step	Action
9.	Click the View Approvals link.

[illegible]

SFS Handbook: Grantee Processing in SFS

Step	Action
10.	After reviewing the approval workflow, click the Close (X) icon.

Claim Review Summary

Header Details

Business Unit: OMH01	Claim Number: 000000167	Claim Type: Regular
Supplier Name: [REDACTED]	Contract ID: 000000000000000000117523	Claim Initiated Dt:
Supplier ID: 1000016490	Contract Max Amount: \$10,000.00	Claim Received Dt:
Supplier Location: MAINEPAY	Grantee Claim Reference: 051823_TB_inv2	Final Approval Dt:
Description: OMH01-C00014GM-1090004	Claim Date: 05/18/2023	
Project Name: MULTI- PLATE RETHERM	Net Days in Review: 121	
Contract Begin Dt: 01/24/2023	MIR Adjustment Date:	
Contract Expire Dt: 01/25/2024		

Bypass eSettlement Review ☒ **Bypass Agency Voucher Approval** ☐

Claim Status: Agency Rev **Voucher ID:** **Approval Step:** 2

Line Details | 1 of 1 | Last

Line #	Line Type	Contract Period	Contract Period Amount	Requested Amount	Reviewed Amount	Net Payment Amount	Reviewed	Modified By	Modified On
1	Reimbursement	1	\$10,000.00	\$5.85	\$5.85	\$0.00	Yes	Agency_Rvwr_Aprr_2C	06/13/2023 8:02:06AM

Claim Comments

Comment entered by proxy
 Last Comment Added By > On : 05/18/2023 - 11:40 AM

Header Comments (1)

Workflow Comments (2)

Add Comment

☒ Show to Supplier ☐ Show in Invoice

Attachments (0)

Preview Claim
[View Approvals](#)

Save Cancel

Step	Action
11.	Click the Reviewed Amount button.

SFS Handbook: Grantee Processing in SFS

Review Claims Component

Project Name: MULTI- PLATE RETHERM Net Days in Review: 159
 Contract Begin Dt: 01/24/2023
 Contract Expire Dt: 01/25/2024

Bypass eSettlement Review: ☒ Claim Line No: 1 Line Type: Reimbursement Reviewed: Yes Contract Period: 1
 Bypass Agency Voucher Approval: ☐ Claim Status: Under Agency Review Voucher ID: Period Amount: \$10,000.00

Budget Type: EXPENDITURE Cost Incurred Date From: 05/08/2023 Cost Incurred Date To: 05/09/2023

Reimbursement Funds | 1-10 of 10

Budget Category	Approved Budget	Previous Cumulative Expenditures	In-Process	Expenditures for this Report	Reviewed Amount	Current Cumulative Expenditures	Detail
1 SALARY	\$30,500.00	\$0.00	\$4.00	\$2.00	\$2.00	\$2.00	1
2 FRINGE	\$2,000.00	\$0.00	\$1.00	\$1.00	\$1.00	\$1.00	1
3 CONTRACTUAL	\$1,200.00	\$0.00	\$0.16	\$1.50	\$1.50	\$1.50	1
4 TRAVEL	\$13,000.00	\$0.00	\$0.14	\$1.35	\$1.35	\$1.35	1
5 EQUIPMENT	\$2,500.00	\$0.00	\$2.60	\$0.00	\$0.00	\$0.00	1
6 SPACE/PROPERTY RENT	\$2,300.00	\$0.00	\$0.15	\$0.00	\$0.00	\$0.00	1
7 SPACE/PROPERTY OWN	\$800.00	\$0.00	\$10.00	\$0.00	\$0.00	\$0.00	1
8 UTILITIES	\$275.00	\$0.00	\$2.85	\$0.00	\$0.00	\$0.00	1
9 OPERATING EXPENSES	\$100.00	\$0.00	\$1.10	\$0.00	\$0.00	\$0.00	1
10 OTHER	\$70.00	\$0.00	\$0.10	\$0.00	\$0.00	\$0.00	1
Total	\$52,745.00	\$0.00	\$22.10	\$5.85	\$5.85	\$5.85	

Match Funds | 1-5 of 5

Budget Category	Approved Budget	Previous Cumulative Expenditure	In-Process	Expenditures for this Report	Reviewed Amount	Current Cumulative Expenditures
1 SALARY	\$3,607.50	\$0.00	\$0.20	\$0.00	\$0.00	\$0.00
2 FRINGE	\$0.00	\$0.00	\$0.30	\$0.00	\$0.00	\$0.00
3 TRAVEL	\$1,500.00	\$0.00	\$0.30	\$0.00	\$0.00	\$0.00
4 EQUIPMENT	\$320.00	\$0.00	\$0.20	\$0.00	\$0.00	\$0.00
5 OPERATING EXPENSES	\$12.50	\$0.00	\$0.75	\$0.00	\$0.00	\$0.00
Total	\$5,440.00	\$0.00	\$1.75	\$0.00	\$0.00	\$0.00

OK Cancel **Line Comments (2)** Attachments (1)

Step	Action
12.	Click the Line Comments button (the number in parenthesis indicates the number of comments).

SFS Handbook: Grantee Processing in SFS

Reimbursement Line Comments Help

Line Comments

Business Unit: OMH01 Claim Number: 000000167 Line Nbr: 1 Claim Type: Reimbursement

Add Line And Return

☒ Show to Supplier
☒ Show In Invoice

Line Comment History Find First 1-2 of 2 Last

Seq	2	line comment by reviewer	<input checked="" type="checkbox"/> Show to Supplier <input type="checkbox"/> Show In Invoice	Created By: D Created On: 05/18/23 11:58AM Role: A
Seq	1	line comment	<input checked="" type="checkbox"/> Show to Supplier <input type="checkbox"/> Show In Invoice	Created By: Created On: 05/18/23 11:43AM Role: P

OK

Cancel

Step	Action
13.	Click the OK button when your review of the line comments is complete.

Review Claims Component

Project Name: MULTI- PLATE RETHERM Net Days in Review: 159

Contract Begin Dt: 01/24/2023
Contract Expire Dt: 01/25/2024

Bypass eSettlement Review: ☒ Claim Line No: 1 Line Type: Reimbursement
 Bypass Agency Voucher Approval: ☐ Claim Status: Under Agency Review

Reviewed: Yes Contract Period: 1
 Voucher ID: Period Amount: \$10,000.00

Budget Type: EXPENDITURE Cost Incurred Date From: 05/08/2023 Cost Incurred Date To: 05/09/2023

Reimbursement Funds 1-10 of 10

Grant	Budget Category	Approved Budget	Previous Cumulative Expenditures	In-Process	Expenditures for this Report	Reviewed Amount	Current Cumulative Expenditures	Detail
	1 SALARY	\$30,500.00	\$0.00	\$4.00	\$2.00	\$2.00	\$2.00	
	2 FRINGE	\$2,000.00	\$0.00	\$1.00	\$1.00	\$1.00	\$1.00	
	3 CONTRACTUAL	\$1,200.00	\$0.00	\$0.16	\$1.50	\$1.50	\$1.50	
	4 TRAVEL	\$13,000.00	\$0.00	\$0.14	\$1.35	\$1.35	\$1.35	
	5 EQUIPMENT	\$2,500.00	\$0.00	\$2.60	\$0.00	\$0.00	\$0.00	
	6 SPACE/PROPERTY RENT	\$2,300.00	\$0.00	\$0.15	\$0.00	\$0.00	\$0.00	
	7 SPACE/PROPERTY OWN	\$800.00	\$0.00	\$10.00	\$0.00	\$0.00	\$0.00	
	8 UTILITIES	\$275.00	\$0.00	\$2.85	\$0.00	\$0.00	\$0.00	
	9 OPERATING EXPENSES	\$100.00	\$0.00	\$1.10	\$0.00	\$0.00	\$0.00	
	10 OTHER	\$70.00	\$0.00	\$0.10	\$0.00	\$0.00	\$0.00	
Total		\$52,745.00	\$0.00	\$22.10	\$5.85	\$5.85	\$5.85	

Match Funds 1-5 of 5

Match	Budget Category	Approved Budget	Previous Cumulative Expenditure	In-Process	Expenditures for this Report	Reviewed Amount	Current Cumulative Expenditures
	1 SALARY	\$3,607.50	\$0.00	\$0.20	\$0.00	\$0.00	\$0.00
	2 FRINGE	\$0.00	\$0.00	\$0.30	\$0.00	\$0.00	\$0.00
	3 TRAVEL	\$1,500.00	\$0.00	\$0.30	\$0.00	\$0.00	\$0.00
	4 EQUIPMENT	\$320.00	\$0.00	\$0.20	\$0.00	\$0.00	\$0.00
	5 OPERATING EXPENSES	\$12.50	\$0.00	\$0.75	\$0.00	\$0.00	\$0.00
Total		\$5,440.00	\$0.00	\$1.75	\$0.00	\$0.00	\$0.00

Line Comments (2)

Attachments (1)

OK

Cancel

SFS Handbook: Grantee Processing in SFS

Step	Action
14.	Click the Attachments button (the number in parenthesis indicates the number of attachments).

Reimbursement Line Attachments Help

Line Attachments

Business Unit: OMH01 Claim Number: 000000167 Line Nbr: 1 Claim Type: Reimbursement

Upload Instructions
 Only PDF files can be uploaded.
 Files greater than 20 Mb will not be allowed for upload.
 Enter File Description before clicking on Add Attachment

File Description: Add Attachment

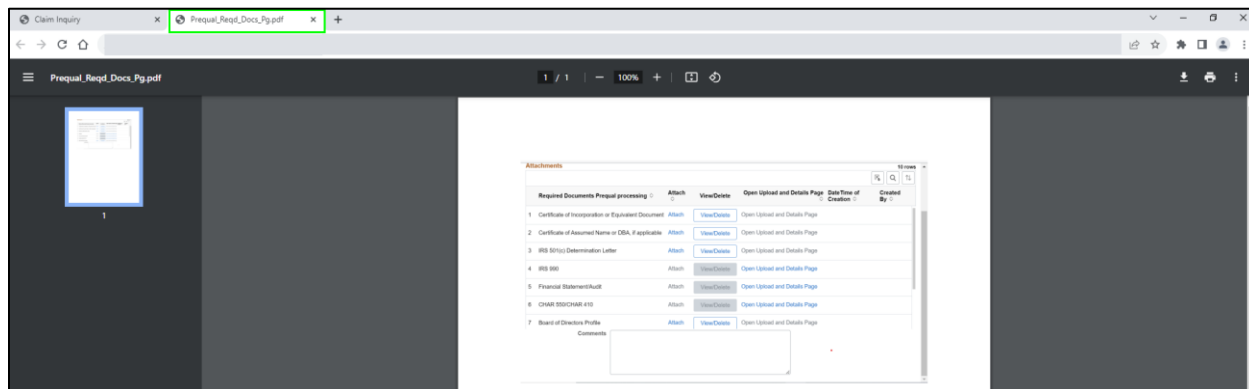
☒ Show To Supplier
☒ Show In Invoice

Line Attachments First 1 of 1 Last

File Name	Description	Show To Supplier	Show In Invoice	Created By	Created On	View Attachment
1 Prequal_Reqd_Docs_Pg.pdf	Upload Example	<input checked="" type="checkbox"/>	<input type="checkbox"/>		05/18/23 11:41:39AM	View Attachment

OK Cancel

Step	Action
15.	Click the View Attachment button.



Step	Action
16.	When you are finished reviewing the attachment, click the Close (X) button.

SFS Handbook: Grantee Processing in SFS

Reimbursement Line Attachments

Help

Line Attachments

Business Unit: OMH01 Claim Number: 000000167 Line Nbr: 1 Claim Type: Reimbursement

Upload Instructions
Only PDF files can be uploaded.
Files greater than 20 Mb will not allowed for upload.
Enter File Description before clicking on Add Attachment

File Description

☒ Show To Supplier
☒ Show In Invoice

Add Attachment

Line Attachments

First 1 of 1 Last

File Details

File Name	Description	Show To Supplier	Show In Invoice	Created By	Created On	View Attachment
1 Prequal_Reqd_Docs_Pg.pdf	Upload Example	<input checked="" type="checkbox"/>	<input type="checkbox"/>		05/18/23 11:41:39AM	<div>View Attachment</div>

OK

Cancel

Step	Action
17.	Click the OK button to return to the previous page.

SFS Handbook: Grantee Processing in SFS

Review Claims Component

Project Name: MULTI- PLATE RETHERM
Net Days in Review: 159

Contract Begin Dt: 01/24/2023
Contract Expire Dt: 01/25/2024

Bypass eSettlement Review: ☒
Claim Line No: 1
Line Type: Reimbursement
Reviewed: Yes
Contract Period: 1

Bypass Agency Voucher Approval: ☐
Claim Status: Under Agency Review
Voucher ID:
Period Amount: \$10,000.00

Budget Type: EXPENDITURE
Cost Incurred Date From: 05/08/2023
Cost Incurred Date To: 05/09/2023

Grant

Reimbursement Funds
1-10 of 10

Budget Category	Approved Budget	Previous Cumulative Expenditures	In-Process	Expenditures for this Report	Reviewed Amount	Current Cumulative Expenditures	Detail
1 SALARY	\$30,500.00	\$0.00	\$4.00	\$2.00	\$2.00	\$2.00	
2 FRINGE	\$2,000.00	\$0.00	\$1.00	\$1.00	\$1.00	\$1.00	
3 CONTRACTUAL	\$1,200.00	\$0.00	\$0.16	\$1.50	\$1.50	\$1.50	
4 TRAVEL	\$13,000.00	\$0.00	\$0.14	\$1.35	\$1.35	\$1.35	
5 EQUIPMENT	\$2,500.00	\$0.00	\$2.60	\$0.00	\$0.00	\$0.00	
6 SPACE/PROPERTY RENT	\$2,300.00	\$0.00	\$0.15	\$0.00	\$0.00	\$0.00	
7 SPACE/PROPERTY OWN	\$800.00	\$0.00	\$10.00	\$0.00	\$0.00	\$0.00	
8 UTILITIES	\$275.00	\$0.00	\$2.85	\$0.00	\$0.00	\$0.00	
9 OPERATING EXPENSES	\$100.00	\$0.00	\$1.10	\$0.00	\$0.00	\$0.00	
10 OTHER	\$70.00	\$0.00	\$0.10	\$0.00	\$0.00	\$0.00	
Total	\$52,745.00	\$0.00	\$22.10	\$5.85	\$5.85	\$5.85	

Match Funds
1-5 of 5

Budget Category	Approved Budget	Previous Cumulative Expenditure	In-Process	Expenditures for this Report	Reviewed Amount	Current Cumulative Expenditures
1 SALARY	\$3,607.50	\$0.00	\$0.20	\$0.00	\$0.00	\$0.00
2 FRINGE	\$0.00	\$0.00	\$0.30	\$0.00	\$0.00	\$0.00
3 TRAVEL	\$1,500.00	\$0.00	\$0.30	\$0.00	\$0.00	\$0.00
4 EQUIPMENT	\$320.00	\$0.00	\$0.20	\$0.00	\$0.00	\$0.00
5 OPERATING EXPENSES	\$12.50	\$0.00	\$0.75	\$0.00	\$0.00	\$0.00
Total	\$5,440.00	\$0.00	\$1.75	\$0.00	\$0.00	\$0.00

OK

Cancel

Line Comments (2)

Attachments (1)

Step	Action
18.	Click the OK button to return to the previous page.

SFS Handbook: Grantee Processing in SFS

My Homepage

Claim Review Summary

Claim Review Summary

Header Details

Business Unit: OMH01

Supplier Name: [REDACTED]

Supplier ID: 1000016490

Supplier Location: MAINEPAY

Description: OMH01-C00014GM-1090004

Project Name: MULTI- PLATE RETHERM

Contract Begin Dt: 01/24/2023

Contract Expire Dt: 01/25/2024

Claim Number: 000000167

Contract ID: 000000000000000000117523

Contract Max Amount: \$10,000.00

Grantee Claim Reference: 051823_TB_inv2

Claim Date: 05/18/2023

Net Days in Review: 159

MIR Adjustment Date:

Claim Type: Regular

Claim Initiated Dt:

Claim Received Dt:

Final Approval Dt:

Bypass eSettlement Review ☒

Bypass Agency Voucher Approval ☐

Claim Status: Under Agency Review

Voucher ID:

Approval Step: 2

Line Details

1 of 1

Last

Line #	Line Type	Contract Period	Contract Period Amount	Requested Amount	Reviewed Amount	Net Payment Amount	Reviewed	Modified By	Modified On
1	Reimbursement	1	\$10,000.00	\$5.85	\$5.85	\$5.85	Yes	PeaceInc	10/24/2023 8:13:32AM

Claim Comments

Comment entered by proxy

Last Comment Added By : AM

On : 05/18/2023 - 11:40

Header Comments (1)

Workflow Comments (2)

Add Comment

☒ Show to Supplier

☐ Show in Invoice

Save

Cancel

Attachments (0)

Preview Claim

View Approvals

Step	Action
19.	Click the Header Comments link to view any header comments for the claim.
20.	Click the Workflow Comments link to view workflow comments for the claim.
21.	Click the Attachments button to view any header attachments for the claim.
22.	Click the Preview Claim link to view the pdf version of the claim. Note: Once the claim is approved, the preview claim link will be grayed out and the claim pdf is only accessible as an attachment via the Attachments button.
23.	You have successfully completed the Claim Inquiry topic.

SFS Handbook: Grantee Processing in SFS

Grantee Reports and Queries

Lesson Description:

This lesson provides the knowledge and skills to process grantee reports and queries.

Lesson Objectives:

In this lesson, you will learn how to:

- Run the Vendor Contract Summary Report

Run the Vendor Contract Summary Report

Topic Description:

This topic provides the knowledge and skills to run the Vendor Contract Summary report. This report provides grant related contract and bid event data at a summary level.

Topic Objectives:

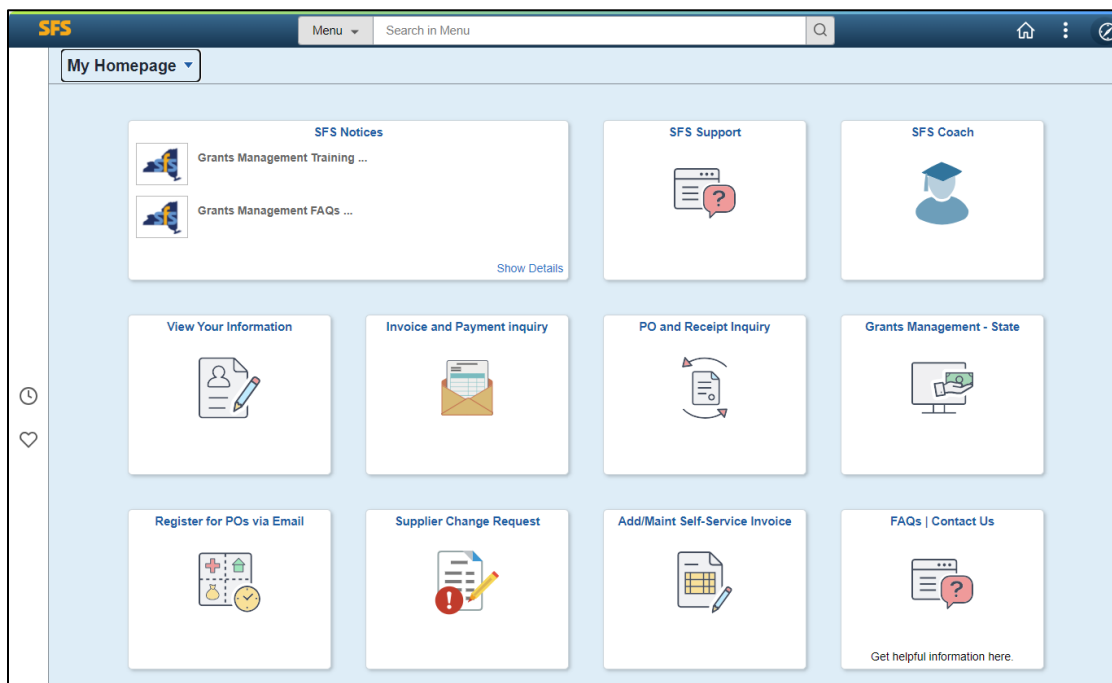
In this topic, you will learn:

- How to run the Vendor Contract Summary report.

Procedure

Scenario: You would like to review grant related contract and bid event data at a summary level so you will run the Vendor Contract Summary report.

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.



SFS Handbook: Grantee Processing in SFS

Step	Action
1.	From the NavBar navigate to: Menu > Manage Contracts > Vendor Contract Summary Report

[illegible]

Step	Action
2.	<p>Enter the applicable values in the search criteria fields which consist of the following fields:</p> <p>SetID, Business Unit, Bid Event ID, Vendor Type, Vendor ID, Contract ID, NYS Contract Number, Contract Status, Contract Type, Contract Begin Date, Contract Expire Date, Period, Period From Date, and Period To Date.</p> <p>Note:</p> <ul style="list-style-type: none"> SetID defaults to SHARE and doesn't need to be changed. SetID and Business Unit are required fields. Business Unit is the SFS ID for the NYS Agency.
3.	Click the View Results button to display the search results based on the entered search criteria.

WY_ES_CONTRACT_SUMMARY_QRY - Vendor Contract Summary Report

Select [SHARE]

*Business Unit

Bid Event ID

Vendor Type

Vendor ID

Contract ID

NYS Contract Number

Contract Status

Contract Type

Contract Begin Date

Contract Expire Date

Period

Period From

Period To

[View Results](#)

Download results in Excel Spreadsheet CSV Text File XML File (.S40 xls)

First 1-100 of 1029 (3) Last

Row	Business Unit	Contract ID	NYS Contract Number	Bid Event ID	Bid Event Name	Organization Type	Vendor ID	Vendor Name	Contract Type	Contract Status	Contract Begin Date	Contract Expire Date	Contract Amount	Period	Period From	Period To	Project ID	Project Description
1	OMH01	000000000000000000000009999	OMH01-CO022TGG-365000		NPFT		1000006268		FT	A	12/07/2015	12/06/2020	1614625.000					
2	OMH01	00000000000000000000009549	OMH01-C20919G-365000		NPFT		1000026159		MY	P	01/01/2020	12/31/2024	3919087.000	2	01/01/2021	12/31/2021	000000000062024	
3	OMH01	00000000000000000000006549	OMH01-C20919G-365000		NPFT		1000026159		MY	P	01/01/2020	12/31/2024	3919087.000	3	01/01/2022	12/31/2022	000000000062024	
4	OMH01	00000000000000000000009549	OMH01-C20919G-365000		NPFT		1000026159		MY	P	01/01/2020	12/31/2024	3919087.000	1	01/01/2020	12/31/2020	000000000062024	
5	OMH01	00000000000000000000007576	OMH01-C21183GG-365000		NPFT		1000001583		MY	P	07/01/2020	12/31/2025	1200000.000	2	01/01/2021	12/31/2021	20B1NYCM#SZ	
6	OMH01	00000000000000000000007576	OMH01-C21183GG-365000		NPFT		1000001583		MY	P	07/01/2020	12/31/2025	1200000.000	1	07/01/2020	12/31/2020	20B1NYCM#SZ	
7	OMH01	00000000000000000000008909	OMH01-C21282GG-365000		NPFT		1000003121		MY	C	07/01/2021	06/30/2026	319962.000	1	07/01/2021	06/30/2022	0000000000061713	
8	OMH01	00000000000000000000008909	OMH01-C21282GG-365000		NPFT		1000003121		MY	C	07/01/2021	06/30/2026	319962.000	2	07/01/2022	06/30/2023	0000000000061713	
9	OMH01	00000000000000000000009999	OMH01-C21366GG-365000		NPFT		1000007607		FT	P	07/01/2021	06/30/2022	300000.000	1	07/01/2021	06/30/2022	000000000046938	
10	OMH01	00000000000000000000010293	OMH01-C2224KG-365000		NPFT		1000027285		MY	P	04/01/2022	12/31/2026	3938004.000	1	04/01/2022	12/31/2022	0000000000046812	
11	OMH01	000000000000000000000010364	OMH01-C21699GG-365000		NPFT		1000024165		MY	P	07/15/2021	12/31/2024	3625252.000	1	07/15/2021	12/31/2021	0000000000091514	

SFS Handbook: Grantee Processing in SFS

Step	Action
4.	Review the search results which consists of the following data elements: Business Unit, Contract ID, NYS Contract Number, Bid Event ID, Bid Event Name, Organization Type, Vendor ID, Vendor Name, Contract Type, Contract Status, Contract Begin Date, Contract Expire Date, Contract Amount, Period, Period From Date, Period To Date, Project ID, and Project Description.
5.	Note: The results can be downloaded into an Excel Spreadsheet , a CSV Text File , or an XML File by clicking on the appropriate link.
6.	You have successfully completed the Run the Vendor Contract Summary Report topic.