



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

Published Date: June 27, 2024

SFS Handbook: Grantee Processing in SFS

Table of Contents

Grantee Processing in SFS	3
Searching and Viewing Bid Events (Grant Opportunities)	4
Search for a Bid Event (Grant Opportunity) on the SFS Public Portal	4
Subscribing to Email Notifications	10
Subscribe to Email Notifications	10
Modifying Email Notifications	12
Modify Email Notifications	12
Maintaining Grantee Information	14
View and Update Grantee Information	14
Adding a Grant Contract Approver's Name to their Profile in SFS	19
Managing Prequalification Applications	22
Enter and Submit a Prequalification Application	23
Responding to Bid Events (Grant Opportunities)	50
Respond to Bid Event Expenditure Budget Types	51
Respond to Bid Event Performance Budget Types.....	70
Respond to Bid Event Capital Budget Types	91
Using the Match Worksheet for a Bid Response	111
View Submitted Bid Responses	119
Reviewing and Approving Grant Contracts	136
Preview a Contract Agreement	136
Update Contract Period Budget and Work Plan Information and Complete Review of a Contract during Collaboration	141
Apply an Electronic Signature to a Contract Agreement.....	155
Complete Performance Measures for a Progress Report and Submit a Progress Report for Agency Review.....	163
Update and Re-submit a Returned Progress Report	170
Entering and Maintaining Grant Claims	175
Enter a New Claim – Advance/Initial Amount	176
Enter a New Claim - Reimbursement Amount	185
Update an Existing Claim	195
Update a Returned Claim.....	198
Claim Inquiry.....	206
Grantee Reports and Queries	216
Run the Vendor Contract Summary Report	216

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 grants management activities using the [Statewide Financial System \(SFS\) Public Portal](#) and 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.

The Statewide Financial System (SFS) is New York State (NYS) government's accounting and financial management system used to manage contracts and payments.

Using SFS, Agencies post grant opportunities in the form of bid events. From the SFS Public Portal, prospective grantees and the general public can search for grant opportunities (also known as bid events) and sign up to receive grant notifications.

Prospective grantees interested in responding to a grant opportunity must have credentials to access* the SFS Vendor Portal and be prequalified. Prequalification is a process applicable to Non-profits (or other organizations as defined by State policy) that requires the completion and acceptance of an online application to compete for state funding. Non-profits complete prequalification applications and submit them for agency review. Agencies are responsible for reviewing submitted prequalification applications and taking action on the application (e.g., approving it or returning it back for additional information).

Prequalified grantees log in to the SFS Vendor Portal to submit their bid response to the agency for review. The agency scores and reviews 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. Grantees collaborate with agencies on grant contract development and approval.

Once a grant contract has been approved, grantees can initiate and submit progress reports in the SFS Vendor Portal for agency review and approval. Grantees are encouraged to discuss the process for submitting claims with the agency they are doing business with, to confirm how payments will be processed based on the terms of the contract agreement.

***Note:** The SFS Delegated Administrator (Admin) within each organization is responsible for managing SFS Vendor Portal account changes, designating roles for User IDs within their organization, and managing address and contact information. Roles control what an individual has access to do and the tasks they can perform in the SFS Vendor Portal. Additional information regarding roles can be found in the [SFS Vendor Role Guide](#) and the [Vendor Portal Access Reference Guide](#).

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

SFS Handbook: Grantee Processing in SFS

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.

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

SFS role required to perform this task:

- No role required. Users do not need to log in to SFS to search for grant opportunities on the SFS Public Portal.

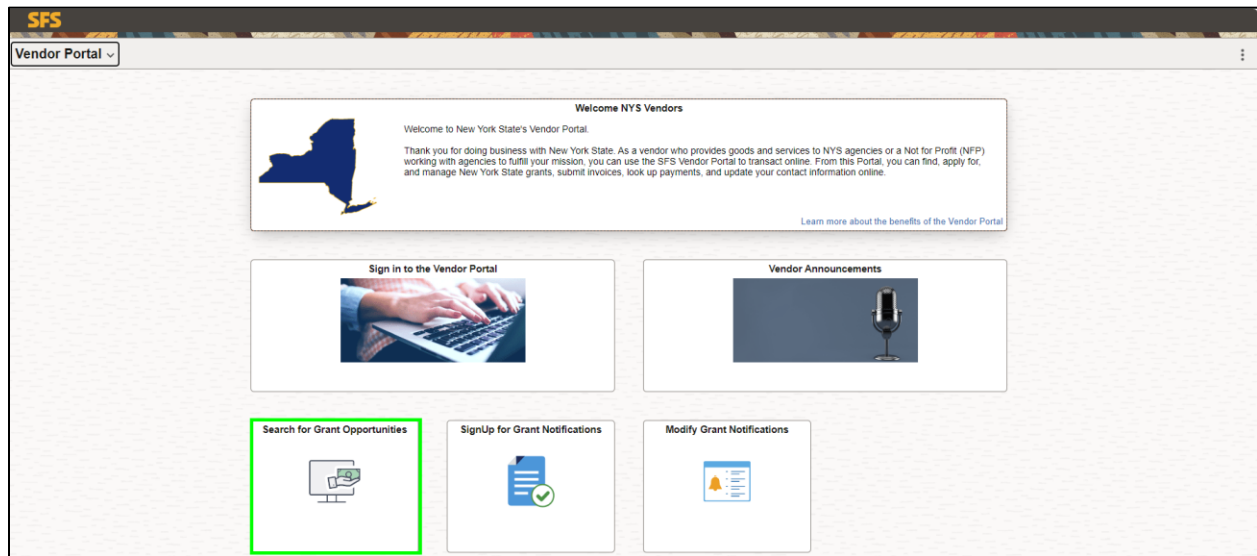
Procedure

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.

SFS Handbook: Grantee Processing in SFS

Step	Action
1.	Navigate to the 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.



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

SFS Handbook: Grantee Processing in SFS

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 From To

Search by Status **Available**

Search by Eligibility

Search by Funding Agency

Search by Service Area **Environmental Supp**

Search Clear Criteria

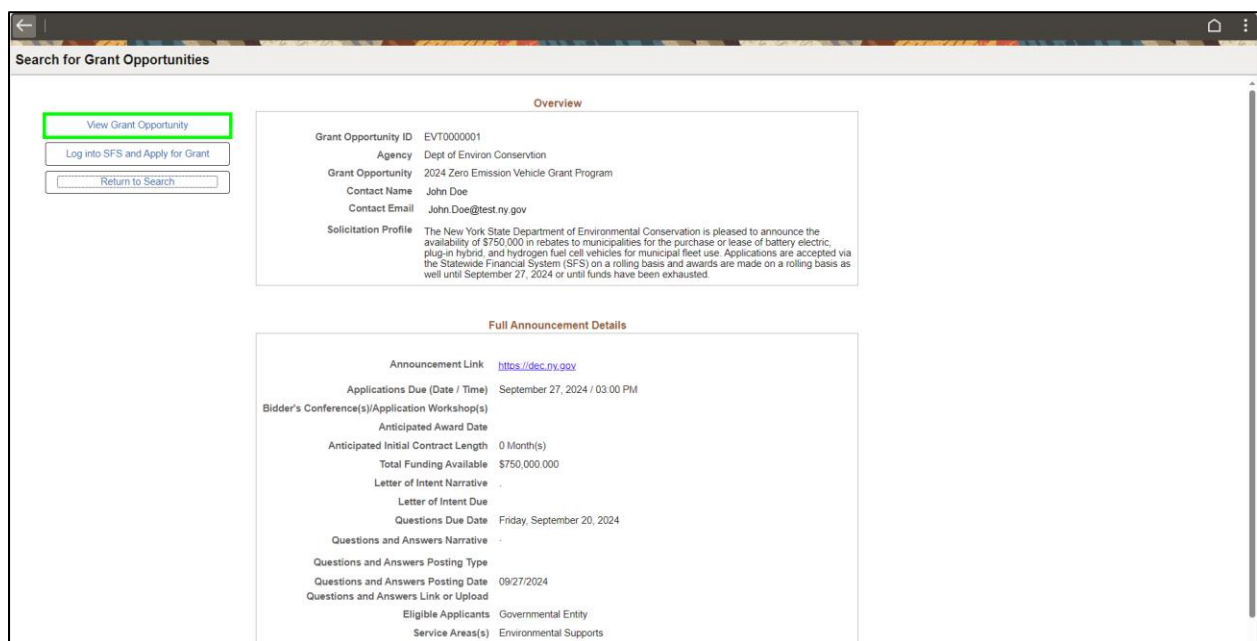
Search Results

Event ID ↓	Funding Agency	Grant Opportunity	Status	Eligibility	Availability Date ↓	Anticipated Release Date	Due Date ↑
EVT0000001	AGM01	Climate Resilient Farming Round 8	Advertised Only - Not in SFS	Governmental Entity	05/01/24 12:00AM	05/01/24 12:00AM	06/24/2024 5:00PM EDT
EVT0000001	DEC01	2024 Zero Emission Vehicle Grant Program	Available	Governmental Entity	04/25/24 9:00AM	04/26/24 8:00AM	09/27/2024 3:00PM EDT
EJICIG 11	DEC01	EJ Community Impact Grant	Available	Not-For-Profit	03/29/24 12:30PM	04/29/24 8:00AM	08/07/2024 3:00PM EDT

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: Represents summary information about an upcoming Bid Event (grant opportunity) which is provided for review only. Bid Responses (applications) cannot be started until the Bid Event becomes Available (published). <ul style="list-style-type: none"> ○ Includes only bid events in “Anticipated” status in the search results. • Available: Represents a Bid Event (grant opportunity) that is available for review and open for potential grantees to start a Bid Response (application). Bid Responses can be submitted beginning on the Event Start Date. <ul style="list-style-type: none"> ○ Includes bid events in “Available” and “Advertised Only-Not if SFS” statuses in the search results. ○ Note: “Advertised Only – Not in SFS” status represents summary information about a grant opportunity managed outside of SFS and is provided for review only. Directions on where to find additional information about the grant opportunity, including where to apply, are provided. • Anticipated and Available: Includes bid events in “Anticipated”, “Available”, and “Advertised Only-Not if SFS” statuses in the search results. • Closed: Includes only bid events where the end date has passed, and grantees can no longer bid on the grant opportunity.

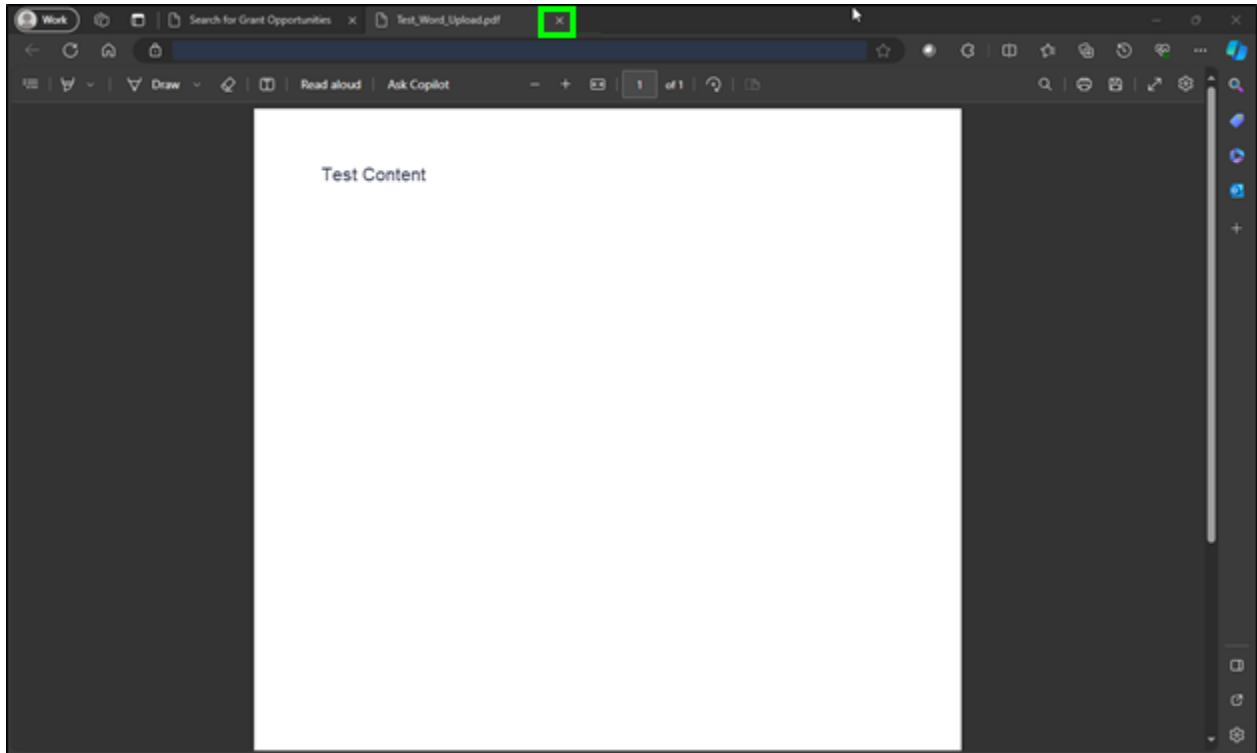
SFS Handbook: Grantee Processing in SFS

Step	Action
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>

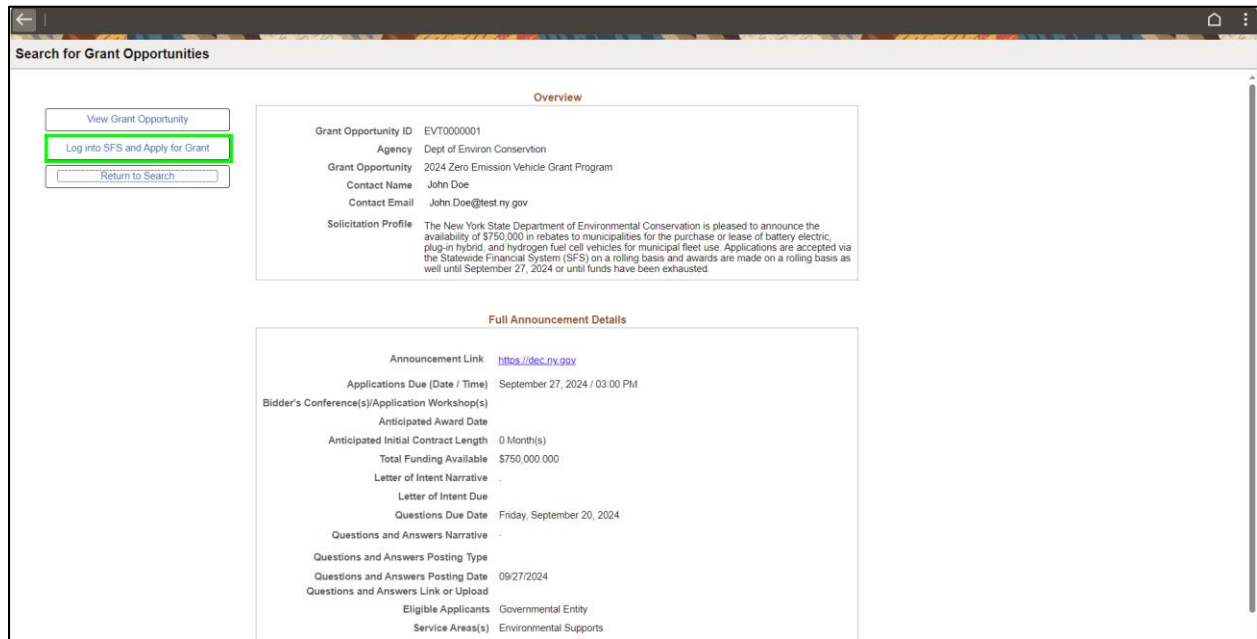


Step	Action
11.	Click the View Grant Opportunity button to view the Request for Proposal (RFP) pdf associated to the grant opportunity.

SFS Handbook: Grantee Processing in SFS

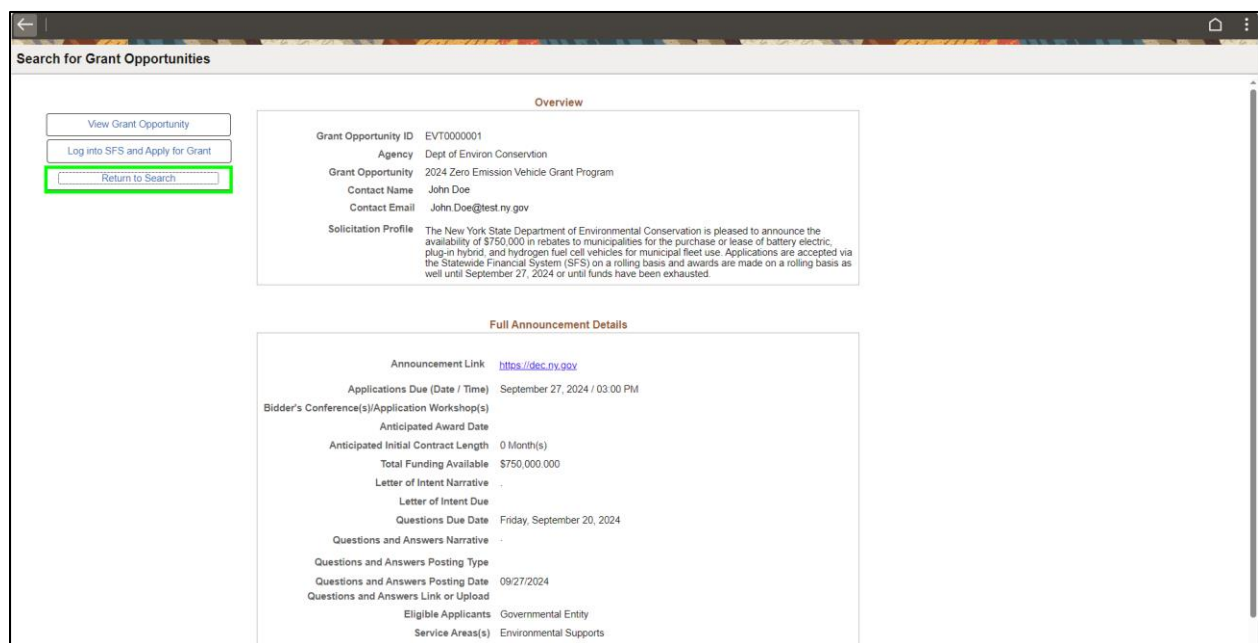


Step	Action
12.	Click the Close (X) browser tab when you are finished viewing the Request for Proposal (RFP) pdf associated to the grant opportunity.



SFS Handbook: Grantee Processing in SFS

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, access the Grants Management website for instructions on how to register your organization. (https://grantsmanagement.ny.gov/register-your-organization-sfs).</p>



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.

SFS Handbook: Grantee Processing in SFS

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 role required to perform this task:

- No role required. Users do not need to log in to SFS to subscribe to email notifications on the SFS Public Portal.

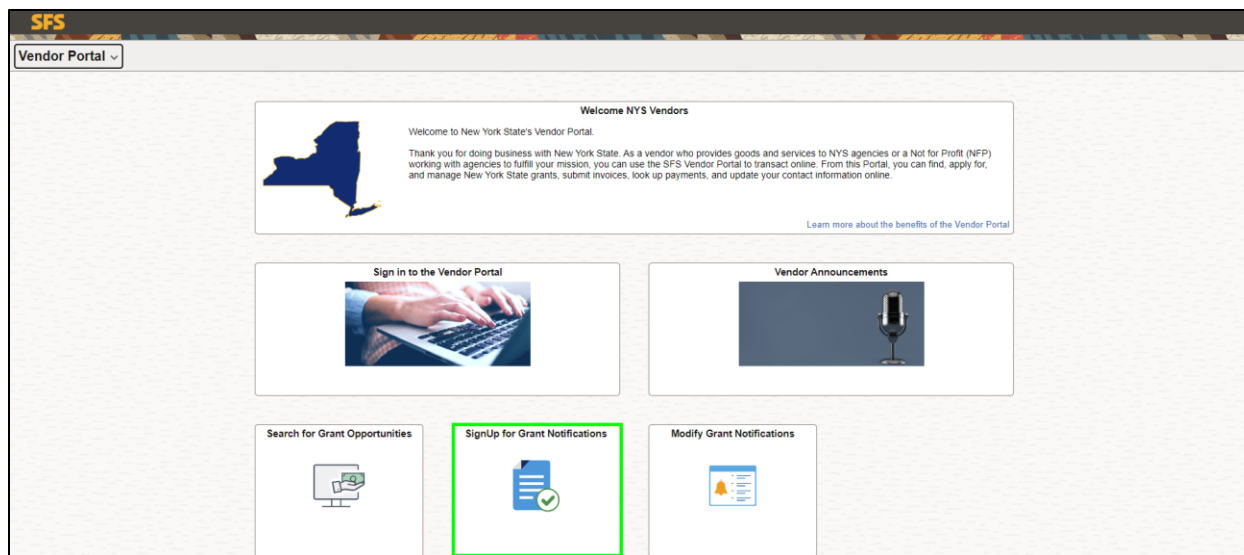
Procedure

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.

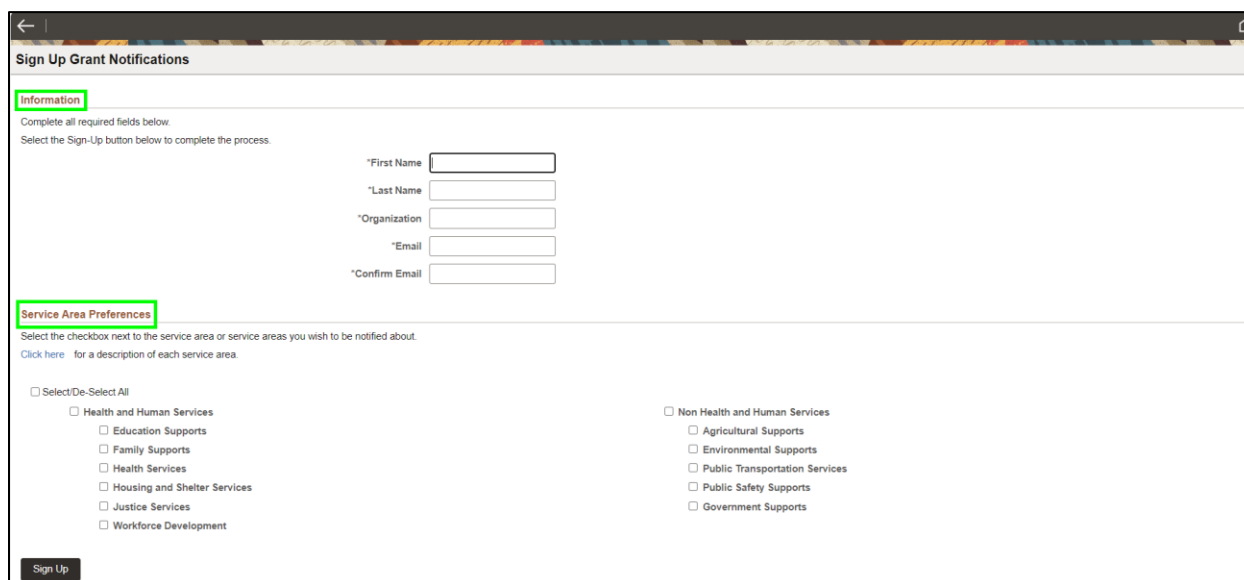
Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.

Step	Action
1.	Navigate to SFS Public Portal Homepage . Note: Users 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 SignUp for Grant Notifications tile.



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.

SFS Handbook: Grantee Processing in SFS

Step	Action
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.	<p>Note: To view description details for each Service Area, click the Click here link.</p>
12.	<p>Click the applicable Service Area checkboxes.</p>
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.	<p>You have successfully completed the Subscribing to Email Notifications topic.</p>

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.

SFS role required to perform this task:

- No role required. Users do not need to log in to SFS to modify contact information and/or service area preferences previously selected for email notifications.

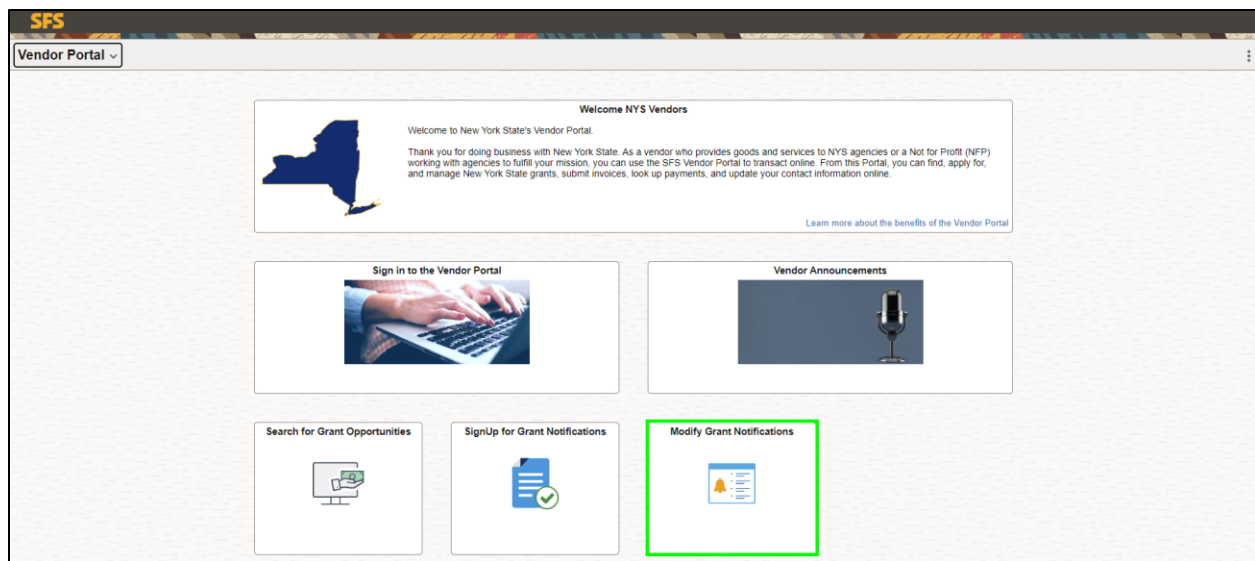
Procedure

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.

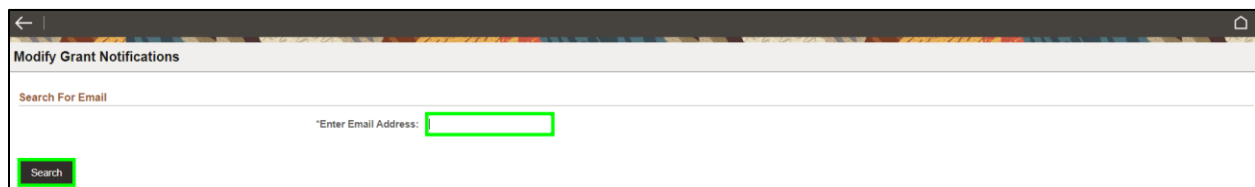
SFS Handbook: Grantee Processing in SFS

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.



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



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

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

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

SFS Handbook: Grantee Processing in SFS

Topic Description:

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

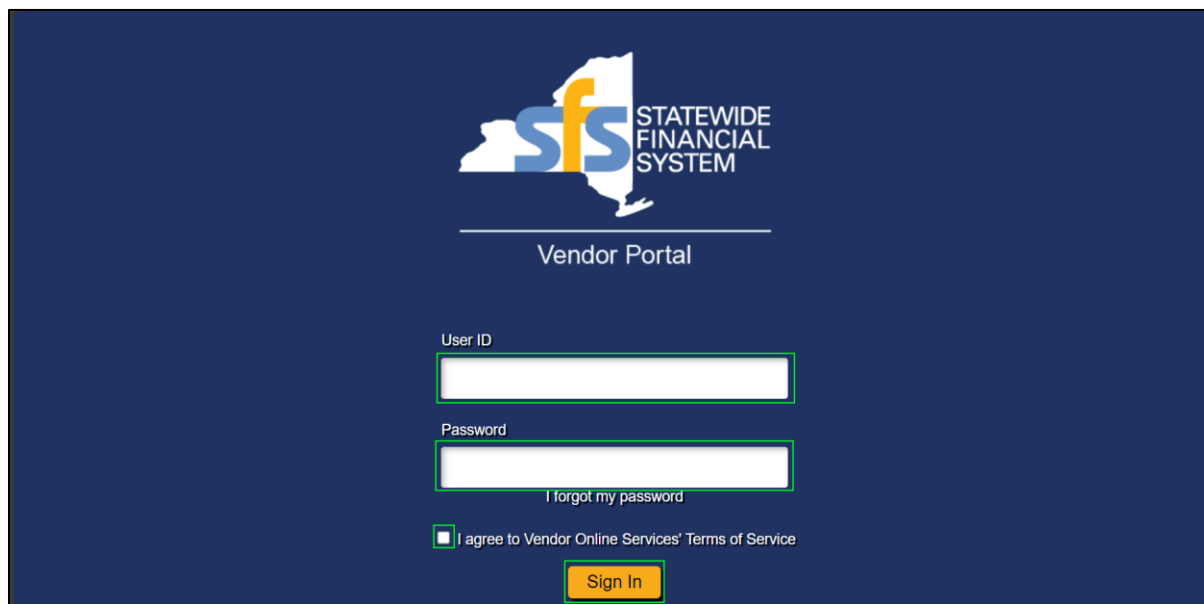
SFS role required to perform this task:

- Delegated Admin (NY_ES_SUPPLIER_ADMIN)

Procedure

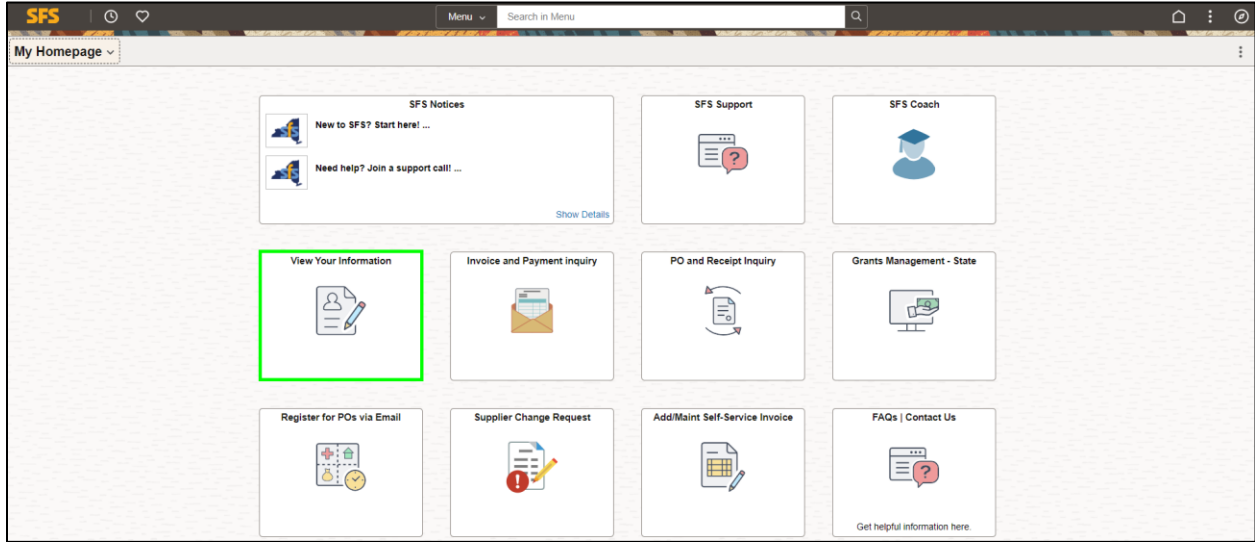
Scenario: You look up your organization's grant information in the SFS Vendor Portal and notice that some information needs to be updated. You will log in to the SFS Vendor Portal and make the applicable grant information updates before submitting for review and approval.

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.

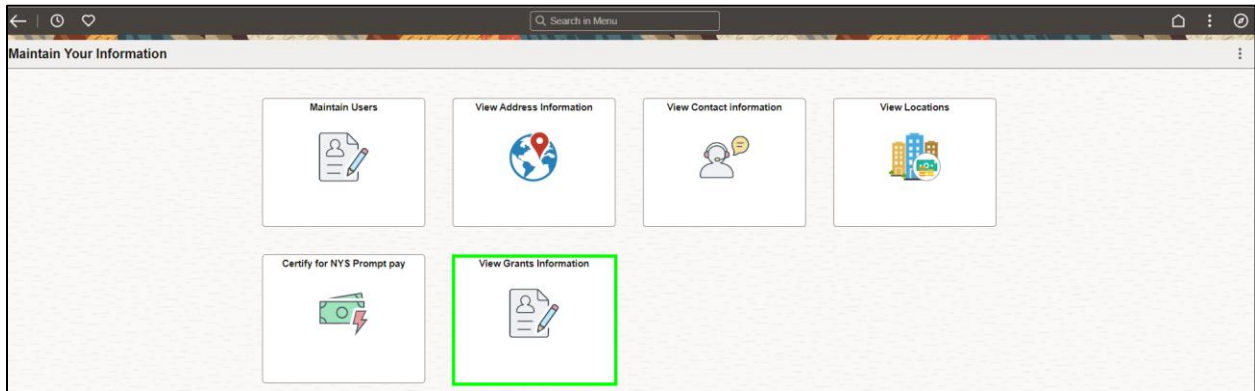


Step	Action
1.	Begin by navigating to the SFS Vendor Portal .
2.	Enter your User ID and Password and select the I agree to Vendor Online Services' Terms of Service checkbox.
3.	Click the Sign In button.

SFS Handbook: Grantee Processing in SFS

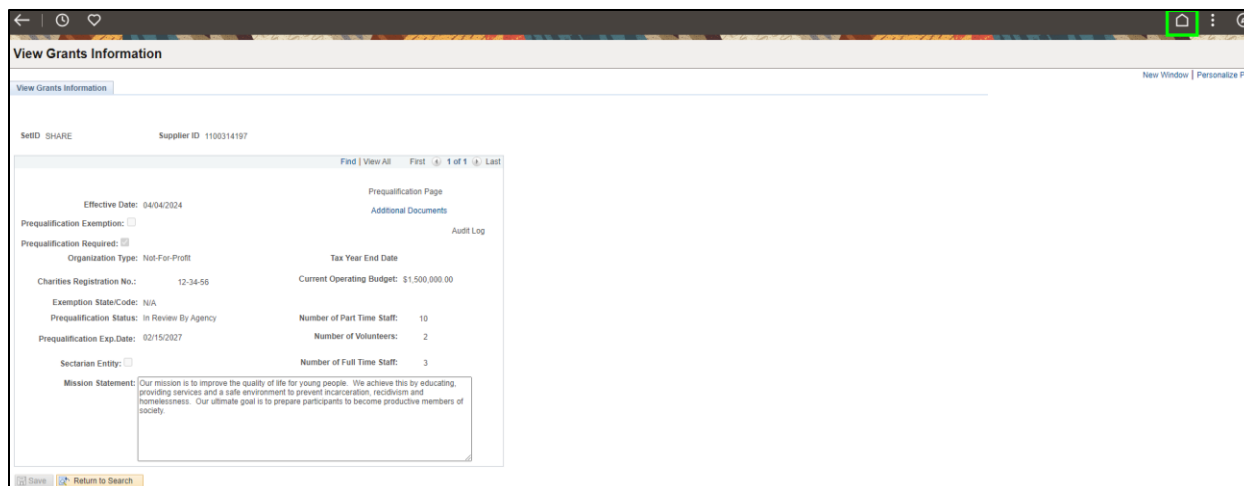



Step	Action
4.	From the Homepage click the View Your Information tile.

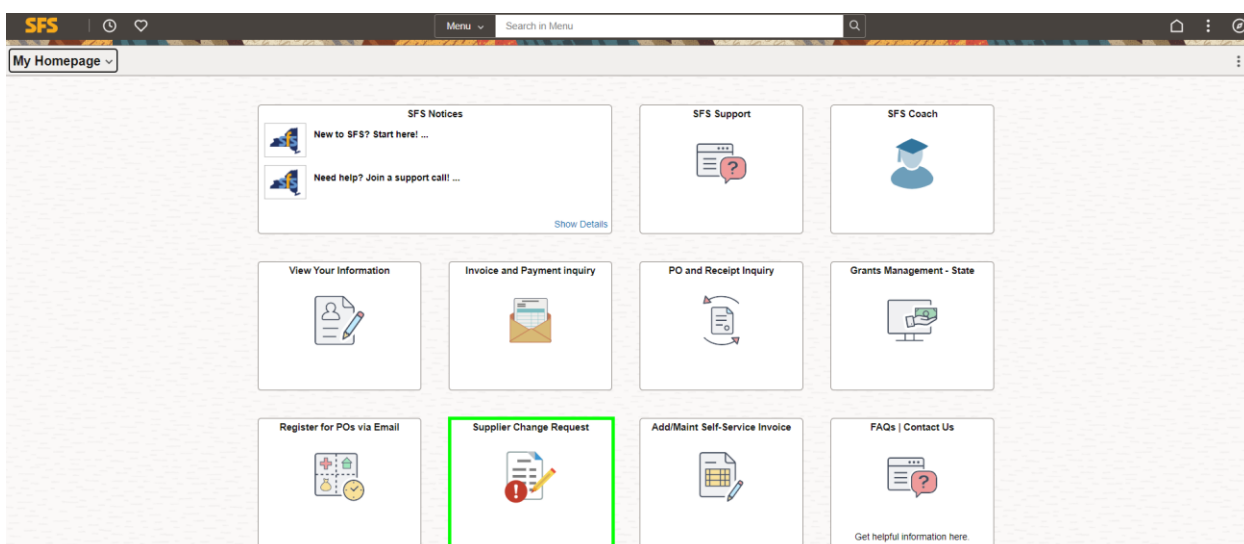


Step	Action
5.	Click the View Grants Information tile.

SFS Handbook: Grantee Processing in SFS

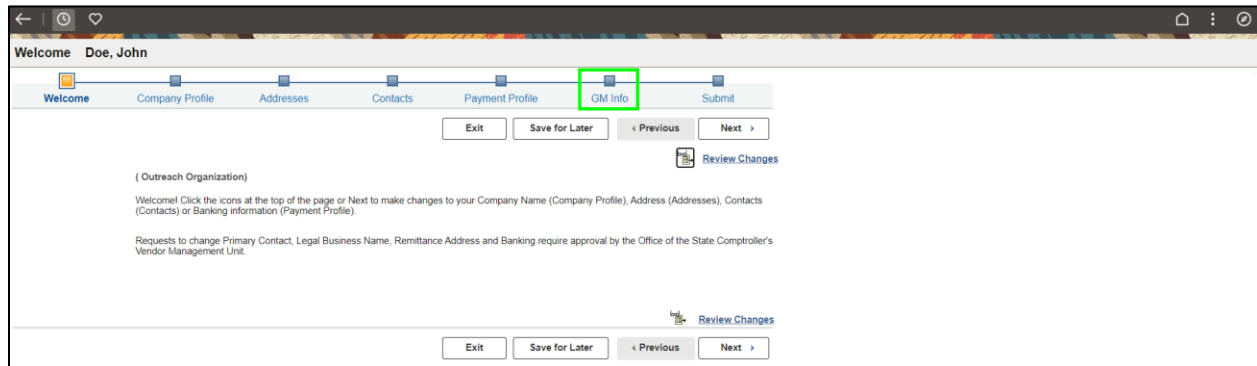


Step	Action
6.	Review the information. If changes are needed, initiate a Supplier Change Request.
7.	<p>Note:</p> <ul style="list-style-type: none"> The Supplier Change Request feature in SFS allows grantees to make changes to their organization profile, addresses, contacts, banking information, and 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.	<p>Click the Home icon to go back to the Homepage to initiate the Supplier Change Request.</p> 

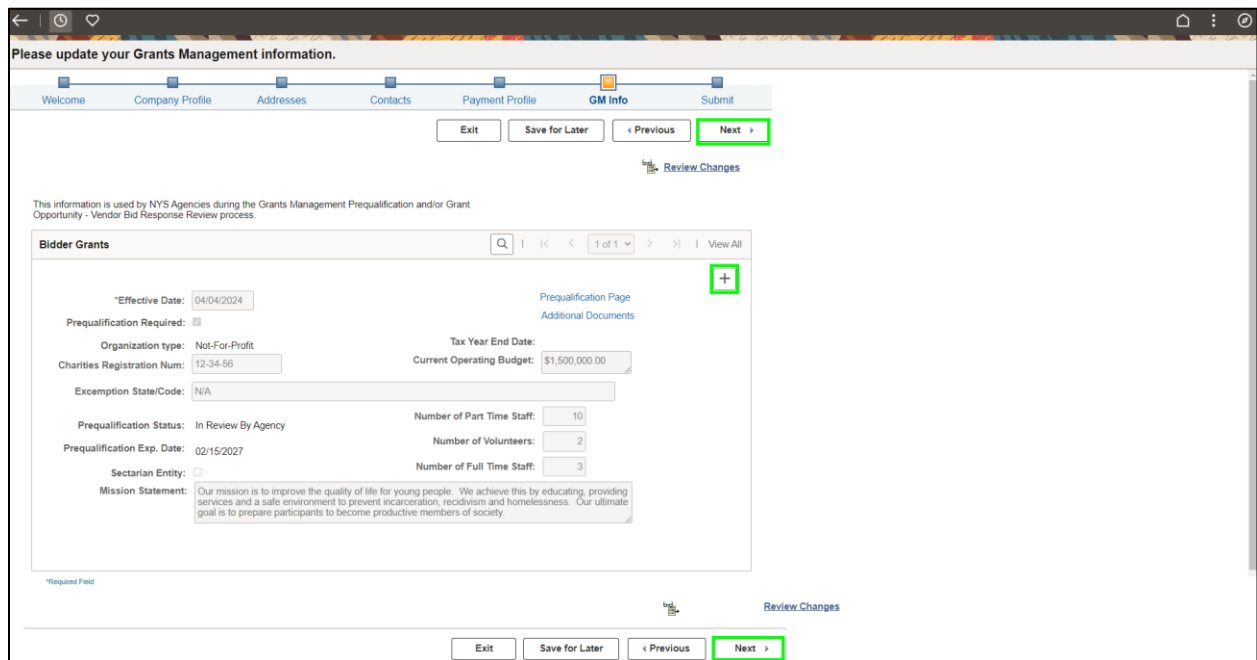


SFS Handbook: Grantee Processing in SFS

Step	Action
9.	Click the Supplier Change Request tile.



Step	Action
10.	Click the GM Info train stop.



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.

SFS Handbook: Grantee Processing in SFS

Step	Action
14.	Select the applicable Audit Reason Code . Note: Audit Reason Code classifies the type of change that was made. Some examples are: Address Change, Name Change, Corrections, etc.
15.	Enter any additional information in the Comments field to clarify what was changed. Note: Comments are optional.
16.	Select Confirm Changes checkbox.
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

SFS role required to perform this task:

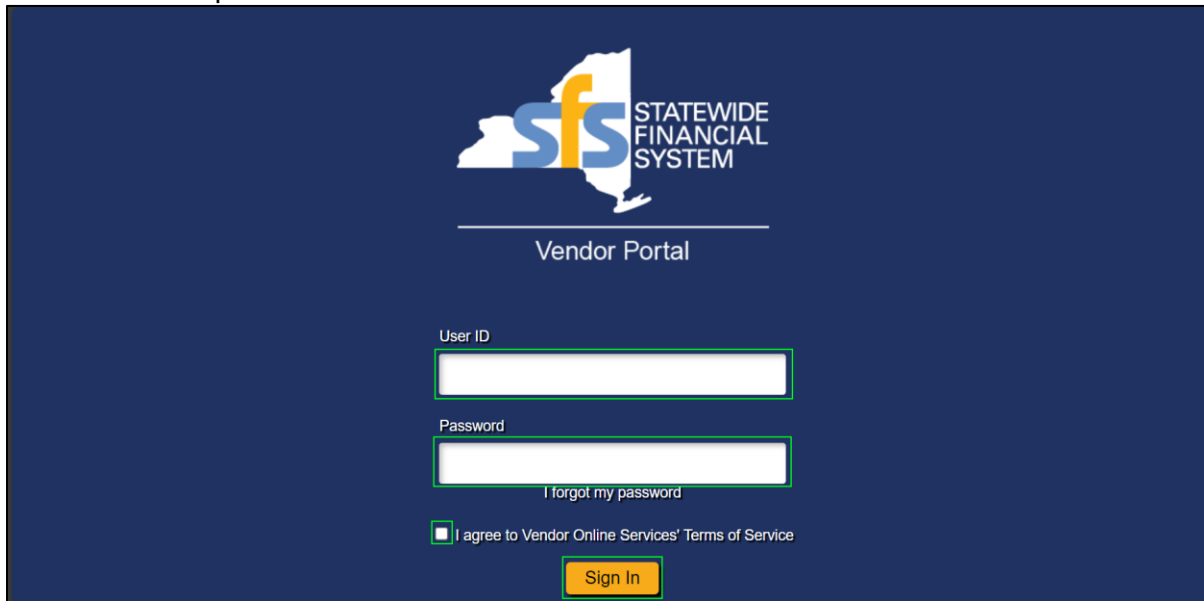
SFS Handbook: Grantee Processing in SFS

- Delegated Admin (NY_ES_SUPPLIER_ADMIN)

Procedure

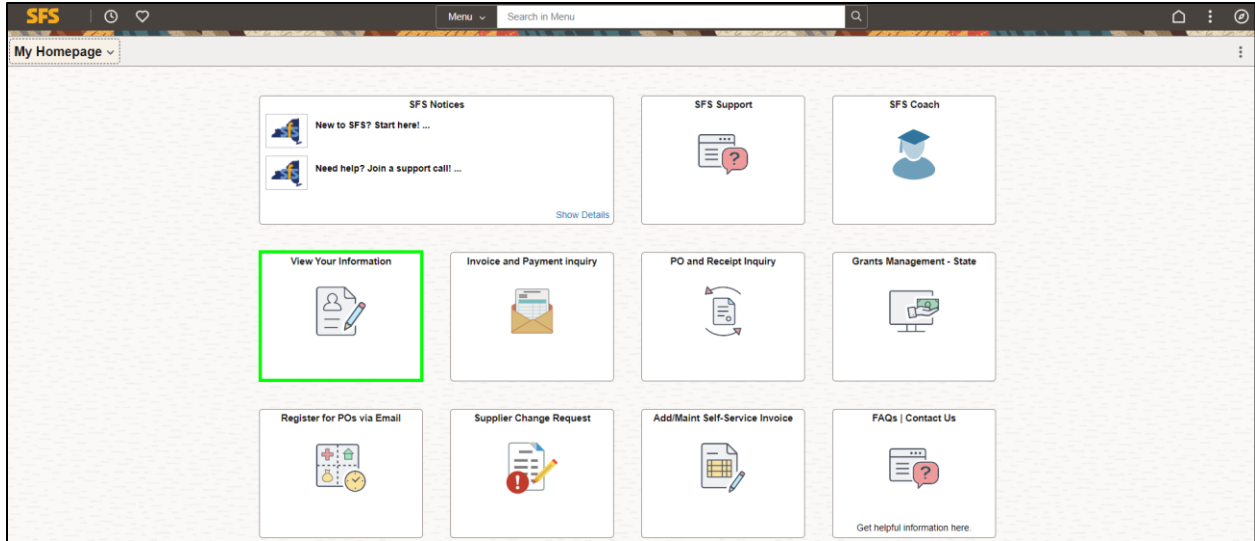
Scenario: As a Delegated Administrator for your organization, you need to add the name of one of your organization’s contract approvers to their profile in SFS. This is needed so when the contract approver signs the grant contract in SFS, their name will display on the contract agreement.

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.

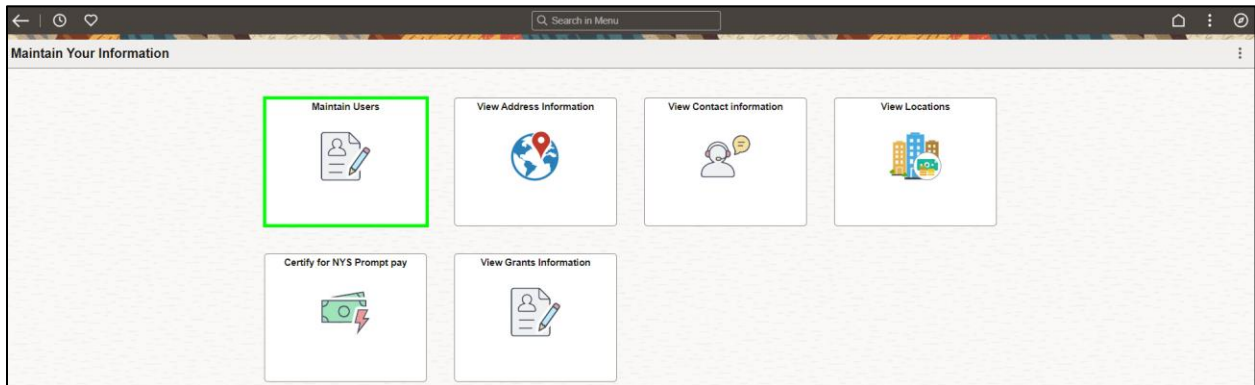


Step	Action
1.	Begin by navigating to the SFS Vendor Portal .
2.	Enter your User ID and Password and select the I agree to Vendor Online Services' Terms of Service checkbox.
3.	Click the Sign In button.

SFS Handbook: Grantee Processing in SFS

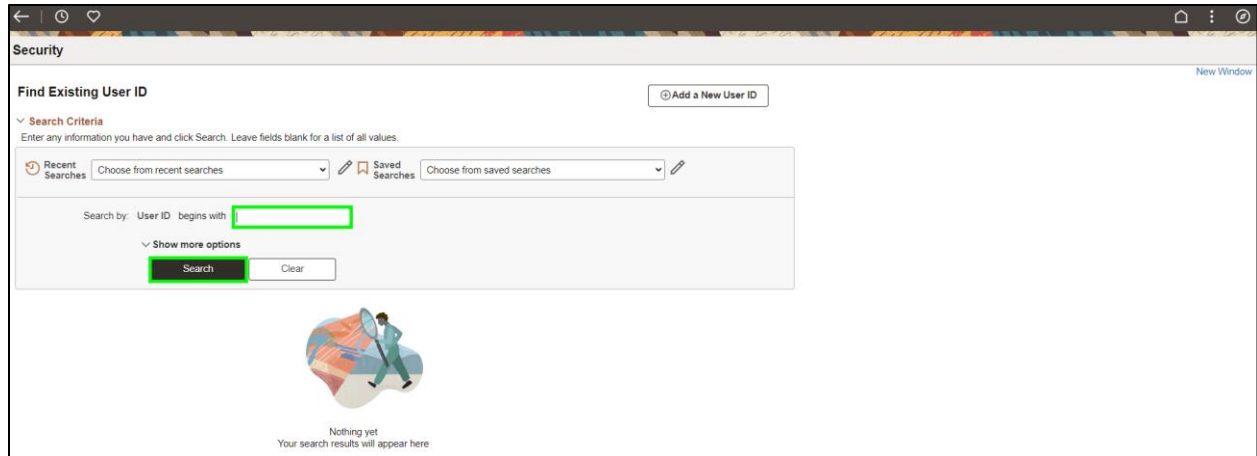


Step	Action
4.	<p>Preferred Navigation: Click the View Your Information tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > Maintain Supplier Information > Manage User Profiles.</p>

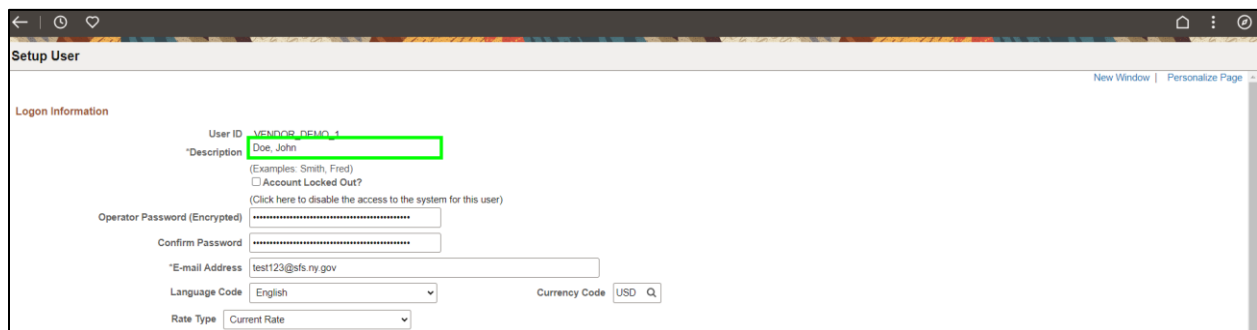


Step	Action
5.	Click the Maintain Users tile.

SFS Handbook: Grantee Processing in SFS



Step	Action
6.	Enter the contract approver's User ID in the User ID begins with field.
7.	Click the Search button.



Step	Action
8.	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.
9.	Click the Save button at the bottom of the page to save your changes.
10.	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.

SFS Handbook: Grantee Processing in SFS

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.

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

SFS role required to perform this task:

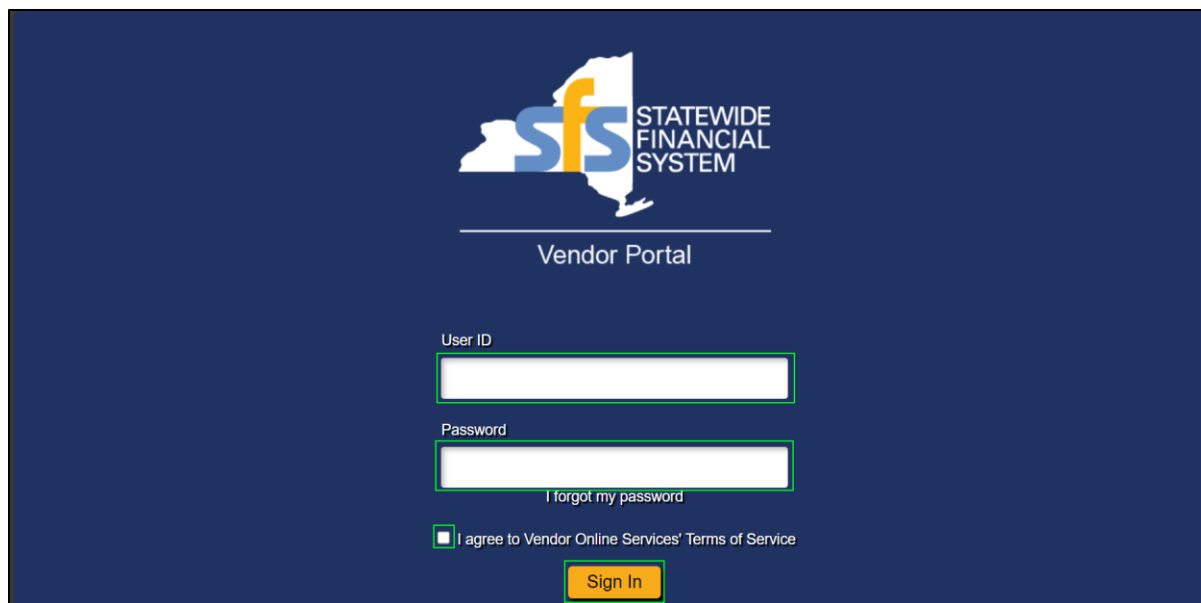
- Prequalification Processor (NY_GM_VENDOR_PREQUAL)

Procedure

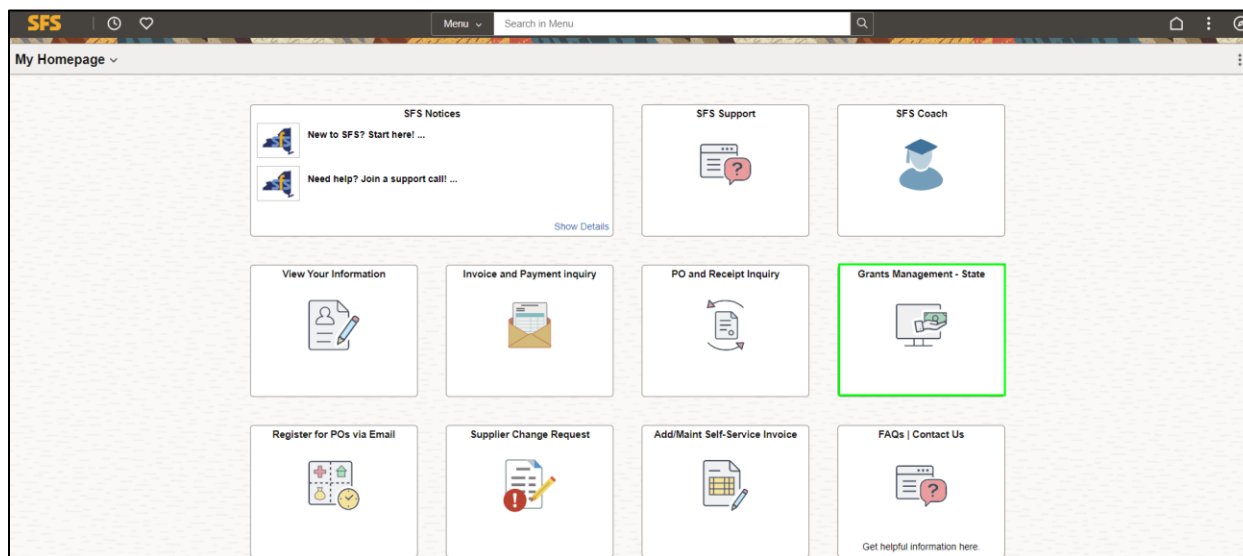
Scenario: As a Grantee User, you wish to apply for a grant, but first you must enter a Prequalification application with the Agency you are seeking the grant from. You will enter and submit a Prequalification application.

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.

SFS Handbook: Grantee Processing in SFS

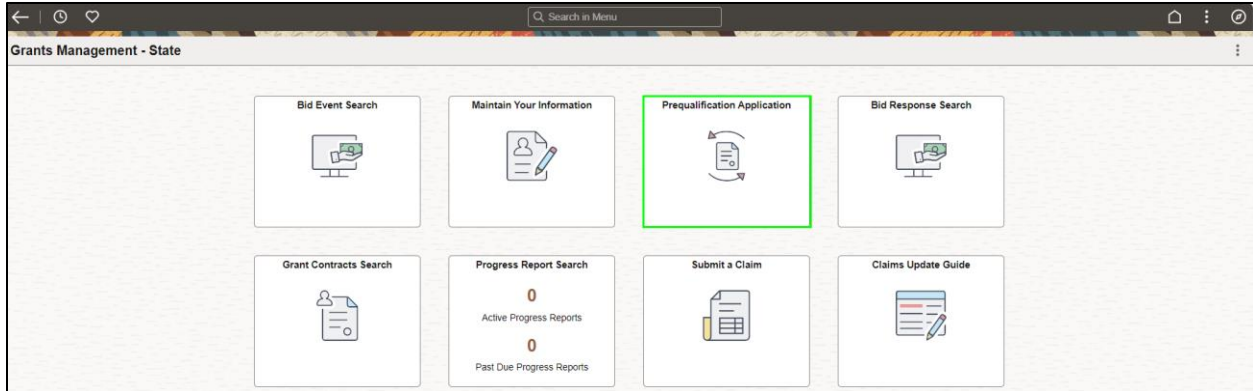


Step	Action
1.	Begin by navigating to the SFS Vendor Portal .
2.	Enter your User ID and Password and select the I agree to Vendor Online Services' Terms of Service checkbox.
3.	Click the Sign In button.

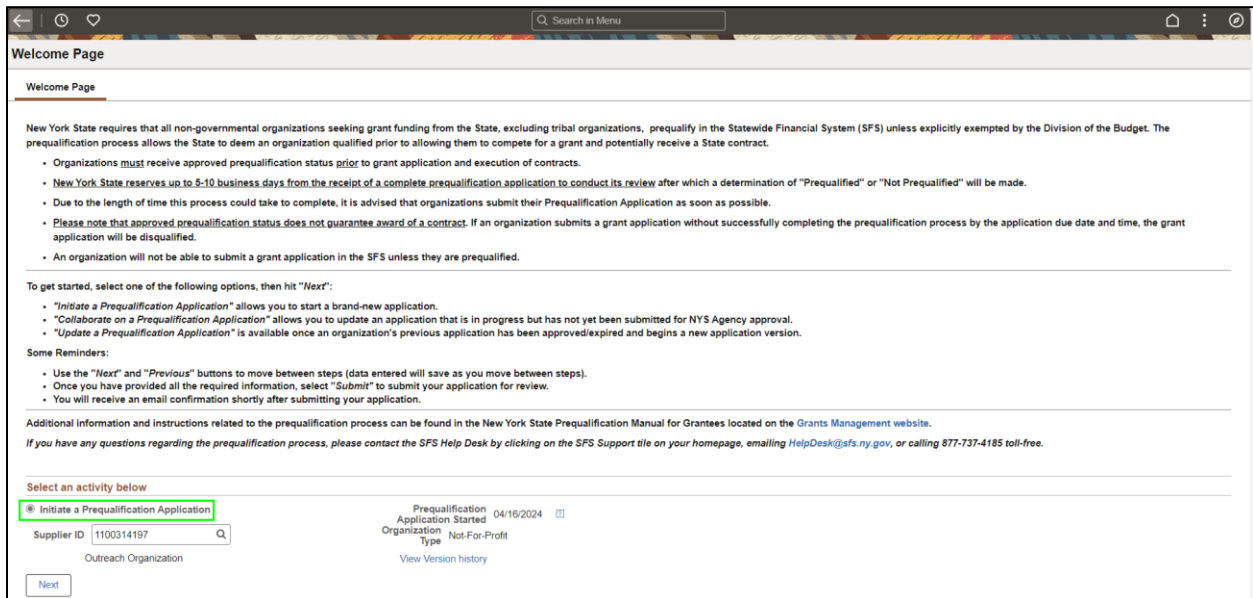


Step	Action
4.	<p>Preferred Navigation: Click the Grant Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > Manage Events and Place Bids > Prequalification.</p>

SFS Handbook: Grantee Processing in SFS

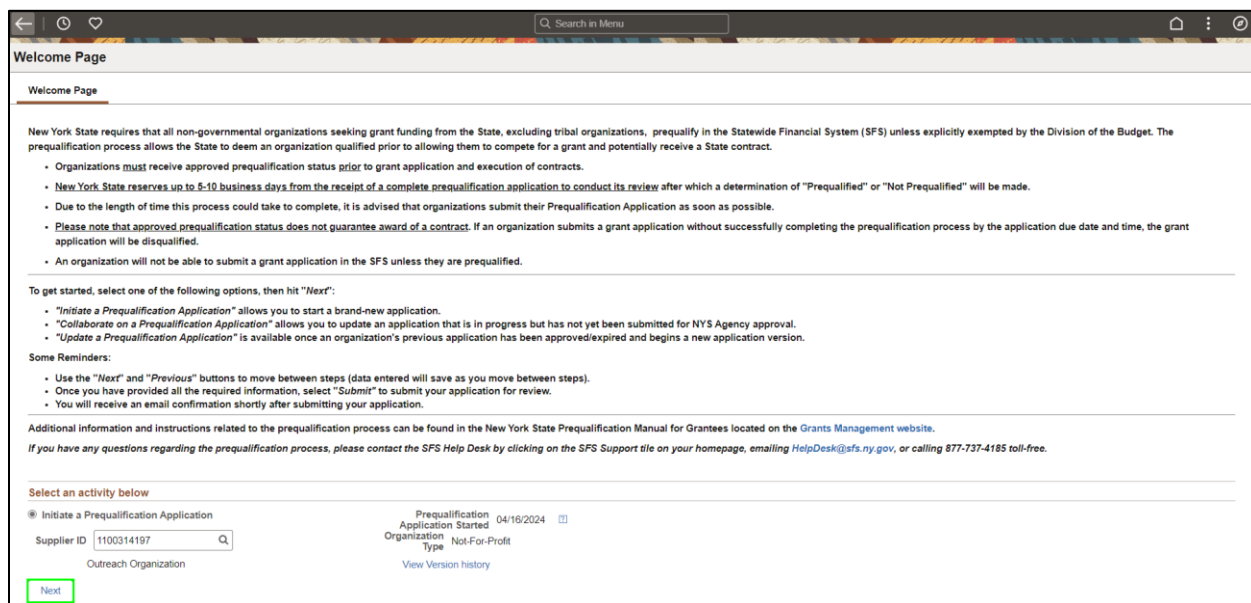


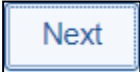
Step	Action
5.	Click the Prequalification Application tile.




SFS Handbook: Grantee Processing in SFS

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>



Step	Action
7.	<p>Click the Next button.</p> 

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> 

SFS Handbook: Grantee Processing in SFS

Cancel
Lookup

Search for: State Agency

▼ Search Criteria
Show Operators

Business Unit
(begins with)

Search
Clear

▼ Search Results

📄
☰

31 rows

Business Unit ↑↓	State Agency Name ↑↓
DOT01	Department of Transportation
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

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: 1100314197
 Supplier Information
 Supplier Name: Outreach Organization
 Email ID: test123@sfs.ny.gov

Prequalification Status: Application In Progress
 Prequalification Expiration Date
 Organization Type: Not-For-Profit

State Agency: CMH01
 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

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

1) 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

1) 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

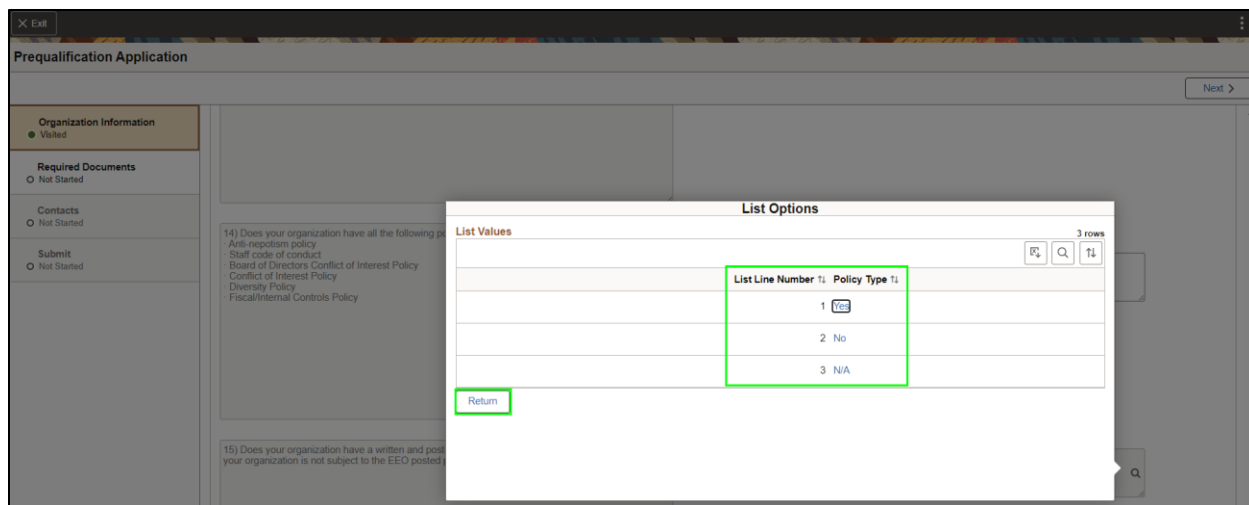
Step	Action
11.	Organizations must complete an online Prequalification application in SFS which includes answering Profile Questions regarding the organization and uploading key organizational documents. Note: Questions may vary based on your Organization Type .

SFS Handbook: Grantee Processing in SFS

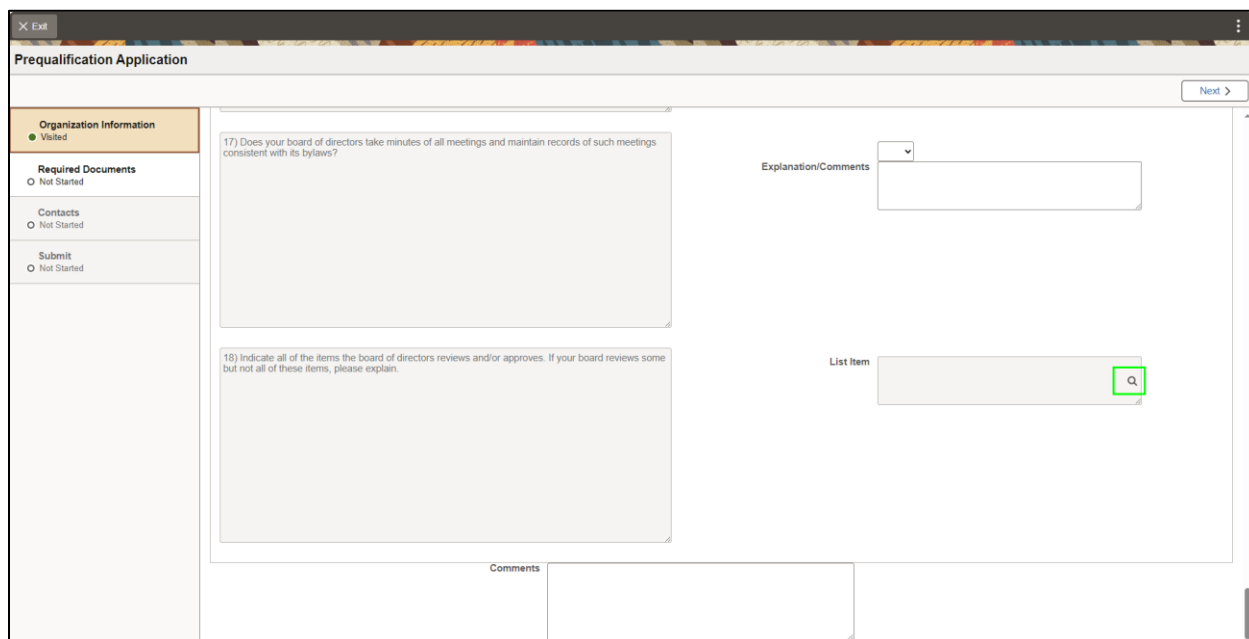
Step	Action
12.	<p>Complete the Questions by clicking the applicable drop-down list and selecting either Yes or No.</p> <p>Note: Some questions may ask for additional explanation depending on your answer. If so, add your explanation in the Explanation/Comments field as appropriate.</p>

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

SFS Handbook: Grantee Processing in SFS



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



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

SFS Handbook: Grantee Processing in SFS

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

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

✕ Exit
⋮

Prequalification Application

Organization Information
● Visited

Required Documents
○ Not Started

Contacts
○ Not Started

Submit
○ Not Started

17) Does your board of directors take minutes of all meetings and maintain records of such meetings consistent with its bylaws?

Yes


Explanation/Comments

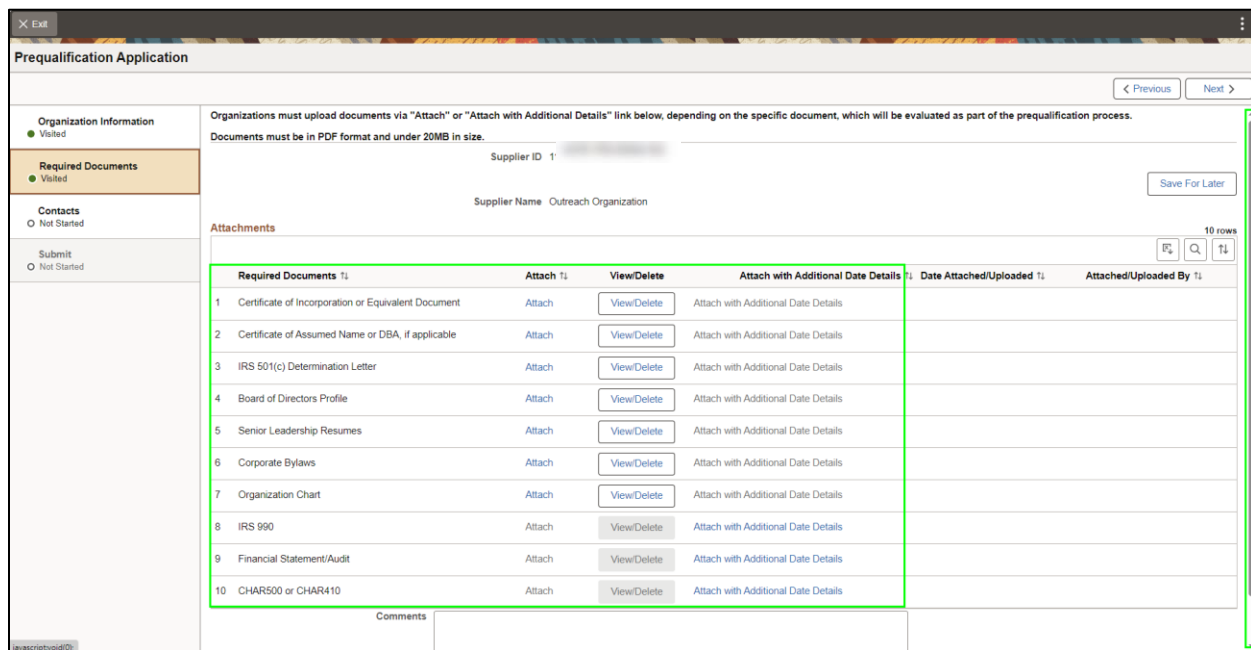
18) Indicate all of the items the board of directors reviews and/or approves. If your board reviews some but not all of these items, please explain.

List Item: Annual Operating Budget, Policies and Procedures, Executive Performance and Compensation, Fundraising Plan, Internal Controls, Fiscal Controls, Annual Audit, Form 990, Program Operations and Performance

Comments

SFS Handbook: Grantee Processing in SFS

Step	Action
19.	Enter any additional comments that you want the agency to see, in the Comments field located at the bottom of the page. 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.
20.	Click the Next button. 

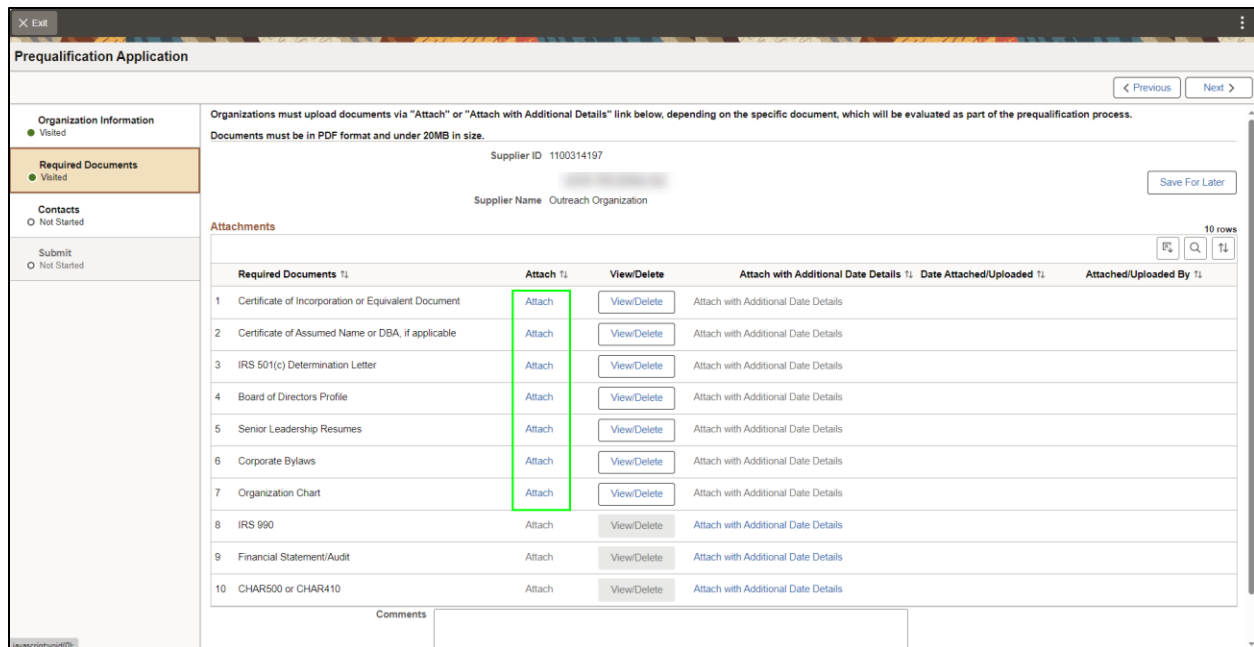


The screenshot shows the 'Prequalification Application' interface. On the left, there is a navigation menu with 'Organization Information' (Visited), 'Required Documents' (Visited), 'Contacts' (Not Started), and 'Submit' (Not Started). The main content area displays 'Organizations must upload documents 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.' Below this, there are fields for 'Supplier ID' and 'Supplier Name: Outreach Organization'. A 'Save For Later' button is visible. The 'Attachments' section contains a table with 10 rows, each representing a required document. The table has columns for 'Required Documents', 'Attach', 'View/Delete', 'Attach with Additional Date Details', 'Date Attached/Uploaded', and 'Attached/Uploaded By'. The table is highlighted with a green border. At the bottom, there is a 'Comments' field.

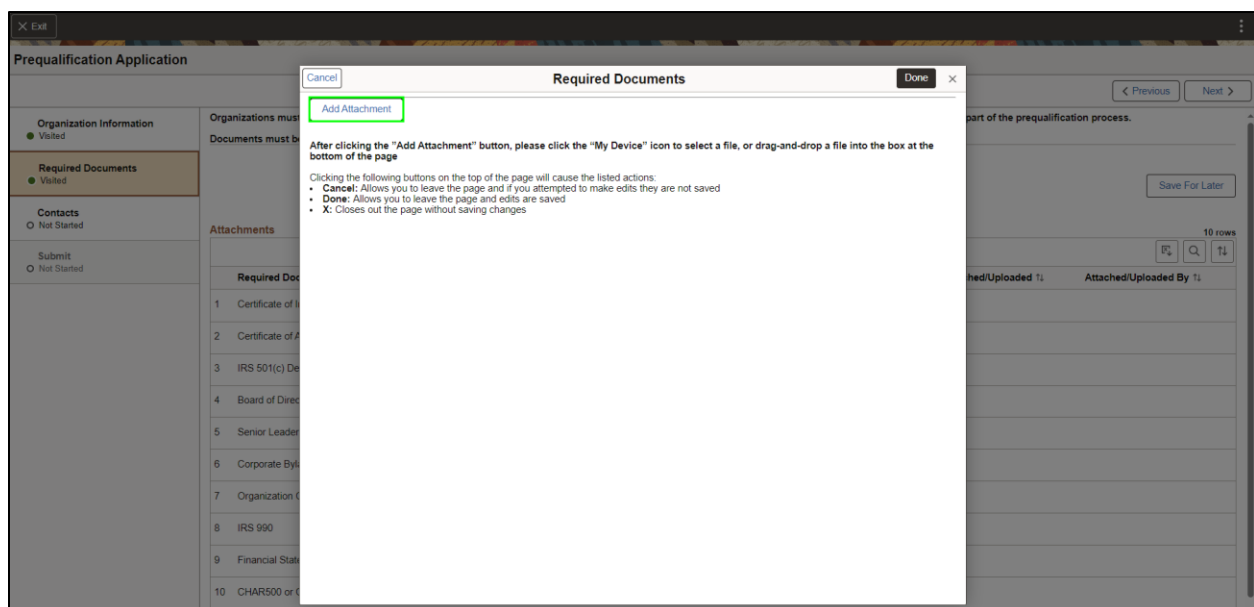
Required Documents	Attach	View/Delete	Attach with Additional Date Details	Date Attached/Uploaded	Attached/Uploaded By
1 Certificate of Incorporation or Equivalent Document	Attach	View/Delete	Attach with Additional Date Details		
2 Certificate of Assumed Name or DBA, if applicable	Attach	View/Delete	Attach 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		

Step	Action
21.	The Required Documents page is where you will upload the required documents for the agency to review.
22.	On the Required Documents page: <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

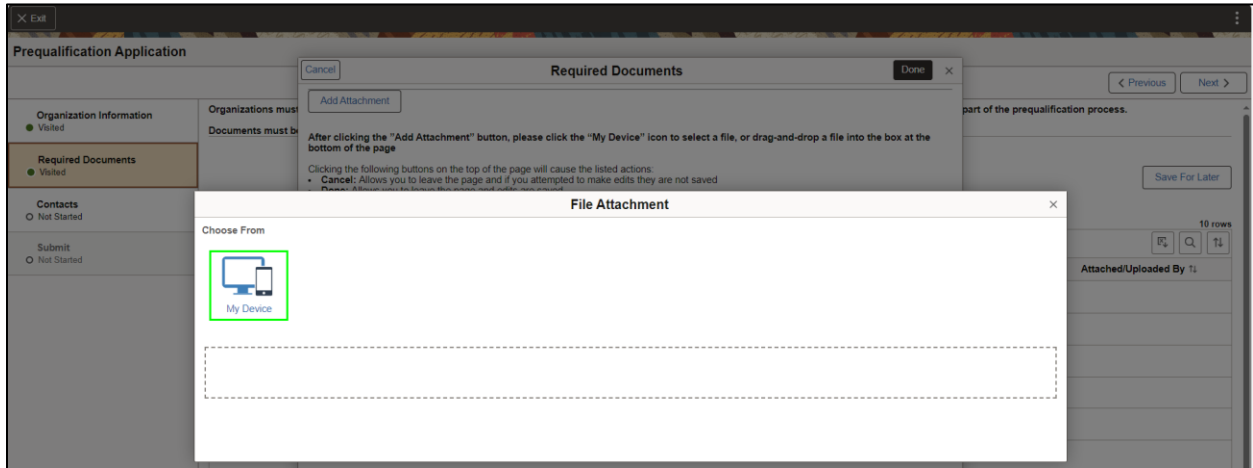


Step	Action
23.	<p>To add an attachment, click the Attach link.</p> <p>Note: If you have previously prequalified in SFS and are renewing your prequalification, all Required Documents which have an active Attach link (documents 1-7) will carry over from your previous prequalification. After selecting the Attach link, click on the file name to review each document from the previous version. If no changes are needed, you can skip to Step 31 in this procedure. If changes are needed to any documents, you can click the delete (-) button to remove the document and upload an updated version by following Step 24 onward.</p>

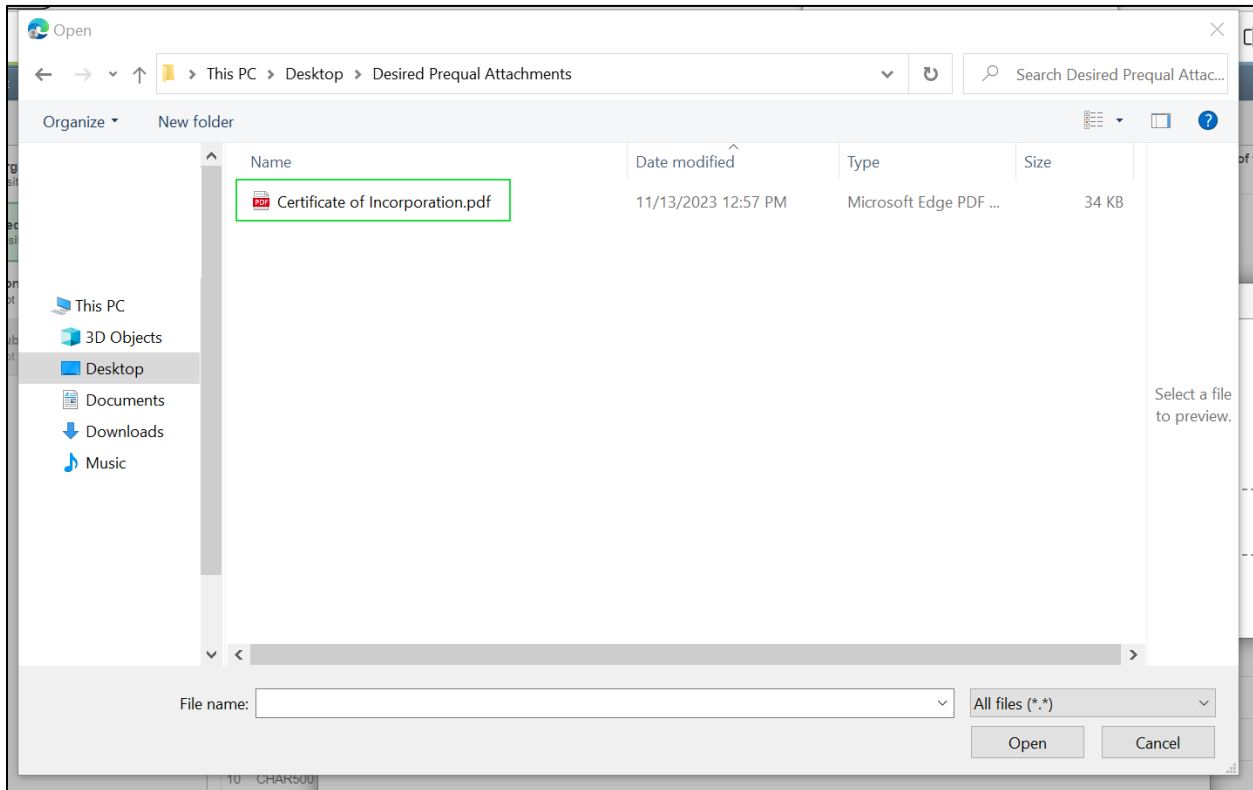


SFS Handbook: Grantee Processing in SFS

Step	Action
24.	Click the Add Attachment button.

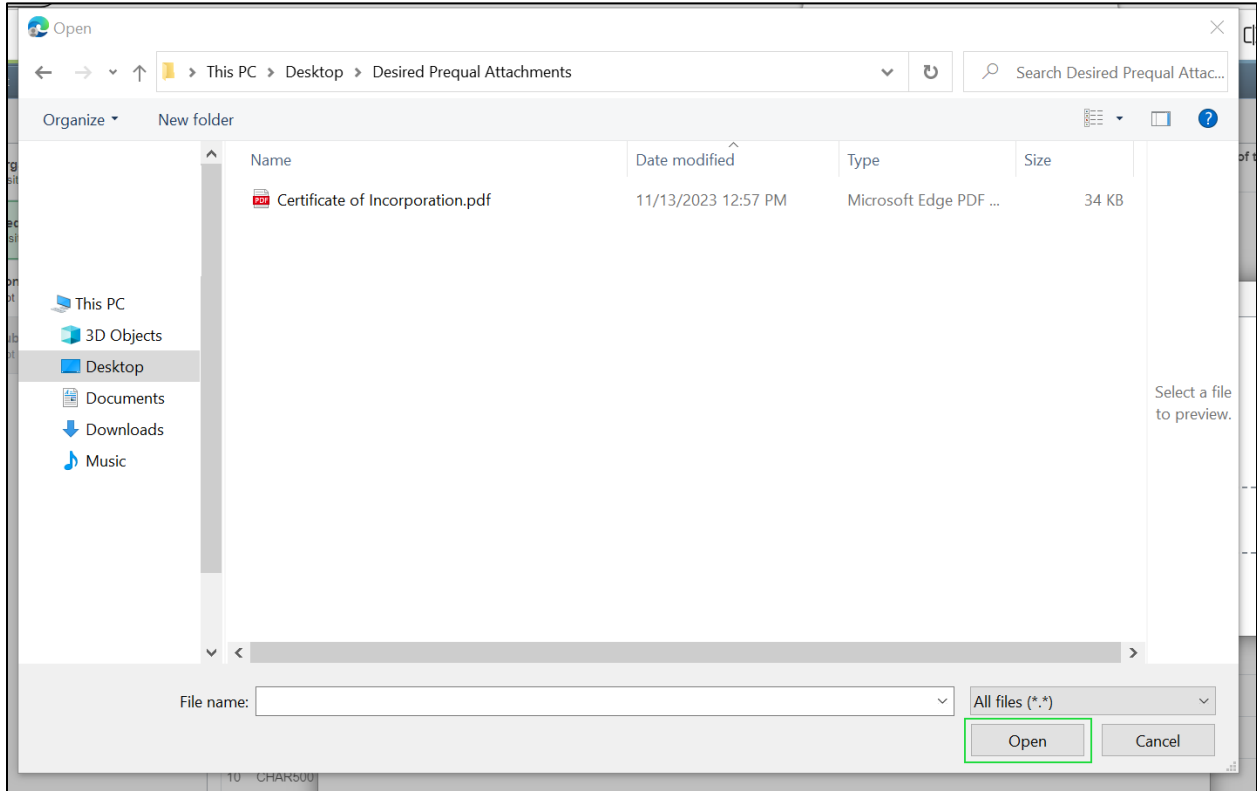


Step	Action
25.	Click the My Device button.

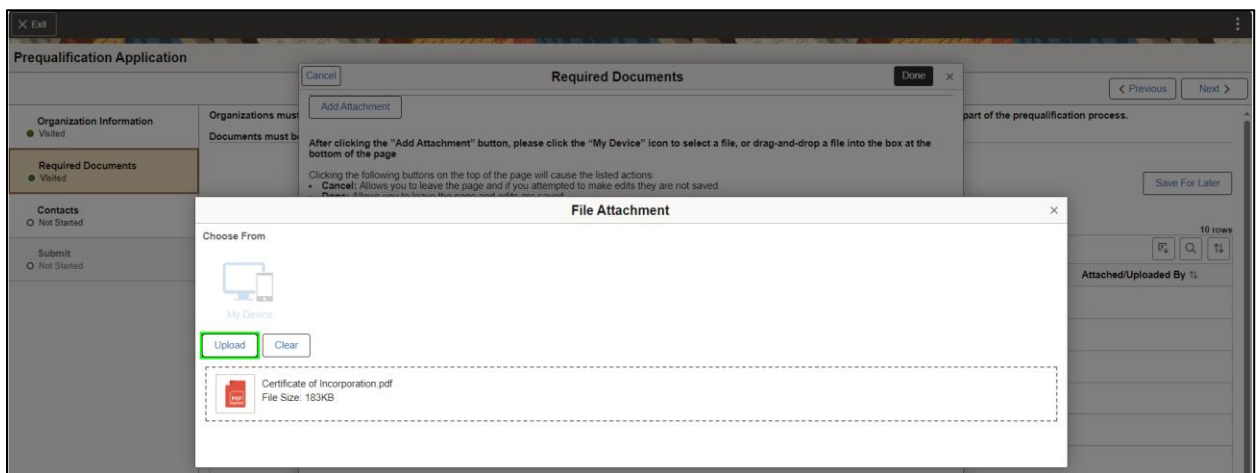
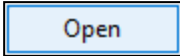


SFS Handbook: Grantee Processing in SFS

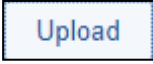
Step	Action
26.	Navigate to the directory location and select the applicable document for attachment.

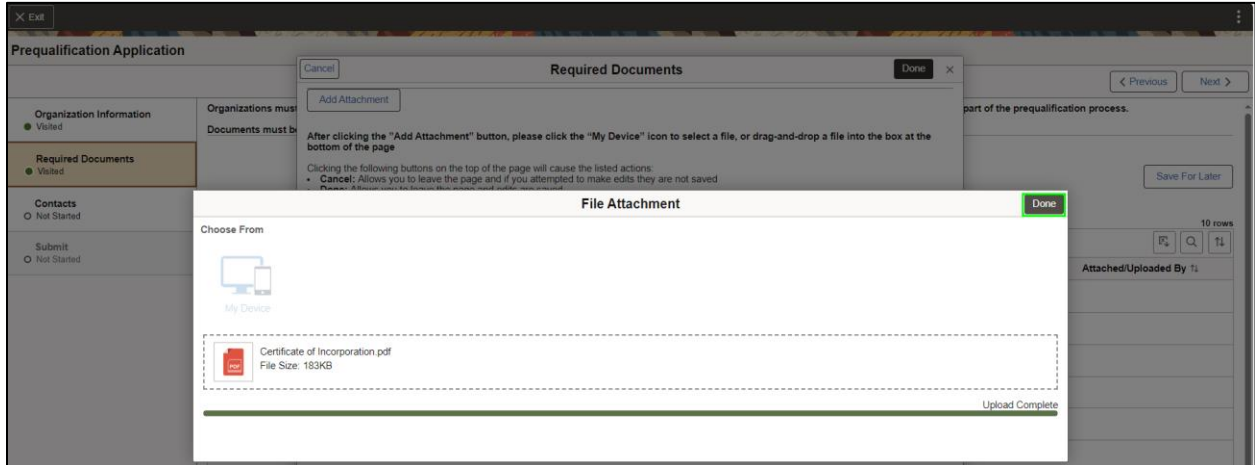



Step	Action
27.	Click the Open button.

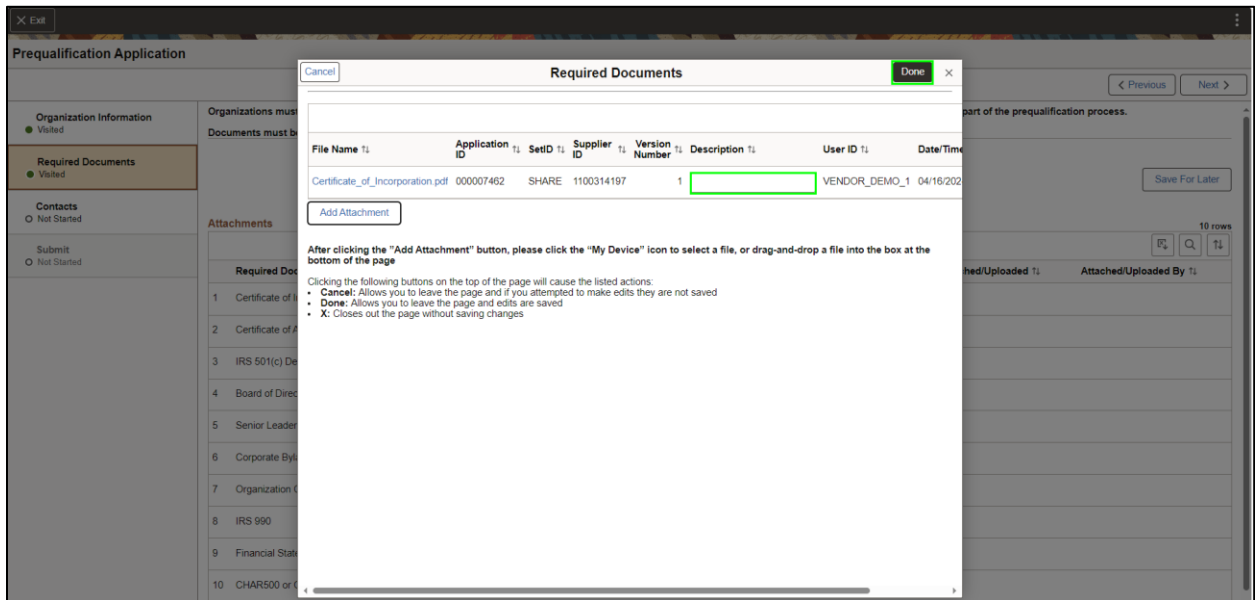


SFS Handbook: Grantee Processing in SFS

Step	Action
28.	Click the Upload button. 



Step	Action
29.	Click the Done button. 



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

Step	Action
31.	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: 1100314197

Supplier Name: Outreach Organization

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	04/16/2024 1:51:08PM	
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
32.	Follow the same process to add attachments for any additional rows, using 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: 1100314197

Supplier Name: Outreach Organization

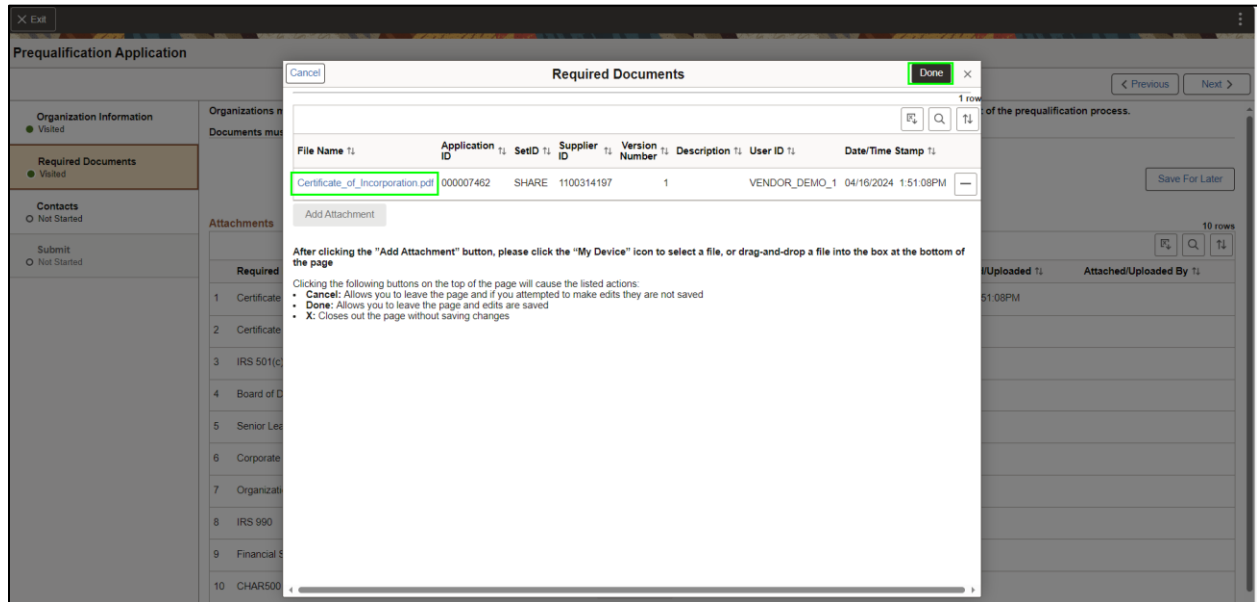
Attachments


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	04/16/2024 1:51:08PM	
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
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.



Step	Action
34.	To open the attachment, click the File Name link. In this example, we will not open the linked attachment.
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 1100314197

Supplier Name Outreach Organization

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	04/16/2024 1:51:08PM	VENDOR_DEMO_1
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
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 1100314197

Supplier Name Outreach Organization

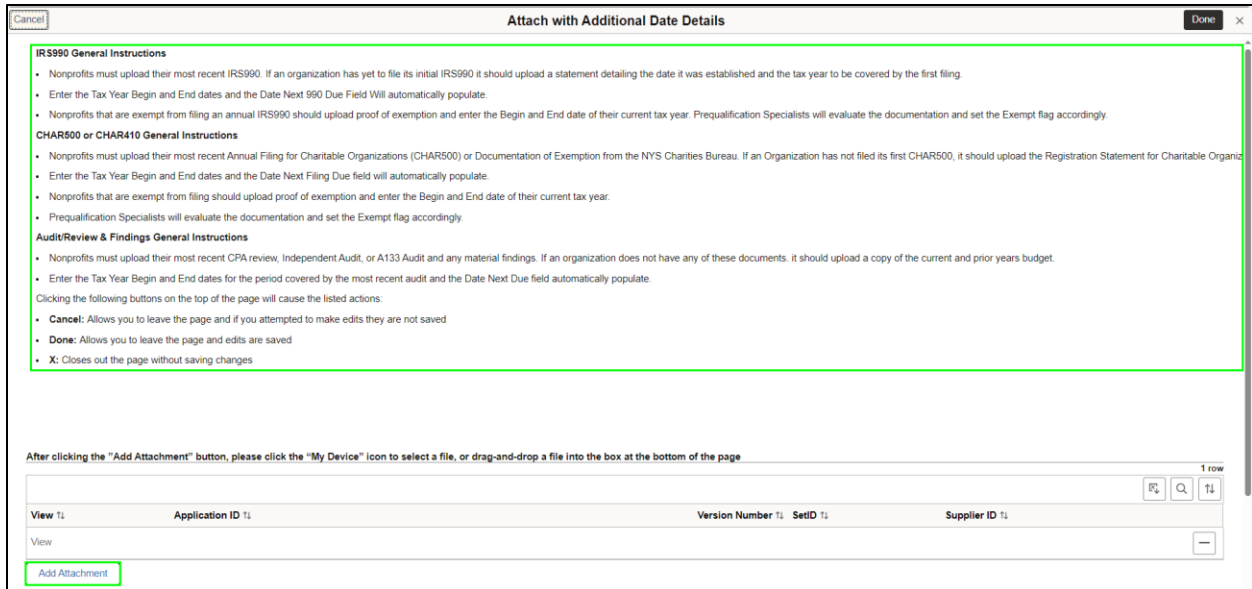
Attachments

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	04/16/2024 1:51:08PM	VENDOR_DEMO_1
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		

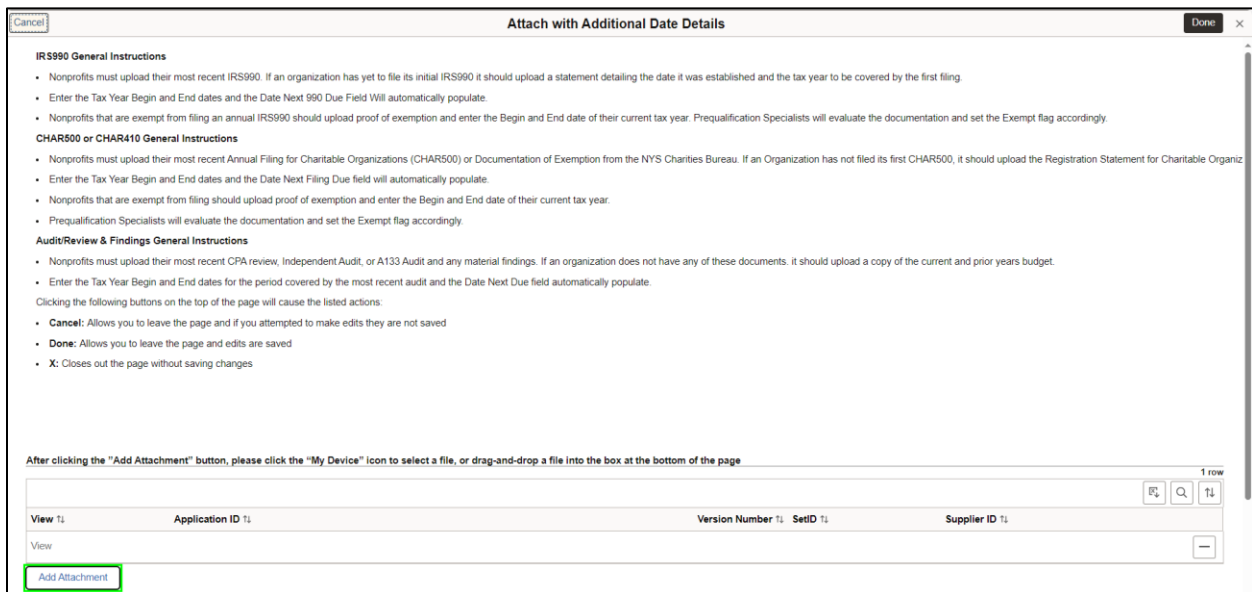
Comments

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

SFS Handbook: Grantee Processing in SFS

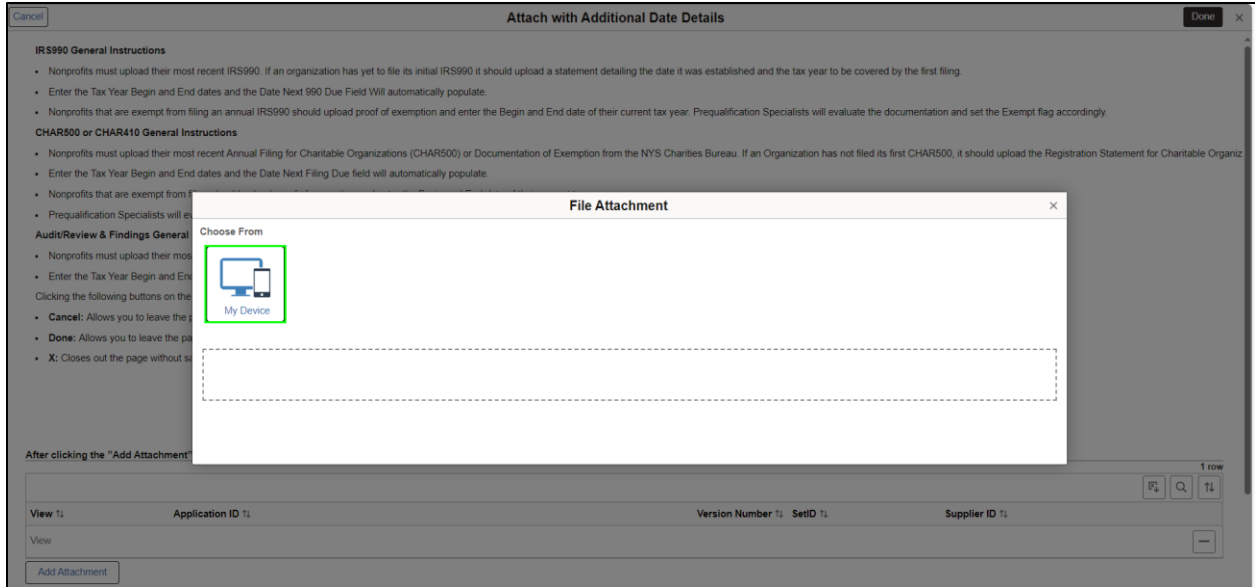


Step	Action
38.	Review the instructions for Upload as they apply to your Organization Type and then use the Add Attachment button to add the relevant documentation. Note: All attachments must be in PDF format. Uploading any other document types will result in automatic deletion by the system.

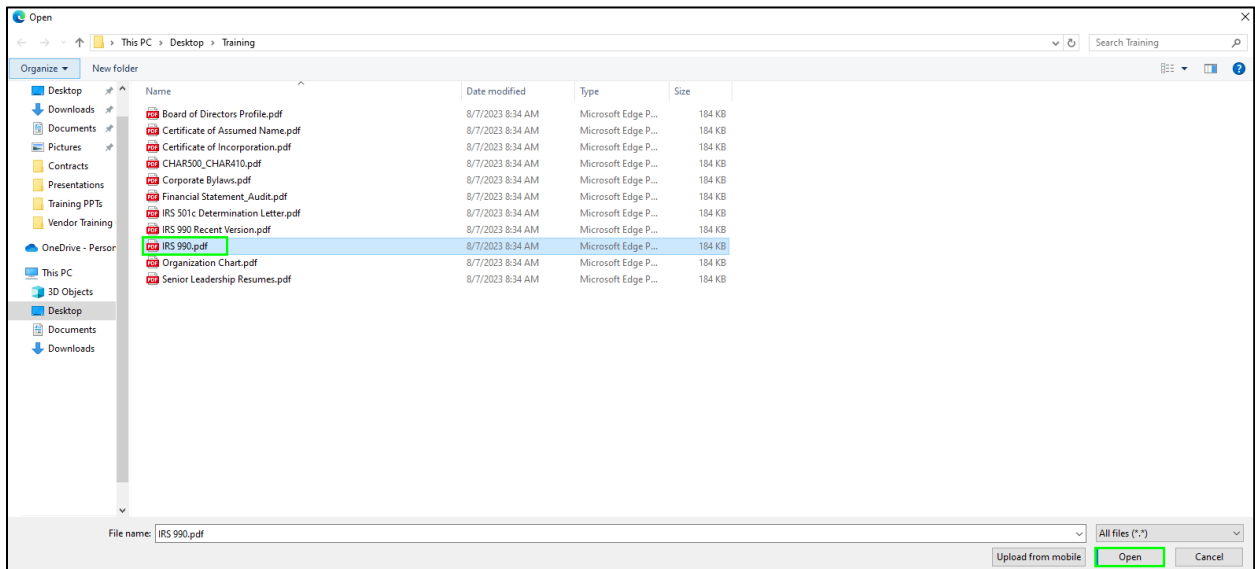


Step	Action
39.	Click the Add Attachment button.

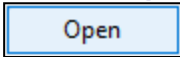
SFS Handbook: Grantee Processing in SFS



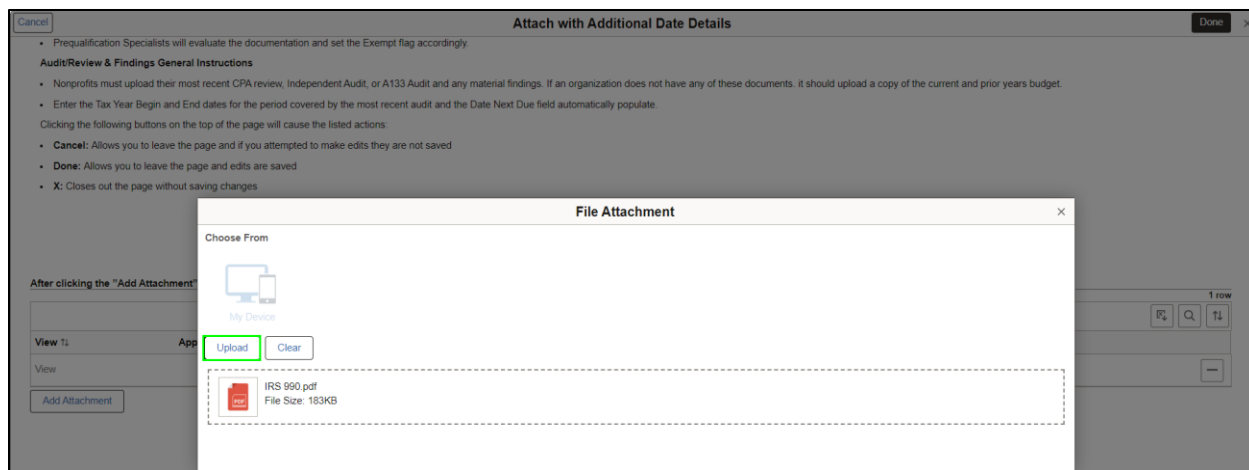
Step	Action
40.	Click the My Device button.



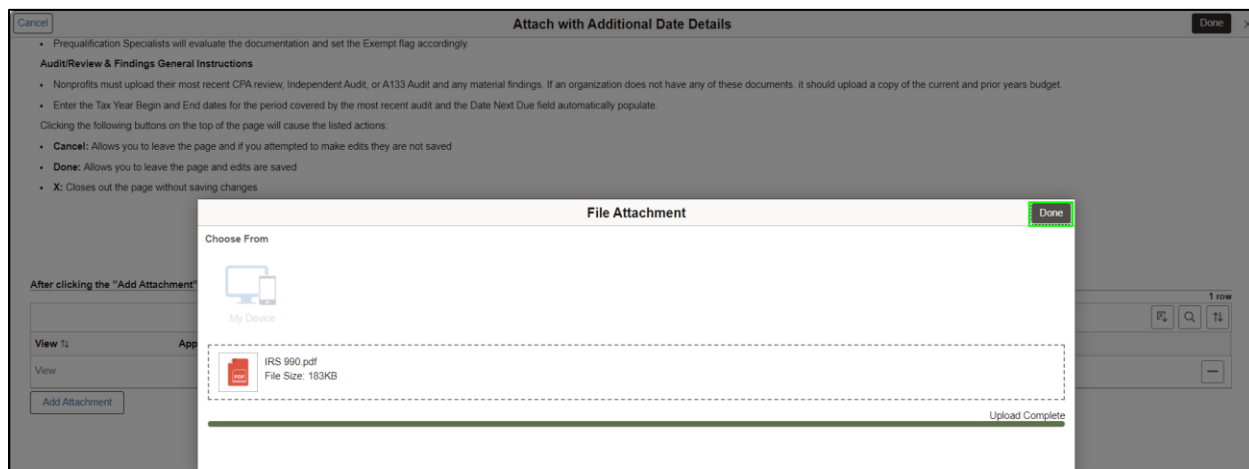
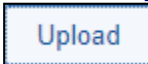
Step	Action
41.	Navigate to the directory location and select the applicable document for attachment.
42.	Click the Open button.



SFS Handbook: Grantee Processing in SFS



Step	Action
43.	Click the Upload button.



Step	Action
44.	Click the Done button.



SFS Handbook: Grantee Processing in SFS

Cancel
Attach with Additional Date Details
Done

• 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

IRS_990.pdf	Application ID	Version Number	SetID	Supplier ID
IRS_990.pdf	000007462	1	SHARE	1100314197

1 row

Add Attachment

Date Next Due

Tax Year Begin Date

State Adjusted Due Date

Tax Year End Date

State Adjusted Due Date Reason

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.
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.
47.	Click the Done button.

X Exit
Prequalification Application
< Previous
Next >

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 1100314197

Supplier Name Outreach Organization


Save For Later

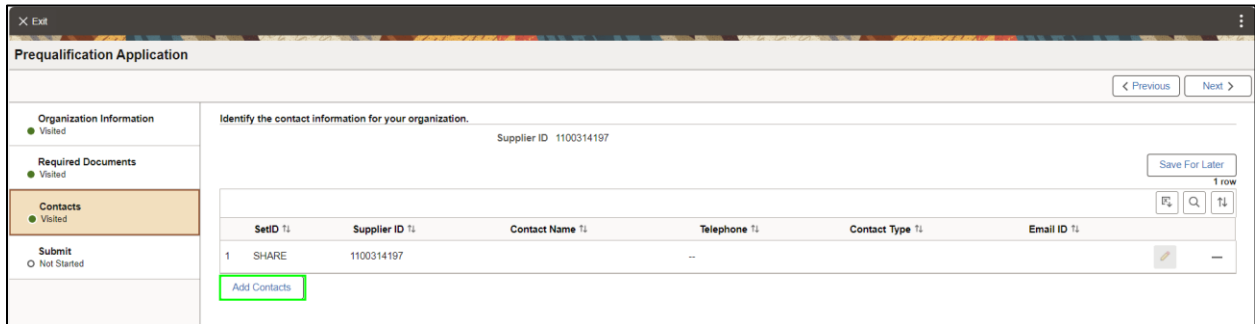
Attachments

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	04/16/2024 1:51:08PM	VENDOR_DEMO_1
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	04/16/2024 4:13:27PM	
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
48.	Follow the same process to add attachments for any additional rows with the Attach with Additional Date Details link.
49.	Click the Next button. 



Prequalification Application


Identify the contact information for your organization.

Supplier ID 1100314197

Save For Later

SetID	Supplier ID	Contact Name	Telephone	Contact Type	Email ID
1	SHARE	1100314197	--		

Add Contacts

Step	Action
50.	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>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>

SFS Handbook: Grantee Processing in SFS

Cancel
Add New Contact
Done ×

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.	Enter the applicable value in the Description field. 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 .

Cancel
Add New Contact
Done ×

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

SFS Handbook: Grantee Processing in SFS

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.

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

SFS Handbook: Grantee Processing in SFS

Cancel
Add New Contact
Done ✕

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
Next >

Organization Information ● Visited

Required Documents ● Visited

Contacts ● Visited

Submit ○ Not Started


Identify the contact information for your organization.

Supplier ID 1100314197

Save For Later

SetID	Supplier ID	Contact Name	Telephone	Contact Type	Email ID
1	SHARE	1100314197	Jane Doe	518-245-9879	tst@tst.com

Add Contacts
1 row

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

SFS Handbook: Grantee Processing in SFS

Prequalification Application

Organization Information: Visited

Required Documents: Visited

Contacts: Visited

Submit: Visited

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: tst@tst.com ;

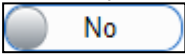
Attestation

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

No

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>

Prequalification Application

Organization Information: Visited

Required Documents: Visited

Contacts: Visited

Submit: Visited

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: tst@tst.com ;

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.

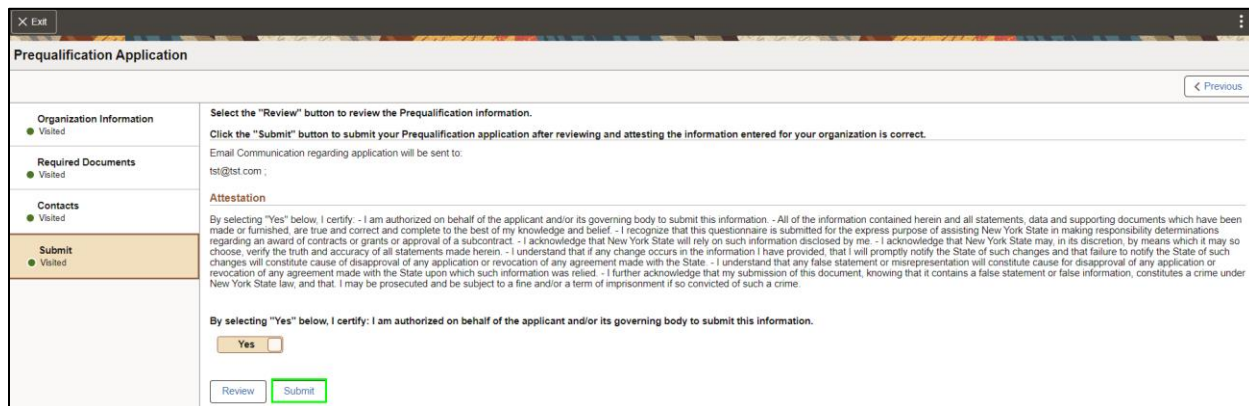
By selecting "Yes" below, I certify: I am authorized on behalf of the applicant and/or its governing body to submit this information.

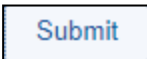
Yes

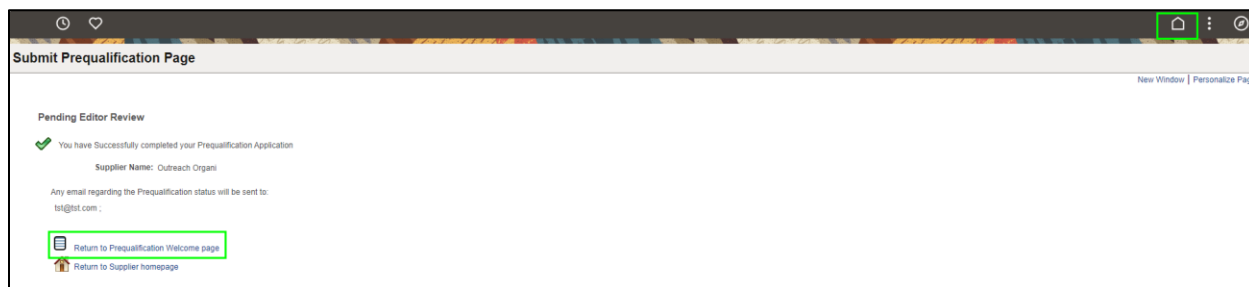
No

Step	Action
61.	<p>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.</p> <p>Note: This is an optional step.</p>
62.	<p>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).</p>

SFS Handbook: Grantee Processing in SFS



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



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:

SFS Handbook: Grantee Processing in SFS

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

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

SFS role(s) required to perform this task:

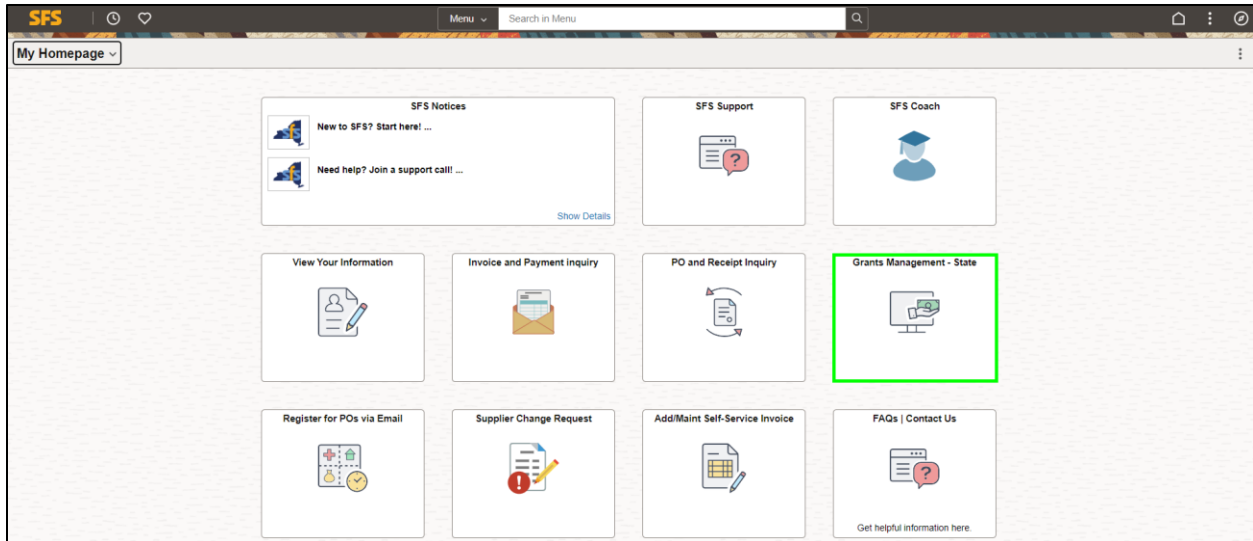
- Bid Response Initiator (NY_GM_VENDOR_EVENT_INITIATE)
 - **Note:** This role allows you to initiate a bid response to a bid event but not submit the bid response to the agency.
- Bid Response Submitter (NY_GM_VENDOR_EVENT_SUBMIT)
 - **Note:** This role allows you to both initiate a bid response and submit a bid response to the agency.


Procedure

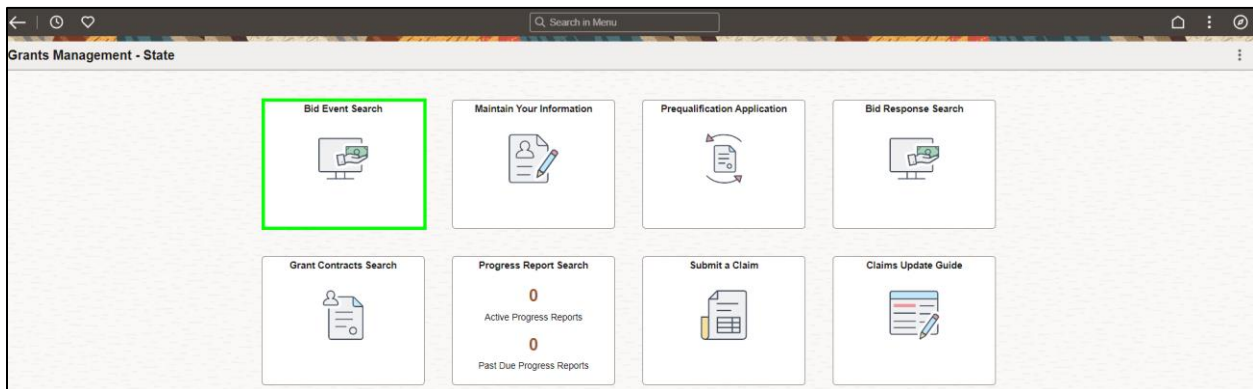
Scenario: You will log in to the SFS Vendor Portal, search for an available bid event (grant opportunity) and respond to the agency questions. You will also enter your budget, work plan information, and your bid price before submitting to the agency for review.

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

View Events and Place Bids

Welcome, Outreach Organization
User: John Doe

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	Du
EVT0000001	OMH01	Outpatient Treatment Programs for Adolescents	Available	Not-For-Profit	04/17/24 2:01PM	04/17/24 2:01PM	04 5.0

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.	Note: A list of Event IDs will populate based on the search criteria entered. Click an Event ID link to initiate a bid response.

Event Details

Welcome, Outreach Organization
User: John Doe

[Information On Inquiry Options](#)

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

Event Name: Outpatient Treatment Programs for Adolescents
Event ID: OMH01-EVT0000001
Event Format/Type: Sell Event RFX
Event Round: 1
Event Version: 1
Event Start Date: 04/17/2024 2:01PM EDT
Event End Date: 04/18/2024 05:01 PM EDT

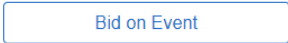
Event Description:
The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of stay for individuals less than 18 years old.
New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18. Approximately \$1,000,000 each is available for three programs.

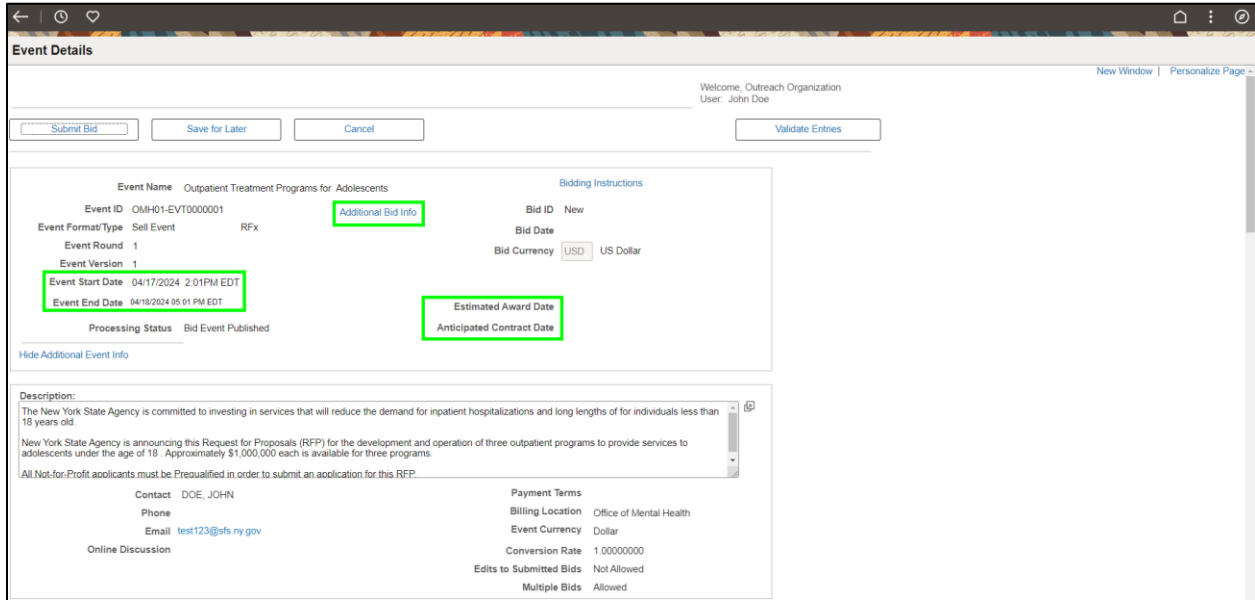
Contact: DOE, JOHN
Phone:
Email: test123@sfs.ny.gov

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

Online Discussion
Live Chat Help

SFS Handbook: Grantee Processing in SFS

Step	Action
6.	Click the Bid on Event button. 



Event Details

Welcome, Outreach Organization
User: John Doe

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

Event Name: Outpatient Treatment Programs for Adolescents

Event ID: OMIH01-EVT0000001

Event Format/Type: Sell Event

Event Round: 1

Event Version: 1

Event Start Date: 04/17/2024 2:01PM EDT

Event End Date: 04/19/2024 05:01 PM EDT

Processing Status: Bid Event Published

Additional Bid Info (highlighted)

Bidding Instructions:

Bid ID: New

Bid Date:

Bid Currency: USD US Dollar

Estimated Award Date (highlighted)

Anticipated Contract Date (highlighted)

Description:

The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of for individuals less than 18 years old.

New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18. Approximately \$1,000,000 each is available for three programs.

All Not-for-Profit applicants must be Prequalified in order to submit an application for this RFP.

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

Payment Terms:

Billing Location: Office of Mental Health

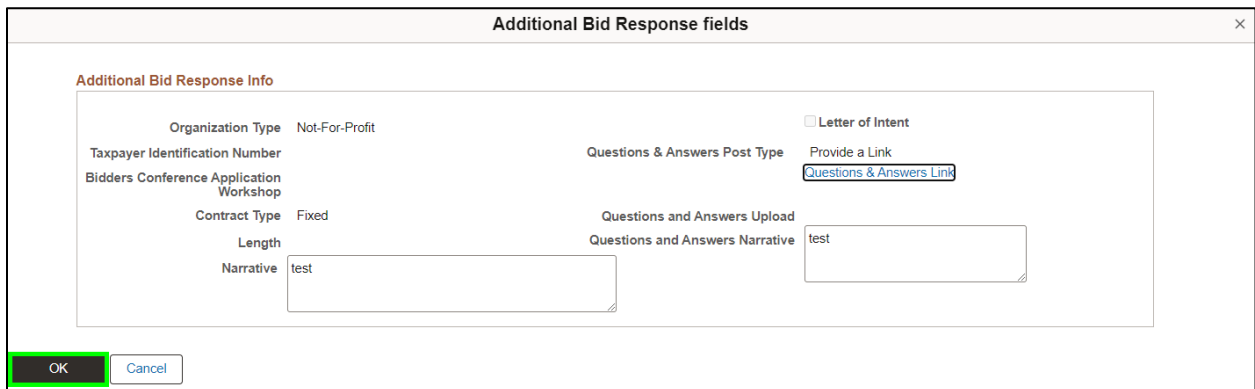
Event Currency: Dollar

Conversion Rate: 1.00000000

Edits to Submitted Bids: Not Allowed

Multiple Bids: Allowed

Step	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

Taxpayer Identification Number:

Bidders Conference Application: Workshop

Contract Type: Fixed

Length:

Narrative: test

Letter of Intent:

Questions & Answers Post Type: Provide a Link
[Questions & Answers Link](#)

Questions and Answers Upload:

Questions and Answers Narrative: test

Buttons: **OK** [Cancel](#)

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

🔍 1-1 of 1 > > | View All

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	Your Total Bid Price	
1	Period Details -1		Line 1	EA	<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.

[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.

Event Comments and Attachments ✕

Business Unit: OMH01 Event ID: EVT0000001 Event Round: 1 Event Version: 1

Attachments

[View Event Attachments](#) 🗨

🔍 1-1 of 1 > > |

Attached File	Attachment Description	Event RFX Doc	Upload	View
		<input type="checkbox"/>	<input type="button" value="Upload"/>	<input type="button" value="View"/>

Add New Attachments 🗨

🔍 1-2 of 2 > > |

Attached File	Attachment Description	Upload	View		
Instructions_document.pdf	<input type="text"/>	<input type="button" value="Upload"/>	<input type="button" value="View"/>	Add New Attachments	Delete
Reporting_Template.pdf	<input type="text"/>	<input type="button" value="Upload"/>	<input type="button" value="View"/>	Add New Attachments	Delete

Comments

[Add New Comments](#) 🗨

SFS Handbook: Grantee Processing in SFS

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

Event Details

Event Format/Type: Sell Event RFX
 Event Round: 1
 Event Version: 1
 Event Start Date: 04/17/2024 2:01PM EDT
 Event End Date: 04/19/2024 05:01 PM EDT
 Processing Status: Bid Event Published

Bid Date: []
 Bid Currency: USD US Dollar

Estimated Award Date: []
 Anticipated Contract Date: []

[Hide Additional Event Info](#)

Description:
 The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of for individuals less than 18 years old.
 New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18. Approximately \$1,000,000 each is available for three programs.
 All Not-for-Profit applicants must be Prequalified in order to submit an application for this RFP.

Contact: DOE, JOHN
 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: 5
 Required Questions: 5
 Questions Responded To: 0

DUNS Number: []
 Organization Website: []
 User Name: Doe, John

[Site/Project Address](#)
Bidder Contact Information
 Name: []
 Telephone: []
 Email: []

[Hide Event Questions](#)

Step	Action
12.	Use the scrollbar to navigate to the Step 1: Answer General Event Questions section.
13.	If applicable, enter your Organization Website in the Organization Website field. This field is optional and not required.
14.	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 organization who can be contacted with questions about the bid response.</p>
15.	Click the Site/Project Address link.

SFS Handbook: Grantee Processing in SFS

×
Bid Response address fields

Site/Project Address

|
◀
<
1 of 1
>
▶
| View All

+
-

Address Line

1

Address Line

2

City

Postal Code

State

OK

Cancel

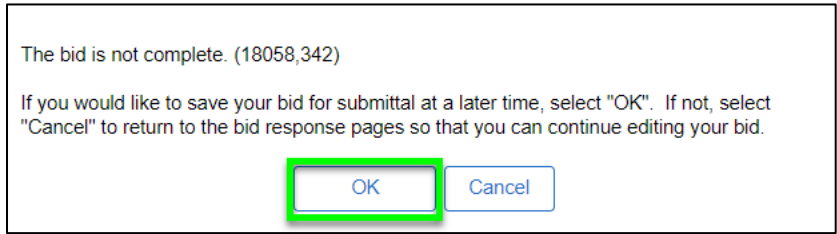
Step	Action
16.	<p>Enter Address Details, including the following information:</p> <ul style="list-style-type: none"> Address Line 1 Address Line 2 (if applicable) City Postal Code State <p>Note: The Site/Project Address is where the grant will be used, or funds will be spent.</p>
17.	<p>When you have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

SFS Handbook: Grantee Processing in SFS

Step	Action
18.	<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:</p> <ul style="list-style-type: none"> • Text responses are limited to 2,000 characters. Comments/Attachments can be utilized to add additional text if the 2,000-character limit is met. • The ability to add a Comment/Attachment will vary based on the question.

SFS Handbook: Grantee Processing in SFS

Step	Action
19.	Click the Save for Later button.



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

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	Your Total Bid Price
1	Period Details -1		Line 1	EA	<input type="text"/>	

Step	Action
21.	Scroll to the bottom of the page. Under the Lines section, click the Period Details - 1 link under the Period column to access budget and work plan information.

SFS Handbook: Grantee Processing in SFS

Step	Action
22.	Click the Budget properties link.

Budget Properties Header

Event ID	EVT0000001	Max Award Amount	3000000.000
Bid Event Period	1	Period From Date	09/01/2024
Bidder/Vendor ID	1100314197	Period To Date	08/31/2025
		Budget Type	EXPENDITURE

Budget Properties

Apply Match Not Allowed ?

Calculate Match

Include Match Worksheet

Budget Category Properties

	Budget Category	Available in Grant	Use Match	Match Percentage	Use Other	Overage on Claims	Overage Percentage
1	SALARY	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	
2	FRINGE	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>	
3	CONTRACTUAL	<input checked="" 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
23.	Review the Budget Header Information .
24.	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

10	OTHER	<input checked="" 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	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
25.	<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 Contractual budget category.</p>
26.	<p>Under the Period Budget Summary section, click on Category Details icon for the Contractual budget category.</p> <div style="border: 1px solid black; width: 40px; height: 40px; margin: 5px 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

Category Details

Budget Type EXPENDITURE
Match % Required

Budget Category CONTRACTUAL

Category Details

☰
🔍
|< < 1-1 of 1 > >|
View All

	Type/Description	Grant Funds	Match Funds	Match %	Other funds
1	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" 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
27.	Enter the applicable value into the Grant Funds field. In this example, we will enter 10,000 into the Grant Funds field.
28.	Enter the applicable value into the Match Funds field. In this example, we will leave this field blank.
29.	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.
30.	Enter the applicable value into the Type/Description field. In this example, we will leave this field blank.

SFS Handbook: Grantee Processing in SFS

Step	Action
31.	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 contractual budget category.
32.	Click the OK button.

Budget Properties Header

Narrative

Period Budget Summary

	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	10000.00	0.00	0	0	0.00	10000.00	
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	10000.00	Match % Calc	0.00
Match Funds	0.00	Other Funds	0.00
Total	10000.00		

Step	Action
33.	Click the Save button.
34.	Click the Back button.

Create Bids

Business Unit: OIH01 Budget Type: EXPENDITURE
 Event ID: EVT0000001 Funded Amount: 3000000.00
 Bidder Setid: SHARE Period: 1 Bidder ID: 1100314197

Bid Event Periods

Period: 1
 Period From: 09/01/2024 Period To: 08/31/2025

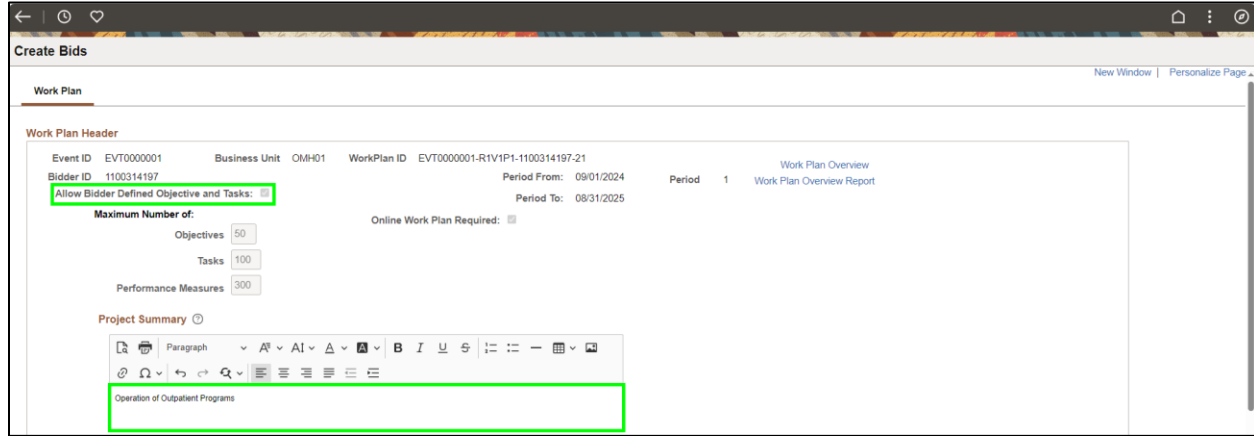
Budget Required Budget properties
 Work Plan Required Work Plan Properties

Bid Event Line# 1

<Return to Bid Response

SFS Handbook: Grantee Processing in SFS

Step	Action
35.	Click the Work Plan Properties link.



Step	Action
36.	Review the Work Plan Header information and verify the Allow Bidder Defined Objectives and Tasks is selected.
37.	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.
38.	Enter the applicable value into the Project Summary field if not already entered by the agency. In this example, we will enter Operation of Outpatient Programs in the Project Summary field.

SFS Handbook: Grantee Processing in SFS

Objectives >> Tasks >> Performance Measures

Objective Task Perf. Measure Display Type: All

1-9 of 9 View All

Basic Info More Details

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
<input checked="" type="checkbox"/>	Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.1	Hire staff to operate program	Hire staff to operate program	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.2	Obtain Office Space	Obtain Office Space	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.3.1	List referring agencies	List referring agencies	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.3.2	Describe referral process	Describe referral process	<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"/>

Objective Task Perf. Measure Display Type: All

Back Save Refresh

Step	Action
39.	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.
40.	Click the + Objective button.
41.	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.
42.	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.

SFS Handbook: Grantee Processing in SFS

The screenshot shows the SFS interface with a table of objectives and tasks. The 'Task' button is highlighted in green. In the table, row 9 (Objective) and row 10 (Task) are highlighted with green boxes. The task name 'Distribute Narcan kits to trained community members' and its description are also highlighted with green boxes.

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
<input type="checkbox"/>	Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.1	Hire staff to operate program	Hire staff to operate program	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.2	Obtain Office Space	Obtain Office Space	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.3.1	List referring agencies	List referring agencies	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.3.2	Describe referral process	Describe referral process	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<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"/>
<input type="checkbox"/>	Task	2.1	Distribute Narcan kits to trained community members	Distribute Narcan kits to trained community members	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Step	Action
43.	Select the Objective row where the task will be added.
44.	Click + Task button.
45.	Enter the applicable information on the Task row, in the Name field. On the Task row, in this example we will enter Distribute Narcan kits to trained community members in the Name field.
46.	Enter the applicable information on the Task row, in the Description field. On the Task row, in this example we will enter Distribute Narcan 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

1-11 of 11 View All

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
<input type="checkbox"/>	Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.1	Hire staff to operate program	Hire staff to operate program	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.2	Obtain Office Space	Obtain Office Space	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.3.1	List referring agencies	List referring agencies	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.3.2	Describe referral process	Describe referral process	<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 Narcan kits to trained	Distribute Narcan 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

Step	Action
47.	Select the Task row where the performance measure will be added.
48.	Click + Performance Measure button.
49.	Enter the applicable information on the Performance Measure row, in the Name field. On Performance Measure row, in this example we will enter Number of kits distributed in the Name field.
50.	Enter the applicable information on the Performance Measure row, in the Description field. On Performance Measure row, in this example we will enter Number of kits distributed in the Description field.

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
<input type="checkbox"/>	Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.1	Hire staff to operate program	Hire staff to operate program	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.2	Obtain Office Space	Obtain Office Space	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.3.1	List referring agencies	List referring agencies	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.3.2	Describe referral process	Describe referral process	<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 Narcan kits to trained	Distribute Narcan 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

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

Sort Order	Name	Description	Required	Allowed to Sort	Allow Performance Measure	Perf Measure Response Type	Numeric (Target/Goal)
1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
1.1	Hire staff to operate program	Hire staff to operate program	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Numeric	5
1.2	Obtain Office Space	Obtain Office Space	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
1.2.1	Upload a copy of your lease	Upload a copy of your lease	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Attachment	
1.3	Define referral strategy and procedure	Define referral strategy and procedure	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
1.3.1	List referring agencies	List referring agencies	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Text/Comment	
1.3.2	Describe referral process	Describe referral process	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Text/Comment	
2	Increase the number of opioid related	Increase the number of opioid related	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
2.1	Distribute Narcan kits to trained	Distribute Narcan kits to trained	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
2.1.1	Number of kits distributed.	Number of kits distributed.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Numeric	100

Display Type: All

Back Save Refresh

Step	Action
52.	<p>Note: Available Performance Measure options are:</p> <ul style="list-style-type: none"> Attachment Date Numeric Text/Comment Yes/No

SFS Handbook: Grantee Processing in SFS

Step	Action
	In this example, on the Performance Measure row, we will select the Performance Measure Response Type drop-down list and select the Numeric option.
53.	Enter the applicable value into the Numeric (Target/Goal) field. In this example, we will enter 100 in the Numeric (Target/Goal) field.
54.	Click the Save button.
55.	Click the Back button.

Step	Action
56.	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	Your Total Bid Price
1	Period Details -1		Line 1	EA	20000	

[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](#)

SFS Handbook: Grantee Processing in SFS

Step	Action
57.	<p>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.</p> <p>In this example, we will enter 10,000 in the Your Unit Bid Price field.</p>
58.	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
59.	In the resulting popup, click the Yes button to confirm you would like to submit the bid.
60.	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

SFS role(s) required to perform this task:

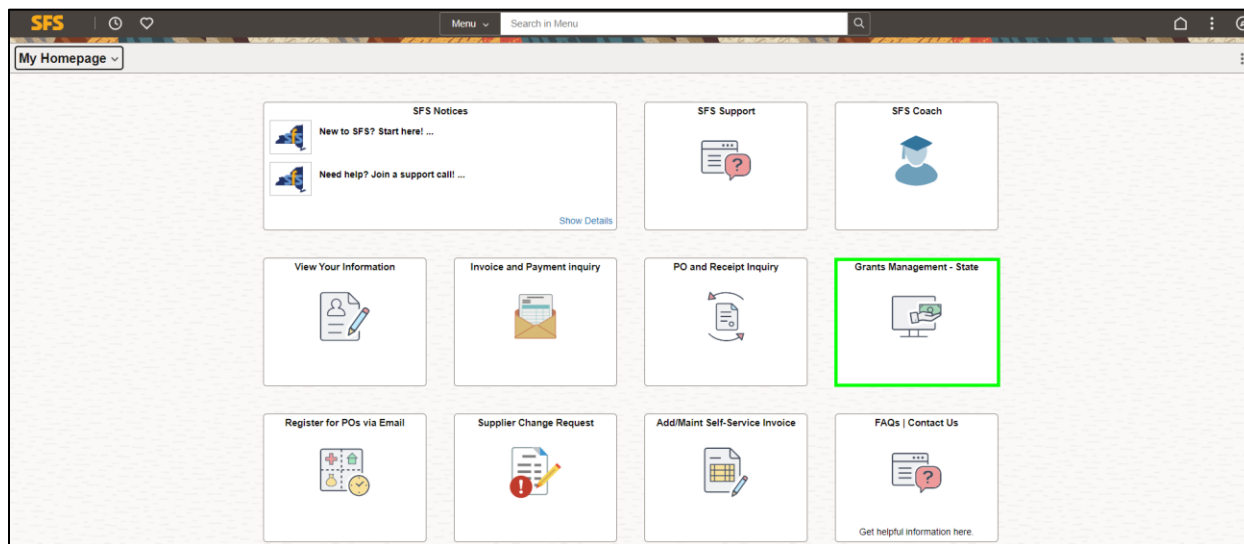
- Bid Response Initiator (NY_GM_VENDOR_EVENT_INITIATE)
 - **Note:** This role allows you to initiate a bid response to a bid event but not submit the bid response to the agency.
- Bid Response Submitter (NY_GM_VENDOR_EVENT_SUBMIT)
 - **Note:** This role allows you to both initiate a bid response and submit a bid response to the agency.


Procedure

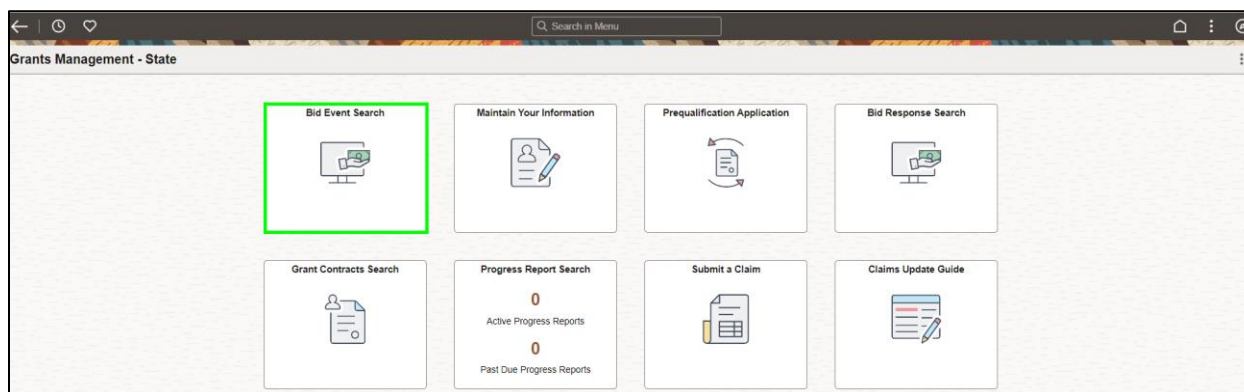
Scenario: You will log in to the SFS Vendor Portal, search for an available bid event (grant opportunity) and respond to the agency questions. You will also enter your budget, work plan information, and your bid price before submitting to the agency for review.

SFS Handbook: Grantee Processing in SFS

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.

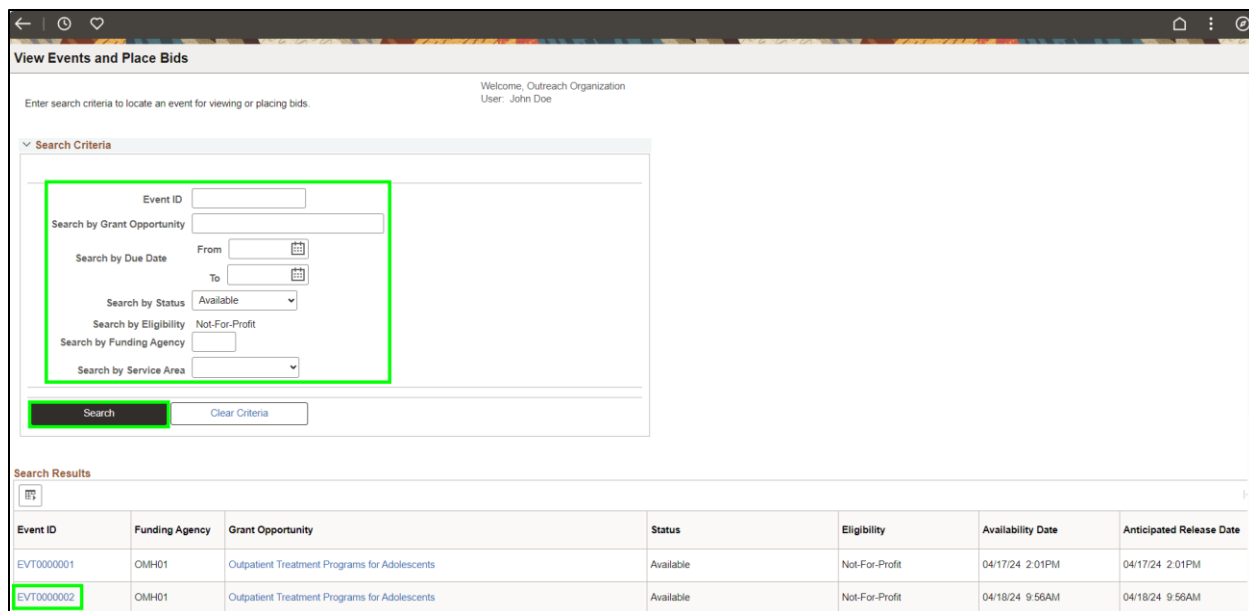


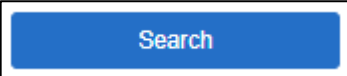
Step	Action
1.	<p>Preferred Navigation: Click the Grant Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > Manage Events and Place Bids > View Events and Place Bids</p>  <p>Note: You must log in to the SFS Vendor Portal to respond to a bid event.</p>



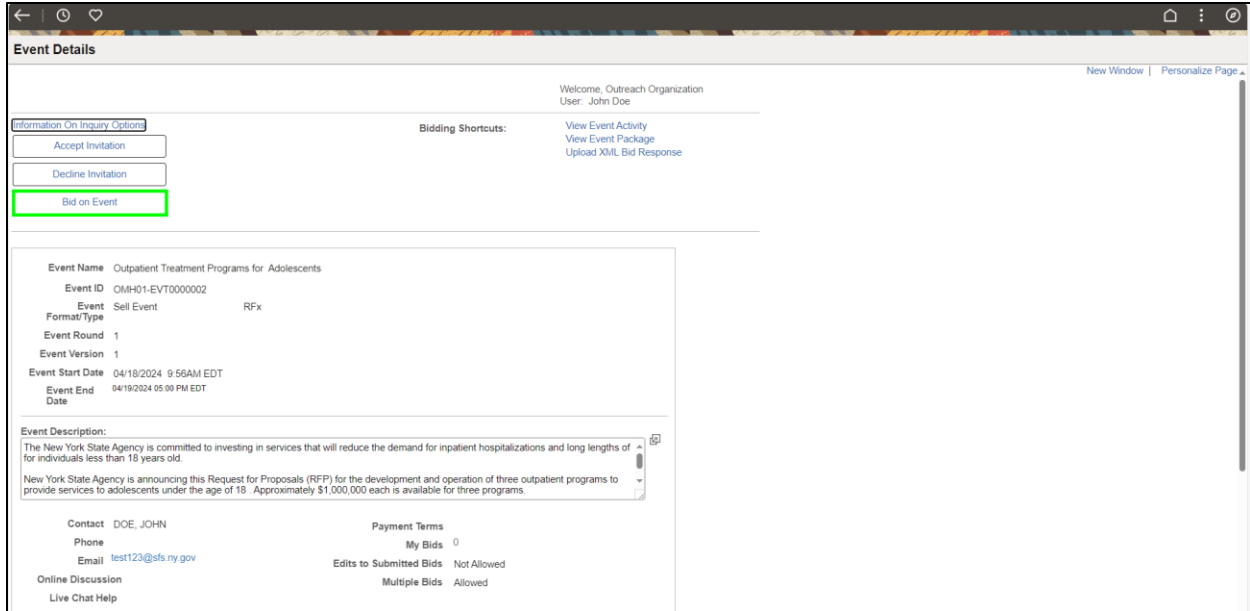
Step	Action
2.	Click the Bid Event Search tile.

SFS Handbook: Grantee Processing in SFS



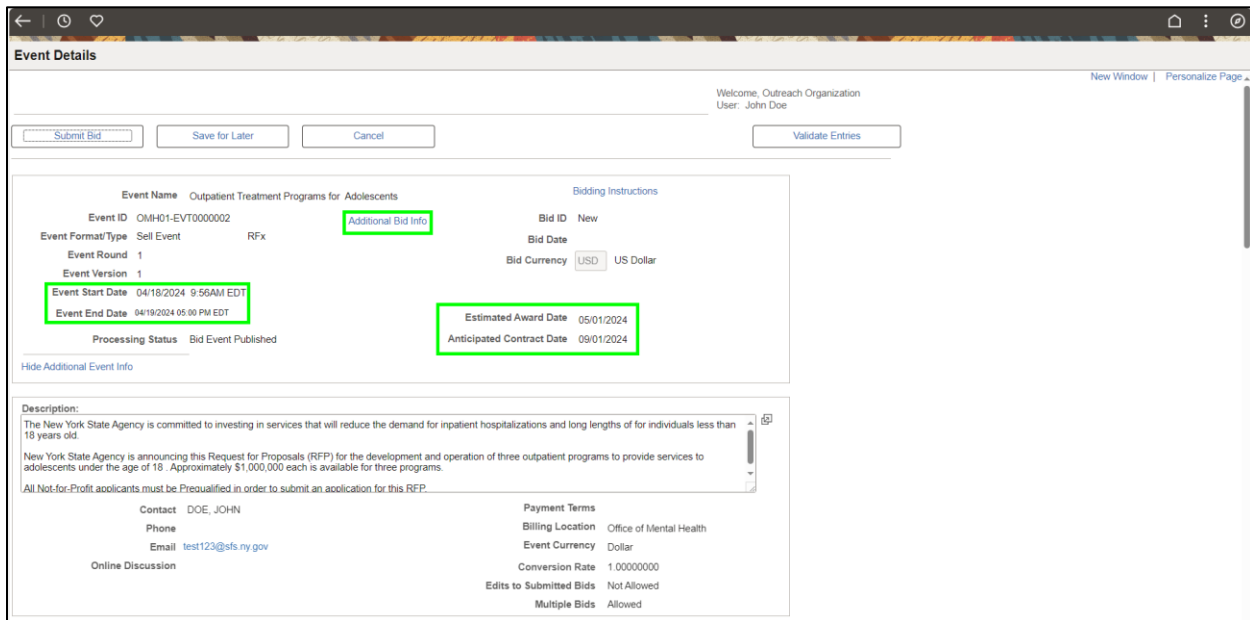
Step	Action
3.	Enter the applicable search criteria in the Search Criteria fields. In this example, select the Search by Status field drop-down list and click Available from the list.
4.	Click the Search button. 
5.	Note: A list of Event IDs will populate based on the search criteria entered. Click an Event ID link to initiate a bid response. In this example, we will click the Bid Event EVT0000002 link to initiate a bid response.

SFS Handbook: Grantee Processing in SFS



Step	Action
6.	Click the Bid on Event button.

Bid on Event



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		Questions & Answers Post Type
Bidders Conference Application Workshop		Provide a Link
Contract Type	Fixed	Questions & Answers Link
Length	12	Questions and Answers Upload
Narrative	<input type="text" value="test"/>	Questions and Answers Narrative
		<input type="text" value="test"/>

OK

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	Your Total Bid Price	
1	Period Details -1		Line 1	EA	<input type="text"/>		<input type="button" value="🗨️"/>

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](#)

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
X

Business Unit: OMH01 Event ID: EVT0000002 Event Round: 1 Event Version: 1

Attachments

[View Event Attachments](#) ?

1-1 of 1

Attached File	Attachment Description	Event RFX Doc	Upload	View	
		<input type="checkbox"/>	<input type="button" value="Upload"/>	<input type="button" value="View"/>	

[Add New Attachments](#) ?

1-2 of 2

Attached File	Attachment Description	Upload	View		
Instructions_document.pdf	<input type="text"/>	<input type="button" value="Upload"/>	<input type="button" value="View"/>	Add New Attachments	Delete
Reporting_Template.pdf	<input type="text"/>	<input type="button" value="Upload"/>	<input type="button" value="View"/>	Add New Attachments	Delete

Comments

[Add New Comments](#) ?

Please review attached instructions before responding to bid event]

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

Event Details

Event ID: OMH01-EVT0000002 Additional Bid Info Bid ID: New

Event Format/Type: Sell Event RFX Bid Date

Event Round: 1 Bid Currency: USD US Dollar

Event Version: 1

Event Start Date: 04/18/2024 9:56AM EDT Estimated Award Date: 05/01/2024

Event End Date: 04/19/2024 05:00 PM EDT Anticipated Contract Date: 09/01/2024

Processing Status: Bid Event Published

[Hide Additional Event Info](#)

Description:

The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of for individuals less than 18 years old.

New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18. Approximately \$1,000,000 each is available for three programs.

All Not-for-Profit applicants must be Prequalified in order to submit an application for this RFP.

Contact: DOE, JOHN	Payment Terms
Phone	Billing Location: Office of Mental Health
Email: test123@sfs.ny.gov	Event Currency: Dollar
Online Discussion	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: 5	DUNS Number: <input type="text"/>	Site/Project Address: <input type="text"/>
Required Questions: 5	Organization Website: <input type="text"/>	Bidder Contact Information
Questions Responded To: 0	User Name: Doe, John	Name: <input type="text"/>
		Telephone: <input type="text"/>
		Email: <input type="text"/>

[Hide Event Questions](#)

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 your Organization Website in the Organization Website field. This field is optional and not required.
14.	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>
15.	Click the Site/Project Address link.

Bid Response address fields ×

Site/Project Address
Q
|
<
<
1 of 1
>
>
|
View All

+
-

Address Line 1

Address Line 2

City

Postal Code

State

OK
Cancel

Step	Action
16.	Enter Address Details , including the following information: <ul style="list-style-type: none"> • Address Line 1 • Address Line 2 (if applicable) • City

SFS Handbook: Grantee Processing in SFS

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

Event Details

Event Questions

*Bid Required Ideal Response Required

General Questions < 1 of 5 >

* How many clients do you anticipate servicing in the first year of programming?

Response Weighting: Add Comments or Attachments

Best 0
Worst 0

* Provide intake form for incoming clients.

* Describe the agency's experience serving adolescents with serious mental illness. Describe any outpatient programming that the agency has operated in the past.

Response Weighting: Add Comments or Attachments

* Choose the types of service you will provide during outpatient programming. If you choose medication management, please upload a copy of the MD's license who will be supervising.

Response

Weighting: Add Comments or Attachments

Step	Action
18.	<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:</p> <ul style="list-style-type: none"> • Text responses are limited to 2,000 characters. Comments/Attachments can be utilized to add additional text if the 2,000-character limit is met. • The ability to add a Comment/Attachment will vary based on the question.

SFS Handbook: Grantee Processing in SFS

Event Details

Welcome, Outreach Organization
User: John Doe

Submit Bid **Save for Later** Cancel Validate Entries

Event Name: Outpatient Treatment Programs for Adolescents
Event ID: OMH01-EVT0000002
Event Format/Type: Sell Event RFX
Event Round: 1
Event Version: 1
Event Start Date: 04/18/2024 9:56AM EDT
Event End Date: 04/19/2024 05:00 PM EDT
Processing Status: Bid Event Published

Bidding Instructions
Bid ID: New
Bid Date:
Bid Currency: USD US Dollar
Estimated Award Date: 05/01/2024
Anticipated Contract Date: 09/01/2024

Description:
The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of stay for individuals less than 18 years old.
New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18. Approximately \$1,000,000 each is available for three programs.
All Not-for-Profit applicants must be Prequalified in order to submit an application for this RFP.

Contact: DOE, JOHN
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
19.	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
20.	In the resulting popup, click the OK button to save your progress.

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

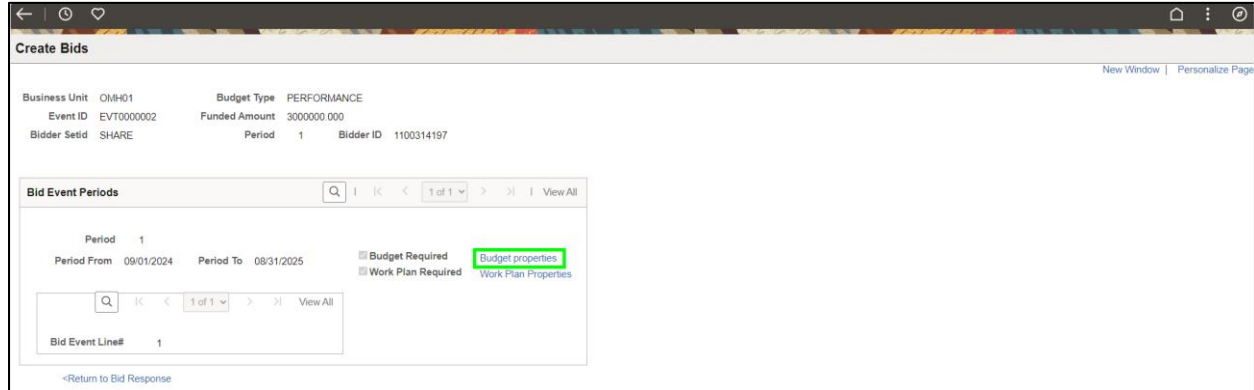
★ Bid Required Line Comments/Files

Lines

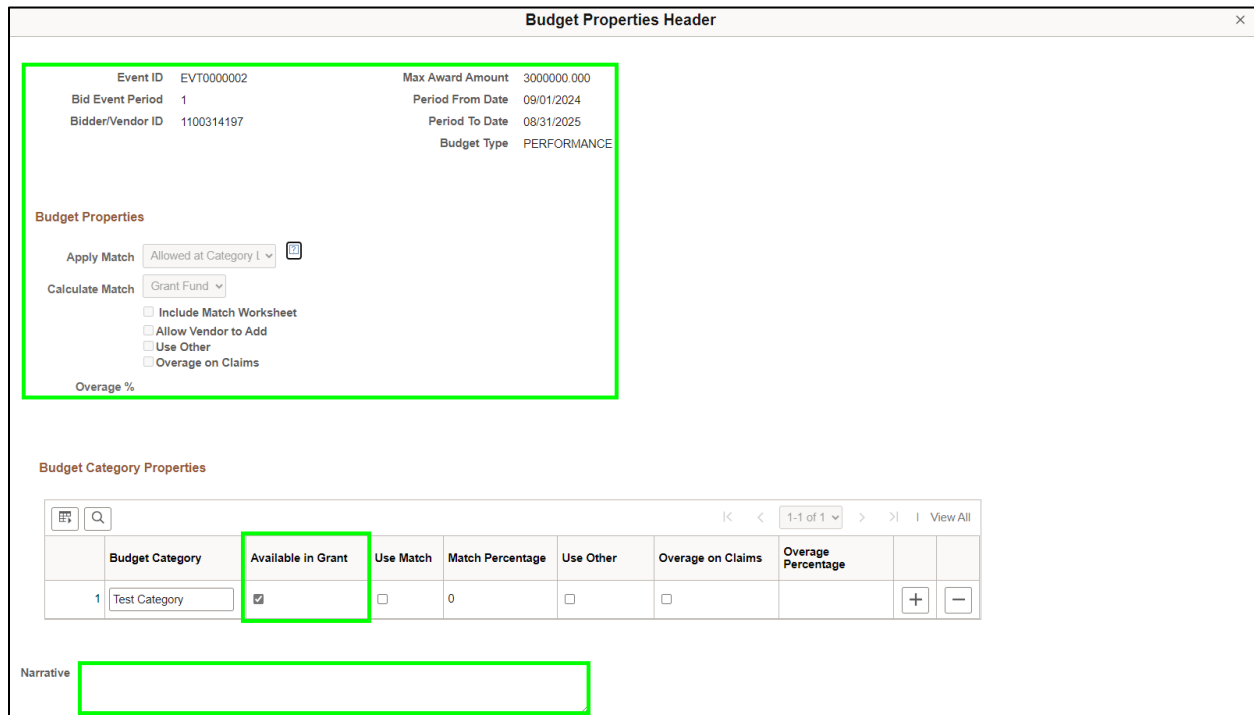
Line	Period	Item ID	Description	Unit	Your Unit Bid Price	Your Total Bid Price
1	Period Details -1		Line 1	EA	<input type="text"/>	

SFS Handbook: Grantee Processing in SFS

Step	Action
21.	Scroll to the bottom of the page. Under the Lines section, click the Period Details - 1 link under the Period column to access budget and work plan information.



Step	Action
22.	Click the Budget properties link.



Step	Action
23.	Review the Budget Header Information . This section was completed by the agency.

SFS Handbook: Grantee Processing in SFS

Step	Action
24.	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.

Budget Properties Header ×

Event ID: EVT0000002 Max Award Amount: 3000000.000
 Bid Event Period: 1 Period From Date: 09/01/2024
 Bidder/Vendor ID: 1100314197 Period To Date: 08/31/2025
 Budget Type: PERFORMANCE

Budget Properties

Apply Match: Allowed at Category L

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"/>		<input style="border: 2px solid green;" type="button" value="+"/>	<input type="button" value="-"/>

Narrative:

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

SFS Handbook: Grantee Processing in SFS

Budget Properties Header ✕

Event ID	EVT0000002	Max Award Amount	3000000.000
Bid Event Period	1	Period From Date	09/01/2024
Bidder/Vendor ID	1100314197	Period To Date	08/31/2025
		Budget Type	PERFORMANCE

Budget Properties

Apply Match Allowed at Category L ?

Calculate Match Grant Fund v

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

Step	Action
26.	Enter the applicable deliverable or outcome into the Budget Category field.
27.	Click the Available in Grant checkbox so the budget category details can be entered for the category.
28.	<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>

SFS Handbook: Grantee Processing in SFS

Budget Properties Header
X

	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

	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
29.	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 ×

Budget Type PERFORMANCE

Budget Category Test Category

Match % Required

Category Details

1-1 of 1

	Type/Description	Grant Funds	Match Funds	Match %	Other funds	Total Funds
1	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" 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
30.	Leave the Type/Description field blank.
31.	Enter the applicable value into the Grant Funds field. In this example, we will enter 10,000 in the Grant Funds field.
32.	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.
33.	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.
34.	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.

SFS Handbook: Grantee Processing in SFS

Step	Action
	In this example, we will leave this field blank.
35.	Click the OK button.
36.	Under the Period Budget Summary section, click on Category Details icon for the second budget category.
37.	Leave the Type/Description field blank.
38.	Enter the applicable value into the Grant Funds field. In this example, enter 10,000 in the Grant Funds field.
39.	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.
40.	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.
41.	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.
42.	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"/>	
2 Test Category 2	<input checked="" 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 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
43.	Click the Save button.
44.	Click the Back button.

Create Bids

Business Unit: OM/H01 Budget Type: PERFORMANCE
 Event ID: EVT0000002 Funded Amount: 3000000.00
 Bidder Setid: SHARE Period: 1 Bidder ID: 1100314197

Bid Event Periods

Period: 1
 Period From: 09/01/2024 Period To: 08/31/2025

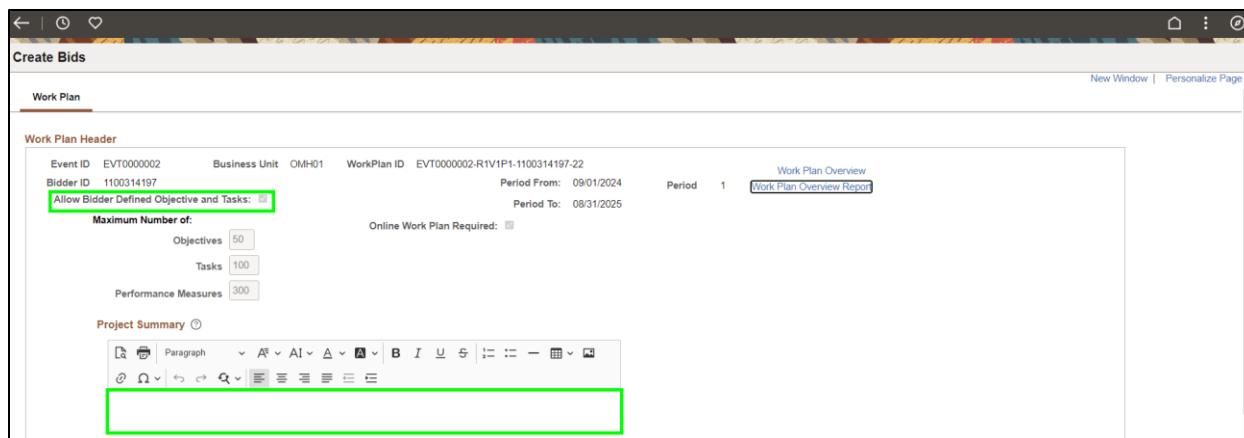
Budget Required [Budget properties](#)
 Work Plan Required [Work Plan Properties](#)

Bid Event Line# 1

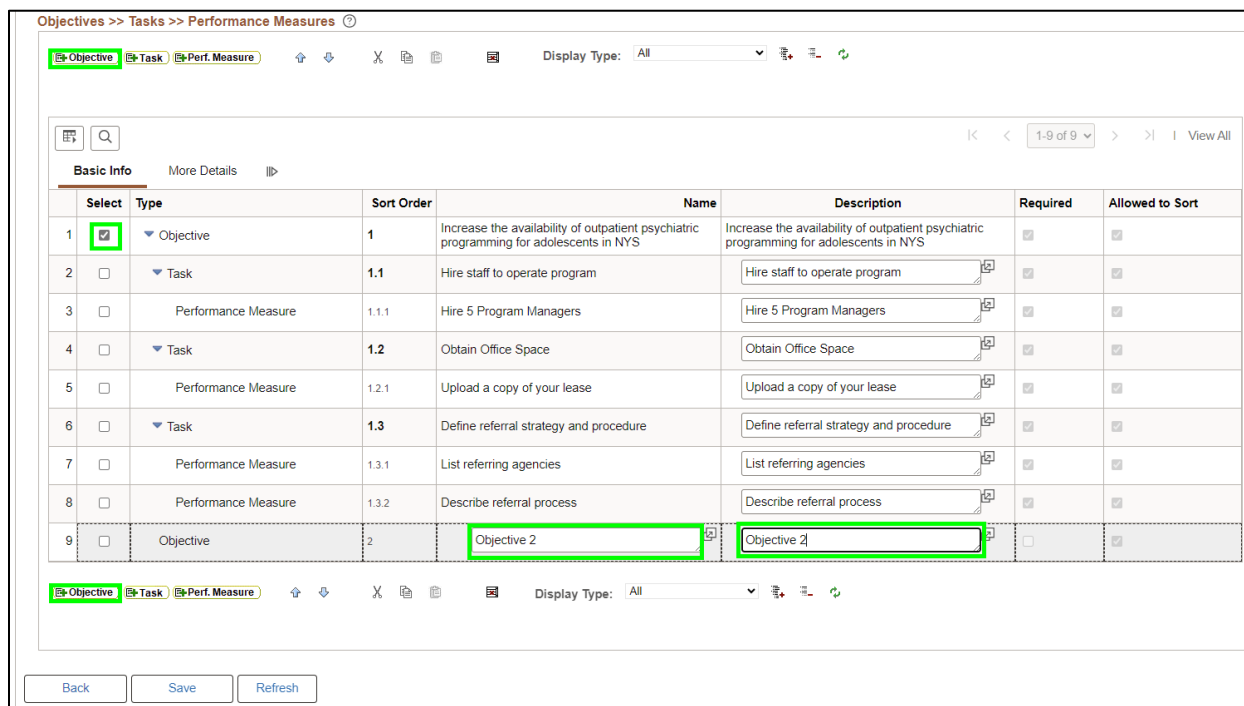
[Return to Bid Response](#)

Step	Action
45.	Click the Work Plan Properties link.

SFS Handbook: Grantee Processing in SFS



Step	Action
46.	Review the Work Plan Header information and verify the Allow Bidder Defined Objectives and Tasks is selected.
47.	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.
48.	Enter the applicable value into the Project Summary field.



SFS Handbook: Grantee Processing in SFS

Step	Action
49.	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.
50.	Click the + Objective button.
51.	On the Objective row, enter the applicable value in the Name field.
52.	On the Objective 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
<input type="checkbox"/>	Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.1	Hire staff to operate program	Hire staff to operate program	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.2	Obtain Office Space	Obtain Office Space	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.3.1	List referring agencies	List referring agencies	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.3.2	Describe referral process	Describe referral process	<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 4	Task 4	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Objective Task Perf. Measure Display Type: All

Back Save Refresh

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

SFS Handbook: Grantee Processing in SFS

Objective Task **Perf. Measure** Display Type: All

Basic Info More Details

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
<input type="checkbox"/>	Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.1	Hire staff to operate program	Hire staff to operate program	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.2	Obtain Office Space	Obtain Office Space	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.3.1	List referring agencies	List referring agencies	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.3.2	Describe referral process	Describe referral process	<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 4	Task 4	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	2.1.1	PM 5	PM 5	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Objective Task **Perf. Measure** Display Type: All

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

Objective Task Perf. Measure Display Type: All

Basic Info More Details

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
<input type="checkbox"/>	Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.1	Hire staff to operate program	Hire staff to operate program	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.2	Obtain Office Space	Obtain Office Space	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.3.1	List referring agencies	List referring agencies	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.3.2	Describe referral process	Describe referral process	<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 4	Task 4	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	2.1.1	PM 5	PM 5	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Objective Task Perf. Measure Display Type: All

SFS Handbook: Grantee Processing in SFS

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

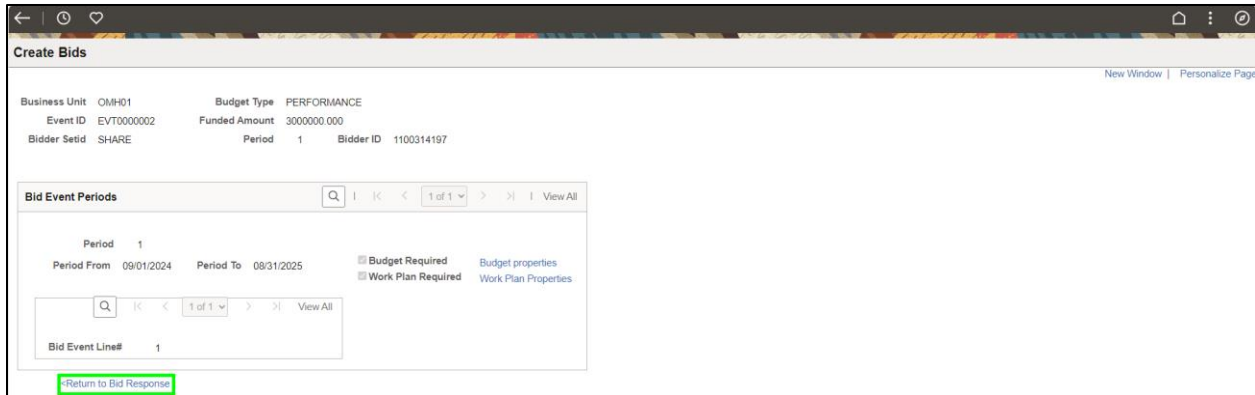
	Sort Order	Name	Description	Required	Allowed to Sort	Allow Performance Measure	Perf Measure Response Type	Numeric (Target/Goal)
	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	<input type="checkbox"/>	<input type="checkbox"/>			
	1.1	Hire staff to operate program	Hire staff to operate program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	<input type="checkbox"/>	<input type="checkbox"/>		Numeric	5
	1.2	Obtain Office Space	Obtain Office Space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	<input type="checkbox"/>	<input type="checkbox"/>		Attachment	
	1.3	Define referral strategy and procedure	Define referral strategy and procedure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Measure	1.3.1	List referring agencies	List referring agencies	<input type="checkbox"/>	<input type="checkbox"/>		Text/Comment	
Measure	1.3.2	Describe referral process	Describe referral process	<input type="checkbox"/>	<input type="checkbox"/>		Text/Comment	
	2	Objective 2	Objective 2	<input type="checkbox"/>	<input type="checkbox"/>			
	2.1	Task 4	Task 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Measure	2.1.1	PM 5	PM 5	<input type="checkbox"/>	<input type="checkbox"/>		Numeric	100

Display Type: All

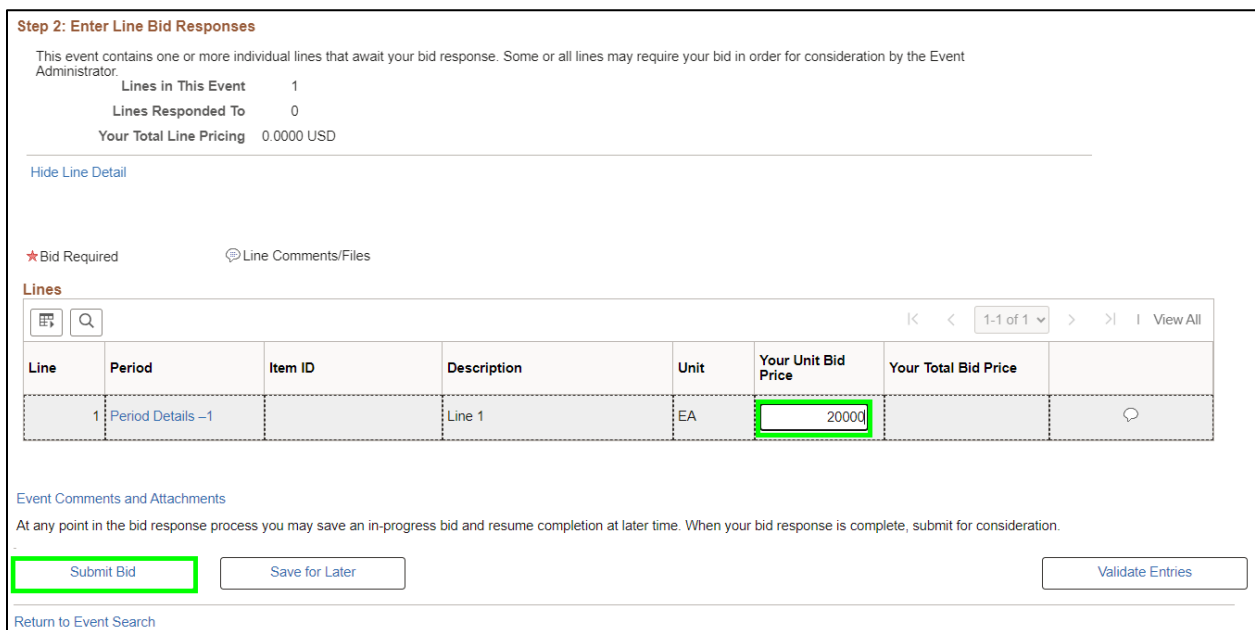
Back Save Refresh

Step	Action
62.	<p>Note: Available Performance Measure options are:</p> <ul style="list-style-type: none"> • Attachment • Date • 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>
63.	<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>
64.	Click the Save button.
65.	Click the Back button.

SFS Handbook: Grantee Processing in SFS



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



Step	Action
67.	<p>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.</p> <p>In this example, we will enter 20,000 in the Your Unit Bid Price field.</p>
68.	When you are ready to submit your bid response, click the Submit Bid button.

SFS Handbook: Grantee Processing in SFS

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
69.	In the resulting popup, click the Yes button to confirm you would like to submit the bid.
70.	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

SFS role(s) required to perform this task:

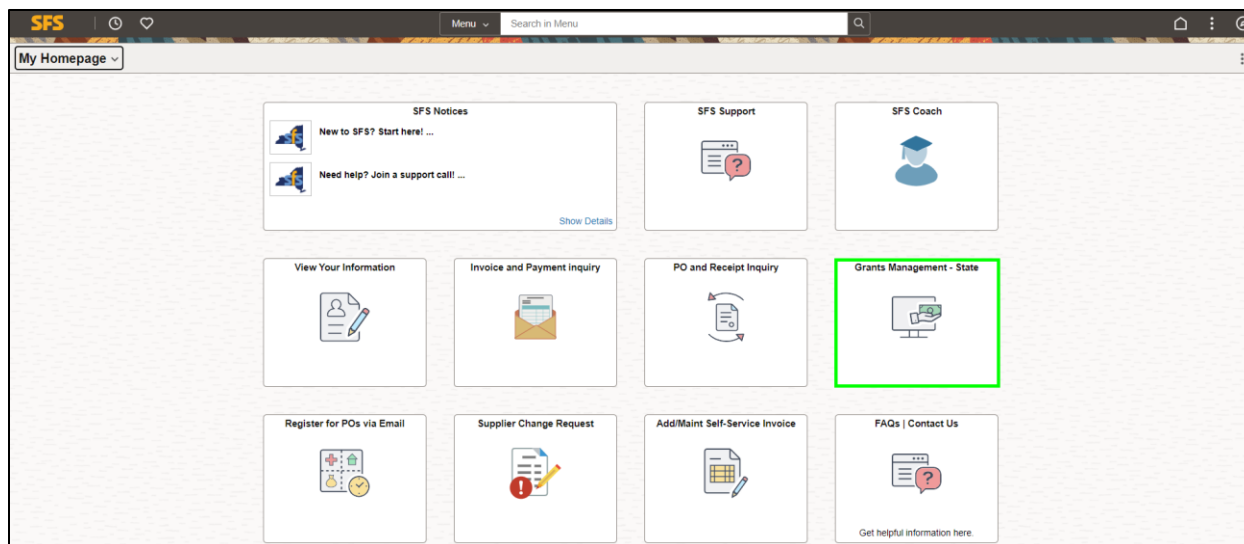
- Bid Response Initiator (NY_GM_VENDOR_EVENT_INITIATE)
 - **Note:** This role allows you to initiate a bid response to a bid event but not submit the bid response to the agency.
- Bid Response Submitter (NY_GM_VENDOR_EVENT_SUBMIT)
 - **Note:** This role allows you to both initiate a bid response and submit a bid response to the agency.


Procedure

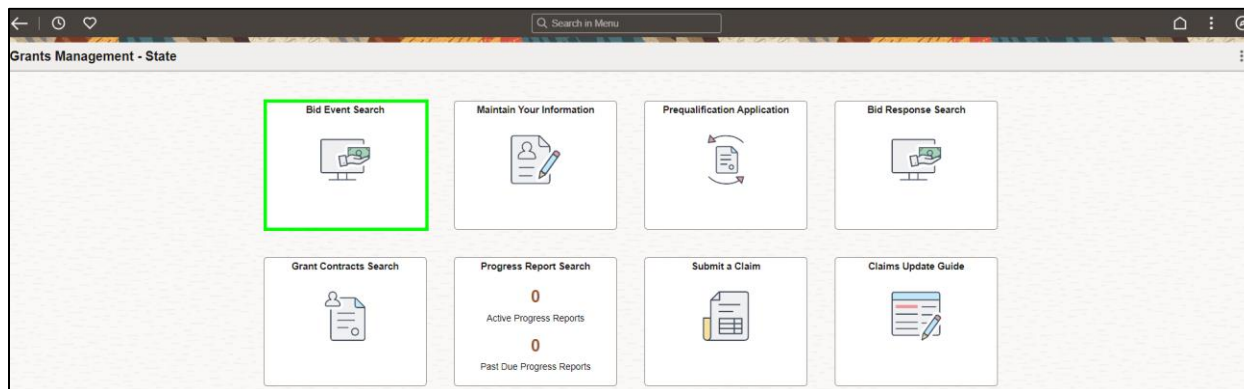
Scenario: You will log in to the SFS Vendor Portal, search for an available bid event (grant opportunity) and respond to the agency questions. You will also enter your budget, work plan information, and your bid price before submitting to the agency for review.

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

View Events and Place Bids

Welcome, Outreach Organization
User: John Doe

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

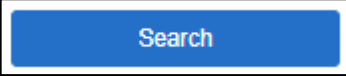
Search by Funding Agency

Search by Service Area

Search

Search Results

Event ID	Funding Agency	Grant Opportunity	Status	Eligibility	Availability Date	Anticipated Release Date
EVT0000001	OMH01	Outpatient Treatment Programs for Adolescents	Available	Not-For-Profit	04/17/24 2:01PM	04/17/24 2:01PM
EVT0000002	OMH01	Outpatient Treatment Programs for Adolescents	Available	Not-For-Profit	04/18/24 9:56AM	04/18/24 9:56AM
EVT0000003	OMH01	Outpatient Treatment Programs for Adolescents	Available	Not-For-Profit	04/19/24 9:18AM	04/19/24 9:18AM

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.

Event Details

Welcome, Outreach Organization
User: John Doe

[Information On Inquiry Options](#)

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

Event Name: Outpatient Treatment Programs for Adolescents
Event ID: OMH01-EVT0000003
Event Format/Type: Sell Event RFX
Event Round: 1
Event Version: 1
Event Start Date: 04/19/2024 9:18AM EDT
Event End Date: 04/25/2024 05:00 PM EDT

Event Description:
The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of stay for individuals less than 18 years old.
New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18. Approximately \$1,000,000 each is available for three programs.

Contact: DOE, JOHN
Phone: lest123@sfs.ny.gov
Email: lest123@sfs.ny.gov
Online Discussion: [Live Chat Help](#)

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

SFS Handbook: Grantee Processing in SFS

Step	Action
6.	Click the Bid on Event button. <div style="border: 1px solid blue; padding: 5px; display: inline-block; margin-top: 10px;">Bid on Event</div>

Event Details

Welcome, Outreach Organization
User: John Doe

Submit Bid Save for Later Cancel Validate Entries

Event Name: Outpatient Treatment Programs for Adolescents
Event ID: OMIH01-EVT000003
Event Format/Type: Sell Event RFX
Event Round: 1
Event Version: 1
Event Start Date: 04/19/2024 9:18AM EDT
Event End Date: 04/25/2024 05:00 PM EDT
Processing Status: Bid Event Published

Bidding Instructions
Bid ID: New
Bid Date:
Bid Currency: USD US Dollar

Estimated Award Date: 05/01/2024
Anticipated Contract Date: 09/01/2024

Description:
The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of stay for individuals less than 18 years old.
New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18. Approximately \$1,000,000 each is available for three programs.
All Not-for-Profit applicants must be Prequalified in order to submit an application for this RFP.

Contact: DOE, JOHN
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
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
Taxpayer Identification Number:
Bidders Conference Application: Workshop
Contract Type: Fixed
Length: 12
Narrative: test

Letter of Intent:
Questions & Answers Post Type: Provide a Link
Questions and Answers Upload: test
Questions and Answers Narrative: test

Questions & Answers Link

OK Cancel

SFS Handbook: Grantee Processing in SFS

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	Your Total Bid Price	
1	Period Details -1		Line 1	EA	<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.

[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: EVT0000003 Event Round: 1 Event Version: 1

Attachments

View Event Attachments ⓘ

1-1 of 1

Attached File	Attachment Description	Event RFX Doc	Upload	View
		<input type="checkbox"/>	<input type="button" value="Upload"/>	<input type="button" value="View"/>

Add New Attachments ⓘ

1-2 of 2

Attached File	Attachment Description	Upload	View	
Instructions_document.pdf	<input type="text"/>	<input type="button" value="Upload"/>	<input type="button" value="View"/>	Add New Attachments Delete
Reporting_Template.pdf	<input type="text"/>	<input type="button" value="Upload"/>	<input type="button" value="View"/>	Add New Attachments Delete

Comments

Add New Comments ⓘ

Please review attached instructions before responding to bid event.

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

Event Details

Event ID: OMH01-EVT0000003 Additional Bid Info Bid ID: New Event Format/Type: Sell Event RFX Bid Date: Event Round: 1 Bid Currency: USD US Dollar Event Version: 1 Event Start Date: 04/19/2024 9:18AM EDT Event End Date: 04/25/2024 05:00 PM EDT Estimated Award Date: 05/01/2024 Processing Status: Bid Event Published Anticipated Contract Date: 09/01/2024	
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--

[Hide Additional Event Info](#)

Description:

The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of for individuals less than 18 years old.

New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18. Approximately \$1,000,000 each is available for three programs.

All Not-for-Profit applicants must be Prequalified in order to submit an application for this RFP.

Contact: DOE, JOHN 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: 5 Required Questions: 5 Questions Responded To: 0	DUNS Number: <input type="text"/> Organization Website: <input type="text"/> User Name: Doe, John
----------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------

Site/Project Address: Bidder Contact Information: Name: <input type="text"/> Telephone: <input type="text"/> Email: <input type="text"/>	
------------------------------------------------------------------------------------------------------------------------------------------------------	--

[Hide Event Questions](#)

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 your Organization Website in the Organization Website field. This field is optional and not required.
14.	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>
15.	Click the Site/Project Address link.

Bid Response address fields ×

Site/Project Address | 1 of 1 |

Address Line 1

Address Line 2

City

Postal Code

State

Step	Action
16.	Enter Address Details , including the following information: <ul style="list-style-type: none"> • Address Line 1 • Address Line 2 (if applicable) • City • Postal Code

SFS Handbook: Grantee Processing in SFS

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

Step	Action
18.	<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:</p> <ul style="list-style-type: none"> • Text responses are limited to 2,000 characters. Comments/Attachments can be utilized to add additional text if the 2,000-character limit is met. • The ability to add a Comment/Attachment will vary based on the question.

SFS Handbook: Grantee Processing in SFS

Event Details

Welcome, Outreach Organization
User: John Doe

Message not found

Submit Bid **Save for Later** Cancel Validate Entries

Event Name: Outpatient Treatment Programs for Adolescents

Event ID: OMH01-EVT0000003

Event Format/Type: Sell Event RFX

Event Round: 1

Event Version: 1

Event Start Date: 04/19/2024 9:18AM EDT

Event End Date: 04/25/2024 05:00 PM EDT

Processing Status: Bid Event Published

Bidding Instructions: Bid ID 1

Bid Date

Bid Currency: USD US Dollar

Estimated Award Date: 05/01/2024

Anticipated Contract Date: 09/01/2024

Description:

The New York State Agency is committed to investing in services that will reduce the demand for inpatient hospitalizations and long lengths of stay for individuals less than 18 years old.

New York State Agency is announcing this Request for Proposals (RFP) for the development and operation of three outpatient programs to provide services to adolescents under the age of 18. Approximately \$1,000,000 each is available for three programs.

All Not-for-Profit applicants must be Prequalified in order to submit an application for this RFP.

Contact: DOE, JOHN

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
19.	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
20.	In the resulting popup, click the OK button to save your progress.

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

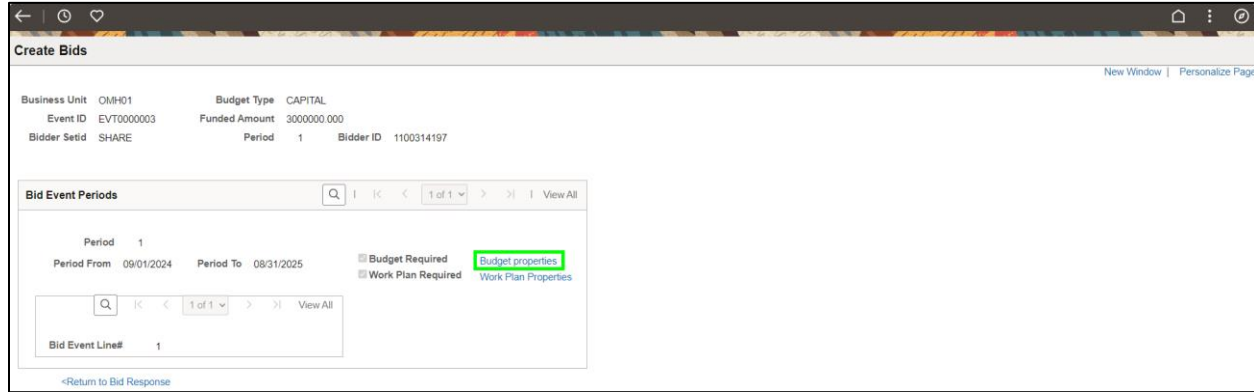
Lines

1-1 of 1 | View All

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	Your Total Bid Price
1	Period Details-1		Line 1	EA		

SFS Handbook: Grantee Processing in SFS

Step	Action
21.	Scroll to the bottom of the page. Under the Lines section, click the Period Details - 1 link under the Period column to access budget and work plan information.



Step	Action
22.	Click the Budget properties link.

SFS Handbook: Grantee Processing in SFS

Budget Properties Header

Event ID	EVT0000003	Max Award Amount	3000000.000
Bid Event Period	1	Period From Date	09/01/2024
Bidder/Vendor ID	1100314197	Period To Date	08/31/2025
		Budget Type	CAPITAL

Budget Properties

Apply Match Allowed at Category I ?

Calculate Match Grant Fund

Overage %

Budget Category Properties

	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
23.	Review the Budget Header Information . This section was completed by the agency.
24.	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 > >|

	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 % Calc	0.00
Match Funds	0.00	Other Funds	0.00
Total	0.00		

Step	Action
25.	<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>
26.	<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: 5px 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

Category Details

Budget Type CAPITAL
Match % Required

Budget Category SCOPING & PRE-DEVELOPMENT

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
27.	Leave the Type/Description field blank.
28.	Enter the applicable value into the Grant Funds field. In this example, we will enter 10,000 in 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 on to the next step.

SFS Handbook: Grantee Processing in SFS

Step	Action
31.	<p>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.</p> <p>In this example, we will leave this field blank.</p>
32.	Click the OK button.
33.	Under the Period Budget Summary section, click on Category Details icon for the Design budget category.
34.	Leave the Type/Description field blank.
35.	<p>Enter the applicable value into the Grant Funds field.</p> <p>In this example, we will enter 10,000 in the Grant Funds field.</p>
36.	<p>Enter the applicable value into the Match Funds field.</p> <p>In this example, we will leave this field blank.</p>
37.	<p>Enter the applicable value into the Other Funds field.</p> <p>Note: This field may be greyed out if it was not selected on the bid event; if greyed out, move onto next step.</p>
38.	<p>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.</p> <p>In this example, we will leave this field blank.</p>
39.	Click the OK button.

SFS Handbook: Grantee Processing in SFS

Budget Properties Header

Narrative

Period Budget Summary

	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
40.	Click the Save button.
41.	Click the Back button.

Create Bids

Business Unit: OMIH01 Budget Type: CAPITAL
 Event ID: EVT0000003 Funded Amount: 3000000.00
 Bidder Setid: SHARE Period: 1 Bidder ID: 1100314197

Bid Event Periods

Period: 1
 Period From: 09/01/2024 Period To: 09/31/2025

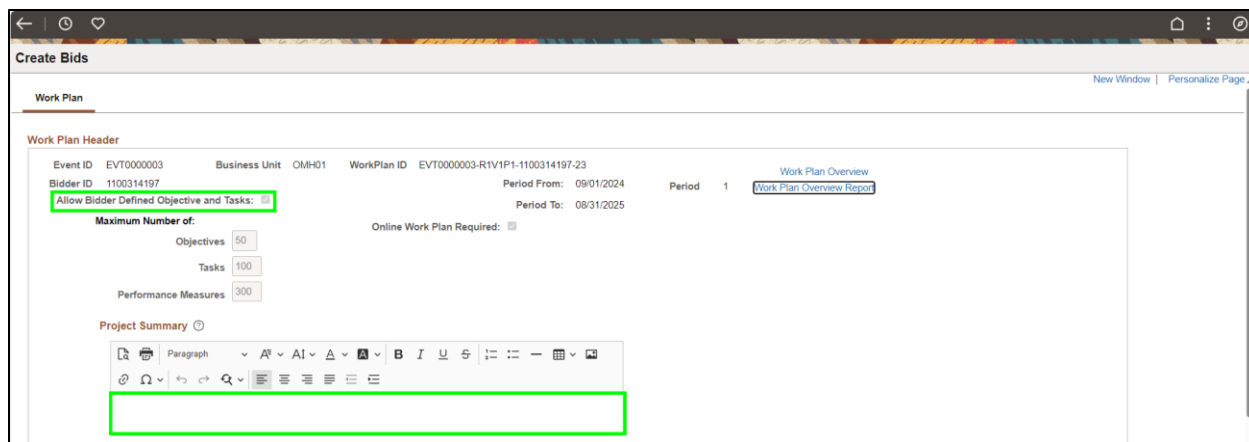
Budget Required [Budget properties](#)
 Work Plan Required [Work Plan Properties](#)

Bid Event Line# 1

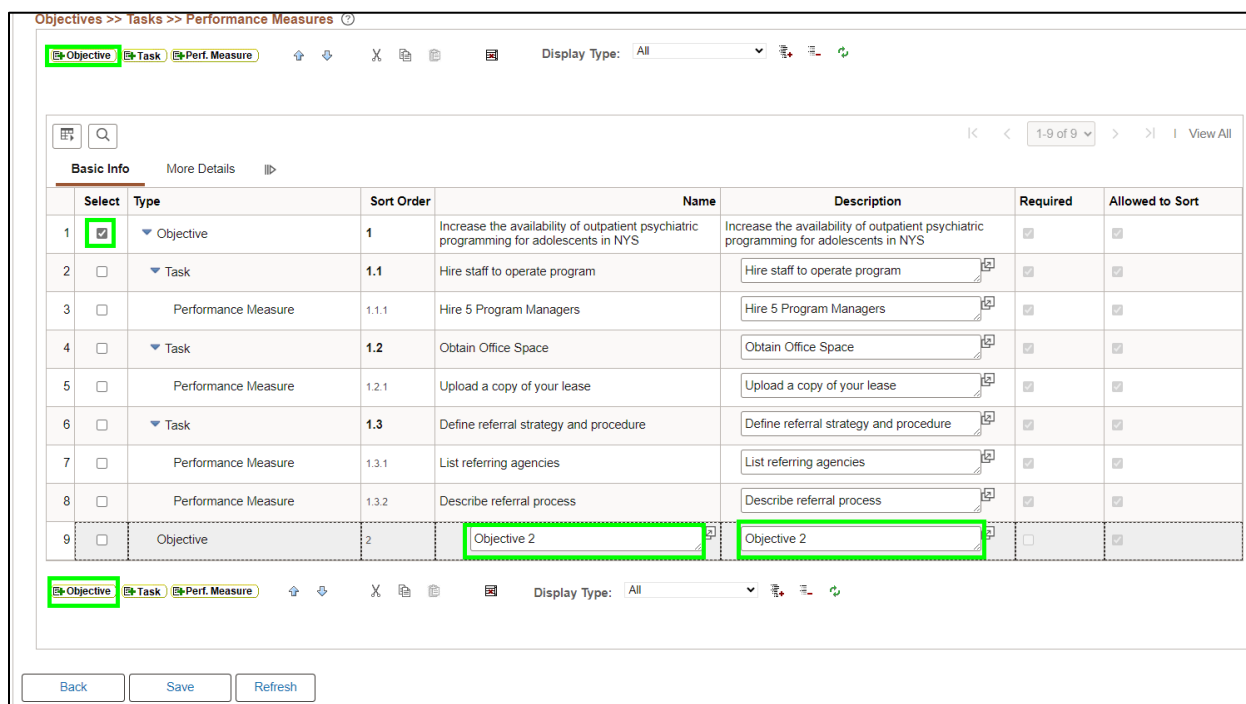
[Return to Bid Response](#)

Step	Action
42.	Click the Work Plan Properties link.

SFS Handbook: Grantee Processing in SFS



Step	Action
43.	Review the Work Plan Header information and verify the Allow Bidder Defined Objectives and Tasks is selected.
44.	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.
45.	Enter the applicable value into the Project Summary field.



SFS Handbook: Grantee Processing in SFS

Step	Action
46.	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.
47.	Click the + Objective button.
48.	On the Objective row, enter the applicable value in the Name field.
49.	On the Objective row, enter the applicable value in the Description field.

The screenshot displays the SFS interface for managing objectives and tasks. The table below represents the data shown in the interface:

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
<input type="checkbox"/>	Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.1	Hire staff to operate program	Hire staff to operate program	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.2	Obtain Office Space	Obtain Office Space	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.3.1	List referring agencies	List referring agencies	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.3.2	Describe referral process	Describe referral process	<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 4	Task 4	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Buttons at the bottom of the interface include Back, Save, and Refresh.

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

1-11 of 11 View All

Basic Info More Details

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
<input type="checkbox"/>	Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.1	Hire staff to operate program	Hire staff to operate program	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.2	Obtain Office Space	Obtain Office Space	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.3.1	List referring agencies	List referring agencies	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.3.2	Describe referral process	Describe referral process	<input 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 4	Task 4	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	2.1.1	Performance Measure 5	Performance Measure 5	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Objective Task Perf. Measure Display Type: All

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

Basic Info More Details **▶**

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
<input type="checkbox"/>	Objective	1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Task	1.1	Hire staff to operate program	Hire staff to operate program	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Task	1.2	Obtain Office Space	Obtain Office Space	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.2.1	Upload a copy of your lease	Upload a copy of your lease	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Task	1.3	Define referral strategy and procedure	Define referral strategy and procedure	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.3.1	List referring agencies	List referring agencies	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.3.2	Describe referral process	Describe referral process	<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 4	Task 4	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Performance Measure	2.1.1	Performance Measure 5	Performance Measure 5	<input type="checkbox"/>	<input type="checkbox"/>

Objective Task Perf. Measure Display Type: All

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

Sort Order	Name	Description	Required	Allowed to Sort	Allow Performance Measure	Perf Measure Response Type	Numeric (Target/Goal)
1	Increase the availability of outpatient psychiatric programming for adolescents in NYS	Increase the availability of outpatient psychiatric programming for adolescents in NYS	<input type="checkbox"/>	<input type="checkbox"/>			
1.1	Hire staff to operate program	Hire staff to operate program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
1.1.1	Hire 5 Program Managers	Hire 5 Program Managers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Numeric	5
1.2	Obtain Office Space	Obtain Office Space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
1.2.1	Upload a copy of your lease	Upload a copy of your lease	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Attachment	
1.3	Define referral strategy and procedure	Define referral strategy and procedure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
1.3.1	List referring agencies	List referring agencies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Text/Comment	
1.3.2	Describe referral process	Describe referral process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Text/Comment	
2	Objective 2	Objective 2	<input type="checkbox"/>	<input type="checkbox"/>			
2.1	Task 4	Task 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
2.1.1	PM 5	PM 5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Numeric	100

Display Type: All

Back Save Refresh

Step	Action
59.	<p>Note: Available Performance Measure options are:</p> <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>
60.	<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>
61.	Click the Save button.
62.	Click the Back button.

Step	Action
63.	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	Your Total Bid Price
1	Period Details -1		Line 1	EA	20000	

[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](#)

SFS Handbook: Grantee Processing in SFS

Step	Action
64.	<p>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.</p> <p>In this example, we will enter 20,000 in the Your Unit Bid Price field.</p>
65.	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
66.	In the resulting popup, click the Yes button to confirm you would like to submit the bid.
67.	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

SFS role(s) required to perform this task:

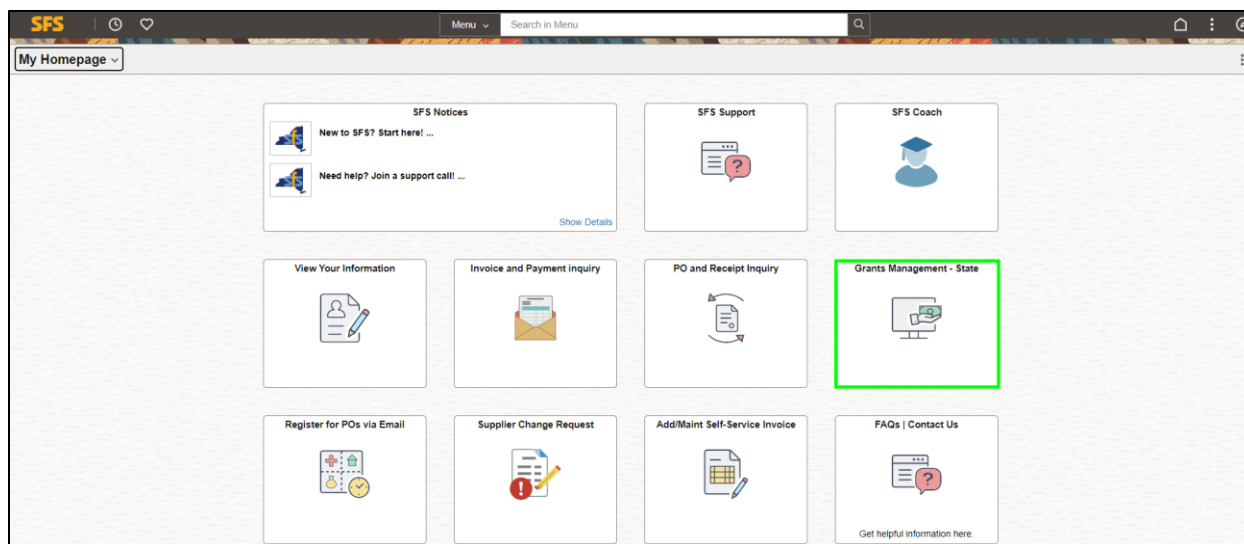
- Bid Response Initiator (NY_GM_VENDOR_EVENT_INITIATE)
 - **Note:** This role allows you to initiate a bid response to a bid event but not submit the bid response to the agency.
- Bid Response Submitter (NY_GM_VENDOR_EVENT_SUBMIT)
 - **Note:** This role allows you to both initiate a bid response and submit a bid response to the agency.


Procedure

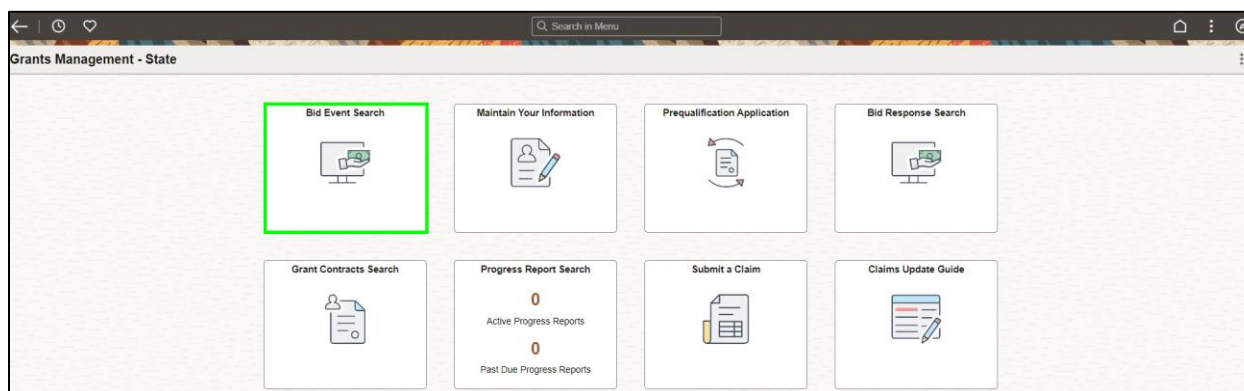
Scenario: You have a bid response already saved and in process. You will use the match worksheet to provide details on the budget amounts that have already been entered.

SFS Handbook: Grantee Processing in SFS

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.

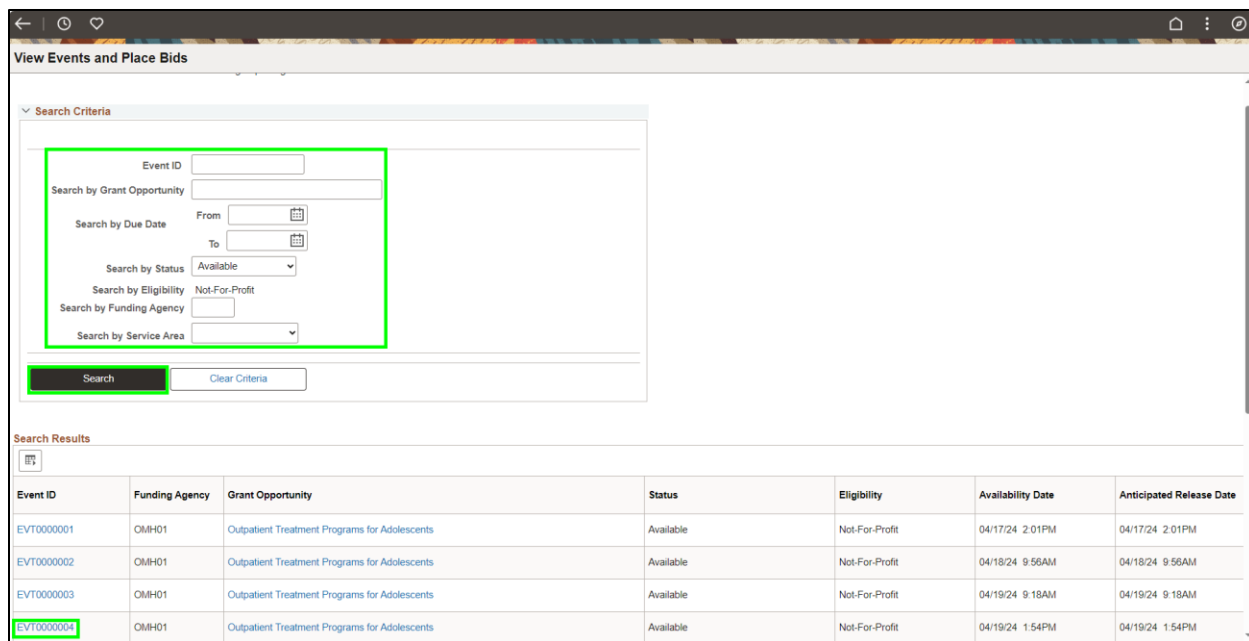


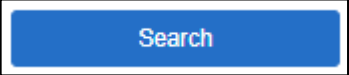
Step	Action
1.	<p>Preferred Navigation: Click the Grant Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > Manage Events and Place Bids > View Events and Place Bids</p>  <p>Note: You must log in to the SFS Vendor Portal to respond to a bid event.</p>



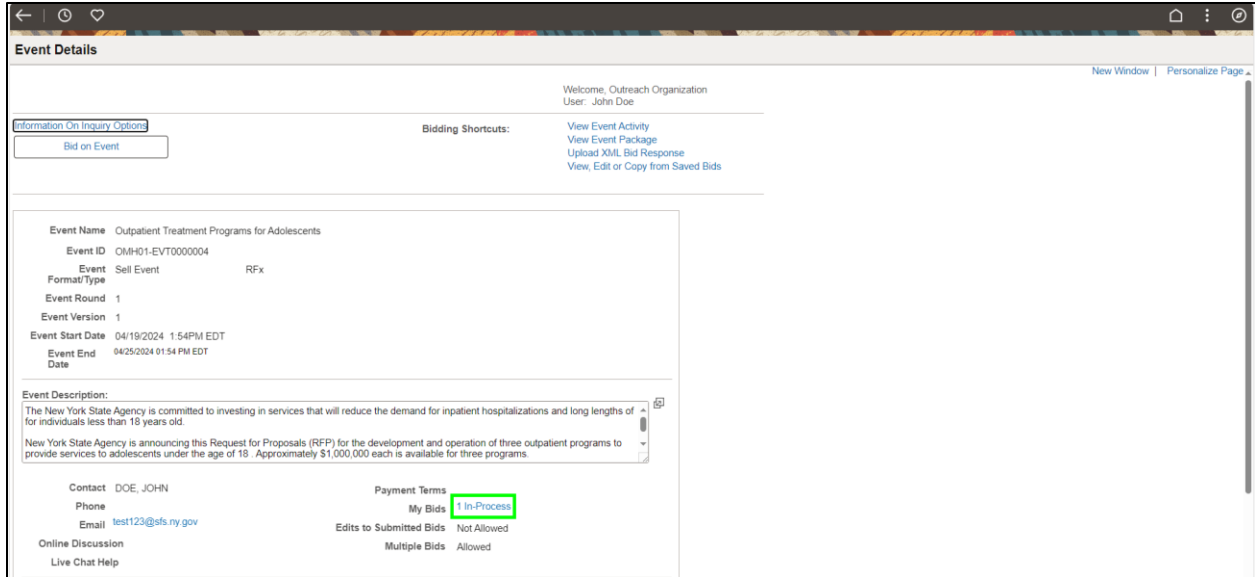
Step	Action
2.	Click the Bid Event Search tile.

SFS Handbook: Grantee Processing in SFS

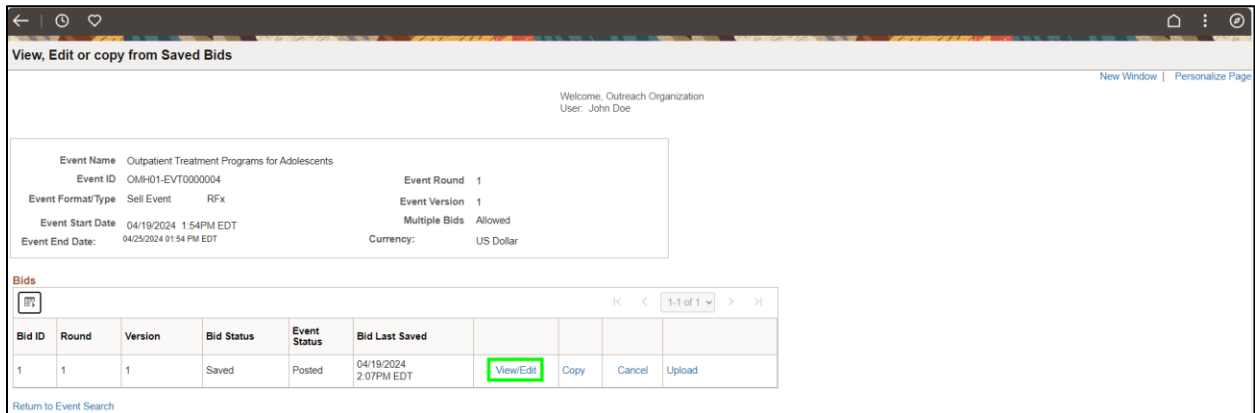


Step	Action
3.	Enter the applicable search criteria in the Search Criteria fields. In this example, select the Search by Status field drop-down list and click Available from the list.
4.	Click the Search button. 
5.	Click an Event ID link to update an in-process bid response. In this example, we will click the Bid Event EVT0000004 link to update a bid response.

SFS Handbook: Grantee Processing in SFS



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



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

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	Your Total Bid Price
1	Period Details -1		Line 1	EA	<input type="text"/>	

Step	Action
8.	Scroll to the bottom of the page of the existing bid response. Under the Lines section, click the Period Details -1 link under the Period column to access budget and work plan information for this bid response.

Create Bids

Business Unit: CMH01 Budget Type: EXPENDITURE
 Event ID: EVT0000004 Funded Amount: 3000000.000
 Bidder Setid: SHARE Period: 1 Bidder ID: 1100314197

Bid Event Periods

Period: 1
 Period From: 09/01/2024 Period To: 09/31/2025

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

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

Event ID	EVT0000004	Max Award Amount	3000000.000
Bid Event Period	1	Period From Date	09/01/2024
Bidder/Vendor ID	1100314197	Period To Date	08/31/2025
		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
10.	Click the Match Worksheet link.

SFS Handbook: Grantee Processing in SFS

x
Include Match Worksheet

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: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="border: none; background: none; text-align: center; font-size: 1.2em; font-weight: bold; padding: 2px 5px;" type="button" value="+"/>	<input style="border: none; background: none; text-align: center; font-size: 1.2em; font-weight: bold; padding: 2px 5px;" type="button" value="-"/>

Match Worksheet Detail Total 0.00

Budget Detail Match Total 0.00

Narrative

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

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	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	

Sub Totals

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

Step	Action
17.	Click the Save button and then click the Back button.

Create Bids New Window | Personalize Page

Business Unit: OM/H01 Budget Type: EXPENDITURE
 Event ID: EYT0000004 Funded Amount: 3000000.000
 Bidder SetId: SHARE Period: 1 Bidder ID: 1100314197

Bid Event Periods 1 of 1 | View All

Period: 1
 Period From: 09/01/2024 Period To: 08/31/2025

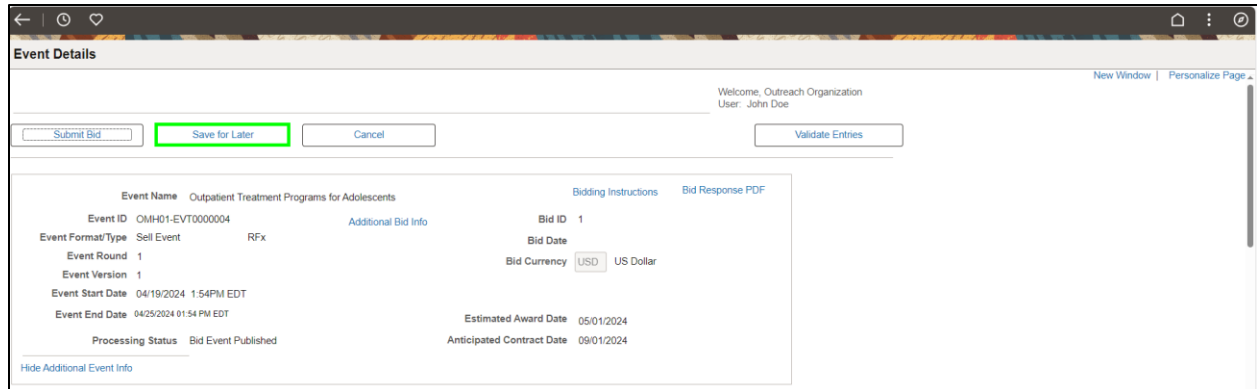
Budget Required [Budget properties](#)
 Work Plan Required [Work Plan Properties](#)

Bid Event Line#: 1

[←Return to Bid Response](#)

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

SFS Handbook: Grantee Processing in SFS



Step	Action
19.	Click the Save for Later button.
20.	You have successfully completed the Using the Match Worksheet for a Bid Response topic.

View Submitted Bid Responses

Topic Description:

This topic provides the knowledge and skills to view bid responses that have been submitted by your organization in the SFS Vendor Portal.

Topic Objectives:

In this topic, you will learn:

- How to view submitted bid responses.

SFS role(s) required to perform this task:

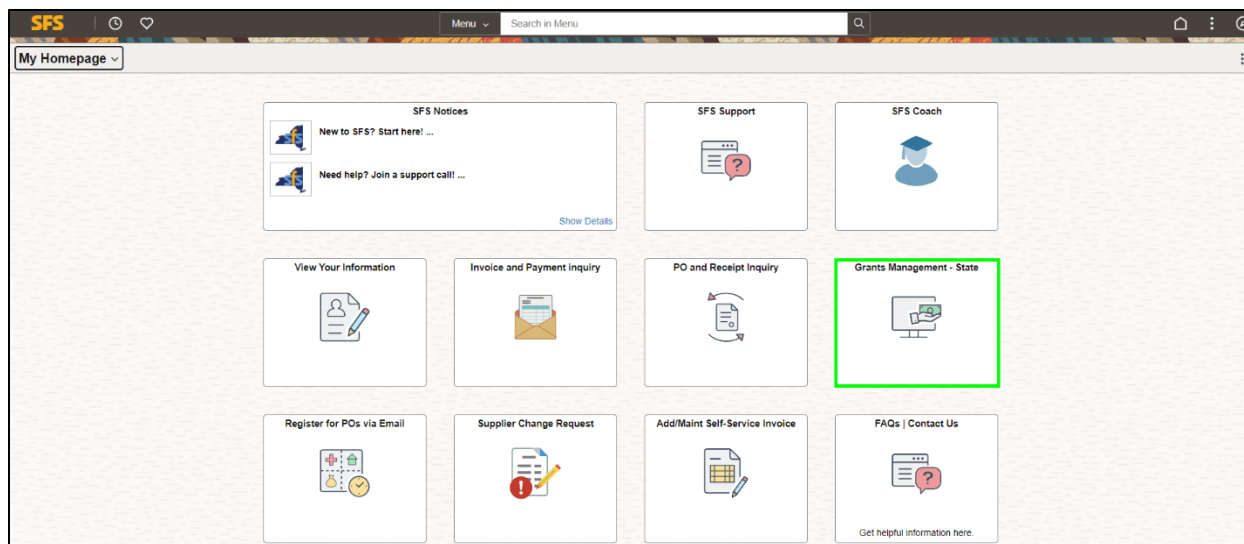
- Bid Response Initiator (NY_GM_VENDOR_EVENT_INITIATE) **or**
 - **Note:** This role allows you to initiate a bid response to a bid event but not submit the bid response to the agency.
- Bid Response Submitter (NY_GM_VENDOR_EVENT_SUBMIT)
 - **Note:** This role allows you to both initiate a bid response and submit a bid response to the agency.


Procedure

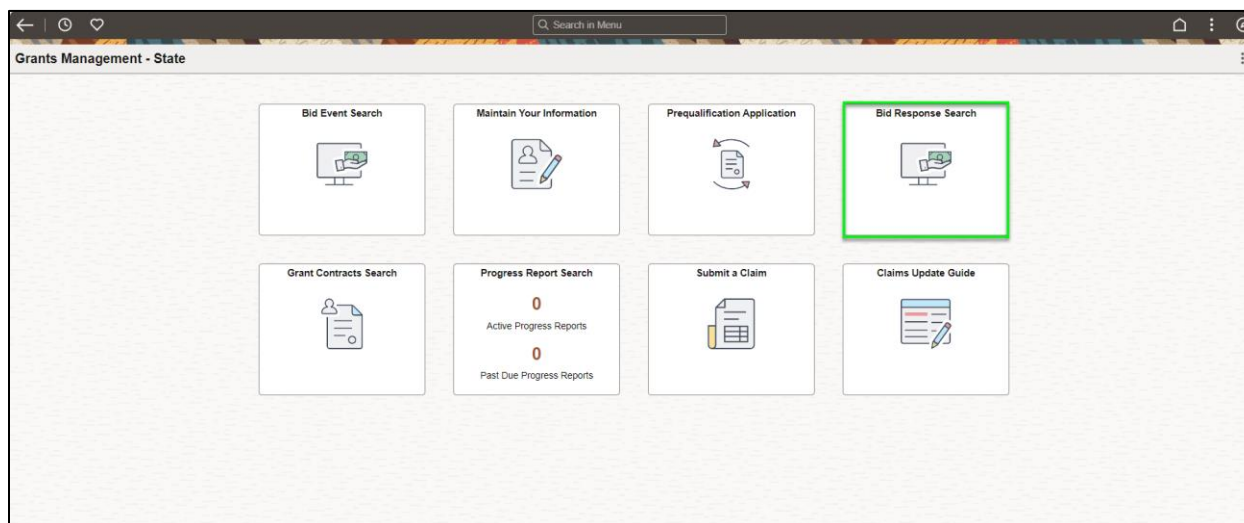
Scenario: You have recently completed and submitted a bid response in the SFS Vendor Portal, and you are interested in viewing the bid response to confirm that it was successfully submitted to the agency.

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>Click the Grant Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > Manage Events and Place Bids > My Event Activity.</p>  <p>Note: You must log in to the SFS Vendor Portal to view a response to a bid event.</p>



Step	Action
2.	Click the Bid Response Search tile.

SFS Handbook: Grantee Processing in SFS

Event Activity

Welcome [redacted]
User: John Doe

Event Activity Summary

Click on number to view events below

Events Invited To: **2** Events Bid On: **4** Events Awarded: **0**

Search Criteria

Event Format [dropdown] Events Invited To Events Bid On Events Awarded

Event Type [dropdown] Date Range: From [calendar] Through [calendar]

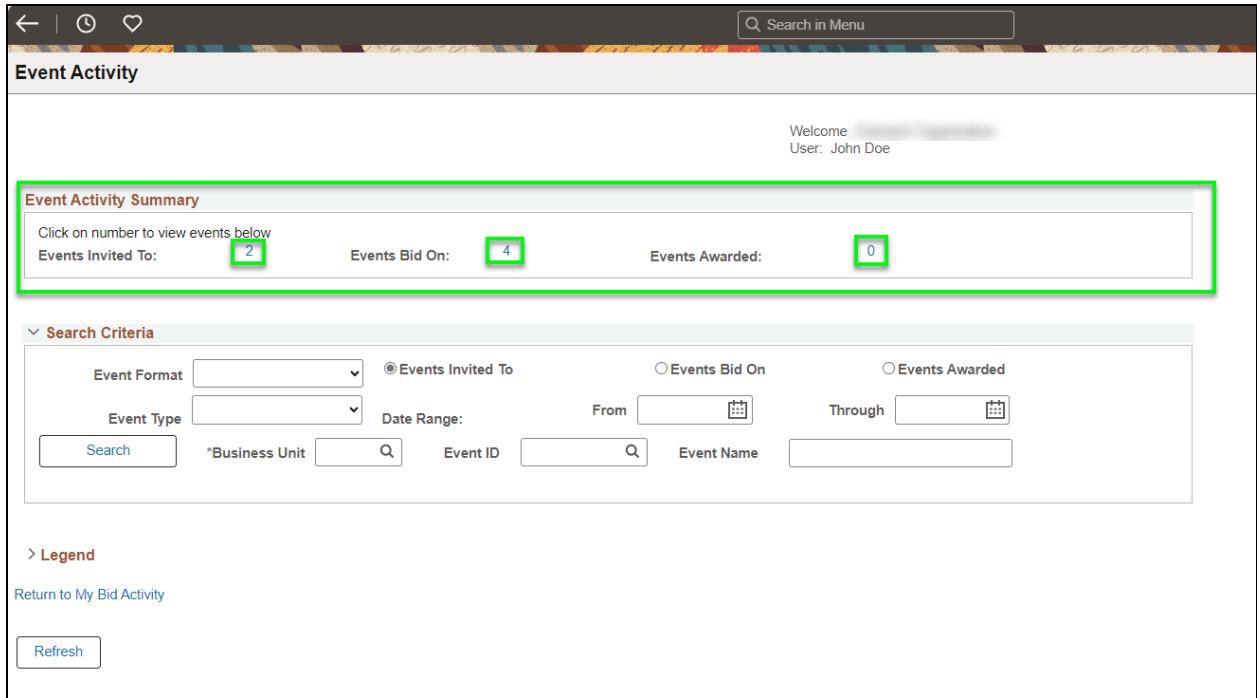
 *Business Unit [input] [magnifying glass] Event ID [input] [magnifying glass] Event Name [input]

> **Legend**

[Return to My Bid Activity](#)

Step	Action
3.	<p>The Event Activity page can be used to search for and view:</p> <ul style="list-style-type: none"> • Events you have been invited to bid on. • Events you have bid on (i.e., submitted a bid response for). • Events you have been awarded funding. <p>In this example, we will search for bid responses that we have submitted over a certain period of time.</p>

SFS Handbook: Grantee Processing in SFS



Step	Action
4.	<p>Notes:</p> <ul style="list-style-type: none"> • To quickly view the events you have been invited to bid on, select the hyperlinked number next to the Events Invited To field. • To quickly view the events you have bid on, select the hyperlinked number next to the Events Bid On field. • To quickly view the events you have been awarded funding, select the hyperlinked number next to the Events Awarded field.

SFS Handbook: Grantee Processing in SFS

The screenshot displays the 'Event Activity' interface. At the top, there is a navigation bar with a search menu. Below this, a welcome message reads 'Welcome, [redacted] User: John Doe'. The 'Event Activity Summary' section provides a quick overview: 'Click on number to view events below', with 'Events Invited To: 2', 'Events Bid On: 4', and 'Events Awarded: 0'. The 'Search Criteria' section, highlighted with a green border, offers various filters: 'Event Format' and 'Event Type' are dropdown menus; 'Events Invited To' is selected with a radio button, alongside 'Events Bid On' and 'Events Awarded'; 'Date Range' includes 'From' and 'Through' date pickers; and search fields are provided for '*Business Unit', 'Event ID', and 'Event Name'. Below the search criteria, there is a '> Legend' link, a 'Return to My Bid Activity' link, and a 'Refresh' button.

Step	Action
5.	<p>The Search Criteria section, below the Event Activity Summary section includes helpful criteria that can be used to further narrow down the list of events your organization has been invited to, bid on, and awarded.</p> <p>In this example, we will use the Search Criteria section to search for bid responses that we have submitted over a certain period of time.</p>

SFS Handbook: Grantee Processing in SFS

Event Activity

Welcome, [Redacted]
User: John Doe

Event Activity Summary

Click on number to view events below

Events Invited To: 2 Events Bid On: 4 Events Awarded: 0

Search Criteria

Event Format [Dropdown] Events Invited To **Events Bid On** Events Awarded

Event Type [Dropdown] Date Range: From [Calendar] Through [Calendar]

 *Business Unit [Search] Event ID [Search] Event Name [Text]

> **Legend**

[Return to My Bid Activity](#)

Step	Action
6.	To search for a list of bid events we have submitted a bid response for, select the Events Bid On radio button.

SFS Handbook: Grantee Processing in SFS

The screenshot shows the 'Event Activity' page in SFS. At the top, there is a navigation bar with a search menu. Below it, the page title 'Event Activity' is displayed. A welcome message for 'John Doe' is visible. The 'Event Activity Summary' section shows statistics: 'Events Invited To: 2', 'Events Bid On: 4', and 'Events Awarded: 0'. The 'Search Criteria' section includes filters for 'Event Format', 'Event Type', 'Date Range' (with 'From' and 'Through' fields), and radio buttons for 'Events Invited To', 'Events Bid On' (selected), and 'Events Awarded'. A 'Calendar' pop-up is open over the 'From' field, showing the month of May 2024 with the 24th highlighted. Other search fields include 'Business Unit', 'Event ID', and 'Event'. A 'Refresh' button is located at the bottom left of the search area.

Step	Action
7.	<p>To further narrow down our search based on a specific date range, we will use the From and Through fields.</p> <p>Enter the applicable date (format MM/DD/YYYY) in the From field or click the Calendar icon to select the date.</p>

SFS Handbook: Grantee Processing in SFS

Event Activity

Welcome, [Redacted]
User: John Doe

Event Activity Summary
Click on number to view events below
Events Invited To: 2 Events Bid On: 4 Events Awarded: 0

Search Criteria

Event Format: [Dropdown] Events Invited To Events Bid On Events Awarded

Event Type: [Dropdown] Date Range: From: 04/15/2024 [Calendar] Through: [Field] [Calendar]

[Search] *Business Unit: [Field] [Q] Event ID: [Field] [Q] Event Name: [Field]

> Legend
[Return to My Bid Activity](#)
[Refresh]

Step	Action
8.	Enter the applicable date (format MM/DD/YYYY) in the Through field or click the Calendar icon to select the date.

Event Activity

Welcome, [Redacted]
User: John Doe

Event Activity Summary
Click on number to view events below
Events Invited To: 2 Events Bid On: 4 Events Awarded: 0

Search Criteria

Event Format: [Dropdown] Events Invited To Events Bid On Events Awarded

Event Type: [Dropdown] Date Range: From: 04/15/2024 [Calendar] Through: 04/19/2024 [Calendar]

[Search] *Business Unit: [Field] [Q] Event ID: [Field] [Q] Event Name: [Field]

> Legend
[Return to My Bid Activity](#)
[Refresh]

SFS Handbook: Grantee Processing in SFS

Step	Action
9.	Additional search criteria can be entered to further narrow down your search results. In this example, we are not going to enter additional search criteria.

The screenshot shows the 'Event Activity' page. At the top, there is a navigation bar with a search icon and a search bar containing 'Search in Menu'. Below the navigation bar, the page title 'Event Activity' is displayed. A welcome message reads 'Welcome, [redacted] User: John Doe'. The 'Event Activity Summary' section shows 'Events Invited To: 2', 'Events Bid On: 4', and 'Events Awarded: 0'. The 'Search Criteria' section is expanded, showing options for 'Event Format', 'Event Type', 'Date Range' (From 04/15/2024 to 04/19/2024), and radio buttons for 'Events Invited To', 'Events Bid On' (selected), and 'Events Awarded'. There are also input fields for '*Business Unit', 'Event ID', and 'Event Name'. A 'Search' button is highlighted with a green box. Below the search criteria, there is a 'Legend' section with a link 'Return to My Bid Activity' and a 'Refresh' button.

Step	Action
10.	Click the Search button.

SFS Handbook: Grantee Processing in SFS

The screenshot displays the 'Event Activity' interface. At the top, there is a navigation bar with a search menu. Below it, a welcome message identifies the user as John Doe. A summary section shows 'Events Invited To: 2', 'Events Bid On: 4', and 'Events Awarded: 0'. The 'Search Criteria' section includes filters for Event Format, Event Type, Date Range (From 04/15/2024 to Through 04/19/2024), Business Unit, Event ID, and Event Name. A 'Legend' section is also present. The main 'Events' table lists four events with details on ID, Format, Name, Status, and Dates. A 'Refresh' button is located at the bottom left of the interface.

Step	Action
11.	The list of bid events that we have submitted a response for, within our identified date range, is displayed in the search results.

SFS Handbook: Grantee Processing in SFS

Welcome,
 User: John Doe

Event Activity Summary

Click on number to view events below

Events Invited To: 2 Events Bid On: 4 Events Awarded: 0

Search Criteria

Event Format: [Dropdown] Events Invited To Events Bid On Events Awarded

Event Type: [Dropdown] Date Range: From 04/15/2024 [Calendar] Through 04/19/2024 [Calendar]

 *Business Unit: [Input] [Search] Event ID: [Input] [Search] Event Name: [Input]

Legend

Events [Search] | [Filter] [Page: 1 of 4]

Event ID	Format	Event Name	Event Status	Start Date	End Date	Status
OMH01-EVT0000001	Sell	Outpatient Treatment Programs for Adolescents	Pending Award	04/17/2024 2:01PM EDT	04/26/2024 10:30AM EDT	Accepted
▶ OMH01-EVT0000002	Sell	Outpatient Treatment Programs for Adolescents	Pending Award	04/18/2024 9:56AM EDT	04/29/2024 8:15AM EDT	Accepted
▶ OMH01-EVT0000003	Sell	Outpatient Treatment Programs for Adolescents	Pending Award	04/19/2024 9:18AM EDT	04/29/2024 9:55AM EDT	Accepted
▶ OMH01-EVT0000004	Sell	Outpatient Treatment Programs for Adolescents	Collaborating Bid Analysis	04/19/2024 1:54PM EDT	04/29/2024 8:35AM EDT	Accepted

[Return to My Bid Activity](#)

Step	Action
12.	Click the Arrow icon next to one of the Event IDs to view additional information regarding the bid response for the specific event.

SFS Handbook: Grantee Processing in SFS

Event Activity

Event Activity Summary

Click on number to view events below

Events Invited To: 2 Events Bid On: 4 Events Awarded: 0

Search Criteria

Event Format: Events Invited To Events Bid On Events Awarded

Event Type: Date Range: From 04/15/2024 Through 04/19/2024

Search *Business Unit: Event ID: Event Name:

> Legend

Events

Event ID	Format	Event Name	Event Status	Start Date	End Date	Status
OMH01-EVT0000001	Sell	Outpatient Treatment Programs for Adolescents	Pending Award	04/17/2024 2:01PM EDT	04/26/2024 10:30AM EDT	Accepted

Bid Summary

Bid ID	Round	Event Version	Status	Date Time Posted	Currency Code	Total Bid Amount
1	1	1	Posted	04/18/2024 9:48:29AM EDT	USD	10,000.00000

▶ OMH01-EVT0000002 Sell Outpatient Treatment Programs for Adolescents Pending Award 04/18/2024 9:56AM EDT 04/29/2024 8:15AM EDT Accepted
 ▶ OMH01-EVT0000003 Sell Outpatient Treatment Programs for Adolescents Pending Award 04/19/2024 9:18AM EDT 04/29/2024 9:55AM EDT Accepted
 ▶ OMH01-EVT0000004 Sell Outpatient Treatment Programs for Adolescents Collaborating Bid Analysis 04/19/2024 1:54PM EDT 04/29/2024 8:35AM EDT Accepted

Step	Action
13.	<p>Notes:</p> <ul style="list-style-type: none"> In the Bid Summary section, a Status of Posted means that the bid response was submitted. The date and time the bid response was submitted can be found in the Date Time Posted field.

SFS Handbook: Grantee Processing in SFS

Event Activity

Event Activity Summary

Click on number to view events below

Events Invited To: 2 Events Bid On: 4 Events Awarded: 0

Search Criteria

Event Format: Events Invited To Events Bid On Events Awarded

Event Type: Date Range: From 04/15/2024 Through 04/19/2024


Search *Business Unit: Event ID: Event Name:

> Legend

Events

Event ID	Format	Event Name	Event Status	Start Date	End Date	Status
OMH01-EVT0000001	Sell	Outpatient Treatment Programs for Adolescents	Pending Award	04/17/2024 2:01PM EDT	04/26/2024 10:30AM EDT	Accepted

Bid Summary

Bid ID	Round	Event Version	Status	Date Time Posted	Currency Code	Total Bid Amount	
1	1	1	Posted	04/18/2024 9:48:29AM EDT	USD	10,000.00000	

[▶ OMH01-EVT0000002](#) Sell Outpatient Treatment Programs for Adolescents Pending Award 04/18/2024 9:56AM EDT 04/29/2024 8:15AM EDT Accepted
[▶ OMH01-EVT0000003](#) Sell Outpatient Treatment Programs for Adolescents Pending Award 04/19/2024 9:18AM EDT 04/29/2024 9:55AM EDT Accepted
[▶ OMH01-EVT0000004](#) Sell Outpatient Treatment Programs for Adolescents Collaborating Bid Analysis 04/19/2024 1:54PM EDT 04/29/2024 8:35AM EDT Accepted

Step	Action
14.	To view the response that was provided to the bid, click the View Details icon.

SFS Handbook: Grantee Processing in SFS

The screenshot shows the 'Event Activity' page in SFS. At the top, there is a search bar and a 'Search in Menu' button. Below the header, there are navigation buttons: 'Submit Bid', 'Save for Later', 'Cancel', and 'Validate Entries'. The main content area displays event details for 'Outpatient Treatment Programs for Adolescents'. A modal message box is overlaid on the page, containing the text: 'Please see message(s) at the top of the page. (18058,314)' and an 'OK' button. The event details include: Event ID: OMH01-EVT0000001, Event Format/Type: Sell Event, Event Round: 1, Event Start Date: 04/17/2024 2:01PM EDT, and Processing Status: Awarded. There is also a 'Description' section with a scrollable text area and a 'Payment Terms' section with a table of details.

Step	Action
15.	<p>Upon clicking the View Details icon, you may receive a message advising you to review the message(s) at the top of the page.</p> <p>Click the OK button.</p>

SFS Handbook: Grantee Processing in SFS

The screenshot shows the 'Event Activity' page for 'Outpatient Treatment Programs for Adolescents'. A red notification box at the top left contains the following text: 'Event Completed. You are not allowed to enter a bid after events completion', 'Bid Posted. No more changes allowed', and 'You are authorized to view this event Only. Status: Pending Award'. Below the notification are buttons for 'Submit Bid', 'Save for Later', 'Cancel', and 'Validate Entries'. The event details section shows: Event Name: Outpatient Treatment Programs for Adolescents, Event ID: OMH01-EVT0000001, Bid ID: 1, Bid Date: 04/18/2024 9:48:29AM EDT, Bid Currency: USD (US Dollar), Event Start Date: 04/17/2024 2:01PM EDT, Event End Date: Pending Award, and Processing Status: Awarded. A description box contains text about the New York State Agency's commitment to reducing inpatient hospitalizations and details about the RFP for three outpatient programs. Contact information for DOE, JOHN is provided, along with payment terms and other event details.

Step	Action
16.	<p>In this example, the messages at the top of the page indicate that:</p> <ul style="list-style-type: none"> • Event Completed: This means that the Event End Date has passed, and applications can no longer be submitted. • Bid Posted: This means that your bid response has been submitted to the agency for review. • You are authorized to view this event only: This means that changes can no longer be made to your bid response.

SFS Handbook: Grantee Processing in SFS

The screenshot shows the 'Event Activity' page in the SFS system. At the top, there is a navigation bar with a search menu and a user greeting: 'Welcome, [redacted] User: John Doe'. Below this, there are three red warning messages: 'Event Completed. You are not allowed to enter a bid after events completion.', 'Bid Posted. No more changes allowed', and 'You are authorized to view this event Only. Status: Pending Award'. A row of buttons includes 'Submit Bid', 'Save for Later', 'Cancel', and 'Validate Entries'. The main content area displays event details for 'Outpatient Treatment Programs for Adolescents' (Event ID: OMH01-EVT0000001, Bid ID: 1). A 'Bid Response PDF' link is highlighted with a green box. Below the details is a 'Description' section with a scrollable text area containing information about the RFP for three outpatient programs. At the bottom, contact information for 'DOE, JOHN' and various payment terms are listed.

Step	Action
17.	You can select the Bid Response PDF link to view the responses to the bid in a PDF format or use the scrollbar to scroll down and view the responses that were entered for this bid.

SFS Handbook: Grantee Processing in SFS

Event Details

Response We serve a wide variety of individuals with various characteristics and needs. Below are some of the current characteristics of population to be served: Youth aging out of foster care, Youth aging out of long-term residential treatment facilities, and adolescents who are homeless or

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 1
 Your Total Line Pricing 10,000.0000 USD

[Hide Line Detail](#)

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

Lines

Line	Period	Item ID	Description	Unit	Your Unit Bid Price	Your Total Bid Price	
1	Period Details -1		Line 1	EA	10000.000000	10,000.0000 USD	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 Bidder Activity](#)

Step	Action
18.	To return to the Event Activity page, click the Return to Bidder Activity link at the bottom of the page.

SFS Handbook: Grantee Processing in SFS

Event Activity

Welcome,
User: John Doe

Event Activity Summary

Click on number to view events below

Events Invited To: 2 Events Bid On: 4 Events Awarded: 0

Search Criteria

Event Format Events Invited To Events Bid On Events Awarded

Event Type Date Range: From Through

 *Business Unit Event ID Event Name

> Legend

Step	Action
19.	You have successfully completed the View Submitted Bid Responses 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

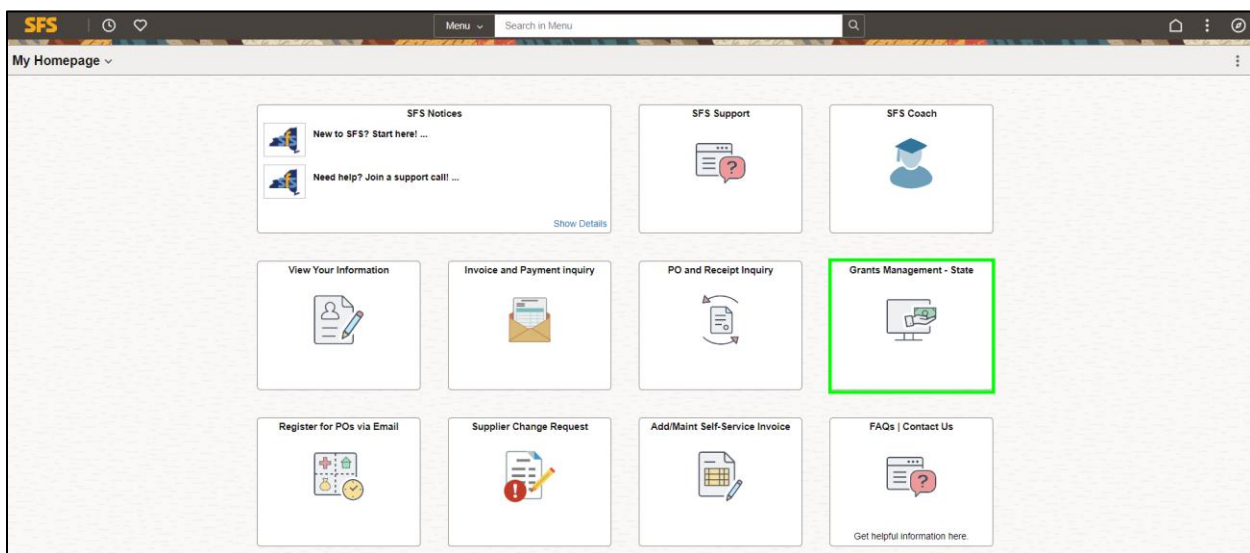
SFS role required to perform this task:

- Grants Contract Collaborator (NY_ES_SUPPLIER_CONTRACT_COLLAB)

Procedure

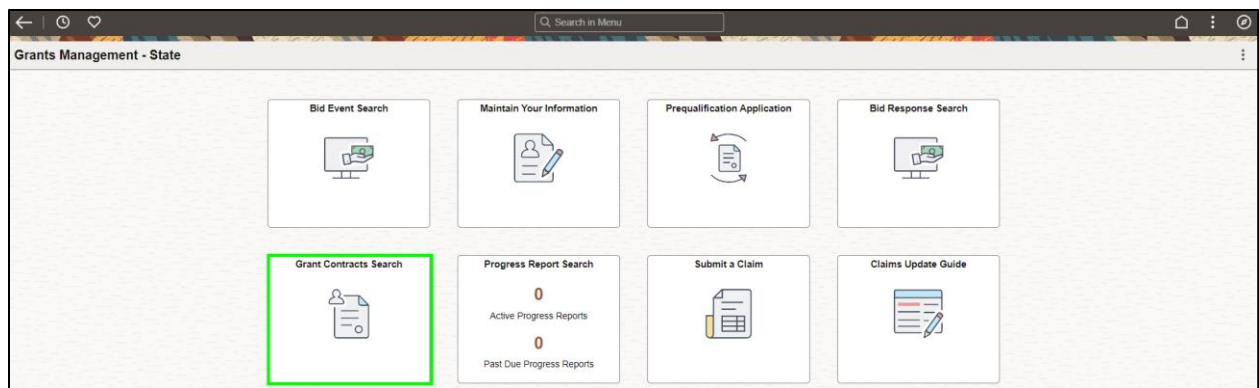
Scenario: You have been awarded a grant contract and would like to preview the grant contract before you take action on it. You will navigate to the Maintain Contract Documents page and click the View Document button.

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.

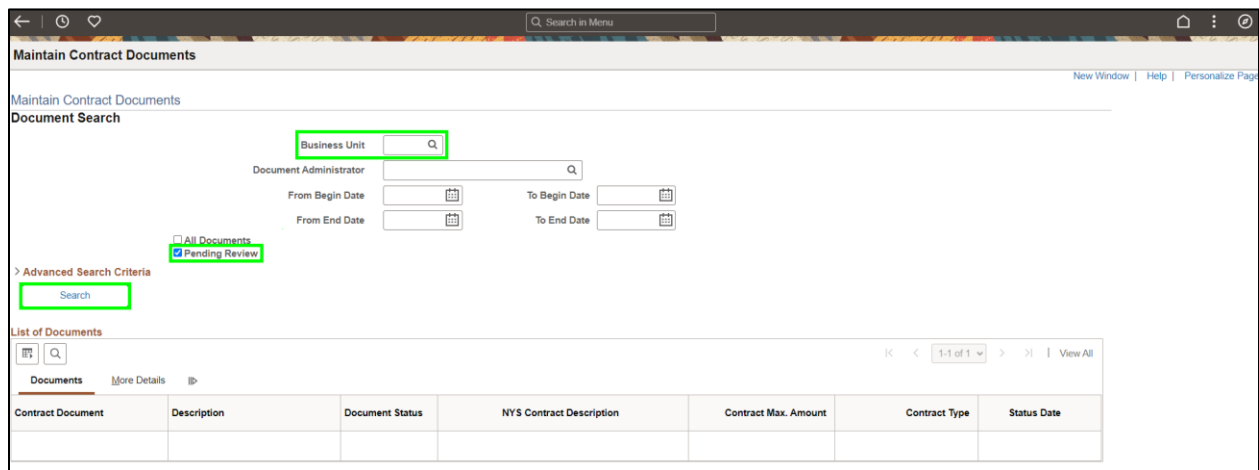



Step	Action
1.	<p>Preferred Navigation: Click the Grant Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > Manage Contracts > Maintain Contract Documents</p> <p>Note: You must log in to the SFS Vendor Portal to view a grant contract.</p>

SFS Handbook: Grantee Processing in SFS



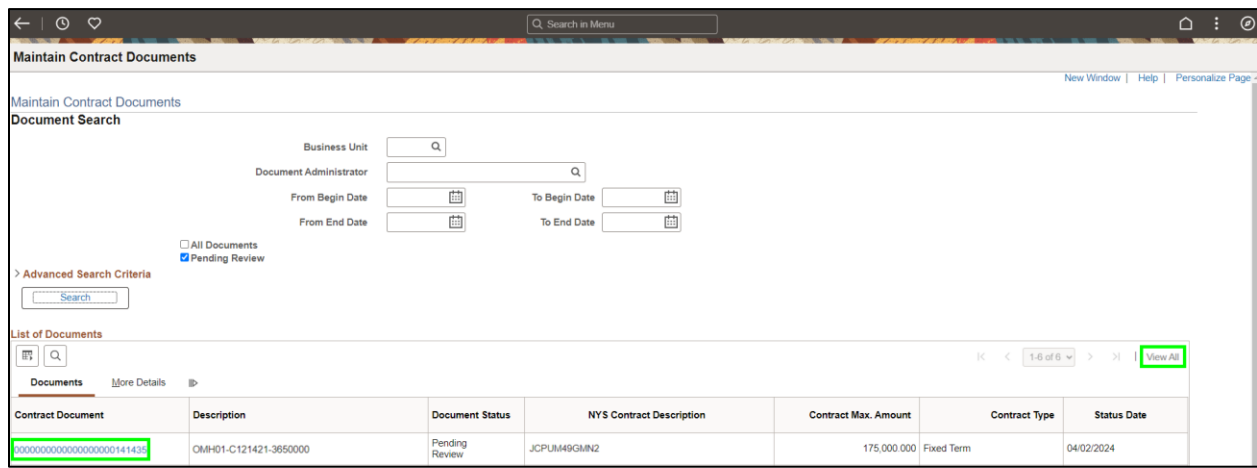
Step	Action
2.	Click the Grant Contracts Search tile.



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>

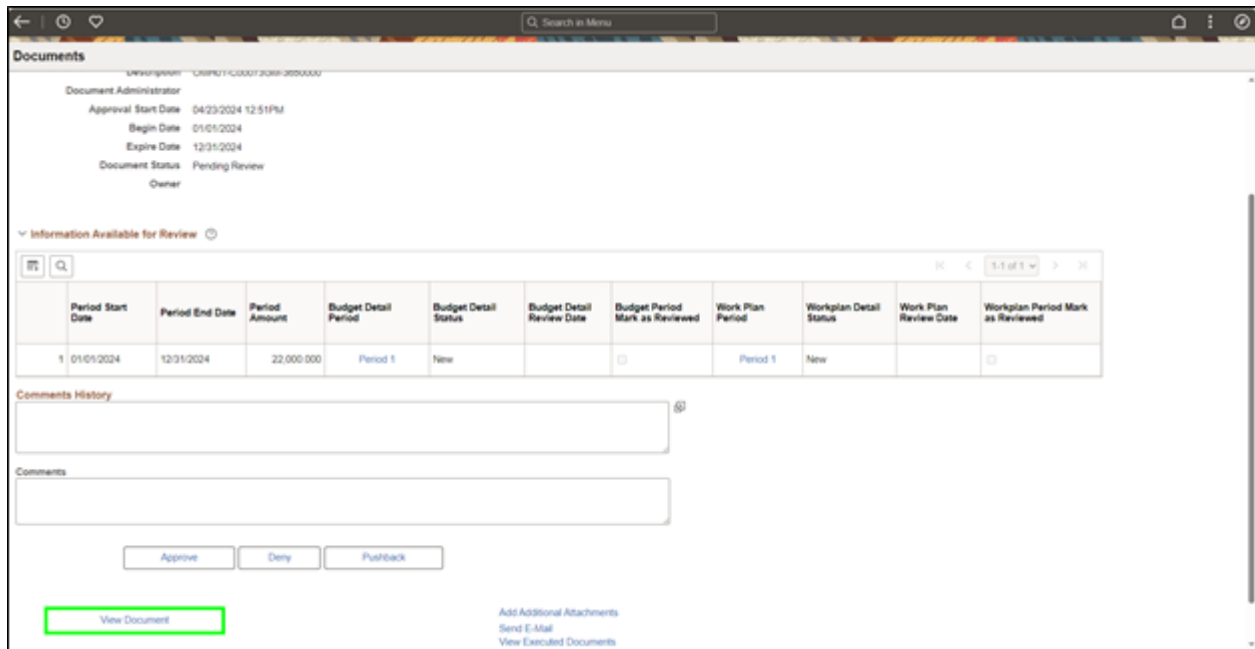
SFS Handbook: Grantee Processing in SFS

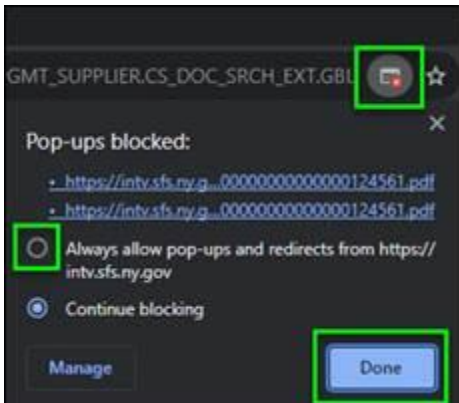
Step	Action
4.	Verify the Pending Review checkbox is selected. Note: To view grant contracts that are pending review and grant contracts that have previously been approved, verify the All Documents checkbox is selected.
5.	Click the Search button.



Step	Action
6.	Click the applicable Contract ID from the search results. If your organization has more than ten contract results, use the View All button to show all results on one page.


SFS Handbook: Grantee Processing in SFS



Step	Action
7.	Click the View Document button to review the Contract Agreement document.
Step	Action
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 Document button again to view the new browser window.</p> 

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
9.	When you are finished reviewing the Contract Agreement document, click the Close (X) button. 
10.	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:

SFS Handbook: Grantee Processing in SFS

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

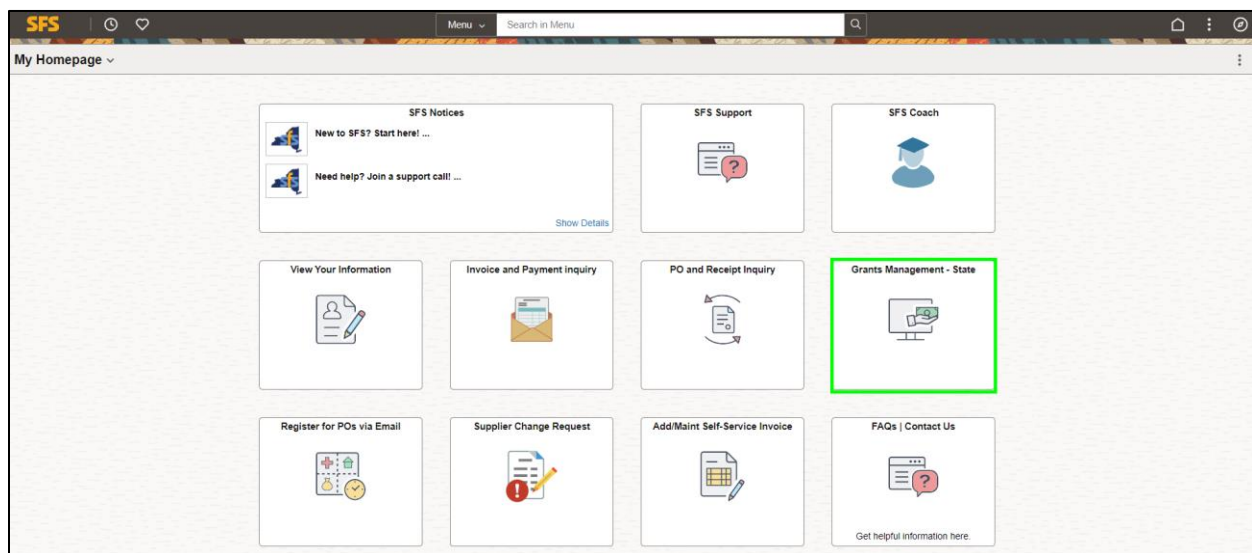
SFS role(s) required to perform this task:

- Grants Contracts Editor (NY_ES_VNDR_CNTRCT_CHANGE)
 - **Note:** This role allows you to make changes to a grant contract budget and work plan.
- Grants Contract Collaborator (NY_ES_SUPPLIER_CONTRACT_COLLAB)
 - **Note:** This role allows you to review and collaborate on a grant contract with the agency.

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.

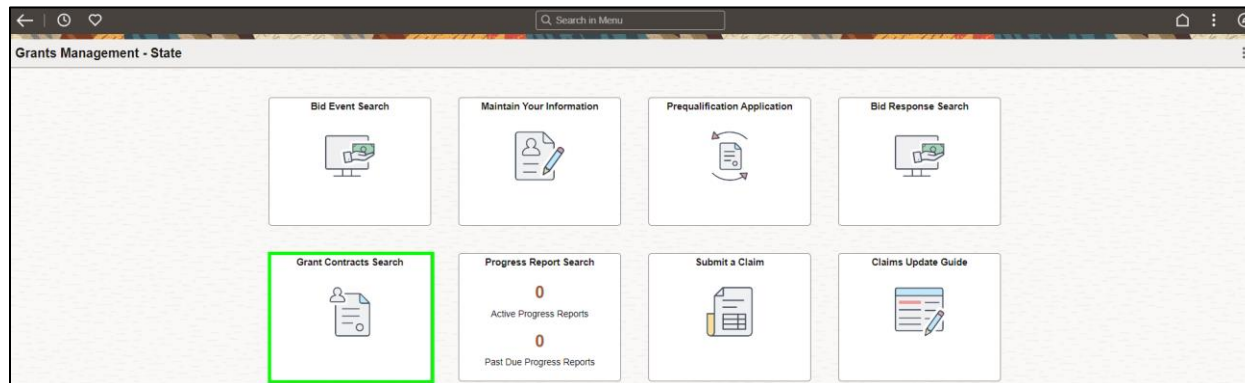
Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.



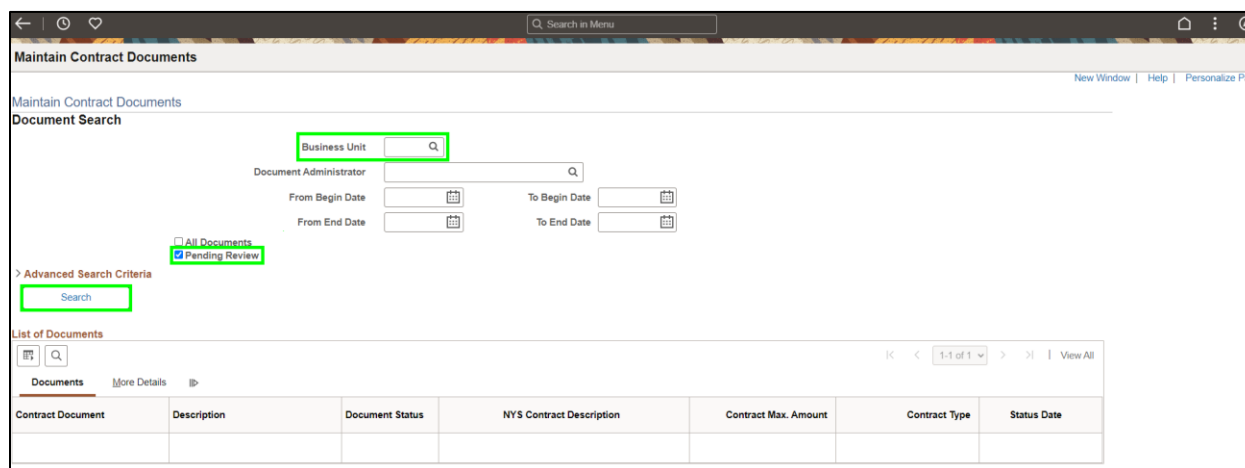
Step	Action
1.	<p>Preferred Navigation: Click the Grant Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > Manage Contracts > Maintain Contract Documents</p>


SFS Handbook: Grantee Processing in SFS

Step	Action
	Note: You must log in to the SFS Vendor Portal to update grant contract information.

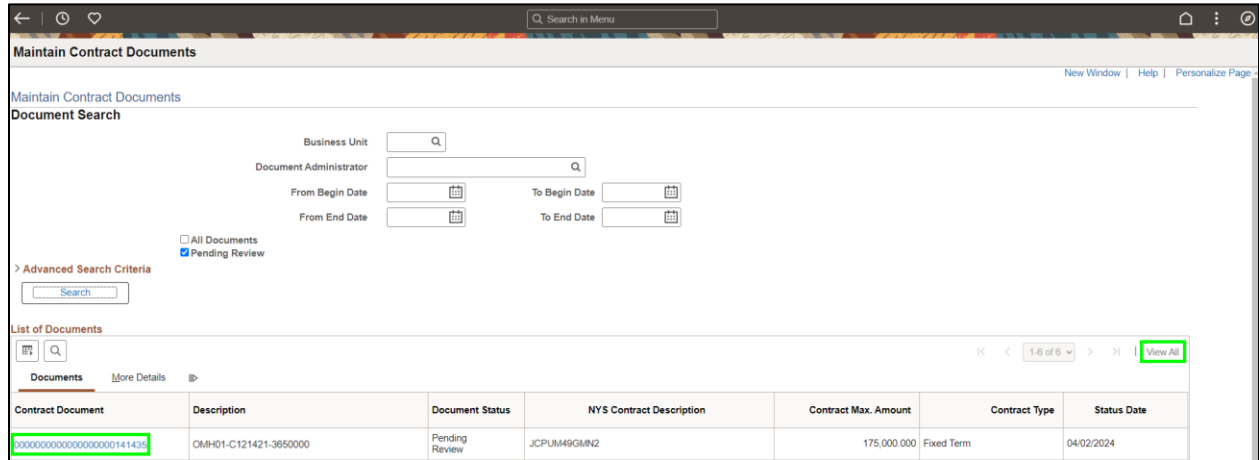


Step	Action
2.	Click the Grant Contracts Search tile.

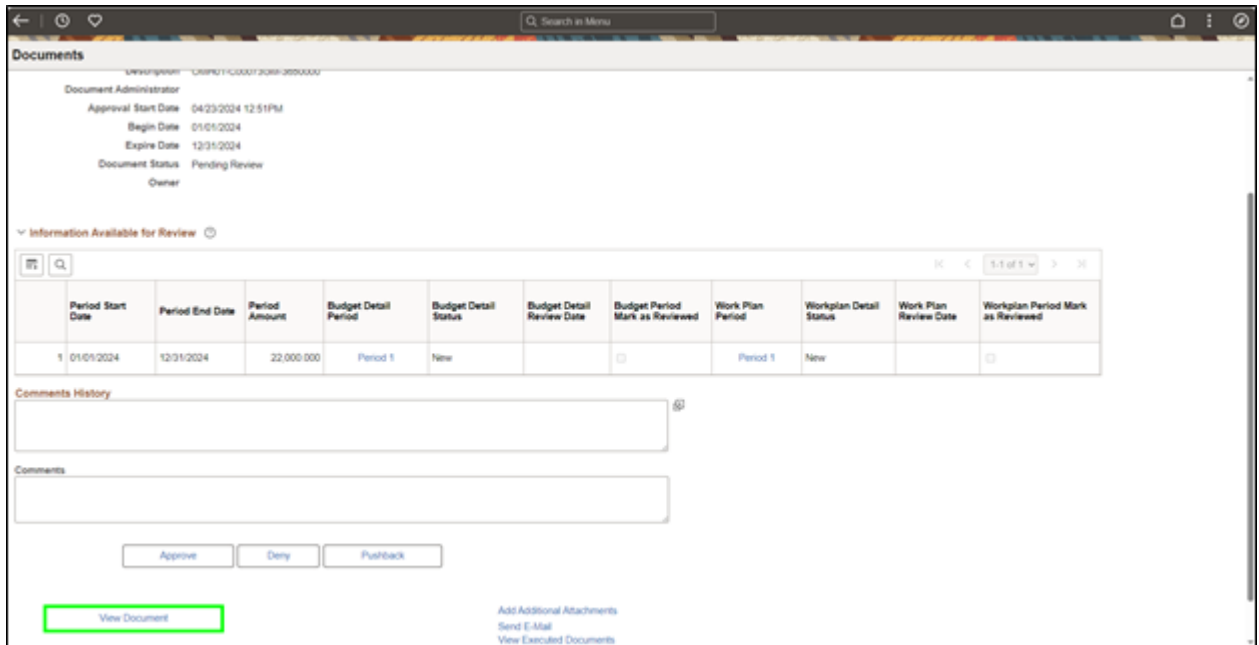


Step	Action
3.	Enter the agency's business unit into the Business Unit field or click the magnifying glass to search for the information. If you are unsure of the business unit for the State Agency you are doing business with, click the magnifying glass to view a list of business units and state agencies.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

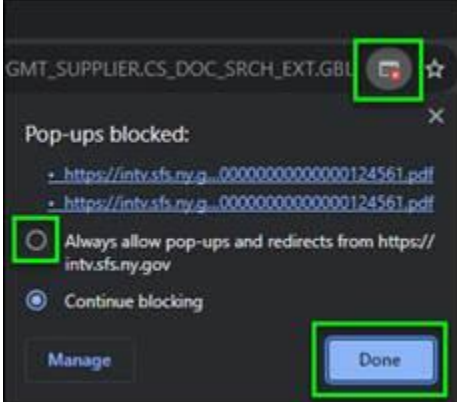
SFS Handbook: Grantee Processing in SFS



Step	Action
6.	<p>Click the applicable Contract ID link from the search results under the Contract Document column. If your organization has more than ten contract results, use the View All button to show all results on one page.</p> <p>Note: If your organization has multiple people assigned to the Grants Contract Collaborator role, please work within your organization to determine who is responsible for collaborating on each grant contract, as only one person can approve a specific grant contract during collaboration in SFS.</p>



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>
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 Document 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

Contract ID: 00000000000000000000000000000000141465
 Description: OMH01-C00073GM-3650000
 Document Administrator: [Name]
 Approval Start Date: 04/23/2024 12:51PM
 Begin Date: 01/01/2024
 Expire Date: 12/31/2024
 Document Status: Pending Review
 Owner: [Name]

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	01/01/2024	12/31/2024	22,000.000	Period 1	New		<input type="checkbox"/>	Period 1	New		<input type="checkbox"/>

Comments History

Comments

Approve Deny Pushback

View Document

Add Additional Attachments
 Send E-Mail
 View Executed Documents

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

Contract Period Budget

Copy from Contract Period

Available for Supplier Updates

Contract SetID: SHARE
 Contract ID: 00000000000000000000000000000000141465
 Version #: 1
 Budget Type: EXPENDITURE

Contract Period: 1
 Period From Date: 01/01/2024
 Period To Date: 12/31/2024
 Period Amount: 22,000.00

Budget Properties

Apply Match: Not Allowed
 Calculate Match:
 Include Match Worksheet
 Allow Supplier to Add Deliverable/Outcome Rows
 Use Match
 Match %: 0.00

Budget Category Properties

	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"/>	











SFS Handbook: Grantee Processing in SFS

Step	Action
12.	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.
13.	Review Budget Category Property section (including Narrative), noting which rows have Available in Grant checked. Note: Grantees will only be able to update the budget categories that have Available in Grant selected. Grantees will need to scroll down to the Period Budget Summary section to make updates to the available budget categories.

Contract Period Budget

▼ **Period Budget Summary**

< > 1-10 of 10 > | View All

	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
14.	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. Note: The Category Detail fields will vary based on the Budget Category.

SFS Handbook: Grantee Processing in SFS

Category Details x

[Help](#)

Contract ID 0000000000000000000141465	Contract Version 1
Budget Type EXPENDITURE	Contract Period 1
Budget Category FRINGE	Match % Required
	Match Worksheet

Category Details

1-1 of 1 View All

	Type/Description	Grant Funds	Match Funds	Match %	Other Funds	Total Funds		
1	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>				<input style="width: 90%;" 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
15.	In this example, we are updating budget category detail information for the Fringe budget category and Expenditure budget type.
16.	<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>
17.	<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>
18.	<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.
19.	When you are finished entering the Budget Category Detail information, click the OK button.

SFS Handbook: Grantee Processing in SFS

Contract Period Budget

▼ Period Budget Summary

⌵ 🔍
⏪ < 1-10 of 10 > ⏩ | View All

#	Budget Category	Grant Funds Requested	Match Funds	Match Funds Calculated	Match % Calculated	Match % Required	Other Funds	Total	Category Details
1	SALARY								⌵
2	FRINGE	22,000.00						22,000.00	⌵
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 22,000.00

Total Match Funds 0.00

Total Other Funds 0.00

Grand Total 22,000.00

OK
Cancel
Apply

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

Documents

Contract ID: 0000000000000000000000141465
 Description: OM-H01-C00073GM-3660000
 Document Administrator: [Name]
 Approval Start Date: 04/23/2024 12:51PM
 Begin Date: 01/01/2024
 Expire Date: 12/31/2024
 Document Status: Pending Review
 Owner: [Name]

▼ Information Available for Review ⓘ

⌵ 🔍
⏪ < 1-1 of 1 > ⏩

#	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	01/01/2024	12/31/2024	22,000.000	Period 1	In Process		<input type="checkbox"/>	Period 1	New		<input type="checkbox"/>

Comments History

Comments

Approve
Deny
Pushback

SFS Handbook: Grantee Processing in SFS

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

Grants Work Plan

Contract Work Plan

Work Plan Header

Available for Supplier Updates:

Contract ID: 00000000000000000000141465

Contract Period: 1

Allow Supplier Defined Objective & Tasks:

Maximum Number of:

Objectives:

Tasks:

Performance Measures:

Supplier:

SetID: SHARE Contract Version: 1 Work Plan ID: 00000000000000000000141465-SHAREV1P1

From: 01/01/2024 To: 12/31/2024

Online Work Plan Required:

[Work Plan Overview](#)

[Work Plan Overview Report](#)

[Copy from Existing Work Plan](#)

Project Summary

Paragraph

Help reduce drug deaths.

Objectives >> Tasks >> Performance Measures

+ Objective + Task + Perf. Measure

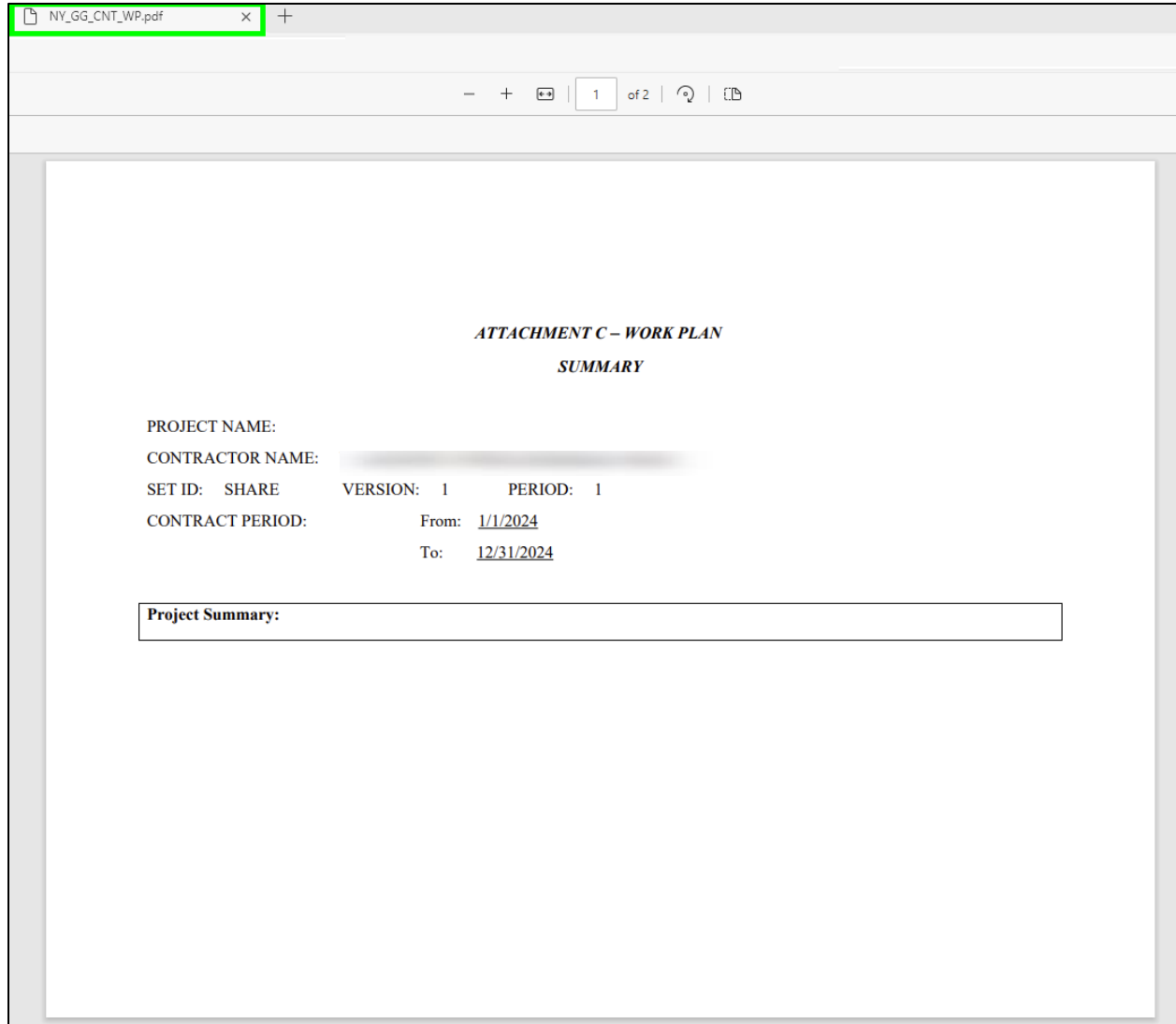
Display Type: All

Select	Type	Sort Order	Name	Description	Required	Allowed to Sort
<input checked="" type="checkbox"/>	Objective	1	Reduce Opioid related deaths	Reduce Opioid related deaths	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Task	1.1	Educate community members on correct use of Narcan	Educate community members on correct use of Narcan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance Measure	1.1.1	Number of community members trained	Number of community members trained	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Step	Action
23.	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.
24.	<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>

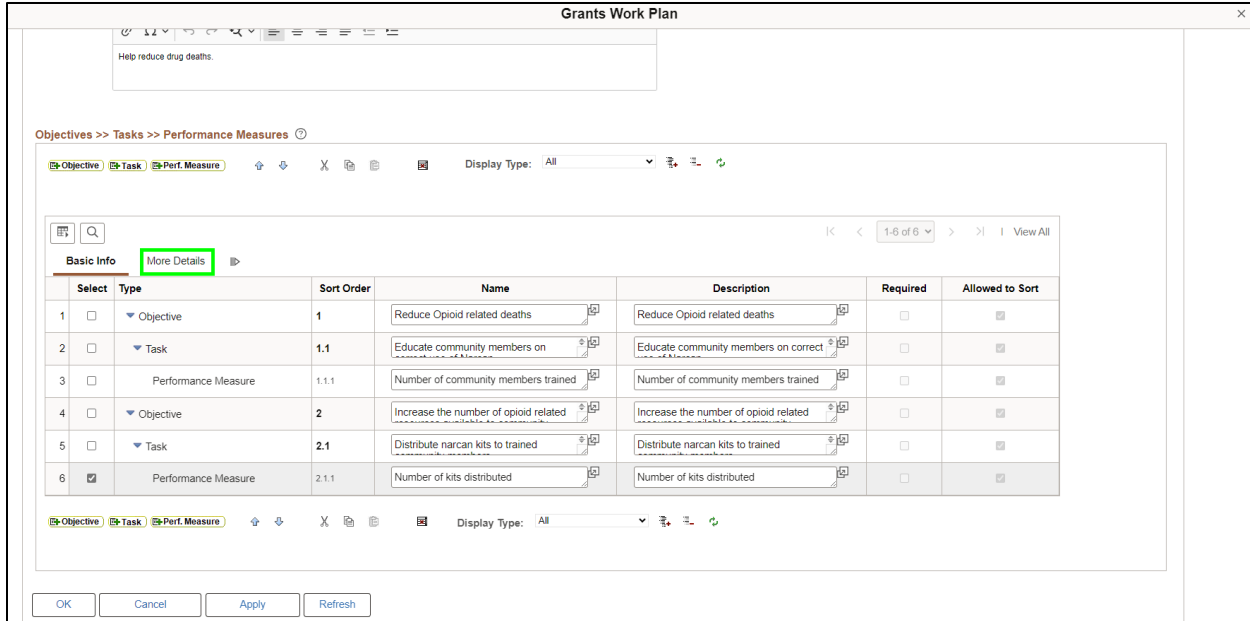
SFS Handbook: Grantee Processing in SFS

Step	Action
25.	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. Note: This is an optional step.

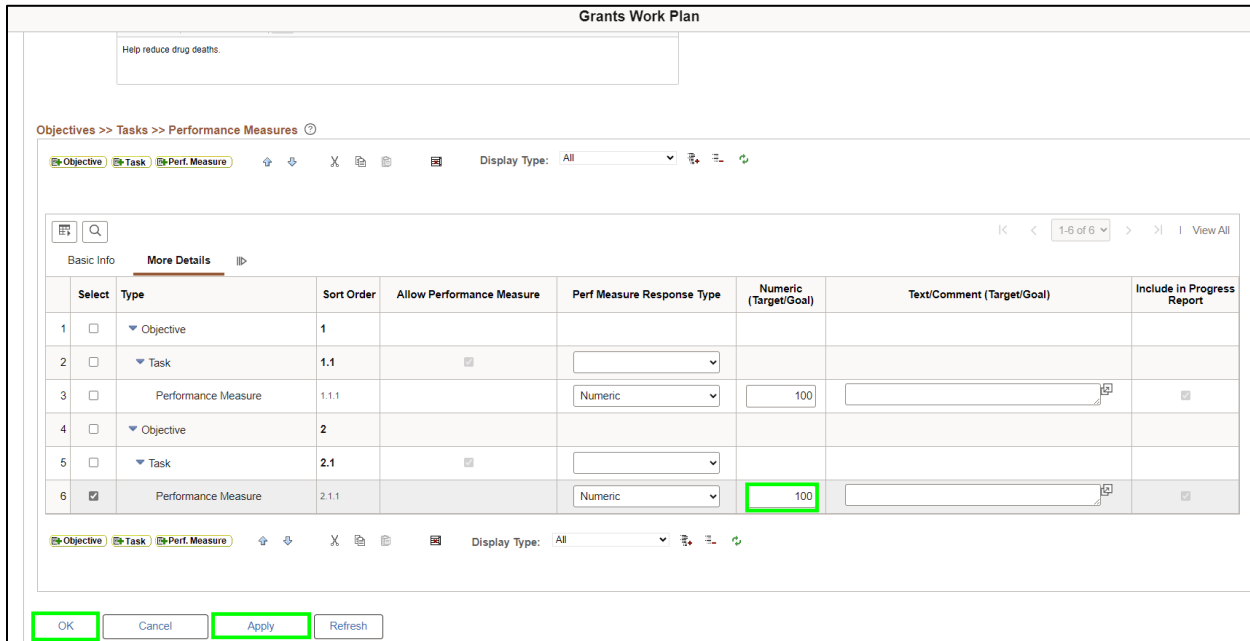


Step	Action
26.	When you are finished reviewing the Work Plan Overview Report document, click the Close (X) button.

SFS Handbook: Grantee Processing in SFS



Step	Action
27.	Click the More Details tab.



Step	Action
28.	In this example, we are updating the target value for the second performance measure. We will change the Numeric (Target/Goal) field to 50 .

SFS Handbook: Grantee Processing in SFS

Step	Action
29.	Click the Apply button to save any changes.
30.	Click the OK button to return to the Document Management page.

Documents

Description: OKMH01-C00073GM-3650000
 Document Administrator
 Approval Start Date: 04/23/2024 12:51PM
 Begin Date: 01/01/2024
 Expire Date: 12/31/2024
 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 01/01/2024	12/31/2024	22,000,000	Period 1	In Process		<input checked="" type="checkbox"/>	Period 1	In Process		<input checked="" type="checkbox"/>

Comments History

Comments

Approve Deny Pushback

View Document Add Additional Attachments Send E-Mail View Executed Documents

Step	Action
31.	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.
32.	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.
33.	Enter any comments for the agency in the Comments field. Note: The Comments field could be used to summarize the changes you made.
34.	Note: <ul style="list-style-type: none"> To upload and attach documents to a contract, click the Add Additional Attachments link. Vendors can only add attachments to their contracts during collaboration.
35.	Click the Approve button to indicate your review is complete and to return the contract to the agency.

SFS Handbook: Grantee Processing in SFS

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.

Step	Action
36.	Click the Yes button to continue marking this contract as reviewed. Note: Click the No button to cancel this action.
37.	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.
38.	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

SFS role required to perform this task:

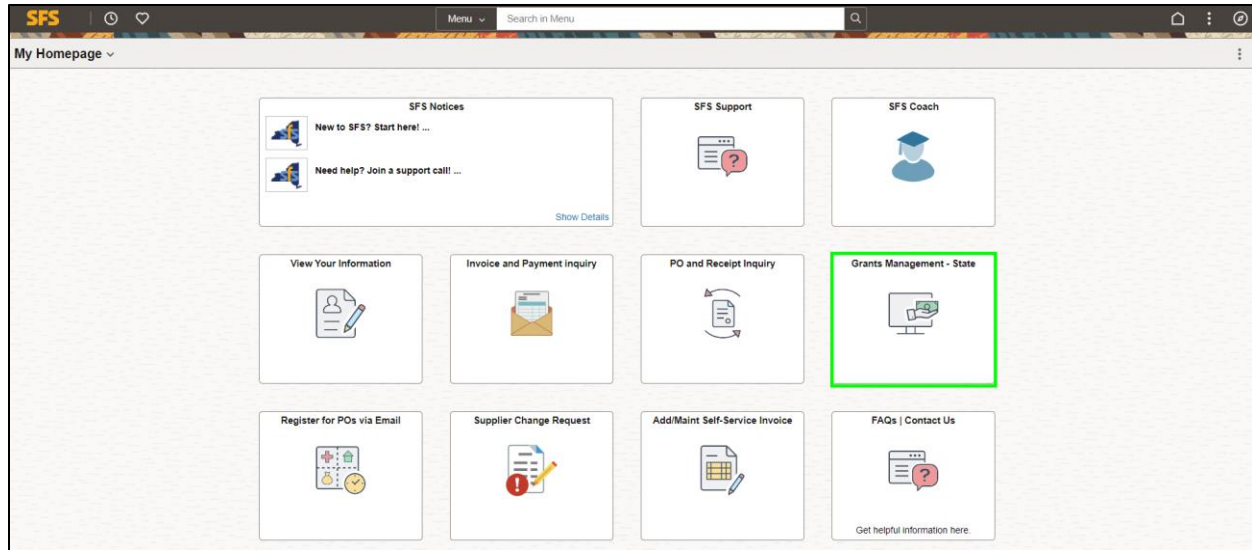
- Grants Contract Approver (NY_ES_SUPPLIER_CONTRACT_APPRVR)

Procedure

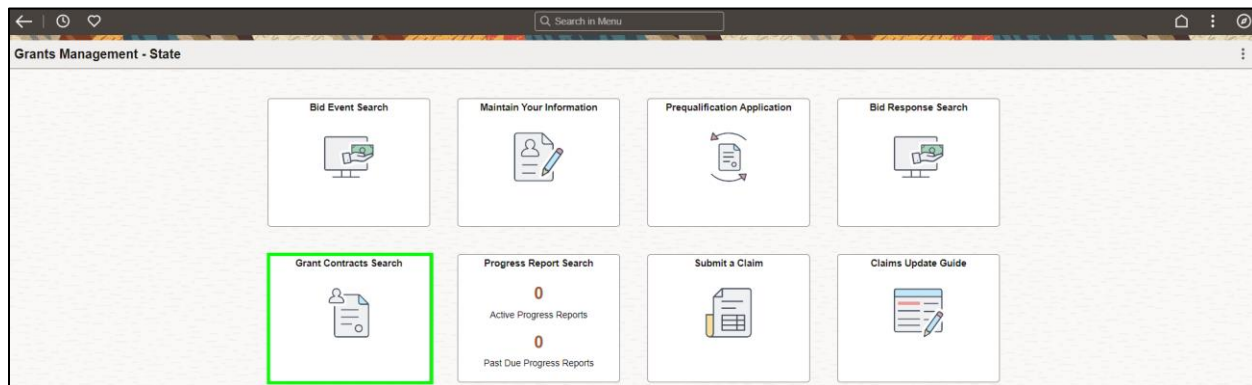
Scenario: You have been awarded a grant contract. You will view the contract agreement that is pending approval and then approve and sign the contract, so it routes to the agency for approval.

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

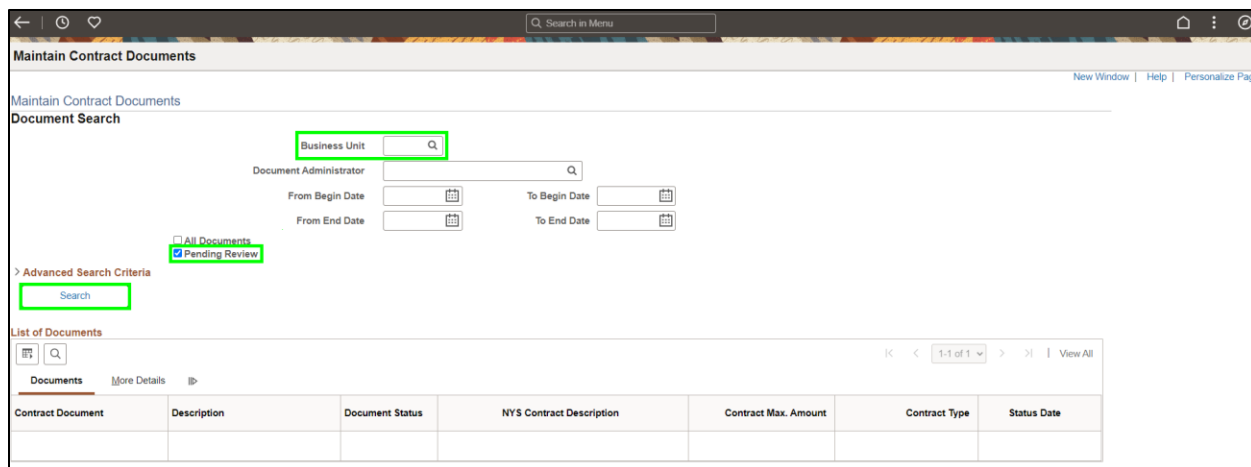




Step	Action
1.	<p>Preferred Navigation: Click the Grant Management – State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > Manage Contracts > Maintain Contract Documents</p> <p>Note: You must log in to the SFS Vendor Portal to approve a grant contract.</p>



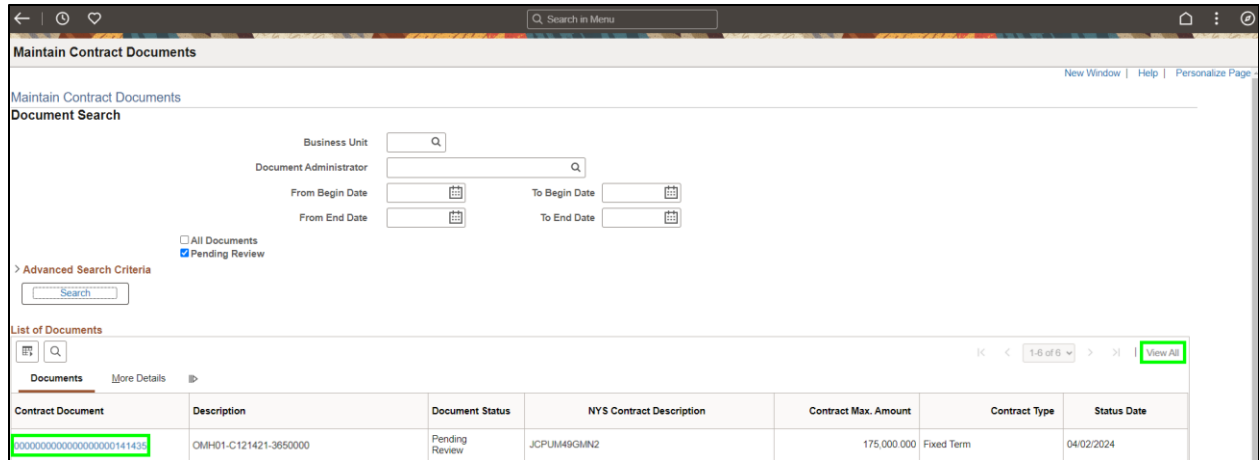
Step	Action
2.	Click the Grant Contracts Search tile.

SFS Handbook: Grantee Processing in SFS

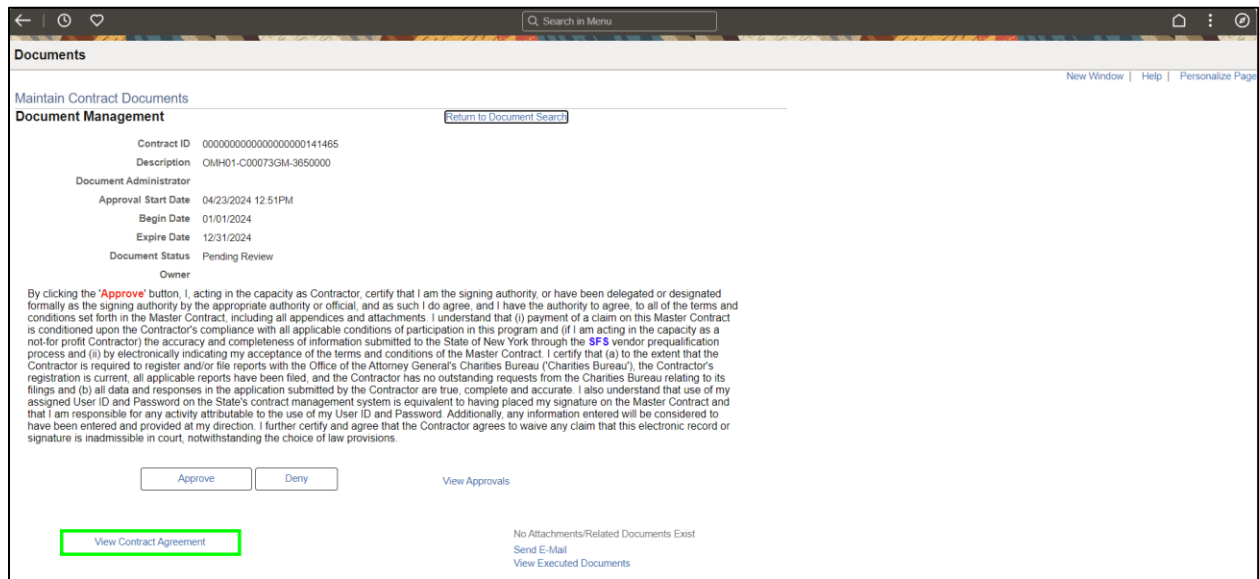


Step	Action
3.	<p>Enter the agency’s business unit into the Business Unit field or click the magnifying glass to search for the information.</p> <p>If you are unsure of the business unit for the State Agency you are doing business with, click the magnifying glass to view a list of business units and 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

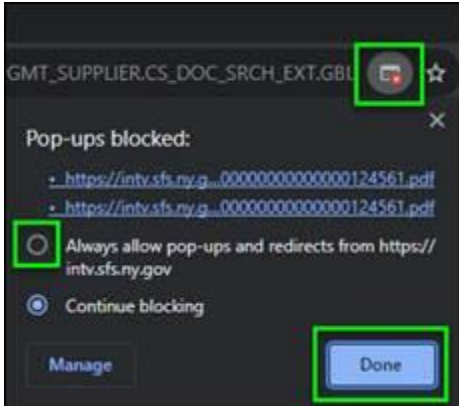


Step	Action
6.	<p>Click the applicable Contract ID from the search results. If your organization has more than ten contract results, use the View All button to show all results on one page.</p> <p>Note: If your organization has multiple people assigned to the Grants Contract Approver role, please work within your organization to determine who is responsible for approving each grant contract, as only one person can approve a specific grant contract in SFS.</p>




Step	Action
7.	Click the View Contract Agreement button to view the Contract Agreement in a new browser window.

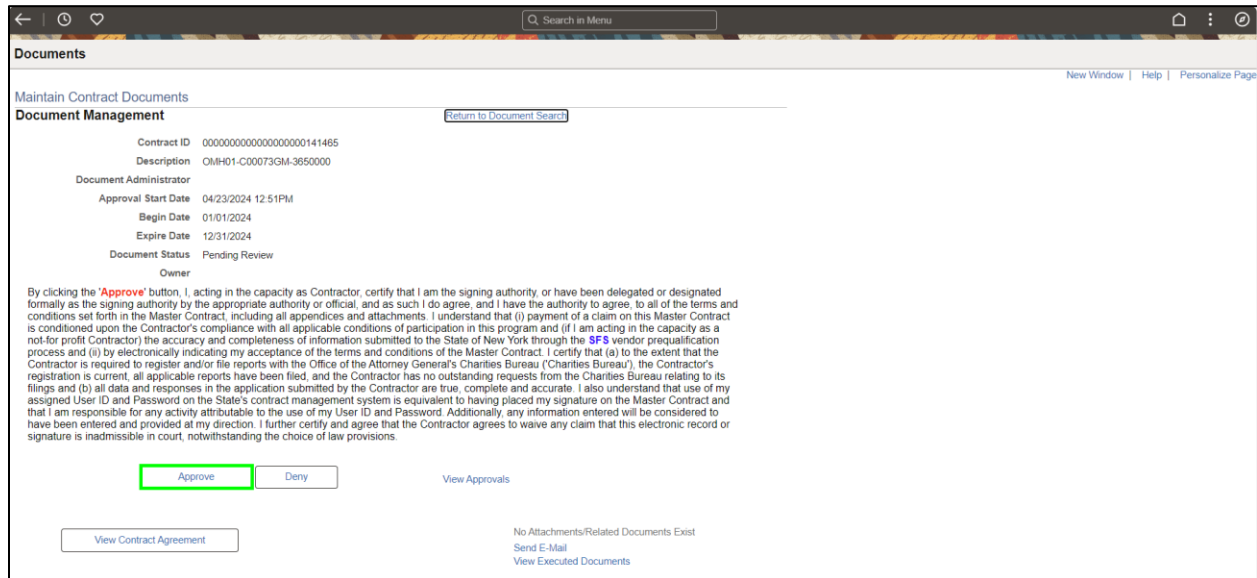
SFS Handbook: Grantee Processing in SFS

Step	Action
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> 

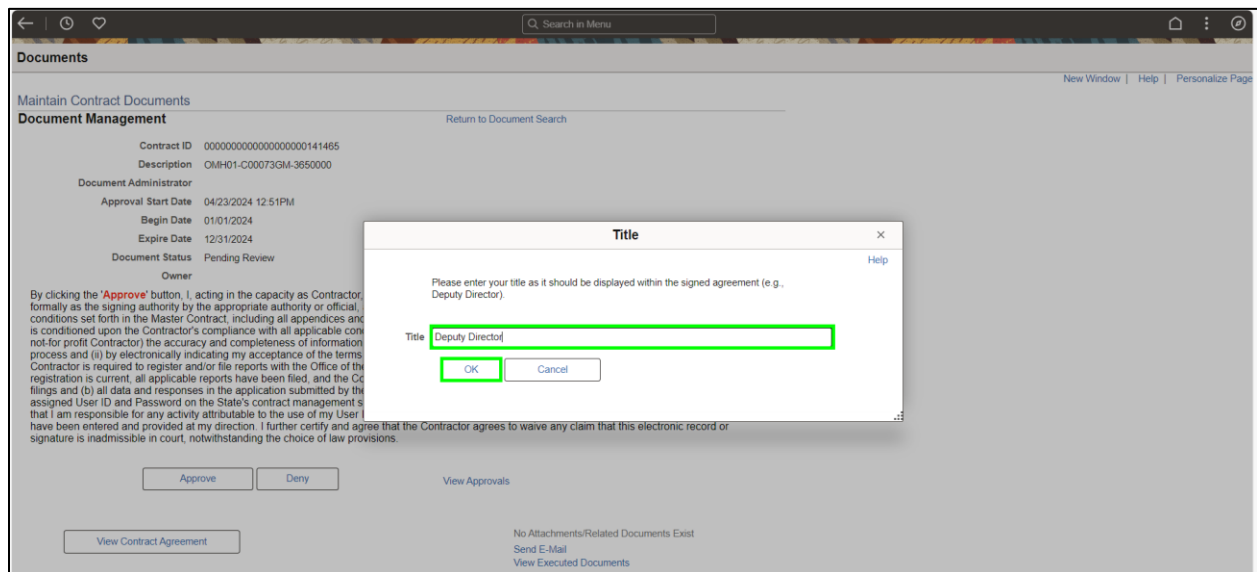
SFS Intranet - H: x SFS Intranet - H: x SFS Intranet - H: x Documents x AGREEMENT_00 x	
STATE OF NEW YORK MASTER CONTRACT FOR GRANTS FACE PAGE	
STATE AGENCY (Name & Address): Office of Mental Health 44 Holland Avenue Albany, NY 12229	BUSINESS UNIT/DEPT ID: OMH01 1100206 CONTRACT NUMBER: OMH01-00124GM-1100206 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

SFS Handbook: Grantee Processing in SFS

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

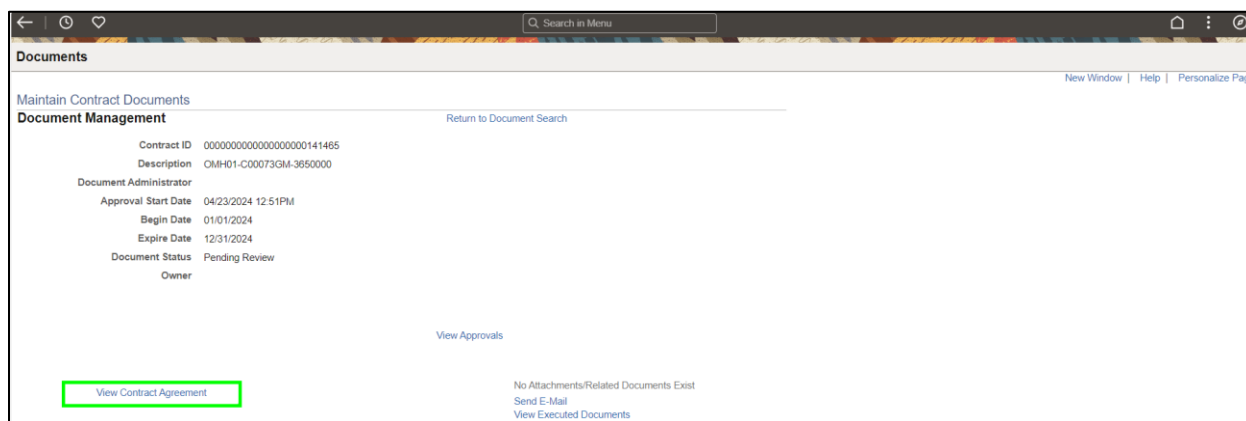


Step	Action
10.	Click the Approve button.

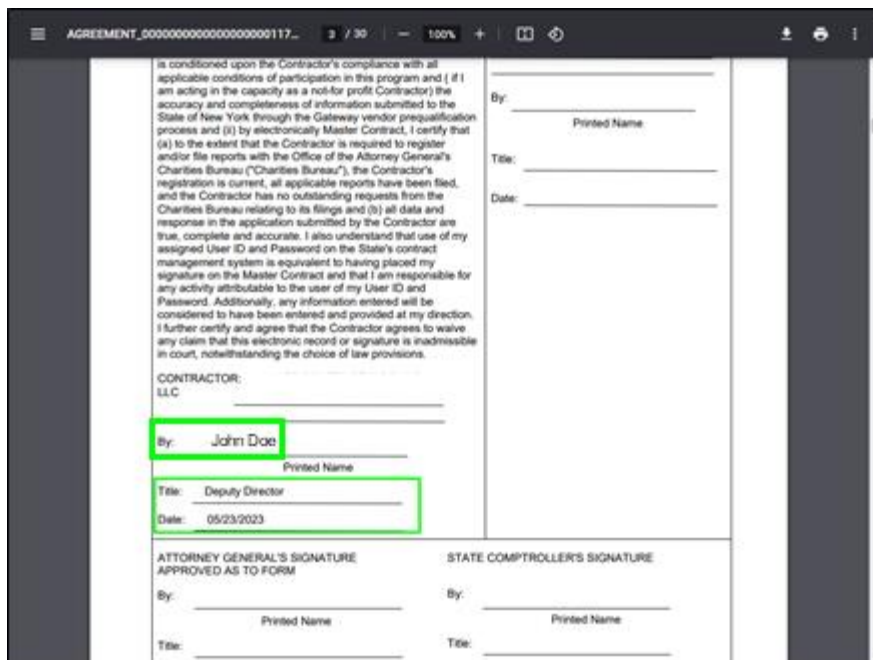


SFS Handbook: Grantee Processing in SFS

Step	Action
11.	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). 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.
12.	Click the OK button.



Step	Action
13.	Click the View Contract Agreement button.



SFS Handbook: Grantee Processing in SFS

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

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:
LLC

By: John Doe
Printed Name

Title: Deputy Director

Date: 05/23/2023

ATTORNEY GENERAL'S SIGNATURE APPROVED AS TO FORM

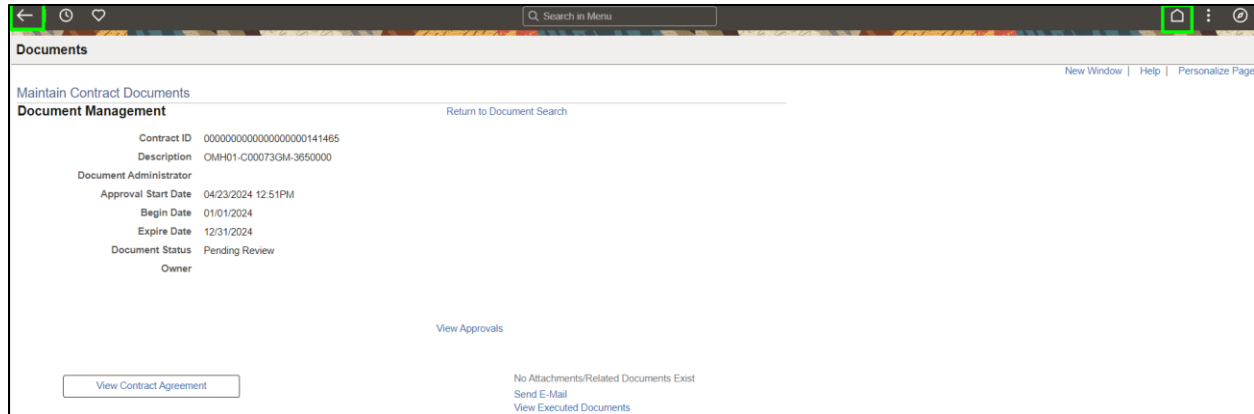
STATE COMPTROLLER'S SIGNATURE

By:

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



SFS Handbook: Grantee Processing in SFS



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

SFS role required to perform this task:

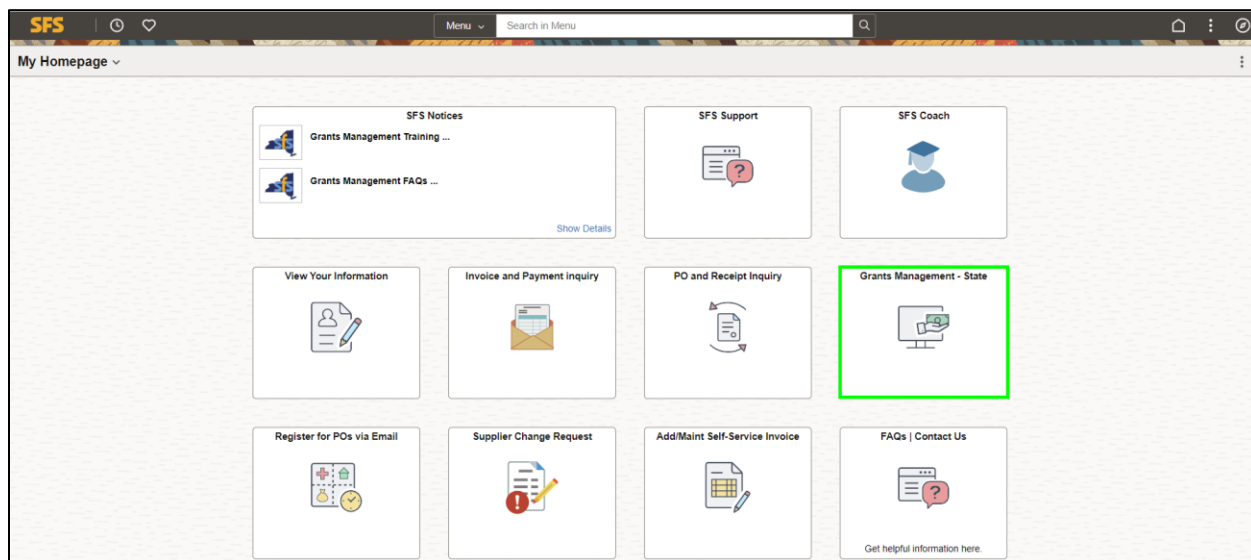
- Progress Report Processor (NY_ES_SUPPLIER_PRGRPT_USER)

Procedure

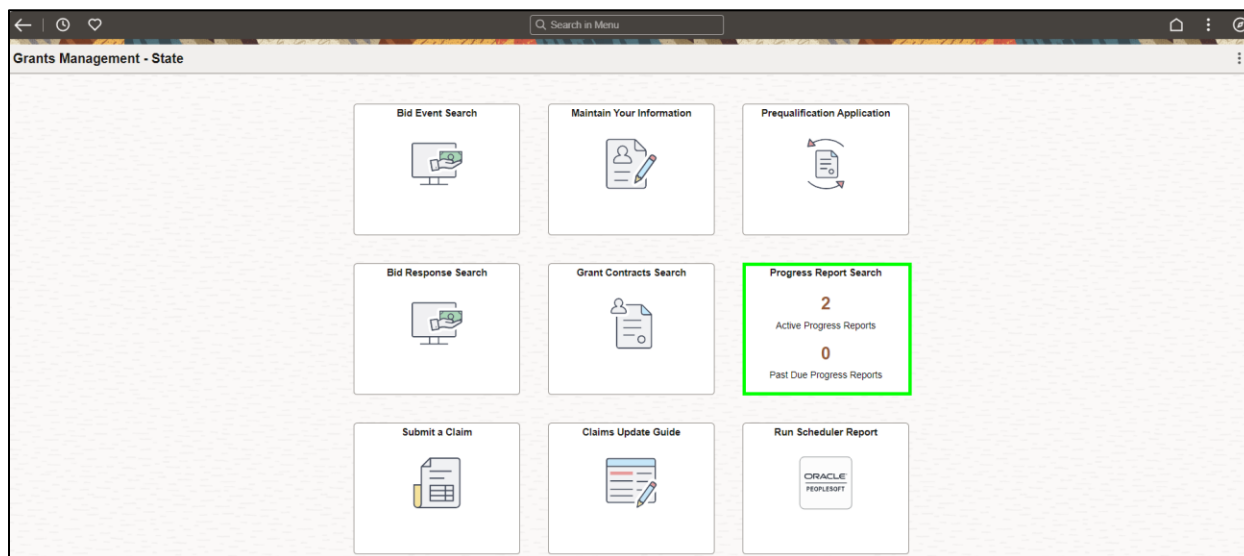
Scenario: Your grant contract has been approved and you are performing the work that is outlined in the contract agreement. As a Grantee User, it is time for you to complete performance measures on a progress report and then submit the progress report for agency review and approval.

SFS Handbook: Grantee Processing in SFS

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.

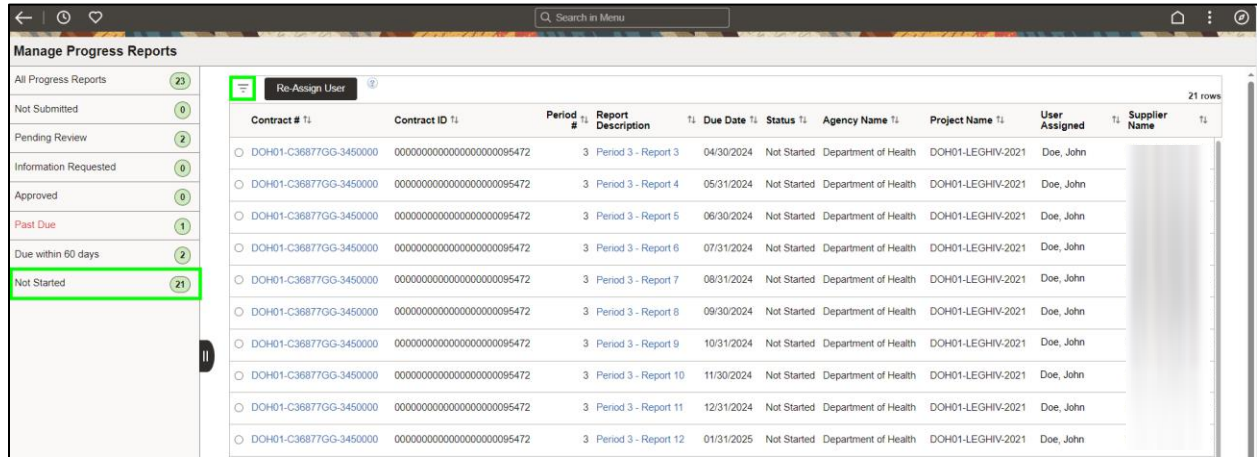



Step	Action
1.	<p>Preferred Navigation: Click the Grant Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > Manage Contracts > Manage Progress Reports</p> <p>Note: You must log in to the SFS Vendor Portal to submit a progress report.</p>



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 🔍

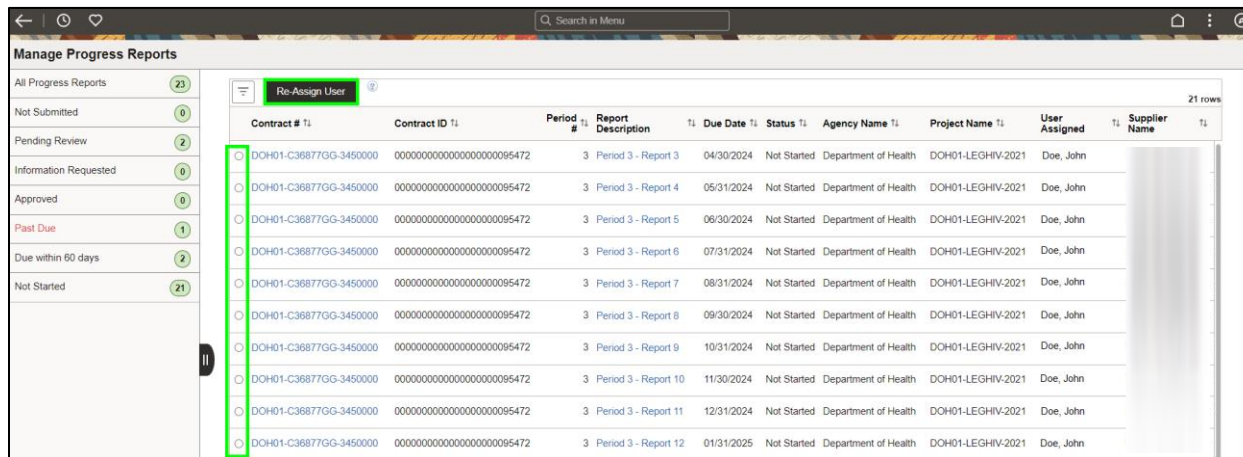
Supplier Name

Clear

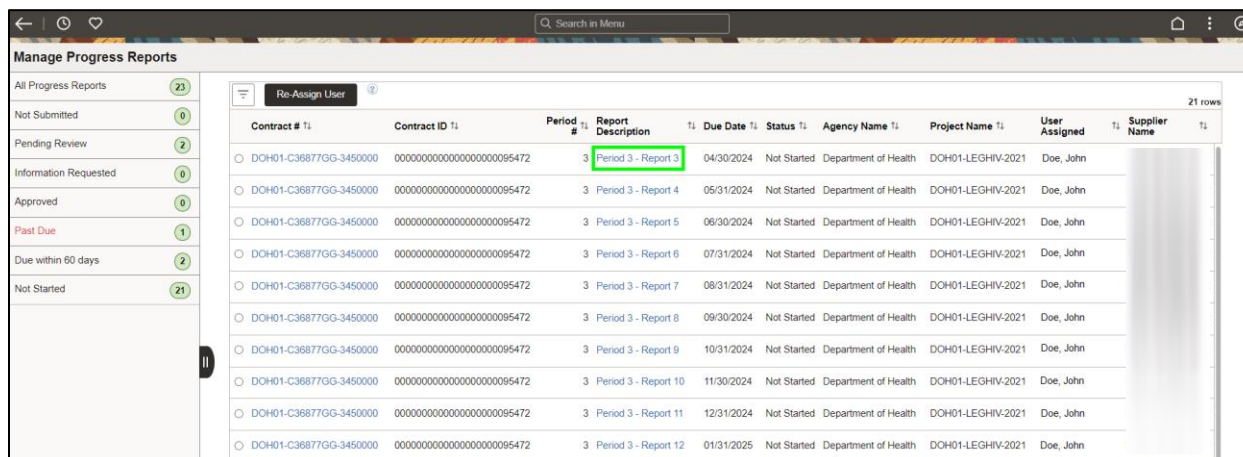
Step	Action
6.	<p>Enter the applicable values in the Search Criteria fields or click the magnifying glass icon to search for the information.</p> <p>Note:</p> <ul style="list-style-type: none"> In order to search by Report Description, a Contract ID must be entered or selected first. In order to search by Project Name, a Business Unit must be entered or selected first.

SFS Handbook: Grantee Processing in SFS

Step	Action
7.	Click the Done button. In this example, we will not filter the progress reports.

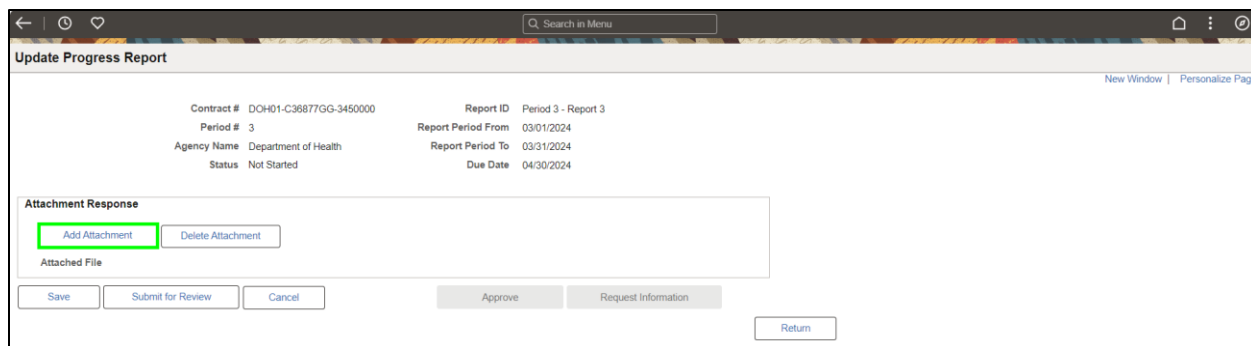


Step	Action
8.	To re-assign a different grantee user to save and submit the progress report follow these steps: <ul style="list-style-type: none"> Select the applicable progress report. Click the Re-Assign User button at the top of the page. Select the User ID to re-assign. Click the Assign Supplier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

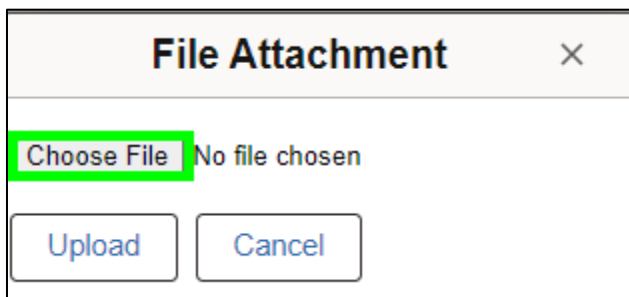


Step	Action
9.	Select the applicable Report Description link to update and submit the progress report.

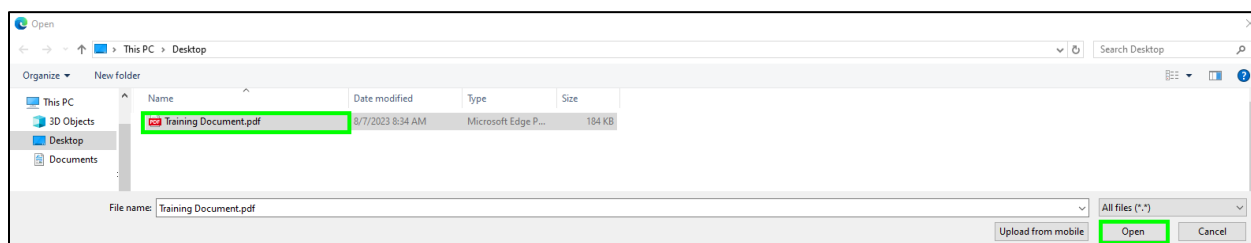
SFS Handbook: Grantee Processing in SFS



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>Note: The View Text/Comment button will only display for the Text/Comment response type.</p>
11.	<p>In this example, the Attachment type is used on the progress report.</p> <p>Click the Add Attachment button to add your attachment to the progress report.</p>

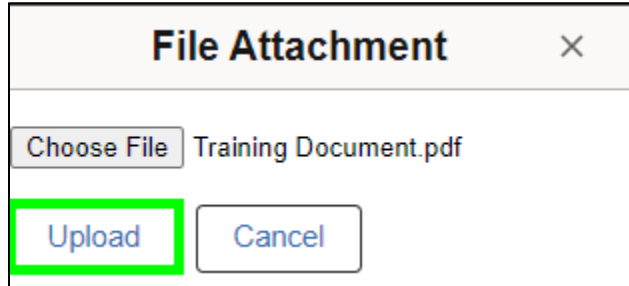


Step	Action
12.	Click the Choose File button.

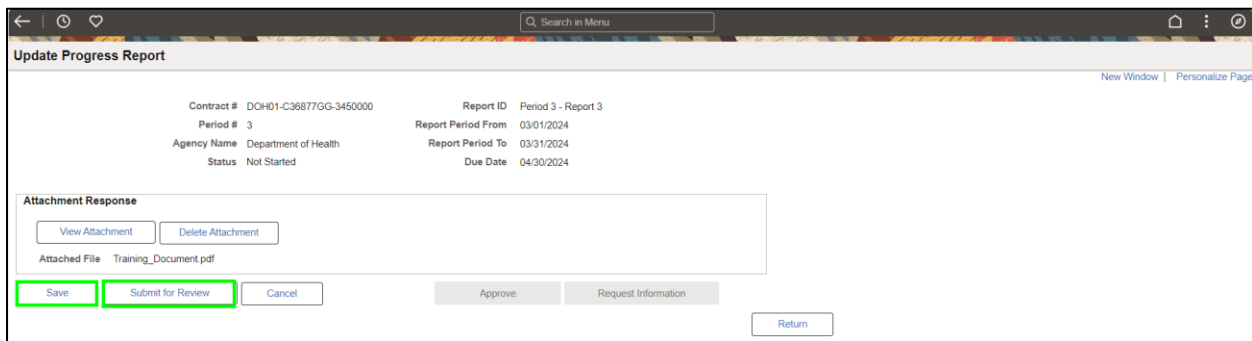


SFS Handbook: Grantee Processing in SFS

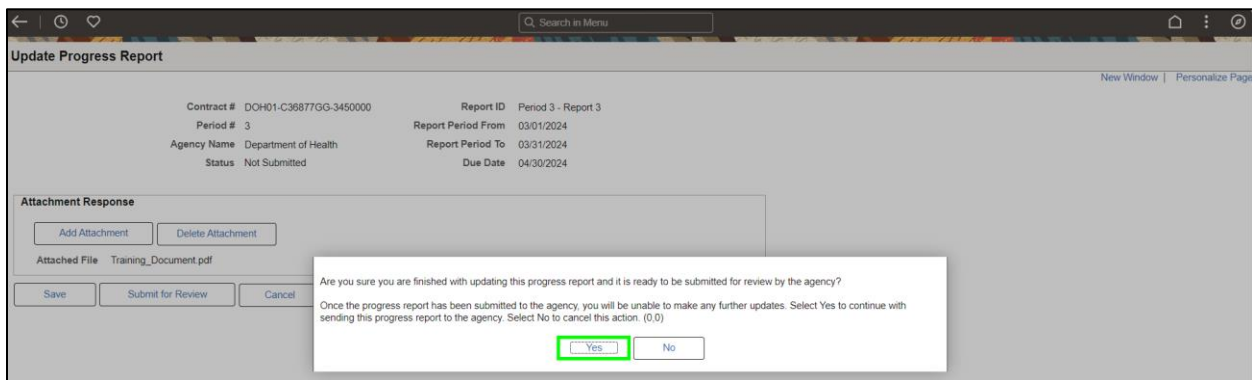
Step	Action
13.	Select the File that you want to upload and click the Open button.



Step	Action
14.	Click the Upload button.



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



SFS Handbook: Grantee Processing in SFS

Step	Action
17.	Click the Yes button to continue sending the progress report 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.
18.	You have successfully completed the Complete Performance Measures for a Progress Report and Submit a Progress Report for Agency Review topic.

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.

SFS role required to perform this task:

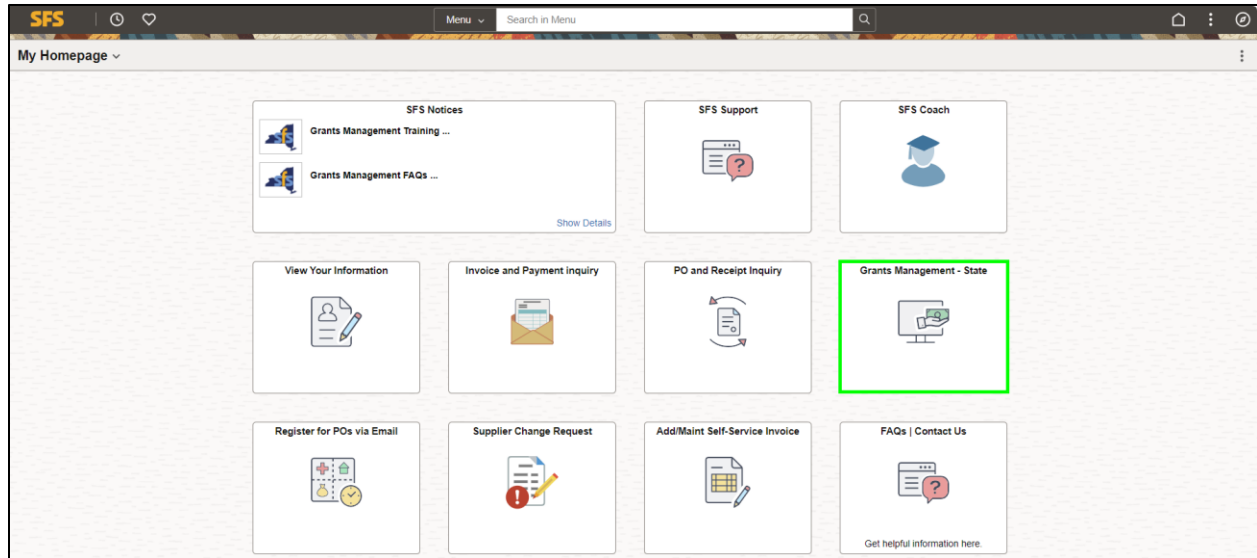
- Progress Report Processor (NY_ES_SUPPLIER_PRGRPT_USER)

Procedure

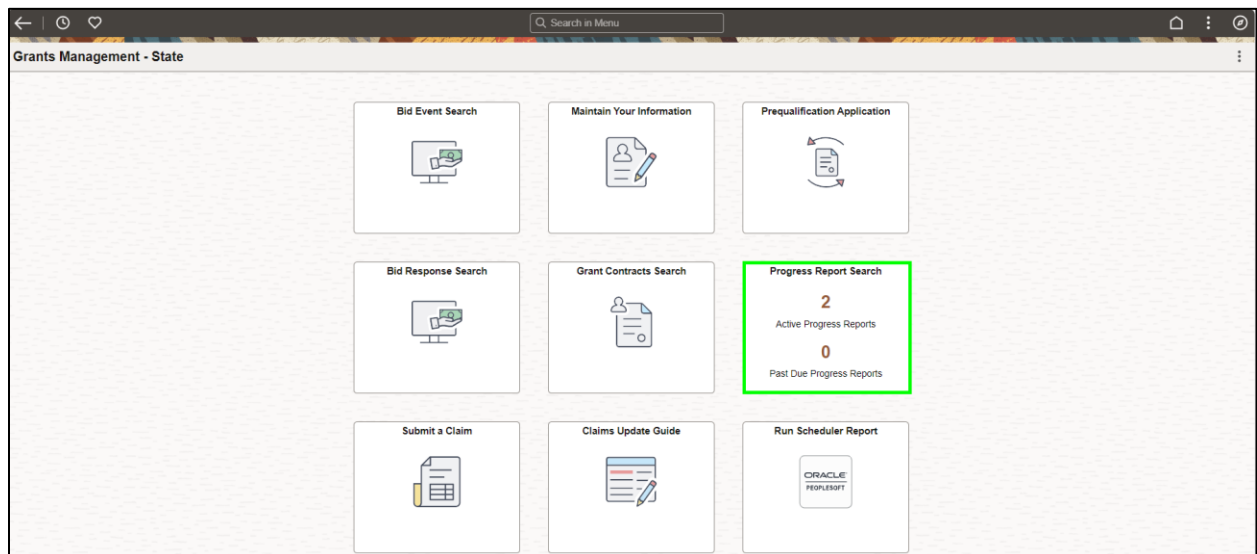
Scenario: You previously submitted a progress report to the agency for review and the agency has returned the progress report to you requesting additional information. You will update and re-submit a progress report that was returned by the agency requesting additional information.

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

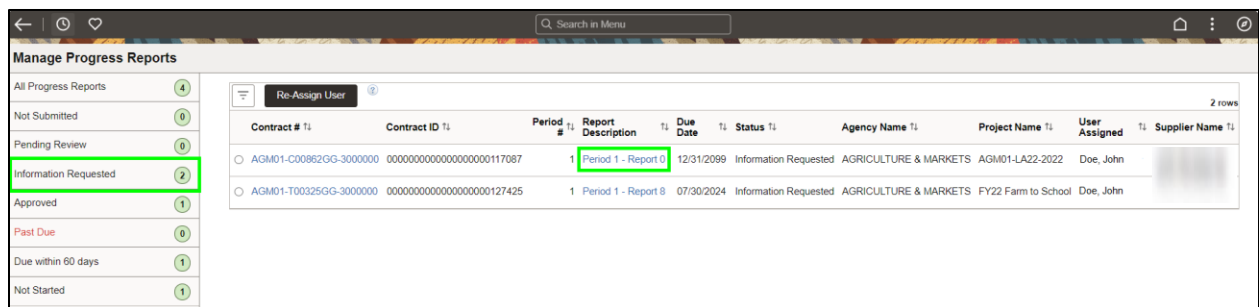


Step	Action
1.	<p>Preferred Navigation: Click the Grant Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > Manage Contracts > Manage Progress Reports.</p> <p>Note: You must log in to the SFS Vendor Portal to update and re-submit a progress report.</p>

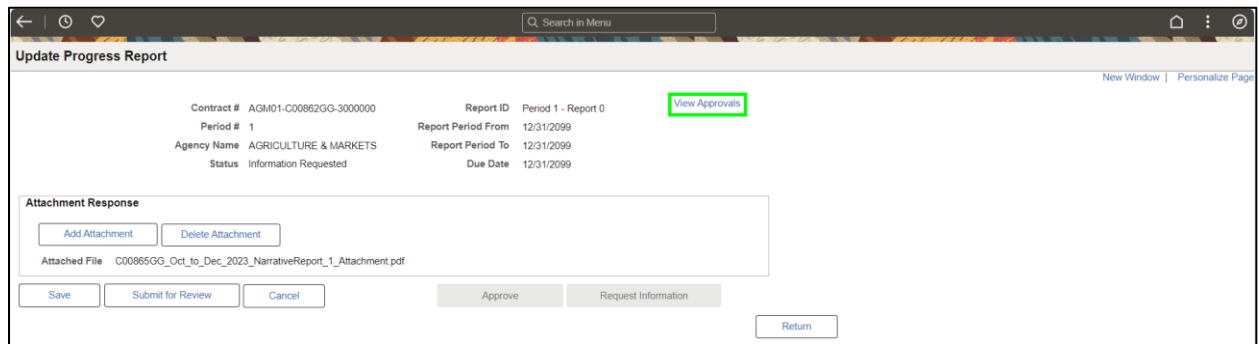


Step	Action
2.	Click the Progress Report Search tile.

SFS Handbook: Grantee Processing in SFS

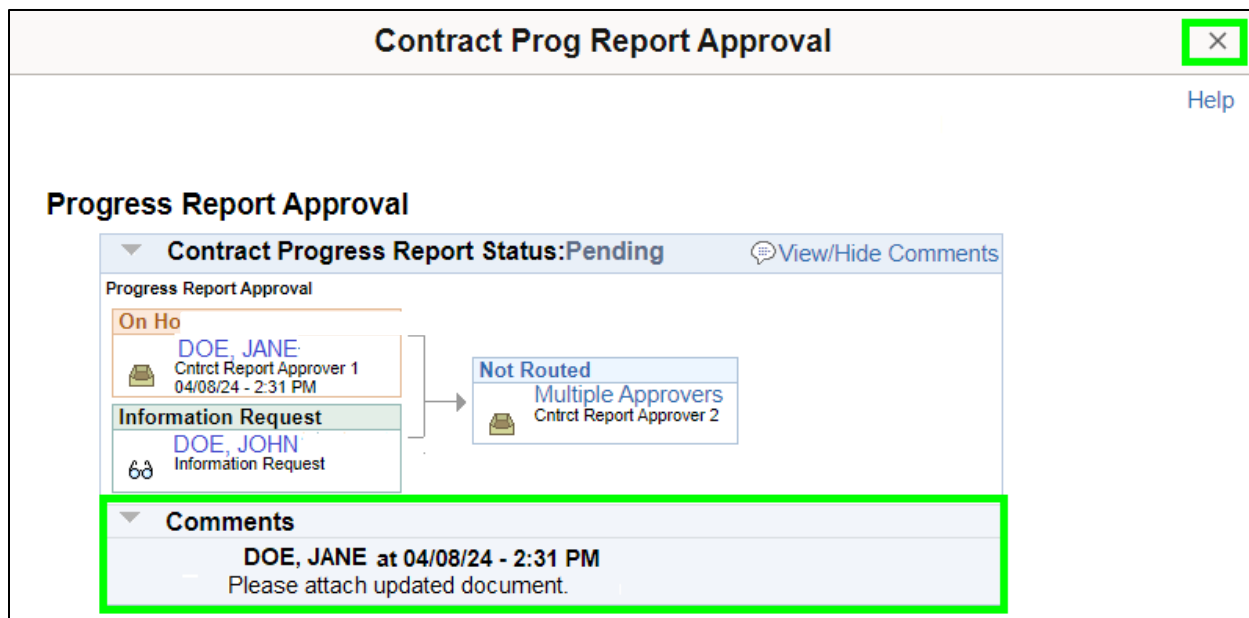


Step	Action
3.	The Manage Progress Reports search page is displayed with a default list of All Progress Reports available.
4.	Select the status tab on the left to display progress reports for an applicable view. Click the Information Requested tab.
5.	Select the applicable Report Description link to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

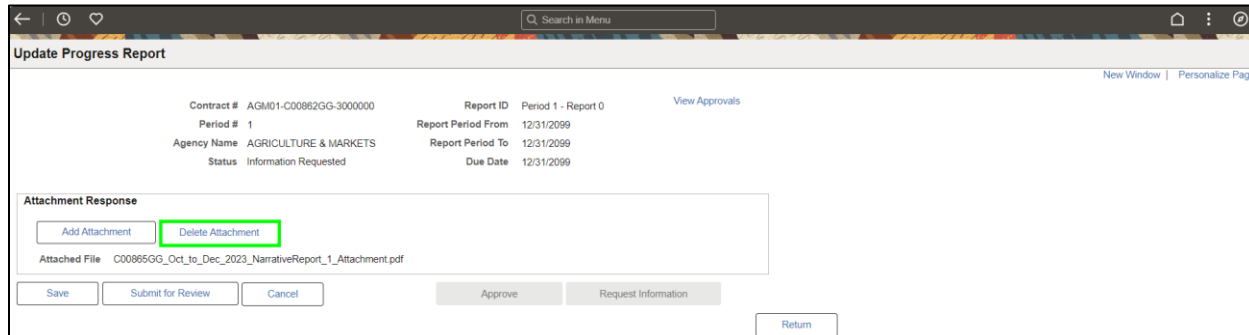


Step	Action
6.	Click the View Approvals link to view the agencies comment(s) on what they want updated on the progress report.

SFS Handbook: Grantee Processing in SFS

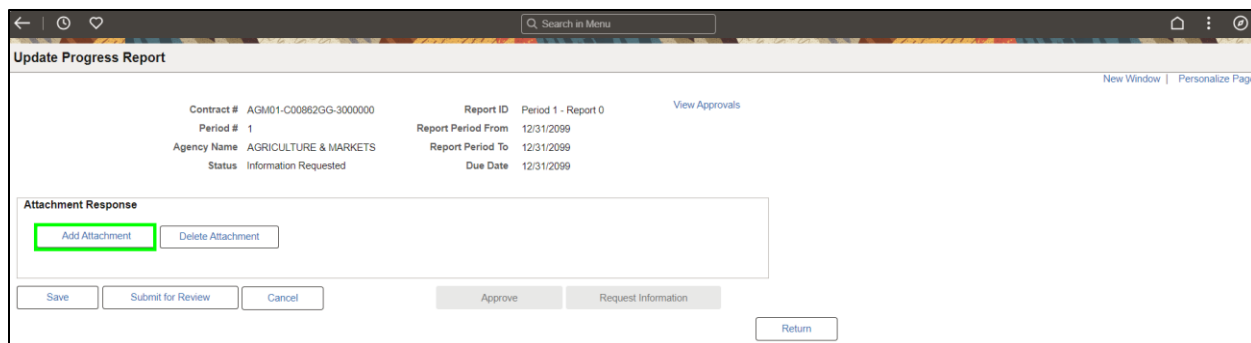


Step	Action
7.	Expand the Comments section to view the comments from the agency.
8.	Click the Close (X) icon in the upper right corner of the page to close the Contract Progress Report Approval page.

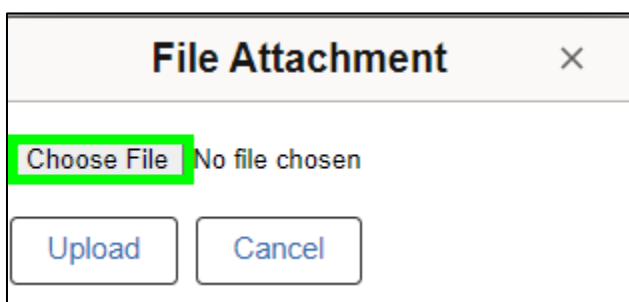


Step	Action
9.	Update the progress report as needed. In this example, click the Delete Attachment button to delete the current attachment.

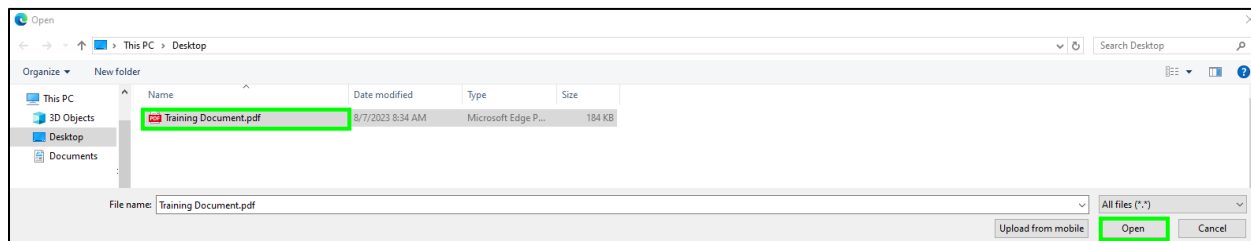
SFS Handbook: Grantee Processing in SFS



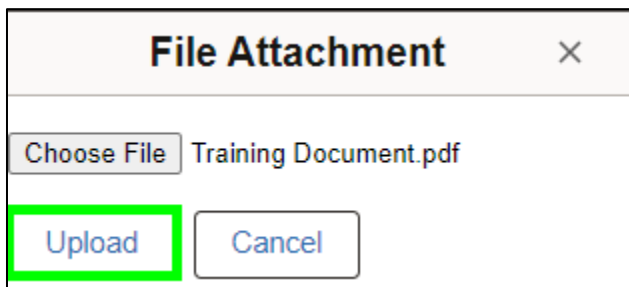
Step	Action
10.	Click the Add Attachment button to upload the new attachment.



Step	Action
11.	Click the Choose File button.



Step	Action
12.	Select the File that you want to upload and click the Open button.



SFS Handbook: Grantee Processing in SFS

Step	Action
13.	Click the Upload button.

Step	Action
14.	Click the Save button to save your changes.
15.	Enter the applicable comment in the Send Comments to Agency field.
16.	Click the Resubmit for Review button to resubmit the progress report to the agency for review.

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)

Step	Action
17.	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.
18.	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

SFS Handbook: Grantee Processing in SFS

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.

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

SFS role(s) required to perform this task:

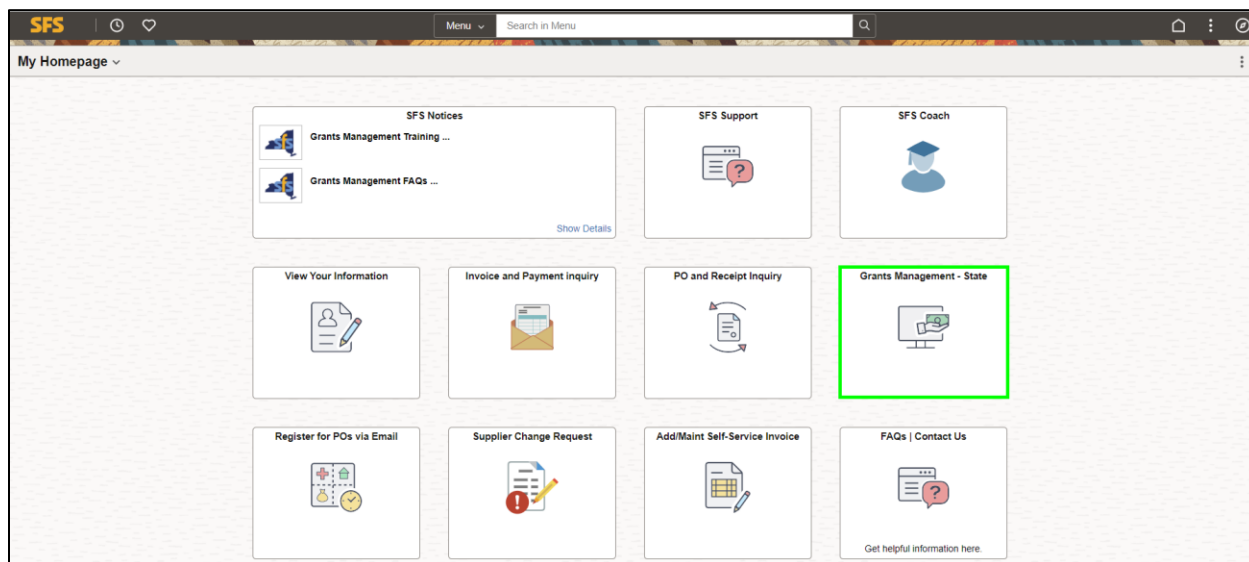
- Claim Initiator (NY_EM_SUPPLIER_CLAIM_ENTRY)
 - **Note:** This role allows you to enter a request for an advance (if allowed on the contract) or reimbursement claim. This role does not have the ability to certify or submit the claim.
- Claim Certifier and Submitter (NY_EM_SUPPLIER_CLAIM_CERT_SUB)
 - **Note:** This role allows you to certify and submit a request for an advance (if allowed on the contract) or reimbursement claim.

Procedure:

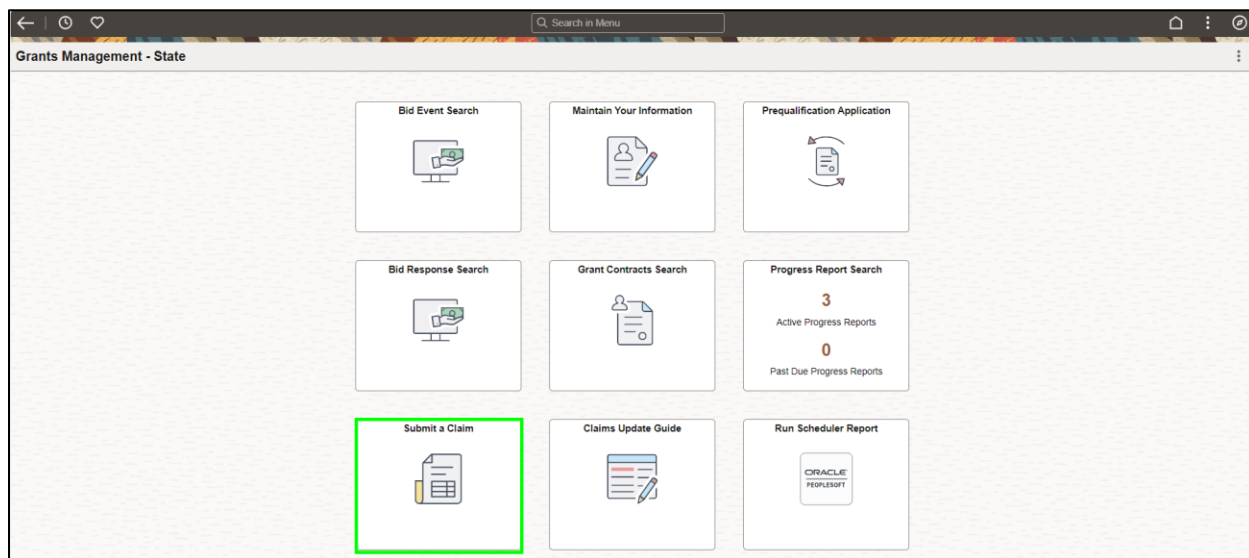
SFS Handbook: Grantee Processing in SFS

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.

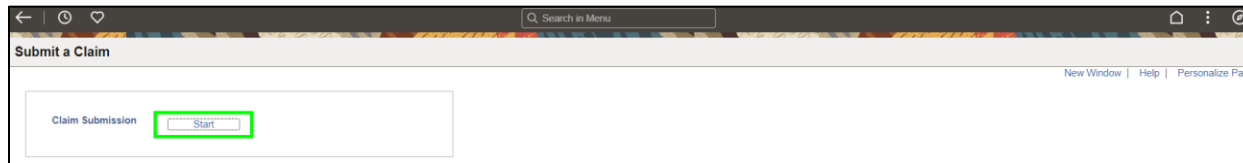


Step	Action
1.	<p>Navigation: Click the Grants Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > eSettlements > Submit a Claim.</p> <p>Note: You must log in to the SFS Vendor Portal to enter a claim.</p>

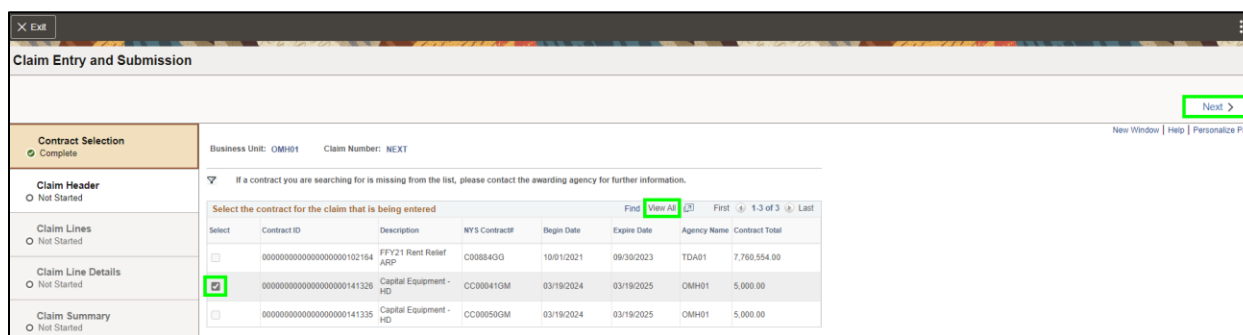


SFS Handbook: Grantee Processing in SFS

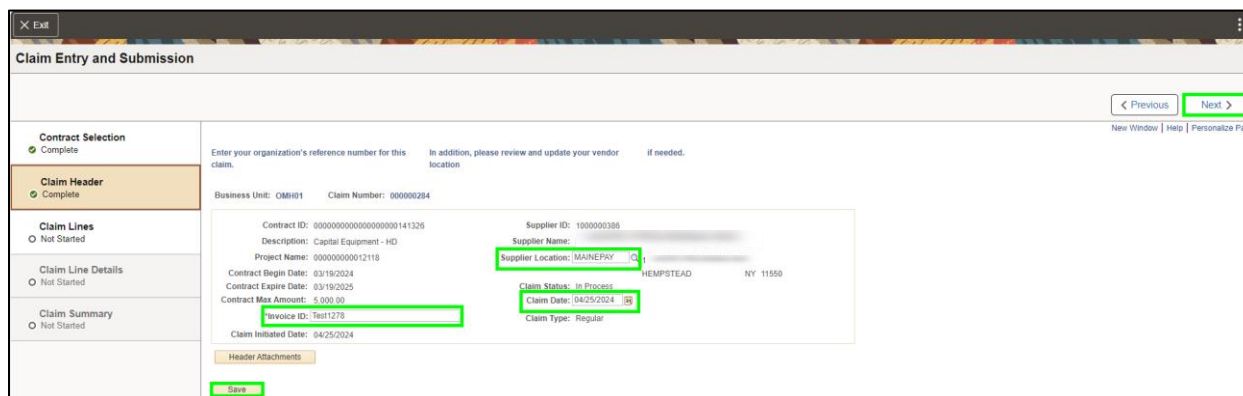
Step	Action
2.	Click the Submit a Claim tile.



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

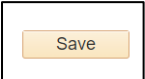



Step	Action
4.	A listing of the first five available contracts display. To view more than five contracts, click the View All link, if applicable.
5.	Click the check box to select the applicable contract.
6.	Click the Next button on the top right-hand corner of the page.



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.	Click the Save button.
	
12.	Click the Next button on the top right corner of the page.
	

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: 000000284 ✕

Contract ID: 000000000000000000000000141326	Supplier ID: 1000000386
Description: Capital Equipment - HD	Supplier Name: [REDACTED]
Project Name: 000000000012118	Supplier Location: MAINEPAY
Contract Begin Date: 03/19/2024	HEMPSTEAD NY 11550
Contract Expire Date: 03/19/2025	Claim Status: In Process
Contract Max Amount: 5,000.00	Claim Date: 04/25/2024
Invoice ID: Test1278	Claim Type: Regular
Claim Initiated Date: 04/25/2024	

Line Number	Contract Period	Period From Date	Period To Date	Period Amount	Line Type
1	1	03/19/2024	03/19/2025	5,000.00	Advance

Save

Step	Action
13.	<p>Choose a Contract Period by clicking on the magnifying glass next to the field.</p> <p>Note: You would select the available contract period based on the payment schedule and due date listed on the contract.</p>
14.	<p>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.</p>

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 Advance line type.</p>
16.	Click the Save button.
17.	Click the Next button.

Claim Entry and Submission

[Previous](#) [Next](#) New Window | Help | Personalize Page

Contract Selection <input checked="" type="radio"/> Complete	Business Unit: OMH01 Claim Number: 000000284 <input checked="" type="checkbox"/>
Claim Header <input checked="" type="radio"/> Complete	Contract ID: 000000000000000000141326 Supplier ID: 1000000386 Description: Capital Equipment - HD Supplier Name: Project Name: 00000000012118 Supplier Location: MAINEPAY
Claim Lines <input checked="" type="radio"/> Complete	Contract Begin Date: 03/19/2024 Contract Expire Date: 03/19/2025 Contract Max Amount: 5,000.00 Invoice ID: Test1278 Claim Status: In Process Claim Date: 04/25/2024 Claim Type: Regular
Claim Line Details <input checked="" type="radio"/> Visited	<div style="border: 1px solid #ccc; padding: 2px;"> <p>Claim Line Details Search 1 of 1 View All</p> <p>Claim Line#: 1 Contract Period: 1 Period Date From: 03/19/2024 Period Date To: 03/19/2025</p> <p>Line Type: Advance Line Comments</p> <p style="text-align: center;"><input type="button" value="Line Attachments"/></p> </div>
Claim Summary <input type="radio"/> Not Started	

Step	Action
18.	Validate the Claim Line Details information and verify the Line type is Advance .
19.	Click the Line Comments button to add a line comment, if needed.

SFS Handbook: Grantee Processing in SFS

Claim Line Comments
×

[Help](#)

Business Unit **OMH01**
Claim Number **000000284**
Line Number **1**

Q
◀ <
1 of 1 ▾
> ▶
View All

+
-

Comment

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.

Claim Entry and Submission

◀ Previous
Next ▶

Contract Selection
● Complete

Claim Header
● Complete

Claim Lines
● Complete

Claim Line Details
● Visited

Claim Summary
○ Not Started

Business Unit: **OMH01**
Claim Number: **000000284** ✘

Contract ID: 00000000000000000141326
 Description: Capital Equipment - HD
 Project Name: 00000000012118

Supplier ID: 1000000386
 Supplier Name: ██████████
 Supplier Location: MAINEPAY

Contract Begin Date: 03/19/2024
 Contract Max Amount: 5,000.00
 Invoice ID: Test1278
 Claim Initiated Date: 04/25/2024

HEMPSTEAD NY 11550
 Claim Status: In Process
 Claim Date: 04/25/2024
 Claim Type: Regular

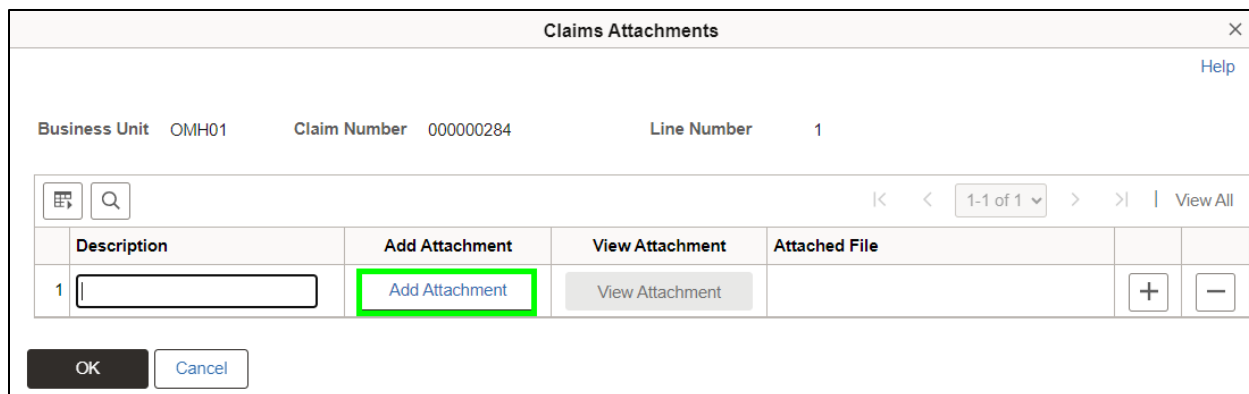
Q
◀ <
1 of 1 ▾
> ▶
View All

Claim Line#: 1 Contract Period: 1 Period Date From: 03/19/2024 Period Date To: 03/19/2025
 Line Type: Advance

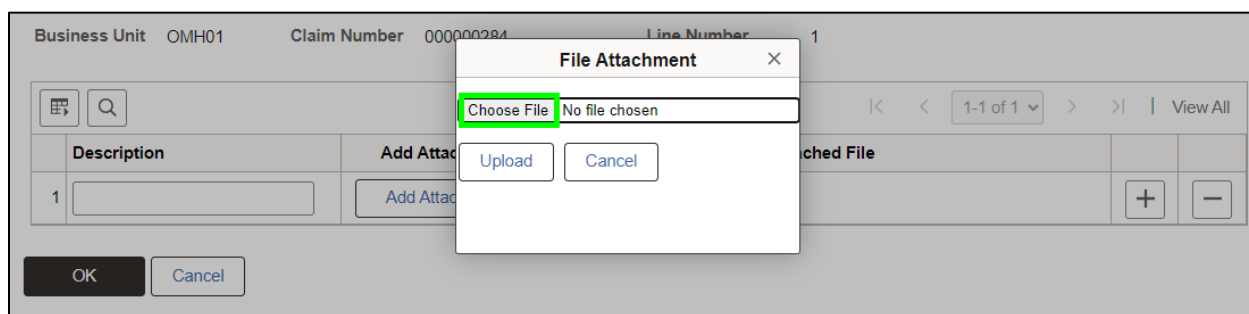
Line Comments
Line Attachments

Step	Action
22.	Click the Line Attachments button to add an attachment for the line, if needed.

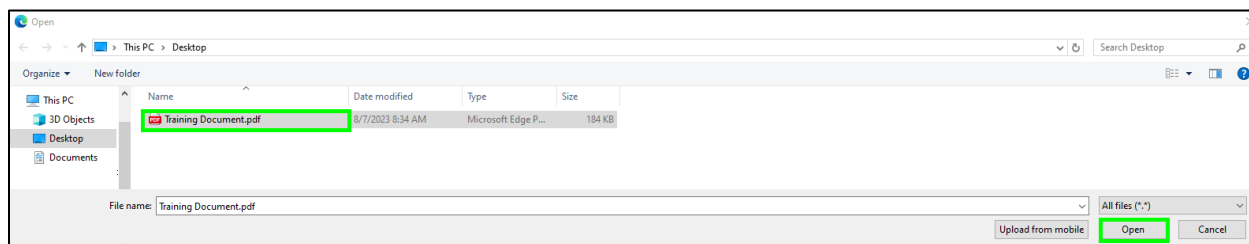
SFS Handbook: Grantee Processing in SFS



Step	Action
23.	Click the Add Attachment button.

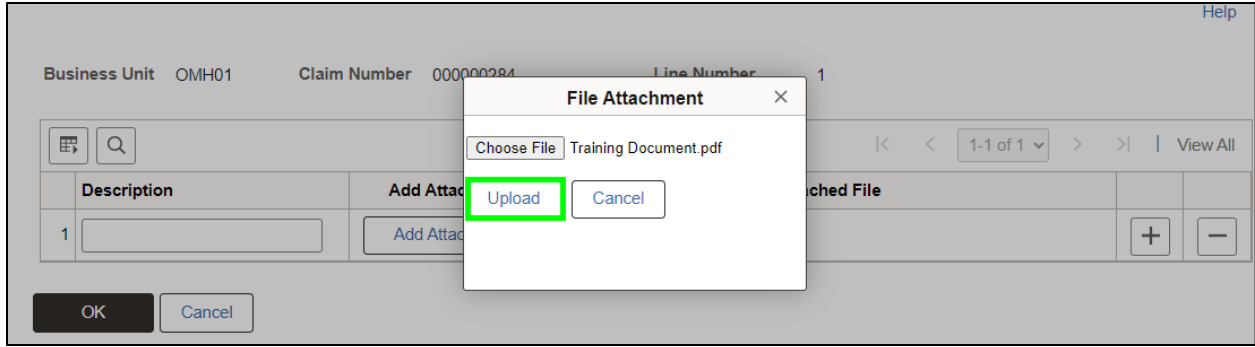


Step	Action
24.	Click the Choose File button.

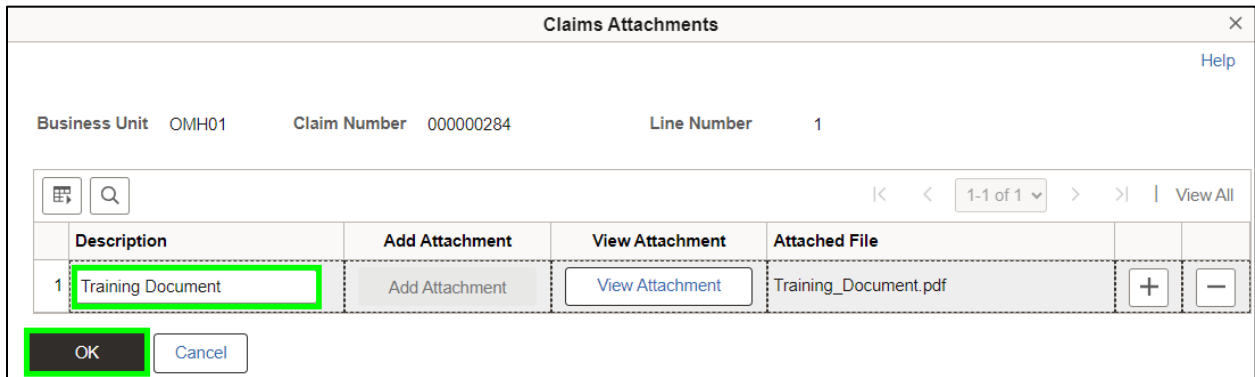


Step	Action
25.	Select the File that you want to upload and click the Open button.

SFS Handbook: Grantee Processing in SFS

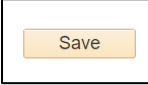



Step	Action
26.	Click the Upload button.



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

SFS Handbook: Grantee Processing in SFS

Step	Action
29.	Enter the applicable value into the Advance Amount Requested field. In this example, we will enter 500 into the Advance Amount Requested field.
30.	Enter the applicable justification into the Advance Request Justification field.
31.	Click the Save button. 
32.	Click the Next button. 

SFS Handbook: Grantee Processing in SFS

Step	Action
33.	Click the Claim Entry Complete checkbox.
34.	Click the Certification checkbox
35.	Click the Save button and then click the Submit button.
36.	Click the OK button. The Claim is now submitted into agency workflow and the claim Status changes to Agency Review .
37.	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

SFS role(s) required to perform this task:

- Claim Initiator (NY_EM_SUPPLIER_CLAIM_ENTRY)
 - **Note:** This role allows you to enter a request for an advance (if allowed on the contract) or reimbursement claim. This role does not have the ability to certify or submit the claim.
- Claim Certifier and Submitter (NY_EM_SUPPLIER_CLAIM_CERT_SUB)

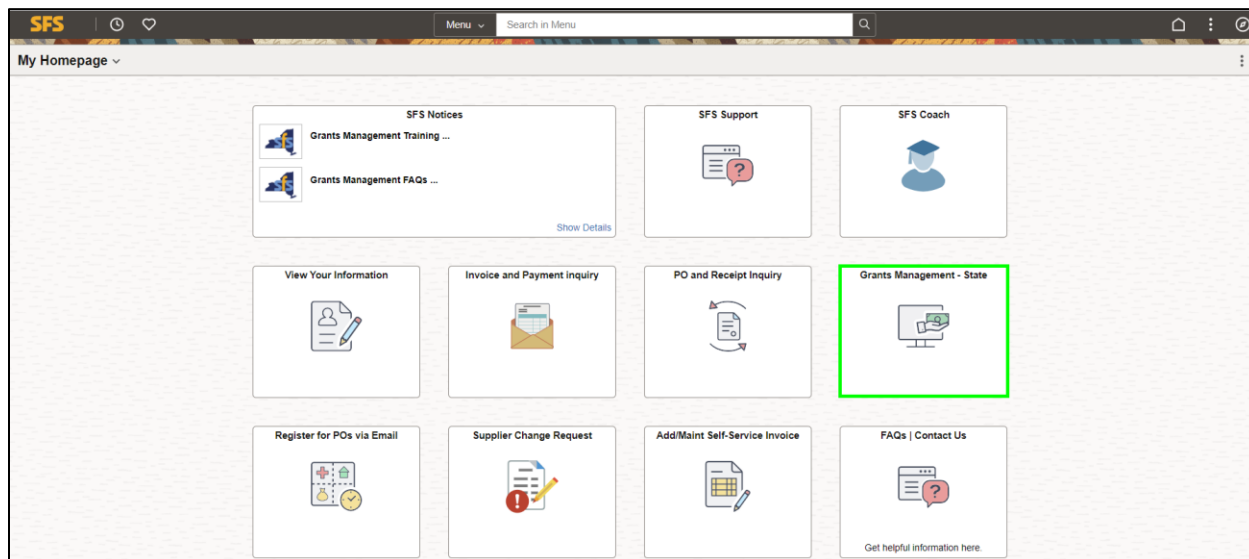
SFS Handbook: Grantee Processing in SFS

- **Note:** This role allows you to certify and submit a request for an advance (if allowed on the contract) or reimbursement claim.

Procedure:

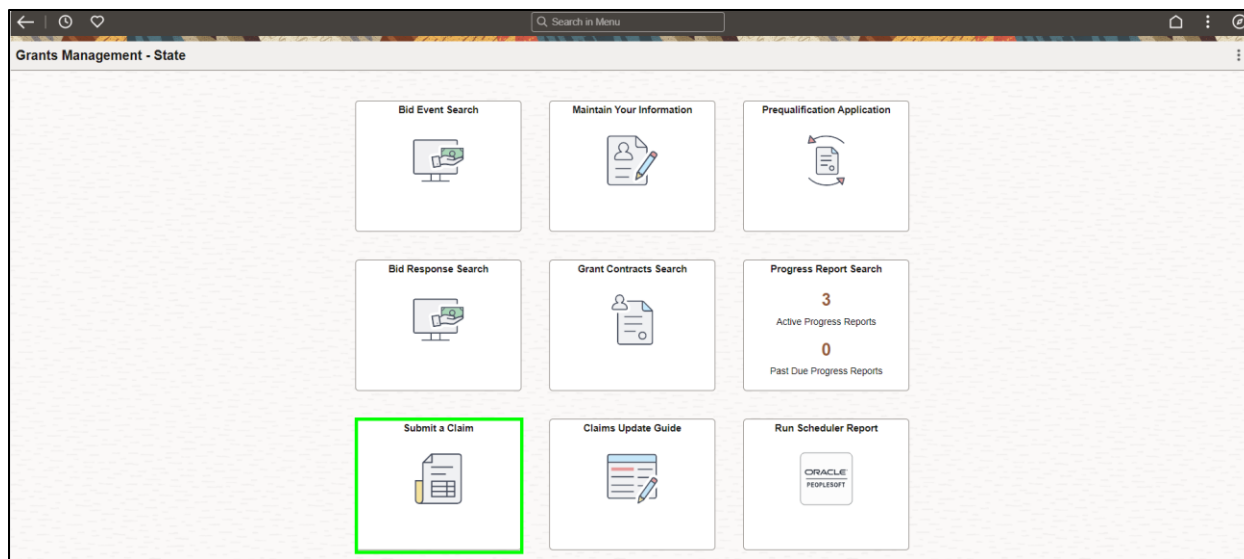
Scenario: You want to submit a reimbursement payment claim on an approved grant contract with remaining funds available.

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.

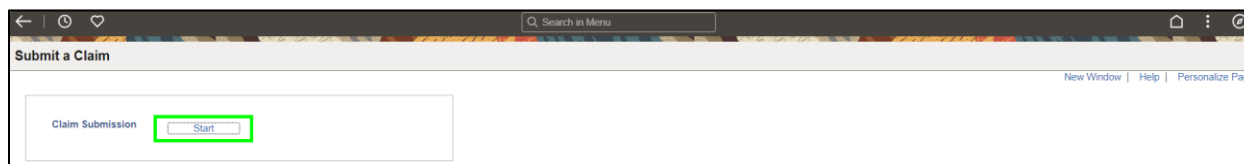


Step	Action
1.	<p>Navigation: Click the Grants Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > eSettlements > Submit a Claim.</p> <p>Note: You must log in to the SFS Vendor Portal to enter a claim.</p>

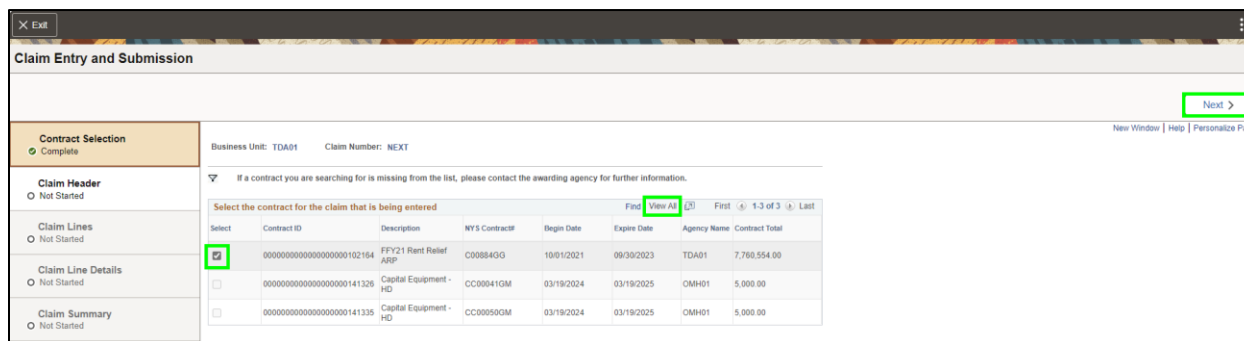
SFS Handbook: Grantee Processing in SFS



Step	Action
2.	Click the Submit a Claim tile.



Step	Action
3.	Click the Start button.



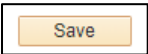
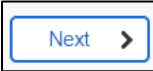
Step	Action
4.	A listing of the first five available contracts display. To view more than five contracts, click the View All link, if applicable.
5.	Click the checkbox to select the appropriate contract.
6.	Click the Next button.

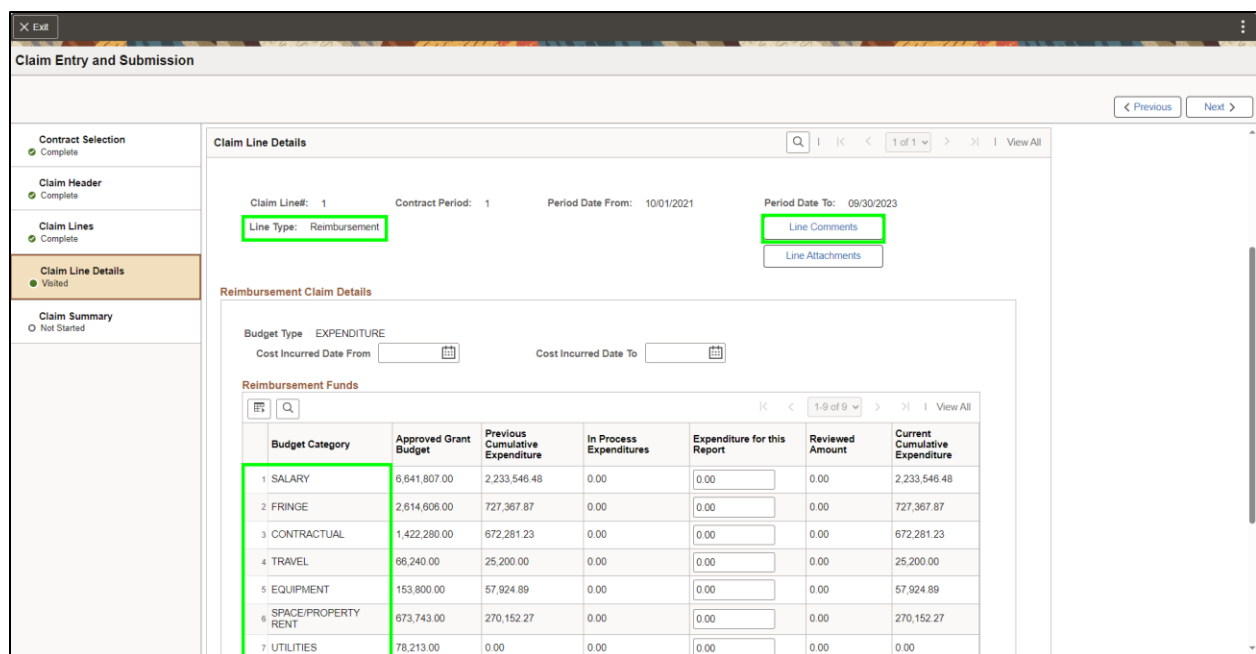
SFS Handbook: Grantee Processing in SFS

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

Line Number	Contract Period	Period From Date	Period To Date	Period Amount	Line Type
1	1	10/01/2021	09/30/2023	7,760,554.00	Reimbursement

SFS Handbook: Grantee Processing in SFS

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. 



Claim Line Details

Claim Line#: 1 Contract Period: 1 Period Date From: 10/01/2021 Period Date To: 09/30/2023

Line Type: Reimbursement Line Comments

Line Attachments

Reimbursement Claim Details

Budget Type: EXPENDITURE Cost Incurred Date From: Cost Incurred Date To:

Reimbursement Funds

Budget Category	Approved Grant Budget	Previous Cumulative Expenditure	In Process Expenditures	Expenditure for this Report	Reviewed Amount	Current Cumulative Expenditure
1 SALARY	6,641,807.00	2,233,546.48	0.00	0.00	0.00	2,233,546.48
2 FRINGE	2,614,606.00	727,367.87	0.00	0.00	0.00	727,367.87
3 CONTRACTUAL	1,422,280.00	672,281.23	0.00	0.00	0.00	672,281.23
4 TRAVEL	66,240.00	25,200.00	0.00	0.00	0.00	25,200.00
5 EQUIPMENT	153,800.00	57,924.89	0.00	0.00	0.00	57,924.89
6 SPACE/PROPERTY RENT	673,743.00	270,152.27	0.00	0.00	0.00	270,152.27
7 UTILITIES	78,213.00	0.00	0.00	0.00	0.00	0.00

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 to add a line comment, if needed.

SFS Handbook: Grantee Processing in SFS

X

Claim Line Comments

Help

Business Unit TDA01
Claim Number 000005484
Line Number 1

Q
|<
<
1 of 1 v
>
>|
View All

Comment

+
-

OK

Cancel

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.

X Exit

Claim Entry and Submission

< Previous
Next >

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

Claim Line Details

Q
|<
<
1 of 1 v
>
>|
View All

Claim Line#: 1 Contract Period: 1 Period Date From: 10/01/2021 Period Date To: 09/30/2023

Line Type: Reimbursement

Line Comments
Line Attachments

Reimbursement Claim Details

Budget Type EXPENDITURE

Cost Incurred Date From Cost Incurred Date To

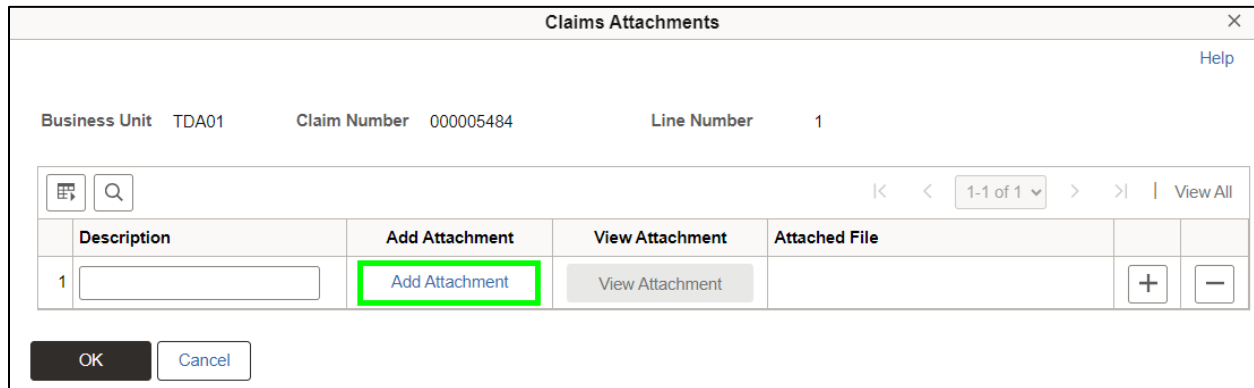
Reimbursement Funds

Q
|<
<
1-9 of 9 v
>
>|
View All

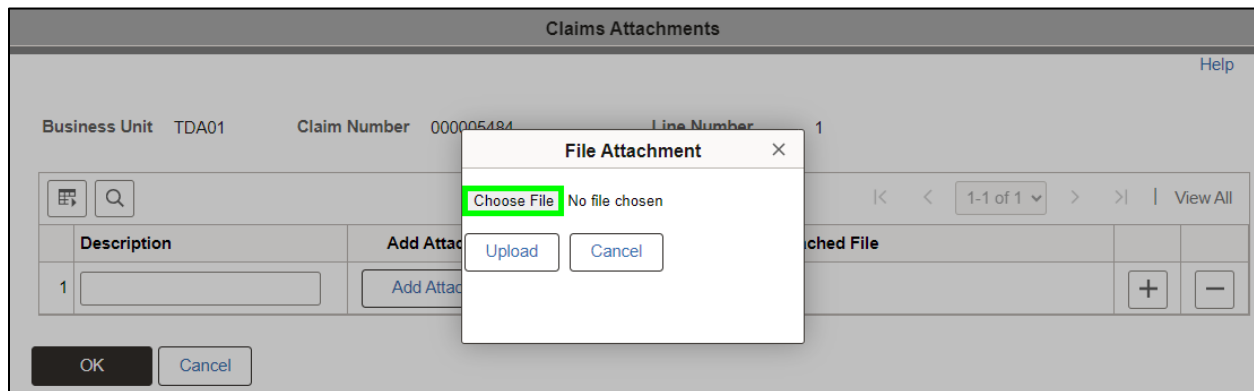
Budget Category	Approved Grant Budget	Previous Cumulative Expenditure	In Process Expenditures	Expenditure for this Report	Reviewed Amount	Current Cumulative Expenditure
1 SALARY	6,641,807.00	2,233,546.48	0.00	0.00	0.00	2,233,546.48
2 FRINGE	2,614,606.00	727,367.87	0.00	0.00	0.00	727,367.87
3 CONTRACTUAL	1,422,280.00	672,281.23	0.00	0.00	0.00	672,281.23
4 TRAVEL	66,240.00	25,200.00	0.00	0.00	0.00	25,200.00
5 EQUIPMENT	153,800.00	57,924.89	0.00	0.00	0.00	57,924.89
6 SPACE/PROPERTY RENT	673,743.00	270,152.27	0.00	0.00	0.00	270,152.27
7 UTILITIES	78,213.00	0.00	0.00	0.00	0.00	0.00

SFS Handbook: Grantee Processing in SFS

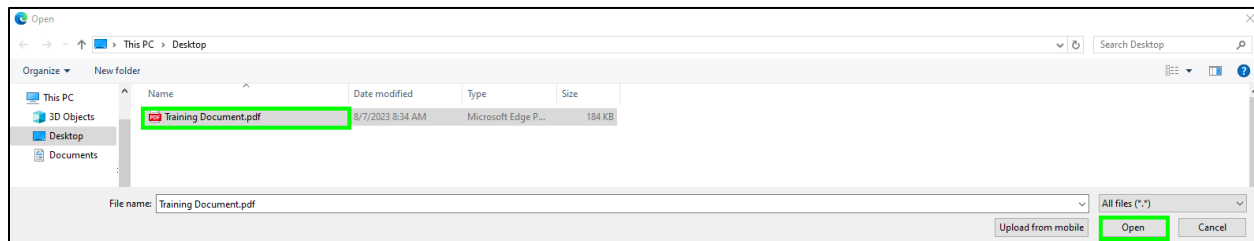
Step	Action
21.	Click the Line Attachments button to add an attachment for a line, if needed.



Step	Action
22.	Click the Add Attachment button.

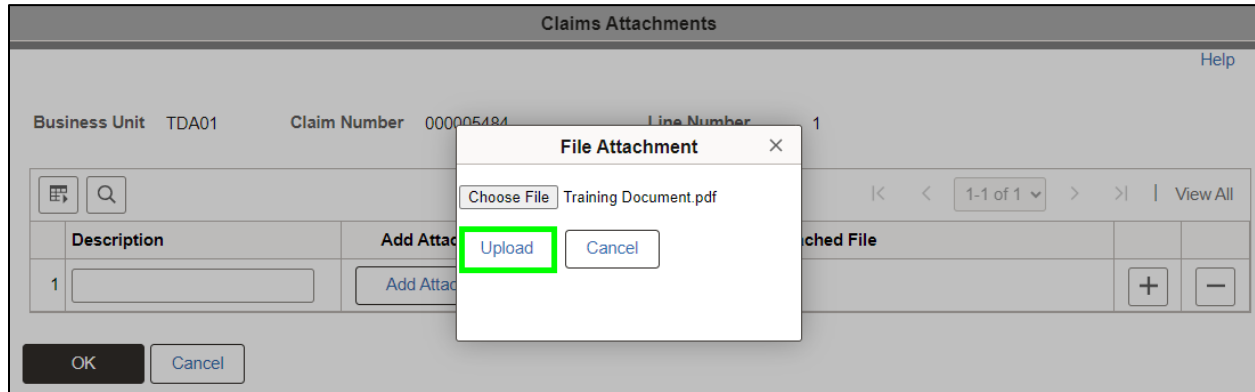


Step	Action
23.	Click the Choose File button.

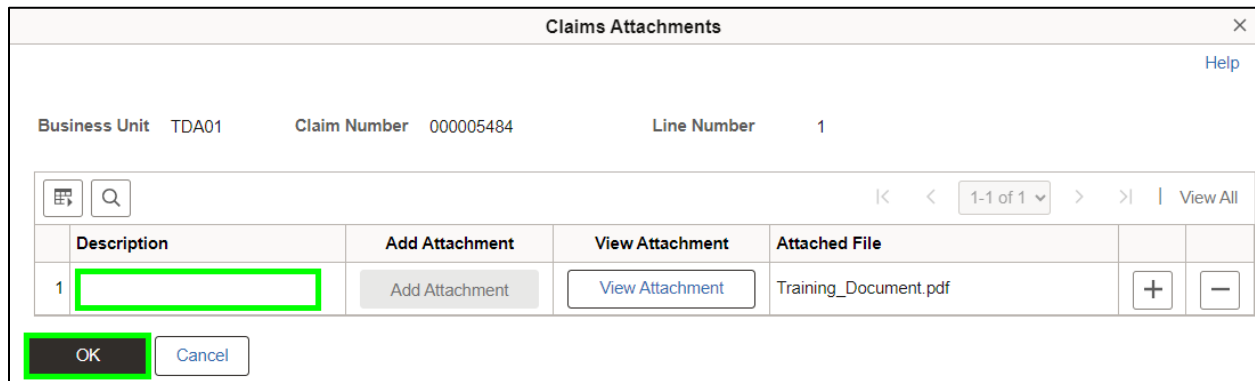


SFS Handbook: Grantee Processing in SFS

Step	Action
24.	Select your pdf file and click the Open button. Note: Only .pdf files can be uploaded.



Step	Action
25.	Click the Upload button.



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

SFS Handbook: Grantee Processing in SFS

Claim Entry and Submission

Contract Selection Complete

Claim Header Complete

Claim Lines Complete

Claim Line Details Visited

Claim Summary Not Started

Budget Type EXPENDITURE

Cost Incurred Date From 09/16/2023

Cost Incurred Date To 09/30/2023

Reimbursement Funds

Budget Category	Approved Grant Budget	Previous Cumulative Expenditure	In Process Expenditures	Expenditure for this Report	Reviewed Amount	Current Cumulative Expenditure
1 SALARY	6,641,807.00	2,233,546.48	0.00	<input type="text" value="10.00"/>	0.00	2,233,556.48
2 FRINGE	2,614,606.00	727,367.87	0.00	<input type="text" value="5.00"/>	0.00	727,372.87
3 CONTRACTUAL	1,422,280.00	672,281.23	0.00	<input type="text" value="2.00"/>	0.00	672,283.23
4 TRAVEL	66,240.00	25,200.00	0.00	<input type="text" value="5.00"/>	0.00	25,205.00
5 EQUIPMENT	153,800.00	57,924.89	0.00	<input type="text" value="3.00"/>	0.00	57,927.89
6 SPACE/PROPERTY RENT	673,743.00	270,152.27	0.00	<input type="text" value="2.00"/>	0.00	270,154.27
7 UTILITIES	78,213.00	0.00	0.00	<input type="text" value="5.00"/>	0.00	5.00
8 OPERATING EXPENSES	766,198.00	302,573.87	0.00	<input type="text" value="6.00"/>	0.00	302,579.87
9 OTHER	517,370.00	0.00	0.00	<input type="text" value="3.00"/>	0.00	3.00
Grant Fund Totals	12,934,257.00	4,289,046.61	0.00	41.00	0.00	4,289,087.61
Match Fund Totals	0.00	0.00	0.00	0.00	0.00	0.00

Save

Previous Next

Step	Action
28.	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.
29.	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.
30.	Click the Save button
31.	Click the Next button.

SFS Handbook: Grantee Processing in SFS

Claim Entry and Submission

Contract Selection Complete

Claim Header Complete

Claim Lines Complete

Claim Line Details Complete

Claim Summary Visited

Claim Header Comments History View History

Workflow Comment History 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	10/01/2021	09/30/2023	Reimburse	41.00

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	1000000386	<input type="button" value="View Attachment"/>

Step	Action
32.	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.
33.	Click the Add Comments button to add a claim header comment.

Claim Entry and Submission

Contract Selection Complete

Claim Header Complete

Claim Lines Complete

Claim Line Details Complete

Claim Summary Visited

Claim Line Summary

Line Number	Contract Period	Period From Date	Period To Date	Line Type	Amount Requested
1	1	10/01/2021	09/30/2023	Reimburse	41.00

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	1000000386	<input type="button" value="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 1000000386
Date 04/25/2024

SFS Handbook: Grantee Processing in SFS

Step	Action
34.	Click the Claim Entry Complete checkbox.
35.	Click the Certification checkbox.
36.	Click the Save button
37.	Click the Submit button.
38.	Click the OK button. The claim is submitted into agency workflow and the claim Status changes to Agency Review .
39.	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

SFS role(s) required to perform this task:

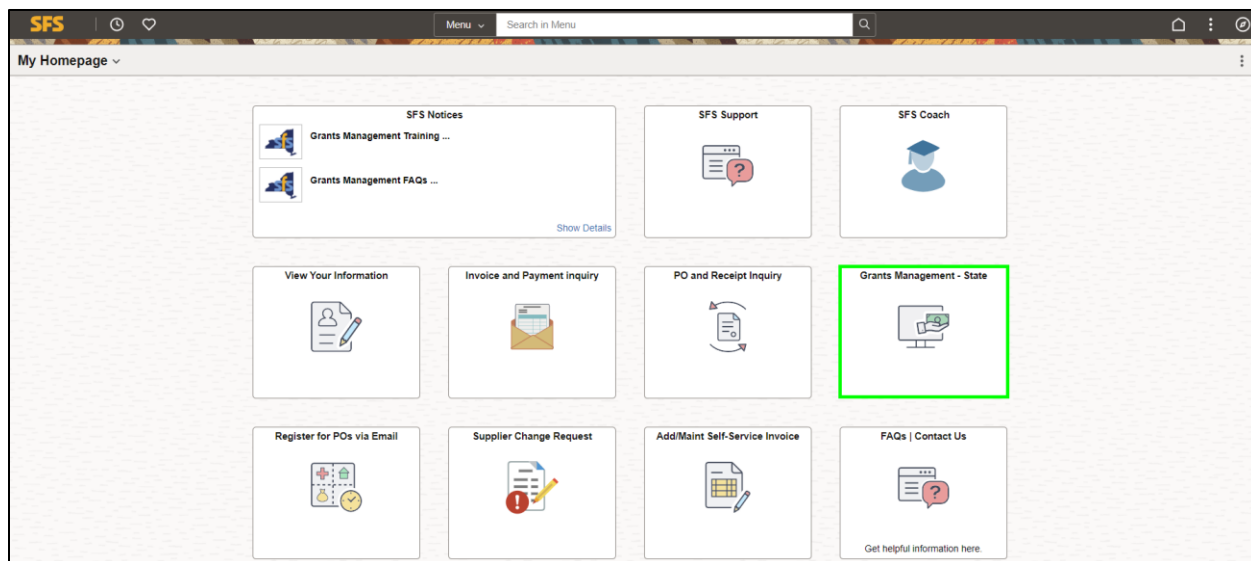
- Claim Initiator (NY_EM_SUPPLIER_CLAIM_ENTRY)
 - **Note:** This role allows you to enter a request for an advance (if allowed on the contract) or reimbursement claim. This role does not have the ability to certify or submit the claim.
- Claim Certifier and Submitter (NY_EM_SUPPLIER_CLAIM_CERT_SUB)
 - **Note:** This role allows you to certify and submit a request for an advance (if allowed on the contract) or reimbursement claim.

Procedure:

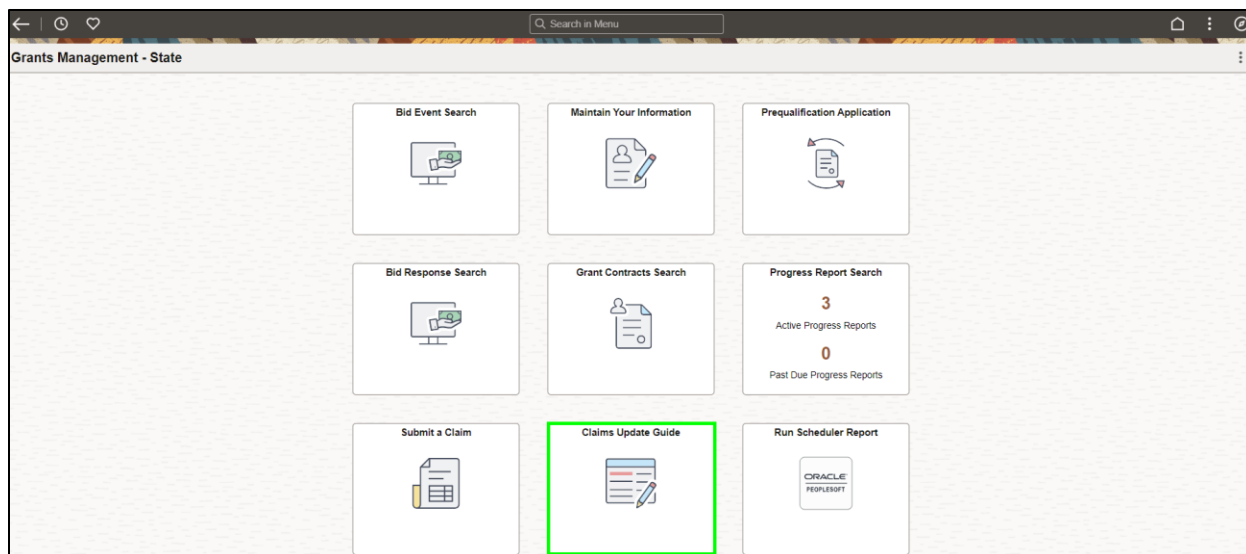
Scenario: You started entering a claim, but did not finish entering it, and saved the claim to work on later. You now need to complete the remaining claim information and submit the claim for agency approval.

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>



Step	Action
2.	Click the Claims Update Guide tile.

SFS Handbook: Grantee Processing in SFS

Claims Update Guide

Manage Claims New Window | Help | Personalize Page

Search Criteria

SetID: SHARE

Business Unit:

Supplier ID:

Supplier Name:

Claim Number:

Claim Date:

Claim Status: In Process

Contract ID:

NYS Contract #:

Invoice ID:

Invoice Date:

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.

Manage Claims New Window | Help | Personalize Page

All Claims (1) Visited

In Process (1) Visited

Returned (0) Not Started

Completed (0) Not Started

Select claim to be updated

Claim Number	Invoice Number	Claim Status	Contract ID	Business Unit	Claim Date	Claim Entered By User	Claim Last Updated By	Claim Total
000000287	test8736	In Process	000000000000000000000000141335	OMH01	04/25/2024	1000000386	1000000386	500.00

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.

SFS Handbook: Grantee Processing in SFS

Step	Action
7.	Select the applicable section(s) on the left of the page that you need to complete.
8.	After completing the remaining claims information, click the Claim Summary section to submit the claim for approval.
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:

- How to update and resubmit a returned claim

SFS role(s) required to perform this task:

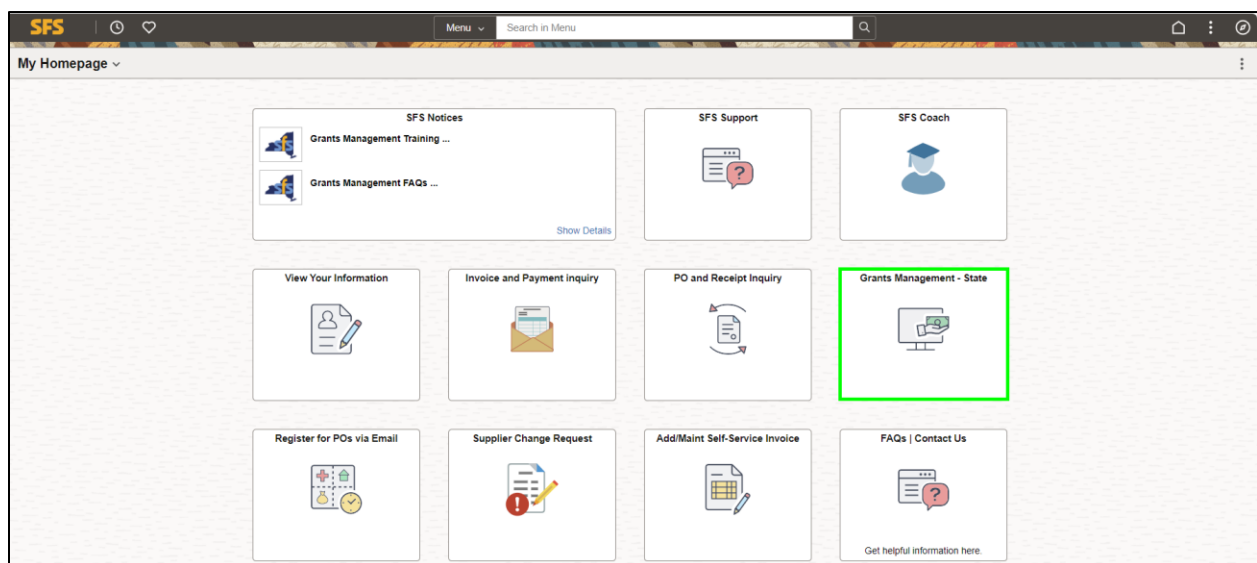
SFS Handbook: Grantee Processing in SFS

- Claim Initiator (NY_EM_SUPPLIER_CLAIM_ENTRY)
 - **Note:** This role allows you to enter a request for an advance (if allowed on the contract) or reimbursement claim. This role does not have the ability to certify or submit the claim.
- Claim Certifier and Submitter (NY_EM_SUPPLIER_CLAIM_CERT_SUB)
 - **Note:** This role allows you to certify and submit a request for an advance (if allowed on the contract) or reimbursement claim.

Procedure:

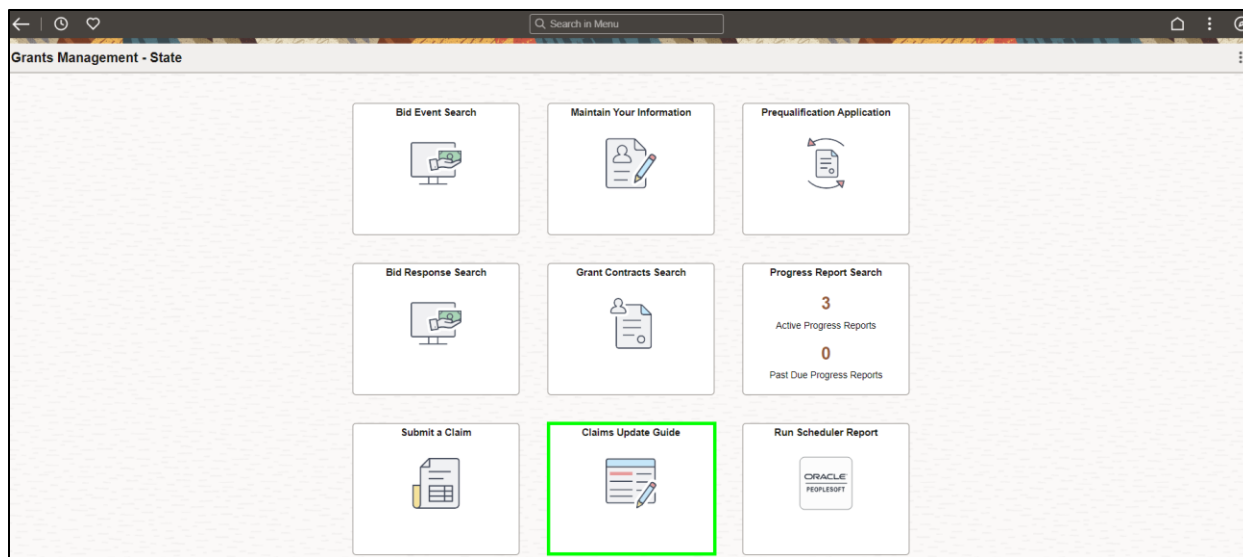
Scenario: You previously submitted a claim for agency review. The agency has returned your claim and requests that you attach additional supporting documentation. You need to update your claim with additional supporting documents and resubmit your claim to the agency for approval.

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.

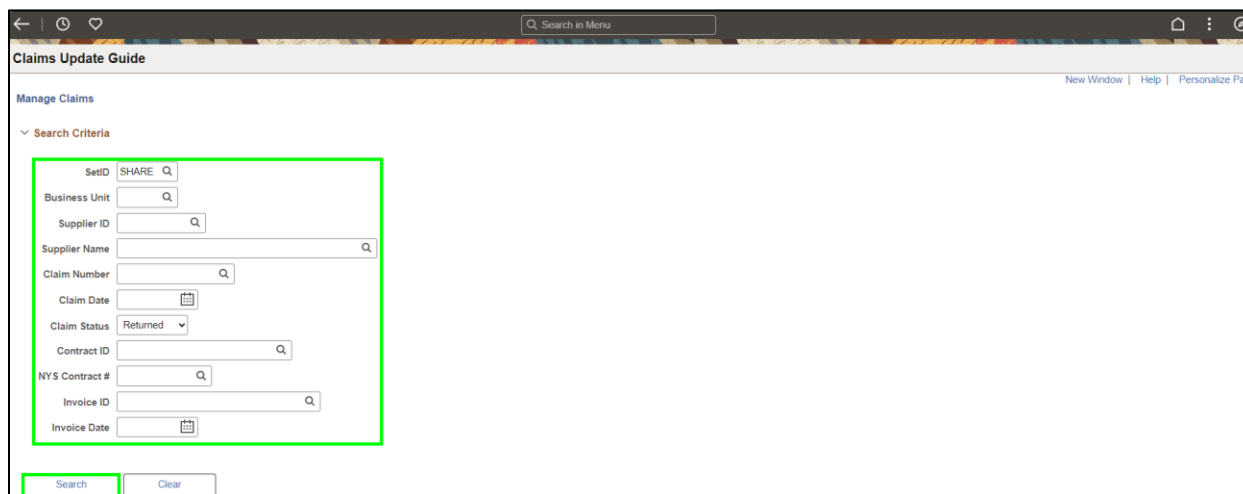


Step	Action
1.	<p>Navigation: Click the Grants Management - State tile.</p> <p>Alternative Navigation: From the NavBar navigate to: Menu > eSettlements > Claims Update Guide.</p>

SFS Handbook: Grantee Processing in SFS



Step	Action
2.	Click the Claims Update Guide tile.



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.

SFS Handbook: Grantee Processing in SFS

Claim Number	Invoice Number	Claim Status	Contract ID	Project Name	Business Unit	Claim Date	Claim Entered By
000000287	test8736	Returned	00000000000000000000141335	Capital Equipment - HD	OMH01	04/25/2024	1000000386

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.

Header Attachment Summary

File Name	Description	Uploaded by User	View Attachment
1			View Attachment

Workflow Comment History

[View History](#)

Please attach additional documentation.
 Comment Added By: jdoe
 on 2024-04-25-11:45:23 000000

[View History](#)

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

SFS Handbook: Grantee Processing in SFS

Claims Comments X

Help

Business Unit OMH01 **Claim ID** 000000287

⌵ 🔍 < < 1-1 of 1 > > | View All

#	Comments	Comment Entered By	Comment Entered On
1	Please attach additional documentation.	jdoe	04/25/2024 11:45AM

OK
Cancel

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

✕ Exit
New Window | Help | Personalize Page

Update Claim
< Previous Next >

- Contract Selection Complete
- Claim Header Complete
- Claim Lines Complete
- Claim Line Details Complete
- Claim Summary Visited

Business Unit: OMH01 Claim Number: 000000287 ✕

Contract ID: 000000000000000000141335	Supplier ID: 1000000396
Description: Capital Equipment - HD	Supplier Name: ██████████
Project Name: 00000000012118	Supplier Location: MAINEPAY
Contract Begin Date: 03/19/2024	HEMPSTEAD NY 11550
Contract Expire Date: 03/19/2025	Claim Status: Returned
Contract Max Amount: 5,000.00	Claim Date: 04/25/2024
Invoice ID: test6736	Claim Type: Regular
Claim Initiated Date: 04/25/2024	

Claim Line Details 🔍 | < < 1 of 1 > > | View All

Claim Line#: 1 Contract Period: 1 Period Date From: 03/19/2024 Period Date To: 03/19/2025

Line Type: Advance

Line Comments
Line Attachments

Advance Request Details

Period Total	5,000.00
Advance Percentage	10.00
Advance Amount Calculated	500.00
Advance Amount Requested	500.00

Advance Request Justification

Advance Needed

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 menu on the left of the page.
12.	Click the Line Attachments button to upload additional documentation.

Page 202

SFS Handbook: Grantee Processing in SFS

The screenshot shows the 'Claims Attachments' window with the following details:

- Business Unit: OMH01
- Claim Number: 000000287
- Line Number: 1

Description	Add Attachment	View Attachment	Attached File	
1 Training Document	Add Attachment	View Attachment	Training_Document.pdf	+

Buttons: OK, Cancel

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

The screenshot shows the 'Claims Attachments' window with two rows:

Description	Add Attachment	View Attachment	Attached File	
1 Training Document	Add Attachment	View Attachment	Training_Document.pdf	+
2	Add Attachment	View Attachment		+

Buttons: OK, Cancel

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

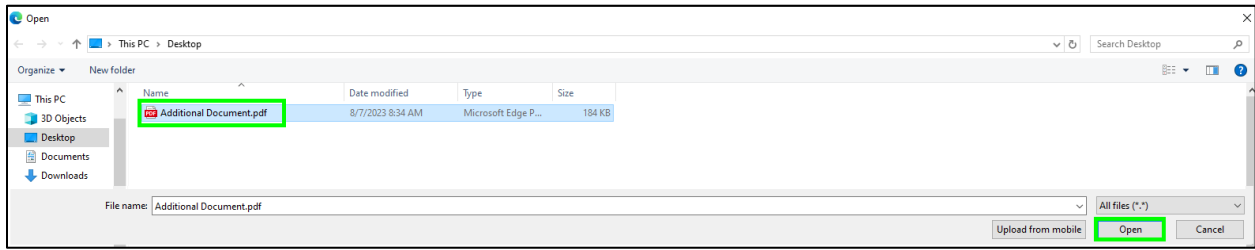
The screenshot shows the 'Claims Attachments' window with a 'File Attachment' dialog box open over the second row. The dialog box contains:

- Buttons: Choose File, No file chosen, Upload, Cancel

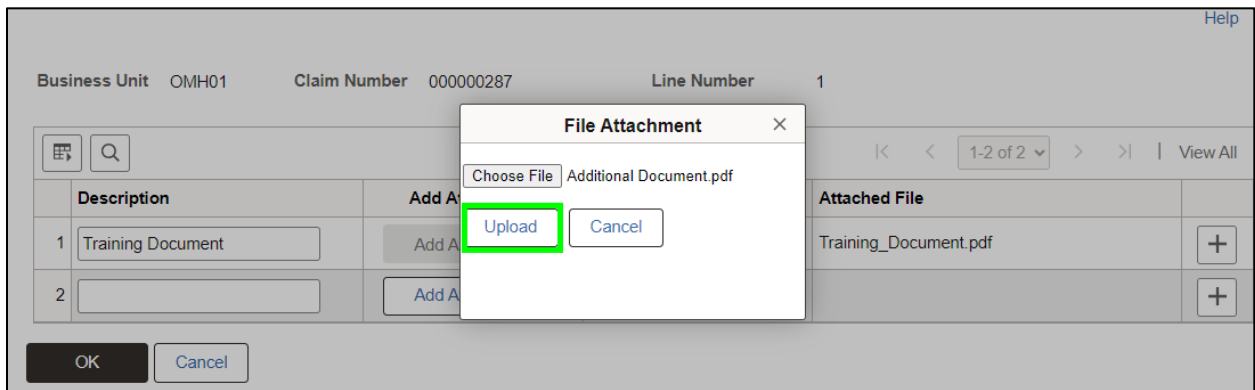
The 'Choose File' button is highlighted with a green box.

Step	Action
15.	Click the Choose File button.

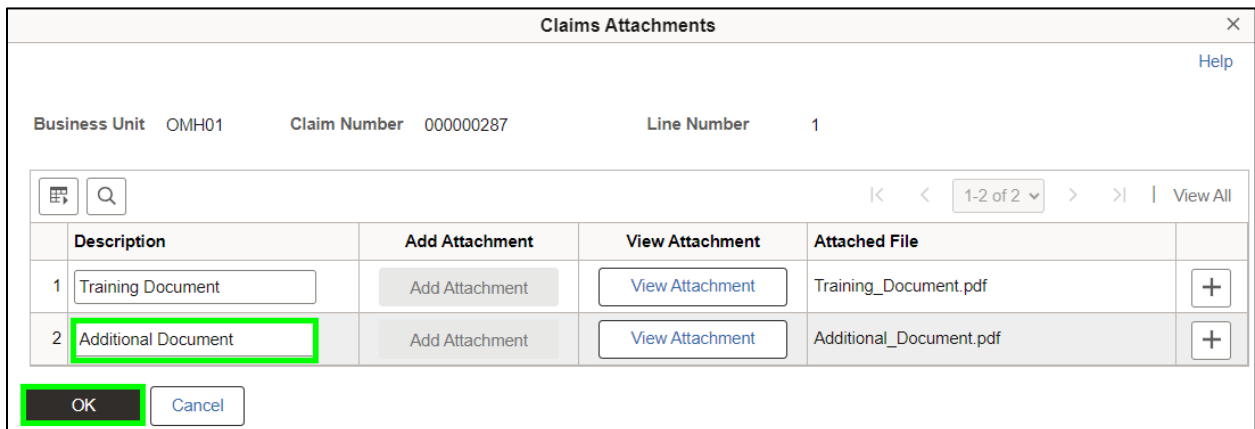
SFS Handbook: Grantee Processing in SFS



Step	Action
16.	Select your pdf file and click the Open button. Note: Only .pdf files can be uploaded.



Step	Action
17.	Click the Upload button.



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

SFS Handbook: Grantee Processing in SFS

Update Claim

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

Description: Capital Equipment - HD
 Project Name: 00000000012118
 Contract Begin Date: 03/19/2024
 Contract Max Amount: 5,000.00
 Invoice ID: test8736
 Claim Initiated Date: 04/25/2024

Supplier Name: [Redacted]
 Supplier Location: MAINEPAY
 HEMPSTEAD NY 11550
 Claim Status: Returned
 Claim Date: 04/25/2024
 Claim Type: Regular

Claim Line Details

Line Number	Contract Period	Period Date From	Period Date To	Line Type
1	1	03/19/2024	03/19/2025	Advance

Advance Request Details

Period Total: 5,000.00
 Advance Percentage: 10.00
 Advance Amount Calculated: 500.00
 Advance Amount Requested: 500.00
 Advance Request Justification: Advance Needed

Save

Step	Action
20.	Click the Save button.

Update Claim

Contract Selection: Complete
 Claim Header: Complete
 Claim Lines: Complete
 Claim Line Details: Complete
 Claim Summary: Visited

Claim Line Summary

Line Number	Contract Period	Period From Date	Period To Date	Line Type	Amount Requested
1	1	03/19/2024	03/19/2025	Advance	500.00

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	1000000386	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: 1000000386
 Date: 04/25/2024

Save Submit

Step	Action
21.	Click the Claim Summary menu on the left side of the page.

SFS Handbook: Grantee Processing in SFS

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

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

SFS role required to perform this task:

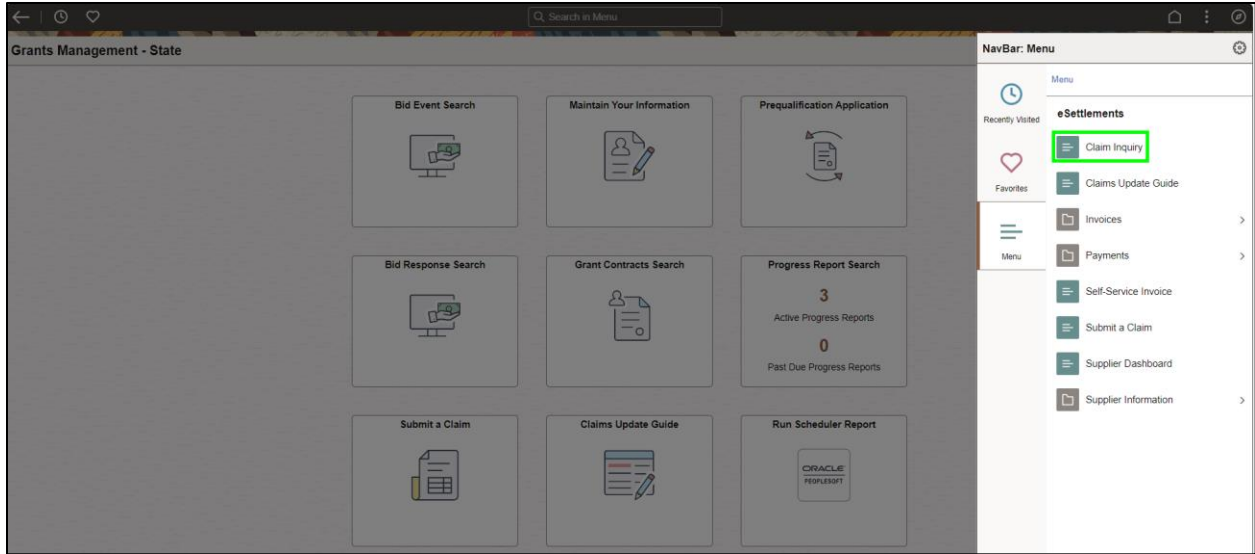
- Claim Inquiry (NY_EM_SUPPLIER_CLAIM_INQUIRY)

Procedure:

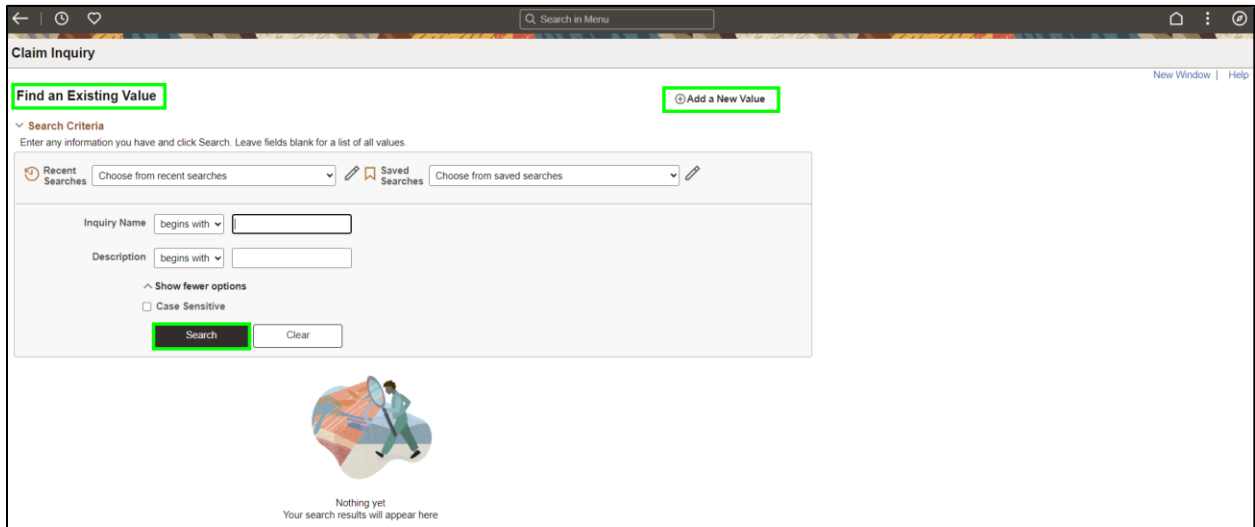
Scenario: You want to look up a claim and see where it is in the approval process.

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.

SFS Handbook: Grantee Processing in SFS



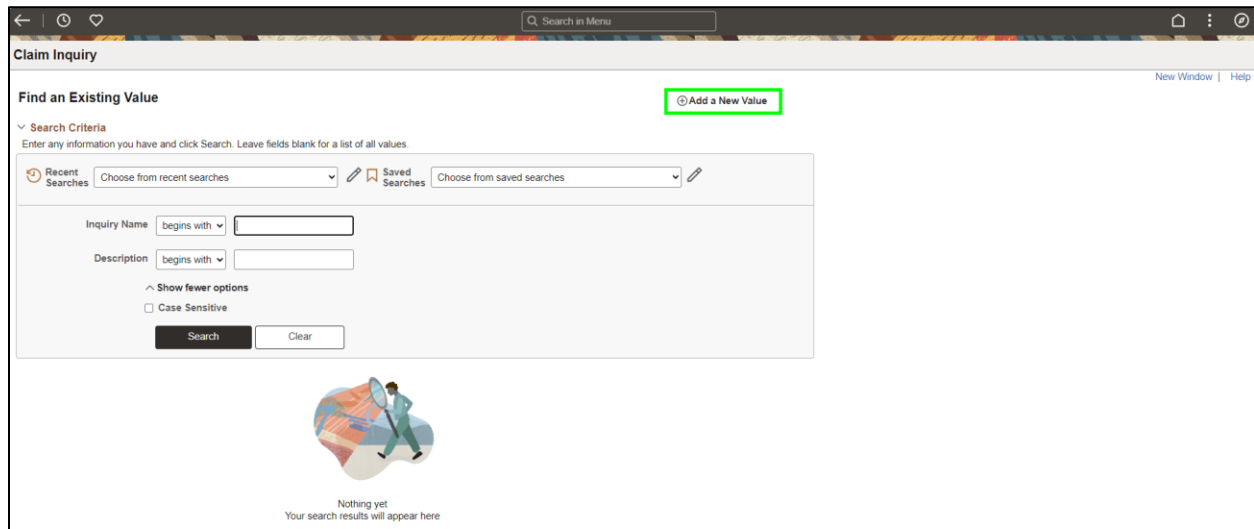
Step	Action
1.	From the NavBar navigate to: Menu > eSettlements > Claim Inquiry. Note: You must log in to the SFS Vendor Portal to view a claim.



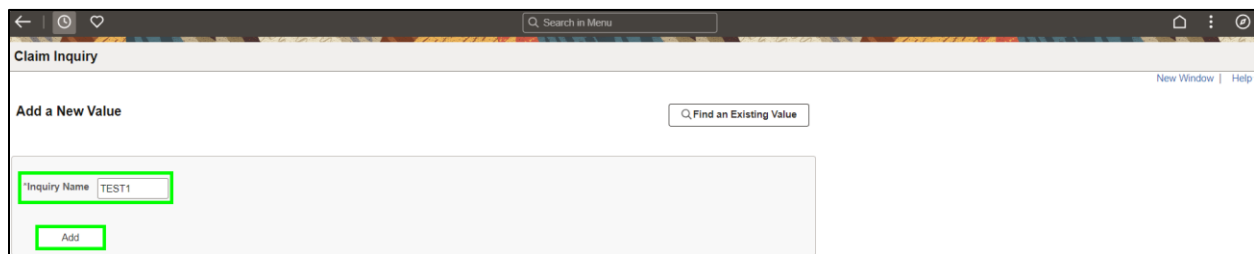
Step	Action
2.	Note: The Claim Inquiry feature allows you to search for and view existing claims. The search criteria you use to search for existing claims can be saved under an Inquiry Name so you can access and reuse it each time you search for claim(s).

SFS Handbook: Grantee Processing in SFS

Step	Action
3.	<p>If you already created and saved Claim Inquiry Name(s), you can use the Find an Existing Value page. You would enter the applicable search criteria and click the Search button to display the existing Inquiry Names that can be selected.</p> <p>or</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 button, enter the desired Claim Inquiry Name, and click the Add button.</p>



Step	Action
4.	<p>In this example, we will create new Inquiry Name</p> <p>Click the Add a New Value button.</p>



Step	Action
5.	<p>Enter the applicable name in the Inquiry Name field and click the Add button.</p>

SFS Handbook: Grantee Processing in SFS

Claim Inquiry

Search [] Clear [] Reset []

Search Criteria

Inquiry Name TEST1

Business Unit [] []

Vendor ID [] []

NYS Contract # [] []

Contract ID [] []

Claim Reference/ Invoice ID [] []

Claim ID [] []

Claim Date [] []

Claim Status [] []

> Advanced Search

Step	Action
6.	Enter the desired Business Unit, Vendor ID , and any other available search criteria if known. Note: Vendor ID is a required search field.
7.	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>
8.	Click the Search button.

Claim Details Voucher and Payment

	Business Unit	Vendor ID	Supplier Name	Claim ID	Invoice Number	Claim Date	Claim Status	Final Approval Date	NYS Cont
1	OVS01	1000006079		000007864	INVOVS01-C11419GG-1080200-007	12/15/2023	Approved		C11419GG
2	OVS01	1000006079		000007857	INVOVS01-C11418GG-1080200-002	09/14/2023	Approved		C11418GG
3	OVS01	1000006079		000007856	INVOVS01-C11418GG-1080200-001	09/14/2023	Approved		C11418GG
4	OVS01	1000006079		000007861	INVOVS01-C11419GG-1080200-004	07/27/2023	Approved		C11419GG
5	OVS01	1000006079		000007860	INVOVS01-C11419GG-1080200-003	04/18/2023	Approved		C11419GG
6	OVS01	1000006079		000007859	INVOVS01-C11419GG-1080200-002	03/31/2023	Approved		C11419GG
7	OVS01	1000006079		000006526	INVOVS01-C11114GG-1080200-020	12/27/2022	Approved		C11114GG
8	OVS01	1000006079		000006508	INVOVS01-C11113GG-1080200-014	12/15/2022	Approved		C11113GG
9	OVS01	1000006079		000006522	INVOVS01-C11114GG-1080200-015	11/22/2022	Approved		C11114GG
10	OVS01	1000006079		000006507	INVOVS01-C11113GG-1080200-013	11/01/2022	Approved		C11113GG
11	OVS01	1000006079		000006521	INVOVS01-C11114GG-1080200-014	08/26/2022	Approved		C11114GG

Save [] Notify []

SFS Handbook: Grantee Processing in SFS

Step	Action
9.	Verify Claim Details and Voucher and Payment results for the desired claim.
10.	Note: Click the Save button to save the Inquiry Name for future use.
11.	On the Claim Details tab, click on the Claim ID link for the desired claim.

Review Claims Component ×

Header Details

Business Unit: OVS01	Claim Number: 000007864	Claim Type: Conversion
Supplier Name: [REDACTED]	Contract ID: 00000000000000000000109235	Claim Initiated Dt:
Supplier ID: 100006079	Contract Max Amount: \$1,865,507.00	Claim Received Dt:
Supplier Location: MAINEPAY	Grantee Claim Reference: INVOVS01-C11419GG-1080200-007	Final Approval Dt:
Description: OVS01-C11419GG-1080200	Claim Date: 12/15/2023	
Project Name: Victim Assistance 2020	Net Days in Review: 0	
Contract Begin Dt: 10/01/2022	MIR Adjustment Date:	
Contract Expire Dt: 09/30/2025		

Bypass e Settlement Review
 Bypass Agency Voucher Approval

Claim Status: Approved Voucher ID: 00021236 Approval Step:

Line Details 1-1 of 1 > >

Line #	Line Type	Contract Period	Contract Period Amount	Requested Amount	Reviewed Amount	Net Payment Amount	Reviewed	Modified By	Modified On
1	Reimbursement	1	\$821,835.67	\$168,730.37	\$168,730.25	\$168,730.25	Yes	NY_GRCLM_CNV	01/14/2024 12:13:25AM

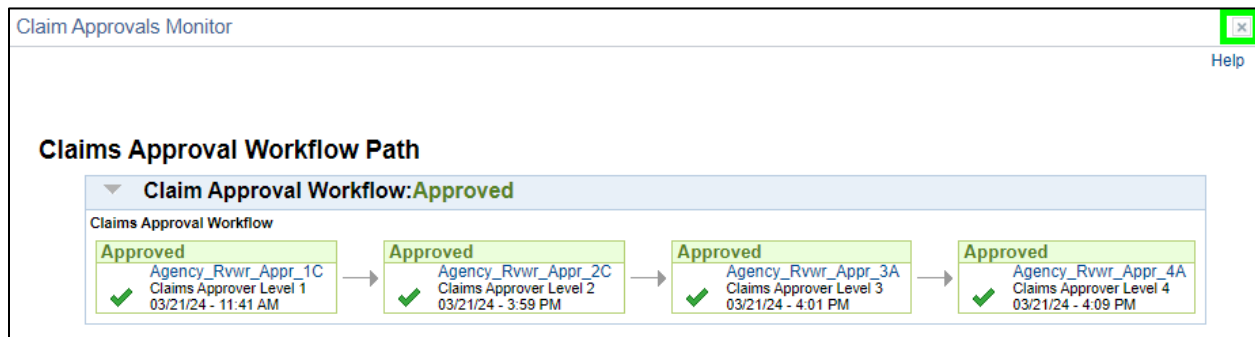
Claim Comments:
 Header Comments (0)
 Workflow Comments (0)

Add Comment:

Show to Supplier Show in Invoice

Attachments (1) View Approvals

Step	Action
12.	Click the View Approvals link.



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

SFS Handbook: Grantee Processing in SFS

Claim Review Summary

Header Details

Business Unit: OVS01 Claim Number: 000007864 Claim Type: Conversion
 Supplier Name: [REDACTED] Contract ID: 000000000000000000000000109235 Claim Initiated Dt:
 Supplier ID: 1000006079 Contract Max Amount: \$1,865,507.00 Claim Received Dt:
 Supplier Location: MAINEPAY Grantee Claim Reference: INVOVS01-C11419GG-1080200-007 Final Approval Dt:
 Description: OVS01-C11419GG-1080200 Claim Date: 12/15/2023
 Project Name: Victim Assistance 2020 Net Days in Review: 0
 Contract Begin Dt: 10/01/2022 MIR Adjustment Date:
 Contract Expire Dt: 09/30/2025

Bypass eSettlement Review
 Bypass Agency Voucher Approval Claim Status: Approved Voucher ID: 00021236 Approval Step:

Line Details

Line #	Line Type	Contract Period	Contract Period Amount	Requested Amount	Reviewed Amount	Net Payment Amount	Reviewed	Modified By	Modified On
1	Reimbursement	1	\$621,835.67	\$168,730.37	\$168,730.25	\$168,730.25	Yes	NY_GRCLM_CNV	01/14/2024 12:13:25AM

Claim Comments: Header Comments (0)
 Add Comment: Workflow Comments (0)

Show to Supplier Show in Invoice

Attachments (1) Preview Claim View Approvals

Step	Action
14.	Click the Reviewed Amount button.

Reimbursement Claim Review

Total	\$621,835.67	\$453,094.92	\$0.00	\$168,730.37	\$168,730.25	\$621,825.17
-------	--------------	--------------	--------	--------------	--------------	--------------

Match Funds

Match	Budget Category	Approved Budget	Previous Cumulative Expenditure	In-Process	Expenditures for this Report	Reviewed Amount	Current Cumulative Expenditures
1	CONTRACTUAL	\$20,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2	EQUIPMENT	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3	FRINGE	\$33,225.85	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4	OPERATING EXPENSES	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5	OTHER	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6	SALARY	\$102,831.28	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7	SPACE/PROPERTY OWN	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8	SPACE/PROPERTY RENT	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9	TRAVEL	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10	UTILITIES	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total		\$156,057.13	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

OK Cancel Line Comments (0) Attachments (2)

SFS Handbook: Grantee Processing in SFS

Step	Action
15.	Click the Line Comments button (the number in parenthesis indicates the number of comments).

Reimbursement Line Comments

[Help](#)

Line Comments

Business Unit: OVS01 Claim Number: 000007864 Line Nbr: 1 Claim Type: Reimbursement

Add Line And Return

Show to Supplier
 Show In Invoice

Line Comment History Q | < < 1 of 1 > >

Seq

Show to Supplier Created By: _____
 Show In Invoice Created On: _____ Role _____

OK Cancel

Step	Action
16.	Click the Cancel button when your review of the line comments is complete. Note: The OK button isn't active because this claim is already approved.

← | 🕒 | ❤️

Reimbursement Claim Review

	Total	\$621,835.67	\$453,094.92	\$0.00	\$168,730.37	\$168,730.25	\$621,825.17
--	-------	--------------	--------------	--------	--------------	--------------	--------------

▼ Match Funds

Match 1-10 of 10 ▼

	Budget Category	Approved Budget	Previous Cumulative Expenditure	In-Process	Expenditures for this Report	Reviewed Amount	Current Cumulative Expenditures
1	CONTRACTUAL	\$20,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2	EQUIPMENT	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3	FRINGE	\$33,225.85	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4	OPERATING EXPENSES	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5	OTHER	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6	SALARY	\$102,831.28	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7	SPACE/PROPERTY OWN	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8	SPACE/PROPERTY RENT	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9	TRAVEL	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10	UTILITIES	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Total	\$156,057.13	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

OK Cancel Line Comments (0) Attachments (2)

SFS Handbook: Grantee Processing in SFS

Step	Action
17.	Click the Attachments button (the number in parenthesis indicates the number of attachments).

Reimbursement Line Attachments

Line Attachments Help

Business Unit: OVS01 Claim Number: 000007864 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

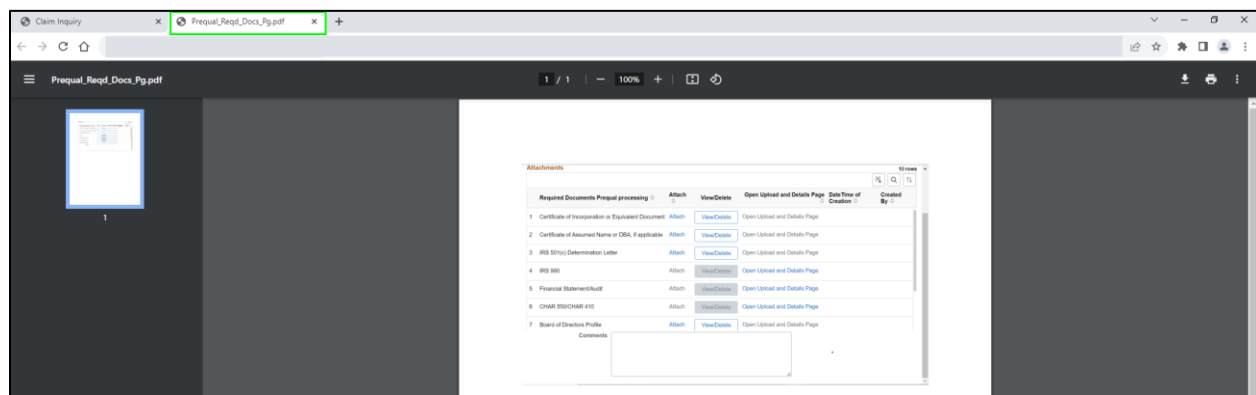
Line Attachments

File Details

File Name	Description	Show To Supplier	Show In Invoice	Created By	Created On	View Attachment
1 OBJID_187067_fupFileUpload.pdf	Supporting Documentation-Salary-Payroll supporting doc	<input type="checkbox"/>	<input type="checkbox"/>		01/14/24 4:56:32AM	View Attachment
2 OBJID_187067_fupFileUpload.pdf	Supporting Documentation-Salary-Q4-Final FCR	<input type="checkbox"/>	<input type="checkbox"/>		01/14/24 4:57:10AM	View Attachment

OK Cancel

Step	Action
18.	Click the View Attachment button for the document you would like to review.



Step	Action
19.	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: OVS01 Claim Number: 000007864 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 Add Attachment

Show To Supplier
 Show In Invoice

Line Attachments

File Details

File Name	Description	Show To Supplier	Show In Invoice	Created By	Created On	View Attachment
1 OBJID_187067_fupFileUpload.pdf	Supporting Documentation-Salary-Payroll supporting doc	<input checked="" type="checkbox"/>	<input type="checkbox"/>		01/14/24 4:56:32AM	View Attachment
2 OBJID_187067_fupFileUpload.pdf	Supporting Documentation-Salary-Q4-Final FCR	<input checked="" type="checkbox"/>	<input type="checkbox"/>		01/14/24 4:57:10AM	View Attachment

OK Cancel

Step	Action
20.	Click the Cancel button to return to the previous page. Note: The OK button isn't active because this claim is already approved.

← | 🕒 | ❤️ 🔍 Search in Menu

Reimbursement Claim Review

Total	\$621,835.67	\$453,094.92	\$0.00	\$168,730.37	\$168,730.25	\$621,825.17
-------	--------------	--------------	--------	--------------	--------------	--------------

▼ Match Funds

Match

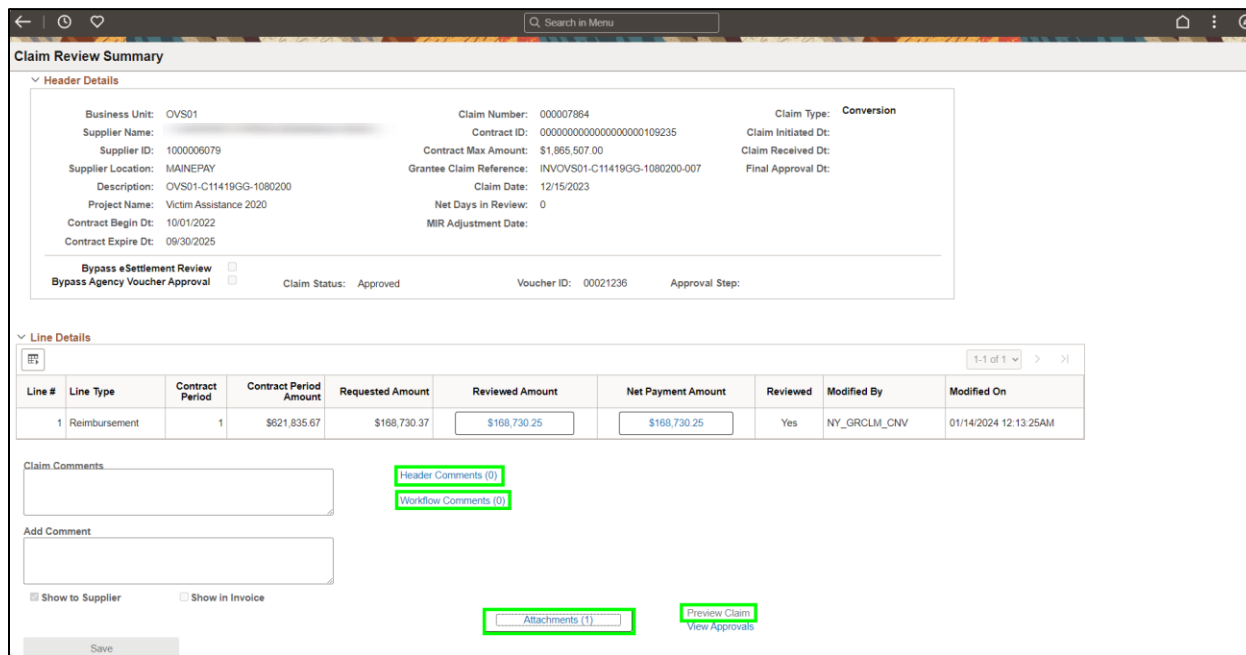
Budget Category	Approved Budget	Previous Cumulative Expenditure	In-Process	Expenditures for this Report	Reviewed Amount	Current Cumulative Expenditures
1 CONTRACTUAL	\$20,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2 EQUIPMENT	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3 FRINGE	\$33,225.85	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4 OPERATING EXPENSES	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5 OTHER	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6 SALARY	\$102,831.28	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7 SPACE/PROPERTY OWN	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8 SPACE/PROPERTY RENT	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9 TRAVEL	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10 UTILITIES	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Total	\$156,057.13	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-------	--------------	--------	--------	--------	--------	--------

OK Cancel [Line Comments \(0\)](#) [Attachments \(2\)](#)

SFS Handbook: Grantee Processing in SFS

Step	Action
21.	Click the Cancel button to return to the previous page. Note: The OK button isn't active because this claim is already approved.



Step	Action
22.	Click the Header Comments link to view any header comments for the claim.
23.	Click the Workflow Comments link to view workflow comments for the claim.
24.	Click the Attachments button to view any header attachments for the claim.
25.	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.
26.	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.

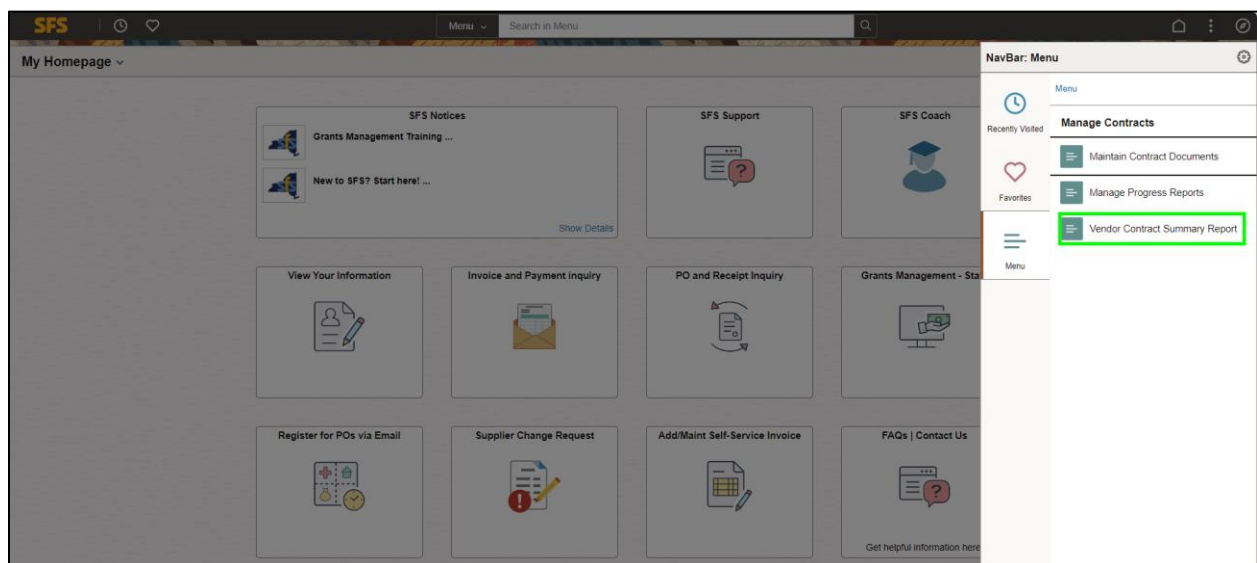
SFS role required to perform this task:

- Grants Contract Editor (NY_ES_VNDR_CNTRCT_CHANGE)

Procedure

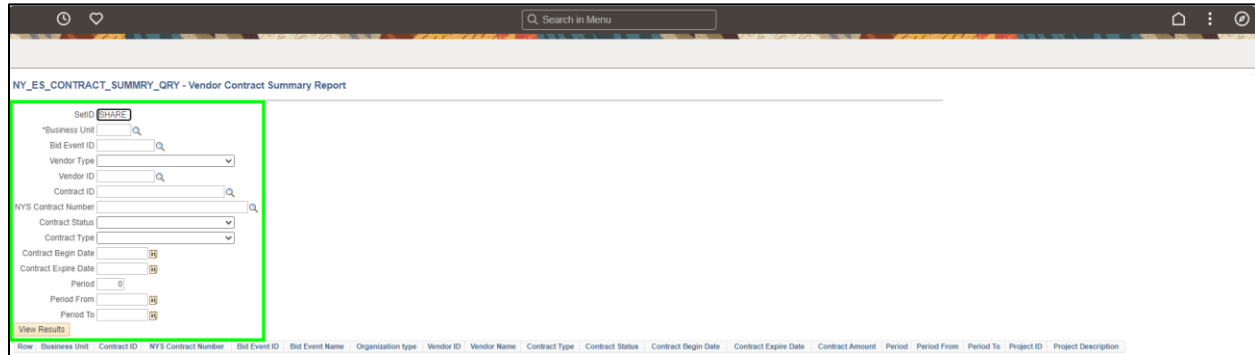
Scenario: You would like to review grant related contract and bid event data at a summary level so you will run the Vendor Contract Summary report.

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



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.

SFS Handbook: Grantee Processing in SFS

NY_ES_CONTRACT_SUMMARY_QRY - Vendor Contract Summary Report

Search in Menu

Send [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 \(2515 kb\)](#)

View All

File: 1-100 of 4044 (1) 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	0000000000000000000000001038	OMH01-C0025GG-3650000			NPFT	1000011911		FT	A	07/01/2015	06/30/2020	741891.000	1	07/01/2015	06/30/2020	0000000000062303	OMH01-REHAB-2015
2	OMH01	0000000000000000000000001039	OMH01-C00281GG-3650000			NPFT	1000003324		FT	A	07/24/2015	07/23/2020	6231250.000	1	07/24/2015	07/23/2020	0000000000062334	OMH01-RFP13-2015
3	OMH01	0000000000000000000000001830	OMH01-C00282GG-3650000			NPFT	1000011911		FT	A	10/01/2015	09/30/2020	117962.000	1	10/01/2015	09/30/2020	0000000000062304	OMH01-REHAB-2015
4	OMH01	0000000000000000000000002075	OMH01-C00284GG-3650000			NPFT	1000015486		FT	A	09/09/2015	09/08/2020	1150000.000	1	09/09/2015	09/08/2020	0000000000062305	OMH01-REHAB-2015
5	OMH01	0000000000000000000000002599	OMH01-C00254GG-3650000			NPFT	1000014581		FT	A	07/06/2015	07/05/2020	515272.000	1	07/06/2015	07/05/2020	0000000000062301	OMH01-REHAB-2015
6	OMH01	0000000000000000000000002710	OMH01-C00286GG-3650000			NPFT	1000039630		FT	A	10/05/2015	10/04/2020	3520000.000	1	10/05/2015	10/04/2020	0000000000062336	OMH01-RFP13-2015
7	OMH01	0000000000000000000000003042	OMH01-C00285GG-3650000			NPFT	1000016882		FT	A	07/27/2015	07/26/2020	5934171.000	1	07/27/2015	07/26/2020	0000000000062335	OMH01-RFP13-2015
8	OMH01	0000000000000000000000003128	OMH01-C0029GG-3650000			NPFT	1000041274		FT	A	08/20/2015	08/19/2020	9300000.000	1	08/20/2015	08/19/2020	0000000000062332	OMH01-RFP13-2015
9	OMH01	0000000000000000000000004043	OMH01-C00290GG-3650000			NPFT	1000014581		FT	A	07/24/2015	07/23/2020	9975381.000	1	07/24/2015	07/23/2020	0000000000062333	OMH01-RFP13-2015
10	OMH01	0000000000000000000000004245	OMH01-C00285GG-3650000			NPFT	1000011908		FT	A	04/27/2015	04/26/2022	1113891.000	1	04/27/2015	04/26/2022	0000000000062302	OMH01-REHAB-2015
11	OMH01	0000000000000000000000007119	OMH01-C00239GG-3650000			NPFT	1000041274		FT	A	01/01/2015	12/31/2016	84333.000	1	01/01/2015	12/31/2016	0000000000062290	OMH01-ART-2015

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.