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

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# SFS Handbook: Grantee Processing in SFS

## Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grantee Processing in SFS</td>
<td>1</td>
</tr>
<tr>
<td>Searching and Viewing Bid Events (Grant Opportunities)</td>
<td>2</td>
</tr>
<tr>
<td>Search for a Bid Event (Grant Opportunity) on the SFS Public Portal</td>
<td>2</td>
</tr>
<tr>
<td>Subscribing to Email Notifications</td>
<td>8</td>
</tr>
<tr>
<td>Subscribe to Email Notifications</td>
<td>8</td>
</tr>
<tr>
<td>Modifying Email Notifications</td>
<td>10</td>
</tr>
<tr>
<td>Modify Email Notifications</td>
<td>10</td>
</tr>
<tr>
<td>Maintaining Grantee Information</td>
<td>13</td>
</tr>
<tr>
<td>View and Update Grantee Information</td>
<td>13</td>
</tr>
<tr>
<td>Adding a Grant Contract Approver’s Name to their Profile in SFS</td>
<td>18</td>
</tr>
<tr>
<td>Managing Prequalification Applications</td>
<td>21</td>
</tr>
<tr>
<td>Enter and Submit a Prequalification Application</td>
<td>22</td>
</tr>
<tr>
<td>Responding to Bid Events (Grant Opportunities)</td>
<td>58</td>
</tr>
<tr>
<td>Respond to Bid Event Expenditure Budget Types</td>
<td>58</td>
</tr>
<tr>
<td>Respond to Bid Event Performance Budget Types</td>
<td>78</td>
</tr>
<tr>
<td>Respond to Bid Event Capital Budget Types</td>
<td>98</td>
</tr>
<tr>
<td>Using the Match Worksheet for a Bid Response</td>
<td>116</td>
</tr>
<tr>
<td>Reviewing and Approving Grant Contracts</td>
<td>122</td>
</tr>
<tr>
<td>Preview a Contract Agreement</td>
<td>122</td>
</tr>
<tr>
<td>Update Contract Period Budget and Work Plan Information and Complete Review of a Contract during Collaboration</td>
<td>127</td>
</tr>
<tr>
<td>Apply an Electronic Signature to a Contract Agreement</td>
<td>142</td>
</tr>
<tr>
<td>Complete Performance Measures for a Progress Report and Submit a Progress Report for Agency Review</td>
<td>152</td>
</tr>
<tr>
<td>Update and Re-submit a Returned Progress Report</td>
<td>161</td>
</tr>
<tr>
<td>Entering and Maintaining Grant Claims</td>
<td>165</td>
</tr>
<tr>
<td>Enter a New Claim – Advance/Initial Amount</td>
<td>166</td>
</tr>
<tr>
<td>Enter a New Claim - Reimbursement Amount</td>
<td>173</td>
</tr>
<tr>
<td>Update an Existing Claim</td>
<td>182</td>
</tr>
<tr>
<td>Update a Returned Claim</td>
<td>186</td>
</tr>
<tr>
<td>Claim Inquiry</td>
<td>194</td>
</tr>
<tr>
<td>Grantee Reports and Queries</td>
<td>206</td>
</tr>
<tr>
<td>Run the Vendor Contract Summary Report</td>
<td>206</td>
</tr>
</tbody>
</table>

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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
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.
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.
3. | From the SFS Public Portal Homepage, click the **Search for Grant Opportunities** tile.
Step | Action
--- | ---
4. | The **Search for Grant Opportunities** page is used to search for opportunities posted by agencies.

Enter the applicable search criteria in the **Search Criteria** fields.

In this example, we will search for grant opportunities by **Status** and by **Service Area**, which are the most common search methods.

5. | The **Search by Status** options are:

- **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).
  - 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.
  - 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.
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. **Note**: A list of Event IDs will populate in the Search Results based on the current search criteria.

    Click the applicable link in the Grant Opportunity column to view the abstract details.

    ![Grant Opportunity](image)

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 13.  | **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.  
In this training example, we will not click the **Log into SFS and Apply for Grant** button. |
| 14.  | **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.  
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](https://grantsmanagement.ny.gov/register-your-organization-sfs)). |

---

**Step** 15.  
**Action**: Click the **Return to Search** button to return to the **Search for Grant Opportunities** page.

**Step** 16.  
**Action**: You have successfully completed the **Search For a Bid Event (Grant Opportunity) On the SFS Public Portal** topic.
Subscribing to Email Notifications

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

Lesson Objectives:
In this lesson, you will learn how to:
- Subscribe to email notifications.

Subscribe to Email Notifications

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

Topic Objectives:
In this topic, you will learn:
- How to subscribe to email notifications

SFS 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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Navigate to <a href="#">SFS Public Portal Homepage</a>.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: Users <strong>DO NOT</strong> need to log in to SFS, as this is a public page.</td>
</tr>
<tr>
<td>2.</td>
<td><strong>Note</strong>: 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.</td>
</tr>
</tbody>
</table>
### Step | Action
---|---
3. | Click the **SignUp for Grant Notifications** tile.
### 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:**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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</thead>
<tbody>
<tr>
<td>4.</td>
<td><strong>Note:</strong> Use the <strong>Information</strong> section to enter name, organization, and email address for the contact who should receive the email notifications.</td>
</tr>
<tr>
<td>5.</td>
<td>Enter the applicable value into the <strong>First Name</strong> field.</td>
</tr>
<tr>
<td>6.</td>
<td>Enter the applicable value into the <strong>Last Name</strong> field.</td>
</tr>
<tr>
<td>7.</td>
<td>Enter the applicable value into the <strong>Organization</strong> field.</td>
</tr>
<tr>
<td>8.</td>
<td>Enter the applicable value into the <strong>Email</strong> field.</td>
</tr>
<tr>
<td>9.</td>
<td>Enter the applicable value into the <strong>Confirm Email</strong> field.</td>
</tr>
</tbody>
</table>
| 10.  | **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**.  

Click the checkbox next to the main list item to receive all notifications for that main list item. |
| 11.  | **Note:** To view description details for each Service Area, click the **Click here** link. |
| 12.  | Click the applicable **Service Area** checkboxes. |
| 13.  | Click the **Sign Up** button to sign up for email notifications for the selected service areas.  

**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. |
| 14.  | You have successfully completed the **Subscribing to Email Notifications** topic. |
SFS Handbook: Grantee Processing in SFS

- 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.

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.

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<tr>
<th>Step</th>
<th>Action</th>
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</thead>
</table>
| 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. |
| 3.   | Click the [Modify Grant Notifications](#) tile to modify contact information and/or service area preferences previously selected for email notifications. |
### SFS Handbook: Grantee Processing in SFS

#### Step 4
Enter the email address that was used to sign up for notifications, into the **Enter Email Address** field.

#### Step 5
Click the **Search** button.

#### Step 6
Your previous information and selections will populate. Update your information and/or service area preferences.

#### Step 7
To un-subscribe from all prior selected service areas, click the **Un-subscribe** checkbox.

#### Step 8
Click the **Save** button to save your changes.

#### Step 9
You have successfully completed the **Modifying Email Notifications** topic.
Maintaining Grantee Information

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

Lesson Objectives:
In this lesson, you will learn how to:
- View and Update Grantee Information
- Adding a Grantee Contract Approver's Name to their Profile in SFS

View and Update Grantee Information

Topic Description:
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.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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</thead>
<tbody>
<tr>
<td>4.</td>
<td>From the <strong>Homepage</strong> click the <strong>View Your Information</strong> tile.</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>View Grants Information</strong> tile.</td>
</tr>
<tr>
<td>6.</td>
<td>Review the information. If changes are needed, initiate a Supplier Change Request.</td>
</tr>
</tbody>
</table>
### SFS Handbook: Grantee Processing in SFS

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<th>Step</th>
<th>Action</th>
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</table>
| 7. | **Note:**  
- The **Supplier Change Request** feature in SFS allows grantees to make changes to their organization profile, addresses, contacts, banking information, and grant information.  
- Requests to change Primary Contact, Legal Business Name, Remittance Address and Banking require approval by the Office of the State Comptroller's Vendor Management Unit. |
| 8. | Click the **Home** icon to go back to the Homepage to initiate the Supplier Change Request. |

![SFS Interface](image)

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<tr>
<th>Step</th>
<th>Action</th>
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<tbody>
<tr>
<td>9.</td>
<td>Click the <strong>Supplier Change Request</strong> tile.</td>
</tr>
</tbody>
</table>
### Step | Action
--- | ---
10. | Click the **GM Info** train stop.

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.
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:
- 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.

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<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to the <a href="#">SFS Vendor Portal</a>.</td>
</tr>
<tr>
<td>2.</td>
<td>Enter your <strong>User ID</strong> and <strong>Password</strong> and select the <strong>I agree to Vendor Online Services’ Terms of Service</strong> checkbox.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Sign In</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
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</tr>
</tbody>
</table>
| 4.   | **Preferred Navigation:** Click the View Your Information tile.  
**Alternative Navigation:** From the NavBar navigate to: Menu > Maintain Supplier Information > Manage User Profiles. |
| 5.   | Click the Maintain Users tile. |
Managing Prequalification Applications

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

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

Lesson Objectives:
In this lesson, you will learn how to:
- Enter and Submit Prequalification Information

Enter and Submit a Prequalification Application

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

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.
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

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

**Step Action**

5.  
Click the Prequalification Application tile.
### Step 6

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:

- **Initiate a Prequalification Application**: allows you to start a brand-new application. This option only displays for application version 1.
  - **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.

Select the applicable option under the **Select an Activity Below** text.

### Step 7

Click the **Next** button.
Step | Action
--- | ---
8. | 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.

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.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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</thead>
<tbody>
<tr>
<td>9.</td>
<td>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.</td>
</tr>
</tbody>
</table>
10. Enter the applicable tax year end date (format MM/DD) into the **Tax Year End Date** field.
### Step 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.

### Step 12
Complete the **Questions** by clicking the applicable drop-down list and selecting either **Yes** or **No**.

**Note:** Some questions may ask for additional explanation depending on your answer. If so, add your explanation in the **Explanation/Comments** field as appropriate.

### Step 13
Complete questions shown as **List Item** by selecting the magnifying glass which is question 15 in this example.

**Note:** There are two list item questions (questions 15 and 18).
14. Select one of the **options** from **List Options**.

15. Click **Return**.
### SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>16.</td>
<td>Complete questions shown as <strong>List Item</strong> by selecting the magnifying glass which is question 18 in this example.</td>
</tr>
</tbody>
</table>

#### List Options

<table>
<thead>
<tr>
<th>List Line Number</th>
<th>Select</th>
<th>Policy Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yes</td>
<td>Annual Operating Budget</td>
</tr>
<tr>
<td>2</td>
<td>Yes</td>
<td>Policies and Procedures</td>
</tr>
<tr>
<td>3</td>
<td>Yes</td>
<td>Executive Performance and Compensation</td>
</tr>
<tr>
<td>4</td>
<td>Yes</td>
<td>Fundraising Plan</td>
</tr>
<tr>
<td>5</td>
<td>Yes</td>
<td>Internal Controls</td>
</tr>
<tr>
<td>6</td>
<td>Yes</td>
<td>Fiscal Controls</td>
</tr>
<tr>
<td>7</td>
<td>Yes</td>
<td>Annual Audit</td>
</tr>
<tr>
<td>8</td>
<td>Yes</td>
<td>Form 990</td>
</tr>
<tr>
<td>9</td>
<td>Yes</td>
<td>Program Operations and Performance Outcomes</td>
</tr>
<tr>
<td>10</td>
<td>Yes</td>
<td>Other (Please add details to Comment box at bottom of page)</td>
</tr>
</tbody>
</table>

**Return**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>17.</td>
<td>Select <strong>Yes</strong> for all the items your board reviews and/or approves.</td>
</tr>
<tr>
<td>18.</td>
<td>Click <strong>Return</strong>.</td>
</tr>
</tbody>
</table>
### Step 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.

### Step 20
Click the **Next** button.
### Step 21

The **Required Documents** page is where you will upload the required documents for the agency to review.

### Step 22

On the **Required Documents** page:
- 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.
### Step 23

To add an attachment, click the **Attach** link.
### SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>24.</td>
<td>Click the <strong>Add Attachment</strong> button.</td>
</tr>
<tr>
<td></td>
<td><img src="Image" alt="Add Attachment button" /></td>
</tr>
<tr>
<td></td>
<td><img src="Image" alt="File Attachment dialog" /></td>
</tr>
<tr>
<td>25.</td>
<td>Click the <strong>My Device</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>26.</td>
<td>Navigate to the directory location and <strong>select</strong> the applicable document for attachment.</td>
</tr>
</tbody>
</table>
### Step 27.
Click the **Open** button.
28. Click the **Upload** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>29.</td>
<td>Click the <strong>Done</strong> button.</td>
</tr>
</tbody>
</table>
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.
Step 31. Click the **Done** button.

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

### Step 33. Action
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.
### Step 35

When you are finished viewing attachments, click the **Done** button.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>35.</td>
<td>When you are finished viewing attachments, click the <strong>Done</strong> button.</td>
</tr>
</tbody>
</table>

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

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

- **Cancel**: Allows you to leave the page and if you attempted to make edits they are not saved
- **Done**: Allows you to leave the page and edits are saved
- **X**: Closes out the page without saving changes
36. **Note:** Not for Profit Organizations must upload IRS 990 information. To do this, use the **Attach with Additional Date Details** link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>37.</td>
<td>Click the <strong>Attach with Additional Date Details</strong> link.</td>
</tr>
</tbody>
</table>

**Step**

38.

**Action**

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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>39.</td>
<td>Click the <strong>Add Attachment</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>40.</td>
<td>Click the My Device button.</td>
</tr>
<tr>
<td>41.</td>
<td>Navigate to the directory location and select the applicable document for attachment.</td>
</tr>
</tbody>
</table>
Step 42. Click the Open button.

Open
### Step 43.
Click the **Upload** button.

**Upload**

### Step 44.
Click the **Done** button.

**Done**
### SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>45.</td>
<td>Enter the applicable date (format MM/DD/YYYY) in the <strong>Tax Year Begin Date</strong> field or click the <strong>Calendar</strong> icon to select the date.</td>
</tr>
</tbody>
</table>

#### Attatch with Additional Date Details
- **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.

<table>
<thead>
<tr>
<th>Text_Prelim_Attachment.pdf</th>
<th>Application ID</th>
<th>Version Number</th>
<th>SetID</th>
<th>Supplier ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text_Prelim_Attachment.pdf</td>
<td>000016446</td>
<td>1</td>
<td>S145CE</td>
<td>1000014501</td>
</tr>
</tbody>
</table>

### Step 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.

#### Attatch with Additional Date Details
- **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.

<table>
<thead>
<tr>
<th>Text_Prelim_Attachment.pdf</th>
<th>Application ID</th>
<th>Version Number</th>
<th>SetID</th>
<th>Supplier ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text_Prelim_Attachment.pdf</td>
<td>000016446</td>
<td>1</td>
<td>S145CE</td>
<td>1000014501</td>
</tr>
</tbody>
</table>
## Step 47
Click the **Done** button.

---

## Step 48
Follow the same process to add attachments for any additional rows with the **Attach with Additional Date Details** link.
Step 49.
Click the **Next** button.
### SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>50.</td>
<td>Click the <strong>Add Contacts</strong> 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.</td>
</tr>
</tbody>
</table>

**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.

![Add New Contact](image)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>51.</td>
<td>Enter the applicable value in the <strong>Description</strong> field.</td>
</tr>
</tbody>
</table>

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**.
### Step 52
Enter the applicable value in the **First Name** field.

### Step 53
Enter the applicable value in the **Last Name** field.

### Step 54
Enter the applicable value in the **Email Id** field.

### Step 55
Enter the applicable value in the **Telephone** field.
SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>56.</td>
<td>The Title, Fax Number, and Contact Type fields are optional, and can be populated or left blank.</td>
</tr>
</tbody>
</table>

![Add New Contact](image)

**Step 57.** Click the Done button.

![Prequalification Application](image)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>58.</td>
<td>Multiple contacts can be added. If needed, click the <strong>Add Contacts</strong> button and follow steps 51-57 to add additional prequalification contacts from your organization.</td>
</tr>
<tr>
<td>59.</td>
<td>Click the <strong>Next</strong> button.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 60.  | 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.  
To certify, click the **Attestation** toggle option to **Yes**. |
|      | **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**. |
61. If you are interested in reviewing all the information that you entered on the application, before you submit, click the **Review** button. In this example, we will not click the review button.

**Note:** This is an optional step.

62. **Note:** If you need to update information entered on the previous sections, select the applicable section from the list on the left side of the page and make the update(s).

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

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

**Lesson Objectives:**
In this lesson, you will learn how to:
- Respond to Bid Event Expenditure Budget Types
- Respond to Bid Event Performance Budget Types
- Respond to Bid Event Capital Budget Types
- Using the Match Worksheet for a Bid Response

**Respond to Bid Event Expenditure Budget Types**
SFS Handbook: Grantee Processing in SFS

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

**Topic Objectives:**
In this topic, you will learn:
- How to respond to Bid Event Expenditure Budget Types

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

   **Note**: You must log in to the SFS Vendor Portal to respond to a bid event.

2. | Click the **Bid Event Search** tile.
### Step 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.

### Step 4
Click the **Search** button.

### Step 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.
## Step 6
Click the **Bid on Event** button.

### Event Details
- **Event Name:** Test Event
- **Event ID:** Test001
- **Event Type:** Test Event
- **Start Date:** 01/01/2023 1:56 PM EST
- **End Date:** 01/01/2023 2:56 PM EST

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

## Step 8
Click the **Additional Bid Info** link.

## Additional Bid Response fields
- **Organization Type:** Not-For-Profit
- **Taxpayer Identification Number:**
- **Questions & Answers Post Type:**
- **Contract Type:**
- **Length:** N/A
- **Questions & Answers Upload:**
- **Questions & Answers Narrative:**
- **Letter of Intent:**
- **Provide a Link:**
- **Questions & Answers Link:**
- **Q&A:**

## Step 9
Review the **Additional Bid Info**.
Step | Action
--- | ---

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: 0.00 USD

---

**Step 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.
### Step 11.

Click the **OK** button after viewing the instructions, attachments, and comments.
### SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.</td>
<td>Use the scrollbar to navigate to the Step 1: Answer General Event Questions section.</td>
</tr>
<tr>
<td>13.</td>
<td>If applicable, enter your Organization Website in the Organization Website field. This field is optional and not required.</td>
</tr>
</tbody>
</table>
| 14.  | Under the Bidder Contact Information, enter the following information:  
  - Name  
  - Telephone  
  - Email  
  
  **Note**: The contact listed should be the person/people within the organization who can be contacted with questions about the bid response. |
| 15.  | Click the Site/Project Address link. |

#### Bid Response address fields

![Bid Response address fields](image)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 16.  | Enter Address Details, including the following information:  
  - Address Line 1  
  - Address Line 2 (if applicable)  
  - City  
  - Postal Code  
  - State |
Step | Action
---|---
**Note:** The **Site/Project Address** is where the grant will be used, or funds will be spent.

17. When you have finished entering address details, click the **OK** button.

![Image of SFS Handbook: Grantee Processing in SFS](image)

**Step** | **Action**
---|---
18. Review and respond to **Event Questions**. Those that are flagged as Required (*) must be responded to in order to submit a bid response.

**Note:** The ability to add a Comment/Attachment will vary based on the question.

![Image showing Event Details](image)
19. Click the **Save for Later** button.

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

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.

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.
Step | Action
--- | ---
25. | 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.

In this example, we will enter budget information for the **Salary** and **Fringe** budget categories.

26. | Under the **Period Budget Summary** section, click on **Category Details** icon for the **Salary** budget category.

**Note:** Where the icon cannot be clicked, the agency has not checked the **Available in Grant** checkbox above.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 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 **Position Title** field.  
In this example, we will enter **Narcan Trainer** in the **Position Title** field. You may need to scroll to see this field. |
| 31.  | Enter the applicable value into the **Annualized Salary per Position** field. |
In this example, we will enter **50,000** in the **Annualized Salary per Position** field.

32. Enter the applicable value into the **STD Work Week (HRS)** field.

   In this example, we will enter **40** in the **STD Work Week (HRS)** field.

33. Enter the applicable value into **% of Effort Funded** field.

   In this example, we will enter **100** in the **% of Effort Funded** field.

34. Enter the applicable value into the **# of Months Funded** field.

   In this example, we will enter **12** in the **# of Months Funded** field.

35. Enter the applicable value into the **Narrative** field. **Note:** The narrative could be additional information for the agency or could be used to summarize the changes you made.

   In this example, we will not enter a narrative for the salary budget category.

36. Click the **OK** button.

37. Under the Period Budget Summary section, click on **Category Details** icon for the **Fringe** budget category.

38. Leave the **Type/Description** field blank.

39. Enter the applicable value into the **Grant Funds** field.

   In this example, we will enter **10,000** in the **Grant Funds** field.

40. Enter the applicable value into the **Match Funds** field.

   In this example, we will leave this field blank.

41. Enter the applicable value into the **Other Funds** field.

    **Note:** This field may be greyed out if it was not selected on the bid event; if greyed out, move on to the next step.

42. Enter the applicable value into the **Narrative** field.

   In this example, we will enter **Fringe Rate at 20%** in the **Narrative** field.

43. Click the **OK** button.
44. Click the **Save** button.

45. Click the **Back** button.

46. Click the **Work Plan Properties** link.
### Step 47
Review the Work Plan Header information and verify the Allow Bidder Defined Objectives and Tasks is selected.

### Step 48
**Note:** If the Allow Bidder Defined Objectives & Tasks box is checked and the Maximum Number of Objectives, Tasks, and Performance Measures have not already been entered, then you can add new objective, tasks, and performance measures if needed.

### Step 49
Enter the applicable value into the Project Summary field if not already entered by the agency.

In this example, we will enter Help reduce drug deaths in the Project Summary field.

### Step 50
In this example, we will add additional rows in the Objectives >> Tasks >> Performance Measures section. **Note:** The First Objective with the underlying Task and Performance Measure in the list was entered by the agency.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Click on the <strong>Objective</strong> row to add additional objectives.</td>
</tr>
<tr>
<td>51.</td>
<td>Click the <strong>+ Objective</strong> button.</td>
</tr>
</tbody>
</table>
| 52.  | 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. |
| 53.  | 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. |
| 54.  | Select the **Objective** row where the task will be added. |
| 55.  | Click **+ Task** button. |
| 56.  | Enter the applicable information on the **Task** row, in the **Name** field.  
On the **Task** row, in this example we will enter **Distribute 74 narcan kits to trained community members** in the **Name** field. |
| 57.  | Enter the applicable information on the **Task** row, in the **Description** field.  
On the **Task** row, in this example we will enter **Distribute 74 narcan kits to trained community members** in the **Description** field. |
Step | Action
---|---
58. | Select the **Task** row where the performance measure will be added.
59. | Click **+ Performance Measure** button.
60. | 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.

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

**Note**: Available Performance Measure options are:
- Attachment
- Date
- Numeric
- Text/Comment
### Step 64
Enter the applicable value into the **Numeric (Target/Goal)** field.

In this example, we will enter **100** in the **Numeric (Target/Goal)** field.

### Step 65
Click the **Save** button.

### Step 66
Click the **Back** button.

---

**Step** | **Action**
--- | ---
67. | Click the **Return to Bid Response** link.

---

*Step 2: Enter Line Bid Responses*

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

**Lines**

<table>
<thead>
<tr>
<th>Line</th>
<th>Period</th>
<th>Item ID</th>
<th>Description</th>
<th>Unit</th>
<th>Your Unit Bid Price</th>
<th>Your Total Bid Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Period Details</td>
<td>Line 1</td>
<td></td>
<td>EA</td>
<td><strong>20000</strong></td>
<td></td>
</tr>
</tbody>
</table>

---

*Event Comments and Attachments*

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.
Step | Action
--- | ---
68. | **Note:** The amount entered in the *Your Unit Bid Price* field must equal the total Grant Funds Requested amount for the period, in order to submit the bid response.
   
   In this example, we will enter **20,000** in the *Your Unit Bid Price* field.
69. | When you are ready to submit your bid response, click the *Submit Bid* button.

**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.
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 1

**Preferred Navigation:** Click the **Grant Management - State** tile.

**Alternative Navigation:** From the **Navbar** navigate to: **Menu > Manage Events and Place Bids > View Events and Place Bids**

**Note:** You must log in to the SFS Vendor Portal to respond to a bid event.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Bid Event Search</strong> tile.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Search Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event ID</td>
</tr>
<tr>
<td>---------</td>
</tr>
<tr>
<td>EVT000008</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Enter the applicable search criteria in the <strong>Search Criteria</strong> fields.</td>
</tr>
<tr>
<td></td>
<td>In this example, select the <strong>Search by Status</strong> field drop-down list and click <strong>Available</strong> from the list.</td>
</tr>
</tbody>
</table>

| 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 **EVT0000082** link to initiate a bid response. |
Step | Action
--- | ---
6. | Click the **Bid on Event** button.

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

## Additional Bid Response fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Type</td>
<td>Not-For-Profit</td>
</tr>
<tr>
<td>Bidders Conference Application Workshop</td>
<td>HSBC</td>
</tr>
<tr>
<td>Contract Type</td>
<td>Fixed</td>
</tr>
<tr>
<td>Length</td>
<td>N/A</td>
</tr>
<tr>
<td>Narrative</td>
<td>N/A</td>
</tr>
<tr>
<td>Questions &amp; Answers Post Type</td>
<td>100%</td>
</tr>
<tr>
<td>Questions &amp; Answers Upload</td>
<td>N/A</td>
</tr>
<tr>
<td>Questions &amp; Answers Narrative</td>
<td>N/A</td>
</tr>
<tr>
<td>Letter of Intent</td>
<td>N/A</td>
</tr>
<tr>
<td>Provide a Link</td>
<td>N/A</td>
</tr>
</tbody>
</table>

## Step 9
- **Action**: 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.

<table>
<thead>
<tr>
<th>Line</th>
<th>Period</th>
<th>Item ID</th>
<th>Description</th>
<th>Unit</th>
<th>Your Unit Bid Price</th>
<th>No Bid</th>
<th>Your Total Bid Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>LINE 1</td>
<td>EA</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Event Comments and Attachments**

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

- Submit Bid
- Save for Later
- Validate Entries

Return to Event Search
### SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>Select the <strong>Events Comments and Attachments</strong> 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.</td>
</tr>
</tbody>
</table>

### Event Comments and Attachments

**Business Unit**: OIH01  
**Event ID**: EVT0000002  
**Event Round**: 1  
**Event Version**: 1

#### View Event Attachments

<table>
<thead>
<tr>
<th>Attached File</th>
<th>Attachment Description</th>
<th>Event RFx Doc</th>
<th>Upload</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructions_document.pdf</td>
<td></td>
<td></td>
<td></td>
<td>View</td>
</tr>
<tr>
<td>Reporting_Template.pdf</td>
<td></td>
<td></td>
<td></td>
<td>View</td>
</tr>
</tbody>
</table>

#### Add New Attachments

<table>
<thead>
<tr>
<th>Attached File</th>
<th>Attachment Description</th>
<th>Upload</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructions_document.pdf</td>
<td></td>
<td></td>
<td>View</td>
</tr>
<tr>
<td>Reporting_Template.pdf</td>
<td></td>
<td></td>
<td>View</td>
</tr>
</tbody>
</table>

#### Comments

Add New Comments

Please review attached instructions before responding to bid event.

[...]

**OK**  
**Cancel**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.</td>
<td>Click the <strong>OK</strong> button after viewing the instructions, attachments and comments.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>12.</td>
<td>Use the scrollbar to navigate to the Step 1: Answer General Event Questions section.</td>
</tr>
<tr>
<td>13.</td>
<td>If applicable, enter your Organization Website in the Organization Website field. This field is optional and not required.</td>
</tr>
</tbody>
</table>
| 14.  | Under the Bidder Contact Information, enter the following information:  
- Name  
- Telephone  
- Email  

**Note:** The contact listed should be the person/people within the NFP who can be contacted with questions about the bid response |
| 15.  | Click the Site/Project Address link. |
16. **Enter Address Details**, including the following information:
   - **Address Line 1**
   - **Address Line 2** (if applicable)
   - **City**
   - **Postal Code**
   - **State**

**Note:** The **Site/Project Address** is where the grant will be used, or funds will be spent.

17. When you have finished entering address details, click the **OK** button.
Step 18. Review and respond to Event Questions. Those that are flagged as Required (*) must be responded to in order to submit a bid response.

Note: The ability to add a Comment/Attachment will vary based on the question.

Step 19. Click the Save for Later button.
## Step 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**: 0.000 USD

<table>
<thead>
<tr>
<th>Line</th>
<th>Period</th>
<th>Item ID</th>
<th>Description</th>
<th>Unit</th>
<th>Your Unit Bid Price</th>
<th>Your Total Bid Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Period Details - 1</td>
<td>Line 1</td>
<td>EA</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Step 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 22
Click the **Budget properties** link.
### Step 23
Review the **Budget Header Information**. This section was completed by the agency.

### Step 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.
Step 25. Under **Budget Category Property** section, click **Plus Sign (+)** to add a new row.
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. | **Note:**
   - 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.

In this example, we will not select these two options.

29. | Scroll down to the **Period Budget Summary** section and click on the **Category Details** icon for the first budget category.
### Step 30.
Leave the **Type/Description** field blank.

### Step 31.
Enter the applicable value into the **Grant Funds** field.

In this example, we will enter **10,000** in the **Grant Funds** field.

### Step 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.

### 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.

   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.
Step | Action
--- | ---
43. | Click the **Save** button.
44. | Click the **Back** button.

Step | Action
--- | ---
45. | Click the **Work Plan Properties** link.
### Step 46
Review the **Work Plan Header** information and verify the **Allow Bidder Defined Objectives and Tasks** is selected.

### Step 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.

### Step 48
Enter the applicable value into the **Project Summary** field.

### Step 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.

### Step 50
Click the **+ Objective** button.

### Step 51
On the **Objective** row, enter the applicable value in the **Name** field.

### Step 52
On the **Objective** row, enter the applicable value in the **Description** field.
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.

---

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.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>60.</td>
<td>On <strong>Performance Measure</strong> row, enter the applicable value in the <strong>Description</strong> field.</td>
</tr>
<tr>
<td>61.</td>
<td>Click the arrow to the right of the <strong>More Details</strong> tab to expand the view and see all fields.</td>
</tr>
</tbody>
</table>
| 62.  | **Note:** Available Performance Measure options are:  
- Attachment  
- Date |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Numeric</td>
</tr>
<tr>
<td></td>
<td>• Text/Comment</td>
</tr>
<tr>
<td></td>
<td>• Yes/No</td>
</tr>
</tbody>
</table>

In this example, on the **Performance Measure** row, we will select the **Performance Measure Response Type** drop-down list and select the **Numeric** option.

63. Enter the applicable value into the **Numeric (Target/Goal)** field.

In this example, we will enter **100** in the **Numeric (Target/Goal)** field.

64. Click the **Save** button.

65. Click the **Back** button.

66. Click the **Return to Bid Response** link.
### 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.

### Step 1

**Preferred Navigation:** Click the **Grant Management - State** tile.

**Alternative Navigation:** From the **Navbar** navigate to: Menu > Manage Events and Place Bids > View Events and Place Bids

**Note:** You must log in to the SFS Vendor Portal to respond to a bid event.
2. Click the **Bid Event Search** tile.

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.
### Step 6
Click the **Bid on Event** button.

**Bid on Event**

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

---

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 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:** 0.00 USD

---

<table>
<thead>
<tr>
<th>Line</th>
<th>Period</th>
<th>Item ID</th>
<th>Description</th>
<th>Unit</th>
<th>Your Unit Bid Price</th>
<th>No Bid</th>
<th>Your Total Bid Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>LINE 1</td>
<td></td>
<td>EA</td>
<td></td>
<td></td>
<td>Bid</td>
</tr>
</tbody>
</table>

---

**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.

---

9. 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.
Step 11. Click the **OK** button after viewing the instructions, attachments, and comments.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.</td>
<td>Use the scrollbar to navigate to the Step 1: Answer General Event Questions section.</td>
</tr>
<tr>
<td>13.</td>
<td>If applicable, enter your Organization Website in the Organization Website field. This field is optional and not required.</td>
</tr>
</tbody>
</table>
| 14.  | Under the Bidder Contact Information, enter the following information:  
  - Name  
  - Telephone  
  - Email  
  
  **Note:** The contact listed should be the person/people within the NFP who can be contacted with questions about the bid response. |
| 15.  | Click the Site/Project Address link. |

**Bid Response address fields**

![Address Details](image)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 16.  | Enter Address Details, including the following information:  
  - Address Line 1  
  - Address Line 2 (if applicable)  
  - City  
  - Postal Code |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>17.</td>
<td>When you have finished entering address details, click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>

**Note:** The **Site/Project Address** is where the grant will be used, or funds will be spent.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 18.  | Review and respond to **Event Questions**. Those that are flagged as Required (*) must be responded to in order to submit a bid response.  

**Note:** The ability to add a Comment/Attachment will vary based on the question. |
Step | Action
--- | ---
19. | Click the **Save for Later** button.

The bid is not complete. (18068,342)

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 button highlighted](image)

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

---

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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>22.</td>
<td>Click the <strong>Budget properties</strong> link.</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>25.</td>
<td>Under the Period Budget Summary section, click on View All icon to show all budget categories.</td>
</tr>
<tr>
<td></td>
<td>In this example, we will enter budget information for the Scoping &amp; Pre-development and Design budget categories.</td>
</tr>
<tr>
<td>26.</td>
<td>Under the Period Budget Summary section, click on Category Details icon for the Scoping &amp; Pre-development budget category.</td>
</tr>
<tr>
<td></td>
<td>Note: Where the icon cannot be clicked, the agency has not checked the Available in Grant checkbox above.</td>
</tr>
</tbody>
</table>
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.
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 leave this field blank.
<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>32.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>33.</td>
<td>Under the Period Budget Summary section, click on <strong>Category Details</strong> icon for the <strong>Design</strong> budget category.</td>
</tr>
<tr>
<td>34.</td>
<td>Leave the <strong>Type/Description</strong> field blank.</td>
</tr>
<tr>
<td>35.</td>
<td>Enter the applicable value into the <strong>Grant Funds</strong> field. In this example, we will enter <strong>10,000</strong> in the <strong>Grant Funds</strong> field.</td>
</tr>
<tr>
<td>36.</td>
<td>Enter the applicable value into the <strong>Match Funds</strong> field. In this example, we will leave this field blank.</td>
</tr>
</tbody>
</table>
| 37.  | 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. |
| 38.  | 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. |
| 39.  | Click the **OK** button. |
### Step 40
Click the **Save** button.

### Step 41
Click the **Back** button.

### Step 42
Click the **Work Plan Properties** link.
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.

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.

47. | Click on the Objective row to add additional objectives.
48. | Click the + Objective button.
49. | On the Objective row, enter the applicable value in the Name field.

---

**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.
47. | Click on the Objective row to add additional objectives.
48. | Click the + Objective button.
49. | On the Objective row, enter the applicable value in the Name field.

---

**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.
47. | Click on the Objective row to add additional objectives.
48. | Click the + Objective button.
49. | On the Objective row, enter the applicable value in the Name field.

---

**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.
47. | Click on the Objective row to add additional objectives.
48. | Click the + Objective button.
49. | On the Objective row, enter the applicable value in the Name field.
### Step 50
Select the **Objective** row where the task will be added.

### Step 51
Click the **+ Task** button.

### Step 52
On the **Task** row, enter the applicable value in the **Name** field.

### Step 53
On the **Task** row, enter the applicable value in the **Description** field.

### Step 54
Select the **Task** row where the performance measure will be added.

### Step 55
Click the **+ Performance Measure** button.

### Step 56
On the **Performance Measure** row, enter the applicable value in the **Name** field.
### Step 57.
On **Performance Measure** row, enter the applicable value in the **Description** field.

![Image of SFS Handbook interface showing Performance Measure row]

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

![Image of SFS Handbook interface showing expanded More Details]

### Step 59.
**Note:** Available Performance Measure options are:
- Attachment
- Date
### Step 60
**Action**
- Enter the applicable value into the **Numeric (Target/Goal)** field.

In this example, we will enter **100** in the **Numeric (Target/Goal)** field.

### Step 61
**Action**
- Click the **Save** button.

### Step 62
**Action**
- Click the **Back** button.

### Step 63
**Action**
- Click the **Return to Bid Response** link.
### 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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td><strong>Preferred Navigation:</strong> Click the <strong>Grant Management - State</strong> tile. <strong>Alternative Navigation:</strong> From the <strong>NavBar</strong> navigate to: Menu &gt; Manage Events and Place Bids &gt; View Events and Place Bids</td>
</tr>
</tbody>
</table>

**Note:** You must log in to the SFS Vendor Portal to respond to a bid event.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Bid Event Search</strong> tile.</td>
</tr>
</tbody>
</table>

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 **EVT0000082** link to update a bid response.
### Step 6
Click on **My Bids In Process** link to view your in-process response to this bid event.

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

Step 9. Click the Budget Properties link.
**Step** | **Action**  
--- | ---  
10. | Click the **Match Worksheet** link.  

**Include Match Worksheet**  

**Source of Matching Funds** | **Describe Match source** | **Form of Documentation Required** | **Match Total**  
--- | --- | --- | ---  
1 | Match Type | |  

Match Worksheet Detail Total: 0.00  
Budget Detail Match Total: 0.00  

**Step** | **Action**  
--- | ---  
11. | Enter applicable value in the **Source of Match Funds** field.
### SFS Handbook: Grantee Processing in SFS

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

### 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.
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.
### SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | **Preferred Navigation:** Click the **Grant Management - State** tile.  
**Alternative Navigation:** From the **NavBar** navigate to: Menu > Manage Contracts > Maintain Contract Documents  
**Note:** You must log in to the SFS Vendor Portal to view a grant contract. |
<p>| 2.   | Click the <strong>Grant Contracts Search</strong> tile. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 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.  
**Note:** If you do not know any criteria, you can leave the search criteria in the Document Search section blank. |
| 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. |
| 6.   | Click the applicable **Contract ID** from the search results. |
Step 7. Click the View Document button to review the Contract Agreement document.
When you are finished reviewing the Contract Agreement document, click the **Close (X)** button.

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:**
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.
## SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td><strong>Preferred Navigation:</strong> Click the <strong>Grant Management - State</strong> tile. <strong>Alternative Navigation:</strong> From the <strong>NavBar</strong> navigate to: Menu &gt; Manage Contracts &gt; Maintain Contract Documents</td>
</tr>
</tbody>
</table>

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

![Image of SFS interface](image_url)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Grant Contracts Search</strong> tile.</td>
</tr>
</tbody>
</table>

![Image of Grant Contracts Search](image_url)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Enter the agency's business unit into the <strong>Business Unit</strong> field or click the magnifying glass to search for the information.</td>
</tr>
</tbody>
</table>
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.

6. Click the applicable Contract ID link from the search results under the Contract Document column.
Step 7.

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.

**Note:** This is an optional step.
### Step 8

When you are finished reviewing the Contract Agreement document, click the **Close (X)** button.
**Step** | **Action**
---|---
9. | Review comments in the **Comments History** field for any specific instructions from the agency prior to navigating to the budget/work plan pages.
10. | Click the applicable **Period** link under the **Budget Detail Period** heading to review and edit the budget period detail information.
### Step 11

**Note:** When the **Available for Supplier Updates** option is selected, the grantee can update the budget information. When de-selected, the grantee can only view the budget information.
Step | Action
---|---
12. | 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 Details** fields will vary based on the Budget Category.
13. In this example, we are updating budget category detail information for the Fringe budget category and Expenditure budget type.

14. Make the applicable updates to the budget category detail information.
   
   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.

15. The Narrative field should be used to provide additional details about the information entered for a specific budget category.
   
   In this example, we will enter Increased the grant funds amount so total grant funds requested equals the period amount in the Narrative field.

16. **Note:**
   - The above fields are only available when the Agency who collaborated on the contract has indicated that they are applicable for the contract. If this is not the case, these fields will be greyed out.
   - The Total Funds will automatically calculate based on the sum of the Grant Funds, Match Funds, and Other Funds.

17. When you are finished entering the Budget Category Detail information, click the OK button.
### Step 18
Click the **Apply** button to save your changes.

### Step 19
Click the **OK** button to return to the Document Management page.
20. Click the applicable Period link under the Work Plan Period heading to review and edit the work plan information.

**Work Plan Period**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>21.</td>
<td><strong>Note</strong>: When the <strong>Available for Supplier Updates</strong> option is selected, the vendor can update the work plan information. When de-selected, the vendor can only view the work plan information.</td>
</tr>
<tr>
<td>22.</td>
<td>If the <strong>Allow Supplier Defined Objectives &amp; Tasks</strong> 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. Select the checkbox for the <strong>Objective</strong>, <strong>Task</strong>, and/or <strong>Performance Measure</strong> where the new objective, task, and/or performance measure will be inserted and then select the <strong>+ Objective</strong> button to add a new objective. Select the <strong>+ Task</strong> button to add a new task and select the <strong>+ Perf Measure</strong> 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.</td>
</tr>
<tr>
<td>23.</td>
<td>Click the <strong>Work Plan Overview Report</strong> link to view the work plan information in a PDF format, if you are interested in viewing this information. <strong>Note</strong>: This is an optional step.</td>
</tr>
<tr>
<td>24.</td>
<td>When you are finished reviewing the <strong>Work Plan Overview Report</strong> document, click the <strong>Close (X)</strong> button.</td>
</tr>
</tbody>
</table>
Step 25. Click the More Details tab.

Step 26. In this example, we are updating the target value for the second performance measure. We will change the Numeric (Target/Goal) field to 50.

Step 27. Click the Apply button to save any changes.

Step 28. Click the OK button to return to the Document Management page.
### Step 29
When you have finished reviewing the Budget Period information, select the **Budget Period Mark as Reviewed** checkbox to update the **Budget Detail Status** to Reviewed.

### Step 30
When you have finished reviewing the Work Plan Period information, select the **Work Plan Period Mark as Reviewed** checkbox to update the **Work Plan Detail Status** to Reviewed.

### Step 31
Enter any comments for the agency in the **Comments** field.

**Note:** The **Comments** field could be used to summarize the changes you made.

### Step 32
**Note:**
- To upload and attach documents to a contract, click the **Add Additional Attachments** link.
- Vendors can only add attachments to their contracts during collaboration.

### Step 33
Click the **Approve** button to indicate your review is complete and to return the contract to the agency.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>34.</td>
<td>Click the <strong>Yes</strong> button to continue marking this contract as reviewed.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Click the <strong>No</strong> button to cancel this action.</td>
</tr>
<tr>
<td>35.</td>
<td><strong>Note:</strong></td>
</tr>
<tr>
<td></td>
<td>• If you want to return the contract back to the agency contract manager for updates, click the <strong>Deny</strong> button.</td>
</tr>
<tr>
<td></td>
<td>• If you want to return the contract to the previous step in the workflow, click the <strong>Pushback</strong> button.</td>
</tr>
</tbody>
</table>

### 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.
Step | Action
--- | ---
1. | **Preferred Navigation**: Click the **Grant Management – State** tile.

**Alternative Navigation**: From the **NavBar** navigate to: **Menu > Manage Contracts > Maintain Contract Documents**

**Note**: You must log in to the SFS Vendor Portal to approve a grant contract.

2. | Click the **Grant Contracts Search** tile.
### Step 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.

**Note:** If you do not know any criteria, you can leave the search criteria in the **Document Search** section blank.

### Step 4
To view grant contracts that are pending review and approval, 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.

### Step 5
Click the **Search** button.
6. Click the applicable **Contract ID** from the search results.
### SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Click the <strong>View Contract Agreement</strong> button to view the Contract Agreement in a new browser window.</td>
</tr>
<tr>
<td>8.</td>
<td><strong>Note</strong>: 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 <a href="https://esupplier.sfs.ny.gov/psp/fscm/SUPPLIER/?cmd=login">https://esupplier.sfs.ny.gov/psp/fscm/SUPPLIER/?cmd=login</a>” and click the <strong>Done</strong> button. Following this, click the <strong>View Contract Agreement</strong> button again to view the new browser window.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>9.</td>
<td>When you are finished reviewing the Contract Agreement document, click the <strong>Close (X)</strong> button.</td>
</tr>
</tbody>
</table>

![Image of the Contract Agreement document]
### Step 10

**Action**

Click the **Approve** button.

[Approve button]
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 13

**Action**: Click the **View Contract Agreement** button.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>13.</td>
<td>Click the <strong>View Contract Agreement</strong> button.</td>
</tr>
</tbody>
</table>

**View Contract Agreement**

### Step 14

**Action**: The **Title**, **Date**, and **Signature of the Approval** display on the Contract Agreement.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>14.</td>
<td>The <strong>Title</strong>, <strong>Date</strong>, and <strong>Signature of the Approval</strong> display on the Contract Agreement.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>15.</td>
<td>Click the <strong>Close (X)</strong> button.</td>
</tr>
</tbody>
</table>
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.

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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td><strong>Preferred Navigation:</strong> Click the <strong>Grant Management - State</strong> tile. <strong>Alternative Navigation:</strong> From the <strong>NavBar</strong> navigate to: Menu &gt; Manage Contracts &gt; Manage Progress Reports <strong>Note:</strong> You must log in to the SFS Vendor Portal to submit a progress report.</td>
</tr>
</tbody>
</table>
### SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Progress Report Search</strong> tile.</td>
</tr>
</tbody>
</table>

#### Manage Progress Reports

<table>
<thead>
<tr>
<th>Contractor</th>
<th>Contract</th>
<th>Period</th>
<th>Report Description</th>
<th>Due Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>OGS01-999888-1010208</td>
<td>0000000000000000001053/7</td>
<td>1</td>
<td>Period 1 - Report 1</td>
<td>6/20/2013</td>
<td>Pend</td>
</tr>
<tr>
<td>OGS01-999888-1010208</td>
<td>0000000000000000001053/7</td>
<td>2</td>
<td>Period 2 - Report 2</td>
<td>8/20/2013</td>
<td>Appro</td>
</tr>
<tr>
<td>OGS01-C000434-1010209</td>
<td>00000000000000000017499</td>
<td>3</td>
<td>Period 3 - Report 3</td>
<td>9/22/2013</td>
<td>Appro</td>
</tr>
<tr>
<td>OGS01-C000434-1010209</td>
<td>00000000000000000017499</td>
<td>4</td>
<td>Period 4 - Report 4</td>
<td>11/22/2013</td>
<td>Appro</td>
</tr>
</tbody>
</table>

#### Management Process in SFS

- **Step 3.** The **Manage Progress Reports** search page is displayed with a default list of All Progress Reports available.
- **Step 4.** Select the **status tab** on the left to display progress reports for an applicable view.
  - Click the **Not Started** tab.
- **Step 5.** Click the Filter icon to narrow down the number of progress reports that display.
Step | Action
--- | ---
6. | Enter the applicable values in the **Search Criteria** fields or click the **magnifying glass** icon to search for the information.

**Note:**
- In order to search by **Report Description**, a **Contract ID** must be entered or selected first.
- In order to search by **Project Name**, a **Business Unit** must be entered or selected first.

7. | Click the **Done** button.

In this example, we will not filter the progress reports.
To re-assign a different grantee user to save and submit the progress report follow these steps:

- 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.

**Note:** This is an optional step.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.</td>
<td>Select the applicable <strong>Report Description link</strong> to update and submit the progress report. <strong>Period 1 - Report</strong></td>
</tr>
</tbody>
</table>
**Step** | **Action**
---|---
10. | **Note**: There are five Performance Measure Response Types that could be included on a progress report. They are as follows:
- Attachment
- Text/Comment
- Numeric
- Date
- Yes/No

In this example, the Text/Comment response type is used on the progress report.

11. | To view any comments on the Target/Goal, click the **View Text/Comment** button.

   ![View Text/Comment](image)

   **Note**: The **View Text/Comment** button will only display for the Text/Comment response type.

12. | Click the **OK** button to return to the previous page.
13. Click the **Enter Text/Comment** response button.

**Note:** The **Enter Text/Comment** button will only display for the Text/Comment response type.
**SFS Handbook: Grantee Processing in SFS**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>14.</td>
<td>Enter the applicable value in the <strong>Contract Progress Comments</strong> box. <strong>Note</strong>: The <strong>Contract Progress Comments</strong> field could be used to explain your progress in completing the associated task.</td>
</tr>
<tr>
<td>15.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>16.</td>
<td>Click the <strong>Save</strong> button.</td>
</tr>
<tr>
<td>17.</td>
<td>Click the <strong>Submit for Review</strong> button.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
18. | 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.
19. | 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.

The SFS Handbook: Grantee Processing in SFS

Preferred Navigation: Click the Grant Management - State tile.

Alternative Navigation: From the Navbar navigate to: Menu > Manage Contracts > Manage Progress Reports.

Note: You must log in to the SFS Vendor Portal to update and re-submit a progress report.
## SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Progress Report Search</strong> tile.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.</td>
<td>Click the <strong>View Approvals</strong> link to view the agencies comment(s) on what they want updated on the progress report.</td>
</tr>
</tbody>
</table>
### SFS Handbook: Grantee Processing in SFS

#### Contract Progress Report Approval Page

**Step 7.** Expand the **Comments** section to view the comments from the agency.

**Step 8.** Click the **Close (X)** icon in the upper right corner of the page to close the **Contract Progress Report Approval** page.

#### Performance Measures Page

**Step 9.** Update the progress report as needed.

Enter a comment for the agency in the **Send Comment to Agency** field.
### Entering and Maintaining Grant Claims

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

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

---

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>Click the <strong>Resubmit for Review</strong> button.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Click the <strong>No</strong> button to cancel this action which allows you to return to the progress report to make additional edits prior to submitting to the agency.</td>
</tr>
<tr>
<td>11.</td>
<td>Click the <strong>Yes</strong> button to continue sending the progress report back to the agency for review and approval.</td>
</tr>
<tr>
<td>12.</td>
<td>You have successfully completed the <strong>Update and Re-submit a Returned Progress Report</strong> topic.</td>
</tr>
</tbody>
</table>
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:

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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | **Navigation:** Click the **Grants Management - State** tile.  
**Alternative Navigation:** From the **NavBar** navigate to: Menu > eSettlements > Submit a Claim.  
**Note:** You must log in to the SFS Vendor Portal to enter a claim. |
| 2.   | Click the **Submit a Claim** tile. |
Step | Action
--- | ---
3. | Click on the Claim Submission Start button.

4. | A listing of the first five available contracts display. To view more than five contracts, click the View All link.

5. | Click the check box to select the applicable contract.

6. | Click the Next button on the top right-hand corner of the page.
### SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Verify contract details on the <strong>Claim Header</strong> page.</td>
</tr>
</tbody>
</table>
| 8.   | **Vendor Location** values can be selected using the **Supplier Location** magnifying glass icon if needed.  
**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. |
| 9.   | **Note:** Change the **Claim Date** using the calendar icon if needed. Claim date defaults to the current date. |
| 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. |

![Image](image_url)  
**Claim Entry and Submission**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 13.  | Choose a **Contract Period** by clicking on the magnifying glass next to the field.  
**Note:** You would select the available contract period based on the payment schedule and due date listed on the contract. |
| 14.  | **Note:** **Contract Period** is a date range defined by the agency where the period from and to dates fall within the contract begin and expire dates. Each period is assigned a sequential number beginning at 1. |
### Step | Action
---|---
15. | **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.

In this example, click the **Line Type** dropdown menu and select the **Initial** line type.

16. | Click the **Save** button.

17. | Click the **Next** button.

![Image of SFS Claim Line Details](image_url)

### Step | Action
---|---
18. | Validate the **Claim Line Details** information and verify the Line type is **Initial**.

19. | Click the **Line Comments** button.
20. Enter the applicable value in the **Comment** field.
   
   **Note**: Line comments are used to add any additional information pertaining to the line for the agency reviewers to view.

21. Click the **OK** button.

22. Click the **Line Attachments** button.

23. Click the **Add Attachment** button.

24. Click the **Choose File** button, select your **pdf** file, and click the **Open** button.

25. Click the **Upload** button.
Step | Action
--- | ---
26. | Enter a description of the document into the **Description** field.
27. | Click the **OK** button.

**Step** | **Action**
--- | ---
28. | Enter the applicable value into the **Initial Amount Requested** field.
In this example, we will enter **100** into the **Initial Amount Requested** field.
29. | Enter the applicable justification into the **Initial Request Justification** field.
30. | **Click the Save** button.
31. | **Click the Next** button.
Step | Action
--- | ---
32. | Click the **Claim Entry Complete** checkbox.
33. | Click the **Certification** checkbox.
34. | Click the **Save** button and then click the **Submit** button.
35. | Click the **OK** button.

The Claim is submitted into agency workflow and the claim Status changes to **Agency Review**.

36. | You have successfully completed the Enter a New Claim – Advance/Initial Amount topic.

**Enter a New Claim - Reimbursement Amount**

**Topic Description:**
This topic provides the knowledge and skills to create and submit a reimbursement payment.

**Topic Objective:**
In this topic, you will learn:

- How to submit a claim for a reimbursement payment

**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 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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | **Navigation:** Click the **Grants Management - State** tile.  
**Alternative Navigation:** From the **NavBar** navigate to: Menu > eSettlements > Submit a Claim.  
**Note:** You must log in to the SFS Vendor Portal to enter a claim. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Submit a Claim</strong> tile.</td>
</tr>
</tbody>
</table>

**Image:**
![Submit a Claim Tile](image1)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Click the <strong>Start</strong> button.</td>
</tr>
</tbody>
</table>

**Image:**
![Claim Entry and Submission](image2)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>A listing of the first five available contracts display. To view more than five contracts, click the <strong>View All</strong> link.</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>checkbox</strong> to select the appropriate contract.</td>
</tr>
<tr>
<td>6.</td>
<td>Click the <strong>Next</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>7.</td>
<td>Verify contract details on the <strong>Claim Header</strong> page.</td>
</tr>
</tbody>
</table>
| 8.   | **Vendor Location** values can be selected using the **Supplier Location** magnifying glass icon, if needed.  
**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. |
| 9.   | **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. |
| 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. |
### SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 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. |
### Step 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.

### Step 18
Click the **Line Comments** button.
Step | Action
--- | ---
19. | Enter the applicable value into the **Comments** field.
   **Note**: Line comments are used to add any additional information pertaining to the line for the agency reviewers to view.
20. | Click the **OK** button.
21. | Click the **Line Attachments** button.
22. | Click the **Add Attachment** button.

---

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 23. | Click the **Choose File** button, select your **pdf** file, and click the **Open** button.  
   **Note**: Only .pdf files can be uploaded. |
| 24. | Click the **Upload** button. |
Step | Action
--- | ---
25. | Enter a description of the document into the Description field.
26. | Click the OK button.
27. | Enter the applicable dates into the Cost Incurred Date From field and the Cost Incurred Date To field. You can also use the calendar icons to select the dates.

**Note:** Cost Incurred Date From and Cost Incurred Date To must be within the period date range.
## SFS Handbook: Grantee Processing in SFS

### Step 28.
Enter the expenditure amounts for each budget category into the **Expenditures for this Report** field.

**Note:** This is the amount you are requesting reimbursement for, for each budget category.

### Step 29.
Click the **Save** button

### Step 30.
Click the **Next** button.

---

### Step 31.
Enter the applicable text into the **Add Claim Header Comment** field.

**Note:** Header comments are optional and used to enter additional information about the entire claim.

### Step 32.
Click the **Add Comments** button to add a claim header comment.

### Step 33.
Click the **Claim Entry Complete** checkbox.

### Step 34.
Click the **Certification** checkbox.

### Step 35.
Click the **Save** button.

### Step 36.
Click the **Submit** button.

### Step 37.
Click the **OK** button.

The claim is submitted into agency workflow and the claim Status changes to **Agency Review**.
38. You have successfully completed the **Enter a New Claim – Reimbursement Amount** topic.

### Update an Existing Claim

**Topic Description:**
This topic provides the knowledge and skills to update an in process claim.

**Topic Objective:**
In this topic, you will learn:
- How to update and submit a saved claim

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

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 **Search** button to display the search results.

**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.
**Step** | **Action**
---|---
7. | Select the applicable section(s) on the left of the page that you need to complete.
   
   In this example, we need to enter the cost incurred dates and the expenditure amounts for the **Claim Line Details** section.
8. | After completing the remaining claims information, click the **Claim Summary** section to submit the claim for approval.
Step | Action
--- | ---
9. | Click the **Claim Entry Complete** checkbox.
10. | Click the **Certification** checkbox.
11. | Click the **Save** button
12. | Click the **Submit** button.
13. | Click the **OK** button.
Claim is submitted into agency workflow and the claim Status changes to **Agency Review**.
14. | You have successfully completed the **Update an Existing Claim** topic.

**Update a Returned Claim**

**Topic Description:**
This topic provides the knowledge and skills to update a claim returned by the agency.

**Topic Objective:**
In this topic, you will learn:
SFS Handbook: Grantee Processing in SFS

- How to update and resubmit a returned claim

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

**Disclaimer:** The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.
Step | Action
---|---
1. | **Navigation**: Click the **Grants Management - State** tile.  
**Alternative Navigation**: From the **NavBar** navigate to: Menu > eSettlements > Claims Update Guide.

2. | Click the **Claims Update Guide** tile.

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.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.</td>
<td>Select the <strong>Returned</strong> menu on the left side of the page to view all returned claims.</td>
</tr>
<tr>
<td>7.</td>
<td>Click the <strong>Claim Number</strong> link associated to the claim you want to update.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>Click the <strong>Claim Summary</strong> menu on the left side of the page.</td>
</tr>
<tr>
<td>9.</td>
<td>Click the <strong>View History</strong> link to view the workflow comments associated with the returned claim.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
10. | After reviewing the workflow comment(s) information, click the OK button to return to the Claim Summary page.

11. | Make the update(s) requested by the agency.
   
   In this example, we will attach additional documentation, so we will click the Claim Line Details tab.

12. | Click the Line Attachments button to upload additional documentation.
### Step 13
Click the **Add a New Row (+)** icon to add a new row.

### Step 14
Click the **Add Attachment** button to upload additional documentation.
Step | Action |
--- | --- |
15. | Click the **Choose File** button, select your **pdf** file, and click the **Open** button.  
**Note**: Only .pdf files can be uploaded. |
16. | Click the **Upload** button. |

---

**Step** | **Action** |
--- | --- |
17. | Enter the document description in the **Description** field. |
18. | Click the **OK** button. |
### Step 19
Click the **Save** button.

![Image of Update Claim interface](image)

### Step 20
Click the **Claim Summary** menu on the left side of the page.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>19.</td>
<td>Click the <strong>Save</strong> button.</td>
</tr>
<tr>
<td>20.</td>
<td>Click the <strong>Claim Summary</strong> menu on the left side of the page.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
21. | Click the **Claim Entry Complete** check box.
22. | Click the **Certification** checkbox.
23. | Click the **Save** button.
24. | Click the **Submit** button.
25. | Click the **OK** button.

The claim is submitted into agency workflow and the claim Status changes to **Agency Review**.

26. | You have successfully completed the **Update a Returned Claim** topic.

---

**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.
SFS Handbook: Grantee Processing in SFS

**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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>From the <strong>NavBar</strong> navigate to: Menu &gt; eSettlements &gt; Claim Inquiry. <strong>Note:</strong> You must log in to the SFS Vendor Portal to view a claim.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
2. | **Note**: The **Claim Inquiry** feature allows you to search for and view existing claims. The search criteria you use to search for existing claims can be saved under an **Inquiry Name** so you can access and reuse it each time you search for claim(s).

3. | If you already created and saved **Claim Inquiry Name(s)**, you can use the **Find an Existing Value** tab. You would enter the applicable search criteria and click the **Search** button to display the existing Inquiry Names that can be selected.

**or**

If the **Claim Inquiry Name** is not already established and you want to create a new Inquiry Name, click the **Add a New Value** tab, enter the desired **Claim Inquiry Name**, and click the **Add** button.
### Step 4
Enter the desired **Business Unit, Vendor ID**, and any other available search criteria if known.

**Note:** **Vendor ID** is a required search field.

### Step 5
**Note:** The **Claim Status** options are:
- New
- In Process
- Returned
- Complete
- Under Agency Review
- Approved
- Cancelled

In this example, we will not search by claim status.

### Step 6
Click the **Search** button.

### Step 7
Verify Claim Details and Voucher and Payment results for the desired claim.

### Step 8
On the **Claim Details** tab, click on the **Claim ID** link for the desired claim.
### Step 9

Click the **View Approvals** link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>After reviewing the approval workflow, click the <strong>Close (X)</strong> icon.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Claim Review Summary" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.</td>
<td>Click the <strong>Reviewed Amount</strong> button.</td>
</tr>
</tbody>
</table>
Step 12. Click the Line Comments button (the number in parenthesis indicates the number of comments).
Step | Action
--- | ---
13. | Click the OK button when your review of the line comments is complete.
### SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>14.</td>
<td>Click the <strong>Attachments</strong> button (the number in parenthesis indicates the number of attachments).</td>
</tr>
</tbody>
</table>

#### Reimbursement Line Attachments

**Line Attachments**

- **Business Unit:** OM801
- **Claim Number:** 090000187
- **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.

<table>
<thead>
<tr>
<th>File Details</th>
<th>File Name</th>
<th>Description</th>
<th>Show To Supplier</th>
<th>Show In Invoice</th>
<th>Created By</th>
<th>Created On</th>
<th>Created On Time</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Preperl_Req_Docs_Pg.pdf</td>
<td>Upload Example</td>
<td></td>
<td></td>
<td></td>
<td>05/19/23</td>
<td>11:41:39 AM</td>
</tr>
</tbody>
</table>

- **View Attachment** button.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>15.</td>
<td>Click the <strong>View Attachment</strong> button.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>16.</td>
<td>When you are finished reviewing the attachment, click the <strong>Close (X)</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>17.</td>
<td>Click the <strong>OK</strong> button to return to the previous page.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
18. | Click the **OK** button to return to the previous page.
Step | Action
--- | ---
19. | Click the **Header Comments** link to view any header comments for the claim.
20. | Click the **Workflow Comments** link to view workflow comments for the claim.
21. | Click the **Attachments** button to view any header attachments for the claim.
22. | Click the **Preview Claim** link to view the pdf version of the claim.
   **Note:** Once the claim is approved, the preview claim link will be grayed out and the claim pdf is only accessible as an attachment via the **Attachments** button.
23. | You have successfully completed the **Claim Inquiry** topic.
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.
Step | Action
--- | ---
1. | From the **NavBar** navigate to: Menu > Manage Contracts > Vendor Contract Summary Report

2. | Enter the applicable values in the search criteria fields which consist of the following fields:

   - 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
   - Period To Date

**Note:**
- 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.

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.