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

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# SFS Handbook: Grantee Processing in SFS

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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](mailto:HelpDesk@sfs.ny.gov) |  
Using the SFS Support tile in the SFS Vendor Portal

# SFS Handbook: Grantee Processing in SFS

## Grantee Processing in SFS

### Handbook Description:

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

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

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

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

### Handbook Concepts:

This Grantee Handbook explores the following concepts:

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

### Using SFS Handbooks:

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

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

## Searching and Viewing Bid Events (Grant Opportunities)

### Lesson Description:

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

# SFS Handbook: Grantee Processing in SFS

## Lesson Objectives:

In this lesson, you will learn how to:

- Search and view bid events

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

### Topic Description:

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

### Topic Objectives:

In this topic, you will learn:

- How to search for and view bid events

## Procedure

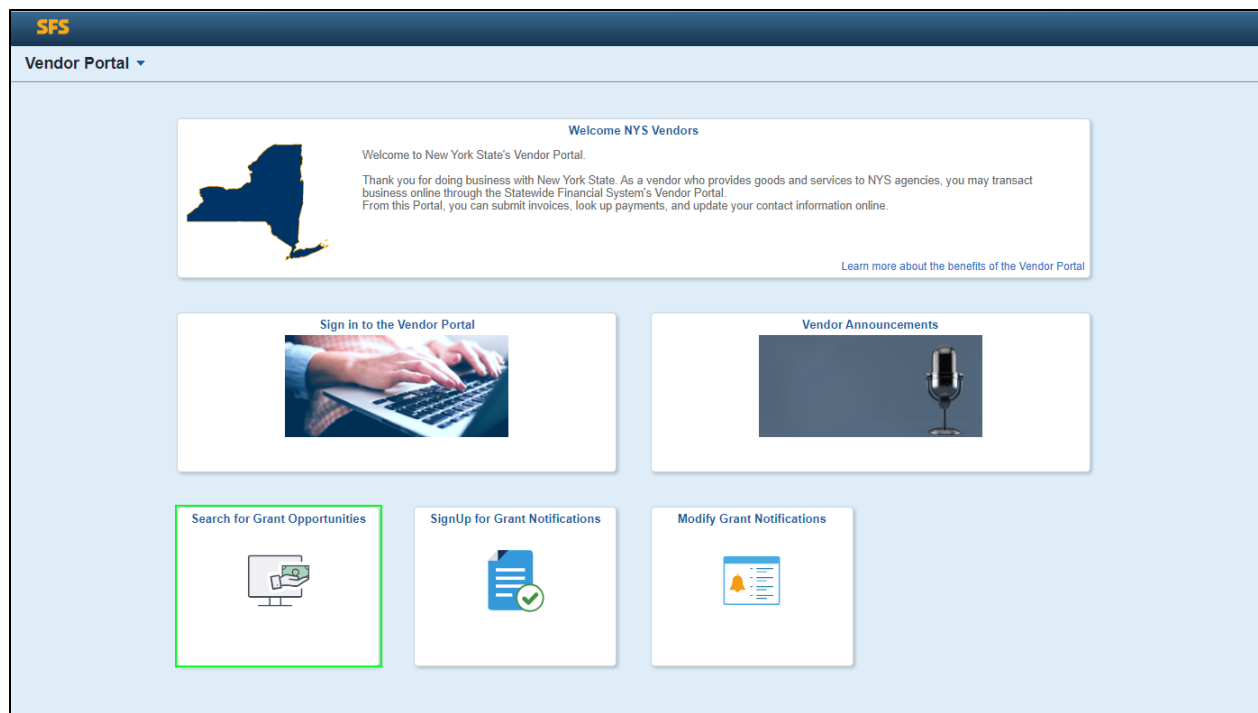
**Scenario:** As a member of the public, you can search and view public bid events (grant opportunities) without signing in to the SFS Vendor Portal by visiting the [SFS Public Portal Homepage](#) and selecting the **Search for Grant Opportunities** tile.

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

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



# SFS Handbook: Grantee Processing in SFS



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

Vendor Portal
Search for Grant Opportunities

### Search for Grant Opportunities

Enter the search criteria and click the Search button

Search Criteria

Event ID

Search by Grant Opportunity

Search by Due Date

Search by Status

Search by Eligibility

Search by Funding Agency

Search by Service Area

From

To

Available

Environmental Supp

Search

Clear Criteria

#### Search Results

Event ID

Funding Agency

Grant Opportunity

Status

Eligibility

Availability Date

Anticipated Release Date

Due Date

EV10000061

OMH01

2023 OMH Test

Available

Governmental Entity, Not-For-Profit

09/20/23 2:29PM

09/20/23 2:29PM

12/31/2023 2:29PM EST

## SFS Handbook: Grantee Processing in SFS

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

# SFS Handbook: Grantee Processing in SFS

**Search for Grant Opportunities**

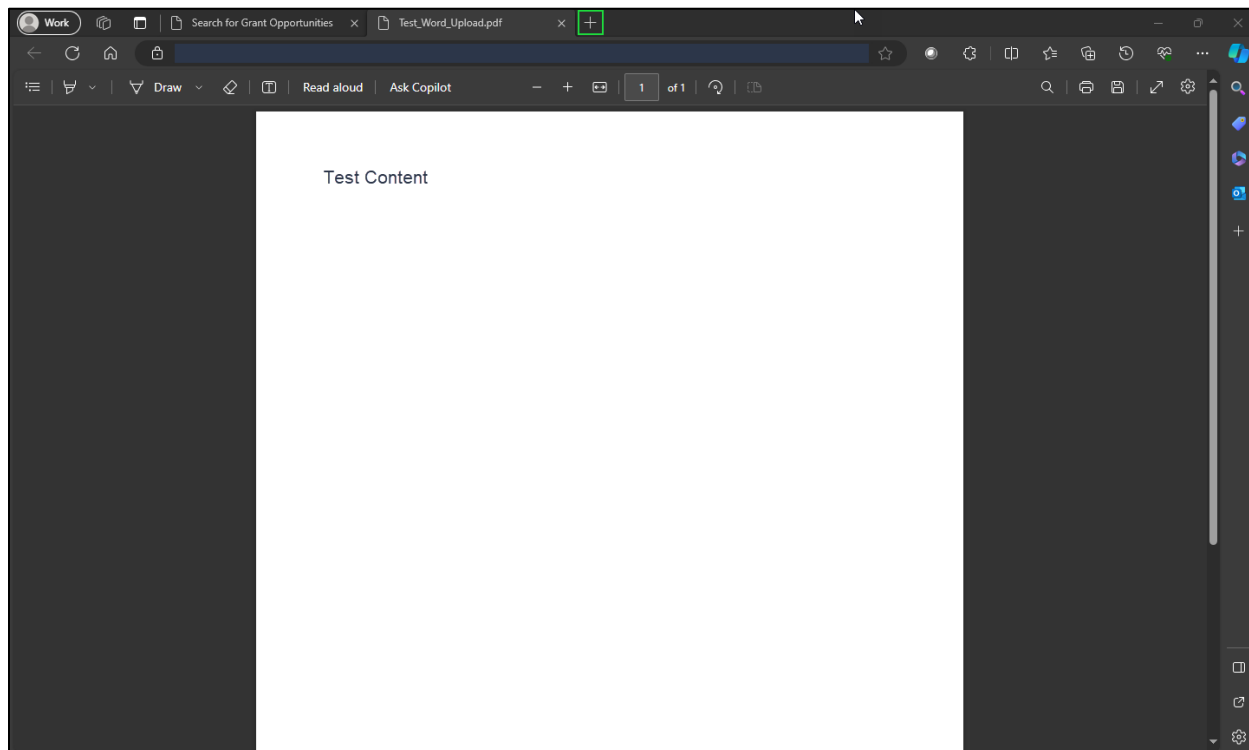
**Overview**

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

**Full Announcement Details**

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

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

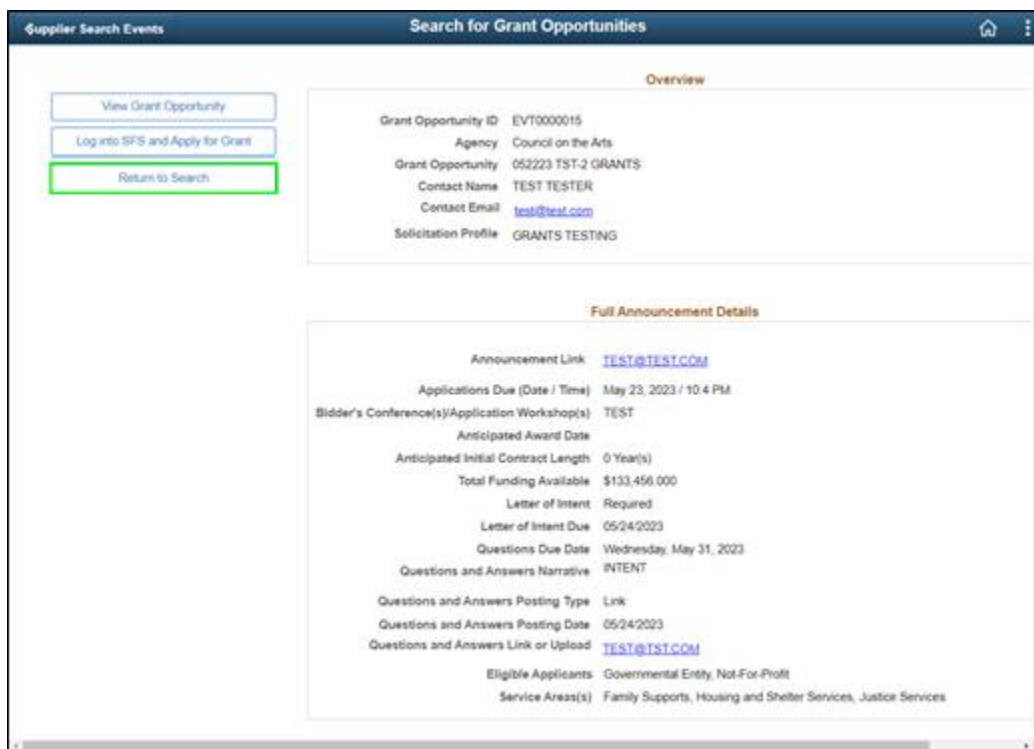


## SFS Handbook: Grantee Processing in SFS

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

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

## SFS Handbook: Grantee Processing in SFS



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

## Subscribing to Email Notifications

### Lesson Description:

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

### Lesson Objectives:

In this lesson, you will learn how to:

- Subscribe to email notifications.

## Subscribe to Email Notifications

### Topic Description:

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

### Topic Objectives:

In this topic, you will learn:

- How to subscribe to email notifications

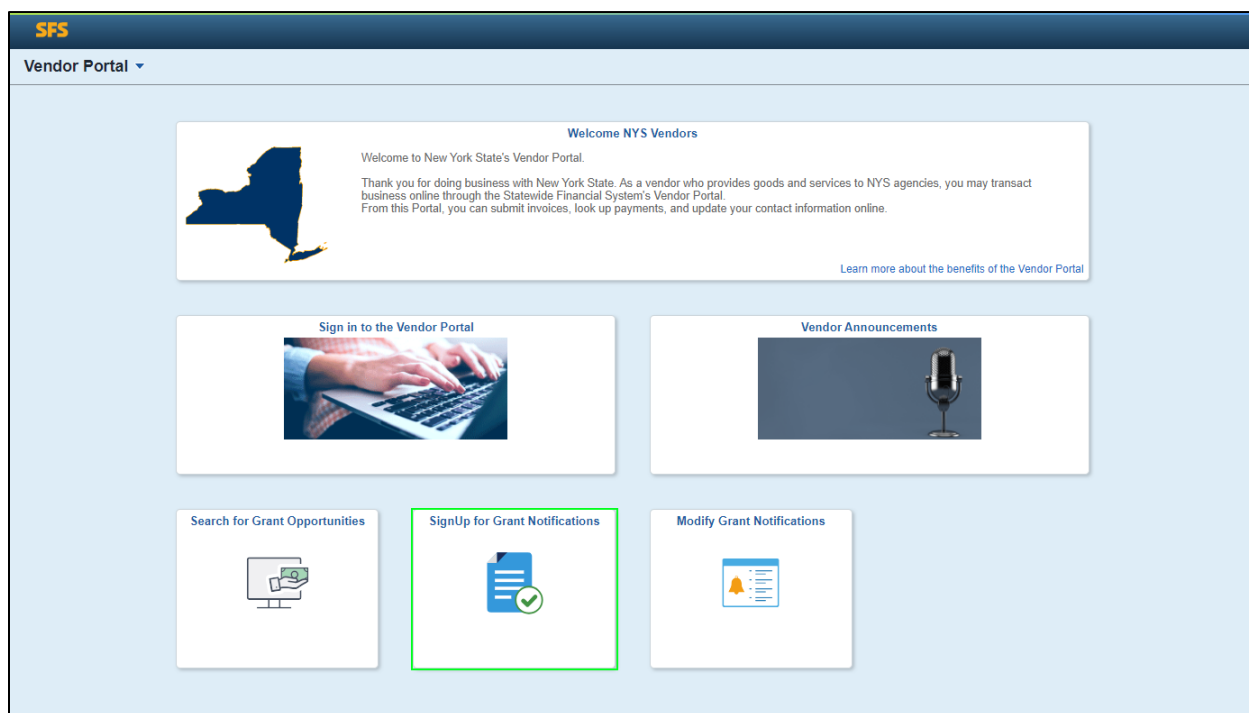
# SFS Handbook: Grantee Processing in SFS

## Procedure

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

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

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



Step	Action
3.	Click the <b>SignUp for Grant Notifications</b> tile.

## SFS Handbook: Grantee Processing in SFS

Vendor Portal
Sign Up Grant Notifications

**Information**

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

\*First Name

\*Last Name

\*Organization

\*Email

\*Confirm Email

**Service Area Preferences**

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

☐ Select/De-Select All

☐ Health and Human Services

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

☐ Non Health and Human Services

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

Sign Up

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

# SFS Handbook: Grantee Processing in SFS

## Modifying Email Notifications

### Lesson Description:

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

### Lesson Objectives:

In this lesson, you will learn how to:

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

## Modify Email Notifications

### Topic Description:

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

### Topic Objectives:

In this topic, you will learn:

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

## Procedure

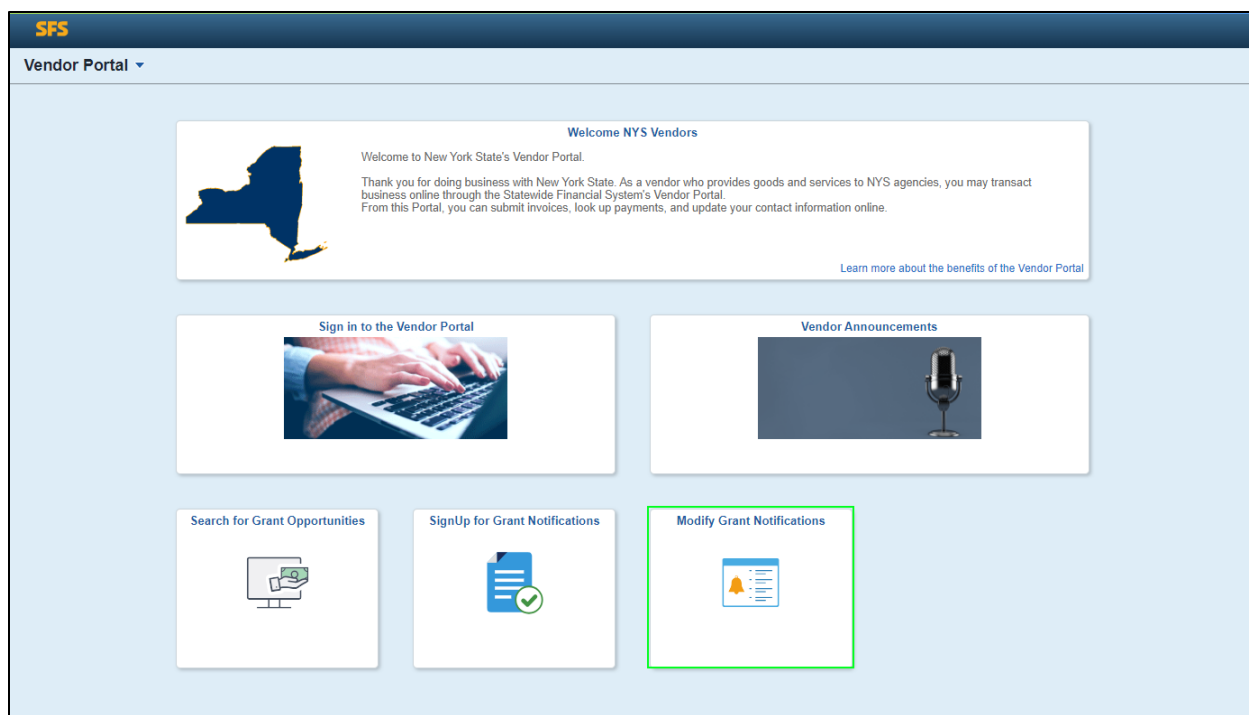
**Scenario:** As a member of the public, you will modify contact information and/or service area preferences previously selected for email notifications without signing in to the SFS Vendor Portal.

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

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



## SFS Handbook: Grantee Processing in SFS



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

The screenshot shows the 'Modify Grant Notifications' page. At the top is a dark blue header with a back arrow, 'Vendor Portal', and 'Modify Grant Notifications' text, and a home icon on the right. Below the header is a white box with a 'Search For Email' section. It contains a label '\*Enter Email Address:' followed by a text input field with a green border. Below the input field is a blue 'Search' button.

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

# SFS Handbook: Grantee Processing in SFS

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

**Information**

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

\*First Name

John

\*Last Name

Doe

\*Organization

NFP ORG

\*Email

tst@tst.com

\*Confirm Email

tst@tst.com

**Service Area Preferences**

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

☐ Select/De-Select All

☐ Health and Human Services

☐ Education Supports

☐ Family Supports

☒ Health Services

☐ Housing and Shelter Services

☒ Justice Services

☒ Workforce Development

☐ Non Health and Human Services

☐ Agricultural Supports

☐ Environmental Supports

☐ Public Transportation Services

☐ Public Safety Supports

☐ Government Supports

☐ Un-subscribe

Save

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

## Maintaining Grantee Information

### Lesson Description:

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

### Lesson Objectives:

In this lesson, you will learn how to:

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

## View and Update Grantee Information

### Topic Description:

## SFS Handbook: Grantee Processing in SFS

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

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

### Topic Objectives:

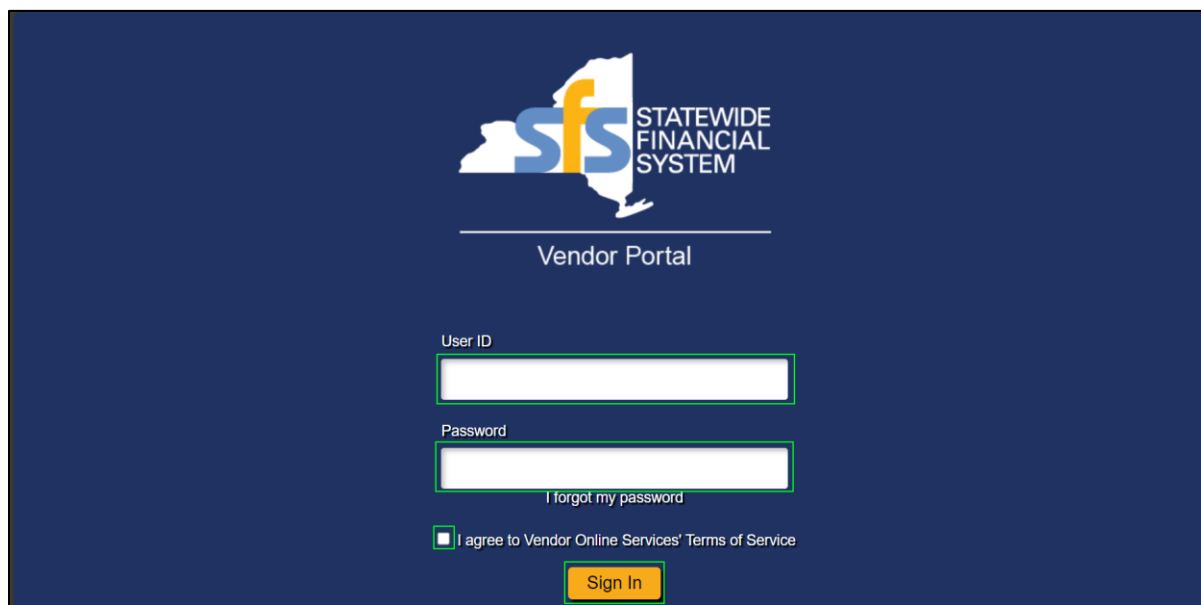
In this topic, you will learn:

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

### Procedure

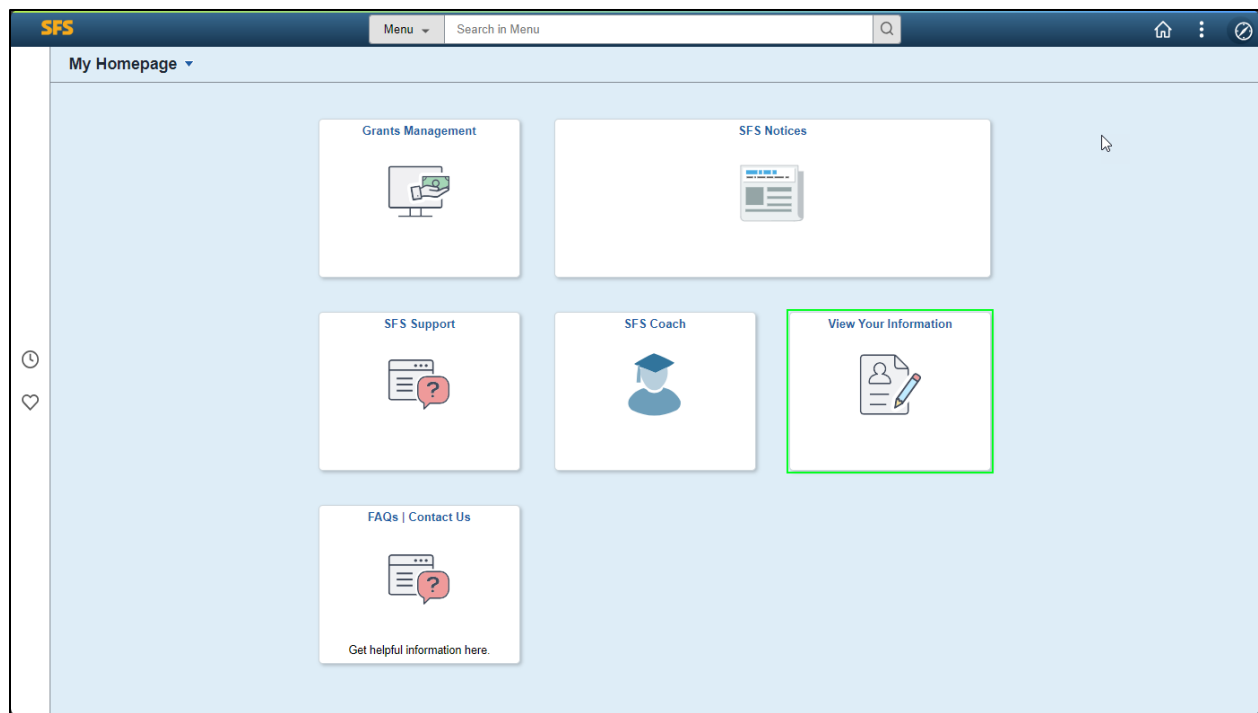
**Scenario:** You look up your organization's grant information in the SFS Vendor Portal and notice that some information needs to be updated. You will log in to the SFS Vendor Portal and make the applicable grant information updates before submitting for review and approval.

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

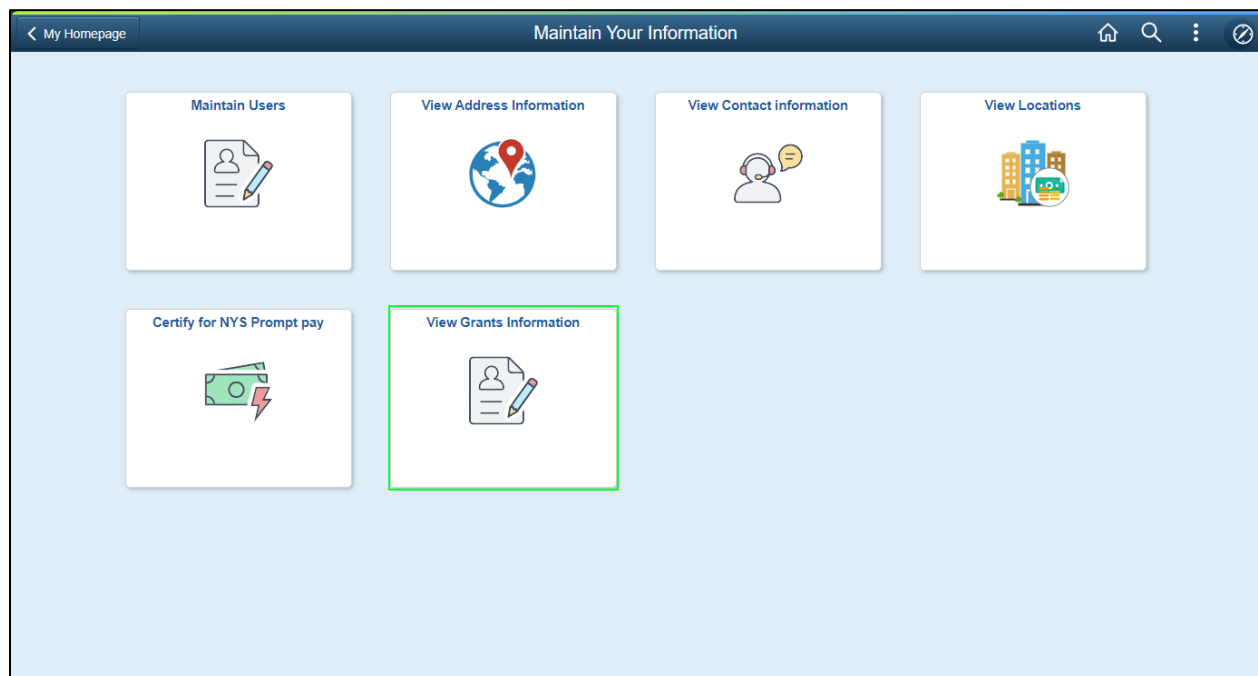


Step	Action
1.	Begin by navigating to the <a href="#">SFS Vendor Portal</a> .
2.	Enter your <b>User ID</b> and <b>Password</b> and select the <b>I agree to Vendor Online Services' Terms of Service</b> checkbox.
3.	Click the <b>Sign In</b> button.

## SFS Handbook: Grantee Processing in SFS



Step	Action
4.	From the <b>Homepage</b> click the <b>View Your Information</b> tile.



Step	Action
5.	Click the <b>View Grants Information</b> tile.

## SFS Handbook: Grantee Processing in SFS

**View Grants Information**

SetID: SHARE Supplier ID: 1000001549

Find | View All | First | 1 of 1 | L

Prequalification Page  
Document Vault  
Audit Log

\*Effective Date: 06/26/2023

Prequalification Exemption: ☐

Prequalification Required: ☒

Organization Type: Governmental Entity Tax Year End Date:

Charities Registration No.: Current Operating Budget: 2245144


Exemption State/Code: N/A

Prequalification Status: In Review By Agency Number of Part Time Staff: 2

Prequalification Exp. Date: 11/15/2025 Number of Volunteers:

Sectarian Entity: ☐ Number of Full Time Staff: 8

Mission Statement: Metro advances library and knowledge management services in New York City, Westchester County, and beyond through active collaboration, resource and knowledge sharing, strategic planning and thinking, professional development and advocacy among our members and other organizations with similar interests.

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



## SFS Handbook: Grantee Processing in SFS

Step	Action
9.	Click the <b>Supplier Change Request</b> tile.

My Homepage Welcome

Welcome

Welcome! Click the icons at the top of the page or Next to make changes to your Company Name (Company Profile), Address (Addresses), Contacts (Contacts) or Banking information (Payment Profile).

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.

Exit Save for Later < Previous Next > Review Changes

Step	Action
10.	Click the <b>GM Info</b> train stop.

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

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

Please update your Grants Management information.

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

Bidder Grants

Effective Date: 06/26/2023

Prequalification Required: ☒

Organization type: Not-For-Profit

Charities Registration Num:

Exemption State/Code: N/A

Prequalification Status: RFI

Prequalification Exp. Date: 11/15/2025

Sectarian Entity: ☐

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

Tax Year End Date:

Fiscal Year End Date: 12/31/2023

Current Operating Budget:

Number of Part Time Staff: 7

Number of Volunteers: 19

Number of Full Time Staff: 34

Prequalification Page Document Vault

+

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

## SFS Handbook: Grantee Processing in SFS

Step	Action
14.	Select the applicable <b>Audit Reason Code</b> .  <b>Note:</b> <b>Audit Reason Code</b> classifies the type of change that was made. Some examples are: Address Change, Name Change, Corrections, etc.
15.	Enter any additional information in the <b>Comments</b> field to clarify what was changed.  <b>Note:</b> Comments are optional.
16.	Select <b>Confirm Changes</b> checkbox.
17.	Select <b>Submit</b> button to make the changes.  <b>Note:</b> 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 <b>View and Update Grantee Information</b> topic.

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

### Topic Description:

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

### Topic Objectives:

In this topic, you will learn:

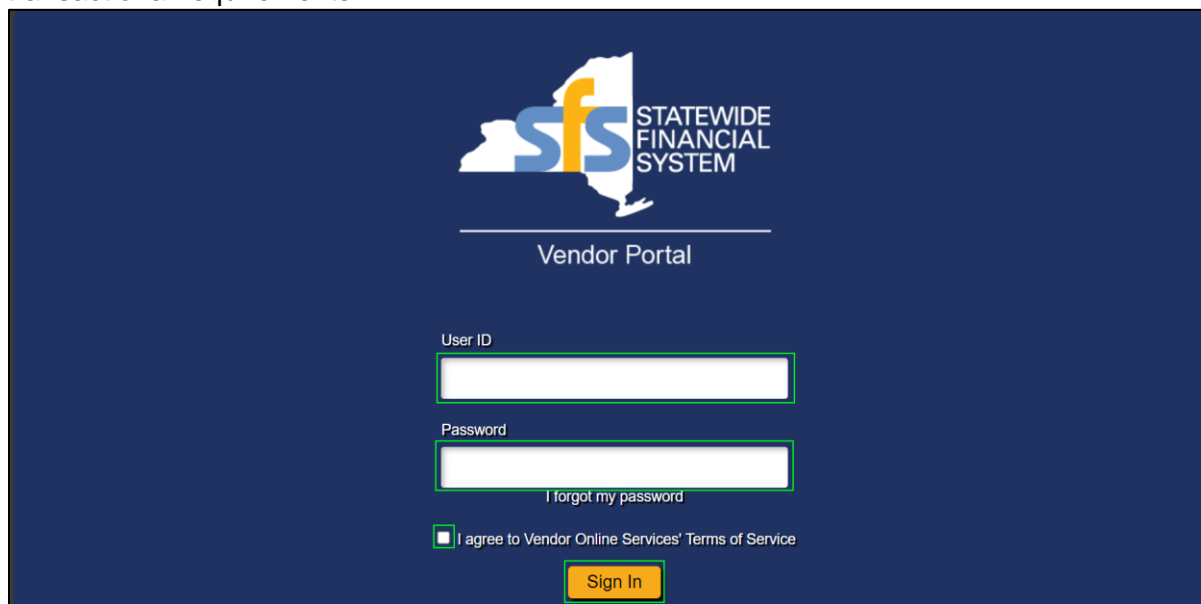
- How to add a grant contract approver's name to their profile in SFS

### Procedure

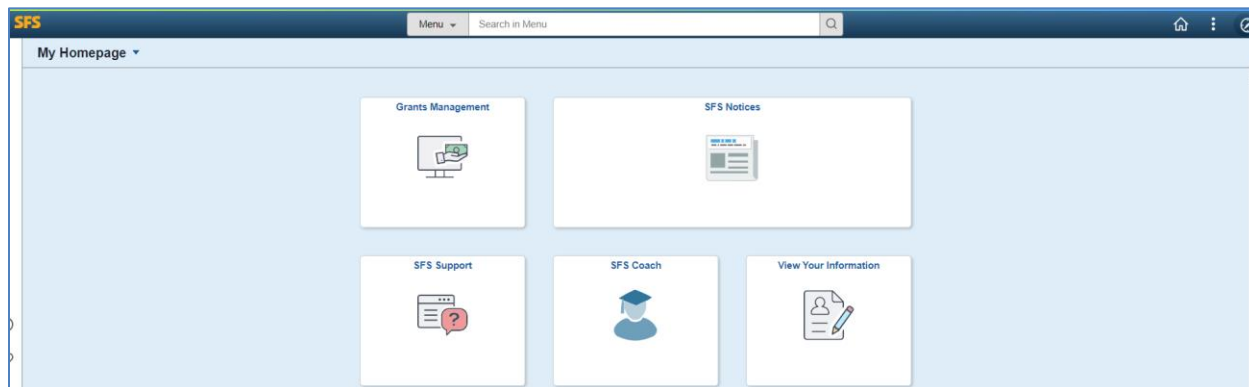
## SFS Handbook: Grantee Processing in SFS

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

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




Step	Action
1.	Begin by navigating to the <a href="#">SFS Vendor Portal</a> .
2.	Enter your <b>User ID</b> and <b>Password</b> and select the <b>I agree to Vendor Online Services' Terms of Service</b> checkbox.
3.	Click the <b>Sign In</b> button.





## SFS Handbook: Grantee Processing in SFS

Step	Action
4.	<p>From the <b>NavBar</b> navigate to: Menu &gt; Maintain Supplier Information &gt; Manage User Profiles.</p> <p>Click the <b>NavBar</b> button.</p> 
5.	Click the <b>Menu</b> button.
6.	Click the <b>Maintain Supplier Information</b> menu.
7.	Click the <b>Manage User Profiles</b> menu.

Security

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

Find Existing User ID Add a New User ID

▼ Search Criteria

Search by: User ID begins with

Search Advanced Search

Find Existing User ID | Add a New User ID

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

[< My Homepage](#)

Setup User

Setup User

Logon Information

User ID

Description

(Examples: Smith, Fred)

☐ Account Locked Out?

(Click here to disable the access to the system for this user)

Operator Password (Encrypted)

Confirm Password

\*E-mail Address

Language Code

Rate Type

Currency Code

USD

## SFS Handbook: Grantee Processing in SFS

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

### Managing Prequalification Applications

#### Lesson Description:

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

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

#### Lesson Objectives:

In this lesson, you will learn how to:

- Enter and Submit Prequalification Information

### Enter and Submit a Prequalification Application

#### Topic Description:

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

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

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

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

#### Topic Objectives:

In this topic, you will learn:

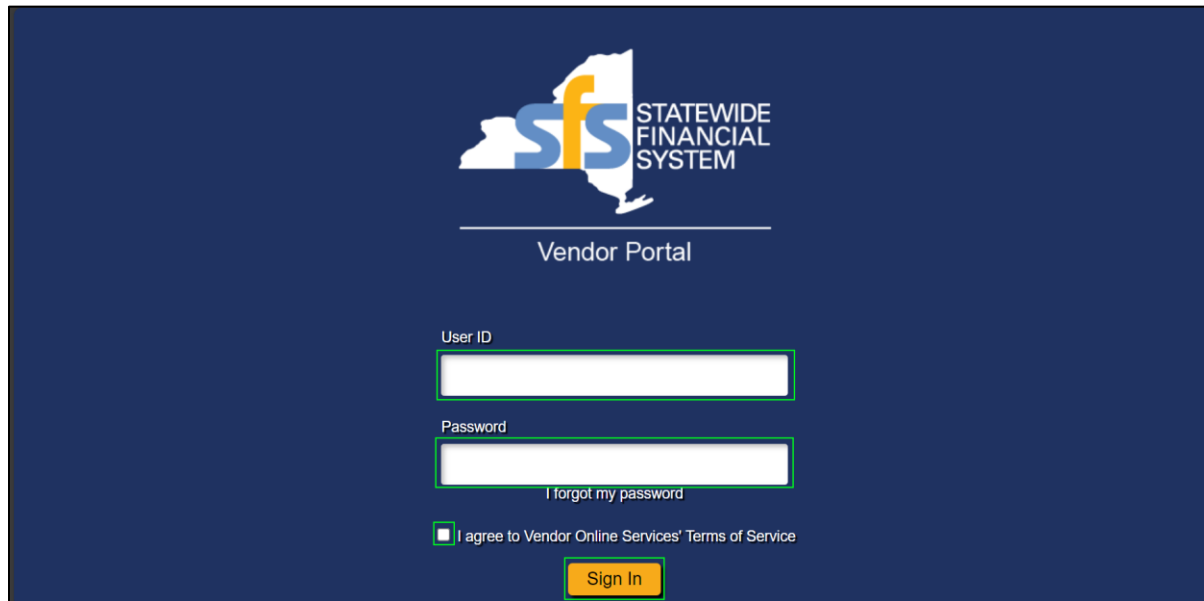
- How to enter and submit a Prequalification Application

#### Procedure

## SFS Handbook: Grantee Processing in SFS

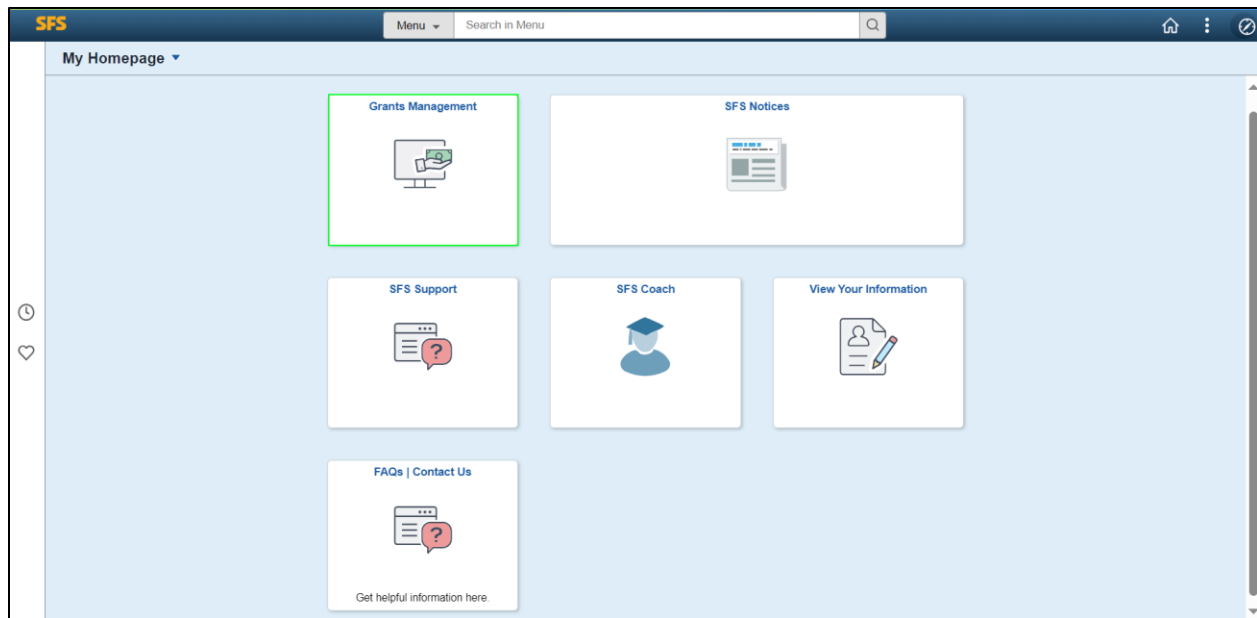
**Scenario:** As a Grantee User, you wish to apply for a grant, but first you must enter a Prequalification application with the Agency you are seeking the grant from. You will enter and submit a Prequalification application.

**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.

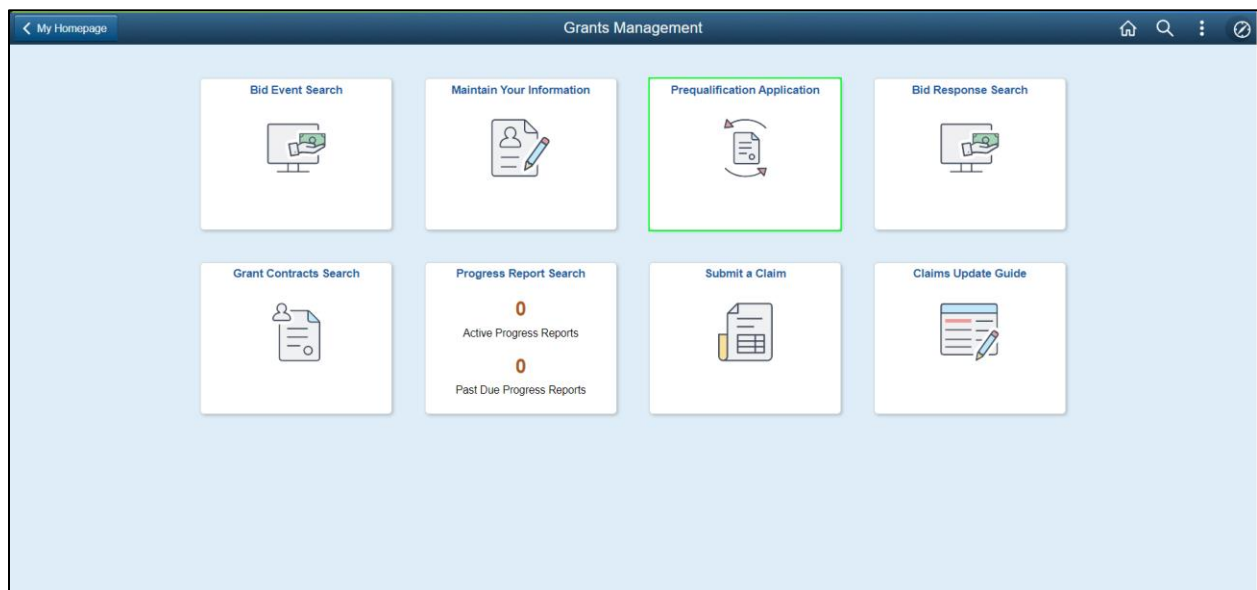


Step	Action
4.	Begin by navigating to the <a href="#">SFS Vendor Portal</a> .
5.	Enter your <b>User ID</b> and <b>Password</b> and select the <b>I agree to Vendor Online Services' Terms of Service</b> checkbox.
6.	Click the <b>Sign In</b> button.

## SFS Handbook: Grantee Processing in SFS



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



Step	Action
5.	Click the <b>Prequalification Application</b> tile.

# SFS Handbook: Grantee Processing in SFS

**Welcome Page**

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

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

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

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

**Some Reminders:**

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

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

If you have any questions on the prequalification process, please call the Grants Management Team at: (518) 474-5595 or email: [grantsgateway@ts.ny.gov](mailto:grantsgateway@ts.ny.gov).

**Select an activity below**

☒ Initiate a Prequalification Application

Supplier ID:

HOPE PROGRAM INC

Prequalification Application Started	Organization Type
11/09/2023	Not-For-Profit

[View Version history](#)

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

# SFS Handbook: Grantee Processing in SFS

Grants Management Welcome Page

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

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

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

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

Some Reminders:

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

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

If you have any questions on the prequalification process, please call the Grants Management Team at: (518) 474-5595 or email: [grantsgateway@ts.ny.gov](mailto:grantsgateway@ts.ny.gov).

Select an activity below

● Initiate a Prequalification Application

Supplier ID 1000051400

HOPE PROGRAM INC

Prequalification Application Started 11/09/2023 ☐

Organization Type Not-For-Profit

[View Version history](#)

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

Prequalification Application

Next >

Organization Information

● Visited

Required Documents

☐ Not Started

Contacts

☐ Not Started

Submit

☐ Not Started

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

Supplier ID 1000051400

Supplier Information

Supplier Name HOPE PROGRAM INC

Email ID test123@sfs.ny.gov

Prequalification Status Application In Progress

Prequalification Expiration Date

Organization Type Not-For-Profit

Version 1

[View Version History](#)

Application ID 000016146

State Agency OMH01

Office of Mental Health

Tax Year End Date  (MM/DD)

Save For Later

Profile Questions


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

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

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

Explanation/Comments

## SFS Handbook: Grantee Processing in SFS

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

Cancel

Lookup

Search for: State Agency

▼ Search Criteria

Business Unit (begins with)

Search

Clear

Show Operators

▼ Search Results

Table Icon

List Icon

33 rows

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

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

# SFS Handbook: Grantee Processing in SFS

**Prequalification Application**

Exit Next

**Organization Information** Visited

**Required Documents** Not Started

**Contacts** Not Started

**Submit** Not Started

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

Supplier ID 1000051400 Supplier Information

Supplier Name HOPE PROGRAM INC

Email ID test123@sfs.ny.gov

Prequalification Status Application In Progress

Prequalification Expiration Date

Organization Type Not-For-Profit

State Agency OMH01 Office of Mental Health

Version 1 View Version History

Application ID 000016146

Save For Later

**Tax Year End Date** (MM/DD)

**Profile Questions**

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

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

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

Explanation/Comments

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

**Prequalification Application**

Exit Next

**Organization Information** Visited

**Required Documents** Not Started

**Contacts** Not Started

**Submit** Not Started

**Profile Questions**

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

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

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

Explanation/Comments

Text Responses

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

b. Been subject to a denial or revocation of a government prequalification?

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

Explanation/Comments

Text Responses

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

c. Been denied a contract or had a bid rejected based upon a finding of non-responsibility by a government entity?

If yes, provide a brief description of the circumstances of such incident(s) and any remedial or corrective action(s) taken and the current status of the issue(s).

Explanation/Comments

Text Responses



## SFS Handbook: Grantee Processing in SFS

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

The screenshot shows the 'Prequalification Application' interface. The sidebar on the left includes 'Organization Information' (marked 'Visited') and 'Required Documents' (with options 'Not Started', 'Contacts', 'Submit', and 'Not Started'). The main content area displays three questions. Question 14 asks about various policies (Anti-nepotism, Staff code of conduct, Board of Directors Conflict of Interest, Conflict of Interest Policy, Diversity Policy, Fiscal/Internal Controls Policy). Question 15 asks about a written and posted Equal Employment Opportunity (EEO) policy, with a 'List Item' field highlighted by a green box and a magnifying glass icon. Question 16 asks if a quorum of the board of directors met in compliance with the organization's bylaws. Each question has an 'Explanation/Comments' field and a 'Text Responses' field.

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

## SFS Handbook: Grantee Processing in SFS

The screenshot shows the 'Prequalification Application' window. A 'List Options' dialog box is open, displaying a table with the following data:

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

The 'Return' button is highlighted in the dialog. The background application shows a sidebar with 'Organization Information' (Visited), 'Required Documents' (Not Started), 'Contacts' (Not Started), and 'Submit' (Not Started). The main content area displays questions 14, 15, and 16, along with 'Text Responses' and 'Explanation/Comments' fields.

Step	Action
14.	Select one of the <b>options</b> from <b>List Options</b> .
15.	Click <b>Return</b> .

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

## SFS Handbook: Grantee Processing in SFS

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

**List Options**

List Values

10 rows

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

Return


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

## SFS Handbook: Grantee Processing in SFS

The screenshot shows the 'Prequalification Application' window. On the left is a sidebar with a green header 'Organization Information' (marked 'Visited') and two sections: 'Required Documents' (marked 'Not Started') and 'Submit' (marked 'Not Started'). The main area contains two questions:

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

At the bottom, a 'Comments' field is highlighted with a green border. It contains the text 'None at this time.' and has a small icon in the bottom right corner.

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

# SFS Handbook: Grantee Processing in SFS

**Prequalification Application**

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

Supplier ID 1000051400

Supplier Name HOPE PROGRAM INC

Save For Later

**Attachments**

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

Comments

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

# SFS Handbook: Grantee Processing in SFS

**Prequalification Application**

Organization Information  
● Visited

Required Documents  
● Visited

Contacts  
○ Not Started

Submit  
○ Not Started

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

Supplier ID 1000051400

Supplier Name HOPE PROGRAM INC

Save For Later

**Attachments**

10 rows

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

Comments

Step	Action
23.	To add an attachment, click the <b>Attach</b> link.

**Prequalification Application**

Organization Information  
● Visited

Required Documents  
● Visited

Contacts  
○ Not Started

Submit  
○ Not Started

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

Supplier ID 1000051400

Supplier Name HOPE PROGRAM INC

Save For Later

**Attachments**

10 rows

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

Comments

**Required Documents**

Cancel Add Attachment Done

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

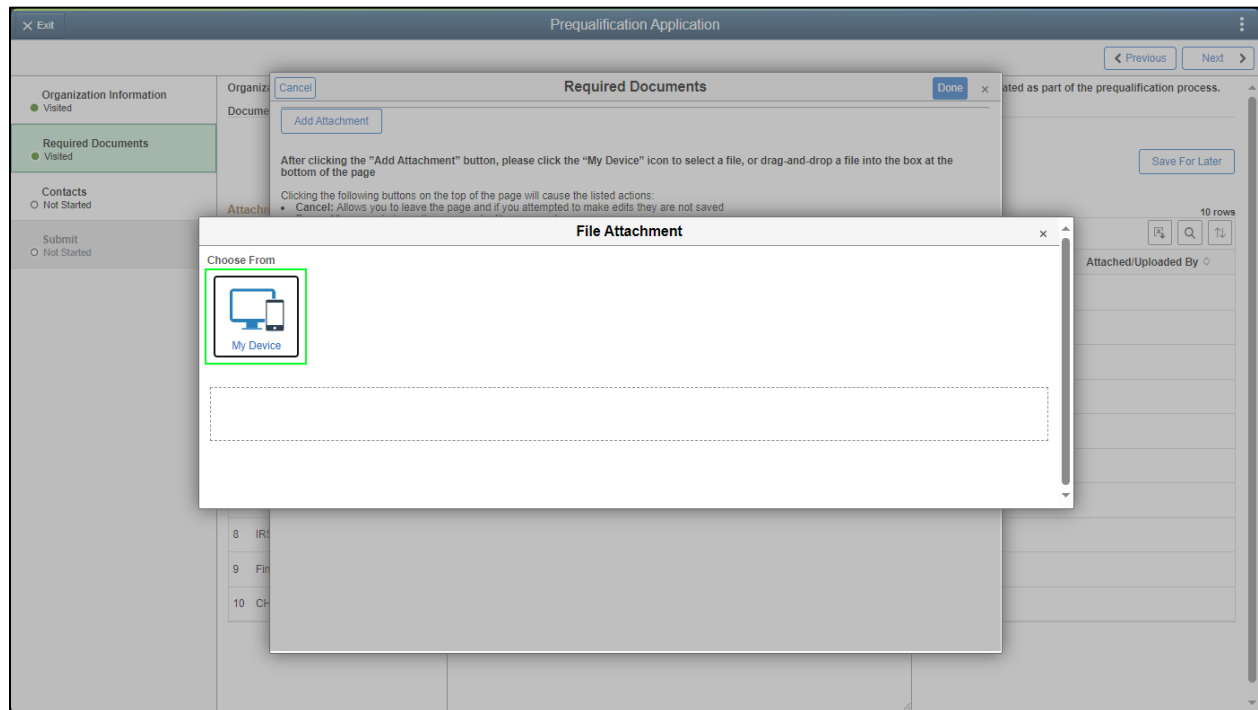
Clicking the following buttons on the top of the page will cause the listed actions:

- 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

## SFS Handbook: Grantee Processing in SFS

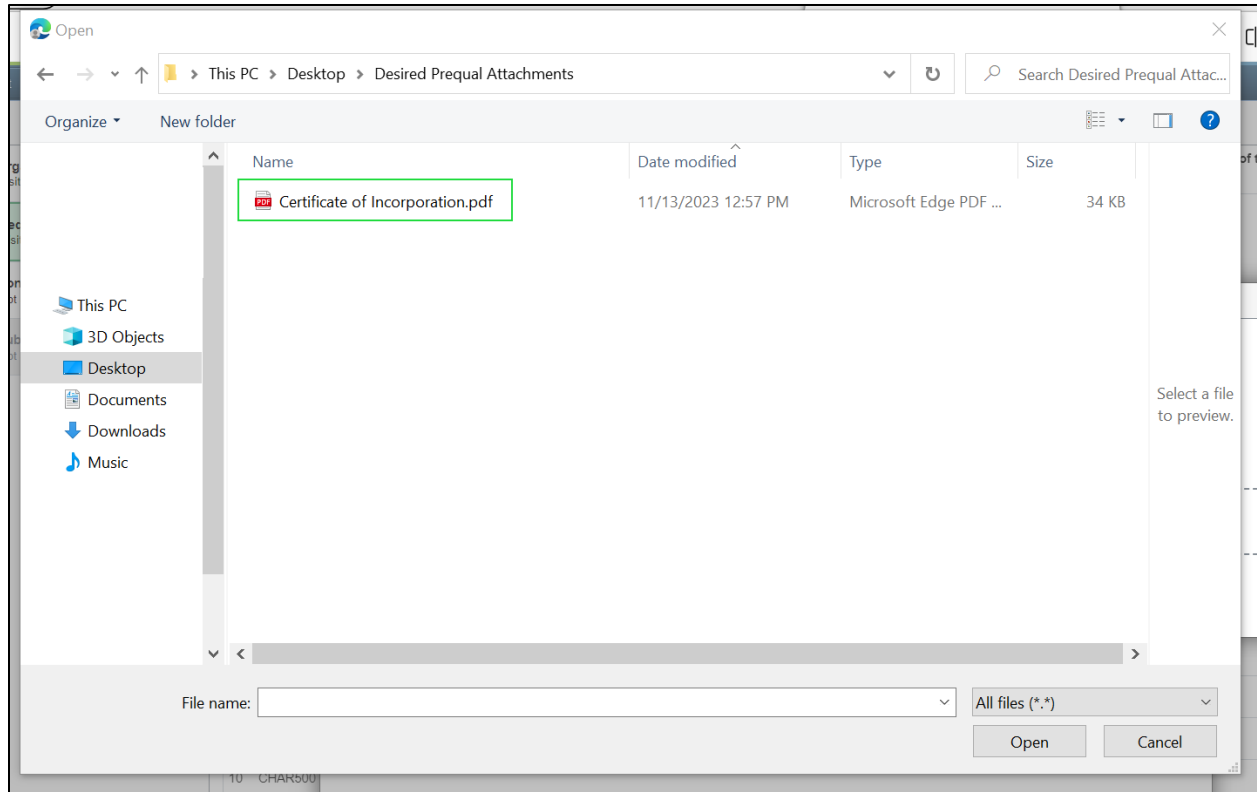
Step	Action
24.	Click the <b>Add Attachment</b> button.

Add Attachment



Step	Action
25.	Click the <b>My Device</b> button.

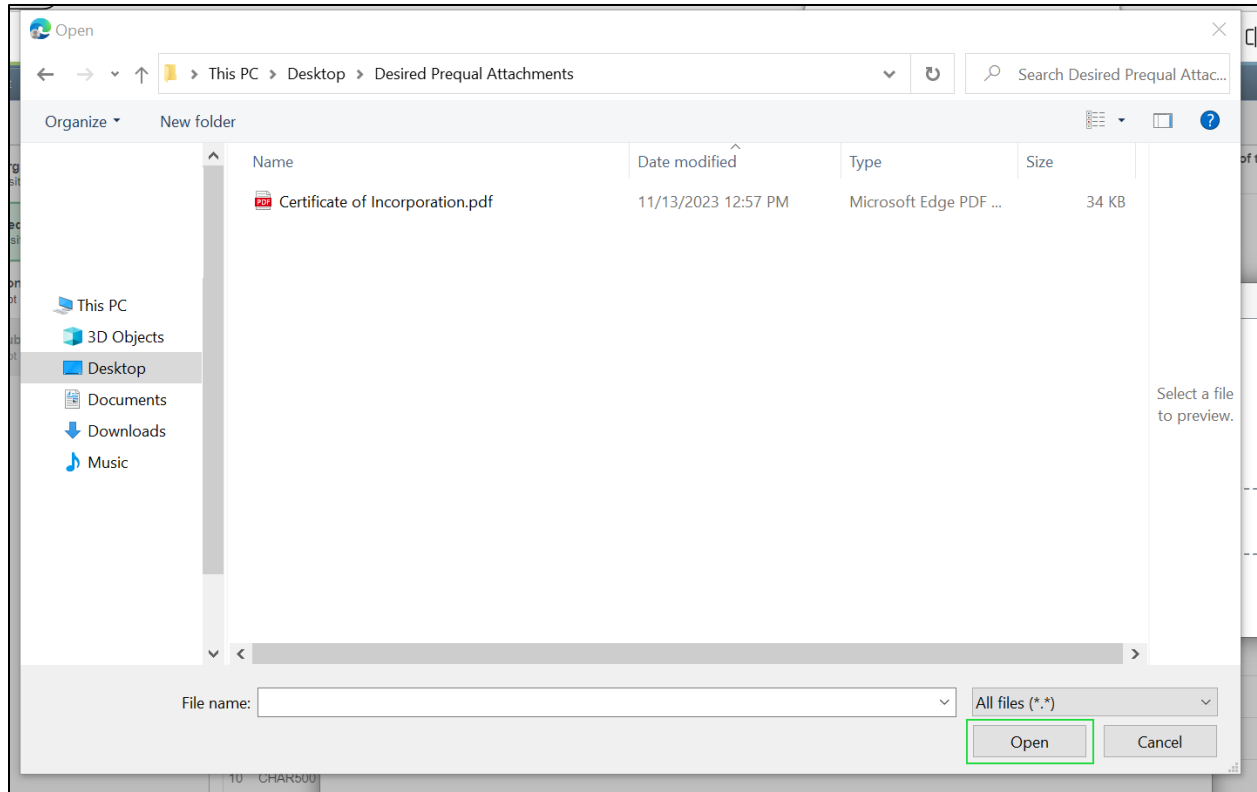
## SFS Handbook: Grantee Processing in SFS

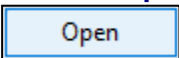


Step	Action
26.	Navigate to the directory location and <b>select</b> the applicable document for attachment.

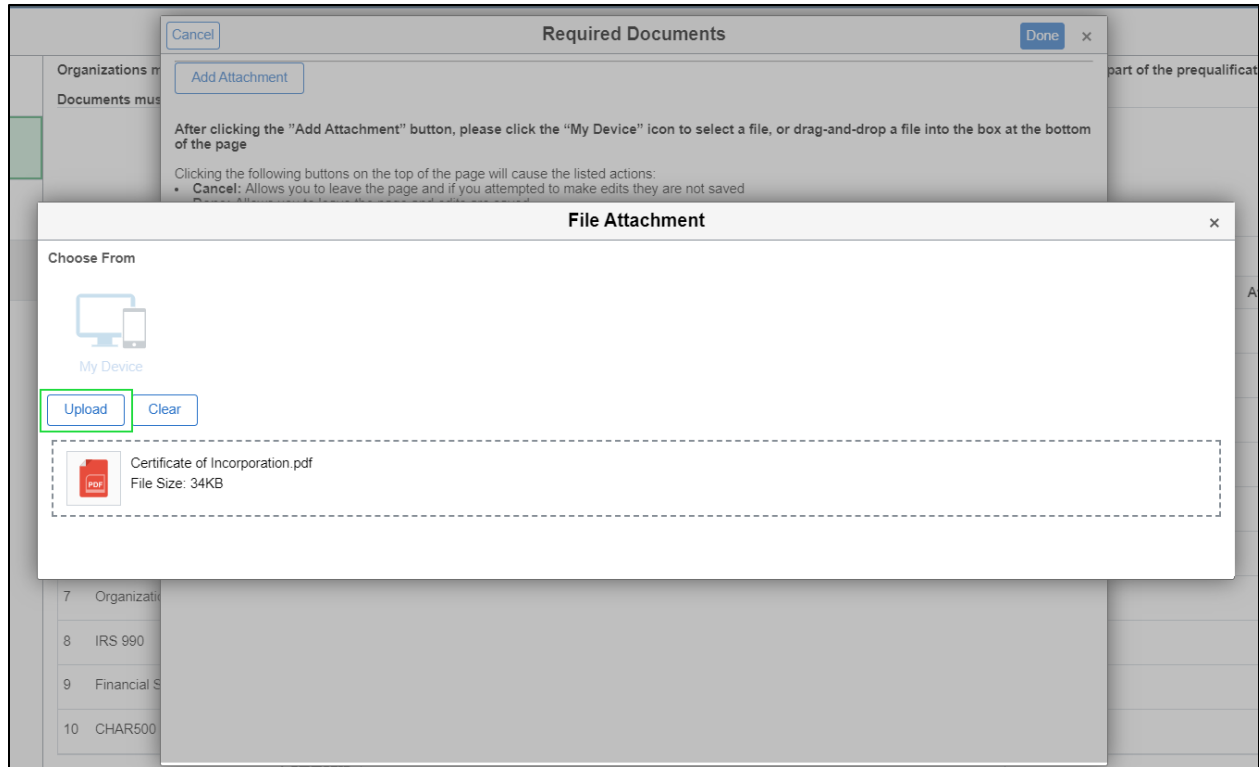


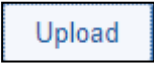
## SFS Handbook: Grantee Processing in SFS



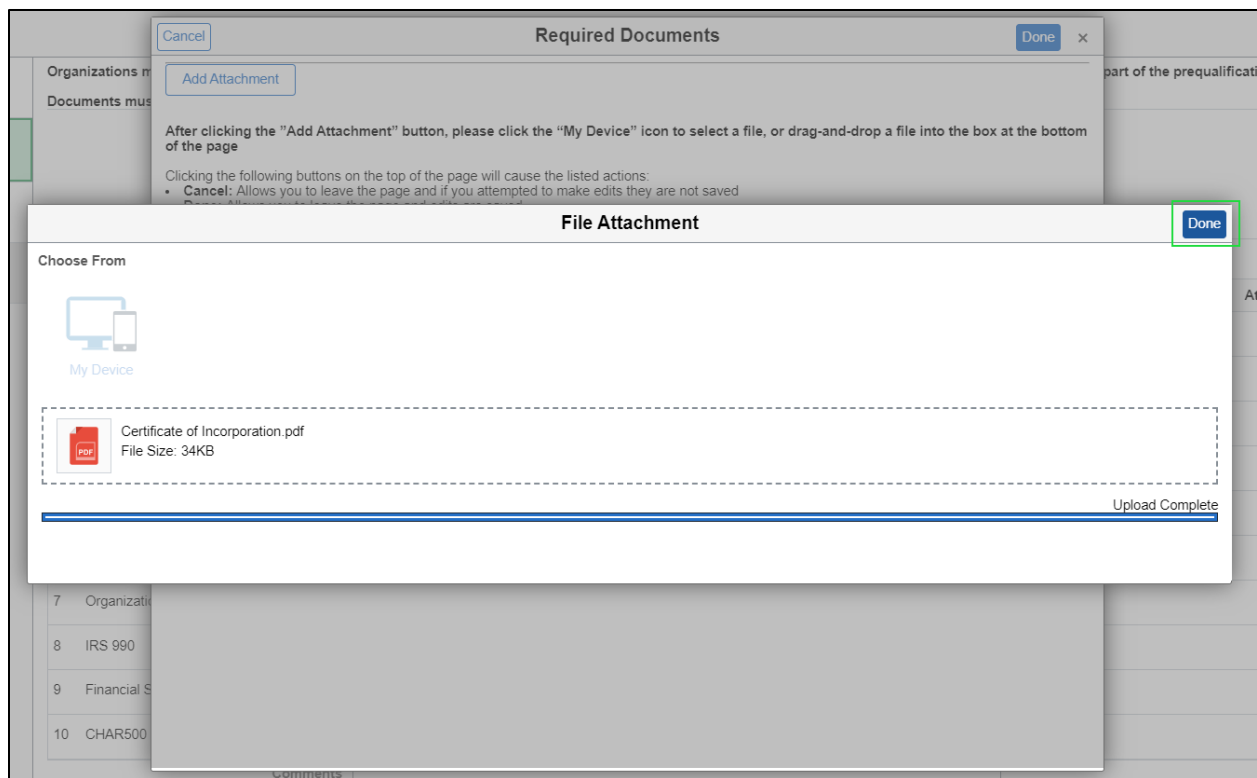
Step	Action
27.	Click the <b>Open</b> button. <div></div>


## SFS Handbook: Grantee Processing in SFS



Step	Action
28.	Click the <b>Upload</b> button. 

## SFS Handbook: Grantee Processing in SFS



Step	Action
29.	Click the <b>Done</b> button. 

## SFS Handbook: Grantee Processing in SFS

Required Documents

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

[Add Attachment](#)

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

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

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

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

# SFS Handbook: Grantee Processing in SFS

Cancel

Required Documents

Done

File Name

Application ID

SetID

Supplier ID

Version Number

Description

User ID

Date/Time Stamp

Certificate\_of\_Incorporation.pdf

000016146

SHARE

1000051400

1

11/13/2023 1:14:46P

Add Attachment

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

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

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

Step	Action
31.	Click the <b>Done</b> button.

Exit

Prequalification Application

Previous

Next

Organization Information

Visited

Required Documents

Visited

Contacts

Not Started

Submit

Not Started

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

Supplier ID 1000051400

Supplier Name HOPE PROGRAM INC

Save For Later

Attachments

10 rows

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

Comments

## SFS Handbook: Grantee Processing in SFS

Step	Action
32.	Follow the same process to add attachments for any additional rows, using the <a href="#">Attach</a> link.

Prequalification Application

Organization Information Visited

Required Documents Visited

Contacts Not Started

Submit Not Started

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

Supplier ID 1000051400

Supplier Name HOPE PROGRAM INC

Save For Later

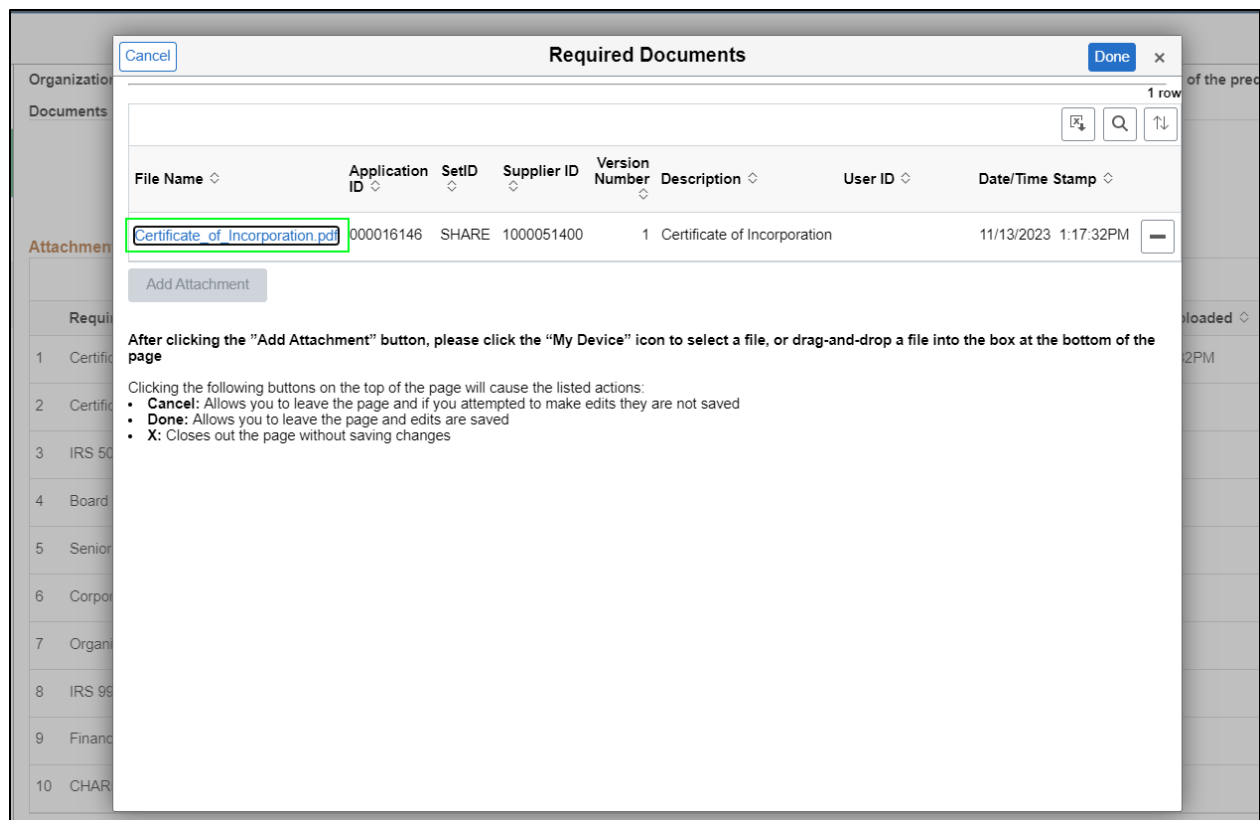
Attachments

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

Comments

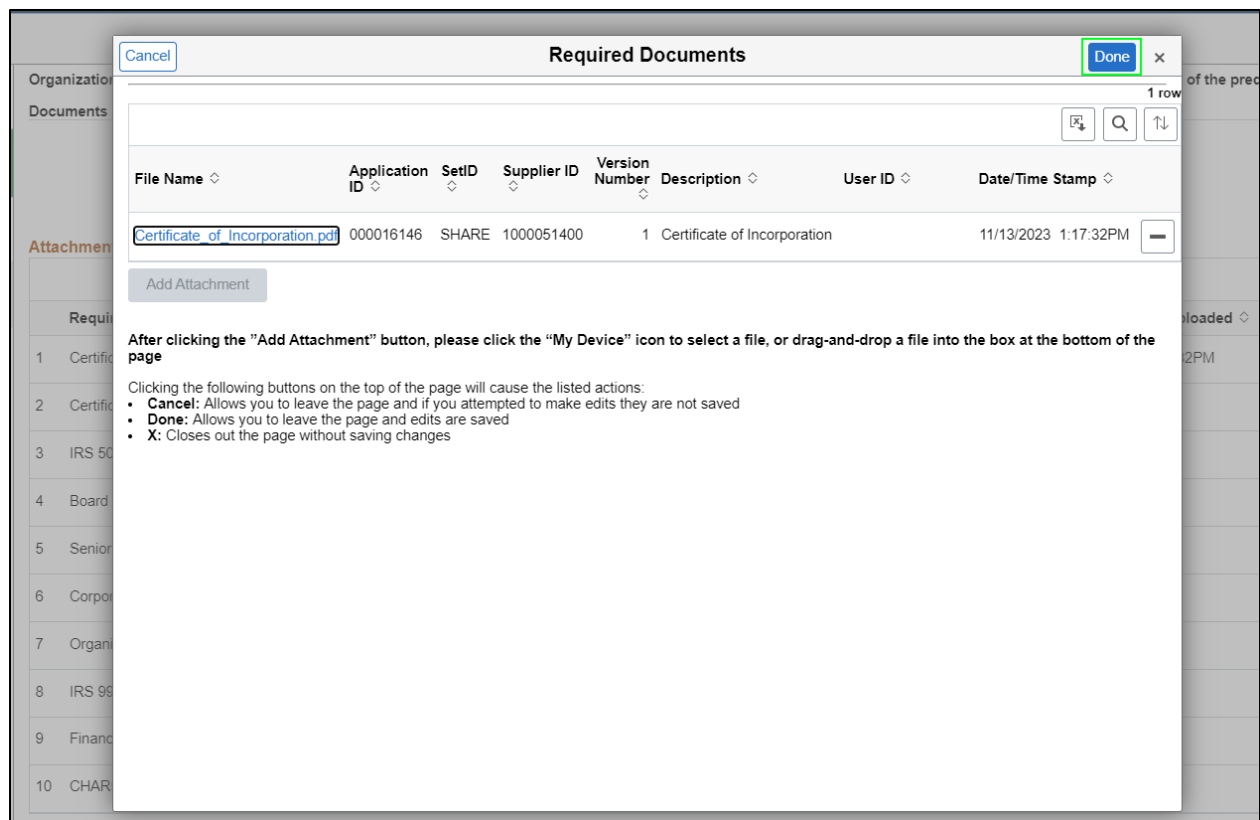
Step	Action
33.	To view an existing attachment, click the <a href="#">View/Delete</a> button.  <b>Note:</b> If the <b>View/Delete</b> button is not active, then a document hasn't been attached.

## SFS Handbook: Grantee Processing in SFS



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

## SFS Handbook: Grantee Processing in SFS



Step	Action
35.	When you are finished viewing attachments, click the <b>Done</b> button.



# SFS Handbook: Grantee Processing in SFS

Exit

Prequalification Application

Previous

Next

Organization Information

Visited

Required Documents

Visited

Contacts

Not Started

Submit

Not Started

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

Supplier ID 1000051400

Supplier Name HOPE PROGRAM INC

Save For Later

Attachments

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

Comments

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

Exit

Prequalification Application

Previous

Next

Organization Information

Visited

Required Documents

Visited

Contacts

Not Started

Submit

Not Started

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

Supplier ID 1000051400

Supplier Name HOPE PROGRAM INC

Save For Later

Attachments

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

Comments

# SFS Handbook: Grantee Processing in SFS

Step	Action
37.	Click the <b>Attach with Additional Date Details</b> link.

**Attach with Additional Date Details**

IRS990 General Instructions

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

CHAR500 or CHAR410 General Instructions

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

Audit/Review & Findings General Instructions

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

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

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

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

View	Application ID	Version Number	SetID	Supplier ID
View				

**Add Attachment**

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

**Attach with Additional Date Details**

IRS990 General Instructions

- Nonprofits must upload their most recent IRS990. If an organization has yet to file its initial IRS990 it should upload a statement detailing the date it was established and the tax year to be covered by the first filing.
- Enter the Tax Year Begin and End dates and the Date Next 990 Due Field will automatically populate.
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CHAR500 or CHAR410 General Instructions

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

Audit/Review & Findings General Instructions

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

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

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- Done: Allows you to leave the page and edits are saved
- X: Closes out the page without saving changes

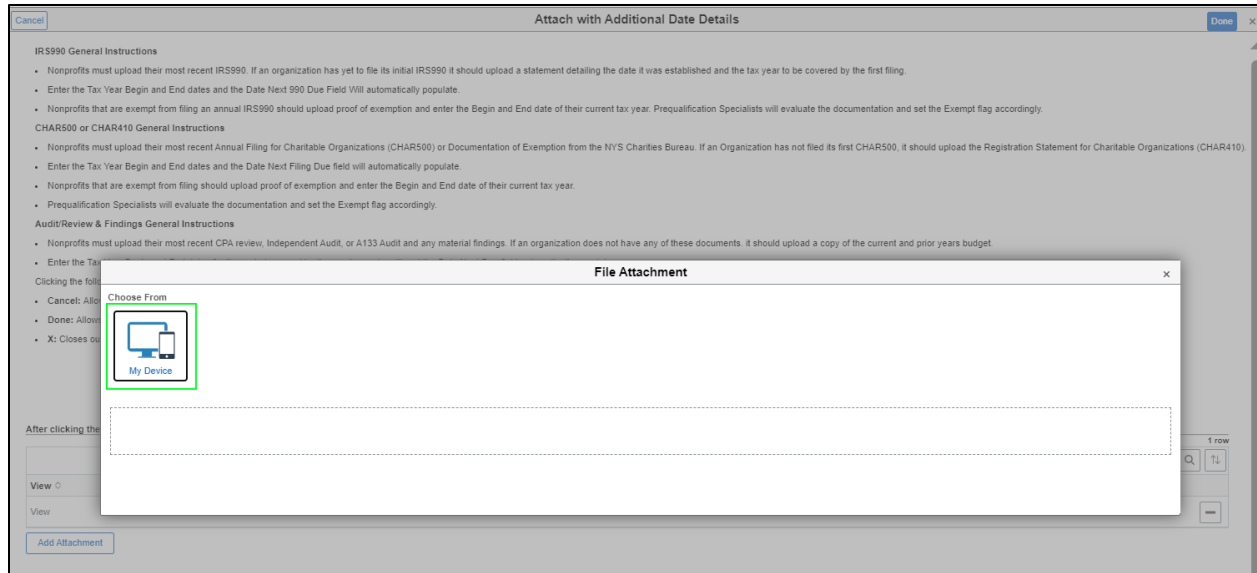
After clicking the "Add Attachment" button, please click the "My Device" icon to select a file, or drag-and-drop a file into the box at the bottom of the page

View	Application ID	Version Number	SetID	Supplier ID
View				

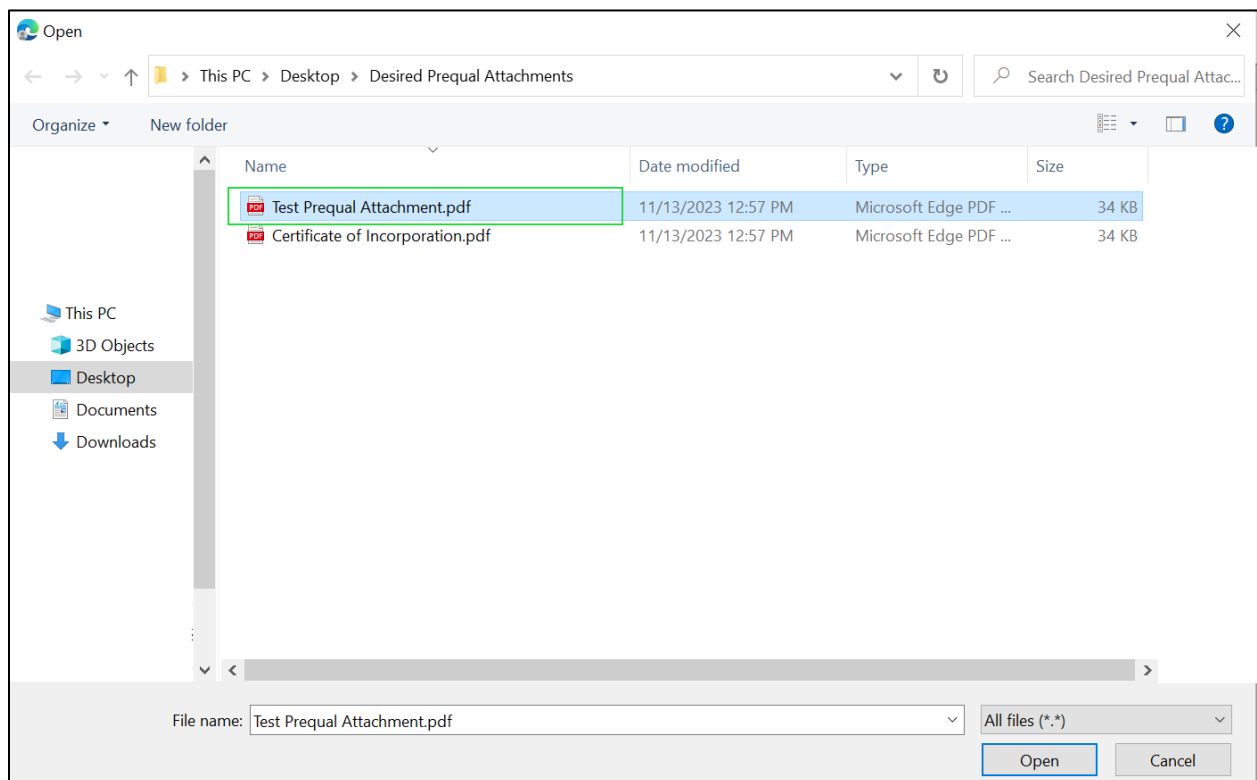
**Add Attachment**

Step	Action
39.	Click the <b>Add Attachment</b> button.

## SFS Handbook: Grantee Processing in SFS

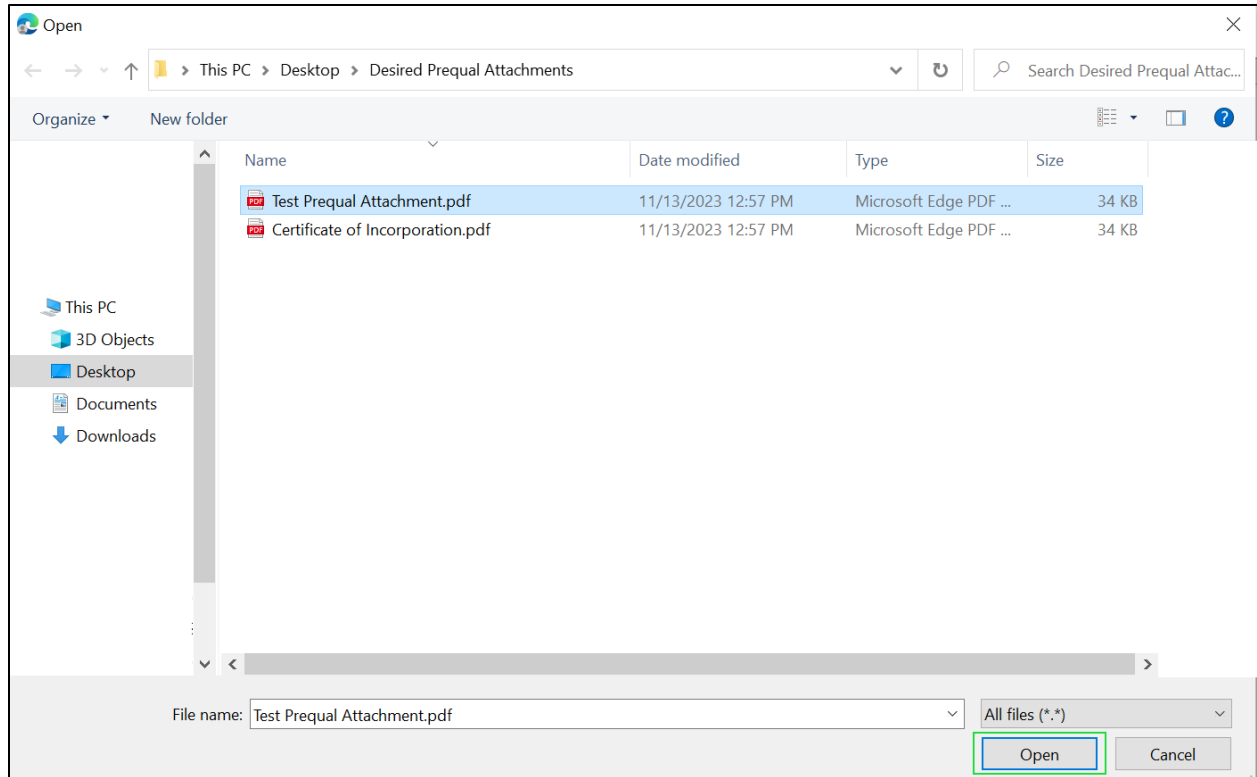


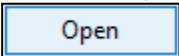
Step	Action
40.	Click the <b>My Device</b> button.

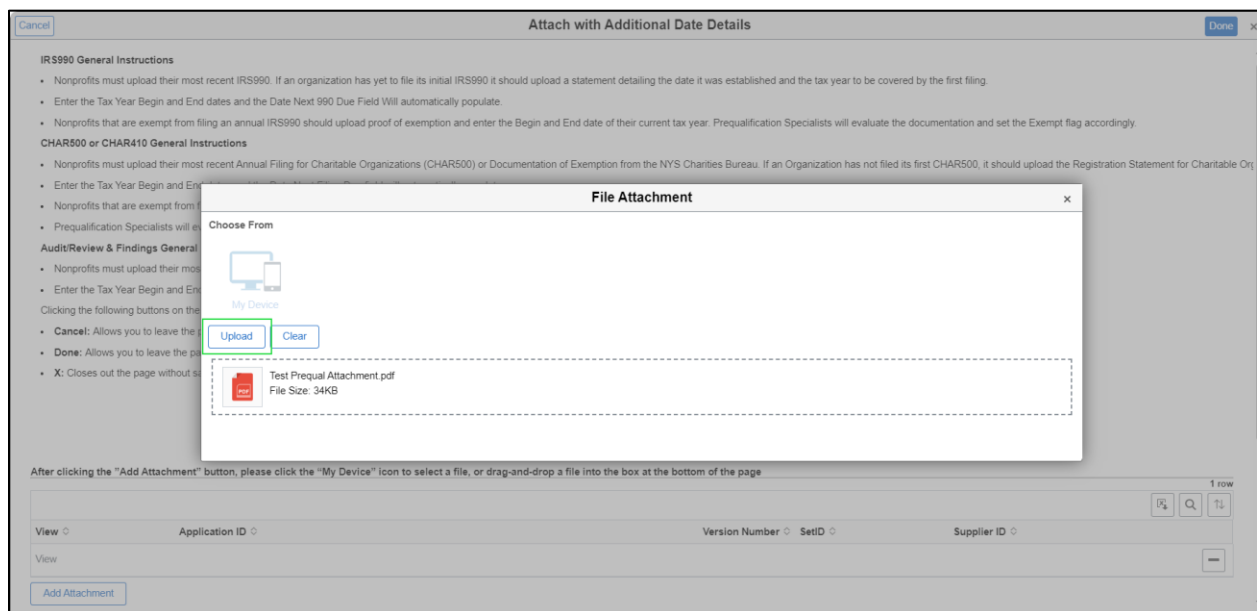


Step	Action
41.	Navigate to the directory location and select the applicable document for attachment.

## SFS Handbook: Grantee Processing in SFS

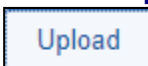


Step	Action
42.	Click the <b>Open</b> button. 



# SFS Handbook: Grantee Processing in SFS

Step	Action
43.	Click the <b>Upload</b> button.



**Attach with Additional Date Details**

**IRS990 General Instructions**

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

**CHAR500 or CHAR410 General Instructions**

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

**Audit/Review & Findings General Instructions**

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

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

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

**File Attachment**

Choose From

My Device

Test Prequal Attachment.pdf  
File Size: 34KB

Upload Complete

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

View	Application ID	Version Number	SetID	Supplier ID
View				

Add Attachment

Step	Action
44.	Click the <b>Done</b> button.



**Attach with Additional Date Details**

**IRS990 General Instructions**

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

**CHAR500 or CHAR410 General Instructions**

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

**Audit/Review & Findings General Instructions**

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

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

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- Done:** Allows you to leave the page and edits are saved
- X:** Closes out the page without saving changes

**File Attachment**

Choose From

My Device

Test Prequal Attachment.pdf  
File Size: 34KB

Upload Complete

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

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

Add Attachment

Date Next Due

Tax Year Begin Date 01/01/2023

State Adjusted Due Date

Tax Year End Date 12/31/2023

State Adjusted Due Date Reason

## SFS Handbook: Grantee Processing in SFS

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

Cancel

Attach with Additional Date Details

Done

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

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

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

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

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

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

Add Attachment

Date Next Due

Tax Year Begin Date 01/01/2023

State Adjusted Due Date

Tax Year End Date 12/31/2023

State Adjusted Due Date Reason

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

Cancel

Attach with Additional Date Details

Done

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

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

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

- Cancel:** Allows you to leave the page and if you attempted to make edits they are not saved
- Done:** Allows you to leave the page and edits are saved
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After clicking the "Add Attachment" button, please click the "My Device" icon to select a file, or drag-and-drop a file into the box at the bottom of the page

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

Add Attachment

Date Next Due


Tax Year Begin Date 01/01/2023

State Adjusted Due Date

Tax Year End Date 12/31/2023

State Adjusted Due Date Reason

## SFS Handbook: Grantee Processing in SFS

Step	Action
47.	Click the <b>Done</b> button. 

**Prequalification Application**

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

Supplier ID: 1000051400

Supplier Name: HOPE PROGRAM INC

[Save For Later](#)

**Attachments**

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

Comments:

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

# SFS Handbook: Grantee Processing in SFS

Prequalification Application

Organization Information Visited

Required Documents Visited

Contacts Not Started

Submit Not Started

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

Supplier ID 1000051400

Supplier Name HOPE PROGRAM INC

Save For Later

Attachments 10 rows

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

Comments

Step	Action
49.	Click the <b>Next</b> button.



Prequalification Application

Organization Information Visited

Required Documents Visited

Contacts Visited

Submit Not Started

Identify the contact information for your organization.

Supplier ID 1000051400

Save For Later

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

Add Contacts



## SFS Handbook: Grantee Processing in SFS

Step	Action
50.	<p>Click the <b>Add Contacts</b> button to add a contact person from your organization who should receive email notifications regarding the prequalification application and who the agency can contact if they have questions about the prequalification application.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;">Add Contacts</div> <p><b>Note:</b> There will be system email notifications to the grantee contact(s) when their prequalification application is Submitted, Approved, Requested for More Information, Expired, or Due to Expire.</p>

Cancel
**Add New Contact**
Done x

---

**Contact Information**

Description

\* First Name

\* Last Name

Title

\*Email Id

\*Telephone

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

Fax Number

Contact Type

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

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

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

## SFS Handbook: Grantee Processing in SFS

Cancel
Add New Contact
Done x

**Contact Information**

Description

\* First Name

\* Last Name

Title

\*Email Id

\*Telephone

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

Fax Number

Contact Type

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

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

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

Cancel
Add New Contact
Done x

**Contact Information**

Description

\* First Name

\* Last Name

Title

\*Email Id

\*Telephone

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

Fax Number

Contact Type

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

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

## SFS Handbook: Grantee Processing in SFS

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

Cancel
Add New Contact
Done

**Contact Information**

Description

\* First Name

\* Last Name

Title

\*Email Id

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

Fax Number

Contact Type

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

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

Step	Action
57.	Click the <b>Done</b> button.

Exit
Prequalification Application
Previous
Next

Organization Information Visited
Required Documents Visited
**Contacts Visited**
Submit Not Started

Identify the contact information for your organization.

Supplier ID 1000051400

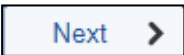
Save For Later

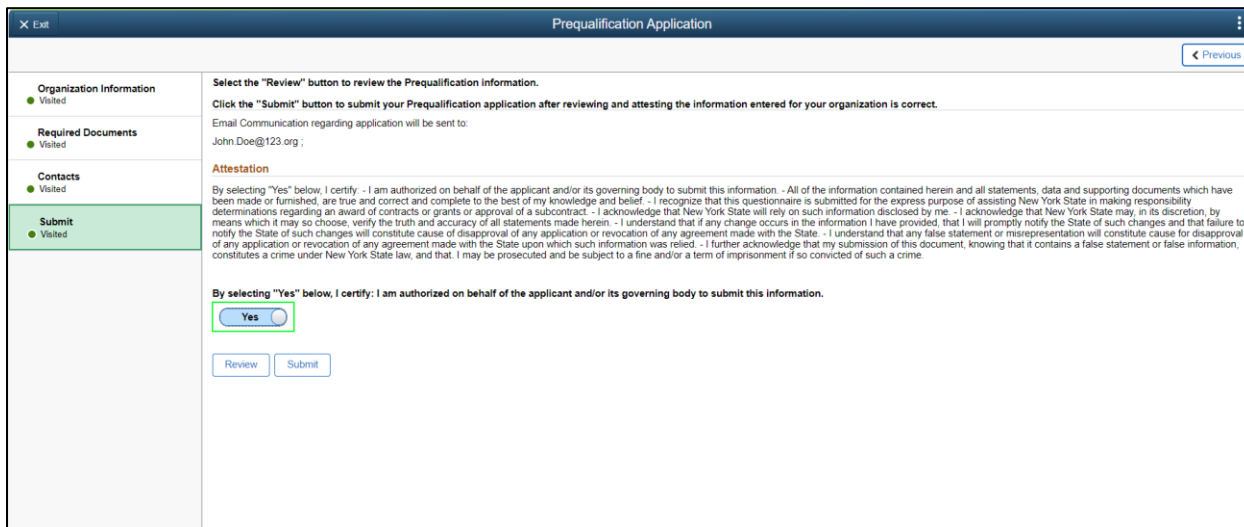
1 row

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

Add Contacts

## SFS Handbook: Grantee Processing in SFS

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



Prequalification Application

Organization Information Visited

Required Documents Visited

Contacts Visited

Submit Visited

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

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

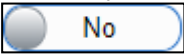
Email Communication regarding application will be sent to:  
John.Doe@123.org ;

**Attestation**

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

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

☒ Yes


Step	Action
60.	On the <b>Submit</b> 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 <b>Attestation</b> toggle option to <b>Yes</b> .   <b>Note:</b> If you made additional changes to the application after clicking <b>Yes</b> , then you will need to reset the application before submitting by toggling back to <b>No</b> and then back to <b>Yes</b> .

# SFS Handbook: Grantee Processing in SFS

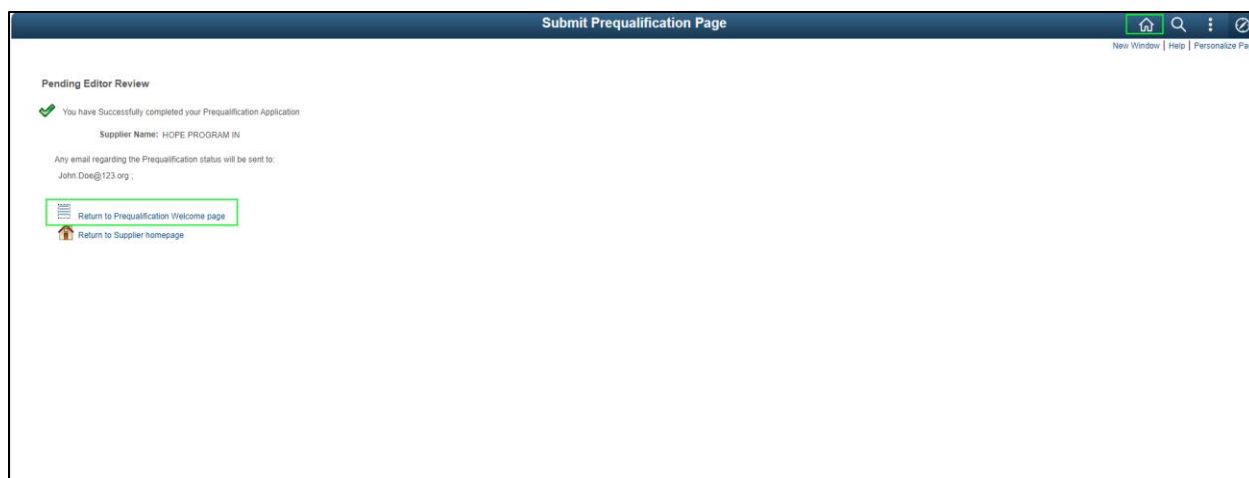
The screenshot shows the 'Prequalification Application' window. On the left sidebar, the 'Submit' button is highlighted with a green border. The main content area contains instructions to review the information and a 'Submit' button at the bottom.

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

The screenshot shows the 'Prequalification Application' window. In the main content area, the 'Submit' button is highlighted with a green border. The left sidebar shows the 'Submit' button as 'Visited'.

Step	Action
63.	To submit the application for agency review, click the <b>Submit</b> button.  

## SFS Handbook: Grantee Processing in SFS



Step	Action
64.	The application is routed for review to the agency you selected in the State Agency field, on the <b>Organization Information</b> section.  <b>Note:</b> 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 <b>Prequalification Welcome</b> page, click the <b>Return to Prequalification Welcome page</b> link or click the <b>Home</b> icon in the upper right corner of the page to return to the SFS Vendor Portal homepage.
66.	You have successfully completed the <b>Enter and Submit a Prequalification Application</b> topic.

## Responding to Bid Events (Grant Opportunities)

### Lesson Description:

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

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

### Lesson Objectives:

In this lesson, you will learn how to:

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

## Respond to Bid Event Expenditure Budget Types

# SFS Handbook: Grantee Processing in SFS

## Topic Description:

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

## Topic Objectives:

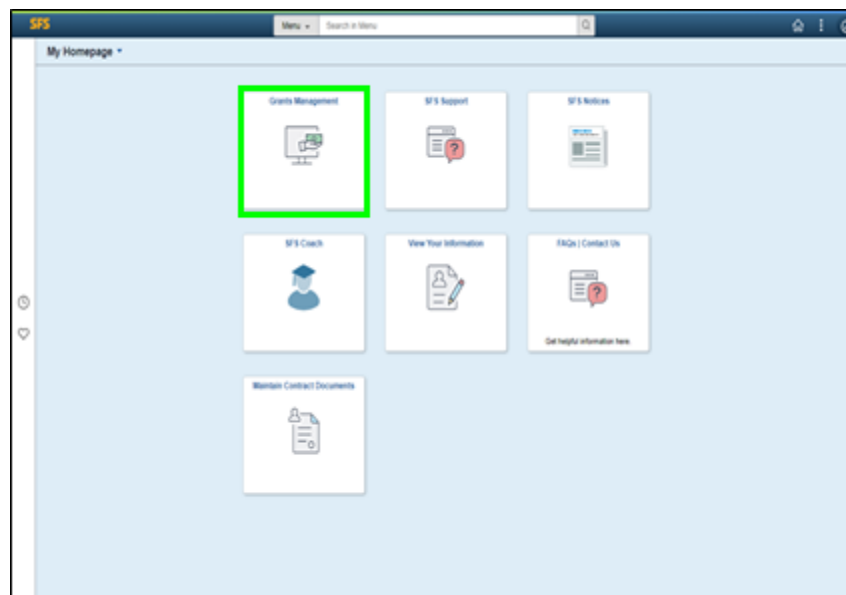
In this topic, you will learn:


- How to respond to Bid Event Expenditure Budget Types

## Procedure

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

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



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


## SFS Handbook: Grantee Processing in SFS



Step	Action
2.	Click the <b>Bid Event Search</b> tile.

The screenshot shows the 'View Events and Place Bids' page. The 'Search Criteria' section is highlighted with a green border. It includes fields for Event ID, Search by Grant Opportunity, Search by Due Date (From/To), Search by Status (set to Available), Search by Eligibility (set to Not-For-Profit), Search by Funding Agency, and Search by Service Area. A 'Search' button is highlighted with a green border. Below the search criteria, the 'Search Results' table is displayed, showing one result with Event ID EVT0000082 highlighted.

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

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



# SFS Handbook: Grantee Processing in SFS

The screenshot shows the 'Event Details' page for event 101123 TEST-4. The 'Bid on Event' button is highlighted with a green border. The page includes a header with 'Supplier Search Events' and 'Event Details'. A welcome message for 'CHILD CARE SOLUTIONS INC' is visible. The event details section lists the event name, ID, format, round, version, start and end dates, and a description 'GRANTS'. It also shows contact information and payment terms. A 'Bidding Shortcuts' section on the right provides links for 'View Event Activity', 'View Event Package', and 'Upload XML Bid Response'. At the bottom, there are links for 'Lines', 'Bid Required', and 'Line Comments/Files'.

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

The screenshot shows the 'Event Details' page with the 'Additional Bid Info' section highlighted in green. This section includes fields for 'Event Name', 'Event ID', 'Event Format/Type', 'Event Round', 'Event Version', 'Event Start Date', 'Event End Date', 'Processing Status', 'Bid ID', 'Bid Date', 'Bid Currency', 'Estimated Award Date', and 'Anticipated Contract Date'. The 'Event Start Date' is 10/11/2023 1:46PM EDT, 'Event End Date' is 10/20/2023 01:46 PM EDT, 'Estimated Award Date' is 09/30/2023, and 'Anticipated Contract Date' is 10/01/2023. The 'Processing Status' is 'Bid Event Published'. The 'Additional Bid Info' section is also highlighted with a green border. The page includes a header with 'Search Event Details' and 'Event Details'. A welcome message for 'CHILD CARE SOLUTIONS INC' is visible. The event details section lists the event name, ID, format, round, version, start and end dates, and a description 'GRANTS'. It also shows contact information and payment terms. A 'Bidding Instructions' section on the right provides links for 'View Event Activity', 'View Event Package', and 'Upload XML Bid Response'. At the bottom, there are links for 'Lines', 'Bid Required', and 'Line Comments/Files'.

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

## SFS Handbook: Grantee Processing in SFS

Step	Action
8.	Click the <b>Additional Bid Info</b> link.

**Additional Bid Response fields**

**Additional Bid Response Info**

Organization Type	Not-For-Profit	<input type="checkbox"/> Letter of Intent
Taxpayer Identification Number	161057376	Questions & Answers Post Type
Bidders Conference Application	Workshop	Provide a Link
Contract Type	Fixed	<a href="#">Questions &amp; Answers Link</a>
Length		Questions and Answers Upload
Narrative	N/A	Questions and Answers Narrative
		Q&A

OK
Cancel

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

**Step 2: Enter Line Bid Responses**

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

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

[Hide Line Detail](#)

★ Bid Required      🗨 Line Comments/Files

**Lines**

☐

1-1 of 1

View All

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

**Event Comments and Attachments**

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

Submit Bid
Save for Later
Validate Entries

[Return to Event Search](#)

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

# SFS Handbook: Grantee Processing in SFS

**Event Comments and Attachments**

[Help](#)

Business Unit OMH01    Event ID EVT0000082    Event Round: 1    Event Version: 1

**Attachments**  
[View Event Attachments](#) ?

1-1 of 1

Attached File	Attachment Description	Event RFx Doc	Upload	View
		<input type="checkbox"/>	<a href="#">Upload</a>	<a href="#">View</a>

[Add New Attachments](#) ?

1-2 of 2

Attached File	Attachment Description	Upload	View	
Instructions_document.pdf		<a href="#">Upload</a>	<a href="#">View</a>	<a href="#">Add New Attachments</a> <a href="#">Delete</a>
Reporting_Template.pdf		<a href="#">Upload</a>	<a href="#">View</a>	<a href="#">Add New Attachments</a> <a href="#">Delete</a>

**Comments**  
[Add New Comments](#) ?

Please review attached instructions before responding to bid event.

[OK](#)

[Cancel](#)

Step	Action
11.	Click the <b>OK</b> button after viewing the instructions, attachments, and comments.

Search Event Details
Event Details

Event Name 101123 TEST-4  
 Event ID OMH01-EVT0000082  
 Event Format/Type Sell Event  
 Event Round 1  
 Event Version 1  
 Event Start Date 10/11/2023 1:46PM EDT  
 Event End Date 10/26/2023 01:46 PM EDT  
 Processing Status Bid Event Published

Additional Bid Info  
 Bid ID New  
 Bid Date  
 Bid Currency USD US Dollar  
 Estimated Award Date  
 Anticipated Contract Date

Description:  
 GRANTS

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

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

**Step 1: Answer General Event Questions**  
 The event administrator requests your response to questions not specific to any specific item.  
 General Event Questions 1  
 Required Questions 1  
 Questions Responded To 0

**Bidder Contact Information**  
 Name  
 Telephone  
 Email  
 Site/Project Address

## SFS Handbook: Grantee Processing in SFS

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

Bid Response address fields

×

[Help](#)

Site/Project Address

Q

|

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◀

1 of 1

▶

▶

|

View All

+

-

Address Line 1

10 Tester Lane

Address Line 2

City

Albany

Postal Code

12222

State

NY

OK

Cancel

Step	Action
17.	Enter <b>Address Details</b> , including the following information: <ul style="list-style-type: none"> <li>• <a href="#">Address Line 1</a></li> <li>• <a href="#">Address Line 2</a> (if applicable)</li> </ul>

## SFS Handbook: Grantee Processing in SFS

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

The screenshot shows the 'Event Details' page in the SFS system. The 'Event Questions' section is active, displaying a list of questions. The first question, 'Applicant must be a 501c3 organization to apply', is marked as 'Required' (indicated by a red star) and has a 'Response' field with a dropdown menu showing 'Yes'. The second question, 'Describe why your organization is qualified to implement the proposed program model outlined in Section III Program Model Description. Include both quantitative and qualitative evidence to address this question and experience with engaging with PWUD and priority population(s)', is also marked as 'Required' and has a 'Response' field with a text area containing the text 'My organization is qualified because...'. The page includes navigation links like 'Search Event Details' and 'Event Details' at the top, and a 'Hide Event Questions' link on the left.

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

## SFS Handbook: Grantee Processing in SFS

**Event Details**

Event Name: 101123 TEST-4  
 Event ID: OMH01-EVT0000082  
 Event Format/Type: Sell Event  
 Event Round: 1  
 Event Version: 1  
 Event Start Date: 10/11/2023 1:48PM EDT  
 Event End Date: 10/26/2023 01:48 PM EDT  
 Processing Status: Bid Event Published

**Bidding Instructions**

Bid ID: 1  
 Bid Date:  
 Bid Currency: USD US Dollar  
 Estimated Award Date:  
 Anticipated Contract Date:

**Description:**  
 GRANTS

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

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

Step	Action
20.	Click the <b>Save for Later</b> button.

The bid is not complete. (18058,342)

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

**OK** Cancel

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

# SFS Handbook: Grantee Processing in SFS

How many employees does your organization employ?

Response: 100 Weighting: 100.00000

Best: 0 Worst: 0

**Step 2: Enter Line Bid Responses**

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

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

[Hide Line Detail](#)

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

**Lines**

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

[Event Comments and Attachments](#)

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

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

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

**Create Bids**

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

**Bid Event Periods**

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

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

[Bid Event Line# 1](#)

[Return to Bid Response](#)

Step	Action
23.	Click the <b>Budget properties</b> link.

# SFS Handbook: Grantee Processing in SFS

Budget Properties Header

Event ID

EVT0000082

Max Award Amount

500000.000

Bid Event Period

1

Period From Date

10/01/2023

Bidder/Vendor ID

1000015277

Period To Date

09/30/2024

Budget Type

EXPENDITURE

Budget Properties

Apply Match

Allowed at Category I

Calculate Match

Grant Fund

Include Match Worksheet

Match Worksheet

Budget Category Properties

1-5 of 10

View All

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

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













## SFS Handbook: Grantee Processing in SFS

Narrative

**Period Budget Summary**

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

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

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

## SFS Handbook: Grantee Processing in SFS

x
Help

Budget Type EXPENDITURE

Budget Category SALARY

Match % Required

**Category Details**

1-1 of 1

View All

	Grant Funds	Match Funds	Match %	Other funds	Total Funds	Position Title	Annual Salary I Position
1	<input style="width: 100%;" type="text"/>					<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>

**Category Totals**

Cumulative Grant Funds 0.00

Cumulative Match Funds 0.00

Cumulative Other Funds 0.00

Cumulative Category Details Totals 0.00


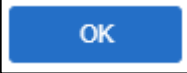
Narrative

OK

Cancel

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

## SFS Handbook: Grantee Processing in SFS

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

## SFS Handbook: Grantee Processing in SFS

Budget Properties Header

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

Narrative

**Period Budget Summary**

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

**Sub Totals**

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

Back
Save

Step	Action
45.	Click the <b>Save</b> button.
46.	Click the <b>Back</b> button.

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

Business Unit: OIM-H01  
 Event ID: EVT0000082  
 Bidder SetID: SHARE

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

**Bid Event Periods**

Period: 1

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

☐ Budget Required
 [Budget properties](#)

☐ Work Plan Required
 Work Plan Properties

Bid Event Line# 1

<Return to Bid Response

Step	Action
47.	Click the <b>Work Plan Properties</b> link.

# SFS Handbook: Grantee Processing in SFS

**Work Plan**

**Work Plan Header**

Event ID: EVT0000082 Business Unit: OMH01 WorkPlan ID: EVT0000082-R1V1P1-1000015277-169 Bidder ID: 1000015277  
 Period From: 10/01/2023 Period To: 09/30/2024 Period: 1  
 Allow Bidder Defined Objective and Tasks: ☒  
 Maximum Number of:  
 Objectives: 50  
 Tasks: 100  
 Performance Measures: 300  
 Online Work Plan Required: ☐  
 Project Summary: Help reduce drug deaths.

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

**Objectives >> Tasks >> Performance Measures**

Display Type: All

1-4 of 4 View All

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

Back Save Refresh

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

## SFS Handbook: Grantee Processing in SFS

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

Objectives >> Tasks >> Performance Measures ?

Objective Task Perf. Measure Display Type: All

1-5 of 5 View All

Basic Info More Details

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

Objective Task Perf. Measure Display Type: All

Back Save Refresh

Step	Action
55.	Select the <b>Objective</b> row where the task will be added.
56.	Click <b>+ Task</b> button.
57.	Enter the applicable information on the <b>Task</b> row, in the <b>Name</b> field.  On the <b>Task</b> row, in this example we will enter <b>Distribute 72 naran kits to trained community members</b> in the <b>Name</b> field.
58.	Enter the applicable information on the <b>Task</b> row, in the <b>Description</b> field.  On the <b>Task</b> row, in this example we will enter <b>Distribute 72 naran kits to trained community members</b> in the <b>Description</b> field.

# SFS Handbook: Grantee Processing in SFS

Objectives >> Tasks >> Performance Measures

Objective Task Perf. Measure Display Type: All

1-6 of 6 View All

Basic Info More Details

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

Objective Task Perf. Measure Display Type: All

Back Save Refresh

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

# SFS Handbook: Grantee Processing in SFS

Objectives >> Tasks >> Performance Measures

Objective Task Perf. Measure Display Type: All

1-6 of 6 View All

Basic Info More Details **||>**

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

Objective Task Perf. Measure Display Type: All

Back Save Refresh

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

Event Bid Period Create Bids

Paragraph A<sup>2</sup> A<sup>1</sup> A<sup>0</sup> B I U S Display Type: All

ug deaths.

Performance Measures

Perf. Measure Display Type: All

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

Perf. Measure Display Type: All

Back Save Refresh

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



## SFS Handbook: Grantee Processing in SFS

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

Step	Action
68.	Click the <b>Return to Bid Response</b> link.

**Step 2: Enter Line Bid Responses**

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

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

[Hide Line Detail](#)

★ Bid Required      Line Comments/Files

**Lines**

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

[Event Comments and Attachments](#)

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

## SFS Handbook: Grantee Processing in SFS

Step	Action
69.	<b>Note:</b> The amount entered in the <b>Your Unit Bid Price</b> 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 <b>20,000</b> in the <b>Your Unit Bid Price</b> field.
70.	When you are ready to submit your bid response, click the <b>Submit Bid</b> button.

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

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

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

## Respond to Bid Event Performance Budget Types

### Topic Description:

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

### Topic Objectives:

In this topic, you will learn:

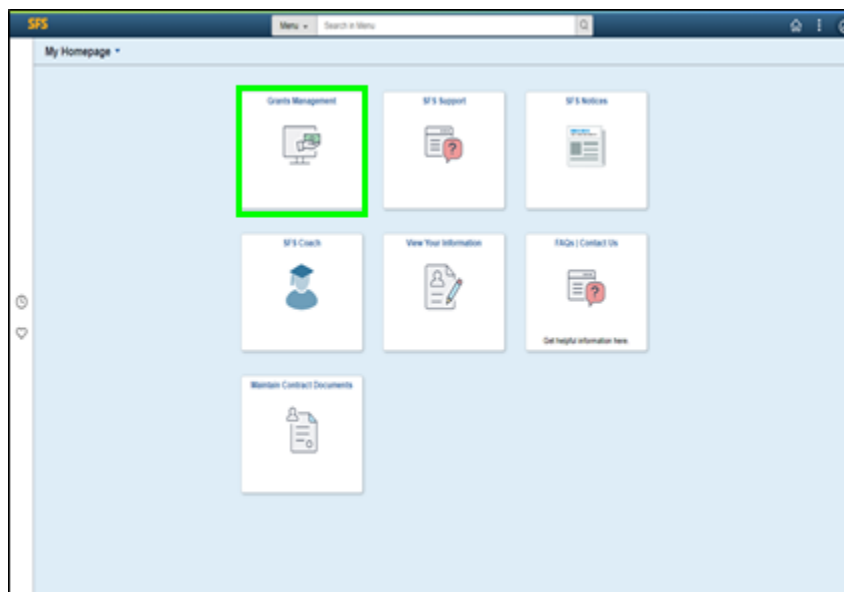
- How to respond to a Bid Event Performance Budget Types


### Procedure

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

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

## SFS Handbook: Grantee Processing in SFS



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



Step	Action
2.	Click the <b>Bid Event Search</b> tile.

# SFS Handbook: Grantee Processing in SFS

Grants Management

View Events and Place Bids

View Events and Place Bids

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

Welcome, CHILD CARE SOLUTIONS INC

User: Child Care Solutions

Search Criteria

Event ID

Search by Grant Opportunity

Search by Due Date

From

To

Search by Status

Search by Eligibility

Search by Funding Agency

Search by Service Area

Search

Clear Criteria

Search Results

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

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

# SFS Handbook: Grantee Processing in SFS

The screenshot shows the 'Event Details' page for '101123 TEST-4'. The 'Bid on Event' button is highlighted with a green box. The page includes a header with 'Supplier Search Events' and 'Event Details'. The main content area displays event information such as Event ID, Event Name, Event Format/Type, Event Round, Event Version, Event Start Date, and Event End Date. There are also links for 'Accept Invitation', 'View Event Activity', 'View Event Package', and 'Upload XML Bid Response'. The 'Event Description' field contains the text 'GRANTS'. The 'Contact' information includes 'Phone', 'Email', and 'Online Discussion'. The 'Payment Terms' section shows 'My Bids' as 0, 'Edits to Submitted Bids' as 'Not Allowed', and 'Multiple Bids' as 'Allowed'. A 'Lines' section at the bottom indicates 'Bid Required' and 'Line Comments/Files'.

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

The screenshot shows a single button labeled 'Bid on Event' with a blue border and a light blue background.

The screenshot shows the 'Event Details' page for '101123 TEST-4'. The 'Additional Bid Info' section is highlighted with a green box. The page includes a header with 'Search Event Details' and 'Event Details'. The main content area displays event information such as Event ID, Event Name, Event Format/Type, Event Round, Event Version, Event Start Date, and Event End Date. There are also links for 'Submit Bid', 'Save for Later', 'Cancel', and 'Validate Entries'. The 'Event Description' field contains the text 'GRANTS'. The 'Contact' information includes 'Phone', 'Email', and 'Online Discussion'. The 'Payment Terms' section shows 'Billing Location' as 'Office of Mental Health', 'Event Currency' as 'Dollar', 'Conversion Rate' as '1.00000000', 'Edits to Submitted Bids' as 'Not Allowed', and 'Multiple Bids' as 'Allowed'. The 'Additional Bid Info' section shows 'Bid ID' as 'New', 'Bid Date' as 'USD', 'Bid Currency' as 'US Dollar', 'Estimated Award Date' as '09/30/2023', and 'Anticipated Contract Date' as '10/01/2023'.

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

## SFS Handbook: Grantee Processing in SFS

Step	Action
8.	Click the <b>Additional Bid Info</b> link.

**Additional Bid Response fields**

**Additional Bid Response Info**

Organization Type	Not-For-Profit	<input type="checkbox"/> Letter of Intent
Taxpayer Identification Number	161057376	Questions & Answers Post Type
Bidders Conference Application	Workshop	Provide a Link
Contract Type	Fixed	<a href="#">Questions &amp; Answers Link</a>
Length		Questions and Answers Upload
Narrative	N/A	Questions and Answers Narrative
		Q&A

OK
Cancel

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

**Step 2: Enter Line Bid Responses**

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

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

[Hide Line Detail](#)

★ Bid Required      📎 Line Comments/Files

**Lines**

☐ ☐

1-1 of 1

View All

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

**Event Comments and Attachments**

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

Submit Bid
Save for Later
Validate Entries

[Return to Event Search](#)

## SFS Handbook: Grantee Processing in SFS

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

Event Comments and Attachments

Business Unit OMH01 Event ID EVT0000082 Event Round: 1 Event Version: 1

Help

Attachments

View Event Attachments ?

Attached File

Attachment Description

Event RFx Doc

Upload

View

☐

Upload

View

Add New Attachments ?

Attached File

Attachment Description

Upload

View

Instructions\_document.pdf

Upload

View

[Add New Attachments](#)

[Delete](#)

Reporting\_Template.pdf

Upload

View

[Add New Attachments](#)

[Delete](#)

Comments

Add New Comments ?

Please review attached instructions before responding to bid event.

OK

Cancel

Step	Action
11.	Click the <b>OK</b> button after viewing the instructions, attachments and comments.

## SFS Handbook: Grantee Processing in SFS

**Event Details**

Event Name: 101123 TEST-4

Event ID: OMH01-EVT0000002

Event Format/Type: Sell Event RFX

Event Round: 1

Event Version: 1

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

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

Processing Status: Bid Event Published

Bidding Instructions

Bid ID: New

Bid Date:

Bid Currency: USD US Dollar

Estimated Award Date:

Anticipated Contract Date:

Hide Additional Event Info

Description:

GRANTS

Contact

Phone:

Email: test123@sfs.ny.gov

Online Discussion

Payment Terms

Billing Location: Office of Mental Health

Event Currency: Dollar

Conversion Rate: 1.00000000

Edits to Submitted Bids: Not Allowed

Multiple Bids: Allowed

**Step 1: Answer General Event Questions**

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

General Event Questions: 1

Required Questions: 1

Questions Responded To: 0

**Bidder Contact Information**

Name:

Telephone:

Email:

DUNS Number:

Organization Website:

User Name: Child Care Solutions

Site/Project Address:

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



## SFS Handbook: Grantee Processing in SFS

Bid Response address fields

×

Help

Site/Project Address

Q

|

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◀

1 of 1

▶

▶

|

View All

+

-

Address Line 1

10 Tester Lane

Address Line 2

City

Albany

Postal Code

12222

State

NY

OK

Cancel

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

## SFS Handbook: Grantee Processing in SFS

**Event Questions**

★ Bid Required    ★ Ideal Response Required

**General Questions** 1 of 2

★ Applicant must be a 501c3 organization to apply

Response: Yes Weighting:

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

Response: My organization is qualified because...

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

**Event Details**

Welcome, CHILD CARE SOLUTIONS INC  
User: Child Care Solutions

Message not found

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

Event Name: 101123 TEST-4    Bidding Instructions

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

Event Format/Type: Sell Event    RFx    Bid Date:

Event Round: 1    Bid Currency: USD    US Dollar

Event Version: 1

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

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

Processing Status: Bid Event Published

[Hide Additional Event Info](#)

Description: GRANTS

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

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

Step	Action
20.	Click the <b>Save for Later</b> button.

## SFS Handbook: Grantee Processing in SFS

The bid is not complete. (18058,342)

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

OK

Cancel

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

Event Details

How many employees does your organization employ?

Response 100 Weighting 100.00000

Best 0 Worst 0

**Step 2: Enter Line Bid Responses**

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

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

Hide Line Detail

\* Bid Required Line Comments/Files

**Lines**

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

Event Comments and Attachments

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

Submit Bid Save for Later Validate Entries

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

Create Bids

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

**Bid Event Periods**

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

Budget properties Work Plan Properties

Return to Bid Response

## SFS Handbook: Grantee Processing in SFS

Step	Action
23.	Click the <b>Budget properties</b> link.

Budget Properties Header

Event ID

EVT0000082

Max Award Amount

500000.000

Bid Event Period

1

Period From Date

10/01/2023

Bidder/Vendor ID

1000015277

Period To Date

09/30/2024

Budget Type

PERFORMANCE

Budget Properties

Apply Match

Allowed at Category

Calculate Match

Grant Fund

☐ Include Match Worksheet

☐ Allow Vendor to Add

☐ Use Other

☐ Overage on Claims

Overage %

Budget Category Properties

1-1 of 1

View All

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

Narrative

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

# SFS Handbook: Grantee Processing in SFS

Budget Properties Header

Event ID: EVT0000082

Bid Event Period: 1

Bidder/Vendor ID: 1000015277

Max Award Amount: 500000.000

Period From Date: 10/01/2023

Period To Date: 09/30/2024

Budget Type: PERFORMANCE

**Budget Properties**

Apply Match: Allowed at Category 1

Calculate Match: Grant Fund

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

Overage %

**Budget Category Properties**

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

Narrative

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

Budget Properties Header

Bid Event Period: 1

Bidder/Vendor ID: 1000015277

Period From Date: 10/01/2023

Period To Date: 09/30/2024

Budget Type: PERFORMANCE

**Budget Properties**

Apply Match: Allowed at Category 1

Calculate Match: Grant Fund

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

Overage %

**Budget Category Properties**

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

Narrative

## SFS Handbook: Grantee Processing in SFS

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

Budget Properties Header

Q

1-2 of 2

View All

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



Narrative

Period Budget Summary

Q

1-2 of 2

View All

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

Sub Totals

Grants Funds 0.00

Match % Calc 0.00

Match Funds 0.00

Other Funds 0.00

Total 0.00

Back

Save

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

## SFS Handbook: Grantee Processing in SFS

**Category Details**
x

[Help](#)

**Budget Type** PERFORMANCE  
**Budget Category** Test Category

**Match % Required**

**Category Details**

1-1 of 1

View All

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

**Category Totals**

Cumulative Grant Funds

0.00

Cumulative Match Funds

0.00

Cumulative Other Funds

0.00

Cumulative Category Details Totals

0.00



**Narrative**

OK

Cancel

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

## SFS Handbook: Grantee Processing in SFS

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



# SFS Handbook: Grantee Processing in SFS

**Budget Properties Header**

1-2 of 2

View All

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

Narrative

**Period Budget Summary**

1-2 of 2

View All

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

**Sub Totals**

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

Back

Save

Step	Action
44.	Click the <b>Save</b> button.
45.	Click the <b>Back</b> button.

[← Bid Search Screen](#)

**Create Bids**

Business Unit OMH01  
Event ID EYT0000082  
Bidder Setid SHARE

Budget Type PERFORMANCE  
Funded Amount 500000.000  
Period 1 Bidder ID 1000015277

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

**Bid Event Periods**

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

☐ Budget Required  
☐ Work Plan Required

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

1 of 1

View All

Bid Event Line# 1

[←Return to Bid Response](#)

Step	Action
46.	Click the <b>Work Plan Properties</b> link.

## SFS Handbook: Grantee Processing in SFS

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

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

# SFS Handbook: Grantee Processing in SFS

Objectives >> Tasks >> Performance Measures ?

Objective Task Perf. Measure Display Type: All

1-5 of 5 View All

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

Objective Task Perf. Measure Display Type: All

Back Save Refresh

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

Objectives >> Tasks >> Performance Measures ?

Objective Task Perf. Measure Display Type: All

1-6 of 6 View All

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

Objective Task Perf. Measure Display Type: All

Back Save Refresh

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

## SFS Handbook: Grantee Processing in SFS

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

Objectives >> Tasks >> Performance Measures ?

Objective Task Perf. Measure Display Type: All

1-6 of 6 View All

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

Objective Task Perf. Measure Display Type: All

Back Save Refresh

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

Event Bid Period Create Bids

Performance Measures ?

Perf. Measure Display Type: All

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

Perf. Measure Display Type: All

Back Save Refresh

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

## SFS Handbook: Grantee Processing in SFS

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

Step	Action
67.	Click the <b>Return to Bid Response</b> link.

**Step 2: Enter Line Bid Responses**

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

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

[Hide Line Detail](#)

★ Bid Required      🗨️ Line Comments/Files

**Lines**

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

[Event Comments and Attachments](#)

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

## SFS Handbook: Grantee Processing in SFS

Step	Action
68.	<b>Note:</b> The amount entered in the <b>Your Unit Bid Price</b> 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 <b>20,000</b> in the <b>Your Unit Bid Price</b> field.
69.	When you are ready to submit your bid response, click the <b>Submit Bid</b> button.

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

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

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

## Respond to Bid Event Capital Budget Types

### Topic Description:

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

### Topic Objectives:

In this topic, you will learn:

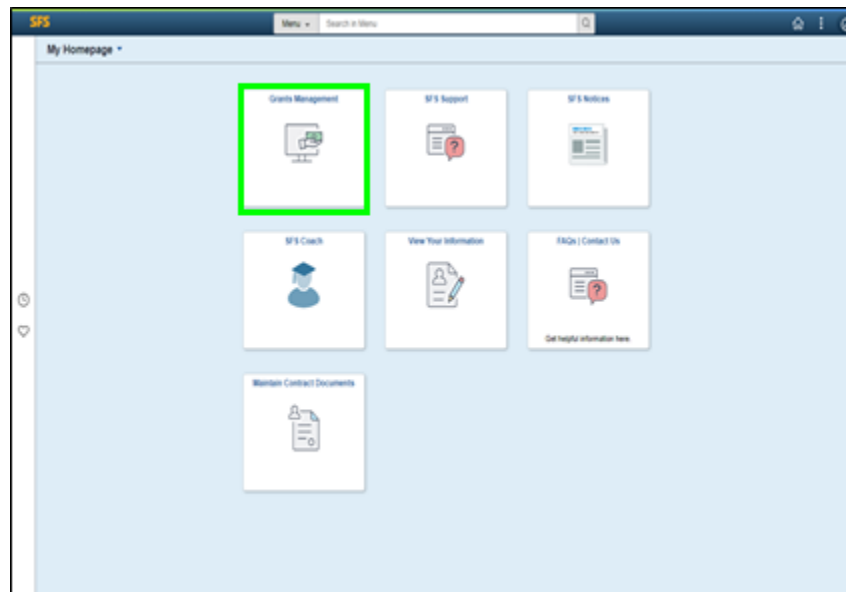
- How to respond to Bid Event Capital Budget Types


### Procedure

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

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

## SFS Handbook: Grantee Processing in SFS



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



Step	Action
2.	Click the <b>Bid Event Search</b> tile.

# SFS Handbook: Grantee Processing in SFS

**Grants Management** **View Events and Place Bids**

Welcome, CHILD CARE SOLUTIONS INC  
User: Child Care Solutions

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

**Search Criteria**

Event ID

Search by Grant Opportunity

Search by Due Date From  To

Search by Status

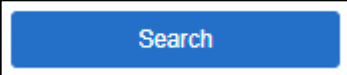
Search by Eligibility

Search by Funding Agency

Search by Service Area

**Search Results**

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

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

**Supplier Search Events** **Event Details**

Welcome, CHILD CARE SOLUTIONS INC  
User: Child Care Solutions

**Event Details**

[Information On Inquiry Options](#)

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

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

Event Description: GRANTS

Contact  
Phone  
Email [test123@sfs.ny.gov](mailto:test123@sfs.ny.gov)  
Online Discussion  
Live Chat Help

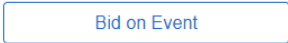
Payment Terms  
My Bids 0  
Edits to Submitted Bids Not Allowed  
Multiple Bids Allowed

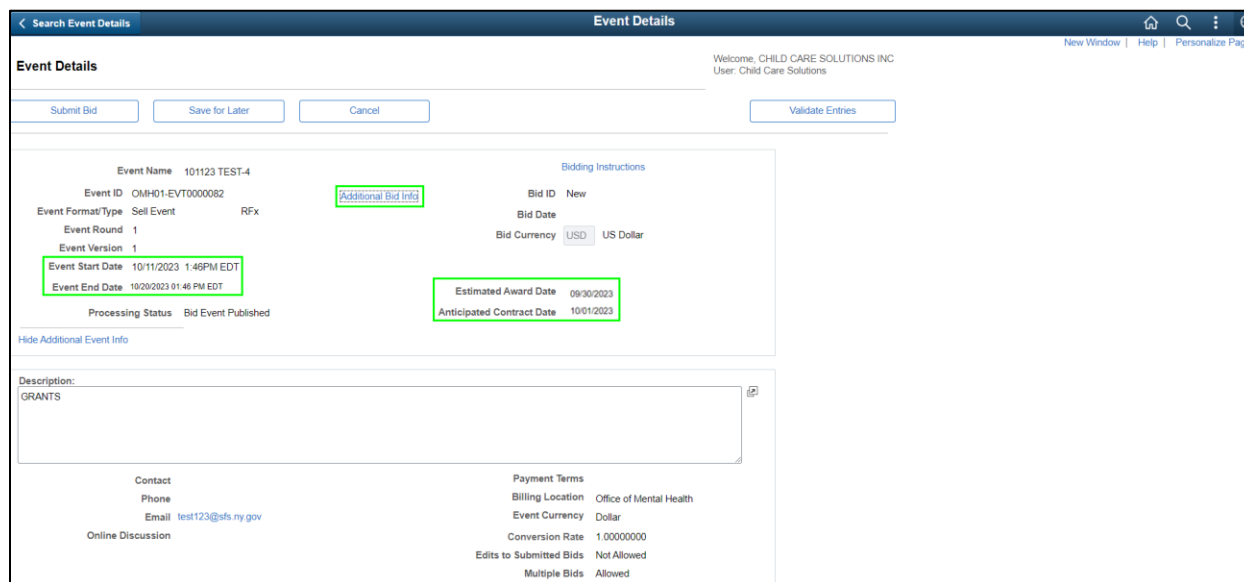
**Lines**

\*Bid Required

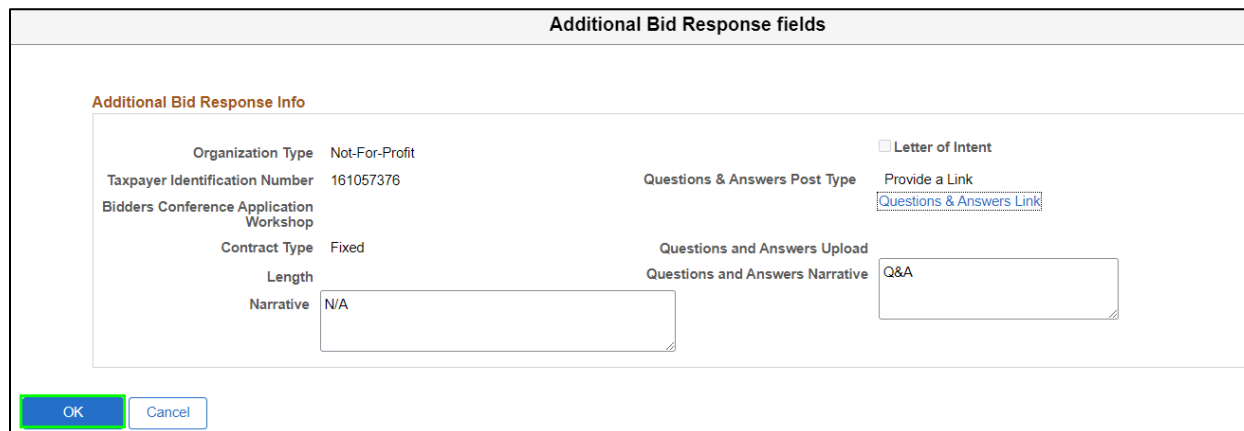


## SFS Handbook: Grantee Processing in SFS

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



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



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

# SFS Handbook: Grantee Processing in SFS

**Step 2: Enter Line Bid Responses**

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

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

[Hide Line Detail](#)

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

**Lines**

Q

1-1 of 1

View All

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

**Event Comments and Attachments**

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

Submit Bid

Save for Later

Validate Entries

[Return to Event Search](#)

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

## SFS Handbook: Grantee Processing in SFS

Event Comments and Attachments

Business Unit OMH01

Event ID EVT0000082

Event Round: 1

Event Version: 1

Attachments

View Event Attachments ?

1-1 of 1

Attached File	Attachment Description	Event RFx Doc	Upload	View
			Upload	View

Add New Attachments ?

1-2 of 2

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

Comments

Add New Comments ?

Please review attached instructions before responding to bid event.

OK

Cancel

Step	Action
11.	Click the <b>OK</b> button after viewing the instructions, attachments, and comments.

Search Event Details

Event Details

Event Name 101123 TEST-4

Event ID OMH01-EVT0000082

Additional Bid Info

Bid ID New

Event Format/Type Sell Event

RFX

Bid Date

Event Round 1

Event Version 1

Bid Currency USD US Dollar

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

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

Estimated Award Date

Processing Status Bid Event Published

Anticipated Contract Date

Hide Additional Event Info

Description: GRANTS

Contact

Phone

Email test123@sfs.ny.gov

Online Discussion

Payment Terms

Billing Location Office of Mental Health

Event Currency Dollar

Conversion Rate 1.00000000

Edits to Submitted Bids Not Allowed

Multiple Bids Allowed

Step 1: Answer General Event Questions

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

General Event Questions 1

Required Questions 1

Questions Responded To 0

DUNS Number

Organization Website

Bidder Contact Information

Name

Telephone

Email

Site/Project Address

User Name Child Care Solutions

## SFS Handbook: Grantee Processing in SFS

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

Bid Response address fields

×

[Help](#)

Site/Project Address

Q

| < <

1 of 1 ▾

> >|

| View All

+

-

Address Line 1

10 Tester Lane

Address Line 2

City

Albany

Postal Code

12222

State

NY

OK

Cancel

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

## SFS Handbook: Grantee Processing in SFS

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

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

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

## SFS Handbook: Grantee Processing in SFS

**Event Details**

Welcome, CHILD CARE SOLUTIONS INC  
User: Child Care Solutions

Message not found

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

Event Name 101123 TEST-4 Bidding Instructions

Event ID OMH01-EVT0000082 Additional Bid Info Bid ID 1

Event Format/Type Sell Event RFX Bid Date

Event Round 1 Bid Currency USD US Dollar

Event Version 1

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

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

Processing Status Bid Event Published

Hide Additional Event Info

Description:  
GRANTS

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

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

Step	Action
20.	Click the <b>Save for Later</b> button.

The bid is not complete. (18058,342)

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

**OK** Cancel

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

# SFS Handbook: Grantee Processing in SFS

How many employees does your organization employ?

Response: 100 Weighting: 100.00000

Best: 0 Worst: 0

**Step 2: Enter Line Bid Responses**

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

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

[Hide Line Detail](#)

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

**Lines**

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

[Event Comments and Attachments](#)

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

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

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

**Create Bids**

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

**Bid Event Periods**

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

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

[Bid Event Line# 1](#)

[Return to Bid Response](#)

Step	Action
23.	Click the <b>Budget properties</b> link.

## SFS Handbook: Grantee Processing in SFS

Event ID

EVT0000082

Max Award Amount

500000.000

Bid Event Period

1

Period From Date

10/01/2023

Bidder/Vendor ID

1000015277

Period To Date

09/30/2024

Budget Type

CAPITAL

Budget Properties

Apply Match

Allowed at Category I

Calculate Match

Grant Fund

Overage %

Budget Category Properties

MP

Q

1-7 of 7

View 5

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

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



## SFS Handbook: Grantee Processing in SFS

**Budget Properties Header**

Narrative

**Period Budget Summary**

☐ ☐

1-7 of 7

[View All](#)

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

**Sub Totals**

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

[Back](#)

[Save](#)

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

## SFS Handbook: Grantee Processing in SFS

x
Category Details

[Help](#)

Budget Type CAPITAL

Budget Category SCOPING & PRE-DEVELOPMENT

Match % Required

Category Details

1-1 of 1

View All

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

Category Totals

Cumulative Grant Funds 0.00

Cumulative Match Funds 0.00

Cumulative Other Funds 0.00

Cumulative Category Details Totals 0.00



Narrative

OK

Cancel

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

## SFS Handbook: Grantee Processing in SFS

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

# SFS Handbook: Grantee Processing in SFS

**Budget Properties Header**

Narrative

**Period Budget Summary**

1-7 of 7 View 5

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

**Sub Totals**

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

Back

Save

Step	Action
41.	Click the <b>Save</b> button.
42.	Click the <b>Back</b> button.

< Bid Search Screen
Create Bids

Business Unit OM/H01  
 Event ID EVT0000082  
 Bidder Setid SHARE

Budget Type CAPITAL  
 Funded Amount 500000.000  
 Period 1 Bidder ID 1000015277

Bid Event Periods

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

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

Bid Event Line# 1

[<Return to Bid Response](#)

Step	Action
43.	Click the <b>Work Plan Properties</b> link.

## SFS Handbook: Grantee Processing in SFS

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

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

# SFS Handbook: Grantee Processing in SFS

Objectives >> Tasks >> Performance Measures ?

Objective Task Perf. Measure Display Type: All

1-5 of 5 View All

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

Objective Task Perf. Measure Display Type: All

Back Save Refresh

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

Objectives >> Tasks >> Performance Measures ?

Objective Task Perf. Measure Display Type: All

1-6 of 6 View All

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

Objective Task Perf. Measure Display Type: All

Back Save Refresh

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

## SFS Handbook: Grantee Processing in SFS

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

Objectives >> Tasks >> Performance Measures ?

Objective Task Perf. Measure Display Type: All

1-6 of 6 View All

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

Objective Task Perf. Measure Display Type: All

Back Save Refresh

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

Event Bid Period Create Bids

Performance Measures ?

Perf. Measure Display Type: All

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

Perf. Measure Display Type: All

Back Save Refresh

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

## SFS Handbook: Grantee Processing in SFS

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

Step	Action
64.	Click the <b>Return to Bid Response</b> link.

**Step 2: Enter Line Bid Responses**

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

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

[Hide Line Detail](#)

★ Bid Required      🗨 Line Comments/Files

**Lines**

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

[Event Comments and Attachments](#)

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



## SFS Handbook: Grantee Processing in SFS

Step	Action
65.	<b>Note:</b> The amount entered in the <b>Your Unit Bid Price</b> 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 <b>20,000</b> in the <b>Your Unit Bid Price</b> field.
66.	When you are ready to submit your bid response, click the <b>Submit Bid</b> button.

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

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

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

## Using the Match Worksheet for a Bid Response

### Topic Description:

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

### Topic Objectives:

In this topic, you will learn:

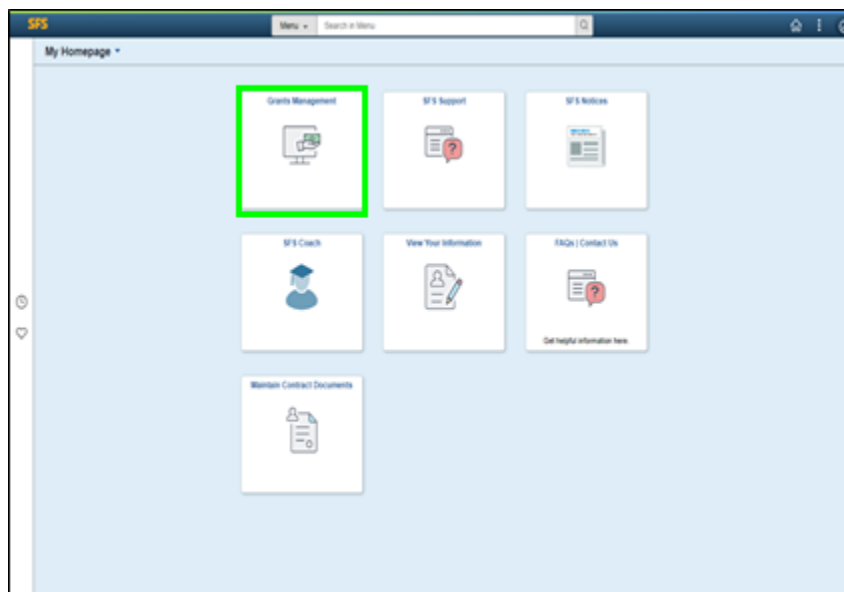
- How to use the Match Worksheet for a Bid Response


### Procedure

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

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

## SFS Handbook: Grantee Processing in SFS



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



Step	Action
2.	Click the <b>Bid Event Search</b> tile.

# SFS Handbook: Grantee Processing in SFS

Grants Management

View Events and Place Bids

View Events and Place Bids

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

Welcome, CHILD CARE SOLUTIONS INC

User: Child Care Solutions

Search Criteria

Event ID

Search by Grant Opportunity

Search by Due Date

From

To

Search by Status

Search by Eligibility

Search by Funding Agency

Search by Service Area

Search

Clear Criteria

Search Results

1 of 1

1-1 of 1

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

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

# SFS Handbook: Grantee Processing in SFS

**Supplier Search Events** **Event Details**

Welcome, CHILD CARE SOLUTIONS INC  
User: Child Care Solutions

**Event Details**

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

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

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

Event Description: GRANTS

Contact: [test123@sfs.ny.gov](mailto:test123@sfs.ny.gov)  
Phone:   
Email: [test123@sfs.ny.gov](mailto:test123@sfs.ny.gov)  
Online Discussion:   
Live Chat Help:   
Payment Terms: **1 In-Process**  
My Bids: **1 In-Process**  
Edits to Submitted Bids: Not Allowed  
Multiple Bids: Allowed

★ Bid Required    Ⓞ Line Comments/Files

**Lines**

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

**Search Event Details** **View, Edit or copy from Saved Bids**

Welcome, CHILD CARE SOLUTIONS INC  
User: Child Care Solutions

**View, Edit or copy from Saved Bids**

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

**Bids**

1-1 of 1

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

[Return to Event Search](#)

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

# SFS Handbook: Grantee Processing in SFS

How many employees does your organization employ?

Response: 100 Weighting: 100.00000

Best: 0 Worst: 0

**Step 2: Enter Line Bid Responses**

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

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

[Hide Line Detail](#)

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

**Lines**

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

[Event Comments and Attachments](#)

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

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

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

**Create Bids**

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

**Bid Event Periods**

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

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

[Bid Event Line# 1](#)

[<Return to Bid Response](#)

Step	Action
9.	Click the <b>Budget Properties</b> link.

## SFS Handbook: Grantee Processing in SFS

Budget Properties Header x

[Help](#)

Event ID EVT0000082

Bid Event Period 1

Bidder/Vendor ID 1000015277

Max Award Amount 500000.000

Period From Date 10/01/2023

Period To Date 09/30/2024

Budget Type EXPENDITURE

**Budget Properties**

Apply Match Allowed at Category 1 ⌵

Calculate Match Grant Fund ⌵

☐ Include Match Worksheet Match Worksheet

**Budget Category Properties**

⌵ Q
1-5 of 10 ⌵
[View All](#)

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

Step	Action
10.	Click the <b>Match Worksheet</b> link.

Include Match Worksheet x

[Help](#)

**Include Match Worksheet**

⌵ Q
1-1 of 1 ⌵
[View All](#)

	Source of Matching Funds	Describe Match source	Form of Documentation Required	Match Total		
1	<div style="border: 2px solid green; width: 150px; height: 20px;"></div>	<div style="border: 2px solid green; width: 100px; height: 20px; position: relative;"> <span style="position: absolute; top: -10px; left: 50%; transform: translateX(-50%);">⌵</span> </div>	<div style="border: 2px solid green; width: 200px; height: 20px;"></div>	<div style="border: 2px solid green; width: 80px; height: 20px;"></div>	<div style="border: 1px solid black; padding: 2px;">+</div>	<div style="border: 1px solid black; padding: 2px;">-</div>

Match Worksheet Detail Total 0.00

Budget Detail Match Total 0.00

Narrative

OK

Cancel

Step	Action
11.	Enter applicable value in the <b>Source of Match Funds</b> field.

## SFS Handbook: Grantee Processing in SFS

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

## Reviewing and Approving Grant Contracts

### Lesson Description:

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

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

### Lesson Objectives:

In this lesson, you will learn how to:

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

## Preview a Contract Agreement

### Topic Description:

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

# SFS Handbook: Grantee Processing in SFS

## Topic Objectives:

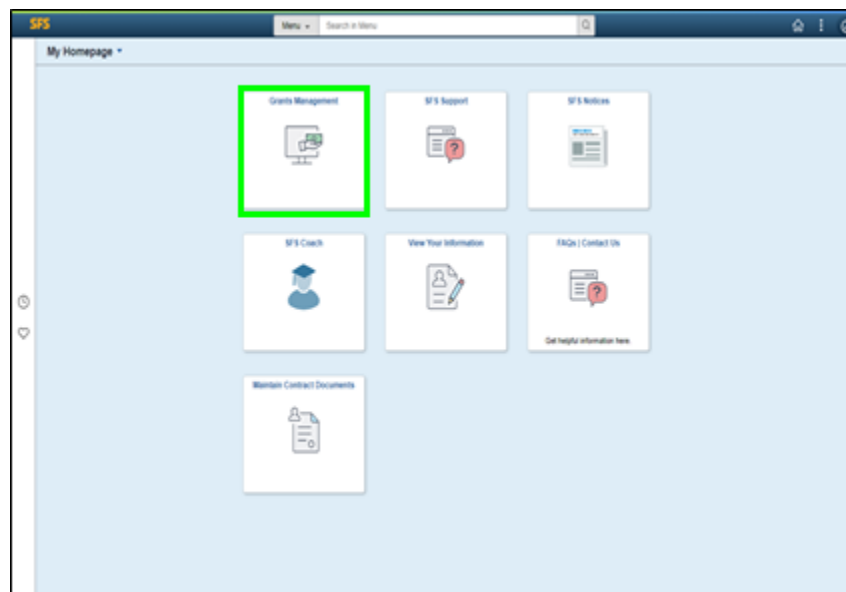
In this topic, you will learn:

- How to review a Contract Agreement

## Procedure

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

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



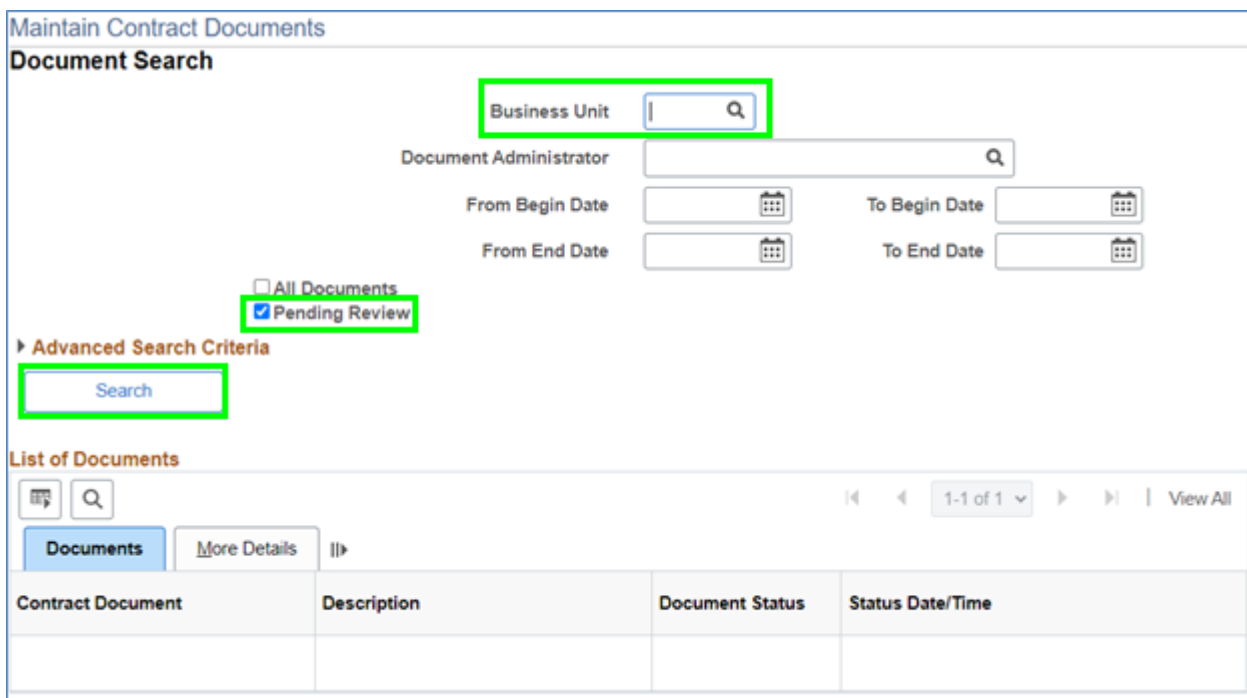
Step	Action
1.	<p><b>Preferred Navigation:</b> Click the <b>Grant Management</b> tile.</p> <p><b>Alternative Navigation:</b> From the <b>NavBar</b> navigate to: Menu &gt; Manage Contracts &gt; Maintain Contract Documents</p> <p><b>Note:</b> You must log in to the SFS Vendor Portal to view a grant contract.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




## SFS Handbook: Grantee Processing in SFS




Step	Action
2.	Click the <b>Grant Contracts Search</b> tile.




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


## SFS Handbook: Grantee Processing in SFS



Step	Action
5.	Click the <b>Search</b> button. 



Maintain Contract Documents

**Document Search**

Business Unit  

Document Administrator  







From Begin Date   To Begin Date  


From End Date   To End Date  

☐ All Documents  
☒ Pending Review

► **Advanced Search Criteria**

**List of Documents**

  1-10 of 12     | [View All](#)



Contract Document <sup>△</sup>	Description	Document Status	Status Date/Time
<span style="border: 2px solid green;">000000000000000000000000105387</span>	OMH01-C12345GM-1040200	Pending Review	

Step	Action
6.	Click the applicable <b>Contract ID</b> from the search results.

## SFS Handbook: Grantee Processing in SFS

Find Documents

Documents

Begin Date

12/09/2022

Expire Date

12/08/2025

Document Status

Pending Review

Owner

Information Available for Review

Q

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

Comments History

Comments

Approve

Deny

Pushback

View Document

No Attachments/Related Documents Exist

Send E-Mail

View Executed Documents

Previous in List


Next in List

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

## SFS Handbook: Grantee Processing in SFS

**STATE OF NEW YORK MASTER CONTRACT FOR GRANTS FACE PAGE**

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

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

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

### Topic Description:

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

### Topic Objectives:

# SFS Handbook: Grantee Processing in SFS

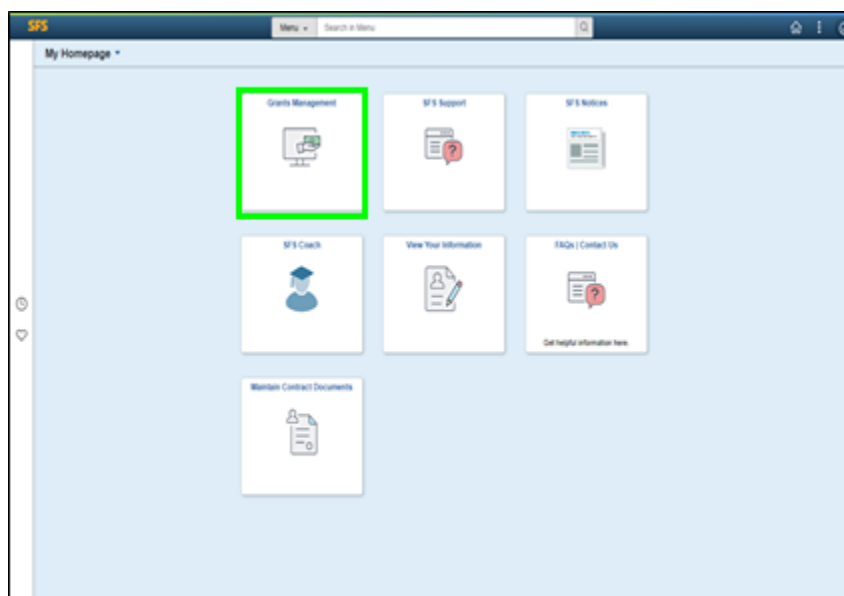
In this topic, you will learn:

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

## Procedure

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

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

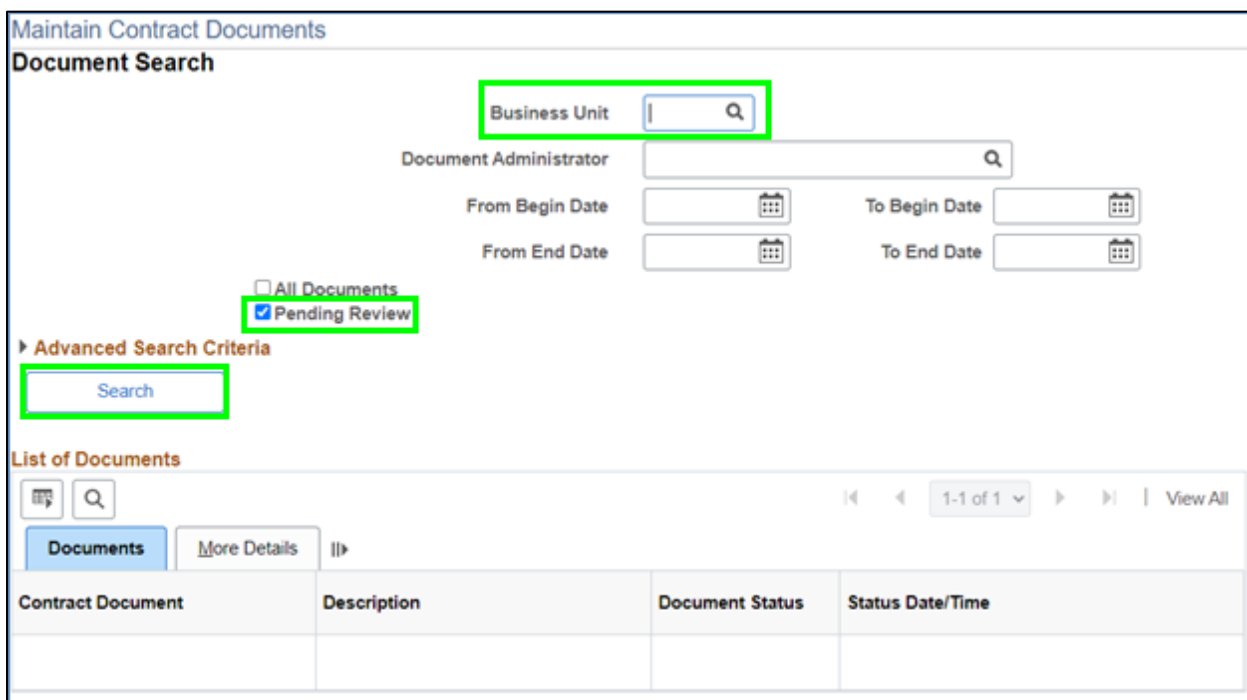



Step	Action
1.	<p><b>Preferred Navigation:</b> Click the <b>Grant Management</b> tile.</p> <p><b>Alternative Navigation:</b> From the <b>NavBar</b> navigate to: Menu &gt; Manage Contracts &gt; Maintain Contract Documents</p> <p><b>Note:</b> You must log in to the SFS Vendor Portal to update grant contract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

## SFS Handbook: Grantee Processing in SFS



Step	Action
2.	Click the <b>Grant Contracts Search</b> tile.



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

## SFS Handbook: Grantee Processing in SFS

[illegible]

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

Contract ID

00000000000000000118077

Description

OMH01-00180GM-1010215

Document Administrator

DOE, JOHN

Approval Start Date

08/28/2023 9:01AM

Begin Date

08/18/2023

Expire Date

07/07/2024

Document Status

Pending Review

Owner

Information Available for Review

1-1 of 1

	Period Start Date	Period End Date	Period Amount	Budget Detail Period	Budget Detail Status	Budget Detail Review Date	Budget Period Mark as Reviewed	Work Plan Period	Workplan Detail Status	Work Plan Review Date	Workplan Period Mark as Reviewed
1	08/18/2023	07/07/2024	3,000.000	Period 1	In Process		<input type="checkbox"/>	Period 1	New		<input type="checkbox"/>

Comments History

Comments

Approve

Deny

Pushback

View Document

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

## SFS Handbook: Grantee Processing in SFS

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

The screenshot shows a web browser window with multiple tabs. The active tab is titled 'AGREEMENT\_00'. The page displays the 'STATE OF NEW YORK MASTER CONTRACT FOR GRANTS FACE PAGE' form. The form is structured as follows:

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

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



## SFS Handbook: Grantee Processing in SFS

<b>Contract ID</b>		00000000000000000118077	
<b>Description</b>		CM&D-01180OM-1010215	
<b>Document Administrator</b>		DOE, JOHN	
<b>Approval Start Date</b>		06/28/2023 9:01AM	
<b>Begin Date</b>		06/18/2023	
<b>Expire Date</b>		07/07/2024	
<b>Document Status</b>		Pending Review	
		Owner	

**Information Available for Review ⓘ**

1 of 1 ▾ ▶▶

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

**Comments History ⓘ**

Comments

Approve    
  Deny    
  Pushback

View Document

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

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

## SFS Handbook: Grantee Processing in SFS

Contract Period Budget

☒ Available for Supplier Updates ?

Contract SetID: SHARE  
Contract ID: 000000000000000000000000118077  
Version #: 1  
  
Budget Type: EXPENDITURE

Copy from Contract Period

Contract Period: 1  
Period From Date: 08/18/2023  
Period To Date: 07/07/2024  
Period Amount 3,000.00

Budget Properties

Apply Match: Allowed at Category Level ?

Calculate Match: ?

☐ Include Match Worksheet

☐ Allow Supplier to Add Deliverable/Outcome Rows ?

☐ Use Match

Match % 0.00

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

## SFS Handbook: Grantee Processing in SFS

▼ Period Budget Summary

1-10 of 10 View 5

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

Total Match Funds Calculated
0.00

Total Grant Funds Requested
0.00

Total Match Funds
0.00

Total Other Funds
0.00

Grand Total
0.00

OK
Cancel
Apply











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

## SFS Handbook: Grantee Processing in SFS

[illegible]

Step	Action
13.	In this example, we are updating budget category detail information for the <b>Fringe</b> budget category and <b>Expenditure</b> budget type.
14.	<p>Make the applicable updates to the budget category detail information.</p> <p>In this example, we are increasing the <b>Grant Funds</b> amount for the <b>Fringe</b> budget category, so the total grant funds requested for all the budget categories equals the period amount.</p>
15.	<p>The <b>Narrative</b> field should be used to provide additional details about the information entered for a specific budget category.</p> <p>In this example, we will enter <b>Increased the grant funds amount so total grant funds requested equals the period amount</b> in the <b>Narrative</b> field.</p>
16.	<p><b>Note:</b></p> <ul style="list-style-type: none"> <li>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.</li> <li>The <b>Total Funds</b> will automatically calculate based on the sum of the <b>Grant Funds</b>, <b>Match Funds</b>, and <b>Other Funds</b>.</li> </ul>
17.	When you are finished entering the <b>Budget Category Detail</b> information, click the <b>OK</b> button.

## SFS Handbook: Grantee Processing in SFS

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

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

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

## SFS Handbook: Grantee Processing in SFS

Contract ID

0000000000000000000000118077

Description

CN&H-01-00180GM-1010215

Document Administrator

DOE, JOHN

Approval Start Date

06/28/2023 9:01AM

Begin Date

06/18/2023

Expire Date

07/07/2024

Document Status

Pending Review

Owner

<

Information Available for Review ⓘ

>

1 of 1

<

>

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

Comments History ⓘ

Comments

Approve

Deny

Pushback

View Document

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

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

### Grants Work Plan

Contract Work Plan

Work Plan Header

Available for Supplier Updates:

☐

Contract ID: 00000000000000000000118077  
Contract Period: 1  

Allow Supplier Defined Objective & Tasks:

☐

maximum number of:

Objectives: 50Tasks: 100Performance Measures: 300

Supplier:

SetID: SHARE Contract Version: 1  
From: 08/18/2023 To: 07/07/2024

Online Work Plan Required: ☒

Work Plan ID: 00000000000000000000118013-SHAREV1P1  

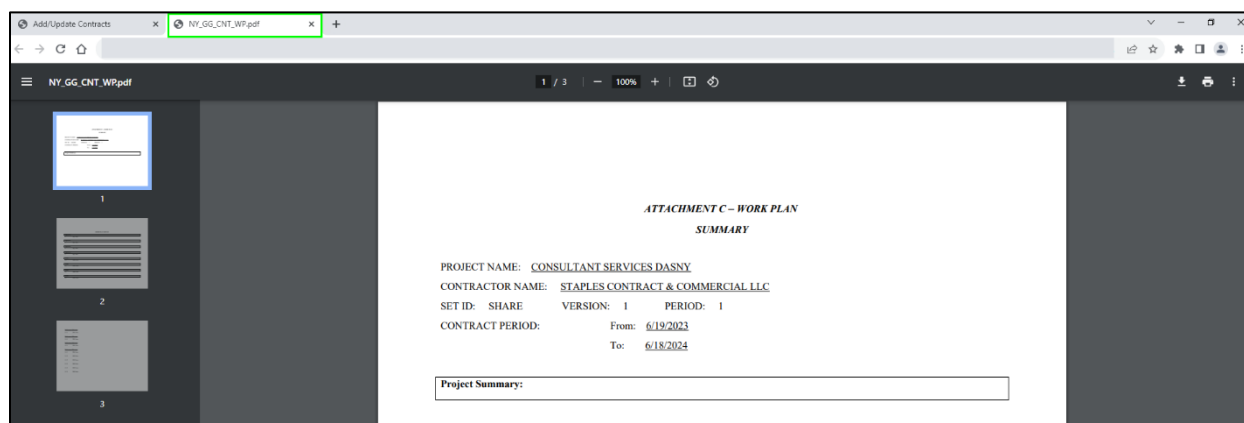
[Work Plan Overview](#)  
[Work Plan Overview Report](#)

Project Summary ?

ParagraphA<sup>B</sup>A<sup>I</sup>A<sup>S</sup>BBIUOL=::-GridImage

## SFS Handbook: Grantee Processing in SFS

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



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

# SFS Handbook: Grantee Processing in SFS

Objectives >> Tasks >> Performance Measures ?

Objective Task Perf. Measure Display Type: All

Basic Info More Details

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

Objective Task Perf. Measure Display Type: All

OK Cancel Apply Refresh

Step	Action
25.	Click the <b>More Details</b> tab.

Objectives >> Tasks >> Performance Measures ?

Objective Task Perf. Measure Display Type: All

Basic Info More Details

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

Objective Task Perf. Measure Display Type: All

OK Cancel Apply Refresh

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



## SFS Handbook: Grantee Processing in SFS

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

Information Available for Review ⓘ

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

Comments History

Comments

Approve Deny Pushback

View Document

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

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

Mark as Reviewed checked (30001,1114)

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

Yes No

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

## SFS Handbook: Grantee Processing in SFS

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

### Apply an Electronic Signature to a Contract Agreement

#### Topic Description:

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

#### Topic Objectives:

In this topic, you will learn how to:

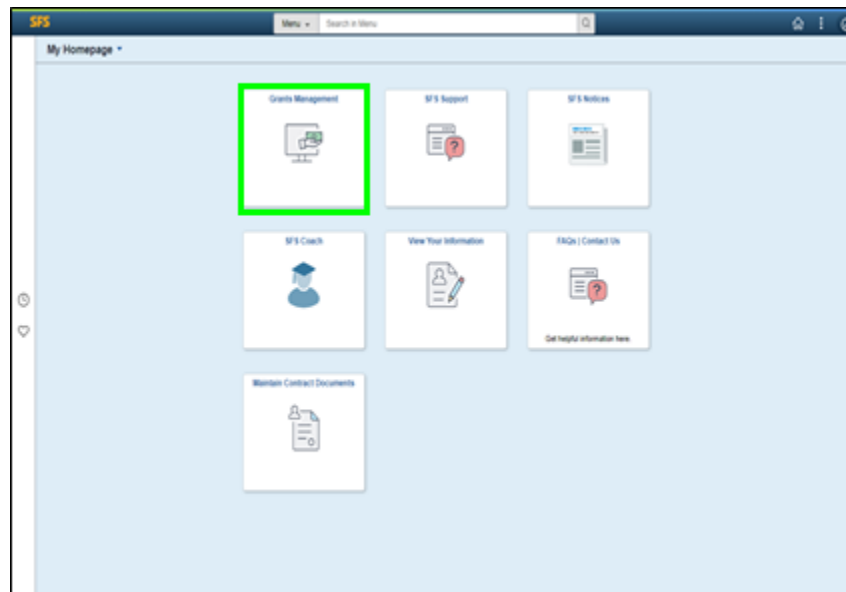
- Approve a Contract
- Apply an Electronic Signature to a Contract Agreement

#### Procedure

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

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

## SFS Handbook: Grantee Processing in SFS



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





Step	Action
2.	Click the <b>Grant Contracts Search</b> tile.



## SFS Handbook: Grantee Processing in SFS



Maintain Contract Documents

**Document Search**

Business Unit  

Document Administrator  





From Begin Date   To Begin Date  


From End Date   To End Date  

☐ All Documents  
☒ Pending Review



Advanced Search Criteria

List of Documents

  1-1 of 1   View All



Contract Document	Description	Document Status	Status Date/Time

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

## SFS Handbook: Grantee Processing in SFS

Maintain Contract Documents

Document Search

Business Unit

OMH01

Document Administrator

From Begin Date

To Begin Date

From End Date

To End Date

☒ All Documents

☐ Pending Review

Advanced Search Criteria

Search

List of Documents

Grid View

Search

<<

<

11-20 of 32

>

>>

Documents

More Details

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

Step	Action
6.	Click the applicable <b>Contract ID</b> from the search results.

< Find Documents

Documents

Contract Number

OMH01-C00109GM-3650732

Contract ID

00000000000000000000117721

Description

OMH01-C00109GM-3650732

Document Administrator

DOE\_JOHN

Approval Start Date

02/15/2023 3:43PM

Begin Date

02/15/2023

Expire Date

02/15/2025

Document Status

Pending Approval

Owner

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

Approve

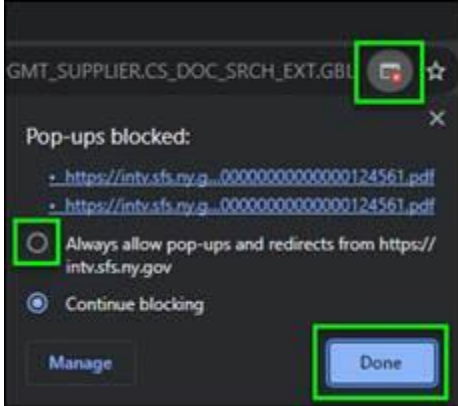
Deny

View Approvals

View Contract Agreement

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

## SFS Handbook: Grantee Processing in SFS


Step	Action
7.	<p>Click the <b>View Contract Agreement</b> button to view the Contract Agreement in a new browser window.</p> <p><a href="#">View Contract Agreement</a></p>
8.	<p><b>Note:</b> 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 <b>Done</b> button. Following this, click the <b>View Contract Agreement</b> button again to view the new browser window.</p> 

## SFS Handbook: Grantee Processing in SFS

SFS Intranet - H: x SFS Intranet - H: x SFS Intranet - H: x Documents x AGREEMENT\_00 x + -

STATE OF NEW YORK MASTER CONTRACT FOR GRANTS FACE PAGE

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

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

## SFS Handbook: Grantee Processing in SFS

< Find Documents

Documents

Home

Search

Alerts

More

Contract Number

OMH01-C00109GM-3650732

Contract ID

00000000000000000000117721

Description

OMH01-C00109GM-3650732

Document Administrator

DOE\_JOHN

Approval Start Date

02/15/2023 3:43PM

Begin Date

02/15/2023

Expire Date

02/15/2025

Document Status

Pending Approval

Owner

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


Approve

Deny

View Approvals

View Contract Agreement

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

Step	Action
10.	Click the <b>Approve</b> button. 



## SFS Handbook: Grantee Processing in SFS

< Find Documents

Documents

Contract Number

OMH01-C00109GM-3650732

Contract ID

00000000000000000000117721

Description

OMH01-C00109GM-3650732

Document Administrator

DOE,JOHN

Approval Start Date

02/15/2023 3:43PM

Begin Date

02/15/2023

Expire Date

02/15/2025

Document Status

Pending Approval

Owner

By clicking the 'Approve' button, I, acting in the capacity as Contractor, certify that I am the signing authority, or have been delegated or designated formally as the signing authority by the appropriate authority or official, and as such I do agree, and I have the authority to agree, to all of the terms and conditions set forth in the Master Contract, including all appendices and attachments. I understand that (i) payment of a claim on this Master Contract is conditioned upon the Contractor's compliance with the terms and conditions of the contract, and (ii) by electronically signing this agreement, the Contractor is required to register its signature and registration is current, all applicable laws and regulations are followed, and (b) all data and responses submitted through this system shall remain the property of the State of Maryland and shall be used for the purposes assigned User ID and Password and that I am responsible for any activity conducted through this system. If my signature has not been entered and provided, my signature is inadmissible in court.

Comments History

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

Comments

Contract Agreement Approved by Vendor.

Approve

Deny

View Approvals

View Contract Agreement

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

Title

Please enter your title as it should be displayed within the signed agreement (e.g., Deputy Director).

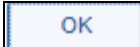
Title

Deputy Director

OK

Cancel

Help

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

## SFS Handbook: Grantee Processing in SFS

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

Step	Action
13.	Click the <b>View Contract Agreement</b> button.

The screenshot shows the 'View Contract Agreement' document. It contains the same legal disclaimer as the previous screenshot. Below the disclaimer, the contractor is identified as 'CONTRACTOR: STAPLES CONTRACT & COMMERCIAL, LLC'. The 'By:' field is filled with 'John Doe', and the 'Title:' field is filled with 'Deputy Director'. The 'Date:' field is filled with '05/23/2023'. At the bottom, there are sections for 'ATTORNEY GENERAL'S SIGNATURE APPROVED AS TO FORM' and 'STATE COMPTROLLER'S SIGNATURE', each with 'By:' and 'Title:' fields.


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

## SFS Handbook: Grantee Processing in SFS

SFS Intranet - Home | Documents | AGREEMENT\_00000000000000000000

AGREEMENT\_00000000000000000000117... 3 / 30

<p>is conditioned upon the Contractor's compliance with all applicable conditions of participation in this program and ( if I am acting in the capacity as a not-for profit Contractor) the accuracy and completeness of information submitted to the State of New York through the Gateway vendor prequalification process and (ii) by electronically Master Contract, I certify that (a) to the extent that the Contractor is required to register and/or file reports with the Office of the Attorney General's Charities Bureau ("Charities Bureau"), the Contractor's registration is current, all applicable reports have been filed, and the Contractor has no outstanding requests from the Charities Bureau relating to its filings and (b) all data and response in the application submitted by the Contractor are true, complete and accurate. I also understand that use of my assigned User ID and Password on the State's contract management system is equivalent to having placed my signature on the Master Contract and that I am responsible for any activity attributable to the user of my User ID and Password. Additionally, any information entered will be considered to have been entered and provided at my direction. I further certify and agree that the Contractor agrees to waive any claim that this electronic record or signature is inadmissible in court, notwithstanding the choice of law provisions.</p> <p><b>CONTRACTOR: STAPLES CONTRACT &amp; COMMERCIAL LLC</b></p> <p>By: John Doe Printed Name</p> <p>Title: Deputy Director</p> <p>Date: 05/23/2023</p>	<p>By: _____ Printed Name</p> <p>Title: _____</p> <p>Date: _____</p>
<p><b>ATTORNEY GENERAL'S SIGNATURE</b> <b>APPROVED AS TO FORM</b></p> <p>By: _____</p>	<p><b>STATE COMPTROLLER'S SIGNATURE</b></p> <p>By: _____</p>

Step	Action
15.	Click the <b>Close (X)</b> button. 

## SFS Handbook: Grantee Processing in SFS

[Document](#)

# Documents

[New Window](#) | [Help](#) | [Permissions Page](#)

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Maintain Contract Documents

## Document Management

[Return to Document Search](#)

Contract Number	OMH1-C0019GMA-3656732
Contract ID	00000000000000000000117721
Description	OMH1-C0019GMA-3656732
Document Administrator	DOE_JONW
Approval Start Date	02/15/2023 3:43PM
Begin Date	02/15/2023
Expire Date	02/15/2025
Document Status	Pending Approval
Owner	

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

### Comments History

(STAPLES 2023-05-23-15 36 51 000000) Contract Agreement Approved By Vendor	

No Attachments/Related Documents Found  
Send Email  
View Executed Documents

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

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

### Topic Description:

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

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

### Topic Objectives:

In this topic, you will learn:

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

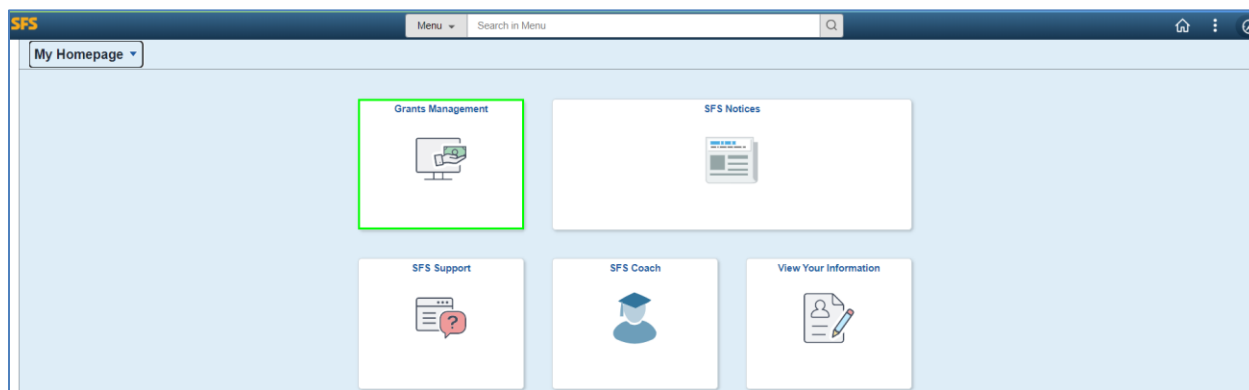
## Procedure

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

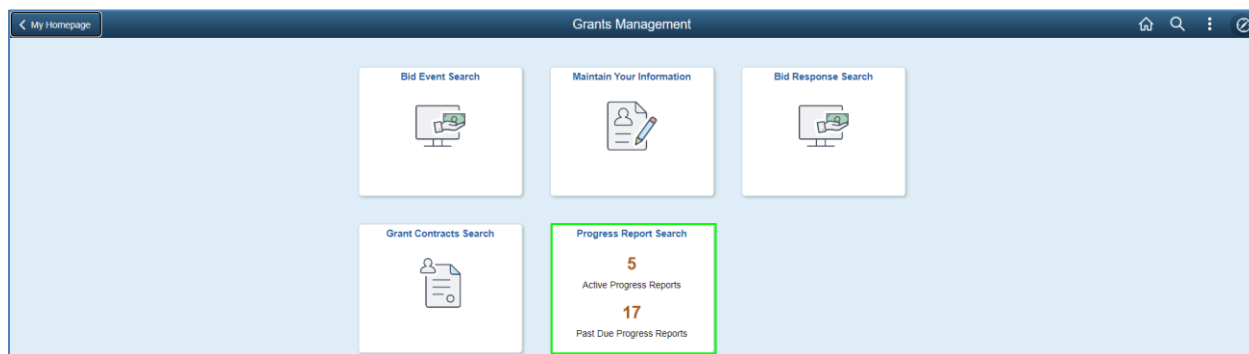
## SFS Handbook: Grantee Processing in SFS

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

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

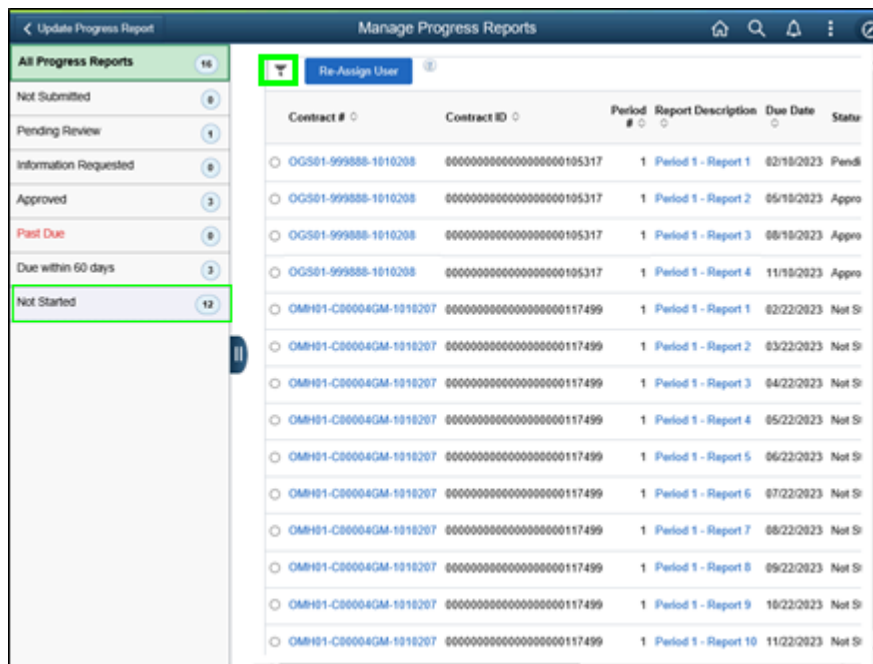



Step	Action
1.	<p><b>Preferred Navigation:</b> Click the <b>Grant Management</b> tile.</p> <p><b>Alternative Navigation:</b> From the <b>NavBar</b> navigate to: Menu &gt; Manage Contracts &gt; Manage Progress Reports</p> <p><b>Note:</b> You must log in to the SFS Vendor Portal to submit a progress report.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



Step	Action
2.	Click the <b>Progress Report Search</b> tile.

## SFS Handbook: Grantee Processing in SFS



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

## SFS Handbook: Grantee Processing in SFS

Cancel

Filter

Done

Contract #

Contract ID

Period #

Report ID

Report Description

Status

Due Date From

Due Date To

Business Unit

Project Name

User Assigned

Supplier ID

Supplier Name

Clear

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

## SFS Handbook: Grantee Processing in SFS

[illegible]

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



## SFS Handbook: Grantee Processing in SFS

Update Progress Report		Manage Progress Reports					
All Progress Reports	16	<div> <div>Re-Assign User</div> </div>					
Not Submitted	0						
Pending Review	1						
Information Requested	0						
Approved	3						
Past Due	0						
Due within 60 days	3						
Not Started	12						

Step	Action
9.	Select the applicable <b>Report Description link</b> to update and submit the progress report. <div> <a href="#">Period 1 - Report</a> </div>

[Manage Progress Reports](#)

## Update Progress Report

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

contract #

OMH01-C00004GM-1010207

Report ID

Period 1 - Report 1

[View Associated Work Products](#)

Period #

1

Report Period From

01/21/2023

Agency Name

Office of Mental Health

Report Period To

02/29/2023

Status

Not Started

Due Date

02/02/2023

### Performance Measures

1 of 1

Objective Number	Objective Name	Task Number	Task Name	Performance Measure Number	Performance Measure Name	Response Type	Comment (Target/Goal)
1	test objective	1.1	test task	1.1.1	test performance measure	Text/Comment	<a href="#">View Text/Comment</a>

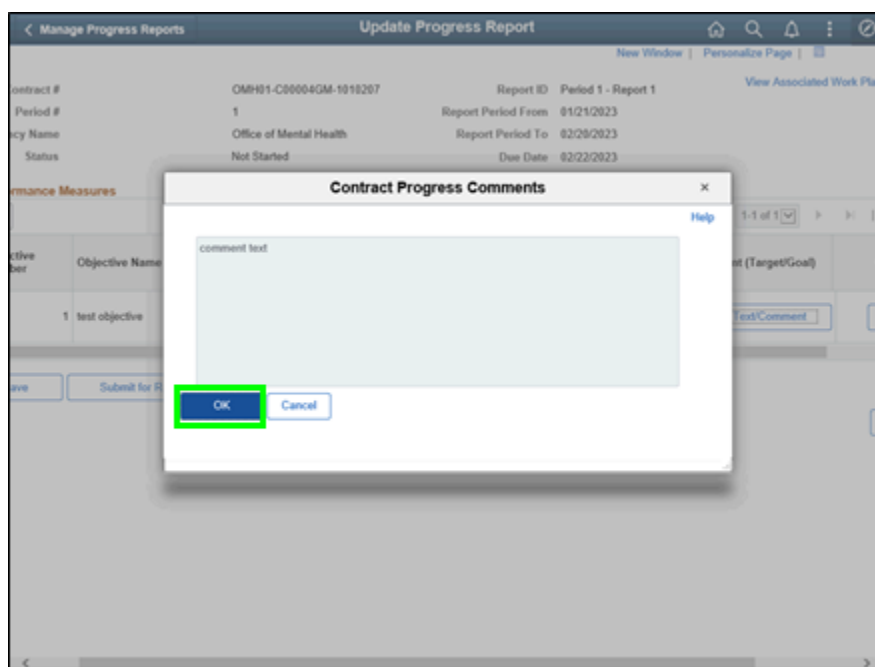
Save

Submit for Review

Cancel

## SFS Handbook: Grantee Processing in SFS

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



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

## SFS Handbook: Grantee Processing in SFS

**Update Progress Report**

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

1      Report Period From    01/21/2023

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

Not Started      Due Date    02/22/2023

1-1 of 1 | View All

Task Name	Performance Measure Number	Performance Measure Name	Response Type	Comment (Target/Goal)	Comment Response
test task	1.1.1	test performance measure	Text/Comment	<a href="#">View Text/Comment</a>	<a href="#">Enter Text/Comment</a>

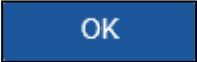
[or Review](#)    [Cancel](#)    [Return](#)

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

**Contract Progress Comments**

OK    Cancel

## SFS Handbook: Grantee Processing in SFS

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

Manage Progress Reports
Update Progress Report

New Window | Personalize Page

Contract #
Period #
Agency Name
Status

OMH01-C00004GM-1010207
1
Office of Mental Health
Not Started

Report ID
Report Period From
Report Period To
Due Date

Period 1 - Report 1
01/21/2023
02/20/2023
02/22/2023

View Associated

Performance Measures



1-1 of 1

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

Save

Submit for Review

Cancel

Step	Action
16.	Click the <b>Save</b> button. 
17.	Click the <b>Submit for Review</b> button. 

## SFS Handbook: Grantee Processing in SFS

**Update Progress Report**

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

Period # 1 Report Period From 01/21/2023

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

Status Not Submitted Due Date 02/22/2023

**Performance Measures**

Objective Name Task Number Target (Target/Goal) Comment

test objective 1.1

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

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

Yes No

Save Submit for Review

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

## Update and Re-submit a Returned Progress Report

### Topic Description:

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

### Topic Objectives:

In this topic, you will learn:

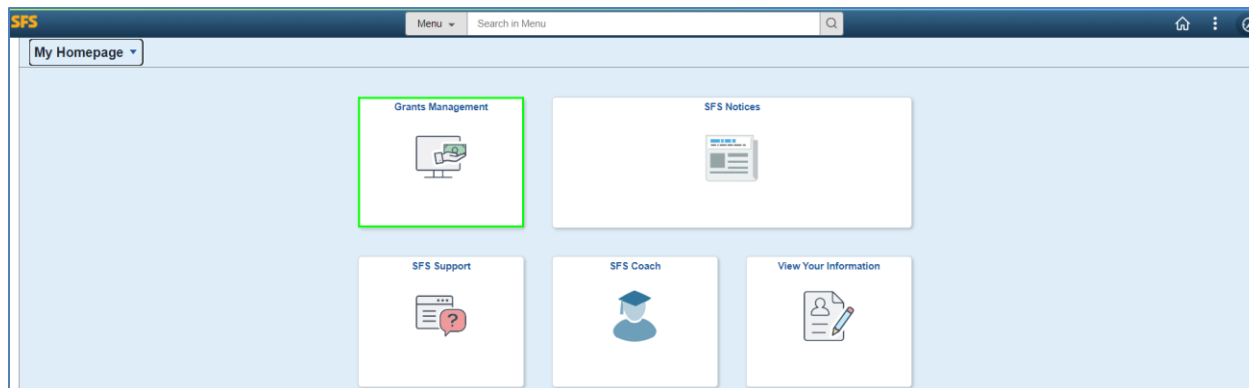
- How to update and re-submit a returned progress report.

### Procedure

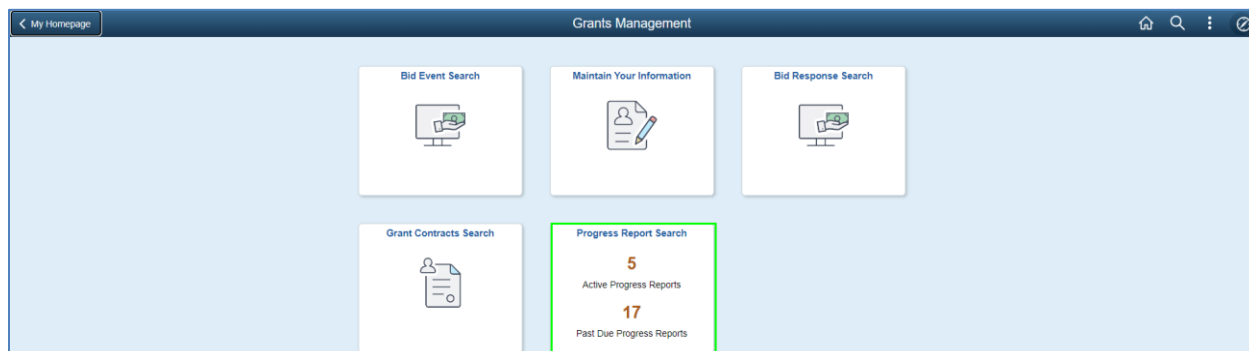
**Scenario:** You previously submitted a progress report to the agency for review and the agency has returned the progress report to you requesting additional information. You will update and re-submit a progress report that was returned by the agency requesting additional information.

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

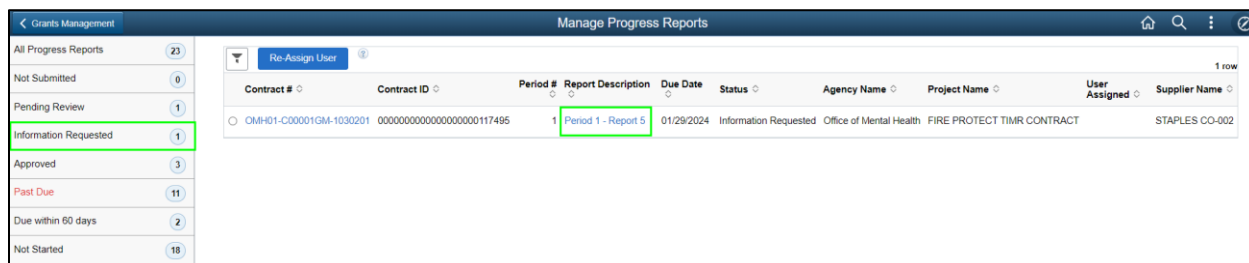
## SFS Handbook: Grantee Processing in SFS



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



Step	Action
2.	Click the <b>Progress Report Search</b> tile.



## SFS Handbook: Grantee Processing in SFS

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

[Manage Progress Reports](#)

Update Progress Report

Contract # OMH01-C00001GM-1030201  
Period # 1  
Agency Name Office of Mental Health  
Status Information Requested

Report ID Period 1 - Report 5  
Report Period From 10/20/2023  
Report Period To 01/19/2024  
Due Date 01/29/2024

[View Associated Work Plan](#)  
[View Approvals](#)

Performance Measures

1-1 of 1

View All

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

Send Comment to Agency

Save

Resubmit for Review

Cancel

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

## SFS Handbook: Grantee Processing in SFS

X

[Help](#)

### Contract Prog Report Approval

Contract Progress Report Status: Pending
[View/Hide Comments](#)

Contract Report Approval Path

**On Hold**

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

**Information Request**

Information Request

**Not Routed**

Multiple Approvers  
Cntrct Report Approver 2

**Comments**

Please re-enter integer response 08/27/23 - 8:12 PM

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

Contract # OMH01-C00001GM-1030201

Period # 1

Agency Name Office of Mental Health

Status Information Requested

Report ID Period 1 - Report 5

Report Period From 10/20/2023

Report Period To 01/19/2024

Due Date 01/29/2024

[View Associated Work Plan](#)

[View Approvals](#)

**Performance Measures**

1-1 of 1

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

**Send Comment to Agency**

Updated integer response

Save
Resubmit for Review
Cancel

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



## SFS Handbook: Grantee Processing in SFS

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

**Performance Measures**

Objective Number	Objective Name	Task Number	Task Name	Performance Measure Number	Performance Measure Name	Response Type	Integer (Target/Goal)	Integer Response
1	perf measure 1 name	1.1.1	perf measure 1 name	1.1.1	perf measure 1 name	Numeric	500	<input type="text" value="450"/>

Send Comment to Agency  
Updated integer response

Step	Action
10.	Click the <b>Resubmit for Review</b> button.

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

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

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

## Entering and Maintaining Grant Claims

### Lesson Description:

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

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

## SFS Handbook: Grantee Processing in SFS

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

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

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

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

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

### **Lesson Objectives:**

In this lesson, you will learn how to:

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

## **Enter a New Claim – Advance/Initial Amount**

### **Topic Description:**

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

### **Topic Objective:**

In this topic, you will learn:

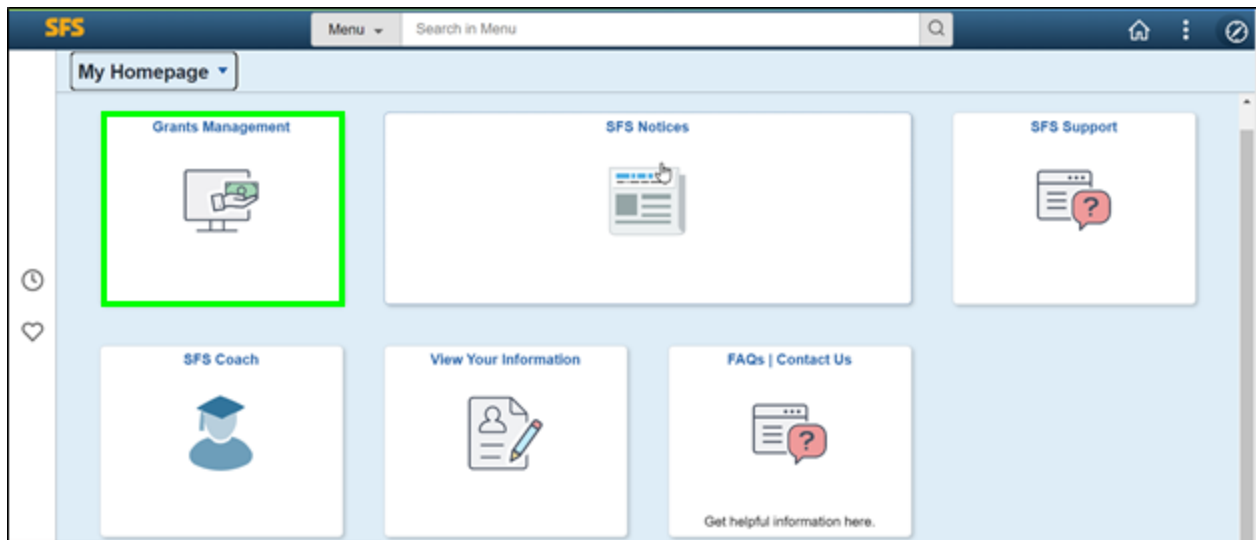
- How to submit a claim for an advance/initial payment

### **Procedure:**

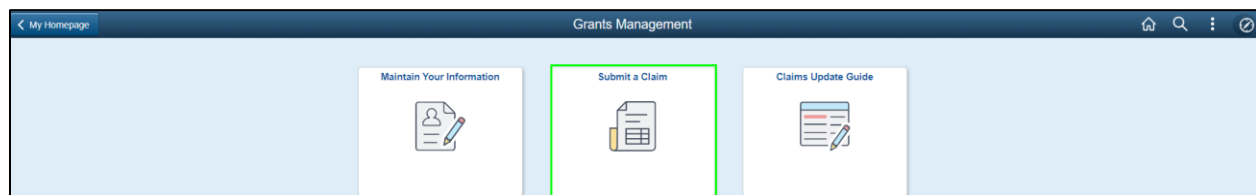
**Scenario:** You want to submit an advance/initial payment claim on an approved grant contract with remaining funds available.

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

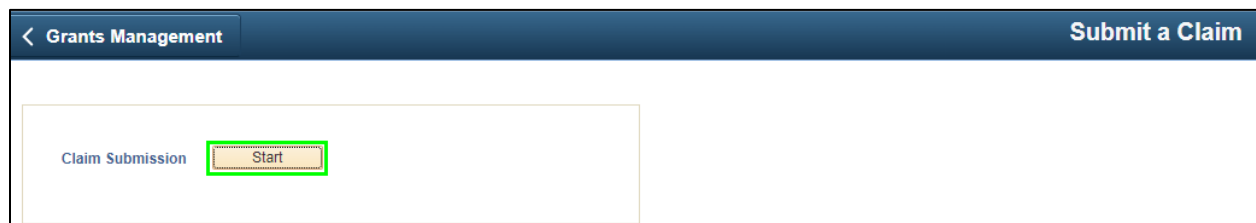
## SFS Handbook: Grantee Processing in SFS



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



Step	Action
2.	Click the <b>Submit a Claim</b> tile.



Step	Action
3.	Click on the Claim Submission <b>Start</b> button.

## SFS Handbook: Grantee Processing in SFS

**Claim Entry and Submission**

Business Unit: OMH01 Claim Number: NEXT

**Contract Selection** Complete

**Claim Header** Not Started

**Claim Lines** Not Started

**Claim Line Details** Not Started

**Claim Summary** Not Started

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

Select the contract for the claim that is being entered

Select	Contract ID	Description	NYS Contract#	Begin Date	Expire Date	Agency Name	Contract Total
<input type="checkbox"/>	000000000000000000000000117523	MULTI-PLATE RETHERM	C00014GM	01/24/2023	01/25/2024	OMH01	10,000.00
<input type="checkbox"/>	000000000000000000000000117815	MULTI-PLATE RETHERM	C00014GM	01/24/2023	01/25/2024	OMH01	10,000.00
<input type="checkbox"/>	000000000000000000000000117819	MULTI-PLATE RETHERM	C00014GM	02/01/2023	01/25/2024	OMH01	10,000.00
<input type="checkbox"/>	000000000000000000000000117706	MULTI-PLATE RETHERM	C00014GM	02/08/2023	02/08/2025	OMH01	10,000.00
<input checked="" type="checkbox"/>	000000000000000000000000117744	ENERGY EFFICIENCY REHAB	C00121GM	02/29/2023	02/19/2024	OMH01	10,000.00

Next >

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

**Claim Entry and Submission**

Business Unit: OMH01 Claim Number: NEXT

**Contract Selection** Complete

**Claim Header** Visited

**Claim Lines** Not Started

**Claim Line Details** Not Started

**Claim Summary** Not Started

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

Contract ID: 000000000000000000000000117744  
Description: OMH01-C00121GM-1000204  
Project Name: 000000000012111

Supplier ID: 1000016490  
Supplier Name: PEOPLES EQUAL ACTION AND COMMUNITY  
Supplier Location: MAINEPAY (B) BBA PEACE INC 217 S SALINA ST 2ND FL SYRACUSE NY 13202

Contract Begin Date: 02/29/2023  
Contract Expire Date: 02/19/2024  
Contract Max Amount: 10,000.00  
Invoice ID: Test12367  
Claim Initiated Date: 10/23/2023

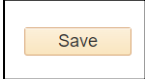

Claim Status: New  
Claim Date: 10/23/2023 (B)  
Claim Type: Regular

Header Attachments

Save

Step	Action
7.	Verify contract details on the <b>Claim Header</b> page.
8.	<p><b>Vendor Location</b> values can be selected using the <b>Supplier Location</b> magnifying glass icon if needed.</p> <p><b>Note:</b> Vendor Location is a default set of rules, or attributes, that define how an agency conducts business with a particular grantee. A vendor location comprises information such as payment terms, payment options, pay to bank accounts, etc. Although a vendor location is not an address, it does reference addresses.</p>
9.	<p><b>Note:</b> Change the <b>Claim Date</b> using the calendar icon if needed. Claim date defaults to the current date.</p>

## SFS Handbook: Grantee Processing in SFS

Step	Action
10.	Enter a unique <b>Invoice ID</b> up to 30 characters in the <b>Invoice ID</b> field.
11.	Click the <b>Save</b> button. 
12.	Click the <b>Next</b> button on the top right corner of the page. 

X Exit

Claim Entry and Submission

< Previous

Next >

Contract Selection

Complete

Select the Contract Period and Claim Line Type

Claim Header

Complete

Contract Lines

Complete

Claim Line Details

Not Started

Claim Summary

Not Started

Business Unit: OMH01

Claim Number: 000000458

X

Contract ID: 000000000000000000000000117744

Description: OMH01-C00121GM-1000204

Project Name: 000000000012111

Contract Begin Date: 02/20/2023

Contract Expire Date: 02/19/2024

Contract Max Amount: 10,000.00

Invoice ID: Test12367

Claim Initiated Date: 10/23/2023

Supplier ID: 1000016490

Supplier Name: PEOPLES EQUAL ACTION AND COMMUNITY

Supplier Location: MAINEPAY DBA PEACE INC

Claim Status: In Process

Claim Date: 10/23/2023

Claim Type: Regular

217 S SALINA ST  
2ND FL  
SYRACUSE NY 13202


Personalize | Find | View All | [Print Icon] First 1 of 1 Last

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

Save

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

## SFS Handbook: Grantee Processing in SFS

Business Unit: <b>OMH01</b>		Claim Number: <b>000000458</b>			
Contract ID: 000000000000000000117744		Supplier ID: 1000016490			
Description: OMH01-C00121GM-1000204		Supplier Name: PEOPLES EQUAL ACTION AND COMMUNITY			
Project Name: 000000000012111		Supplier Location: MAINEPAY		DBA PEACE INC	
Contract Begin Date: 02/20/2023		SYRACUSE		217 S SALINA ST 2ND FL	
Contract Expire Date: 02/19/2024		Claim Status: In Process			
Contract Max Amount: 10,000.00		Claim Date: 10/23/2023			
Invoice ID: Test12367		Claim Type: Regular			
Claim Initiated Date: 10/23/2023					

Claim Line Details

Find | View All

First 1 of 1 Last

Claim Line#: 1

Contract Period: 1

Period Date From: 02/20/2023

Period Date To: 02/19/2024

Line Type: Initial

Line Comments

Line Attachments

Initial Request Details

Period Total 10,000.00

Initial Percentage 10.00

Initial Amount Calculated 1,000.00

Initial Amount Requested

Initial Request Justification

Save

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

Claim Line Comments

×

[Help](#)

Business Unit

OMH01

Claim Number

000000458

Line Number

1

Find | View All

First

◀

1 of 1

▶

Last

+

-

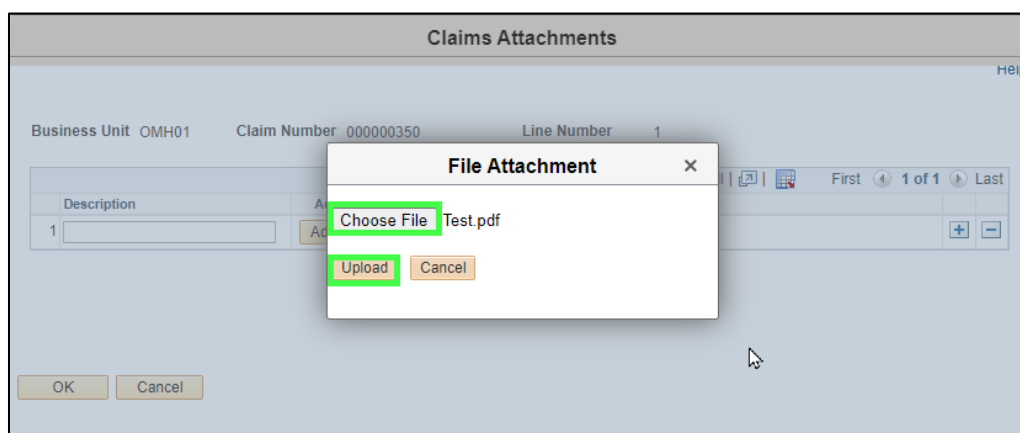
Comment

OK

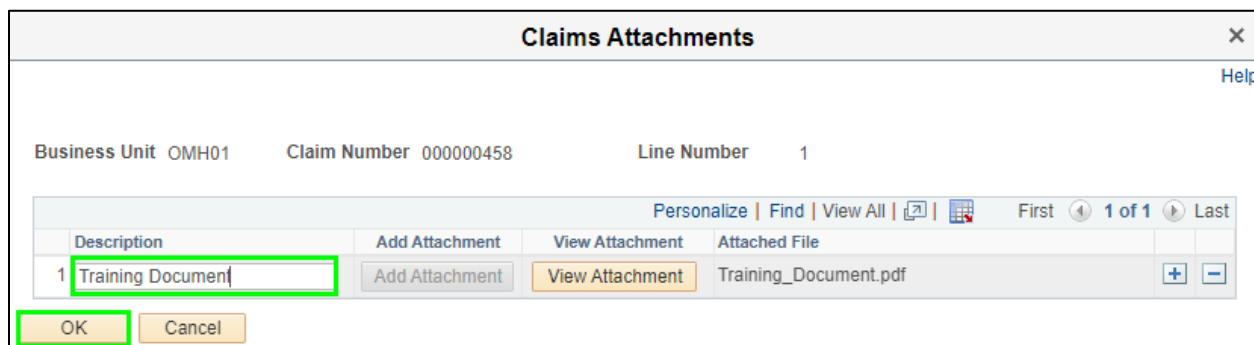
Cancel

## SFS Handbook: Grantee Processing in SFS

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



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



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

## SFS Handbook: Grantee Processing in SFS

X Exit

Claim Entry and Submission

< PreviousNext >

New Window | Help | Personalize Page

Contract Selection  
Complete

Claim Header  
Complete

Claim Lines  
Complete

Claim Line Details  
Complete

Claim Summary  
Not Started

Business Unit: CMH01    Claim Number: 000000458 ✖

Supplier ID: 1000016490  
Description: CMH01-C00121GM-1000204  
Project Name: 00000000012111  
Contract Begin Date: 02/20/2023  
Contract Expire Date: 02/19/2024  
Contract Max Amount: 10,000.00  
Invoice ID: Test12367  
Claim Initiated Date: 10/23/2023

Supplier Name: PEOPLES EQUAL ACTION AND COMMUNITY  
Supplier Location: MAINEPRY DBA PEACE INC 217 S SALINA ST ZND FL  
Claim Status: In Process  
Claim Date: 10/23/2023  
Claim Type: Regular

Claim Line DetailsFind | View AllFirst ⏪ 1 of 1⏩ Last

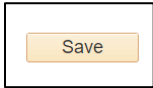
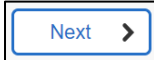
Claim Line#: 1      Contract Period: 1      Period Date From: 02/20/2023      Period Date To: 02/19/2024  
Line Type: InitialLine Comments  
Line Attachments



Initial Request Details

Period Total10,000.00  
Initial Percentage10.00  
Initial Amount Calculated1,000.00  
Initial Amount Requested100.00



Initial Request Justification  
Initial Request

Save



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

Claim Line Summary				Personalize   Find   View All    		First 1 of 1 Last	
Line Number	Contract Period	Period From Date	Period To Date	Line Type	Amount Requested		
1	1	02/05/2023	02/04/2024	Initial	10.00		

Claim Line Comments Summary				Personalize   Find   View All    		First 1 of 1 Last	
Line Number	Comment	Comment Entered By	Comment Entered On				

Claim Line Attachment Summary				Personalize   Find   View All    		First 1 of 1 Last	
Line Number	File Name	Description	Uploaded by User	View Attachment			
				View Attachment			

☒ Claim Entry Complete

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

Signatory Name \_\_\_\_\_ Date 09/18/2023



## SFS Handbook: Grantee Processing in SFS

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

### Enter a New Claim - Reimbursement Amount

#### Topic Description:

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

#### Topic Objective:

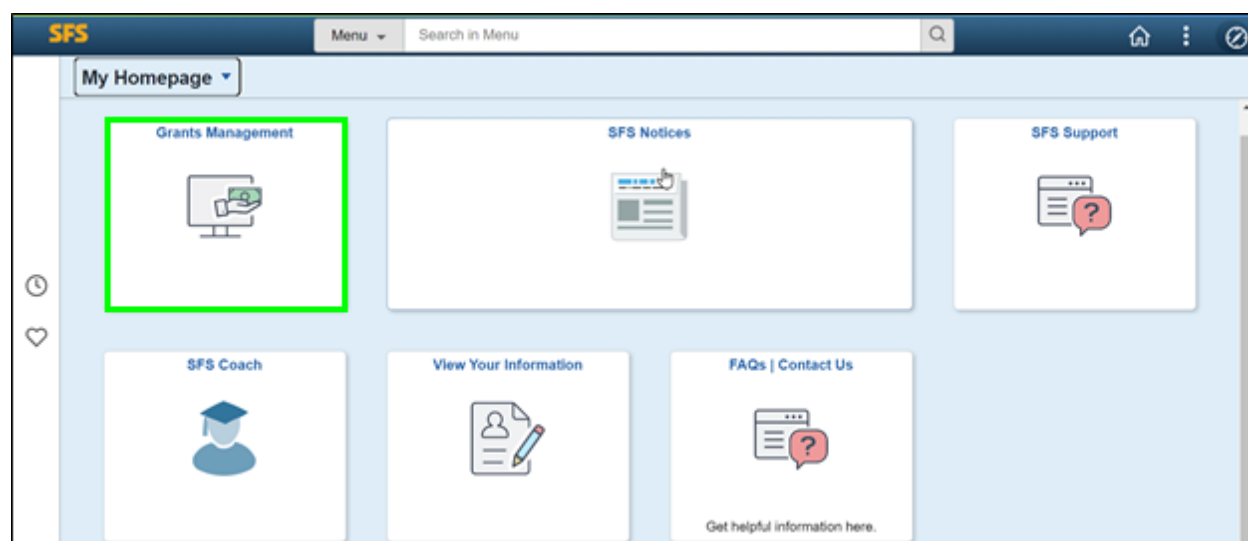
In this topic, you will learn:

- How to submit a claim for a reimbursement payment

#### Procedure:

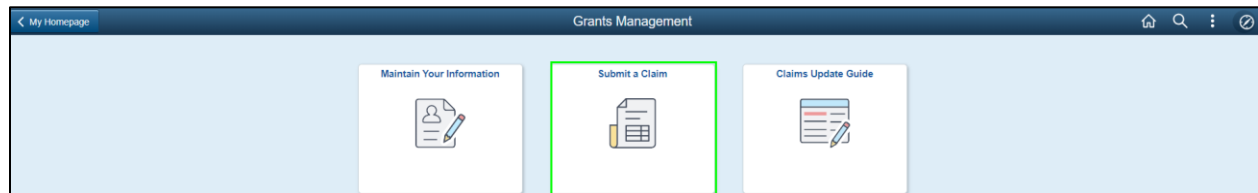
**Scenario:** You want to submit a reimbursement payment claim on an approved grant contract with remaining funds available.

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

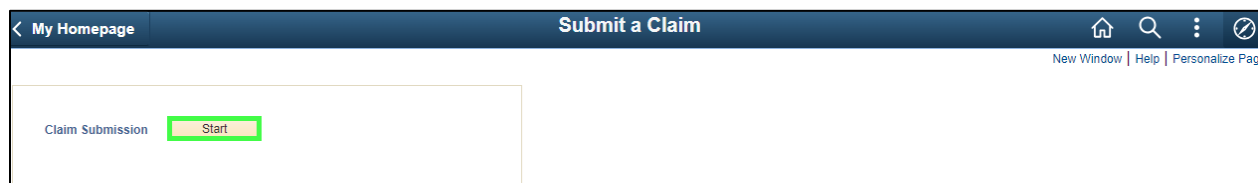


## SFS Handbook: Grantee Processing in SFS

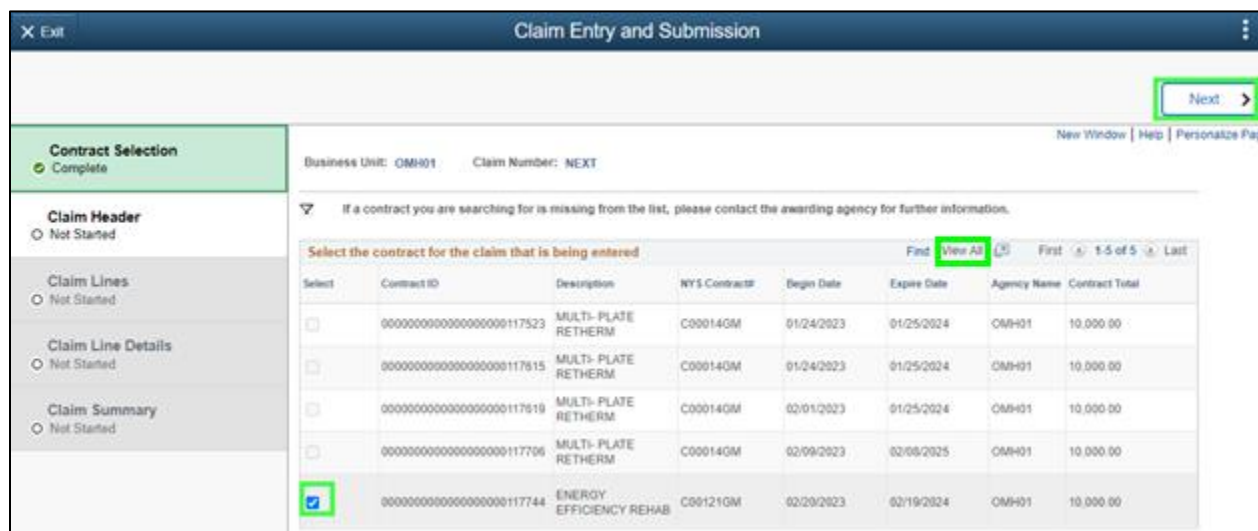
Step	Action
1.	<p><b>Navigation:</b> Click the <b>Grants Management</b> tile.</p> <p><b>Alternative Navigation:</b> From the <b>NavBar</b> navigate to: Menu &gt; eSettlements &gt; Submit a Claim.</p> <p><b>Note:</b> You must log in to the SFS Vendor Portal to enter a claim.</p>



Step	Action
2.	Click the <b>Submit a Claim</b> tile.



Step	Action
3.	Click the <b>Start</b> button.



## SFS Handbook: Grantee Processing in SFS

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

✕ Exit

Claim Entry and Submission

⋮

← Previous

New Window | Help | Personalize Page

Contract Selection

● Complete

Claim Header

● Visited

Claim Lines

○ Not Started

Claim Line Details

○ Not Started

Claim Summary

○ Not Started

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

Business Unit: OMH01

Claim Number: NEXT

Contract ID: 00000000000000000117744

Supplier ID: 1000016490

Description: OMH01-C00121GM-1000204

Supplier Name: PEOPLES EQUAL ACTION AND COMMUNITY

Project Name: 0000000000012111

Supplier Location: MAINEPAY DBA PEACE INC 217 S SALINA ST

Contract Begin Date: 02/20/2023

Contract Status: New

Contract Expire Date: 02/19/2024

Claim Date: 09/08/2023

Contract Max Amount: 10 000.00

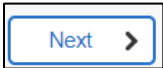
Claim Type: Regular

Invoice ID: A123B456Z

Claim Initiated Date: 09/08/2023

Header Attachments

Save

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

## SFS Handbook: Grantee Processing in SFS

Contract Selection

Complete

Claim Header

Complete

Claim Lines

Visited

Claim Line Details

Not Started

Claim Summary

Not Started

Select the Contract Period and Claim Line Type

Business Unit: OMH01

Claim Number: 000000350

Contract ID: 0000000000000000000017744

Supplier ID: 1000016490

Description: OMH01-C00121GM-1000204

Supplier Name: PEOPLES EQUAL ACTION AND COMMUNITY

Project Name: 0000000000012111

Supplier Location: MAINEPAY DBA PEACE INC SYRACUSE NY 13202

Contract Begin Date: 02/20/2023

Claim Status: In Process

Contract Expire Date: 02/19/2024

Claim Date: 09/08/2023

Contract Max Amount: 10,000.00

Claim Type: Regular

Invoice ID: A123B456Z

Claim Initiated Date: 09/08/2023

Line Number

1

\*Contract Period

02/20/2023

Period From Date

02/20/2023

Period To Date

02/19/2024

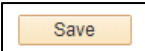
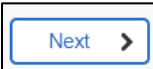
Period Amount

10,000.00

\*Line Type

Initial Reimbursement

Save

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

## SFS Handbook: Grantee Processing in SFS

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

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

Line Type: Reimbursement Vendor: 1000015490 - OMH01-C00121GM-1000204

NYS Contract ID: C00121GM - Hdr Bid 2-20

Line Comments  
Line Attachments

**Reimbursement Claim Details**

Budget Type CAPITAL

Cost Incurred Date From  Cost Incurred Date To

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

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

Save

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

## SFS Handbook: Grantee Processing in SFS

Claim Line Details

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

Business Unit OMH01 Claim Number 000000350 Line Number 1

Comment add comments

OK Cancel

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

Claims Attachments

Business Unit OMH01 Claim Number 000000350 Line Number 1

Description 1

File Attachment

Choose File Test.pdf

Upload Cancel

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

## SFS Handbook: Grantee Processing in SFS

**Claims Attachments** × [Help](#)

Business Unit OMH01    Claim Number 00000350    Line Number 1

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

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

**OK** **Cancel**

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

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

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

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

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

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

**Reimbursement Claim Details**

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

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

**Save**

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

## SFS Handbook: Grantee Processing in SFS

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

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



## SFS Handbook: Grantee Processing in SFS

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

### Update an Existing Claim

#### Topic Description:

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

#### Topic Objective:

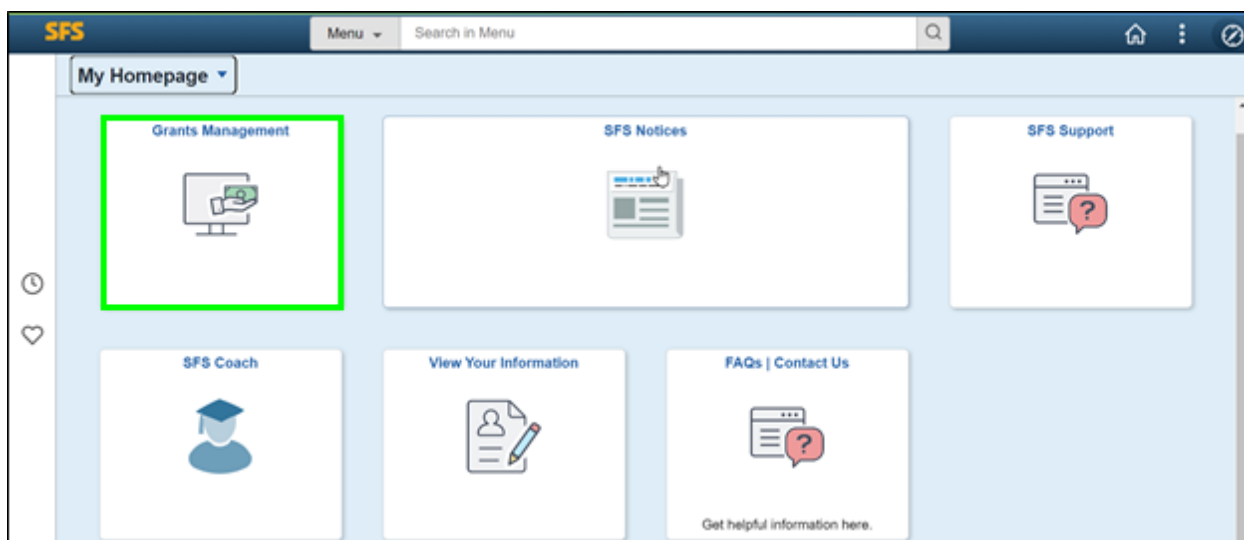
In this topic, you will learn:

- How to update and submit a saved claim

#### Procedure:

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

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



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

## SFS Handbook: Grantee Processing in SFS

[My Homepage](#)

Grants Management

Bid Event Search

Maintain Your Information

Prequalification Application

Bid Response Search

Grant Contracts Search

Progress Report Search

1

Active Progress Reports

26

Past Due Progress Reports

Submit a Claim

Claims Update Guide

Step	Action
2.	Click the <b>Claims Update Guide</b> tile.

Grants Management

Claims Update Guide

New Window | Help | Personalize Page

Manage Claims

Search Criteria

SetID

Business Unit

Supplier ID

Supplier Name

Claim Number

Claim Date

Claim Status

Contract ID

NYS Contract #

Invoice ID

Invoice Date

Search

Clear

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

[illegible]

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

# SFS Handbook: Grantee Processing in SFS

Contract Selection  
Complete

Claim Header  
Complete

Claim Lines  
Complete

Claim Line Details  
Visited

Claim Summary  
Not Started

Business Unit: OMH01    Claim Number: 000000460

Contract ID: 000000000000000000117744    Supplier ID: 1000016490  
Description: OMH01-C00121GM-1000204    Supplier Name: PEOPLES EQUAL ACTION AND COMMUNITY  
Project Name: 000000000012111    Supplier Location: MAINEPAY    DBA PEACE INC    217 S SALINA ST  
Contract Begin Date: 02/20/2023    SYRACUSE    NY 13202  
Contract Expire Date: 02/19/2024    Claim Status: In Process  
Contract Max Amount: 10,000.00    Claim Date: 10/23/2023  
Invoice ID: test02876    Claim Type: Regular  
Claim Initiated Date: 10/23/2023

Claim Line Details

Find | View All    First 1 of 1 Last

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

Reimbursement Claim Details

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

Reimbursement Funds

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

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

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

Page 181

## SFS Handbook: Grantee Processing in SFS

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

## Update a Returned Claim

### Topic Description:

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

# SFS Handbook: Grantee Processing in SFS

## Topic Objective:

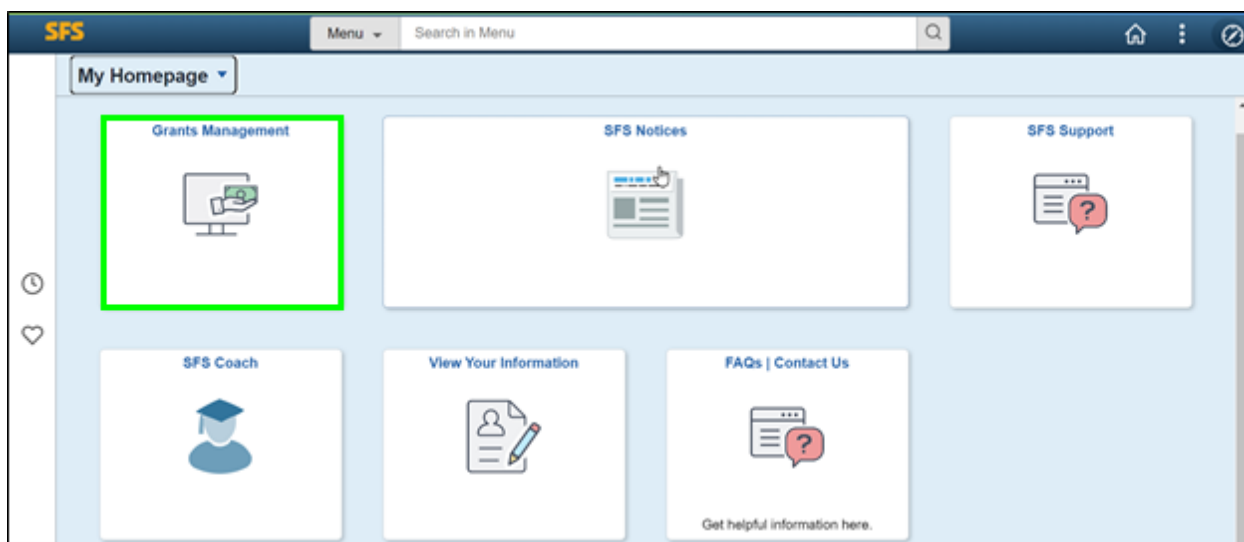
In this topic, you will learn:

- How to update and resubmit a returned claim

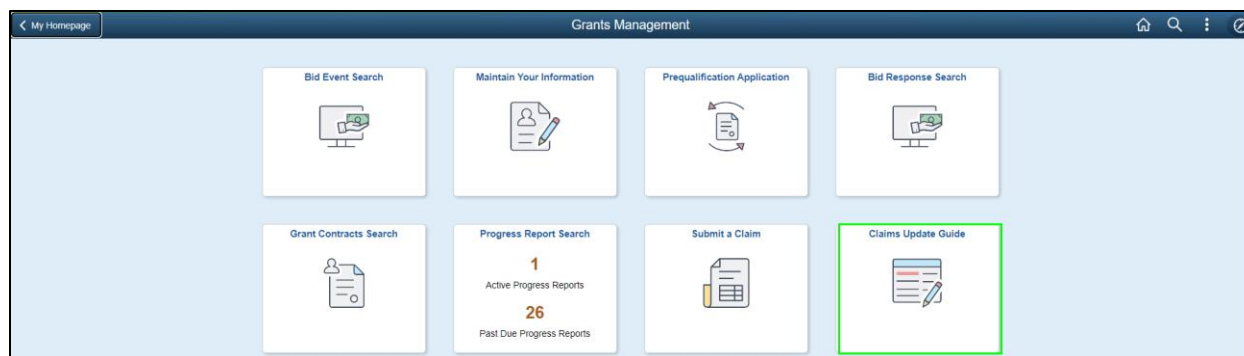
## Procedure:

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

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



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



## SFS Handbook: Grantee Processing in SFS

Step	Action
2.	Click the <b>Claims Update Guide</b> tile.

Claims Update Guide

Grants Management

Manage Claims

Search Criteria

SetID

SHARE

Business Unit

OMH01

Supplier ID

Supplier Name

Claim Number

Claim Date

BY

Claim Status

Returned

Contract ID

NYS Contract #

Invoice ID

Invoice Date

BY

Search

Clear

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

Manage Claims									
<a href="#">Previous</a> <a href="#">Next</a>									
<a href="#">New Window</a>   <a href="#">Help</a>   <a href="#">Personalize Page</a>									
<b>All Claims (2)</b>									
● Viewed	Select claim to be updated								
<b>In Progress (2)</b>									
○ Not Started									
<b>Returned (2)</b>									
● Viewed									
<b>Completed (2)</b>									
○ Not Started									

Claim Number	Invoice Number	Claim Status	Contract ID	Project Name	Business Unit	Claim Date	Class Entered By User	Claim Last Updated By	Claims Total Amount
<a href="#">0000000006</a>	SAR-CLT_78L_26G2	Returned	00000000000000000000000017718A	ENABLER EFFICIENCY RE+HB	Cash@H	10/04/2023	Agency_Person_A	Cash_Last_Updatd_By	\$ 5.00
<a href="#">0000000006</a>	3-10 TST 12 test	Returned	00000000000000000000000017718B	MULTI-PLATE RE+THEM	Cash@H	02/19/2023		Agency_Rover_App_NC	\$0.00
<a href="#">0000000008</a>	Test_mg1	Returned	00000000000000000000000017752D	MULTI-PLATE RE+THEM	Cash@H	02/29/2023			15.00

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

## SFS Handbook: Grantee Processing in SFS

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

Comments	Comment Entered By	Comment Entered On
1 Please add documentation	Agency_Rvwr_Appr_1C	10/04/2023 11:23AM

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

## SFS Handbook: Grantee Processing in SFS

✕ Exit

Update Claim

Contract Selection  
✔ Complete

Claim Header  
✔ Complete

Claim Lines  
✔ Complete

Claim Line Details  
✔ Complete

Claim Summary  
● Visited

Business Unit: OMH01      Claim Number: 000000399

Contract ID: 000000000000000000000000117744  
Description: OMH01-C00121GM-1000204  
Project Name: 000000000012111

Supplier ID: 1000016490  
Supplier Name: PEOPLES EQUAL ACTION AND COMMUNITY  
Supplier Location: MAINEPAY DBA PEACE INC SYRACUSE

Contract Begin Date:  
02/20/2023

Contract Expire Date: 02/19/2024

Contract Max Amount: 10,000.00  
Invoice ID: 100423\_TB\_INV2

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

Claim Initiated Date: 10/04/2023

Claim Line Details[Find | View](#)

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

Line Type: Reimbursement

Line Comments

Line Attachments

Reimbursement Claim Details

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

Claims Attachments

Help

Business Unit



OMH01



Claim Number

000000399

Line Number

1

Personalize | Find | View All |  

First  1 of 1  Last

	Description	Add Attachment	View Attachment	Attached File	
1	<input type="text" value="Training Document"/>	<input type="button" value="Add Attachment"/>	<input type="button" value="View Attachment"/>	Training_Document.pdf	<input type="button" value="+"/>

OK

Cancel

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



## SFS Handbook: Grantee Processing in SFS

**Claims Attachments** ×

Business Unit OMH01      Claim Number 000000399      Line Number 1

Personalize | Find | View All |      First 1-2 of 2 Last

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

OK      Cancel

Step	Action
14.	Click the <b>Add Attachment</b> button to upload additional documentation.

**Claims Attachments** ×

Business Unit OMH01      Claim Number 000000399      Line Number 1

Personalize | Find | View All |      First 1-2 of 2 Last

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

OK      Cancel

**File Attachment** ×

Choose File      Payroll Support.pdf

Upload      Cancel

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

## SFS Handbook: Grantee Processing in SFS

✕
Help

Business Unit OMH01
Claim Number 000000399
Line Number 1

Description	Add Attachment	View Attachment	Attached File
1 Training Document	Add Attachment	View Attachment	Training_Document.pdf
2 Additional Support	Add Attachment	View Attachment	Payroll_Support.pdf

First
1-2 of 2
Last

OK
Cancel

Step	Action
17.	Enter the document description in the <b>Description</b> field.
18.	Click the <b>OK</b> button.

X Exit

Update Claim

Contract Selection  
✔ Complete

Claim Header  
✔ Complete

Claim Lines  
✔ Complete

Claim Line Details  
✔ Complete

Claim Summary  
● Visited

Business Unit: OMH01      Claim Number: 000000399

Contract ID: 00000000000000000117744  
Description: OMH01-C00121GM-1000204  
Project Name: 000000000012111

Supplier ID: 1000016490  
Supplier Name: PEOPLES EQUAL ACTION AND COMMUNITY  
Supplier Location: MAINEPAY DBA.PEACE INC 217 S SALINA ST 2ND FL

Contract Begin Date: 02/20/2023  
Contract Expire Date: 02/19/2024  
Contract Max Amount: 10,000.00  
Invoice ID: 100423\_TB\_INV2  
Claim Initiated Date: 10/04/2023

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

Claim Line DetailsFind | View AllFirst1 of 1Last

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

Line Type: Reimbursement

Line Comments

Line Attachments

Reimbursement Claim Details

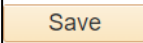
Budget Type CAPITALCost Incurred Date From 10/04/2023Cost Incurred Date To 10/04/2023

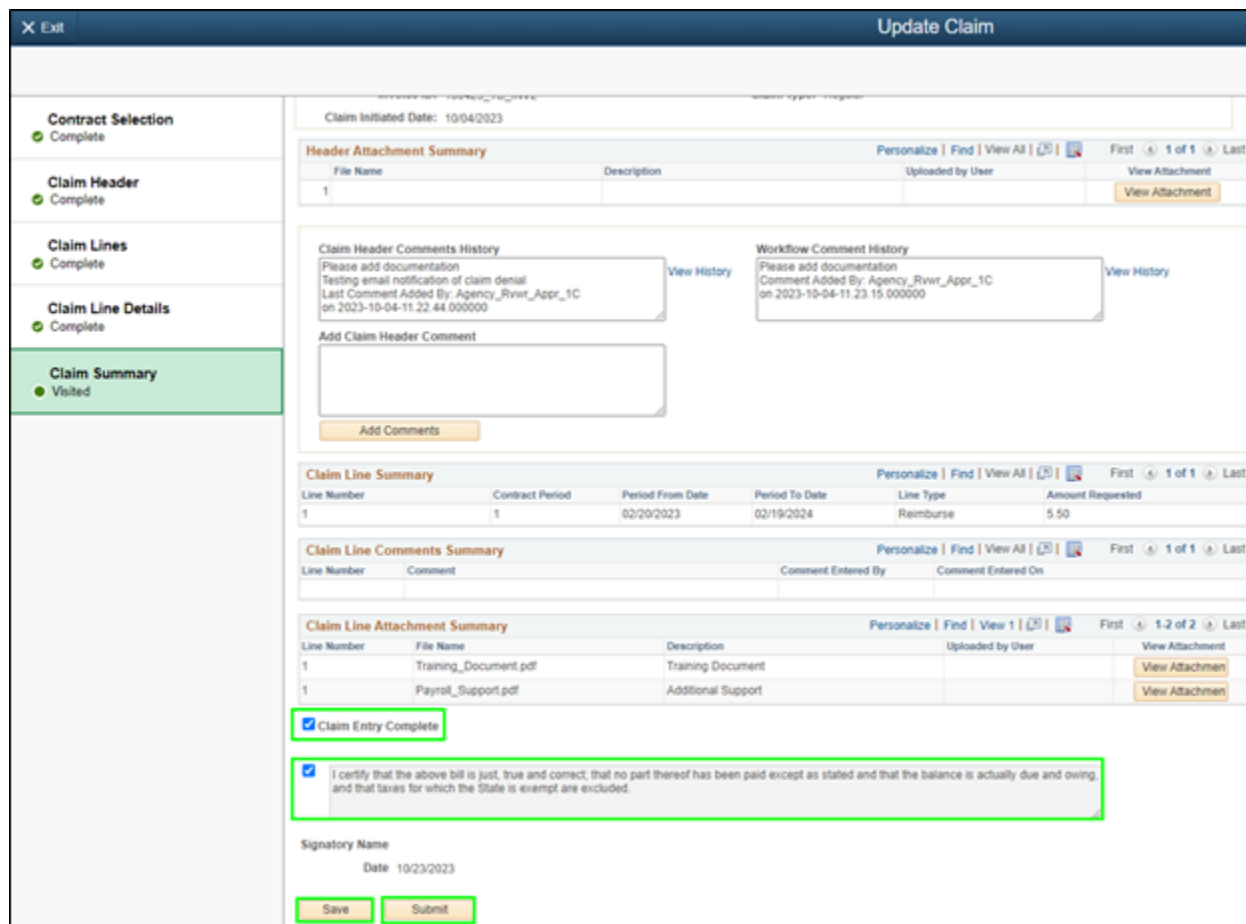
Reimbursement FundsPersonalize | Find | View All1 of 4Last

	Budget Category	Approved Grant Budget	Previous Cumulative Expenditure	In Process Expenditures	Expenditure for this Report	Reviewed Amount	Current Cumulative Expenditure
1	SCOPING & PRE-DEVELOPMENT	100.00	47.50	25.22	0.00	0.00	47.50
2	DESIGN	350.00	33.00	18.73	2.00	2.00	35.00
3	ACQUISITION	300.00	12.50	14.24	3.50	3.50	16.00
4	CONSTRUCTION	250.00	30.25	18.25	0.00	0.00	30.25
Grant Fund Totals		1,000.00	123.25	76.44	5.50	5.50	128.75
Match Fund Totals		0.00	0.00	0.00	0.00	0.00	0.00

Save

## SFS Handbook: Grantee Processing in SFS

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



**Update Claim**

Claim Initiated Date: 10/04/2023

**Header Attachment Summary**

File Name	Description	Uploaded by User	View Attachment
1			<a href="#">View Attachment</a>

**Claim Header Comments History**

Please add documentation  
Testing email notification of claim denial  
Last Comment Added By: Agency\_Rvwr\_Appl\_1C  
on 2023-10-04-11:22:44.000000 [View History](#)

**Workflow Comment History**

Please add documentation  
Comment Added By: Agency\_Rvwr\_Appl\_1C  
on 2023-10-04-11:23:15.000000 [View History](#)

Add Claim Header Comment

[Add Comments](#)

**Claim Line Summary**

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

**Claim Line Comments Summary**

Line Number	Comment	Comment Entered By	Comment Entered On

**Claim Line Attachment Summary**

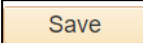
Line Number	File Name	Description	Uploaded by User	View Attachment
1	Training_Document.pdf	Training Document		<a href="#">View Attachment</a>
1	Payroll_Support.pdf	Additional Support		<a href="#">View Attachment</a>

☒ **Claim Entry Complete**

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

Signatory Name  
Date: 10/23/2023

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

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

# SFS Handbook: Grantee Processing in SFS

## Claim Inquiry

### Topic Description:

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

### Topic Objective:

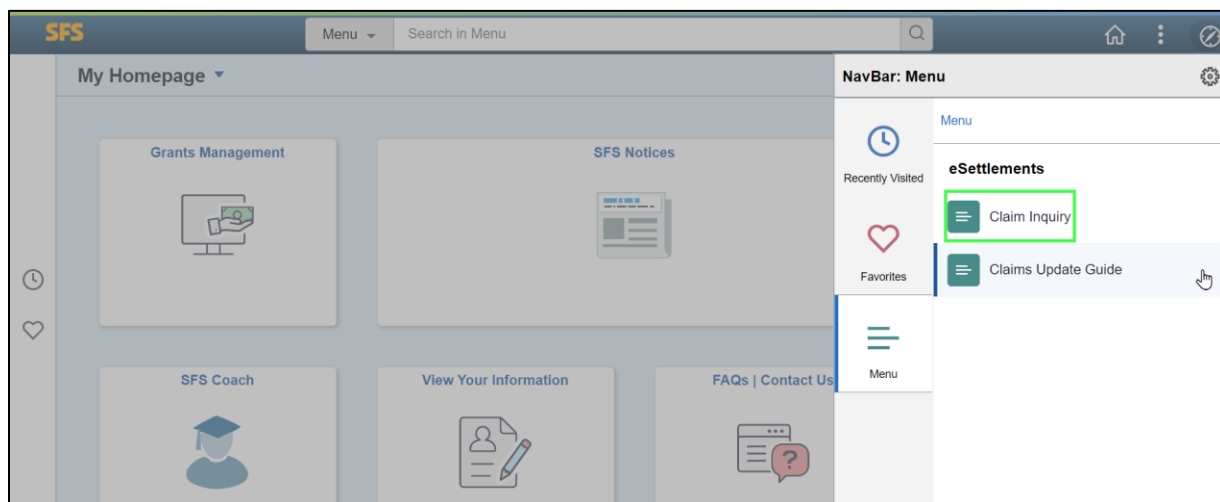
In this topic, you will learn:

- How to inquire on a claim

### Procedure:

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

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



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

## SFS Handbook: Grantee Processing in SFS

### Claim Inquiry

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

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

▼ Search Criteria


Inquiry Name

begins with ▼

Description

begins with ▼

☐ Case Sensitive

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

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

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

## SFS Handbook: Grantee Processing in SFS

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

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

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

## SFS Handbook: Grantee Processing in SFS

Claim Review via Inquiry

### Claim Review Summary

**Header Details**

Business Unit: OMH01  
Supplier Name: PEOPLES EQUAL ACTION AND COMMUNITY  
Supplier ID: 1000016490  
Supplier Location: MAINEPAY  
Description: OMH01-C00014GM-1090004  
Project Name: MULTI- PLATE RETHERM  
Contract Begin Dt: 01/24/2023  
Contract Expire Dt: 01/25/2024

Claim Number: 000000167  
Contract ID: 000000000000000000000000117523  
Contract Max Amount: \$10,000.00  
Grantee Claim Reference: 051823\_TB\_inv2  
Claim Date: 05/18/2023  
Net Days in Review: 121  
MIR Adjustment Date:

Claim Type: Regular  
Claim Initiated Dt:  
Claim Received Dt:  
Final Approval Dt:

Bypass eSettlement Review ☐  
Bypass Agency Voucher Approval ☐

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

**Line Details**

Line #	Line Type	Contract Period	Contract Period Amount	Requested Amount	Reviewed Amount	Net Payment Amount	Reviewed	Modified By	Modified On
1	Reimbursement	1	\$10,000.00	\$5.85	\$5.85	\$0.00	Yes	Agency_Rvwr_Appl_2C	06/13/2023 8:02:08AM

Claim Comments  
Comment entered by proxy  
Last Comment Added By : Agency\_Proxy\_D On : 05/18/2023 - 11:40 AM

Header Comments (1)  
Workflow Comments (2)

Add Comment

☐ Show to Supplier ☐ Show in Invoice

Attachments (0)

[Preview Claim](#)  
[View Approvals](#)

Save

Cancel

Step	Action
9.	Click the <a href="#">View Approvals</a> link.

Claim Review via Inquiry

### Claim Review Summary

**Header Details**

Business Unit: OMH01  
Supplier Name: PEOPLES EQUAL ACTION AND COMMUNITY  
Supplier ID: 1000016490  
Supplier Location: MAINEPAY

Claim Number: 000000167  
Contract ID: 000000000000000000000000117523  
Contract Max Amount: \$10,000.00  
Grantee Claim Reference: 051823\_TB\_inv2

Claim Type: Regular  
Claim Initiated Dt:  
Claim Received Dt:  
Final Approval Dt:

Claim Approvals Monitor

Help

#### Claims Approval Workflow Path

Claim Approval Workflow: Pending

Claims Approval Workflow

```

graph LR
    A[Approved  
Claims Approver Level 1  
05/18/23 - 12:00 PM] --> B[Pending  
Multiple Approvers  
Claims Approver Level 2]
    B --> C[Not Routed  
Multiple Approvers  
Claims Approver Level 3]
    C --> D[Not Routed  
Multiple Approvers  
Claims Approver Level 4]
    
```

Comment History  
at 05/18/23 - 11:48 AM  
[View History](#)

## SFS Handbook: Grantee Processing in SFS

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

### Claim Review Summary

**Header Details**

<b>Business Unit:</b> OMH01 <b>Supplier Name:</b> PEOPLES EQUAL ACTION AND COMMUNITY <b>Supplier ID:</b> 1000016490 <b>Supplier Location:</b> MAINEPAY <b>Description:</b> OMH01-C00014GM-1090004 <b>Project Name:</b> MULTI- PLATE RETHERM <b>Contract Begin Dt:</b> 01/24/2023 <b>Contract Expire Dt:</b> 01/25/2024	<b>Claim Number:</b> 000000167 <b>Contract ID:</b> 00000000000000000000117523 <b>Contract Max Amount:</b> \$10,000.00 <b>Grantee Claim Reference:</b> 051823_TB_inv2 <b>Claim Date:</b> 05/18/2023 <b>Net Days in Review:</b> 121 <b>MIR Adjustment Date:</b>	<b>Claim Type:</b> Regular  <b>Claim Initiated Dt:</b> <b>Claim Received Dt:</b> <b>Final Approval Dt:</b>
---	---	--

---

☒ Bypass eSettlement Review    
 ☐ Bypass Agency Voucher Approval    
 Claim Status: Agency Rev    
 Voucher ID:    
 Approval Step: 2

---

**Line Details**

Line #	Line Type	Contract Period	Contract Period Amount	Requested Amount	Reviewed Amount	Net Payment Amount	Reviewed	Modified By	Modified On
1	Reimbursement	1	\$10,000.00	\$5.85	\$5.85	\$0.00	Yes	Agency_Rvrer_Appr_2C	06/13/2023 8:02:06AM

**Claim Comments**

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

Add Comment

☒ Show to Supplier    
 ☐ Show in Invoice

Attachments (0)
[Preview Claim View Approvals](#)

Save
Cancel

Step	Action
11.	Click the <b>Reviewed Amount</b> button.



# SFS Handbook: Grantee Processing in SFS

**Review Claims Component**

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

Bypass eSettlement Review: ☒ Claim Line No: 1 Line Type: Reimbursement Reviewed: Yes Contract Period: 1  
 Bypass Agency Voucher Approval: ☐ Claim Status: Under Agency Review Voucher ID: Period Amount: \$10,000.00

Budget Type: EXPENDITURE Cost Incurred Date From: 05/08/2023 Cost Incurred Date To: 05/09/2023

**Reimbursement Funds** | 1-10 of 10

Budget Category	Approved Budget	Previous Cumulative Expenditures	In-Process	Expenditures for this Report	Reviewed Amount	Current Cumulative Expenditures	Detail
1 SALARY	\$30,500.00	\$0.00	\$4.00	\$2.00	\$2.00	\$2.00	<a href="#">i</a>
2 FRINGE	\$2,000.00	\$0.00	\$1.00	\$1.00	\$1.00	\$1.00	<a href="#">i</a>
3 CONTRACTUAL	\$1,200.00	\$0.00	\$0.16	\$1.50	\$1.50	\$1.50	<a href="#">i</a>
4 TRAVEL	\$13,000.00	\$0.00	\$0.14	\$1.35	\$1.35	\$1.35	<a href="#">i</a>
5 EQUIPMENT	\$2,500.00	\$0.00	\$2.60	\$0.00	\$0.00	\$0.00	<a href="#">i</a>
6 SPACE/PROPERTY RENT	\$2,300.00	\$0.00	\$0.15	\$0.00	\$0.00	\$0.00	<a href="#">i</a>
7 SPACE/PROPERTY OWN	\$800.00	\$0.00	\$10.00	\$0.00	\$0.00	\$0.00	<a href="#">i</a>
8 UTILITIES	\$275.00	\$0.00	\$2.85	\$0.00	\$0.00	\$0.00	<a href="#">i</a>
9 OPERATING EXPENSES	\$100.00	\$0.00	\$1.10	\$0.00	\$0.00	\$0.00	<a href="#">i</a>
10 OTHER	\$70.00	\$0.00	\$0.10	\$0.00	\$0.00	\$0.00	<a href="#">i</a>
<b>Total</b>	<b>\$52,745.00</b>	<b>\$0.00</b>	<b>\$22.10</b>	<b>\$5.85</b>	<b>\$5.85</b>	<b>\$5.85</b>	

**Match Funds** | 1-5 of 5

Budget Category	Approved Budget	Previous Cumulative Expenditure	In-Process	Expenditures for this Report	Reviewed Amount	Current Cumulative Expenditures
1 SALARY	\$3,607.50	\$0.00	\$0.20	\$0.00	\$0.00	\$0.00
2 FRINGE	\$0.00	\$0.00	\$0.30	\$0.00	\$0.00	\$0.00
3 TRAVEL	\$1,500.00	\$0.00	\$0.30	\$0.00	\$0.00	\$0.00
4 EQUIPMENT	\$320.00	\$0.00	\$0.20	\$0.00	\$0.00	\$0.00
5 OPERATING EXPENSES	\$12.50	\$0.00	\$0.75	\$0.00	\$0.00	\$0.00
<b>Total</b>	<b>\$5,440.00</b>	<b>\$0.00</b>	<b>\$1.75</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>

OK Cancel [Line Comments \(2\)](#) [Attachments \(1\)](#)

Step	Action
12.	Click the <a href="#">Line Comments</a> button (the number in parenthesis indicates the number of comments).

## SFS Handbook: Grantee Processing in SFS

Reimbursement Line Comments Help

**Line Comments**

Business Unit: OMH01    Claim Number: 000000167    Line Nbr: 1    Claim Type: Reimbursement

Add Line And Return

☒ Show to Supplier  
☒ Show In Invoice

**Line Comment History** Find    First    1-2 of 2    Last

Seq	2	line comment by reviewer	<input checked="" type="checkbox"/> Show to Supplier <input type="checkbox"/> Show In Invoice	Created By: D Created On: 05/18/23 11:58AM Role A
Seq	1	line comment	<input checked="" type="checkbox"/> Show to Supplier <input type="checkbox"/> Show In Invoice	Created By: Created On: 05/18/23 11:43AM Role P

OK

Cancel

Step	Action
13.	Click the <b>OK</b> button when your review of the line comments is complete.

Review Claims Component

Project Name: MULTI- PLATE RETHERM    Net Days in Review: 159

Contract Begin Dt: 01/24/2023  
Contract Expire Dt: 01/25/2024

Bypass eSettlement Review: ☒    Claim Line No: 1    Line Type: Reimbursement  
 Bypass Agency Voucher Approval: ☐    Claim Status: Under Agency Review

Reviewed: Yes    Contract Period: 1  
 Voucher ID:    Period Amount: \$10,000.00

Budget Type: EXPENDITURE    Cost Incurred Date From: 05/08/2023    Cost Incurred Date To: 05/09/2023

**Reimbursement Funds** 1-10 of 10

Grant	Budget Category	Approved Budget	Previous Cumulative Expenditures	In-Process	Expenditures for this Report	Reviewed Amount	Current Cumulative Expenditures	Detail
	1 SALARY	\$30,500.00	\$0.00	\$4.00	\$2.00	\$2.00	\$2.00	<a href="#">i</a>
	2 FRINGE	\$2,000.00	\$0.00	\$1.00	\$1.00	\$1.00	\$1.00	<a href="#">i</a>
	3 CONTRACTUAL	\$1,200.00	\$0.00	\$0.16	\$1.50	\$1.50	\$1.50	<a href="#">i</a>
	4 TRAVEL	\$13,000.00	\$0.00	\$0.14	\$1.35	\$1.35	\$1.35	<a href="#">i</a>
	5 EQUIPMENT	\$2,500.00	\$0.00	\$2.60	\$0.00	\$0.00	\$0.00	<a href="#">i</a>
	6 SPACE/PROPERTY RENT	\$2,300.00	\$0.00	\$0.15	\$0.00	\$0.00	\$0.00	<a href="#">i</a>
	7 SPACE/PROPERTY OWN	\$800.00	\$0.00	\$10.00	\$0.00	\$0.00	\$0.00	<a href="#">i</a>
	8 UTILITIES	\$275.00	\$0.00	\$2.85	\$0.00	\$0.00	\$0.00	<a href="#">i</a>
	9 OPERATING EXPENSES	\$100.00	\$0.00	\$1.10	\$0.00	\$0.00	\$0.00	<a href="#">i</a>
	10 OTHER	\$70.00	\$0.00	\$0.10	\$0.00	\$0.00	\$0.00	<a href="#">i</a>
<b>Total</b>		<b>\$52,745.00</b>	<b>\$0.00</b>	<b>\$22.10</b>	<b>\$5.85</b>	<b>\$5.85</b>	<b>\$5.85</b>	

**Match Funds** 1-5 of 5

Match	Budget Category	Approved Budget	Previous Cumulative Expenditure	In-Process	Expenditures for this Report	Reviewed Amount	Current Cumulative Expenditures
	1 SALARY	\$3,607.50	\$0.00	\$0.20	\$0.00	\$0.00	\$0.00
	2 FRINGE	\$0.00	\$0.00	\$0.30	\$0.00	\$0.00	\$0.00
	3 TRAVEL	\$1,500.00	\$0.00	\$0.30	\$0.00	\$0.00	\$0.00
	4 EQUIPMENT	\$320.00	\$0.00	\$0.20	\$0.00	\$0.00	\$0.00
	5 OPERATING EXPENSES	\$12.50	\$0.00	\$0.75	\$0.00	\$0.00	\$0.00
<b>Total</b>		<b>\$5,440.00</b>	<b>\$0.00</b>	<b>\$1.75</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>

Line Comments (2)

Attachments (1)

OK

Cancel

## SFS Handbook: Grantee Processing in SFS

Step	Action
14.	Click the <b>Attachments</b> button (the number in parenthesis indicates the number of attachments).

Reimbursement Line Attachments Help

**Line Attachments**

Business Unit: OMH01    Claim Number: 000000167    Line Nbr: 1    Claim Type: Reimbursement

**Upload Instructions**  
 Only PDF files can be uploaded.  
 Files greater than 20 Mb will not be allowed for upload.  
 Enter File Description before clicking on Add Attachment

File Description  Add Attachment

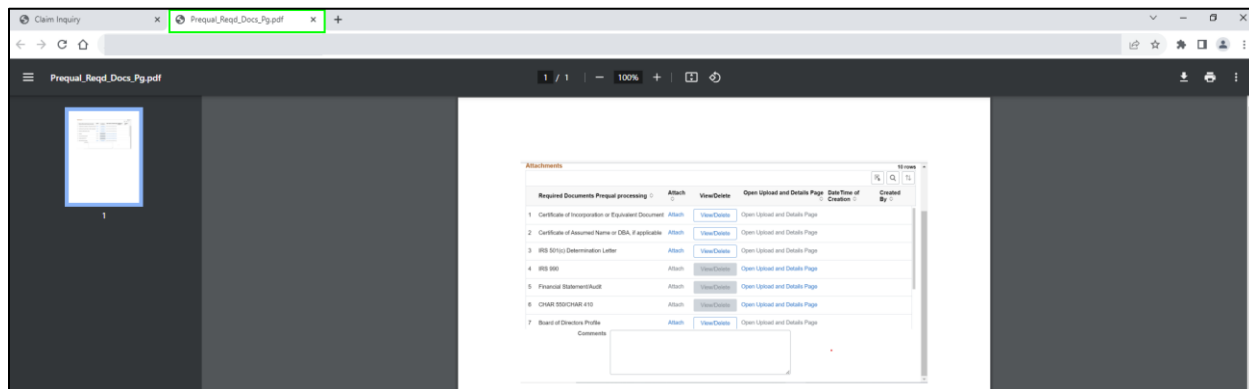
☒ Show To Supplier  
☒ Show In Invoice

**Line Attachments** First 1 of 1 Last

File Name	Description	Show To Supplier	Show In Invoice	Created By	Created On	View Attachment
1 Prequal_Reqd_Docs_Pg.pdf	Upload Example	<input checked="" type="checkbox"/>	<input type="checkbox"/>		05/18/23 11:41:39AM	<span style="border: 2px solid green; padding: 2px;">View Attachment</span>

OK Cancel

Step	Action
15.	Click the <b>View Attachment</b> button.



Step	Action
16.	When you are finished reviewing the attachment, click the <b>Close (X)</b> button.

## SFS Handbook: Grantee Processing in SFS

Reimbursement Line Attachments

Help

Line Attachments

Business Unit: OMH01    Claim Number: 000000167    Line Nbr: 1    Claim Type: Reimbursement

**Upload Instructions**  
Only PDF files can be uploaded.  
Files greater than 20 Mb will not allowed for upload.  
Enter File Description before clicking on Add Attachment

File Description

☒ Show To Supplier  
☒ Show In Invoice

Add Attachment

Line Attachments

First 1 of 1 Last

File Details

File Name	Description	Show To Supplier	Show In Invoice	Created By	Created On	View Attachment
1 Prequal_Reqd_Docs_Pg.pdf	Upload Example	<input checked="" type="checkbox"/>	<input type="checkbox"/>		05/18/23 11:41:39AM	<div>View Attachment</div>

OK

Cancel

Step	Action
17.	Click the <b>OK</b> button to return to the previous page.

# SFS Handbook: Grantee Processing in SFS

Review Claims Component

Project Name: MULTI- PLATE RETHERM
Net Days in Review: 159

Contract Begin Dt: 01/24/2023
Contract Expire Dt: 01/25/2024

Bypass eSettlement Review: ☒
Claim Line No: 1
Line Type: Reimbursement
Reviewed: Yes
Contract Period: 1

Bypass Agency Voucher Approval: ☐
Claim Status: Under Agency Review
Voucher ID:
Period Amount: \$10,000.00

Budget Type: EXPENDITURE
Cost Incurred Date From: 05/08/2023
Cost Incurred Date To: 05/09/2023

Grant

Reimbursement Funds
1-10 of 10

Budget Category	Approved Budget	Previous Cumulative Expenditures	In-Process	Expenditures for this Report	Reviewed Amount	Current Cumulative Expenditures	Detail
1 SALARY	\$30,500.00	\$0.00	\$4.00	\$2.00	\$2.00	\$2.00	
2 FRINGE	\$2,000.00	\$0.00	\$1.00	\$1.00	\$1.00	\$1.00	
3 CONTRACTUAL	\$1,200.00	\$0.00	\$0.16	\$1.50	\$1.50	\$1.50	
4 TRAVEL	\$13,000.00	\$0.00	\$0.14	\$1.35	\$1.35	\$1.35	
5 EQUIPMENT	\$2,500.00	\$0.00	\$2.60	\$0.00	\$0.00	\$0.00	
6 SPACE/PROPERTY RENT	\$2,300.00	\$0.00	\$0.15	\$0.00	\$0.00	\$0.00	
7 SPACE/PROPERTY OWN	\$800.00	\$0.00	\$10.00	\$0.00	\$0.00	\$0.00	
8 UTILITIES	\$275.00	\$0.00	\$2.85	\$0.00	\$0.00	\$0.00	
9 OPERATING EXPENSES	\$100.00	\$0.00	\$1.10	\$0.00	\$0.00	\$0.00	
10 OTHER	\$70.00	\$0.00	\$0.10	\$0.00	\$0.00	\$0.00	
Total	\$52,745.00	\$0.00	\$22.10	\$5.85	\$5.85	\$5.85	

Match Funds
1-5 of 5

Budget Category	Approved Budget	Previous Cumulative Expenditure	In-Process	Expenditures for this Report	Reviewed Amount	Current Cumulative Expenditures
1 SALARY	\$3,607.50	\$0.00	\$0.20	\$0.00	\$0.00	\$0.00
2 FRINGE	\$0.00	\$0.00	\$0.30	\$0.00	\$0.00	\$0.00
3 TRAVEL	\$1,500.00	\$0.00	\$0.30	\$0.00	\$0.00	\$0.00
4 EQUIPMENT	\$320.00	\$0.00	\$0.20	\$0.00	\$0.00	\$0.00
5 OPERATING EXPENSES	\$12.50	\$0.00	\$0.75	\$0.00	\$0.00	\$0.00
Total	\$5,440.00	\$0.00	\$1.75	\$0.00	\$0.00	\$0.00

OK

Cancel

Line Comments (2)

Attachments (1)

Step	Action
18.	Click the <b>OK</b> button to return to the previous page.

## SFS Handbook: Grantee Processing in SFS

My Homepage

Claim Review Summary

Claim Review Summary

Header Details

Business Unit: OMH01

Supplier Name: PEOPLES EQUAL ACTION AND COMMUNITY

Supplier ID: 1000016490

Supplier Location: MAINEPAY

Description: OMH01-C00014GM-1090004

Project Name: MULTI- PLATE RETHERM

Contract Begin Dt: 01/24/2023

Contract Expire Dt: 01/25/2024

Claim Number: 000000167

Contract ID: 000000000000000000000000117523

Contract Max Amount: \$10,000.00

Grantee Claim Reference: 051823\_TB\_inv2

Claim Date: 05/18/2023

Net Days in Review: 159

MIR Adjustment Date:

Claim Type: Regular

Claim Initiated Dt:

Claim Received Dt:

Final Approval Dt:

Bypass eSettlement Review ☒

Bypass Agency Voucher Approval ☐

Claim Status: Under Agency Review

Voucher ID:

Approval Step: 2

Line Details

1 of 1

Last

Line #	Line Type	Contract Period	Contract Period Amount	Requested Amount	Reviewed Amount	Net Payment Amount	Reviewed	Modified By	Modified On
1	Reimbursement	1	\$10,000.00	\$5.85	\$5.85	\$5.85	Yes	PeaceInc	10/24/2023 8:13:32AM

Claim Comments

Comment entered by proxy

Last Comment Added By : AM

On : 05/18/2023 - 11:40

Header Comments (1)

Workflow Comments (2)

Add Comment

☒ Show to Supplier

☐ Show in Invoice

Save

Cancel

Attachments (0)

Preview Claim

View Approvals

Step	Action
19.	Click the <b>Header Comments</b> link to view any header comments for the claim.
20.	Click the <b>Workflow Comments</b> link to view workflow comments for the claim.
21.	Click the <b>Attachments</b> button to view any header attachments for the claim.
22.	Click the <b>Preview Claim</b> link to view the pdf version of the claim.  <b>Note:</b> 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 <b>Attachments</b> button.
23.	You have successfully completed the <b>Claim Inquiry</b> topic.

# SFS Handbook: Grantee Processing in SFS

## Grantee Reports and Queries

### Lesson Description:

This lesson provides the knowledge and skills to process grantee reports and queries.

### Lesson Objectives:

In this lesson, you will learn how to:

- Run the Vendor Contract Summary Report

## Run the Vendor Contract Summary Report

### Topic Description:

This topic provides the knowledge and skills to run the Vendor Contract Summary report. This report provides grant related contract and bid event data at a summary level.

### Topic Objectives:

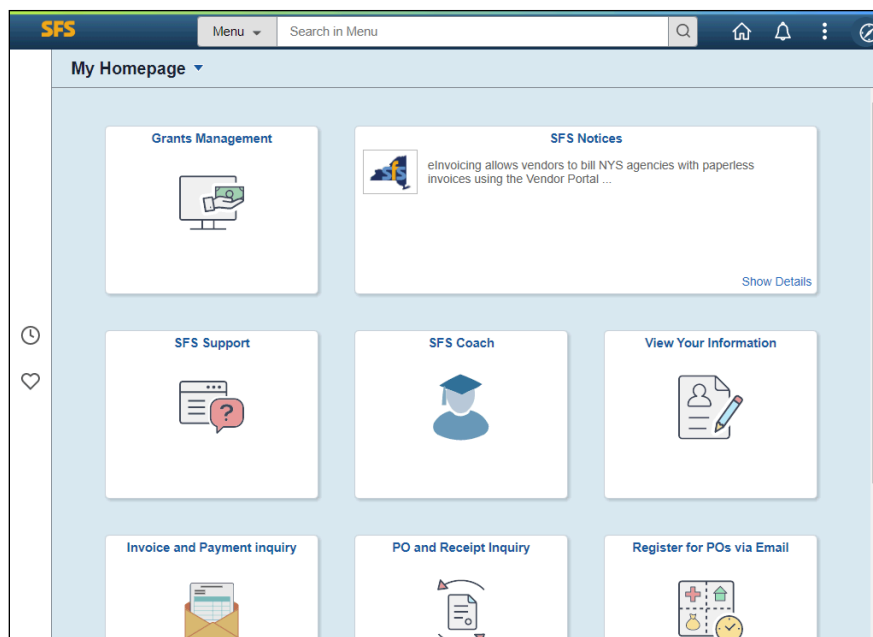
In this topic, you will learn:

- How to run the Vendor Contract Summary report.

## Procedure

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

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



## SFS Handbook: Grantee Processing in SFS

Step	Action
1.	From the <b>NavBar</b> navigate to: Menu > Manage Contracts > Vendor Contract Summary Report

SetID

SHARE

\*Business Unit

Bid Event ID

Vendor Type

Vendor ID

Contract ID

NYS Contract Number

Contract Status

Contract Type

Contract Begin Date

Contract Expire Date

Period

0

Period From

Period To

View Results

Row	Business Unit	Contract ID	NYS Contract Number	Bid Event ID	Bid Event Name	Organization Type	Vendor ID	Vendor Name	Contract Type	Contract Status	Contract Begin Date	Contract Expire Date	Contract Amount	Period	Period From	Period To	Project ID	Project Description
-----	---------------	-------------	---------------------	--------------	----------------	-------------------	-----------	-------------	---------------	-----------------	---------------------	----------------------	-----------------	--------	-------------	-----------	------------	---------------------

Step	Action
2.	<p>Enter the applicable values in the search criteria fields which consist of the following fields:</p> <p>SetID, Business Unit, Bid Event ID, Vendor Type, Vendor ID, Contract ID, NYS Contract Number, Contract Status, Contract Type, Contract Begin Date, Contract Expire Date, Period, Period From Date, and Period To Date.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>SetID defaults to SHARE and doesn't need to be changed.</li> <li>SetID and Business Unit are required fields. Business Unit is the SFS ID for the NYS Agency.</li> </ul>
3.	Click the <b>View Results</b> button to display the search results based on the entered search criteria.

HW\_ES\_CONTRACT\_SUMMARY\_QRY - Vendor Contract Summary Report

---

Select [SHARE]

\*Business Unit OMH01

Bid Event ID

Vendor Type Not-For-Profit

Vendor ID

Contract ID

NYS Contract Number

Contract Status

Contract Type

Contract Begin Date

Contract Expire Date

Period From

Period To

[View Results](#)

Download results in 
 [Excel Spreadsheet](#)
[CSV Text File](#)
[XML File \(.S40 xls\)](#)

First 1-100 of 1029 | Last

Row	Business Unit	Contract ID	NYS Contract Number	Bid Event ID	Bid Event Name	Organization Type	Vendor ID	Vendor Name	Contract Type	Contract Status	Contract Begin Date	Contract Expire Date	Contract Amount	Period	Period From	Period To	Project ID	Project Description
1	OMH01	000000000000000000000009999	OMH01-C0022TGG-3650000		NPFT		1000006296	AUGUST AICHORN CENTER FOR ADOLESCENT	MT	A	12/07/2015	12/06/2020	1614625.000					
2	OMH01	000000000000000000000099549	OMH01-C20919GQ-3650000		NPFT		1000002619	MENTAL HEALTH ASSOCIATION OF ROCKLAND	MY	P	01/01/2020	12/31/2024	3919087.000	2	01/01/2021	12/31/2021	0000000000062024	
3	OMH01	000000000000000000000065649	OMH01-C20919GQ-3650000		NPFT		1000002619	MENTAL HEALTH ASSOCIATION OF ROCKLAND	MY	P	01/01/2020	12/31/2024	3919087.000	3	01/01/2022	12/31/2022	0000000000062024	
4	OMH01	000000000000000000000065649	OMH01-C20919GQ-3650000		NPFT		1000002619	MENTAL HEALTH ASSOCIATION OF ROCKLAND	MY	P	01/01/2020	12/31/2024	3919087.000	1	01/01/2020	12/31/2020	0000000000062024	
5	OMH01	000000000000000000000075769	OMH01-C21183GG-3650000		NPFT		1000001580	PARSONS CHILD AND FAMILY CENTER	MY	P	07/01/2020	12/31/2025	1200000.000	2	01/01/2021	12/31/2021	2081NYCMHSZ	
6	OMH01	000000000000000000000075769	OMH01-C21183GG-3650000		NPFT		1000001580	PARSONS CHILD AND FAMILY CENTER	MY	P	07/01/2020	12/31/2025	1200000.000	1	07/01/2020	12/31/2020	2081NYCMHSZ	
7	OMH01	000000000000000000000089009	OMH01-C21282GQ-3650000		NPFT		1000003312	SUNSET PARK HEALTH COUNCIL INC	MY	C	07/01/2021	06/30/2026	319962.000	1	07/01/2021	06/30/2022	00000000000061713	
8	OMH01	000000000000000000000089009	OMH01-C21282GQ-3650000		NPFT		1000003312	SUNSET PARK HEALTH COUNCIL INC	MY	C	07/01/2021	06/30/2026	319962.000	2	07/01/2022	06/30/2023	00000000000061713	
9	OMH01	000000000000000000000099999	OMH01-C21366GQ-3650000		NPFT		1000007669	SUICIDE PREVENTION & CRISIS SERVICE INC	FT	P	07/01/2021	06/30/2022	300000.000	1	07/01/2021	06/30/2022	0000000000046638	
10	OMH01	000000000000000000000102939	OMH01-C22245GQ-3650000		NPFT		1000007250	BEHAVIORAL HEALTH SERVICES NORTH INC	MY	P	04/01/2022	12/31/2026	3938004.000	1	04/01/2022	12/31/2022	000000000000448812	
11	OMH01	000000000000000000000103649	OMH01-C21699GQ-3650000		NPFT		1000002416	FAMILY RESIDENCES AND RESIDENTIAL	MY	P	07/15/2021	12/31/2024	3625252.000	1	07/15/2021	12/31/2021	00000000000091514	



## SFS Handbook: Grantee Processing in SFS

Step	Action
4.	Review the search results which consists of the following data elements:  Business Unit, Contract ID, NYS Contract Number, Bid Event ID, Bid Event Name, Organization Type, Vendor ID, Vendor Name, Contract Type, Contract Status, Contract Begin Date, Contract Expire Date, Contract Amount, Period, Period From Date, Period To Date, Project ID, and Project Description.
5.	<b>Note:</b> The results can be downloaded into an <b>Excel Spreadsheet</b> , a <b>CSV Text File</b> , or an <b>XML File</b> by clicking on the appropriate link.
6.	You have successfully completed the <b>Run the Vendor Contract Summary Report</b> topic.