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

Published Date: November 30, 2023
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For questions regarding the information included in this Guide, contact the SFS Help Desk:
Phone: 518-457-7717 or 855-233-8363 (toll free) | Email: HelpDesk@sfs.ny.gov |
Using the SFS Support tile in the SFS Vendor Portal
Grantee Processing in SFS

Handbook Description:

This Handbook provides the knowledge and skills to support 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.
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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Navigate to the SFS Public Portal Homepage.  
      | **Note:** Users **DO NOT** need to log in to SFS, as this is a public page. |
| 2.   | **Note:** If you experience issues within the Vendor Portal, you may need to clear your browser cache. You can press Ctrl+Shift+Del to expedite the clearing process. Also, verify the Passwords checkbox is unselected. This will allow you to keep all saved passwords and usernames after clearing your cache. |
3. From the SFS Public Portal Homepage, click the **Search for Grant Opportunities** tile.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td><strong>The Search for Grant Opportunities</strong> page is used to search for opportunities posted by agencies. Enter the applicable search criteria in the <strong>Search Criteria</strong> fields. In this example, we will search for grant opportunities by <strong>Status</strong> and by <strong>Service Area</strong>, which are the most common search methods.</td>
</tr>
</tbody>
</table>
| 5.   | **The Search by Status** options are:  
- **Anticipated**: Only the Abstract (summary) is available to view, not the entire bid event.  
- **Available**: Bid event is open for grantees to review and submit bid responses based on Preview/Start Date.  
- **Anticipated and Available**: Includes bid events in both Anticipated and Available statuses in the search results.  
- **Closed**: Includes bid events where the end date has passed, and grantees can no longer bid on the grant opportunity. |
| 6.   | In this example, we will click the **Search by Status** field drop-down list and select the **Available** list item. |
| 7.   | When you search by **Service Area**, only the bid events represented by the selected service area will display in the search results. |
| 8.   | In this example, we will click the **Search by Service Area** field drop-down list and select the **Environmental Supports** list item. |
| 9.   | Click the **Search** button. |
| 10.  | **Note**: A list of Event IDs will populate in the Search Results based on the current search criteria. Click the applicable link in the **Grant Opportunity** column to view the abstract details. |
### Step 11

**Action**  
Click the **View Grant Opportunity** button to view the Request for Proposal (RFP) pdf associated to the grant opportunity.
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<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.</td>
<td>Click the <strong>Close (X)</strong> browser tab when you are finished viewing the Request for Proposal (RFP) pdf associated to the grant opportunity.</td>
</tr>
</tbody>
</table>

#### Note:
If you have access to log in to the SFS Vendor Portal and are interested in applying for this grant, click the **Log into SFS and Apply for Grant** button to access the SFS Vendor portal.

In this training example, we will not click the **Log into SFS and Apply for Grant** button.

#### Note:
If you do not have access to the SFS Vendor Portal and if your organization is already established within the SFS Vendor portal, an SFS Delegated Administrator has been authorized within your organization to provision user login credentials, unlock accounts, or reset passwords. Please reach out to your SFS Delegated Administrator directly.

Also, if you do not have a login and if you are new to the SFS Vendor portal, and would like to establish an account for the purposes of doing business with the State of New York, contact the SFS Help Desk at 518-457-7717, 855-233-8363 or **HelpDesk@sfs.ny.gov** for more information.
Step | Action
--- | ---
15. | Click the **Return to Search** button to return to the **Search for Grant Opportunities** page.
16. | You have successfully completed the **Search For a Bid Event (Grant Opportunity) On the SFS Public Portal** topic.

**Subscribing to Email Notifications**

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

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

**Subscribe to Email Notifications**

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

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

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

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Navigate to [SFS Public Portal Homepage](#).  
**Note:** Users **DO NOT** need to log in to SFS, as this is a public page. |
| 2.   | **Note:** If you experience issues within the Vendor Portal, you may need to clear your browser cache. You can press Ctrl+Shift+Del to expedite the clearing process. Also, verify the Passwords checkbox is unselected. This will allow you to keep all saved passwords and usernames after clearing your cache. |
| 3.   | Click the **SignUp for Grant Notifications** tile. |
### SFS Handbook: Grantee Processing in SFS

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

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

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

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

#### Step 5.
Click the **Search** button.
Your previous information and selections will populate. Update your information and/or service area preferences.

To unsubscribe from all prior selected service areas, click the Un-subscribe checkbox.

Click the Save button to save your changes.

You have successfully completed the Modifying Email Notifications topic.

Maintaining Grantee Information

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

Lesson Objectives:
In this lesson, you will learn how to:

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

View and Update Grantee Information

TopicDescription:
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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to the <a href="#">SFS Vendor Portal</a>.</td>
</tr>
<tr>
<td>2.</td>
<td>Enter your <strong>User ID</strong> and <strong>Password</strong> and select the <strong>I agree to Vendor Online Services’ Terms of Service</strong> checkbox.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Sign In</strong> button.</td>
</tr>
</tbody>
</table>
Step | Action
---|---
4. | From the **Homepage** click the **View Your Information** tile.

5. | Click the **View Grants Information** tile.
Step | Action
--- | ---
6. | Review the information. If changes are needed, initiate a Supplier Change Request.
7. **Note:**
   - The **Supplier Change Request** feature in SFS allows grantees to make changes to their organization profile, addresses, contacts, banking information, and grant information.
   - Requests to change Primary Contact, Legal Business Name, Remittance Address and Banking require approval by the Office of the State Comptroller's Vendor Management Unit.
8. | Click the **Home** icon to go back to the Homepage to initiate the Supplier Change Request.
### SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.</td>
<td>Click the <strong>Supplier Change Request</strong> tile.</td>
</tr>
</tbody>
</table>

![Image of Supplier Change Request tile]

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>Click the <strong>GM Info</strong> train stop.</td>
</tr>
</tbody>
</table>

![Image of GM Info train stop]

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.</td>
<td>To update the information currently displayed, click the <strong>Add a New Row (+)</strong> icon.</td>
</tr>
<tr>
<td>12.</td>
<td>Make any needed updates to your Grants Management information.</td>
</tr>
<tr>
<td>13.</td>
<td>Select <strong>Next</strong> button.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
14. | Select the applicable **Audit Reason Code**.

**Note**: **Audit Reason Code** classifies the type of change that was made. Some examples are: Address Change, Name Change, Corrections, etc.

15. | Enter any additional information in the **Comments** field to clarify what was changed.

**Note**: Comments are optional.

16. | Select **Confirm Changes** checkbox.

17. | Select **Submit** button to make the changes.

**Note**: Upon submitting the Supplier Change Request, the information entered on the GM Info train stop will systematically update the corresponding fields on the View Grants Information Tab. Any changes made to information on the Grants Information tab will result in a new Effective Dated row.

18. | You have successfully completed the **View and Update Grantee Information** topic.

---

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

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

**Topic Objectives:**
In this topic, you will learn:
- How to add a grant contract approver’s name to their profile in SFS

**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.

![SFS Vendor Portal](image)

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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</thead>
<tbody>
<tr>
<td>8.</td>
<td>Click the <strong>Find Existing User ID</strong> tab.</td>
</tr>
<tr>
<td>9.</td>
<td>Enter the contract approver’s User ID in the <strong>User ID begins with</strong> field.</td>
</tr>
<tr>
<td>10.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
</tbody>
</table>
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

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

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<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>Begin by navigating to the SFS Vendor Portal.</td>
</tr>
<tr>
<td>5.</td>
<td>Enter your <strong>User ID</strong> and <strong>Password</strong> and select the <strong>I agree to Vendor Online Services’ Terms of Service</strong> checkbox.</td>
</tr>
<tr>
<td>6.</td>
<td>Click the <strong>Sign In</strong> button.</td>
</tr>
</tbody>
</table>
Step 4. **Preferred Navigation:** Click the **Grant Management** tile.

**Alternative Navigation:** From the **NavBar** navigate to: **Menu > Manage Events and Place Bids > Prequalification.**

Step 5. Click the **Prequalification Application** tile.
Step | Action
--- | ---
6. | On the Welcome Page, your **Supplier ID** is defaulted based on your user credentials, as well as your Organization Type. You are presented with one of the following options:

- **Initiate a Prequalification Application**: allows you to start a brand-new application. This option only displays for application version 1.
  - **Note**: Application version 1 represents the grantee’s initial prequalification application with no prior versions in SFS.

- **Collaborate on a Prequalification Application**: allows you to update an application that is in progress but has not yet been submitted for NYS Agency approval.

- **Update a Prequalification Application**: is available once an organization’s previous application has been approved/ expired and begins a new application version.

Select the applicable option under the **Select an Activity Below** text.
Step 7. Click the Next button.
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<table>
<thead>
<tr>
<th>Step</th>
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</thead>
<tbody>
<tr>
<td>8.</td>
<td>Enter the agency business unit that you expect to do business with into the <strong>State Agency</strong> field or click the magnifying glass icon to look up the information. If you are unsure of the business unit for the State Agency you expect to do business with, click the <strong>magnifying glass</strong> to view a list of business units and state agencies.</td>
</tr>
</tbody>
</table>

#### Lookup

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>State Agency Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>DNA01</td>
<td>Office of Veterans' Affairs</td>
</tr>
<tr>
<td>ESD01</td>
<td>Empire State Development</td>
</tr>
<tr>
<td>GTS01</td>
<td>Governor's Traffic Safety Committee</td>
</tr>
<tr>
<td>HCR01</td>
<td>NYS Homes and Community Renewal</td>
</tr>
<tr>
<td>HES01</td>
<td>Higher Education Services Corporation</td>
</tr>
<tr>
<td>ICL01</td>
<td>Interest on Lawyers Account</td>
</tr>
<tr>
<td>JUS01</td>
<td>Justice Center</td>
</tr>
<tr>
<td>OAS01</td>
<td>Office of Addiction Services and Supports</td>
</tr>
<tr>
<td>OFA01</td>
<td>Office for the Aging</td>
</tr>
<tr>
<td>OLH01</td>
<td>Office of Indigent Legal Services</td>
</tr>
<tr>
<td>OMH01</td>
<td>Office of Mental Health</td>
</tr>
<tr>
<td>OPD01</td>
<td>Office for People with Developmental Disabilities</td>
</tr>
<tr>
<td>OVS01</td>
<td>Office of Victim Services</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.</td>
<td>Click the scrollbar to scroll through the list of agencies and select the business unit associated to the state agency that you expect to do business with.</td>
</tr>
</tbody>
</table>
Step 10. Enter the applicable tax year end date (format MM/DD) into the **Tax Year End Date** field.
11. Organizations must complete an online Prequalification application in SFS which includes answering Profile Questions regarding the organization and uploading key organizational documents.

**Note:** Questions may vary based on your **Organization Type**.

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

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

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

**Note:** There are two list item questions (questions 15 and 18).
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>14.</td>
<td>Select one of the <strong>options</strong> from <strong>List Options</strong>.</td>
</tr>
<tr>
<td>15.</td>
<td>Click <strong>Return</strong>.</td>
</tr>
</tbody>
</table>
### Step 16
Complete questions shown as **List Item** by selecting the magnifying glass which is question 18 in this example.

#### List Options

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

**Return**

### Step 17
Select **Yes** for all the items your board reviews and/or approves.

### Step 18
Click **Return**.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 19.  | Enter any additional comments that you want the agency to see, in the **Comments** field located at the bottom of the page.  
**Note:** The **Comments** field could also be used to explain why your organization reviews some, but not all of the items listed in question 18. |
| 20.  | Click the **Next** button. |
Step | Action
--- | ---
21. | The **Required Documents** page is where you will upload the required documents for the agency to review.

22. | On the **Required Documents** page:
- All attachments must be in PDF format. Uploading any other document types will result in automatic deletion by the system.
- All rows must have an attachment uploaded for the Submit button to appear on the Prequalification application.
- You may need to scroll to see all the documents.
Step 23. To add an attachment, click the Attach link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>24.</td>
<td>Click the <strong>Add Attachment</strong> button.</td>
</tr>
<tr>
<td>25.</td>
<td>Click the <strong>My Device</strong> button.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
26. | Navigate to the directory location and **select** the applicable document for attachment.
Step | Action
--- | ---
27. | Click the **Open** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>28.</td>
<td>Click the <strong>Upload</strong> button.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Certificate of Incorporation.pdf</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Size: 34KB</td>
</tr>
</tbody>
</table>
## Step 29. Action

Click the **Done** button.
Step 30. Enter the applicable value in the Description field which should describe the document that was just attached. Note: This description will be visible to both agency and grantee.
Step | Action
--- | ---
31. | Click the **Done** button.
### Step 32. Action
Follow the same process to add attachments for any additional rows, using the Attach link.

![Image](image.png)

### Step 33. Action
To view an existing attachment, click the View/Delete button.

**Note:** If the View/Delete button is not active, then a document hasn’t been attached.
Step | Action
--- | ---
34. | To open the attachment, click the **File Name link**.

In this example, we will not open the linked attachment.
Step 35. When you are finished viewing attachments, click the **Done** button.
Step 36. **Note:** Not for Profit Organizations must upload IRS 990 information. To do this, use the Attach with Additional Date Details link.
## SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>37.</td>
<td>Click the <strong>Attach with Additional Date Details</strong> link.</td>
</tr>
</tbody>
</table>

### Attach with Additional Date Details

**IR-5960 General Instructions**
- Nonprofits must upload their most recent IR-5960. If an organization has not yet filed its initial IR-5960 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 Tax Due filed will automatically populate.
- Nonprofits that are exempt from filing, or those that have filed late or have an asterisk next to their name will have an editable column to enter the tax year covered by their return.
- Nonprofits that have filed late must enter the tax year covered by the return.

**CHARIS or CHAIRHS General Instructions**
- Nonprofits must upload their most recent Annual Filing for Charitable Organizations (CHAIRIS) or Documentation of Exemption from the IRS (Charities Bureau). If an Organization has not filed its most recent CHAIRIS, it should upload the Registration Statement for Charitable Organizations (CHAIRHS).
- Enter the Tax Year Begin and End dates and the tax due date will automatically populate.
- Nonprofits that are exempt from filing should upload proof of exemption and enter the Begin and End dates of their current tax year.
- Prequalification Specialists will evaluate the documentation and set the exempt flag accordingly.

Avoid Multiple Filing General Instructions
- Nonprofits may upload their most recent 990-A years, independent audit, or 990-A and any electronic filing. If an organization does not have any of these documents, it should upload a copy of the current and prior years’ budgets.
- Enter the Tax Year Begin and End dates for the period covered by the most recent audit and the Date Tax Due filed will automatically populate.

Closing the Following Sections on the top of the page will cause the latest actions:
- Close: Allows you to leave the page and exit the system
- Save: Saves the page without saving changes

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

<table>
<thead>
<tr>
<th>View</th>
<th>Application ID</th>
<th>Version Number</th>
<th>Submission ID</th>
<th>Supplier ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Application ID</td>
<td>Version Number</td>
<td>Submission ID</td>
<td>Supplier ID</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>39.</td>
<td>Click the <strong>Add Attachment</strong> button.</td>
</tr>
</tbody>
</table>
## SFS Handbook: Grantee Processing in SFS

### Step 40
**Action**
Click the **My Device** button.

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

44. Click the **Done** button.
Step | Action
---|---
45. | Enter the applicable date (format MM/DD/YYYY) in the **Tax Year Begin Date** field or click the **Calendar** icon to select the date.

46. | Enter the applicable date (format MM/DD/YYYY) in the **Tax Year End Date** field or click the **Calendar** icon to select the date.
47. Click the **Done** button.

48. Follow the same process to add attachments for any additional rows with the **Attach with Additional Date Details** link.
49. Click the **Next** button.
### Step 50
Click the **Add Contacts** button to add a contact person from your organization who should receive email notifications regarding the prequalification application and who the agency can contact if they have questions about the prequalification application.

**Note**: There will be system email notifications to the grantee contact(s) when their prequalification application is Submitted, Approved, Requested for More Information, Expired, or Due to Expire.

![Add New Contact](image)

### Step 51
Enter the applicable value in the **Description** field.

This can be a description of the contact, such as **Prequal Contact**. If your organization will have multiple contacts, you want to consider **Primary Prequal Contact** or **Secondary Prequal Contact**.
### Step 52
Enter the applicable value in the **First Name** field.

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

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

### Step 55
Enter the applicable value in the **Telephone** field.
### Step 56
The **Title**, **Fax Number**, and **Contact Type** fields are optional, and can be populated or left blank.

### Step 57
Click the **Done** button.
## SFS Handbook: Grantee Processing in SFS

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

### Step 60. On the **Submit** page, you certify that you are authorized to submit the information on the prequalification application and submit the prequalification application for agency review. You also have the option to review the information that you entered on the application, prior to submitting.

To certify, click the **Attestation** toggle option to **Yes**.

**Note:** If you made additional changes to the application after clicking **Yes**, then you will need to reset the application before submitting by toggling back to **No** and then back to **Yes**.
61. If you are interested in reviewing all the information that you entered on the application, before you submit, click the Review button. In this example, we will not click the review button.

Note: This is an optional step.

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

63. To submit the application for agency review, click the Submit button.
Step | Action
--- | ---
64. | The application is routed for review to the agency you selected in the State Agency field, on the **Organization Information** section.
   
   **Note:** There will be system email notifications to the contact(s) listed in the Contacts section when the prequalification application is Submitted, Approved by the agency, or returned by the agency for more information.

65. | To return to the **Prequalification Welcome** page, click the **Return to Prequalification Welcome page** link or click the **Home** icon in the upper right corner of the page to return to the SFS Vendor Portal homepage.

66. | You have successfully completed the **Enter and Submit a Prequalification Application** topic.

**Responding to Bid Events (Grant Opportunities)**

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

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

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

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

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

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

**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 Vendor Portal](image)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | **Preferred Navigation:** Click the **Grant Management** tile.  
**Alternative Navigation:** From the **NavBar** navigate to: Menu > Manage Events and Place Bids > View Events and Place Bids |
|      | **Note:** You must log in to the SFS Vendor Portal to respond to a bid event. |
**SFS Handbook: Grantee Processing in SFS**

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

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

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

### Additional Bid Response fields

<table>
<thead>
<tr>
<th>Additional Bid Response Info</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Organization Type</strong></td>
</tr>
<tr>
<td><strong>Taxpayer Identification Number</strong></td>
</tr>
<tr>
<td><strong>Bidders Conference Application Workshop</strong></td>
</tr>
<tr>
<td><strong>Contract Type</strong></td>
</tr>
<tr>
<td><strong>Length</strong></td>
</tr>
<tr>
<td><strong>Narrative</strong></td>
</tr>
</tbody>
</table>

- **Letter of Intent**
- **Provide a Link**
- **Questions & Answers Link**
- **Questions & Answers Narrative**

[OK] [Cancel]

---

9. | Review the **Additional Bid Info**.
| Click the **OK** button to return to the **Event Details** page.

---

**Step 2: Enter Line Bid Responses**

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

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

[Hide Line Details]

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

**Event Comments and Attachments**

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

[Submit Bid] [Save For Later] [Validate Entries]

**Return to Event Search**

---

10. | Select the **Events Comments and Attachments** link, located at the bottom of the page, to view any instructions, attachments and/or comments. You may need to scroll to see this link.
Step 11. Click the OK button after viewing the instructions, attachments, and comments.
Step | Action
--- | ---
12. | Use the scrollbar to navigate to the **Step 1: Answer General Event Questions** section.
13. | If applicable, enter a **DUNS Number** in the **DUNS Number** field. This field is optional and not required.
14. | If applicable, enter your **Organization Website** in the **Organization Website** field. This field is optional and not required.
15. | Under the **Bidder Contact Information**, enter the following information:
   - **Name**
   - **Telephone**
   - **Email**

**Note:** The contact listed should be the person/people within the organization who can be contacted with questions about the bid response.
16. | Click the **Site/Project Address** link.

### Bid Response address fields

<table>
<thead>
<tr>
<th>Site/Project Address</th>
<th>Address Line 1: 10 Testa Lane</th>
<th>Address Line 2</th>
<th>City</th>
<th>Postal Code: 12222</th>
<th>State: NY</th>
</tr>
</thead>
</table>

**Step** | **Action**
--- | ---
17. | Enter **Address Details**, including the following information:
   - **Address Line 1**
   - **Address Line 2** (if applicable)
### SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td>When you have finished entering address details, click the OK button.</td>
</tr>
</tbody>
</table>

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

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

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

The bid is not complete. (18068,342)

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

![OK button highlighted]

Step | Action
--- | ---
21. | In the resulting popup, click the **OK** button to save your progress.
Step 22. Scroll to the bottom of the page. Under the Lines section, click the numerical value link under the Period column to access budget and work plan information.

Step 23. Click the Budget properties link.
Step | Action
---|---
24. | Review the **Budget Header Information**.
25. | Review **Budget Category Property** section (including Narrative), noting which rows have **Available in Grant** checked.

**Note:** This section was completed by the agency to help the grantee understand which Budget Category(s) require a response. Grantees will need to scroll down to view the sections they are responsible for updating.
Step | Action
--- | ---
26. | Under the **Period Budget Summary** section, click on **View All** icon to show all budget categories. You may need to click the **scrollbar** to view this section of the page.

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

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

   
   **Note:** Where the icon cannot be clicked, the agency has not checked the **Available in Grant** checkbox above.
Step | Action
--- | ---
28. | Enter the applicable value into the **Grant Funds** field.  
   In this example, we will enter **10,000** into the **Grant Funds** field.
29. | Enter the applicable value into the **Match Funds** field.  
   In this example, we will leave this field blank.
30. | Enter the applicable value into the **Other Funds** field.  
   **Note:** This field may be greyed out if it was not selected on the bid event; if greyed out, move onto the next step.
31. | Enter the applicable value into the **Position Title** field.  
   In this example, we will enter **Narcan Trainer** in the **Position Title** field. You may need to scroll to see this field.
32. | Enter the applicable value into the **Annualized Salary per Position** field.
### In this example, we will enter 50,000 in the **Annualized Salary per Position** field.

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

47. | Click the **Work Plan Properties** link.
### Step 48
Review the **Work Plan Header** information and verify the **Allow Bidder Defined Objectives and Tasks** is selected.

### Note 49
If the **Allow Bidder Defined Objectives & Tasks** box is checked and the Maximum Number of Objectives, Tasks, and Performance Measures have not already been entered, then you can add new objective, tasks, and performance measures if needed.

### Step 50
Enter the applicable value into the **Project Summary** field if not already entered by the agency.

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

### Step 51
In this example, we will add additional rows in the **Objectives >> Tasks >> Performance Measures** section. **Note:** The First Objective with the underlying Task and Performance Measure in the list was entered by the agency.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>52.</td>
<td>Click on the <strong>Objective</strong> row to add additional objectives.</td>
</tr>
<tr>
<td>53.</td>
<td>Click the + <strong>Objective</strong> button.</td>
</tr>
</tbody>
</table>
| 54.  | Enter the applicable information on the **Objective** row, in the **Name** field.  
On the **Objective** row, in this example we will enter *Increase the number of opioid related resources available to community members* in the **Name** field.  
On the **Objective** row, in this example we will enter *Increase the number of opioid related resources available to community members* in the **Description** field. |
| 55.  | Select the **Objective** row where the task will be added. |
| 56.  | Click + **Task** button. |
| 57.  | Enter the applicable information on the **Task** row, in the **Name** field.  
On the **Task** row, in this example we will enter *Distribute 72 narcan kits to trained community members* in the **Name** field.  
On the **Task** row, in this example we will enter *Distribute 72 narcan kits to trained community members* in the **Description** field. |
### SFS Handbook: Grantee Processing in SFS

#### Step | Action
--- | ---
59. | Select the **Task** row where the performance measure will be added.
60. | Click **+ Performance Measure** button.
61. | Enter the applicable information on the **Performance Measure** row, in the **Name** field.
   
   On **Performance Measure** row, in this example we will enter **Number of kits distributed** in the **Name** field.
62. | Enter the applicable information on the **Performance Measure** row, in the **Description** field.
   
   On **Performance Measure** row, in this example we will enter **Number of kits distributed** in the **Description** field.
Step | Action
--- | ---
63. | Click the arrow to the right of the More Details tab to expand the view and see all fields.

Note: Available Performance Measure options are:
- Attachment
- Date
- Numeric
- Text/Comment
### SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>65.</td>
<td>Enter the applicable value into the <strong>Numeric (Target/Goal)</strong> field. In this example, we will enter <strong>100</strong> in the <strong>Numeric (Target/Goal)</strong> field.</td>
</tr>
<tr>
<td>66.</td>
<td>Click the <strong>Save</strong> button.</td>
</tr>
<tr>
<td>67.</td>
<td>Click the <strong>Back</strong> button.</td>
</tr>
</tbody>
</table>

**Step 68.** Click the **Return to Bid Response** link.
### 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.
## Step 1

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

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

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

## Step 2

Click the **Bid Event Search** tile.
3. Enter the applicable search criteria in the **Search Criteria** fields.

   In this example, select the **Search by Status** field drop-down list and click **Available** from the list.

4. Click the **Search** button.

5. **Note**: A list of Event IDs will populate based on the search criteria entered.

   Click an **Event ID** link to initiate a bid response.

   In this example, we will click the Bid Event **EVT0000082** link to initiate a bid response.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.</td>
<td>Click the <strong>Bid on Event</strong> button.</td>
</tr>
</tbody>
</table>

**Bid on Event**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Review the <strong>Event Start</strong>, <strong>Event End Date</strong>, <strong>Estimated Award Date</strong>, <strong>Anticipated Contract Date</strong> fields.</td>
</tr>
</tbody>
</table>
**Step** | **Action**
--- | ---
8. | Click the **Additional Bid Info** link.

### Additional Bid Response fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Type</td>
<td>Not-for-Profit</td>
</tr>
<tr>
<td>Taxpayer Identification Number</td>
<td>161057376</td>
</tr>
<tr>
<td>Questions &amp; Answers Type</td>
<td>Provide a Link</td>
</tr>
<tr>
<td>Questions and Answers Upload</td>
<td>Questions and Answers Link</td>
</tr>
<tr>
<td>Questions and Answers Narrative</td>
<td>Q&amp;A</td>
</tr>
</tbody>
</table>

### Step 9:

9. Review the **Additional Bid Info**.

Click the **OK** button to return to the **Event Details** page.

### Step 2: Enter Line Bid Responses

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

<table>
<thead>
<tr>
<th>Line</th>
<th>Period</th>
<th>Item ID</th>
<th>Description</th>
<th>Unit</th>
<th>Your Unit Bid Price</th>
<th>No Bid</th>
<th>Your Total Bid Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>N1E1</td>
<td>LINE 1</td>
<td>EA</td>
<td>0</td>
<td></td>
<td>0.000 USD</td>
</tr>
</tbody>
</table>

**Event Comments and Attachments**

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

- [Submit Bid]
- [Save for Later]
- [Validate Entries]
## SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>Select the <strong>Events Comments and Attachments</strong> link, located at the bottom of the page, to view any instructions, attachments and/or comments. You may need to scroll to see this link.</td>
</tr>
<tr>
<td>11.</td>
<td>Click the <strong>OK</strong> button after viewing the instructions, attachments and comments.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>12.</td>
<td>Use the scrollbar to navigate to the <strong>Step 1: Answer General Event Questions</strong> section.</td>
</tr>
<tr>
<td>13.</td>
<td>If applicable, enter a <strong>DUNS Number</strong> in the <strong>DUNS Number</strong> field. This field is optional and not required.</td>
</tr>
<tr>
<td>14.</td>
<td>If applicable, enter your <strong>Organization Website</strong> in the <strong>Organization Website</strong> field. This field is optional and not required.</td>
</tr>
</tbody>
</table>
| 15.  | Under the **Bidder Contact Information**, enter the following information:  
  - **Name**  
  - **Telephone**  
  - **Email**  
  
  **Note:** The contact listed should be the person/people within the NFP who can be contacted with questions about the bid response |
| 16.  | Click the **Site/Project Address** link. |
Step | Action
--- | ---
17. | Enter **Address Details**, including the following information:
   - **Address Line 1**
   - **Address Line 2** (if applicable)
   - **City**
   - **Postal Code**
   - **State**
   
   **Note:** The **Site/Project Address** is where the grant will be used, or funds will be spent.

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

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

20. **Click the Save for Later button.**
### Step 21.
In the resulting popup, click the **OK** button to save your progress.

### Step 22.
**Scroll** to the bottom of the page. Under the **Lines** section, click the **numerical value** link under the **Period** column to access budget and work plan information.
## Step 23
Click the **Budget properties** link.

## Budget Properties Header

<table>
<thead>
<tr>
<th>Event ID</th>
<th>EVT01000062</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bid Event Period</td>
<td>1</td>
</tr>
<tr>
<td>Bidder/Vendor ID</td>
<td>1000012777</td>
</tr>
<tr>
<td>Max Award Amount</td>
<td>500000.00</td>
</tr>
<tr>
<td>Period From Date</td>
<td>10/1/2023</td>
</tr>
<tr>
<td>Period To Date</td>
<td>08/30/2024</td>
</tr>
<tr>
<td>Budget Type</td>
<td>PERFORMANCE</td>
</tr>
</tbody>
</table>

## 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

<table>
<thead>
<tr>
<th>Budget Category</th>
<th>Available in Grant</th>
<th>Use Match</th>
<th>Match Percentage</th>
<th>Use Other</th>
<th>Overage on Claims</th>
<th>Overage Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Category</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Narrative**

## Step 24
Review the **Budget Header Information**. This section was completed by the agency.

## Step 25
Review **Budget Category Property** section (including Narrative), noting which rows have **Available in Grant** checked.

**Note:** This section was completed by the agency to help the grantee understand which Budget Category(s) require a response.
Step 26. Under **Budget Category Property** section, click **Plus Sign (+)** to add a new row.
### Step 27. Action
Enter the applicable deliverable or outcome into the Budget Category field.

### Step 28. Action
Click the Available in Grant checkbox so the budget category details can be entered for the category.

### Step 29. Note:
- When the Use Match checkbox is selected, the Match Funds field is available for entry on the Category Details page for the budget category.
- When the Use Other checkbox is selected, the Other Funds fields is available for entry on the Category Details page for the budget category.

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

### Step 30. Action
Scroll down to the Period Budget Summary section and click on the Category Details icon for the first budget category.
Step | Action |
--- | --- |
31. | Leave the **Type/Description** field blank. |
32. | Enter the applicable value into the **Grant Funds** field.  
**Note:** This field may be greyed out if it was not selected on the bid event; if greyed out, move onto next step. |
33. | Enter the applicable value into the **Match Funds** field.  
**Note:** This field may be greyed out if it was not selected on the bid event; if greyed out, move on to the next step. |
34. | Enter the applicable value into the **Other Funds** field.  
**Note:** This field may be greyed out if it was not selected on the bid event; if greyed out, move on to the next step. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
</table>
| 35.  | Enter the applicable value into the **Narrative** field. **Note:** The narrative could be additional information for the agency or could be used to summarize the changes you made.  
   In this example, we will leave this field blank. |
| 36.  | Click the **OK** button. |
| 37.  | Under the Period Budget Summary section, click on **Category Details** icon for the second budget category. |
| 38.  | Leave the **Type/Description** field blank. |
| 39.  | Enter the applicable value into the **Grant Funds** field.  
   In this example, enter **10,000** in the **Grant Funds** field. |
| 40.  | Enter the applicable value into the **Match Funds** field.  
   **Note:** This field may be greyed out if it was not selected on the bid event; if greyed out, move onto next step. |
| 41.  | Enter the applicable value into the **Other Funds** field.  
   **Note:** This field may be greyed out if it was not selected on the bid event; if greyed out, move onto next step. |
| 42.  | Enter the applicable value into the **Narrative** field. **Note:** The narrative could be additional information for the agency or could be used to summarize the changes you made.  
   In this example, we will leave this field blank. |
| 43.  | Click the **OK** button. |
44. Click the **Save** button.

45. Click the **Back** button.

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

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

### Step 49
Enter the applicable value into the **Project Summary** field.

### Step 50
In this example, we will add additional rows in the **Objectives >> Tasks >> Performance Measures** section. **Note**: The First Objective with the underlying Task and Performance Measure in the list was entered by the agency.

Click on the **Objective** row to add additional objectives.

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

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

### Step 53
On the **Objective** row, enter the applicable value in the **Description** field.
### Step 54
Select the **Objective** row where the task will be added.

### Step 55
Click **+ Task** button.

### Step 56
On the **Task** row, enter the applicable value in the **Name** field.

### Step 57
On the **Task** row, enter the applicable value in the **Description** field.

### Step 58
Select the **Task** row where the performance measure will be added.

### Step 59
Click **+ Performance Measure** button.

### Step 60
On **Performance Measure** row, enter the applicable value in the **Name** field.
Step | Action
---|---
61. | On **Performance Measure** row, enter the applicable value in the **Description** field.

![Image of SFS Handbook: Grantee Processing in SFS]

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

![Image of SFS Handbook: Grantee Processing in SFS]

63. | **Note**: Available Performance Measure options are:
- Attachment
- Date

![Image of SFS Handbook: Grantee Processing in SFS]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>64.</td>
<td>Enter the applicable value into the <strong>Numeric (Target/Goal)</strong> field.</td>
</tr>
<tr>
<td></td>
<td>In this example, we will enter <strong>100</strong> in the <strong>Numeric (Target/Goal)</strong> field.</td>
</tr>
<tr>
<td>65.</td>
<td>Click the <strong>Save</strong> button.</td>
</tr>
<tr>
<td>66.</td>
<td>Click the <strong>Back</strong> button.</td>
</tr>
</tbody>
</table>

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

67.  Click the **Return to Bid Response** link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>68.</td>
<td><strong>Note:</strong> The amount entered in the <strong>Your Unit Bid Price</strong> 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 <strong>20,000</strong> in the <strong>Your Unit Bid Price</strong> field.</td>
</tr>
<tr>
<td>69.</td>
<td>When you are ready to submit your bid response, click the <strong>Submit Bid</strong> button.</td>
</tr>
</tbody>
</table>

Are you done making changes and would like to post this bid? (18059:398)
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".

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

**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.
## Step 1

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

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

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

## Step 2

Click the **Bid Event Search** tile.
### Step 3
Enter the applicable search criteria in the **Search Criteria** fields.

In this example, we will select the **Search by Status** field drop-down list and click **Available** from the list.

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

### Step 5
Click an **Event ID** link to initiate a bid response.
### SFS Handbook: Grantee Processing in SFS

#### Step 6
- **Action:** Click the **Bid on Event** button.
  - ![Bid on Event Button](image)

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

#### Step 8
- **Action:** Click the **Additional Bid Info** link.

#### Additional Bid Response fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Type</td>
<td>Not-For-Profit</td>
</tr>
<tr>
<td>Taxpayer Identification Number</td>
<td>16107370</td>
</tr>
<tr>
<td>Bidders Conference Application Workshop</td>
<td></td>
</tr>
<tr>
<td>Contract Type</td>
<td>Fixed</td>
</tr>
<tr>
<td>Length</td>
<td>N/A</td>
</tr>
<tr>
<td>Narrative</td>
<td>Q&amp;A</td>
</tr>
</tbody>
</table>

#### Step 9
- **Action:** Review the **Additional Bid Info**.
- **Action:** Click the **OK** button to return to the **Event Details** page.
### Step 2: Enter Line Bid Responses

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

<table>
<thead>
<tr>
<th>Lines in This Event</th>
<th>Lines Responded To</th>
<th>Your Total Line Pricing</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>0</td>
<td>0.000 USD</td>
</tr>
</tbody>
</table>

#### Hide Line Detail

#### Bid Required

- [ ] Line Comments/Files

### Lines

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

#### Event Comments and Attachments

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

- Submit Bid
- Save For Later
- Validate Entries

### Return to Event Search

---

<table>
<thead>
<tr>
<th><strong>Step</strong></th>
<th><strong>Action</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td><strong>Select the Events Comments and Attachments link, located at the bottom of the page, to view any instructions, attachments and/or comments. You may need to scroll to see this link.</strong></td>
</tr>
</tbody>
</table>
Click the OK button after viewing the instructions, attachments, and comments.
Step | Action |
--- | --- |
12. | Use the scrollbar to navigate to the **Step 1: Answer General Event Questions** section. |
13. | If applicable, enter a **DUNS Number** in the **DUNS Number** field. This field is optional and not required. |
14. | If applicable, enter your **Organization Website** in the **Organization Website** field. This field is optional and not required. |
15. | Under the **Bidder Contact Information**, enter the following information:  
   - Name  
   - Telephone  
   - Email  
   
   **Note**: The contact listed should be the person/people within the NFP who can be contacted with questions about the bid response. |
16. | Click the **Site/Project Address** link. |

### Bid Response address fields

<table>
<thead>
<tr>
<th>Site/Project Address</th>
<th>+</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th>View All</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Address Line 1</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Address Line 2</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>City</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Postal Code</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>State</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

17. | Enter **Address Details**, including the following information:  
   - **Address Line 1** |
### Step 18
When you have finished entering address details, click the **OK** button.

### Step 19
Review and respond to **Event Questions**. Those that are flagged as Required (*) must be responded to in order to submit a bid response.

**Note:** The ability to add a Comment/Attachment will vary based on the question.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>20.</td>
<td>Click the <strong>Save for Later</strong> button.</td>
</tr>
</tbody>
</table>

The bid is not complete. (18068,342)

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

[Button: OK] [Button: Cancel]

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>21.</td>
<td>In the resulting popup, click the <strong>OK</strong> button to save your progress.</td>
</tr>
</tbody>
</table>
22. **Scroll** to the bottom of the page. Under the **Lines** section, click the **numerical value** link under the **Period** column to access budget and work plan information.

23. **Click the Budget properties link.**
Step | Action
--- | ---
24. | Review the **Budget Header Information**. This section was completed by the agency.
25. | Review **Budget Category Property** section (including Narrative), noting which rows have **Available in Grant** checked.

**Note:** This section was completed by the agency to help the grantee understand which Budget Category(s) require a response. Grantees will need to scroll down to view the sections they are responsible for updating.
26. Under the **Period Budget Summary** section, click on **View All** icon to show all budget categories.

In this example, we will enter budget information for the **Scoping & Pre-development** and **Design** budget categories.

27. Under the **Period Budget Summary** section, click on **Category Details** icon for the **Scoping & Pre-development** budget category.

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

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

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

36. Enter the applicable value into the **Grant Funds** field.
   
   In this example, we will enter **10,000** in the **Grant Funds** field.

37. Enter the applicable value into the **Match Funds** field.
   
   In this example, we will leave this field blank.

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

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

39. Enter the applicable value into the **Narrative** field. **Note:** The narrative could be additional information for the agency or could be used to summarize the changes you made.
   
   In this example, we will leave this field blank.

40. Click the **OK** button.
Step | Action
---|---
41. | Click the **Save** button.
42. | Click the **Back** button.

Step | Action
---|---
43. | Click the **Work Plan Properties** link.
### Step 44
Review the Work Plan Header information and verify the Allow Bidder Defined Objectives and Tasks is selected.

### Step 45
Note: If the Allow Bidder Defined Objectives & Tasks box is checked and the Maximum Number of Objectives, Tasks, and Performance Measures have not already been entered, then you can add new objective, tasks, and performance measures if needed.

### Step 46
Enter the applicable value into the Project Summary field.

### Step 47
In this example, we will add additional rows in the Objectives >> Tasks >> Performance Measures section. Note: The First Objective with the underlying Task and Performance Measure in the list was entered by the agency.

Click on the Objective row to add additional objectives.

### Step 48
Click the + Objective button.

### Step 49
On the Objective row, enter the applicable value in the Name field.

### Step 50
On the Objective row, enter the applicable value in the Description field.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>51.</td>
<td>Select the <strong>Objective</strong> row where the task will be added.</td>
</tr>
<tr>
<td>52.</td>
<td>Click <strong>+ Task</strong> button.</td>
</tr>
<tr>
<td>53.</td>
<td>On the <strong>Task</strong> row, enter the applicable value in the <strong>Name</strong> field.</td>
</tr>
<tr>
<td>54.</td>
<td>On the <strong>Task</strong> row, enter the applicable value in the <strong>Description</strong> field.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>55.</td>
<td>Select the <strong>Task</strong> row where the performance measure will be added.</td>
</tr>
<tr>
<td>56.</td>
<td>Click <strong>+ Performance Measure</strong> button.</td>
</tr>
<tr>
<td>57.</td>
<td>On <strong>Performance Measure</strong> row, enter the applicable value in the <strong>Name</strong> field.</td>
</tr>
</tbody>
</table>
### Step 58.
On Performance Measure row, enter the applicable value in the Description field.

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

### Step 60.
**Note:** Available Performance Measure options are:
- Attachment
- Date
In this example, on the Performance Measure row, we will select the Performance Measure Response Type drop-down list and select the Numeric option.

61. Enter the applicable value into the Numeric (Target/Goal) field.
   In this example, we will enter 100 in the Numeric (Target/Goal) field.

62. Click the Save button.

63. Click the Back button.

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

---

**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.
### Step 1

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

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

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

### Step 2

Click the **Bid Event Search** tile.
3. Enter the applicable search criteria in the **Search Criteria** fields.

   In this example, select the **Search by Status** field drop-down list and click **Available** from the list.

4. Click the **Search** button.

5. Click an **Event ID** link to update an in-process bid response.

   In this example, we will click the Bid Event **EVT0000082** link to update a bid response.
Step | Action
--- | ---
6. | Click on **My Bids In Process** link to view your in-process response to this bid event.

Step | Action
--- | ---
7. | Click the **View/Edit** link for the applicable bid response you want to view and update.
Step | Action
---|---
8. | Scroll to the bottom of the page of the existing bid response. Under the **Lines** section, click the **numerical value** link under the **Period** column to access budget and work plan information for this bid response.

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

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

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

### Reviewing and Approving Grant Contracts

**Lesson Description:**

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

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

**Lesson Objectives:**

In this lesson, you will learn how to:

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

**Preview a Contract Agreement**

**Topic Description:**

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | **Preferred Navigation**: Click the **Grant Management** tile.  
**Alternative Navigation**: From the **NavBar** navigate to: Menu > Manage Contracts > Maintain Contract Documents  
**Note**: You must log in to the SFS Vendor Portal to view a grant contract. |
2. Click the **Grant Contracts Search** tile.

3. Enter the agency's business unit into the **Business Unit** field or click the magnifying glass to search for the information.

   If you are unsure of the business unit for the State Agency you are doing business with, click the **magnifying glass** to view a list of business units and state agencies.

4. Verify the **Pending Review** checkbox is selected.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>6.</td>
<td>Click the applicable <strong>Contract ID</strong> from the search results.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
7. | Click the **View Document** button to review the Contract Agreement document.
Step | Action
--- | ---
8. | When you are finished reviewing the Contract Agreement document, click the **Close (X)** button.
9. | You have successfully completed the **Preview Contract Agreement** topic.

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

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

**Topic Objectives:**
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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | **Preferred Navigation:** Click the **Grant Management** tile.  
**Alternative Navigation:** From the **NavBar** navigate to: Menu > Manage Contracts > Maintain Contract Documents  
**Note:** You must log in to the SFS Vendor Portal to update grant contract information. |
Step | Action
--- | ---
2. | Click the **Grant Contracts Search** tile.

3. | Enter the agency's business unit into the **Business Unit** field or click the magnifying glass to search for the information.

If you are unsure of the business unit for the State Agency you are doing business with, click the **magnifying glass** to view a list of business units and state agencies.

4. | Verify the **Pending Review** checkbox is selected.

5. | Click the **Search** button.
Step 6. Click the applicable **Contract ID** link from the search results under the **Contract Document** column.
Step | Action
--- | ---
7. | Click the **View Document** button to review the Contract Agreement document if you want to view this information. You may need to scroll to see this button. **Note**: This is an optional step.

![View Document button](image)

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

**Note:** When the **Available for Supplier Updates** option is selected, the grantee can update the budget information. When de-selected, the grantee can only view the budget information.
Step 12. Click the Category Details icon, located at the bottom of the page, associated to the budget category to update the budget category detail information. You may need to scroll to see these icons.

Note: The Category Detail fields will vary based on the Budget Category.
Step | Action
---|---
13. | In this example, we are updating budget category detail information for the **Fringe** budget category and **Expenditure** budget type.

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

In this example, we are increasing the **Grant Funds** amount for the **Fringe** budget category, so the total grant funds requested for all the budget categories equals the period amount.

15. | The **Narrative** field should be used to provide additional details about the information entered for a specific budget category.

In this example, we will enter **Increased the grant funds amount so total grant funds requested equals the period amount** in the **Narrative** field.

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

17. | When you are finished entering the **Budget Category Detail** information, click the **OK** button.
Step | Action
---|---
18. | Click the **Apply** button to save your changes.
19. | Click the **OK** button to return to the **Document Management** page.
20. Click the applicable **Period** link under the **Work Plan Period** heading to review and edit the work plan information.

**Work Plan Period**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>21.</td>
<td><strong>Note</strong>: When the Available for Supplier Updates option is selected, the vendor can update the work plan information. When de-selected, the vendor can only view the work plan information.</td>
</tr>
<tr>
<td>22.</td>
<td>If the Allow Supplier Defined Objectives &amp; Tasks box located at the top of the page is checked and the Maximum Number of Objectives, Tasks, and Performance Measures have not already been entered, then you can add new objective, tasks, and performance measures if needed. Select the checkbox for the Objective, Task, and/or Performance Measure where the new objective, task, and/or performance measure will be inserted and then select the + Objective button to add a new objective. Select the + Task button to add a new task and select the + Perf Measure button to add a new performance measure. An objective must be inserted before a task can be inserted and a task must be inserted before a performance measure can be inserted.</td>
</tr>
<tr>
<td>23.</td>
<td>Click the Work Plan Overview Report link to view the work plan information in a PDF format, if you are interested in viewing this information. <strong>Note</strong>: This is an optional step.</td>
</tr>
<tr>
<td>24.</td>
<td>When you are finished reviewing the Work Plan Overview Report document, click the Close (X) button.</td>
</tr>
</tbody>
</table>
### SFS Handbook: Grantee Processing in SFS

**Step** | **Action**
--- | ---
25. | Click the **More Details** tab.

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

27. | Click the **Apply** button to save any changes.

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

---

**Mark as Reviewed checked (30001,1114)**

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

---

**Step** | **Action**
--- | ---
33. | Click the **Yes** button to continue marking this contract as reviewed.
   **Note:** Click the **No** button to cancel this action.
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.
### Step 1

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

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

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

### Step 2

Click the **Grant Contracts Search** tile.
### Maintain Contract Documents

**Document Search**

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>Magnifying Glass</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Advanced Search Criteria**

- **Pending Review**
- **Search**

### List of Documents

<table>
<thead>
<tr>
<th>Contract Document</th>
<th>Description</th>
<th>Document Status</th>
<th>Status Date/Time</th>
</tr>
</thead>
</table>

#### Step-by-Step Instructions

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

If you are unsure of the business unit for the State Agency you are doing business with, click the **magnifying glass** to view a list of business units and state agencies.  

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>Verify the <strong>Pending Review</strong> checkbox is selected.</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
</tbody>
</table>
6. Click the applicable **Contract ID** from the search results.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Click the <strong>View Contract Agreement</strong> button to view the Contract Agreement in a new browser window.</td>
</tr>
</tbody>
</table>

| 8.   | **Note:** If you do not see this popup, it may be blocked by your browser. Please click the blocked popup icon in the address bar, select the option to “Always allow pop-ups and redirects from [https://esupplier.sfs.ny.gov/psp/fscm/SUPPLIER/?cmd=login](https://esupplier.sfs.ny.gov/psp/fscm/SUPPLIER/?cmd=login)” and click the **Done** button. Following this, click the **View Contract Agreement** button again to view the new browser window. |
9. When you are finished reviewing the Contract Agreement document, click the **Close (X)** button.
Step | Action
---|---
10. | Click the **Approve** button.
The Title page appears. Enter the Title you wish to display in the signature block within the agreement. This should be your official title at your organization (e.g., President).

**Note:** Once you enter a title the first time, the title you entered the previous time will be displayed by default the next time you sign an agreement in SFS. If your title has changed, then update the value.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.</td>
<td>The <strong>Title</strong> 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). <strong>Note:</strong> 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.</td>
</tr>
<tr>
<td>12.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>
### Step 13
Click the **View Contract Agreement** button.

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

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

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>15.</td>
<td>Click the <strong>Close (X)</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>16.</td>
<td>Click the <strong>Document</strong> button or the <strong>Home</strong> Button, to navigate away from the Maintain Contract Documents page.</td>
</tr>
<tr>
<td>17.</td>
<td>You have successfully completed the <strong>Apply an Electronic Signature to a Contract Agreement</strong> topic.</td>
</tr>
</tbody>
</table>

**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
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.

**Disclaimer:**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.</strong></td>
<td><strong>Preferred Navigation:</strong> Click the <strong>Grant Management</strong> tile. <strong>Alternative Navigation:</strong> From the <strong>NavBar</strong> navigate to: Menu &gt; Manage Contracts &gt; Manage Progress Reports <strong>Note:</strong> You must log in to the SFS Vendor Portal to submit a progress report.</td>
</tr>
<tr>
<td><strong>2.</strong></td>
<td>Click the <strong>Progress Report Search</strong> tile.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
3. | The **Manage Progress Reports** search page is displayed with a default list of All Progress Reports available.
4. | Select the **status tab** on the left to display progress reports for an applicable view.
   
   Click the **Not Started** tab.
5. | Click the Filter icon to narrow down the number of progress reports that display.
Step | Action
--- | ---
6. | Enter the applicable values in the **Search Criteria** fields or click the **magnifying glass** icon to search for the information.

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

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

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

- Select the applicable progress report.
- Click the **Re-Assign User** button at the top of the page.
- Select the User ID to re-assign.
- Click the **Assign Supplier User** button.

**Note:** This is an optional step.
Step 9. Select the applicable Report Description link to update and submit the progress report.

Period 1 - Report
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 10. | **Note**: There are five Performance Measure Response Types that could be included on a progress report. They are as follows:  
- Attachment  
- Text/Comment  
- Numeric  
- Date  
- Yes/No  
In this example, the Text/Comment response type is used on the progress report. |
| 11. | **Note**: The View Text/Comment button will only display for the Text/Comment response type. To view any comments on the Target/Goal, click the View Text/Comment button. |
| 12. | **OK** button to return to the previous page. |
Step 13. Click the **Enter Text/Comment** response button.

**Note:** The **Enter Text/Comment** button will only display for the Text/Comment response type.
Step | Action
--- | ---
14. | Enter the applicable value in the **Contract Progress Comments** box. **Note**: The **Contract Progress Comments** field could be used to explain your progress in completing the associated task.

15. | Click the **OK** button.

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

17. | Click the **Submit for Review** button.
Step 18. Click the Yes button to continue sending the progress report to the agency for review and approval.

Note: Click the No button to cancel this action which allows you to return to the progress report to make additional edits prior to submitting to the agency.


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

2. | Click the Progress Report Search tile.
### Step 3
The **Manage Progress Reports** search page is displayed with a default list of All Progress Reports available.

### Step 4
Select the **status tab** on the left to display progress reports for an applicable view.

Click the **Information Requested** tab.

### Step 5
Select the applicable **Report Description link** to update and submit the progress report.

- **Period 1 - Report**

![Manage Progress Reports](image)

**Update Progress Report**

<table>
<thead>
<tr>
<th>Objective Number</th>
<th>Objective Name</th>
<th>Task Number</th>
<th>Task Name</th>
<th>Performance Measure Number</th>
<th>Performance Measure Name</th>
<th>Response Type</th>
<th>Integer (Target/Goal)</th>
<th>Integer Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>perf measure 1 name</td>
<td>1.1.1</td>
<td>perf measure 1 name</td>
<td>1.1.1</td>
<td>perf measure 1 name</td>
<td>Numeric</td>
<td>500</td>
<td>500</td>
</tr>
</tbody>
</table>

**Send Comment to Agency**

- **Save**
- **Resubmit for Review**
- **Cancel**

### Step 6
Click the **View Approvals** link to view the agencies comment(s) on what they want updated on the progress report.
Step | Action
--- | ---
7. | Expand the **Comments** section to view the comments from the agency.
8. | Click the **Close (X)** icon in the upper right corner of the page to close the **Contract Progress Report Approval** page.

9. | Update the progress report as needed.
   Enter a comment for the agency in the **Send Comment to Agency** field.
Step | Action
--- | ---
10. | Click the **Resubmit for Review** button.

---

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

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

[Yes] [No]

---

Step | Action
--- | ---
11. | Click the **Yes** button to continue sending the progress report back to the agency for review and approval.  
**Note:** Click the **No** button to cancel this action which allows you to return to the progress report to make additional edits prior to submitting to the agency.

12. | You have successfully completed the **Update and Re-submit a Returned Progress Report** topic.

---

**Entering and Maintaining Grant Claims**

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

Claims in SFS can include multiple claim lines – so a claim could include both an advance for one period and a reimbursement for another period.
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 1
**Navigation:** Click the **Grants Management** tile.

**Alternative Navigation:** From the **NavBar** navigate to: Menu > eSettlements > Submit a Claim.

**Note:** You must log in to the SFS Vendor Portal to enter a claim.

#### Step 2
Click the **Submit a Claim** tile.

#### Step 3
Click on the Claim Submission **Start** button.
### Step 4
A listing of the first five available contracts display. To view more than five contracts, click the **View All** link.

### Step 5
Click the **check box** to select the applicable contract.

### Step 6
Click the **Next** button on the top right-hand corner of the page.

### Step 7
Verify contract details on the **Claim Header** page.

### Step 8
**Vendor Location** values can be selected using the **Supplier Location** magnifying glass icon if needed.

**Note:** Vendor Location is a default set of rules, or attributes, that define how an agency conducts business with a particular grantee. A vendor location comprises information such as payment terms, payment options, pay to bank accounts, etc. Although a vendor location is not an address, it does reference addresses.

### Step 9
**Note:** Change the **Claim Date** using the calendar icon if needed. Claim date defaults to the current date.
### SFS Handbook: Grantee Processing in SFS

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>Enter a unique <strong>Invoice ID</strong> up to 30 characters in the <strong>Invoice ID</strong> field.</td>
</tr>
<tr>
<td>11.</td>
<td>Click the <strong>Save</strong> button.</td>
</tr>
<tr>
<td>12.</td>
<td>Click the <strong>Next</strong> button on the top right corner of the page.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>13.</td>
<td>Choose a <strong>Contract Period</strong> by clicking on the magnifying glass next to the field.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: You would select the available contract period based on the payment schedule and due date listed on the contract.</td>
</tr>
<tr>
<td>14.</td>
<td><strong>Note</strong>: <strong>Contract Period</strong> 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.</td>
</tr>
<tr>
<td>15.</td>
<td><strong>Note</strong>: The <strong>Line Type</strong> 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.</td>
</tr>
<tr>
<td></td>
<td>In this example, click the <strong>Line Type</strong> dropdown menu and select the <strong>Initial</strong> line type.</td>
</tr>
<tr>
<td>16.</td>
<td>Click the <strong>Save</strong> button.</td>
</tr>
<tr>
<td>17.</td>
<td>Click the <strong>Next</strong> button.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
18. | Validate the **Claim Line Details** information and verify the Line type is **Initial**.
19. | Click the **Line Comments** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 20.  | Enter the applicable value in the **Comment** field.  
**Note**: Line comments are used to add any additional information pertaining to the line for the agency reviewers to view. |
| 21.  | Click the **OK** button. |
| 22.  | Click the **Line Attachments** button. |
| 23.  | Click the **Add Attachment** button. |

![Image of Claims Attachments](image1)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>24.</td>
<td>Click the <strong>Choose File</strong> button, select your <strong>pdf</strong> file, and click the <strong>Open</strong> button.</td>
</tr>
<tr>
<td>25.</td>
<td>Click the <strong>Upload</strong> button.</td>
</tr>
</tbody>
</table>

![Image of File Attachment](image2)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>26.</td>
<td>Enter a description of the document into the <strong>Description</strong> field.</td>
</tr>
<tr>
<td>27.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
28. | Enter the applicable value into the **Initial Amount Requested** field.

In this example, we will enter **100** into the **Initial Amount Requested** field.

29. | Enter the applicable justification into the **Initial Request Justification** field.

30. | **Click** the **Save** button.

31. | **Click** the **Next** button.
SFS Handbook: Grantee Processing in SFS

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

Enter a New Claim - Reimbursement Amount

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

**Topic Objective:**  
In this topic, you will learn:  
- How to submit a claim for a reimbursement payment

**Procedure:**

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

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

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

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

### Claim Entry and Submission

- **Contract Selection**
- **Claim Header**
  - Business Unit: OMH01
  - Claim Number: NEXT
- **Supplier Location**: PEACE FOCUS ACTION AND COMMUNITY
  - Supplier Location: WARSAW
  - Vendor Location: SYRACUSE NY
- **Invoice ID**: A12345678
- **Claim Date**: 08/02/2023
- **Claim Type**: Regular

### Step 7
Verify contract details on the **Claim Header** page.

### Step 8
**Vendor Location** values can be selected using the **Supplier Location** magnifying glass icon, if needed.

**Note**: Vendor Location is a default set of rules, or attributes, that define how an agency conducts business with a particular grantee. A vendor location comprises information such as payment terms, payment options, pay to bank accounts, etc. Although a vendor location is not an address, it does reference addresses.

### Step 9
**Note**: Change the **Claim Date** using the calendar icon if needed. Claim date defaults to the current date and should be the date the claim is entered.

### Step 10
Enter a unique **Invoice ID** up to 30 characters in the **Invoice ID** field.

### Step 11
Click the **Save** button.

### Step 12
Click the **Next** button.
13. Select a **Contract Period** by clicking on the magnifying glass next to the field.  
**Note:** You would select the available contract period based on the payment schedule and due date listed on the contract.

14. Click the **Line Type** dropdown menu and select the **Reimbursement** line type.

15. Click the **Save** button.

16. Click the **Next** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 17.  | Validate Claim Line Details information. Line type is **Reimbursement**.  
**Note:** Budget categories and Approved Grant Budget amounts will transfer from the approved grant contract. |
| 18.  | Click the **Line Comments** button. |
### Step 19
Enter the applicable value into the **Comments** field.

**Note:** Line comments are used to add any additional information pertaining to the line for the agency reviewers to view.

### Step 20
Click the **OK** button.

### Step 21
Click the **Line Attachments** button.

### Step 22
Click the **Add Attachment** button.

### Step 23
Click the **Choose File** button, select your **pdf** file, and click the **Open** button.

**Note:** Only .pdf files can be uploaded.

### Step 24
Click the **Upload** button.
Step | Action
--- | ---
25. | Enter a description of the document into the **Description** field.
26. | Click the **OK** button.

---

Step | Action
--- | ---
27. | Enter the applicable dates into the **Cost Incurred Date From** field and the **Cost Incurred Date To** field. You can also use the calendar icons to select the dates.

**Note:** **Cost Incurred Date From** and **Cost Incurred Date To** must be within the period date range.
Step | Action
--- | ---
28. | Enter the expenditure amounts for each budget category into the **Expenditures for this Report** field.

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

29. | Click the **Save** button

30. | Click the **Next** button.

Step | Action
--- | ---
31. | Enter the applicable text into the **Add Claim Header Comment** field.

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

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

33. | Click the **Claim Entry Complete** checkbox.

34. | Click the **Certification** checkbox.

35. | Click the **Save** button

36. | Click the **Submit** button.

37. | Click the **OK** button.

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>38.</td>
<td>You have successfully completed the <strong>Enter a New Claim – Reimbursement Amount</strong> topic.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td><strong>Navigation:</strong> Click the <strong>Grants Management</strong> tile.</td>
</tr>
</tbody>
</table>

**Alternative Navigation:** From the **NavBar** navigate to: Menu > eSettlements > Claims Update Guide.

**Note:** You must log in to the SFS Vendor Portal to update an existing claim.
### Step 2
- Click the **Claims Update Guide** tile.

### Step 3
- Enter the applicable search criteria in the **Search Criteria** fields or click the magnifying glass icon to look up the information.

### Step 4
- Click the **Search** button to display the search results.

### Step 5
- Select the **In Process** menu on the left side of the page to view all in process claims.

### Step 6
- Click the **Claim Number** link associated to the claim you want to update.
Step | Action
--- | ---
7. | Select the applicable section(s) on the left of the page that you need to complete.
    
In this example, we need to enter the cost incurred dates and the expenditure amounts for the **Claim Line Details** section.

8. | After completing the remaining claims information, click the **Claim Summary** section to submit the claim for approval.
Step | Action
--- | ---
9. | Click the **Claim Entry Complete** checkbox.
10. | Click the **Certification** checkbox.
11. | Click the **Save** button
12. | Click the **Submit** button.
13. | Click the **OK** button.
Claim is submitted into agency workflow and the claim Status changes to **Agency Review**.
14. | You have successfully completed the **Update an Existing Claim** topic.

Update a Returned Claim

**Topic Description:**
This topic provides the knowledge and skills to update a claim returned by the agency.
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. | **Navigation**: Click the Grants Management tile.  
**Alternative Navigation**: From the NavBar navigate to: Menu > eSettlements > Claims Update Guide.
### Step 2
Click the **Claims Update Guide** tile.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Claims Update Guide</strong> tile.</td>
</tr>
</tbody>
</table>

### Grants Management

#### Claim Status Drop-Down Menu

<table>
<thead>
<tr>
<th>Field</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Claim Status</td>
<td>Returned</td>
</tr>
</tbody>
</table>

#### Search Criteria Fields

- Business Unit
- Supplier ID
- Supplier Name
- Claim Number
- Claim Date
- Claim Status
- Contract ID
- NYS Contract #
- Invoice ID
- Invoice Date

#### Search and Clear Buttons

- **Search**
- **Clear**

### Step 3
Enter the applicable search criteria in the **Search Criteria** fields or click the magnifying glass icon to look up the information.

### Step 4
Click the **Claim Status** drop-down field and select the **Returned** list item.

### Step 5
Click the **Search** button to display the search results.

### Step 6
Select the **Returned** menu on the left side of the page to view all returned claims.

### Step 7
Click the **Claim Number** link associated to the claim you want to update.
Step | Action
--- | ---
8. | Click the **Claim Summary** menu on the left side of the page.
9. | Click the **View History** link to view the workflow comments associated with the returned claim.

**Claims Comments**

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>OMH01</th>
<th>Claim ID</th>
<th>000000399</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Comments</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Please add documentation</td>
<td>Agency_Rvwr_Appr_1C</td>
<td>10/04/2023 11:23AM</td>
</tr>
</tbody>
</table>

**Step** | **Action**
--- | ---
10. | After reviewing the workflow comment(s) information, click the **OK** button to return to the **Claim Summary** page.
Step | Action
---|---
11. | Make the update(s) requested by the agency.
   
   In this example, we will attach additional documentation, so we will click the **Claim Line Details** tab.

12. | Click the **Line Attachments** button to upload additional documentation.

13. | Click the **Add a New Row (+)** icon to add a new row.
Step | Action
--- | ---
14. | Click the **Add Attachment** button to upload additional documentation.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 15. | Click the **Choose File** button, select your **pdf** file, and click the **Open** button.  
**Note:** Only .pdf files can be uploaded. |
| 16. | Click the **Upload** button. |
17. Enter the document description in the **Description** field.

18. Click the **OK** button.
Step | Action
---|---
19. | Click the **Save** button.
20. | Click the **Claim Summary** menu on the left side of the page.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>21.</td>
<td>Click the <strong>Claim Entry Complete</strong> check box.</td>
</tr>
<tr>
<td>22.</td>
<td>Click the <strong>Certification</strong> checkbox.</td>
</tr>
<tr>
<td>23.</td>
<td>Click the <strong>Save</strong> button.</td>
</tr>
<tr>
<td>24.</td>
<td>Click the <strong>Submit</strong> button.</td>
</tr>
<tr>
<td>25.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>

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

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

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

**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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>From the <strong>NavBar</strong> navigate to: Menu &gt; eSettlements &gt; Claim Inquiry. <strong>Note:</strong> You must log in to the SFS Vendor Portal to view a claim.</td>
</tr>
</tbody>
</table>
### Step 2

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

### Step 3

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

**or**

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

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

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

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

6. Click the Search button.

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

8. On the Claim Details tab, click on the Claim ID link for the desired claim.
9. Click the View Approvals link.
Step | Action
--- | ---
10. | After reviewing the approval workflow, click the **Close (X)** icon.

11. | Click the **Reviewed Amount** button.
**Step** | **Action**
---|---
12. | Click the **Line Comments** button (the number in parenthesis indicates the number of comments).
Step 13. Click the **OK** button when your review of the line comments is complete.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>14.</td>
<td>Click the Attachments button (the number in parenthesis indicates the number of attachments).</td>
</tr>
<tr>
<td>15.</td>
<td>Click the View Attachment button.</td>
</tr>
<tr>
<td>16.</td>
<td>When you are finished reviewing the attachment, click the Close (X) button.</td>
</tr>
</tbody>
</table>
### Step 17

Click the **OK** button to return to the previous page.
Step | Action
--- | ---
18. | Click the **OK** button to return to the previous page.
20. Click the **Workflow Comments** link to view workflow comments for the claim.

21. Click the **Attachments** button to view any header attachments for the claim.

22. Click the **Preview Claim** link to view the pdf version of the claim.

**Note**: Once the claim is approved, the preview claim link will be grayed out and the claim pdf is only accessible as an attachment via the **Attachments** button.

23. You have successfully completed the **Claim Inquiry** topic.
Grantee Reports and Queries

Lesson Description:
This lesson provides the knowledge and skills to process grantee reports and queries.

Lesson Objectives:
In this lesson, you will learn how to:
- Run the Vendor Contract Summary Report

Run the Vendor Contract Summary Report

Topic Description:
This topic provides the knowledge and skills to run the Vendor Contract Summary report. This report provides grant related contract and bid event data at a summary level.

Topic Objectives:
In this topic, you will learn:
- How to run the Vendor Contract Summary report.

Procedure

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

Disclaimer: The data used in this scenario provides a realistic example and was selected for instructional purposes only. The actual data used in the SFS will be driven by the real-life transactional requirements.
Step | Action
--- | ---
1. | From the **NavBar** navigate to: Menu > Manage Contracts > Vendor Contract Summary Report

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

SetID, Business Unit, Bid Event ID, Vendor Type, Vendor ID, Contract ID, NYS Contract Number, Contract Status, Contract Type, Contract Begin Date, Contract Expire Date, Period, Period From Date, and Period To Date.

**Note:**
- SetID defaults to SHARE and doesn’t need to be changed.
- SetID and Business Unit are required fields. Business Unit is the SFS ID for the NYS Agency.

3. | Click the **View Results** button to display the search results based on the entered search criteria.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>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.</td>
</tr>
<tr>
<td>5.</td>
<td><strong>Note</strong>: The results can be downloaded into an Excel Spreadsheet, a CSV Text File, or an XML File by clicking on the appropriate link.</td>
</tr>
<tr>
<td>6.</td>
<td>You have successfully completed the Run the Vendor Contract Summary Report topic.</td>
</tr>
</tbody>
</table>