



Grants Management in the Statewide Financial System (SFS)

Agenda

- Grants Management in SFS Transition
- Grantee Use of SFS
- Preparing for the Transition
- Next Steps

Grants Management in SFS Transition

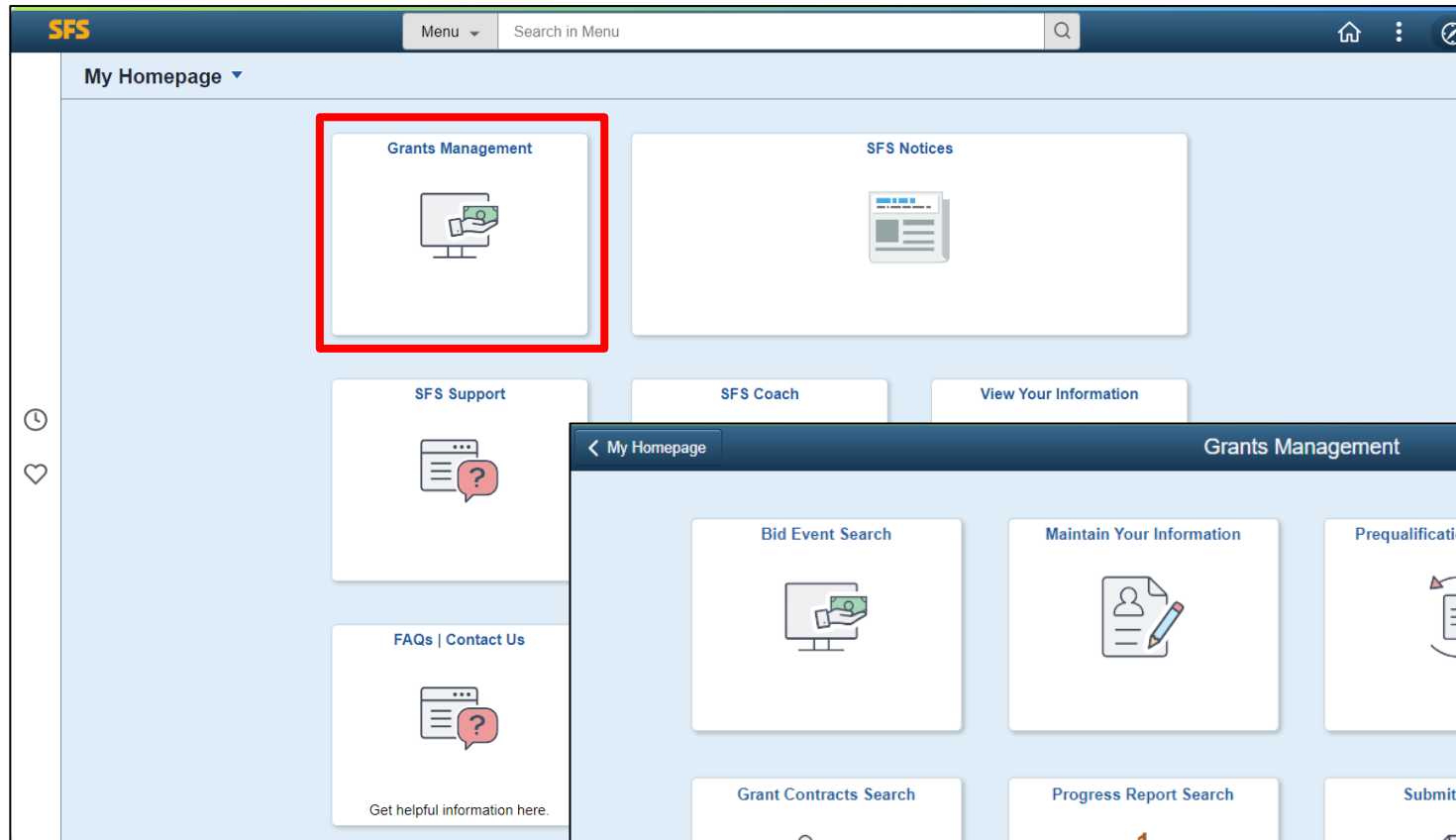
- New York State is transitioning grants management activities from the Grants Gateway to the Statewide Financial System (SFS) on **January 16, 2024**.
 - SFS is New York State (NYS) government's accounting and financial management system used to manage contracts and payments.
- State Agencies who are using the Grants Gateway today will transition to using SFS for those business processes they are currently performing in the Grants Gateway.
- Grantees will transition to using SFS to create and submit prequalification applications and may also use SFS to support other aspects of the grants management business process (e.g., searching for bid opportunities, responding to bids, approving grant contracts, submitting claims), depending on the work they are doing with agencies.
- Following the transition, the Grants Gateway will be retired.
- Key components of the grants management business process **remain the same**, with the understanding that there will be some differences in the way SFS supports the business process, given it is a different system.

Grantee Use of SFS

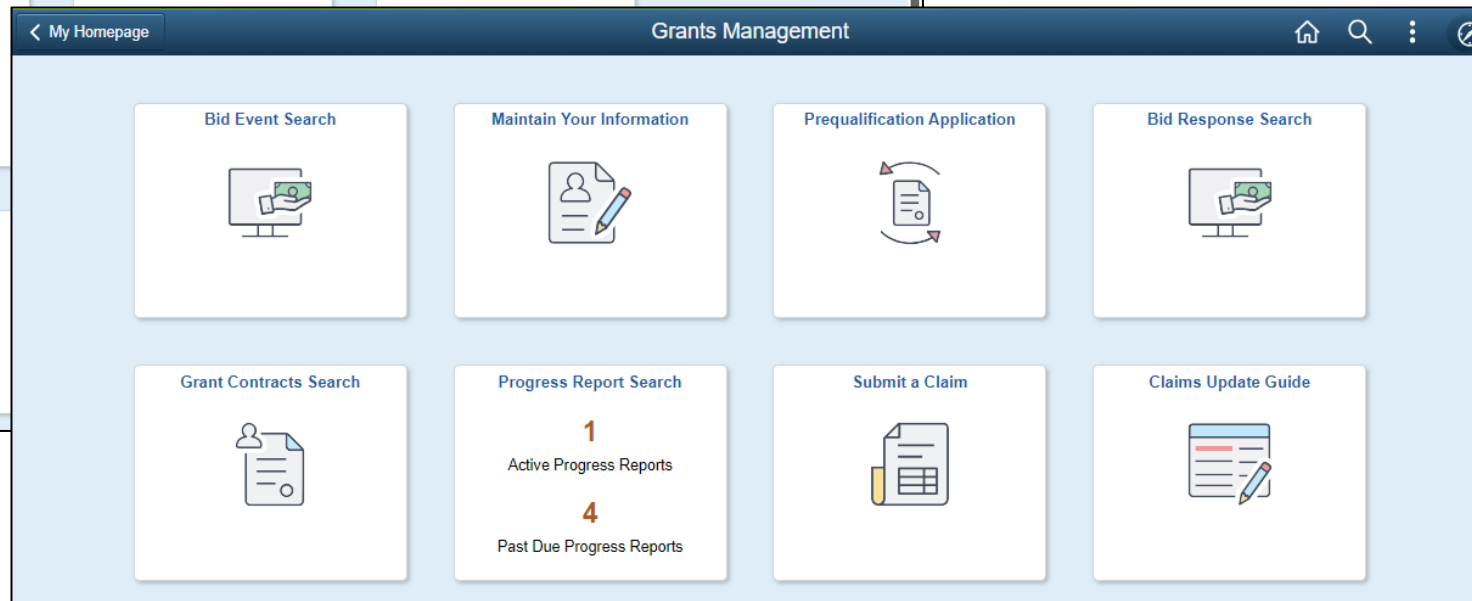
The table below provides examples of how SFS will be used by Grantees to support aspects of the grants management business process, depending on the work they are doing with agencies.

Business Process Area	Grantee Use of SFS
Prequalification	<ul style="list-style-type: none">• Entering and submitting a prequalification application for agency review and approval
Bids	<ul style="list-style-type: none">• Using the SFS Public Portal to search for grant opportunities (bid events)• Responding to a grant opportunity
Grant Contracts	<ul style="list-style-type: none">• Previewing the contract agreement• Updating the budget and/or workplan (as needed)• Reviewing and approving the grant contract
Progress Reports	<ul style="list-style-type: none">• Entering and submitting a progress report for agency review and approval
Claims	<ul style="list-style-type: none">• Entering and submitting a grant claim for agency review and approval

Grants Management in SFS



All grants management features in the SFS Vendor Portal are conveniently located under one section, labeled **Grants Management**.



Streamlined Prequalification Process

- User friendly screens
- Easy navigation between sections
- Fewer application questions
- Save for Later
- Versioned applications

The screenshot shows a web browser window titled "Prequalification Application". The interface includes a sidebar on the left with navigation options: "Organization Information" (marked as "Visited"), "Required Documents" (Not Started), "Contacts" (Not Started), and "Submit" (Not Started). The main content area features a header with "Not-for-profit organizations must answer the following questions designed to provide State agencies with the information needed to make informed prequalification determinations." Below this, there are several fields: "Supplier ID" (with a "Supplier Information" link), "Supplier Name", "Email ID" (test123@sfs.ny.gov), "Prequalification Status" (Application In Progress), "Prequalification Expiration Date", "Organization Type" (Not-For-Profit), "State Agency" (DOH01, Department of Health), and "Tax Year End Date" (12/31). A "Save For Later" button is visible in the top right. The "Profile Questions" section contains two questions, each with a dropdown menu for "Explanation/Comments" (set to "No") and a "Text Responses" text area.

Uploading Required Documentation

- The Document Vault and the Prequalification Application are separated for clarity.

The screenshot displays the 'Prequalification Application' interface. On the left is a navigation sidebar with four items: 'Organization Information' (Visited), 'Required Documents' (Visited), 'Contacts' (Not Started), and 'Submit' (Not Started). The main content area contains instructions: 'Organizations must upload documents via "Attach" or "Attach with Additional Details" link below, depending on the specific document, which will be evaluated as part of the prequalification process. Documents must be in PDF format and under 20MB in size.' Below this are input fields for 'Supplier ID' and 'Supplier Name', and a 'Save For Later' button. A table titled 'Attachments' lists 10 required documents with columns for 'Required Documents', 'Attach', 'View/Delete', 'Attach with Additional Date Details', 'Date Attached/Uploaded', and 'Attached/Uploaded By'. A 'Comments' text area is located at the bottom of the main content area.

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

Adding Prequalification Contacts

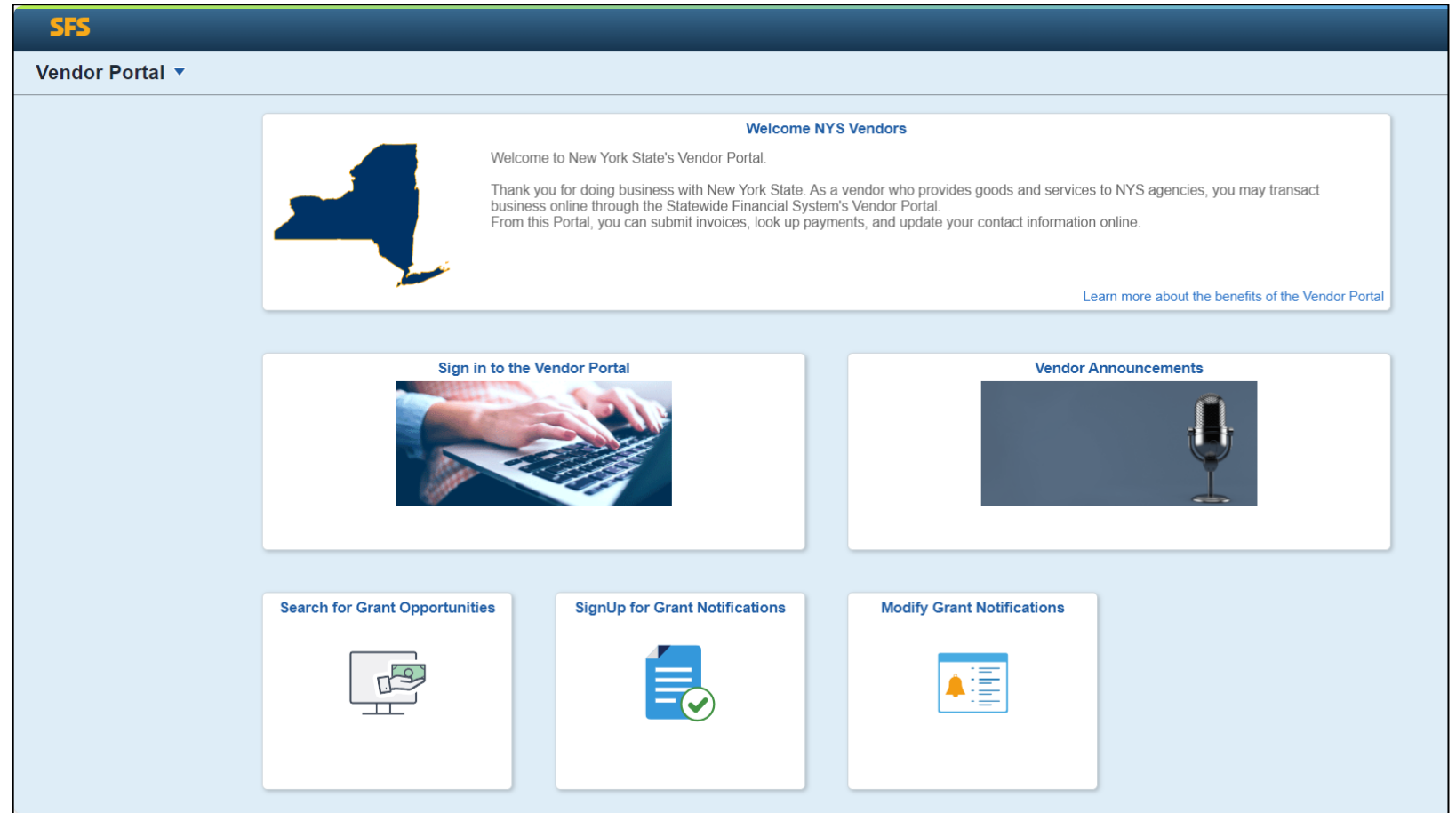
- Grantees can establish prequalification specific contacts to receive system-generated reminders and notifications.

The screenshot shows a web application window titled "Prequalification Application". On the left is a sidebar with four sections: "Organization Information" (Visited), "Required Documents" (Visited), "Contacts" (Visited, highlighted in green), and "Submit" (Not Started). The main content area has a header with "Previous" and "Next" navigation buttons. Below the header, it says "Identify the contact information for your organization." and shows a "Supplier ID" field. A "Save For Later" button is in the top right. A table below shows 2 rows of contact data. The table has columns for SetID, Supplier ID, Contact Name, Telephone, Contact Type, and Email ID. Each row has edit and delete icons. An "Add Contacts" button is at the bottom left.

SetID	Supplier ID	Contact Name	Telephone	Contact Type	Email ID		
1	SHARE	Jane Doe	555-123-4567		jdoe@test.com		
2	SHARE	Bob Smith	555-123-4568		bsmith@test.com		

Using the SFS Public Portal

- Using the SFS Public Portal, prospective grantees and the general public can:
 - Search for grant opportunities (also known as bid events)
 - Sign up for grant notifications
 - Modify contact information or preferences previously selected for grant notifications



SFS Vendor Portal credentials are not required to access the SFS Public Portal

Searching for Grant Opportunities

- Grant opportunities can be searched for in a variety of ways, including by:
 - Status (e.g., Available, Anticipated, etc.)
 - Eligibility (e.g., Not-For-Profit, Governmental Entity, etc.)
 - Service Area (e.g., Health Services, Family Supports, etc.)
- To respond to a grant opportunity, grantees must have credentials to access the SFS Vendor Portal and be prequalified.



Search for Grant Opportunities

Enter the search criteria and click the Search button

▼ Search Criteria


Event ID

Search by Grant Opportunity

Search by Due Date From  To 

Search by Status ▼

Search by Eligibility ▼

Search by Funding Agency 

Search by Service Area ▼

Responding to Grant Opportunities

- Prequalified grantees interested in responding to a grant opportunity log in to the SFS Vendor Portal.
- As part of their response, grantees:
 - Enter contact information for the person who can answer any questions about the response.
 - Enter the Site or Project Address where the grant will be used or funds will be spent.
 - Respond to application questions setup by the agency.
 - Enter the budget and work plan information (if applicable).
 - Submit their total bid amount.

Period Budget Summary

Budget Category	Grant Funds Requested	Match Funds	Match % Calculated	Match % Required	Other Funds	Total	Category Details
1 SALARY	10000.00	0.00	0	0	0.00	10000.00	
2 FRINGE	10000.00	0.00	0	0	0.00	10000.00	
3 CONTRACTUAL	0.00	0.00	0	0	0.00	0.00	
4 TRAVEL	0.00	0.00	0	0	0.00	0.00	
5 EQUIPMENT							
6 SPACE/PROPERTY RENT							
7 SPACE/PROPERTY OWN							
8 UTILITIES							
9 OPERATING EXPENSES							
10 OTHER							

Objectives >> Tasks >> Performance Measures

Objective Task Perf. Measure Display Type: All

Select	Type	Sort Order	Name	Description
<input type="checkbox"/>	Objective	1	Reduce Opioid related deaths	Reduce Opioid related deaths in New York State
<input type="checkbox"/>	Task	1.1	Educate community	Educate community members on correct use of Narcon
<input type="checkbox"/>	Performance Measure	1.1.1	Training Numbers	Number of community members trained
<input type="checkbox"/>	Objective	2	Increase the number of opioid related resources available to community members	Increase the number of opioid related resources available to community members
<input type="checkbox"/>	Task	2.1	Distribute narcan kits to trained community members	Distribute narcan kits to trained community members
<input type="checkbox"/>	Performance Measure	2.1.1	Number of kits distributed	Number of kits distributed

Objective Task Perf. Measure Display Type: All

Collaborating with Agencies & Approving Grant Contracts

Maintain Contract Documents

Document Management [Return to Document Search](#)

This contract is currently pending your review. Please update each section(s) of the contract requiring your review by selecting each link available under the Information Available for Review section. Select the View Document button to view the current contract agreement. When you have finished with your review, select the Approve button to return the contract back to the Agency.

Contract ID 00000000000000000000124573
 Description SFS01-C00024GM-3650000
 Document Administrator DOE, JOHN
 Approval Start Date 09/29/2023 1:36PM
 Begin Date 10/01/2023
 Expire Date 09/30/2024
 Document Status Pending Review
 Owner

Information Available for Review ⓘ

	Period Start Date	Period End Date	Period Amount	Budget Detail Period	Budget Detail Status	Budget Detail Review Date	Budget Period Mark as Reviewed	Work Plan Period	Work Statu
1	10/01/2023	09/30/2024	22,000,000	Period 1	New		<input type="checkbox"/>	Period 1	New

Comments History

[DOE, JANE 2023-09-29-13:55:32.000000]
 Increase the budget so it matches the period amount.

Comments

- Grantees preview the contract agreement and collaborate with the agency (as needed) to update the budget and workplan information, before approving the contract agreement.

- Information previously entered on the grant opportunity and response (including budget and work plan) carries over to the contract agreement in SFS.

Maintain Contract Documents

Document Management [Return to Document Search](#)

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 Description SFS01-C00024GM-3650000
 Document Administrator DOE, JOHN
 Approval Start Date 09/29/2023 1:36PM
 Begin Date 10/01/2023
 Expire Date 09/30/2024
 Document Status Pending Review
 Owner

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

Approve Deny

[View Contract Agreement](#)

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



Viewing the Contract Agreement

- A PDF of the contract agreement is available to view in SFS.

STATE OF NEW YORK MASTER CONTRACT FOR GRANTS FACE PAGE																															
STATE AGENCY (Name & Address): Statewide Financial System Statewide Financial System 1220 Washington Avenue Albany, NY 12226	BUSINESS UNIT/DEPT ID: SFS01 3650000 CONTRACT NUMBER: SFS01.C00019GM																														
CONTRACTOR NAME:																															
CONTRACTOR IDENTIFICATION NUMBER: NYS Vendor ID Number: _____ Federal Tax ID Number: _____	ATTACHMENTS PART OF THIS AGREEMENT: Attachment A: <input type="checkbox"/> A-1: Agency-Specific Terms <input type="checkbox"/> Attachment A-2: Program-Specific Terms <input type="checkbox"/> Attachment A-3: Federally Funded Programs Attachment B: <input checked="" type="checkbox"/> ATTACHMENT B-1 -- EXPENSES <input type="checkbox"/> B-2 Performance Based Budget <input type="checkbox"/> B-3 Capital Budget <input type="checkbox"/> B-4 Net Deficit Budget <input type="checkbox"/> ATTACHMENT B-1(A) -- EXPENSES (AMENDMENT) <input type="checkbox"/> B-2(A) Performance Based Budget <input type="checkbox"/> B-3(A) Capital Budget(Amend) <input type="checkbox"/> B-4(A) Net Deficit Budget(Amend)																														
CONTRACTOR PRIMARY MAILING ADDRESS: _____ _____ _____	ATTACHMENT C -- WORK PLAN																														
CONTRACTOR PAYMENT ADDRESS: <input checked="" type="checkbox"/> Check if same as primary mailing address	ATTACHMENT D PAYMENT AND REPORTING Additional Attachments																														
CONTRACTOR MAILING ADDRESS: <input checked="" type="checkbox"/> Check if same as primary mailing address																															
CURRENT CONTRACT TERM: From: 10/01/2023 To: 09/30/2024																															
AMENDED TERM: From: To:																															
<table border="1"> <thead> <tr> <th colspan="2">SIGNATURE PAGE</th> </tr> </thead> <tbody> <tr> <td colspan="2">IN WITNESS THEREOF, the parties hereto have electronically executed or approved this Master Contract on the dates below their signatures.</td> </tr> <tr> <td>In addition, I, acting in the capacity as Contractor, certify that I am the signing authority, or have been delegated or designated formally as the signing authority by the appropriate authority or official, and as such I do agree, and I have the authority to agree, to all of the terms and conditions set forth in the Master Contract, including all appendices and attachments. 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Date: 10/03/2023		Date: _____																													

Submitting Progress Reports

- Grantees manage all progress reports in one location and can use the filter feature to narrow down their list of progress reports based on criteria such as Project, Due Date, or Contract.

The screenshot displays the 'Manage Progress Reports' interface. On the left, a sidebar shows filters for report status: All Progress Reports (4), Not Submitted (0), Pending Review (0), Information Requested (0), Approved (1), Past Due (0), Due within 60 days (0), and Not Started (3). The main area shows a table of reports with columns for Contract #, Contract ID, Period #, Report Description, Due Date, Status, Agency Name, Project Name, User Assigned, and Supplier Name. A modal window titled 'Update Progress Report' is open, showing details for Contract # SFS01-C00021GM-3650000, Report ID Period 1 - Report 2, and Due Date 04/30/2024. Below this, a 'Performance Measures' table is visible with columns for Objective Number, Objective Name, Task Number, Task Name, Performance Measure Number, Performance Measure Name, Response Type, Integer (Target/Goal), and Integer Response.

Objective Number	Objective Name	Task Number	Task Name	Performance Measure Number	Performance Measure Name	Response Type	Integer (Target/Goal)	Integer Response
1	Training Numbers	1.1.1	Training Numbers	1.1.1	Training Numbers	Numeric		<input type="text"/>
2	Number of kits distributed - 100 kits	2.1.1	Number of kits distributed - 100 kits	2.1.1	Number of kits distributed - 100 kits	Numeric	50	<input type="text"/>

- The work plan performance measures entered on the contract are used to create the progress reports that are filled out by grantees.

Entering Grant Claims

- As part of entering a claim, grantees:
 - Select the contract and contract period for the claim
 - Enter the amount and dates the costs were incurred
 - Attach supporting documentation
 - Submit the claim for agency review

✕ Exit
Claim Entry and Submission
⋮

< Previous
Next >

Contract Selection
✔ Complete

Claim Header
✔ Complete

Claim Lines
✔ Complete

Claim Line Details
✔ Complete

Claim Summary
● Visited

Business Unit: SFS01 Claim Number: 000000026 ✕

Contract ID: 00000000000000000000124579 Supplier ID: ██████████

Description: SFS01-C00021GM-3650000 Supplier Name: ██████████

Project Name: SFS0000000000001 Supplier Location: MAINEPAY ██████████

Contract Begin Date: 10/01/2023 Claim Status: In Process

Contract Expire Date: 09/30/2024 Claim Date: 11/09/2023

Contract Max Amount: 22,000.00 Claim Type: Regular

Invoice ID: Invoice1234

Claim Initiated Date: 11/09/2023

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

Claim Line#: 1 Contract Period: 1 Period Date From: 10/01/2023 Period Date To: 09/30/2024

Line Type: Reimbursement [Line Comments](#)

[Line Attachments](#)

Reimbursement Claim Details

Budget Type EXPENDITURE

Cost Incurred Date From 10/02/2023 Cost Incurred Date To 11/09/2023

Reimbursement Funds						
Budget Category	Approved Grant Budget	Previous Cumulative Expenditure	In Process Expenditures	Expenditure for this Report	Reviewed Amount	Current Cumulative Expenditure
1 SALARY	22,000.00	0.00	3.00	5,000.00	0.00	5,000.00
Grant Fund Totals	22,000.00	0.00	3.00	5,000.00	0.00	5,000.00
Match Fund Totals	0.00	0.00	0.00	0.00	0.00	0.00

[Save](#)

Preparing for the Transition – Consider Renewing Your Prequalification Status

- Grantees with a prequalification status expiring this calendar year who are interested in renewing, should consider submitting the prequalification request in the Grants Gateway prior to the transition to SFS.
- The last day to submit a prequalification application in the Grants Gateway is **December 15, 2023**.
- If the prequalification application is not submitted in the Grants Gateway by **December 15**, Grantees can submit the application in the SFS Vendor Portal, beginning on **January 16, 2024**.
- As a reminder, an SFS Vendor Portal account is required to access SFS.
- Additional information regarding the transition from the Grants Gateway to SFS is included in the Grants Management in SFS on-demand information session, available on the Grants Management website.

Preparing for the Transition – Upcoming Training Opportunities

- Live, virtual training sessions on how to use SFS to perform grants management activities will be held in December.

Session Topic(s)	Date & Time
Entering and submitting prequalification applications	December 5 from 10:00 a.m. – 12:00 p.m.
Searching for and responding to grant opportunities (bids)	December 12 from 10:00 a.m. – 12:00 p.m.
Approving grant contracts and submitting progress reports	December 19 from 10:00 a.m. – 11:30 a.m.
Entering and submitting grant claims	December 21 from 9:00 a.m. – 10:00 a.m.

- Additional details regarding the training sessions will be published on the Grants Management Website (<https://grantsmanagement.ny.gov/>).
- Training sessions will be recorded, and the recordings will be available for playback after the live session has been held.
- A Vendor Handbook, which provides screenshots of SFS and step-by-step guidance on how to complete tasks in SFS, will also be available in December.

Recommended Next Steps for Grantees

- Playback the Grants Management in SFS on-demand information session available on the Grants Management website, which:
 - Provides Grantees with an overview of the transition from the Grants Gateway to SFS.
 - Reviews the activities Grantees are involved in within the Grants Management Lifecycle.
 - Discusses the activities that can be done now to prepare for the upcoming transition to SFS.
- Grantees should reach out to the SFS Primary Contact for their organization and work with that individual to confirm there is an SFS Vendor Portal account setup for their organization.
- Grantees should plan to attend upcoming training sessions.
- For questions or assistance using SFS, if the Primary Contact is no longer with their organization, or if they do not know who their primary contact is, Grantees should contact the SFS Help Desk:
 - helpdesk@sfs.ny.gov
 - (855) 233-8363

Questions and Answers