



Grants Management in the Statewide Financial System (SFS)

Agenda

- Grants Management in SFS Transition
- Grantee Use of SFS
- Transition Reminders
- Resources & Support

Grants Management is in SFS!

- On **January 16**, New York State transitioned grants management activities from the Grants Gateway to the Statewide Financial System (SFS).
 - SFS is New York State (NYS) government's accounting and financial management system used to manage contracts and payments.
- Agencies that used the Grants Gateway for specific grant programs and business functions now use SFS for the same grant programs and business functions.
- Prospective grantees and the general public can search for grant opportunities on the SFS Public Portal.
- Grantees now use SFS to submit prequalification applications and to support the business functions for the grant programs that were previously performed in the Grants Gateway.
- **Note:** A limited number of grant opportunities remain active and available for online application in the Grants Gateway.
 - These opportunities have not been converted to SFS and will be applied for and evaluated in the Grants Gateway.
 - Any resulting contracts will be processed in SFS.

Grantee Use of SFS

The table below provides examples of how SFS is currently being used by grantees to support aspects of the grants management business process.

Business Process Area	Grantee Use of SFS
Prequalification	<ul style="list-style-type: none">• Entering and submitting prequalification applications 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 grant opportunities
Grant Contracts	<ul style="list-style-type: none">• Previewing contract agreements• Updating budgets and workplans• Reviewing and approving grant contracts
Progress Reports	<ul style="list-style-type: none">• Entering and submitting progress reports for agency review and approval
Claims	<ul style="list-style-type: none">• Entering and submitting grant claims for agency review and approval

Transition Reminders

- Sign up to receive notifications about grant opportunities on the SFS Public Portal.
- Register as a NYS Vendor if you were not previously registered in the Grants Gateway.
 - To prequalify, apply for a grant opportunity, and do business with a New York State (NYS) agency, you need to be registered as a NYS Vendor.
- Set up your access in the SFS Vendor Portal.
 - This includes creating User IDs, adding the user's name (required for contract signatories) and email address to their user profile, and adding roles to each account.
- Keep your organizational information up to date in the SFS Vendor Portal.
- Stay connected with the agencies you are actively doing grants business with.
 - Not seeing a grant contract you expected to see in the system? Unsure how to submit payment requests? Reach out to your agency contacts.
- Utilize the resources and support available, including on-demand training materials, support calls, and the SFS Help Desk.

On-Demand Training in the SFS Vendor Portal

- Grants Management training is available in SFS Coach.
- To access SFS Coach, log in to the SFS Vendor Portal and click the **SFS Coach** tile on My Homepage.
- Grants Management training material includes:
 - Recorded webinars focused on each aspect of the Grants Management business process.
 - A Grantee Handbook, which provides screenshots of SFS and step-by-step guidance on how to complete tasks in SFS.
 - Quick reference guides and short videos focused on a specific topic.

The screenshot displays the 'SFS Coach Training' search interface. At the top, there is a navigation bar with 'My Homepage' and 'SFS Coach Training'. Below this is a search section titled 'Search User Training and Materials' with instructions: 'To select a Topic or Training Type, use the drop-down lists.', 'To search by the name of the material, type directly in the Training Material field or use the Training Material look-up feature by clicking on the magnifying glass.', 'Keyword search can be used with or without selecting any other search fields.', and 'Leaving all fields blank brings back all results; additional criteria returns more specific results.' The search filters include 'Topic' (SFS Training for Vendors), 'Training Type' (empty), 'Training Material' (Select Course Name), and 'Keyword(s)' (Enter Search Keywords). A 'Search' button is present. Below the search section is a 'Search Results' table with 51 rows. The table has columns for Topic, Training Material, Notes, and Training Type.

Topic	Training Material	Notes	Training Type
1 SFS Training for Vendors	! Entering a Prequalification Application	Presentation from the Entering and Submitting Prequalification Applications virtual training session.	SFS Event
2 SFS Training for Vendors	! Grant Contracts And Progress Reports	Presentation from the Grants Management in SFS Grantee Training Grant Contracts & Progress Reports virtual training	SFS Event
3 SFS Training for Vendors	! Grants Claims	Presentation from the Grants Management in SFS Grantee Training Grant Claims virtual training session.	SFS Event
4 SFS Training for Vendors	! Searching/Responding To Grant Opportunities (Bid	Presentation from the Searching For And Responding To Grant Opportunities (Bids) virtual training session.	SFS Event
5 SFS Training for Vendors	! Grantee Processing in SFS	This Handbook provides the knowledge and skills to support grant making activities in SFS.	Handbook

New Reference Guide – Information to Support Grantees

- A new reference guide with answers to frequently asked grantee questions is available in SFS Coach.
- The **Information to Support Grantees** reference guide contains:
 - Information on topics such as vendor registration, accessing the SFS Vendor Portal, prequalification, and working with grant contracts.
 - Screenshots, helpful tips, and reminders.
 - Direct links to additional training and reference material available in SFS Coach.
- This reference guide is being shared with agencies and grantees and will continue to be updated as new frequently asked questions are identified.

Information to Support Grantees reference guide

Table of Contents

- This reference guide contains answers to frequently asked grantee questions regarding the use of the Statewide Financial System (SFS) Public Portal and SFS Vendor Portal.
- Select one of the hyperlinks below, to quickly find information on a specific topic:
 - [Using the SFS Vendor Portal](#)
 - [Vendor Registration](#)
 - [Accessing the SFS Vendor Portal](#)
 - [Finding Grants](#)
 - [Managing Grants](#)
 - [Viewing & Updating Grants](#)
 - [Working with Grants](#)
 - [Submitting Grants](#)
 - [Accessing Vendor Information](#)

Prequalification in the SFS Vendor Portal

- Select the **Prequalification Application** tile to enter and submit a new application, or work on an in-process application.
 - This is a renewal application.
- As a reminder, you must have an SFS account and the appropriate SFS Vendor role assigned to the **Prequalification Application**.

Grants Management Features in the SFS Vendor Portal

- The most commonly used Grants Management features in the SFS Vendor Portal are available by selecting the **Grants Management – State** tile.
- Individuals must be assigned the applicable Grants Management roles in SFS in order to have access to an associated Grants Management tile.
- As a reminder, the [SFS Vendor Portal Access Reference Guide](#) and the [SFS Vendor Role Guide](#) provide a list of the roles available in the SFS Vendor Portal.

Support Calls & the SFS Help Desk

- Support calls are available each Wednesday to:
 - Discuss questions grantees have based on their use of SFS for grants management activities.
 - Share information on specific topics.
- Webex information for each Grantee support call is available on the [Grants Management website](#).
- In addition to the support calls, questions regarding SFS functionality can be submitted at any time to the SFS Help Desk.
 - Email: helpdesk@sfs.ny.gov
 - Phone: (518) 457-7717 or (855) 233-8363 (toll free)
 - Through the SFS Support Tile in the SFS Vendor Portal

SFS Virtual Support Calls

Grants Management in SFS: Support Call (Grantees)
March 13, 11:00 a.m. – 12:00 p.m.

SESSION TOPIC: Contract Collaboration

You are invited to participate in a virtual Grants Management in SFS: Post Go-Live Support Call. The purpose of this call is to:

- Discuss questions grantees have based on their use of SFS for grants management activities.
- Share any relevant reminders, tips, or known issues.

This call is intended for grantees using grants management functionality in SFS.

As a reminder, the [Troubleshooting Tips for SFS Users guide](#) provides a list of basic troubleshooting tips, reminders, and contact information for users who are unable to log in to the system or need assistance with the system.

WebEx Log In: <https://meetny-events.webex.com/meetny-events/j.php?MTID=md45bfaf5d130661eb69faec167d9f186>

Event Number: 2555 965 4326

Event Password: Grants24

Conf. Call:

Join by phone: 518-549-0500

Event Access code: 2555 965 4326

Phone Password: 47268725

Upcoming Virtual Support Calls

Grants Management in SFS: Support Call (Grantees)
March 20, 11:00 a.m. – 12:00 p.m.

Grants Management in SFS: Support Call (Grantees)
March 27, 11:00 a.m. – 12:00 p.m.

Questions and Answers