

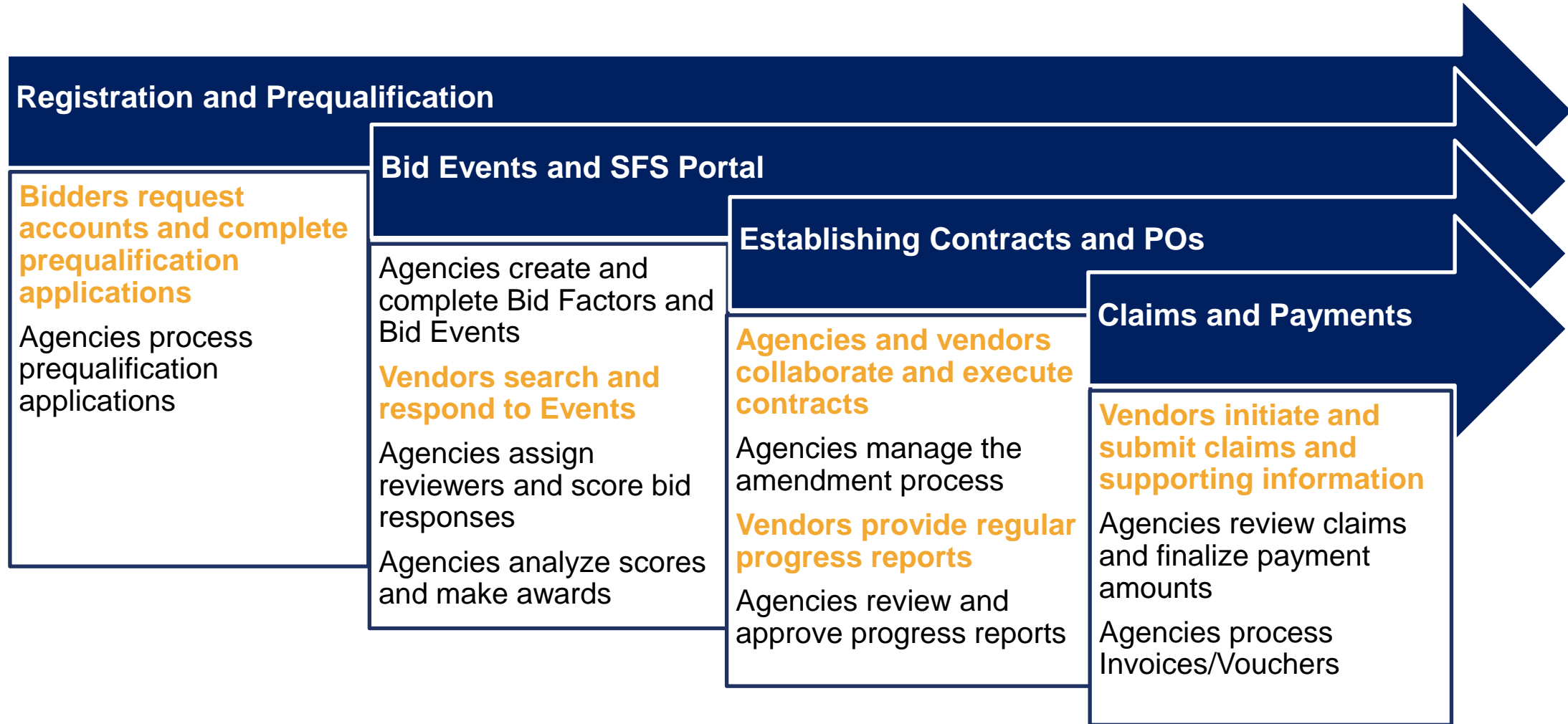


Grants Management in the Statewide Financial System (SFS)

Session Objectives

- Provide Grantees with an overview of the transition from the Grants Gateway to SFS.
- Review the activities Grantees are involved in within the Grants Management Lifecycle.
- Discuss the activities that can be done now to prepare for the upcoming transition to SFS.
- Share information about upcoming training opportunities.
- Review next steps.

Grants Management Lifecycle



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.

Preparing for the Transition – Verify SFS Access

- Existing Grants Gateway accounts will NOT be converted to the SFS Vendor Portal.
- It is important that organizations prepare for this transition by logging in to SFS.
- If your organization previously registered with the Grants Gateway or has a SFS Vendor ID, your Primary Contact was granted access to the SFS Vendor Portal.
- The Vendor Delegated Administrator is responsible for making account changes, designating access for other User IDs within their organization, and maintaining your profile in SFS.
- If your organization is unable to access SFS, contact the SFS Help Desk at helpdesk@sfs.ny.gov or (855) 233-8363.

Accessing SFS

- SFS is accessible using a computer or mobile device with an internet connection.
- SFS website: <https://www.sfs.ny.gov/>
- Vendors doing business with New York State agencies access SFS by clicking the **Vendor Portal Login**.
- The SFS Vendor Portal is currently available to:
 - Sign up for electronic payments
 - Review payment information
 - Maintain addresses and contact information

Home About SFS Customers Vendors Procurement

New York Statewide Financial System

CUSTOMERS
Manage your account, invoices and online payments.
CUSTOMER PORTAL LOGIN

VENDORS
Submit invoices, look-up payments and update your contact information.
VENDOR PORTAL LOGIN

AGENCIES
Access New York State's financial and accounting system.
AGENCY PORTAL LOGIN

Preparing for the Transition – Consider Renewing Your Prequalification Status

- If your prequalification status expires this calendar year and you are interested in renewing, 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**, your organization 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.

Grants Gateway Data Conversion

- Many Gateway transactions will be converted to the new system. The following slides describe the type of transactions and components that will be converted. It is important to note that relatively large amounts of data will remain accessible only via the Gateway. Examples are included in upcoming slides.
- Grantees will have approximately 6 months following go-live to download and store any historical information not converted to SFS. Thereafter, access will be further restricted. Additional details will be shared as they become available.

Conversion: Prequalification

- If a Grantees Grants Gateway Document Vault is in a “Prequalified” status at go-live, the following components of their MOST RECENT APPROVED prequalification application will be converted:
 - Prequalification Status
 - Prequalification Expiration Date
 - Responses to Organization Capacity, Compliance, and Integrity Questions
 - Required Documents
- Supporting materials such as Status Change history and previous prequalification applications will not be converted.
- Grantees that are NOT prequalified at go-live must complete this requirement in SFS. Regardless of prior Prequalification history, no materials will be converted.

Conversion: Grant Opportunities / Applications

- A limited number of State agency grant opportunities may be active or available for online application in the Grants Gateway at go-live. Such opportunities will not be converted to SFS; but rather allowed to run their course. Note, any resulting contracts will be processed in SFS.
- Only successful grant applications that resulted in a contract developed and executed in the Gateway will be converted. In such cases, only the Gateway's Application PDF will be converted. Examples of applications and materials that will not be converted include:
 - Applications started but not submitted
 - Applications submitted but not funded
 - Applications funded by any mechanism other than a Grants Gateway contract
 - Status Change and Workflow histories
 - Any materials captured during the application process including comments and uploads not included in the Application PDF

Conversion: Progress Reports and Payments

- Progress Reports:
 - Progress reports initiated, submitted and/or approved in the Grants Gateway will not be converted.
- Payments:
 - Grantees that participated in online claiming in the Gateway can expect:
 - Only approved Grants Gateway payments will be converted.
 - Payments not approved at go-live will need to be reentered in SFS.
 - Period-specific budget category balances will be derived from converted claims.
 - The Grants Gateway Payment PDF will be available for review in SFS.
 - Additional Information such as Status History, comments, and any uploads not included in the Payment PDF will not be carried forward to SFS.

Conversion: Contracts and Amendments

- In Process Contracts, e.g., Contracts that have not been fully executed:
 - Grantees that are actively negotiating and signing contract(s) in the Gateway prior to go live can expect to resume work in SFS post cutover. The following points are noteworthy:
 - Contracts will retain their Grants Gateway contract number.
 - Contracts will inherit the newly updated NYS Grant Contract Template.
 - Signatures accumulated in the Grants Gateway will be erased.
 - Contract properties including budget and workplan data will be carried forward to avoid reentry.
 - Additional information such as Status Change History, Comments, and Document Uploads will not be available and may need to be manually reentered or uploaded and reattached in SFS.

- Approved Contracts:
 - All contracts approved in the Grants Gateway will be converted. Note:
 - Contracts will retain their Grants Gateway contract number.
 - The fully executed Contract Document (PDF) will be converted.
 - Contract properties including budget and workplan data will be carried forward to avoid reentry in the event the contract is amended.
 - Additional information such as Status Change History, Comments, and Document Uploads will not be available and/or need to be manually reentered or uploaded and reattached in SFS.

Upcoming Training Opportunities

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

Next Steps

- Reach out to the SFS Primary Contact for your organization and work with that individual to confirm your organization can access the SFS Vendor Portal.
- If your organization is unable to access the SFS Vendor Portal, contact the SFS Help Desk:
 - helpdesk@sfs.ny.gov
 - (855) 233-8363