Creating a contract in SFS

1. Within SFS, go to Procurement Contracts → Add/Update Contract tab.

2. Within the *Add a New Value* tab, leave all values as there are and click Add.

Contract Entry

| Find an Existing Value | **Add a New Value** |

SetID SHARE 🔍

*Contract ID NEXT

Style ID PO 🔍

*Contract Process Option Purchase Order ▾

Add

3. On the Contract screen, complete the fields with asterisks.

Begin Date – Estimated candidate onboarding date

Expire Date – End of service term (task order engagement)

Maximum Amount should be the total estimated amount of the HBITS engagement

(# of Hours) X (Bill Rate) X (# of Months)

Supplier & Supplier ID: Entering either will then populate the other.
https://online.ogs.ny.gov/purchase/snt/awardnotes/7301223158ContractorInfo.pdf

NY Contract Description: This should be what you're buying:
Job Title – Contract Number – Award Number
(i.e., Syst Arch-PH68911-23158) 30-character limit

PO Defaults: BU should be agency business unit and Buyer should be generic

Business Unit: by Agency

NYS Contract #: Must begin with "OC" prefix, followed by "HBIT", and the last 5 digits of the task order # assigned by OGS
(i.e., OCHBIT12345) 11-character limit

Department: Agency selects the appropriate Department

Audit Type: EBV

Contract Profile: PHNR0010

4.   Change Status to "Pending OSC Approval" and Save.

HOW TO COMPLETE FORM A

AC 3271-S (Effective 4/12)

FORM A

New York State Consultant Services
Contractor's Planned Employment
From Contract Start Date Through the End of the Contract Term

State Agency Name:

State Agency Department ID: Agency Business Unit:

Contractor Name: Contract Number:

Contract Start Date: /   /   Contract End Date: /   /

Employment Category	Number of Employees	Number of Hours to be Worked	Amount Payable Under the Contract
0.00	0.00	0.00	$0.00
Software Developer 15-1252.00 Hourly Bill Rate: $90.25	1	5,200.00	$469,300.00
	0.00	0.00	$0.00
	0.00	0.00	$0.00
	0.00	0.00	$0.00
	0.00	0.00	$0.00
	0.00	0.00	$0.00
	0.00	0.00	$0.00
	0.00	0.00	$0.00
	0.00	0.00	$0.00
	0.00	0.00	$0.00
	0.00	0.00	$0.00
	0.00	0.00	$0.00
	0.00	0.00	$0.00
	0.00	0.00	$0.00
Grand Total			

Example (label for the Software Developer row)

Name of person who prepared this report:

Title: Phone #:

Preparer's Signature: _____
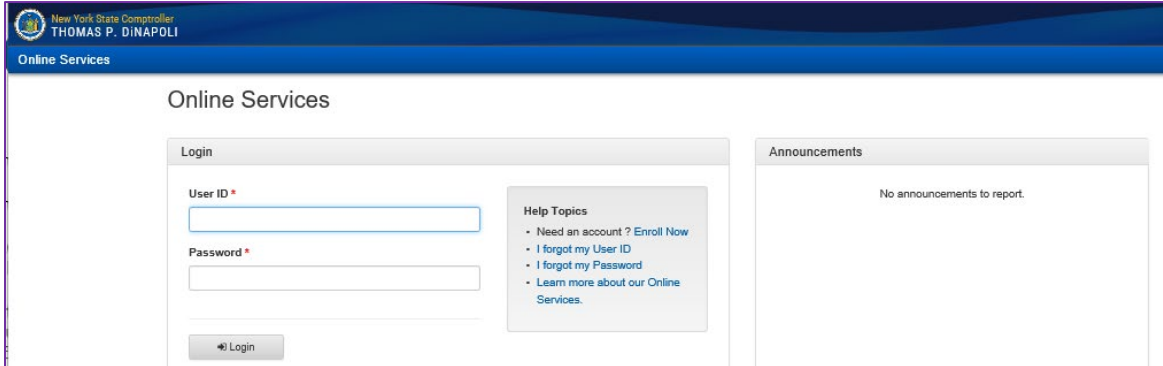
Date Prepared: /   /

(Use additional pages, if necessary)   Page   of

3

Commented [DG1]: State Agency Name: Enter the Authorized User, not OGS.

Commented [DG2]: State Agency Department ID: Enter the SFS Department ID of the Authorized User. Please refer to your Agency's Finance Office to identify.

Commented [DG3]: Agency Business Unit: Enter the SFS Agency Business Unit of the Authorized User. For example: DOH01, OFT01, WCB01, etc. Please refer to your Agency's Finance Office to identify.

Commented [DG4]: Contractor Name / Contract Number: Enter the selected Contractor's Information: https://online.ogs.ny.gov/purchase/snt/awardnotes/7301223158ContractorInfo.pdf

Commented [DG5]: Contract Start and End Date: Enter the proposed Start and End Date of the Candidate. A new/revised OC transaction is not necessary if the initial engagement dates should change. However, revised Onboarding details must be sent to the OGS HBITS Team.

Commented [DG6]: Employment Category: Enter the occupation and job code that matches or best fits the HBITS Job Title you're hiring: https://www.onetonline.org/find/all

Enter the Hourly Bill Rate for the HBITS Job Title (based on Region and Skill Level) Contractor Pricing Information: https://online.ogs.ny.gov/purchase/snt/awardnotes/7301223158ContractorInfo.pdf

Commented [DG7]: Number of Employees: Typically, this is "1" unless hiring multiple positions with the same Contractor for a specific task order.

Commented [DG8]: Number of Hours to be Worked: Calculate based on # of Hours per week and the length of engagement. For example: 40 Hours x 130 Weeks = 5,200 Hours

Commented [DG9]: Amount Payable Under the Contract: Equals the (Total # of Hours to be worked) X (Contractor Bill Rate) For example: 5,200 x $90.25 = $469,300.00

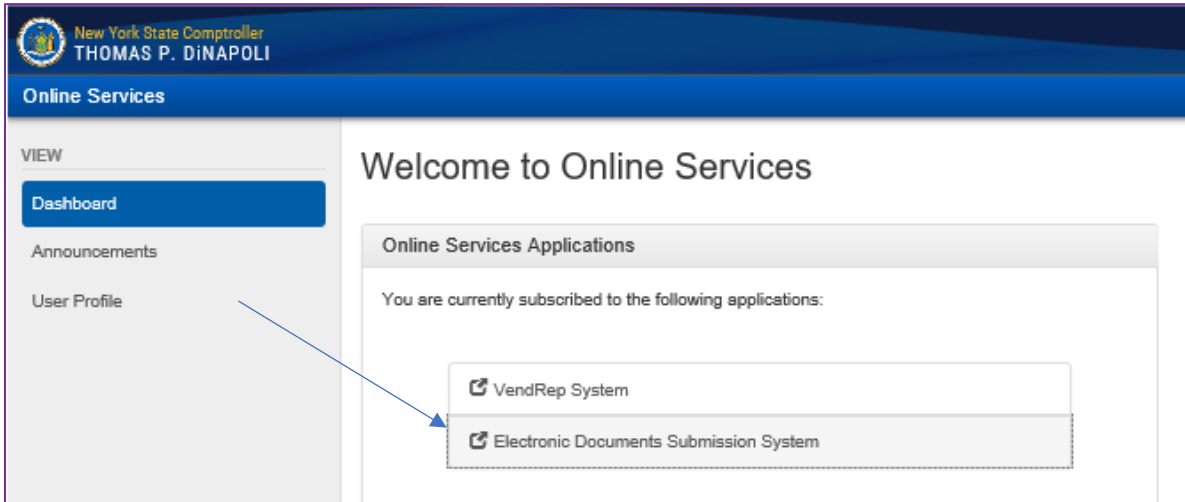**Commented [GD(10)]:** Enter the Preparer's information, sign, and date.

Uploading to EDSS

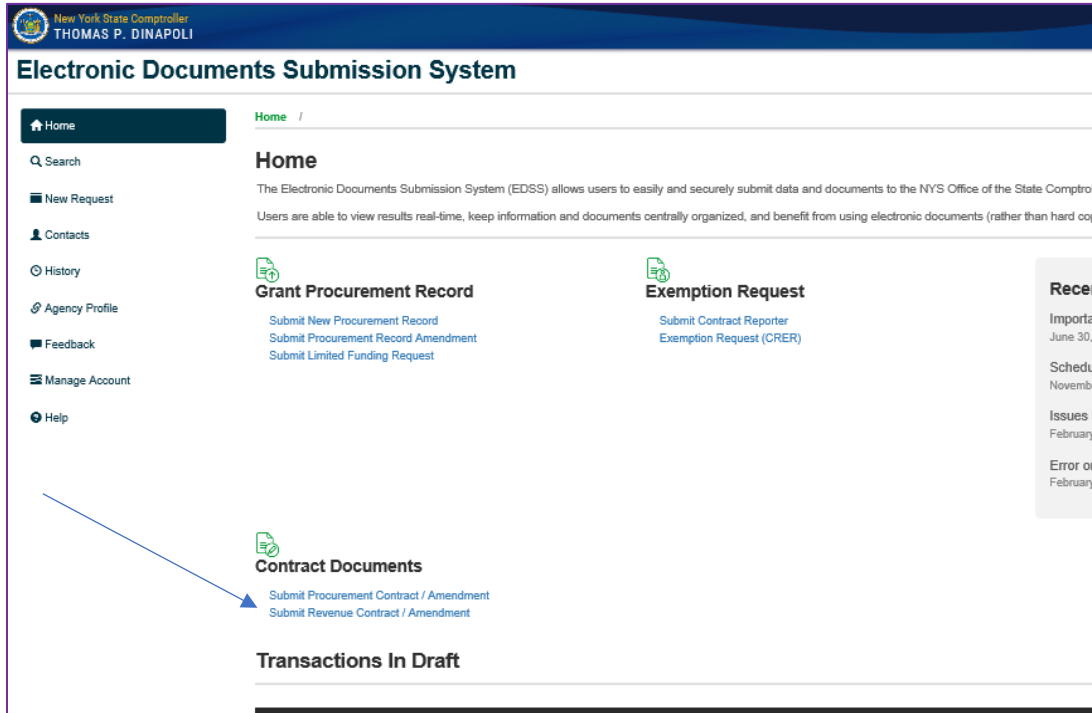1. Sign into the OSC Online Services Portal (for VendRep and EDSS).

2. Select the Electronic Documents Submission System.

3. On the Home Page, you will see any Transactions in Draft (not yet submitted to OSC), In Progress (pending OSC, Additional Information Requested), and Recently Completed (Approved or Non-Approved).

4. Click on the *Submit Procurement Contract/Amendment* link.

5. Within the Audit ID field type the Agency Business Unit and search. This will then populate active transactions. Alternately, you can search by the SFS ID that was created.
Select the appropriate OC transaction.

Find Procurement Contracts   Why can't I find my electronic transaction?

Audit ID
OMH

PeopleSoft ID
Optional

Document Type	NY Audit ID	SFS PeopleSoft ID	Seq #	Supplier ID	Supplier Name
Contract Amendment	OMH01-C020444-3650000	0000000000000000000019475	015	1000014654	ST JOSEPHS HOSPITAL HEALTH CENTER
Contract Amendment	OMH01-C100439-3650000	0000000000000000000042388	047	1100078253	NEW PARADIGM PSYCHOLOGICAL SERVICES PLLC
Contract Amendment	OMH01-C200135-3650547	0000000000000000000026649	014	1000001252	NEW YORK STATE INDUSTRIES FOR THE
Contract	OMH01-C201321-3650433	0000000000000000000093003	000	1100151768	STEPHEN S STARR MECHANICAL CORP
Contract	OMH01-C201322-3650433	0000000000000000000093759	000	1000011301	THE METRO GROUP INC
Contract	OMH01-C201323-3650462	0000000000000000000093620	000	1000008213	SIEMENS INDUSTRY INC
Contract	OMH01-C201371-3650431	0000000000000000000093004	000	1100155782	MIKERI GROUP INC
Contract	OMH01-OP101495-3650000	0000000000000000000091874	000	1000048674	DENTAL HEALTH PRODUCTS INC
Contract	OMH01-S201349-3650631	0000000000000000000093930	000	1100256131	BRETT C AMO
Contract	OMH01-T201389-3650275	0000000000000000000092579	000	1100164359	ADMIRAL STAFFING INC

⊘ Cancel   Q Search   Clear

6. Once on the next page, drag and drop all of the procurement documents.

Upload the following documents:
- Form 1: Task Order Request Form (Final Version)
- Form 3A Summary: Authorized User Technical Evaluation Summary
- Form 3B Summary: Authorized User Interview Summary
- Form A: New York State Consultant Services Contractor's Planned Employment (AC 3271-S)

   Note: For help on Form A, please refer to OSC's Guide to Financial Operations: https://www.osc.state.ny.us/state-agencies/gfo/chapter-xi/xi18c-consultant-disclosure

   You will enter the occupation and job code on the form that matches or best fits the HBITS Job Title you're hiring: https://www.onetonline.org/find/all

7. You can then click the *Upload All* button and once completed they will be listed at the bottom. You will then assign the "Procurement Documents" for each file and click Save on the right-hand side.

8. Once all files have been updated and saved, click Next.

9. Add necessary additional contacts on the next page.
10. The final screen will be a summary of the contract/transaction you're submitting to OSC. Once you review this, check the box at the bottom of the page certifying the information, and click Submit.

This will then be sent to OSC's queue for review. If they have any questions, you will receive an email with the additional information being requested. You will then need to go into EDSS to address the questions and/or upload additional documents needed.

Once approved, you will receive an automated email and you can go back into EDSS< find the transaction and save the executed contract page. **The Signature Page with OSC Approval must be sent to the OGS HBITS Team with Onboarding information.**

Transactions Recently Completed

All Submissions ⌄

Submission Type	SFS Record ID	Seq #	Agency Ref #	Record Name	Status	Start Date	Amount
Procurement Contract	OMH01 - C200876 - 3650300	000	C200876	BPI MECHANICAL SERVICE INC	Approved	05/01/2019	$12,520.34
Procurement Amendment	OMH01 - C200283 - 3650614	003	C200283	CE POWER ENGINEERED SERVICES LLC	Approved	08/01/2019	$0.00
Exemption Request	OMH01 - 0000784 - 3650000	000	GEEL	GEEL Community Services, Inc.	Approved	07/01/2021	$257,520.00
Procurement Amendment	OMH01 - L901070 - 3650300	027	L901070	GLEN STREET ASSOCIATES LLC	Approved	04/01/2012	$28,522.80
Procurement Contract	OMH01 - CM100205AI - 3650614	000	CM100205AI	LOCUMTENENS COM LLC	Approved	11/02/2021	$700,800.00

📎 Attachments

Document Type	Description ▲	File Name	Date Uploaded	Type	Size
Procurement Documents	CM100210AI-3650614 Supporting Docs - Rajagopal	CM100210AI-3650614 Supporting Docs - Rajagopal.pdf	10/27/2021	Adobe Acrobat	746.66 KB
Transaction Identifying Documents	STS	STS.pdf	10/27/2021	Adobe Acrobat	86.46 KB
Signature Page with OSC Approval	Signature Page with OSC Approval		11/01/2021	Adobe Acrobat	188.20 KB
Contract	Signed Signature Page - Rajagopal	Signed Signature Page - Rajagopal.pdf	10/27/2021	Adobe Acrobat	172.68 KB