



User ID

Password

 **Sign In**

 **Change Password**

# USING FAMIS



Published by:



**The Division of Financial Operations**

**Joel I. Klein, Chancellor**



## **USING FAMIS**

**WAS PRODUCED BY**

**THE DIVISION OF FINANCIAL OPERATIONS**

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February 2008

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Education of the City of New York

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# I. INTRODUCTION

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The purpose of this guide is to introduce and familiarize the user with basic information to the many applications found within the **FAMIS** Portal.

With this in mind, only the initial screens, which allow you to sign in, get a short blurb regarding the respective application and access the opening screen are shown. Subsequent screens necessary to complete the entire application are not shown and appear only after inputting required data. The [Help ?](#) screen however, provides information not only for the initial screen, but all subsequent screens as well..

**FAMIS** is an acronym for:  
**F**inancial **A**ccounting **M**anagement **I**nformation **S**ystem

**FAMIS** is an automated financial system designed to link all financial accounting transactions, from budget initiation to procurement and payment of final invoices. By using **FAMIS**, concerned personnel will gain comprehensive access to data for budget preparation and financial management decisions.

\*\*

The following applications are incorporated into the FAMIS Portal and may appear depending upon your FAMIS Security Profile.

^ Purchasing / Payments
<input type="radio"/> Adjustments & Payments
<input type="radio"/> <b>Banking Survey</b>
<input type="radio"/> Certification of Delivery
<input type="radio"/> <b>Core Curriculum</b>
<input type="radio"/> Courier: Special Delivery
<input type="radio"/> <b>Financial Processing</b>
<input type="radio"/> Non List Requisition
<input type="radio"/> PA/PTA Grant Program
<input type="radio"/> Pre Encumbrance
<input type="radio"/> Procurement Card
<input type="radio"/> Purchasing
<input type="radio"/> Report Card Ordering
<input type="radio"/> SIPP
<input type="radio"/> Voucher

^ Approval
<input type="radio"/> Approval Box
<input type="radio"/> Approval Tracking
<input type="radio"/> Rejection Box

^ Inquiry
<input type="radio"/> Document Inquiry
<input type="radio"/> Open Document Inquiry
<input type="radio"/> Spending Plan Inquiry
<input type="radio"/> Vendor Inquiry

^ Miscellaneous
<input type="radio"/> Book Buy Back
<input type="radio"/> Broadcast Message
<input type="radio"/> Document Status
<input type="radio"/> Inventory
<input type="radio"/> <b>Principal Per Session</b>
<input type="radio"/> <b>P Card Expense Admin.</b>
<input type="radio"/> <b>Security Maintenance</b>
<input type="radio"/> Stop Payment Form
<input type="radio"/> Vendor Rating System

Access to certain screens within FAMIS is dependent on your title and FAMIS Security Profile. The six screens in **RED** are **not** available to all users. We have provided facsimiles of these screens along with the "mouse over" text in the "[Additional Screens](#)" section of this guide for those users who both require and have security access to them.

Please be aware that the **FAMIS** Portal is the first step in bringing financial information to school based personnel. We are constantly working to improve the **FAMIS** Portal and expect the following enhancements to go into production in the near future:

### **PROCUREMENT CARD EXPENSE REPORTING SCREEN**

There has been an expansion to the FY2008 Procurement Card program as well as a revision to the expense reporting. This expansion will allow cardholders to purchase using multiple funding sources including objects codes, 100, 300, and 400. There is a new P-card Expense Reporting Screen. On a monthly basis, each cardholder must review detailed P-card expense reports; confirm the validity of the charge; and, assign the correct funding source and object code/expense type. This application will be a stand-alone application that will be accessed by entering some of the digits of the cardholder's Social Security Number from the application and the last 6-digits of the P-Card. Cardholders will also be able to link to this application from within the Portal P-card application. There will be a link on DFO's website to allow non-FAMIS cardholders access to this application. As the entries are submitted DFO and the Division of Budget Operations and Review will journalize expenses to the proper object codes.

We are anxious for you to make suggestions for improvements or call attention to a particular concern. If you would like to make comments please contact the individual named below.

The Division of Financial Operations (DFO) is ready to give group training in order to assist field personnel in understanding the many benefits of using this system. If you are interested, please contact your ISC. Central users should contact:

Scott Matluck, Deputy Administrator – Payables Administration  
Division of Financial Operations  
65 Court Street  
Room 1001  
Brooklyn, NY 11201  
(718) 935-2850  
SMatluc@schools.nyc.gov

## II. LOGGING ON and HOME PAGE

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Do the following if you do **NOT** have a FAMIS ID and PASSWORD:

**Schools:** Make a request to your Integrated Service Center (ISC)  
**Central and ISCs** – Make a request to the Office of Accounting – FAMIS Security at 718-935-3525 or email [FAMIS@schools.nyc.gov](mailto:FAMIS@schools.nyc.gov)

### LOGIN SCREEN

Please [CLICK HERE](#) to access this screen or go directly to the FAMIS Portal by clicking on this link: <https://dfoforms.nycenet.edu/FamisPortal>

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### SCREEN 1 - LOGIN

**FAMIS** 11/6/2007 8:57:00 AM  
Mayor's Office | DOE | DFO | Portal News

User ID  
**User ID goes here**

Password  
**Password goes here**

Sign In Change Password

**Click "Sign In"  
Screen 1 will open**

What's New? | Send Feedback | Contact Us | Version 2.4

# III. SCREENS

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## SCREEN 2 - WELCOME

NYC Department of Education  
Joel I. Klein, Chancellor

Mayor's Office | DOE | DOE Email | Personnel Directory

Welcome, **YOUR NAME HERE** [Edit Profile](#) | [Sign Out](#)

11/5/2007 11:43:57 AM

**FAMIS NEWS**

Note the FOUR (4) areas to the LEFT. The DOWN arrow next to each section indicates that there are additional options.

Click the DOWN arrow to display each section

Screen 2 shows the sub-parts to "Purchasing and Payments."

**Doc Status**

- Posted: 0
- Awaiting Approval: 0
- Failed: 0
- Marked For Deletion: 0

**Approval**

- Approval: 0
- Rejected: 0

**Cert Of Delivery**

- Paid But Uncertified: 7
- Payment Pending Certification: 0
- Total Uncertified PO's: 11+

**Other Links**

- FY07 Close Calendar
- School Procurement Invoicing
- W-9
- DFO
- Purchasing News
- DOE Home
- Vendor Events Calendar
- Portal News
- Students
- Parents
- Teachers
- Districts/Schools
- Statistical Summaries
- Add More Links

What's New? | [Send Feedback](#) | [Contact Us](#) | Version 2.4

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# SCREEN 3 – EDIT PROFILE & CATEGORY TRANSACTIONS

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NYC Department of Education  
Joel I. Klein, Chancellor

Mayor's Office | DOE | DOE Email | Personnel Directory

Welcome, **John Smith** [Edit Profile](#) [Sign Out](#)

12/5/2007 2:04:34 PM

**FAMIS NEWS**

Click here to keep your contact information up to date as well as to select default addresses to reduce data entry in the purchasing module. (See Screen A)

\*\*\*\* Famis News \*\*\*\*

12/04: Please Continue To Certify Delivery. If You Have Any Questions Contact Your Isc.

\*\*\*\*\*  
\* Fy2008 (Dec) 12 2007 For Input, 06 2008 (Fiscal Period) For Inquiry  
\* Fy2007 13 2007 For Input And Inquiry  
\* Famis@Schools.Nyc.Gov For Assistance  
\*\*\*\*\*

Please Click On The Broadcast Message On The Left Side For Detail Broadcast Message.

Each option below can be clicked to drill-down to see the respective transactions in each category.

**Doc Status**

- Posted: 0
- Awaiting Approval: 0
- Failed: 0
- Marked For Deletion: 0

**Approval**

- Approval: 0
- Rejected: 0

**Cert Of Delivery**

- [Paid But Uncertified: 7](#)
- Payment Pending Certification: 0
- [Total Uncertified PO's: 11+](#)

**Other Links**

- FY07 Close Calendar
- School Procurement Invoicing
- W-9
- DFO
- Purchasing News
- DOE Home
- Portal News
- Students
- Parents
- Teachers
- Districts/Schools
- Statistical Summaries
- Add More Links

**Time**

What's New? | Send Feedback | Contact Us | Version 2.4

# SCREEN 4 – EDIT PROFILE SCREEN

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UserOptions -- Web Page Dialog

**User Information** | **Portal Options**

**OPTIONS**

- Portal Menu
- Default PO Address Book
- Favorite Links
- Time

9

# III. SCREENS

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## PURCHASING/PAYMENTS Screens

### PURCHASING/PAYMENTS SCREENS

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NYC Department of Education  
Joel I. Klein, Chancellor

Mayor's Office | DOE | DOE Email | Personnel Directory

Welcome: YOUR NAME HERE [Edit Profile](#) | [Sign Out](#)

11/5/2007 11:43:57 AM

**Purchasing / Payments**

- Adjustments & Payments
- Asian Library Ordering
- Cert. Of Delivery
- Courier: Special Delivery
- M. S. Intervention Order
- Non-list Requisition
- PA/PTA Grant Program
- Pre-encumbrance
- Procurement Card
- Purchasing
- Report Card Ordering
- SIPP
- Wilson Ordering
- Voucher

**Approval**

**Inquiry**

**Miscellaneous**

**FAMIS NEWS**

Note that the arrow to the LEFT of the section is now pointing UP.  
All of the subsections to "Purchasing and Payments" are now open.

Hold your mouse over the BLUE BUTTON to the LEFT of each subsection.  
A brief explanation ("mouse over") of that subsection appears. Now click on the subsection.  
A new screen will open.

From each of these screens you may proceed to enter appropriate information.

Please look at the following screens:

**MOUSE OVER EXPLANATIONS:**  
5, 7, 9, 11, 13, 15, 17, 19, 21, 23, 25

**SUBSECTION SCREENS:**  
6, 8, 10, 12, 14, 16, 18, 20, 22, 24, 26

**Doc Status**

- Posted: 0
- Awaiting Approval: 0
- Failed: 0
- Marked For Deletion: 0

**Approval**

- Approval: 0
- Rejected: 0

**Cert Of Delivery**

- Paid But Uncertified: 7**
- Payment Pending Certification: 0
- Total Uncertified PO's: 11+**

**Other Links**

- FY07 Close Calendar
- School Procurement Invoicing
- W-9
- DFO
- Purchasing News
- DOE Home
- Vendor Events Calendar
- Portal News
- Students
- Parents
- Teachers
- Districts/Schools
- Statistical Summaries
- Add More Links

**Time**

What's New? | Send Feedback | Contact Us | Version: 2.4

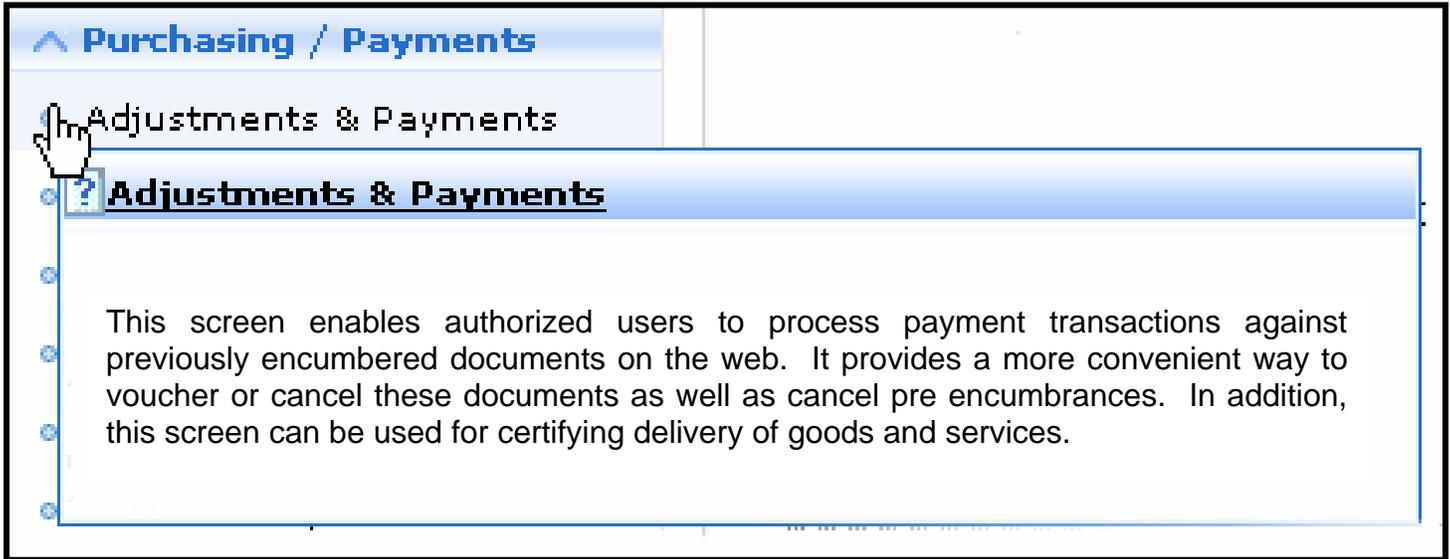
#### Note:

The **ODD** numbers are the  
Mouse Over Screens.

The **EVEN** numbers are the  
Subsection Screens for the  
Respective Mouse Over.

## SCREEN 5 – ADJUSTMENTS AND PAYMENTS – MOUSE OVER

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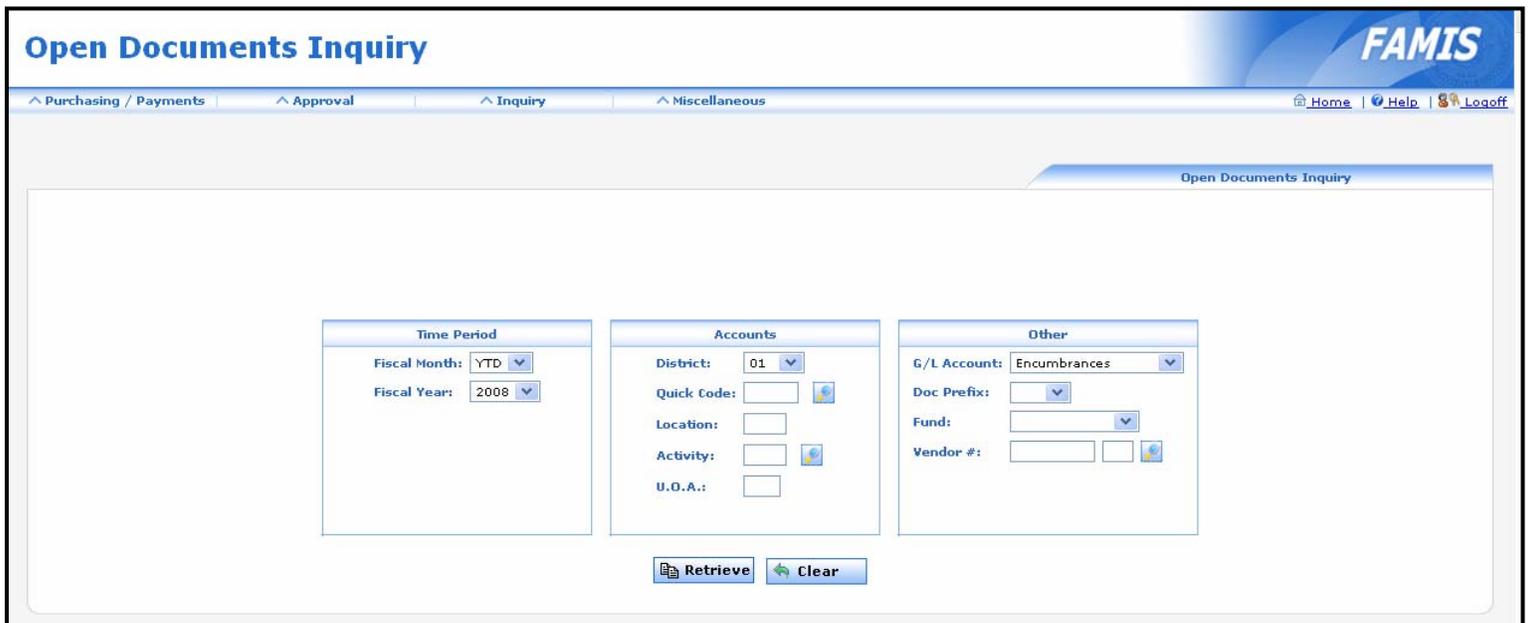


**Adjustments & Payments**

This screen enables authorized users to process payment transactions against previously encumbered documents on the web. It provides a more convenient way to voucher or cancel these documents as well as cancel pre encumbrances. In addition, this screen can be used for certifying delivery of goods and services.

## SCREEN 6 – OPEN DOCUMENT INQUIRY

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**Open Documents Inquiry**

**Time Period**

Fiscal Month: YTD  
Fiscal Year: 2008

**Accounts**

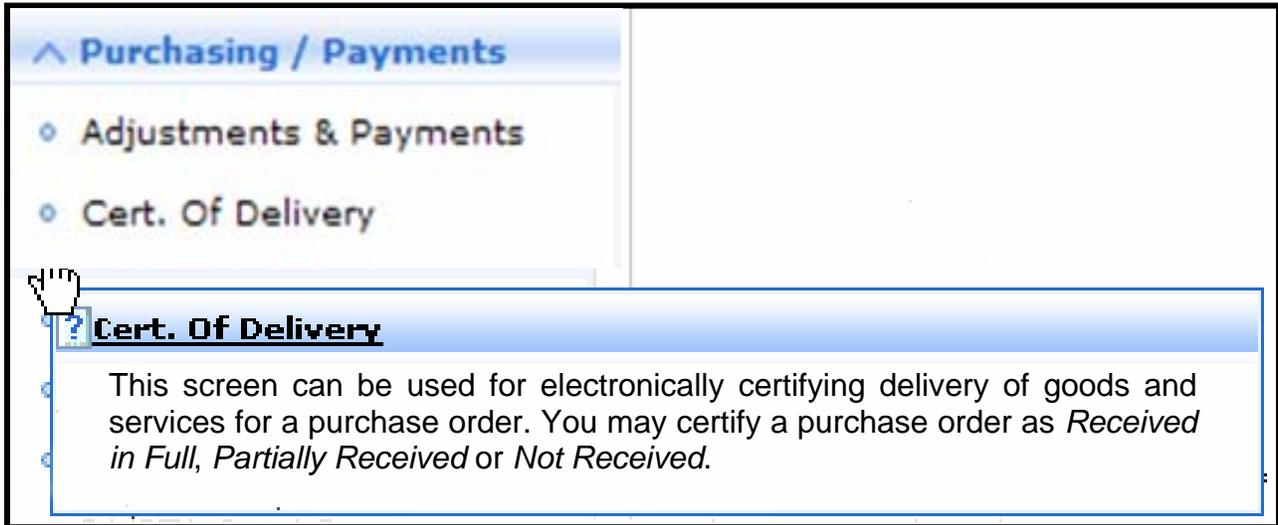
District: 01  
Quick Code:   
Location:   
Activity:   
U.O.A.:

**Other**

G/L Account: Encumbrances  
Doc Prefix:   
Fund:   
Vendor #:

## SCREEN 7– CERTIFICATION OF DELIVERY – MOUSE OVER

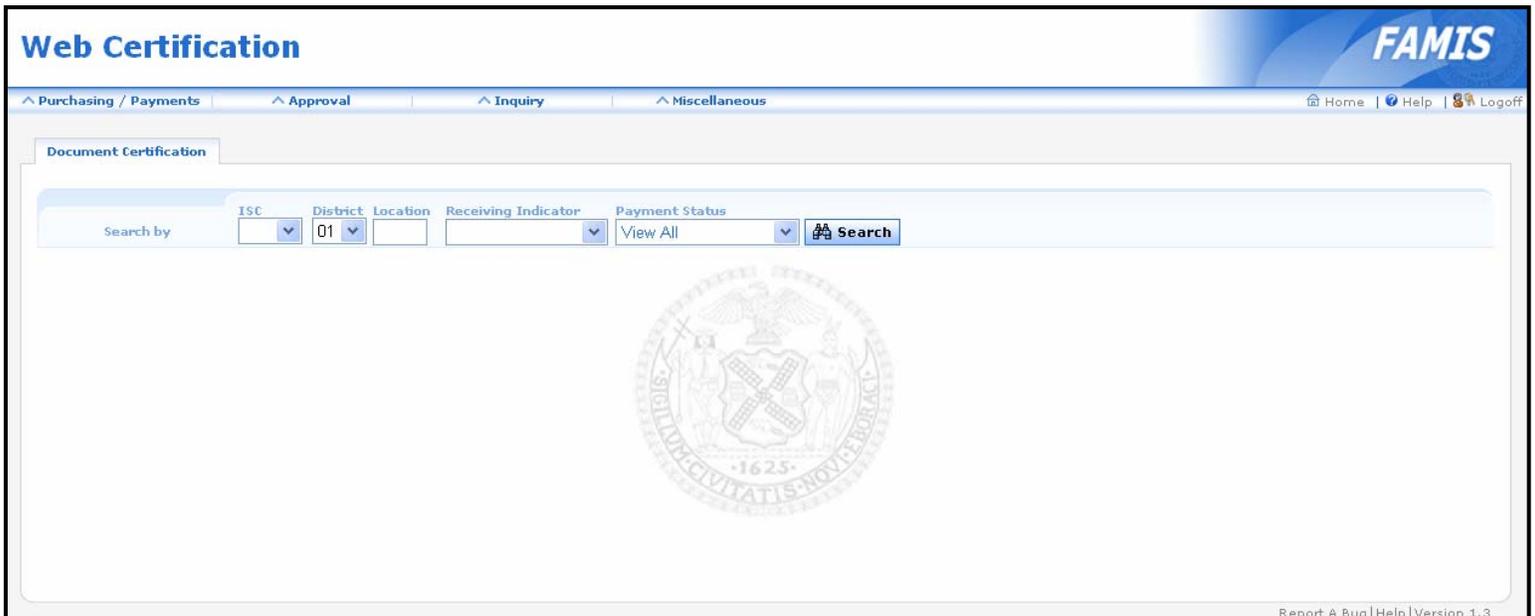
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The screenshot shows a tooltip for the 'Cert. Of Delivery' menu item. The tooltip has a blue header with a question mark icon and the text 'Cert. Of Delivery'. Below the header, the text reads: 'This screen can be used for electronically certifying delivery of goods and services for a purchase order. You may certify a purchase order as *Received in Full*, *Partially Received* or *Not Received*.'

## SCREEN 8– WEB CERTIFICATION

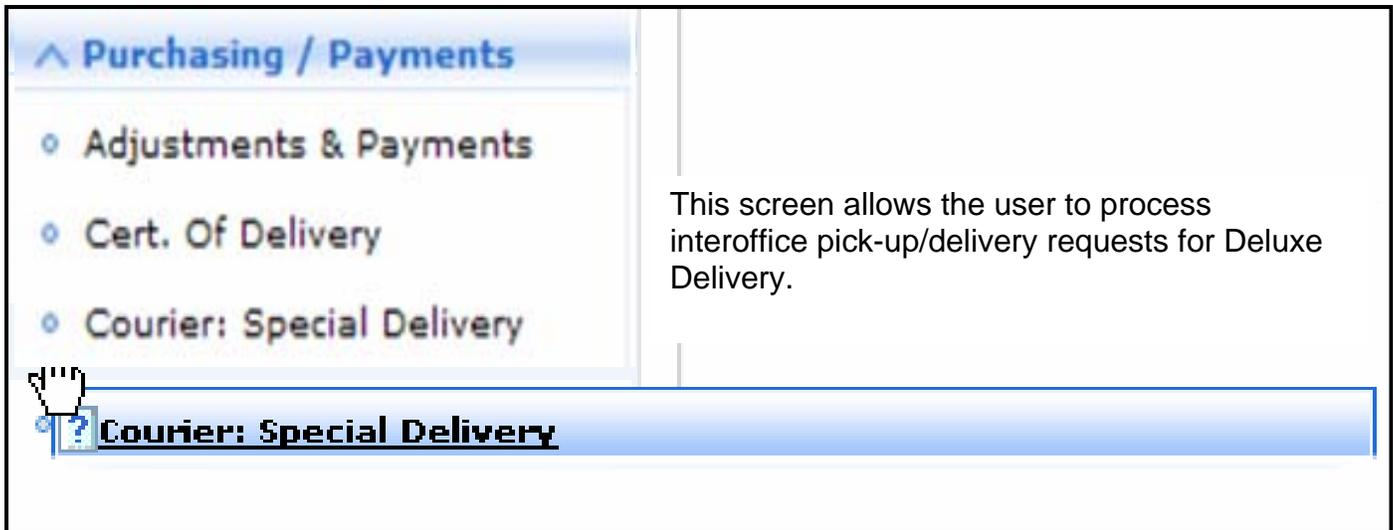
[Go Back to Table of Contents](#)



The screenshot shows the 'Web Certification' screen in the FAMIS system. The page title is 'Web Certification' and the FAMIS logo is in the top right corner. The navigation bar includes 'Purchasing / Payments', 'Approval', 'Inquiry', and 'Miscellaneous'. The main content area is titled 'Document Certification' and features a search bar with the following fields: 'Search by', 'ISC' (dropdown), 'District' (dropdown with '01'), 'Location' (text input), 'Receiving Indicator' (dropdown), 'Payment Status' (dropdown with 'View All'), and a 'Search' button. A large, faint watermark of the University of Wisconsin seal is visible in the center of the page. The footer contains the text 'Report A Bug | Help | Version 1.3'.

## SCREEN 9– COURIER: SPECIAL DELIVERY – MOUSE OVER

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^ Purchasing / Payments

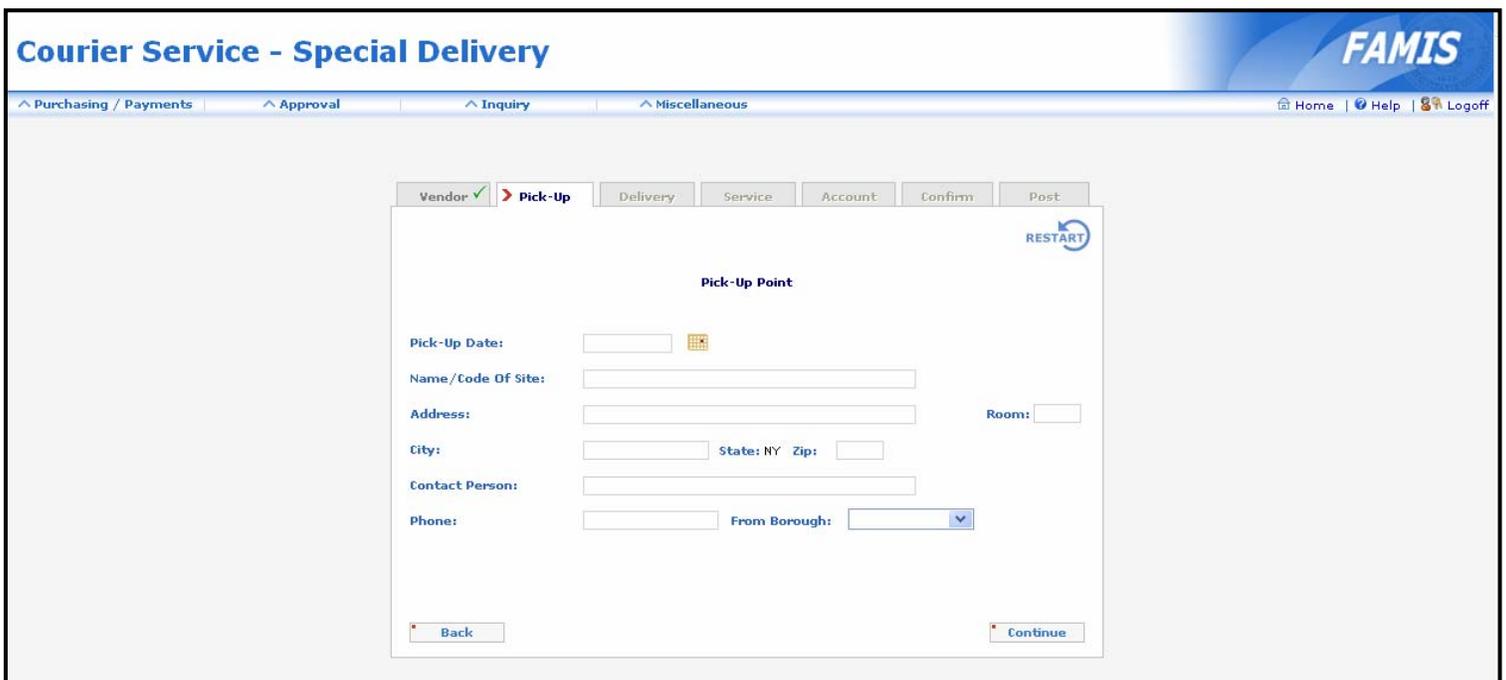
- o Adjustments & Payments
- o Cert. Of Delivery
- o Courier: Special Delivery

This screen allows the user to process interoffice pick-up/delivery requests for Deluxe Delivery.

**Courier: Special Delivery**

## SCREEN 10– COURIER: SPECIAL SERVICE SPECIAL DELIVERY

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**Courier Service - Special Delivery** **FAMIS**

^ Purchasing / Payments | ^ Approval | ^ Inquiry | ^ Miscellaneous | Home | Help | Logoff

Vendor ✓ > **Pick-Up** | Delivery | Service | Account | Confirm | Post

**Pick-Up Point** RESTART

Pick-Up Date:  

Name/Code Of Site:

Address:  Room:

City:  State: NY Zip:

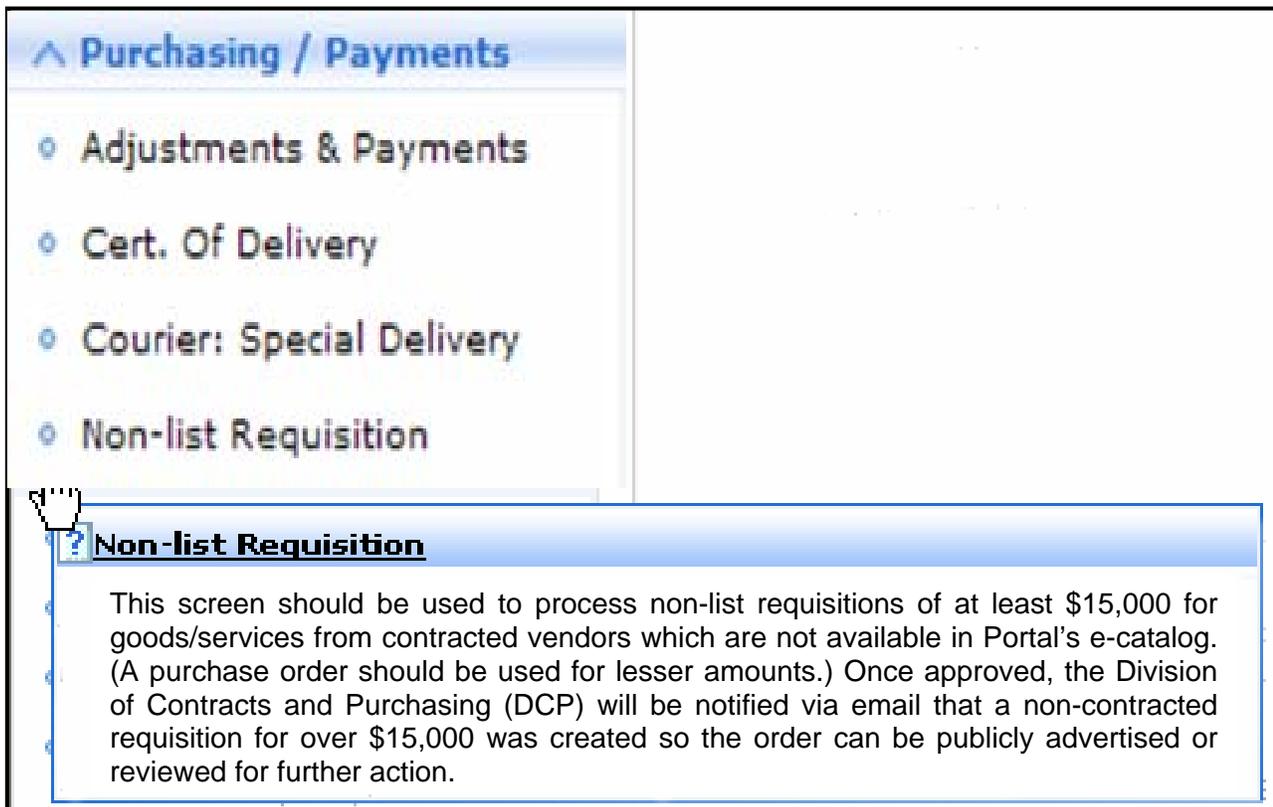
Contact Person:

Phone:  From Borough:

Back Continue

## SCREEN 11– NON LIST REQUISITION – MOUSE OVER

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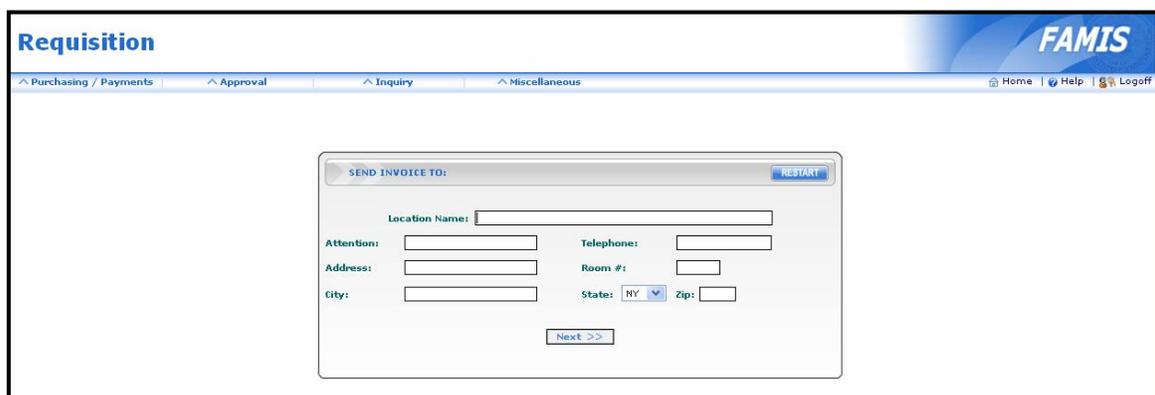
The screenshot shows a web application interface. On the left, a navigation menu is expanded to show 'Purchasing / Payments' with a sub-menu containing: 'Adjustments & Payments', 'Cert. Of Delivery', 'Courier: Special Delivery', and 'Non-list Requisition'. A mouse cursor is hovering over 'Non-list Requisition', which has triggered a tooltip. The tooltip has a blue header with a question mark icon and the text 'Non-list Requisition'. The main content of the tooltip is a paragraph of text explaining the purpose of the screen.

**Non-list Requisition**

This screen should be used to process non-list requisitions of at least \$15,000 for goods/services from contracted vendors which are not available in Portal's e-catalog. (A purchase order should be used for lesser amounts.) Once approved, the Division of Contracts and Purchasing (DCP) will be notified via email that a non-contracted requisition for over \$15,000 was created so the order can be publicly advertised or reviewed for further action.

## SCREEN 12–REQUISITION

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The screenshot shows the 'Requisition' form in the FAMIS system. The page title is 'Requisition' and the FAMIS logo is in the top right. The navigation bar includes 'Purchasing / Payments', 'Approval', 'Inquiry', and 'Miscellaneous'. The form is titled 'SEND INVOICE TO:' and includes a 'RESTART' button. The form fields are: 'Location Name', 'Attention', 'Address', 'City', 'Telephone', 'Room #', 'State' (a dropdown menu currently set to 'NY'), and 'Zip'. A 'Next >>' button is located at the bottom of the form.

**Requisition** FAMIS

^ Purchasing / Payments   ^ Approval   ^ Inquiry   ^ Miscellaneous   Home | Help | Logoff

SEND INVOICE TO: RESTART

Location Name:

Attention:  Telephone:

Address:  Room #:

City:  State: NY  Zip:

Next >>

## SCREEN 13-PA/PTA GRANT PROGRAM - MOUSE OVER

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The screenshot shows a navigation menu with the following items:

- ^ Purchasing / Payments
  - ◊ Adjustments & Payments
  - ◊ Cert. Of Delivery
  - ◊ Courier: Special Delivery
  - ◊ Non-list Requisition
  - ◊ PA/PTA Grant Program

The 'PA/PTA Grant Program' item is highlighted with a blue tooltip. The tooltip contains the following text:

**PA/PTA Grant Program**

The Department of Education is providing Parent Associations (PAs) and Parent/Teacher Associations (PTAs) with small grants for parent outreach. Outreach is particularly important since PAs/PTAs will play a key role in helping to inform and recruit parents to serve on Community District Education Councils (CDECs) which have replaced Community School Boards. Parents of students currently attending schools in a District will comprise 9 of the 12 members of each Council. Please note that only schools (not programs) with functioning PAs/PTAs are eligible to receive grants and use this application.

## SCREEN 14-PA/PTA GRANT PROGRAM

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The screenshot shows the 'PA/PTA Grant Program' application screen. The top navigation bar includes 'Purchasing / Payments', 'Approval', 'Inquiry', and 'Miscellaneous'. The 'FAMIS' logo is in the top right corner. The main content area displays the following error message:

**PA/PTA GRANT PROGRAM** RESTART

**Access to process the PA/PTA Grant Program is denied.**  
**STATUS: Location code is not in the correct format.**

FAMIS Support: 718.935.5100  
PA/PTA Grant Program: 212.374.2323

## SCREEN 15–PRE-ENCUMBRANCE – MOUSE OVER

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^ Purchasing / Payments

- ◊ Adjustments & Payments
- ◊ Cert. Of Delivery
- ◊ Courier: Special Delivery
- ◊ Non-list Requisition
- ◊ PA/PTA Grant Program
- ◊ Pre-encumbrance

**? Pre-encumbrance**

This screen is used for creating a pre-encumbrance. In addition, you may associate the pre-encumbrance document with a specific vendor.

## SCREEN 16–PRE-ENCUMBRANCE

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**Pre-Encumbrance** FAMIS

^ Purchasing / Payments | ^ Approval | ^ Inquiry | ^ Miscellaneous Home | Help | Logoff

Pre-Encumbrance CHANGE NOTICE

Vendor Information (Optional)

Vendor #:   [Search By Name](#)

Accounting Information

Fiscal Year: 2008

Suffix	District	Quick	Object	Location	Activity	Amount	Override	Balance	Remove
01	01	<input type="text"/>	<input type="checkbox"/>		<input type="button" value="Remove"/>				

Total Amount:

Additional Information (Optional)

## SCREEN 17-PROCUREMENT CARD – MOUSE OVER

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^ Purchasing / Payments

- Adjustments & Payments
- Cert. Of Delivery
- Courier: Special Delivery
- Non-list Requisition
- PA/PTA Grant Program
- Pre-encumbrance
- Procurement Card

**Procurement Card**

This screen allows you to apply for a Procurement Card (P-Card) from JP Morgan as well as acquire supplies from the websites of Staples and School Specialty. Once the application is approved, funds will be encumbered to track the card's activity. The P-Card is an innovative method used to facilitate the purchase of small over-the-counter items. It can also be used for purchases related to theater and museum admission fees for students, and has been expanded to include the purchase of other supplies and materials (i.e., instructional classroom materials, equipment and travel). Moreover, this purchasing method allows schools to procure supplies faster while reducing out-of-pocket expenses related to reimbursements (i.e., SIPP Imprest Fund transactions). Vendors will also benefit by speedier payment.

An enrollment application must be completed in order to participate in the program. Completed school applications will be submitted electronically to the ISC for approval prior to the issuance of the card. The applicant will receive the P-Card directly from DFO's Bureau of Accounts Payable. All cardholders will be required to complete the *P-Card Expense Reporting Screen*, which is available on the Portal as well as the DFO Website. Failure to complete this screen may result in a suspension of the card.

## SCREEN 18-PROCUREMENT CARD

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### Procurement Card

FAMIS

^ Purchasing / Payments | ^ Approval | ^ Inquiry | ^ Miscellaneous | Home | Help | Logoff



Login to Staples | Get Staples ID



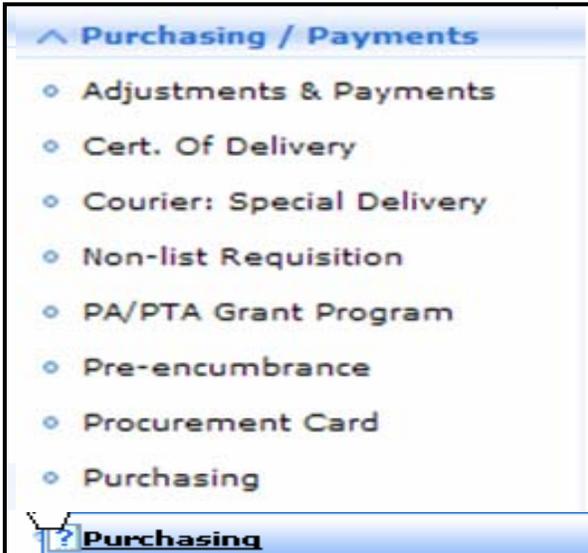
Purchase from School Specialty



Enrollment Application | Adjust P-Card

## SCREEN 19—PURCHASING – MOUSE OVER

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^ Purchasing / Payments

- Adjustments & Payments
- Cert. Of Delivery
- Courier: Special Delivery
- Non-list Requisition
- PA/PTA Grant Program
- Pre-encumbrance
- Procurement Card
- Purchasing

? Purchasing

This screen allows authorized users to create purchase order documents on the web, which would eventually be posted on the mainframe. A Purchase Order may be used to order contracted or non-contracted items directly from the responsive vendor. Before this document is sent to the selected vendor, it must be encumbered into FAMIS. This process ensures that funds are available and reserved to pay the vendor after the goods or services are provided.

Although payment for items ordered via a purchase order should be made after the delivery of goods or services, circumstances may require exceptions to this rule. The purchase of postage, tickets/admissions, and travel are examples of these exceptions.

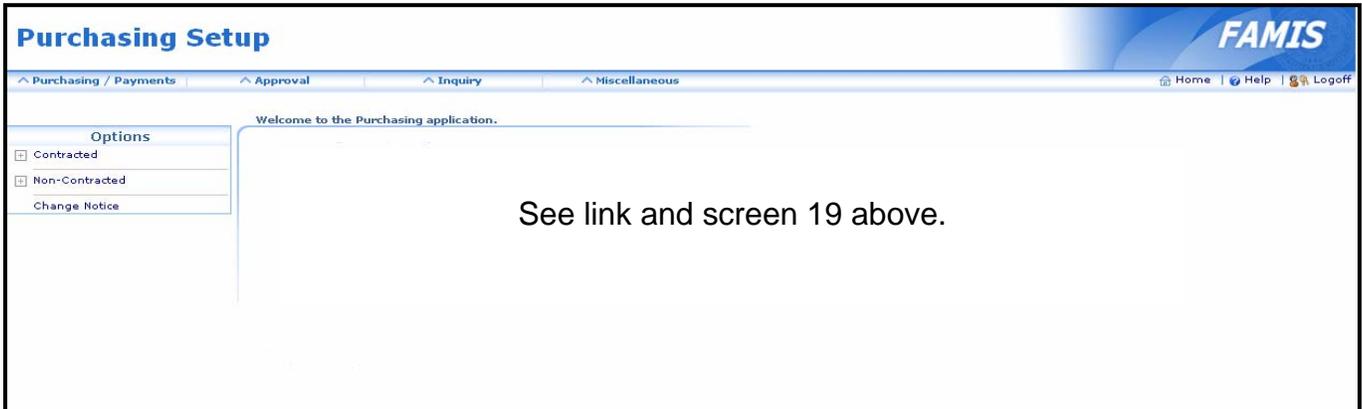
**PURCHASE WITHOUT CONTRACT:**  
\$0 TO \$5000 Approver: Principal or Site Supervisor  
\$5000 to \$15,000 Approver: Principal and ISC  
Over \$15,000 Approver: Principal and ISC (e

**PURCHASE WITH CONTRACT:**  
\$0 TO \$15,000 Approver: Principal or Site Supervisor  
Over \$15,000 Approver: Principal and ISC

For detailed information, please link to:  
<http://schools.nyc.gov/Offices/DCP/FamisforBeginners.pdf>

## SCREEN 20—PURCHASING SETUP

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**Purchasing Setup** FAMIS

^ Purchasing / Payments | ^ Approval | ^ Inquiry | ^ Miscellaneous | Home | Help | Logoff

Welcome to the Purchasing application.

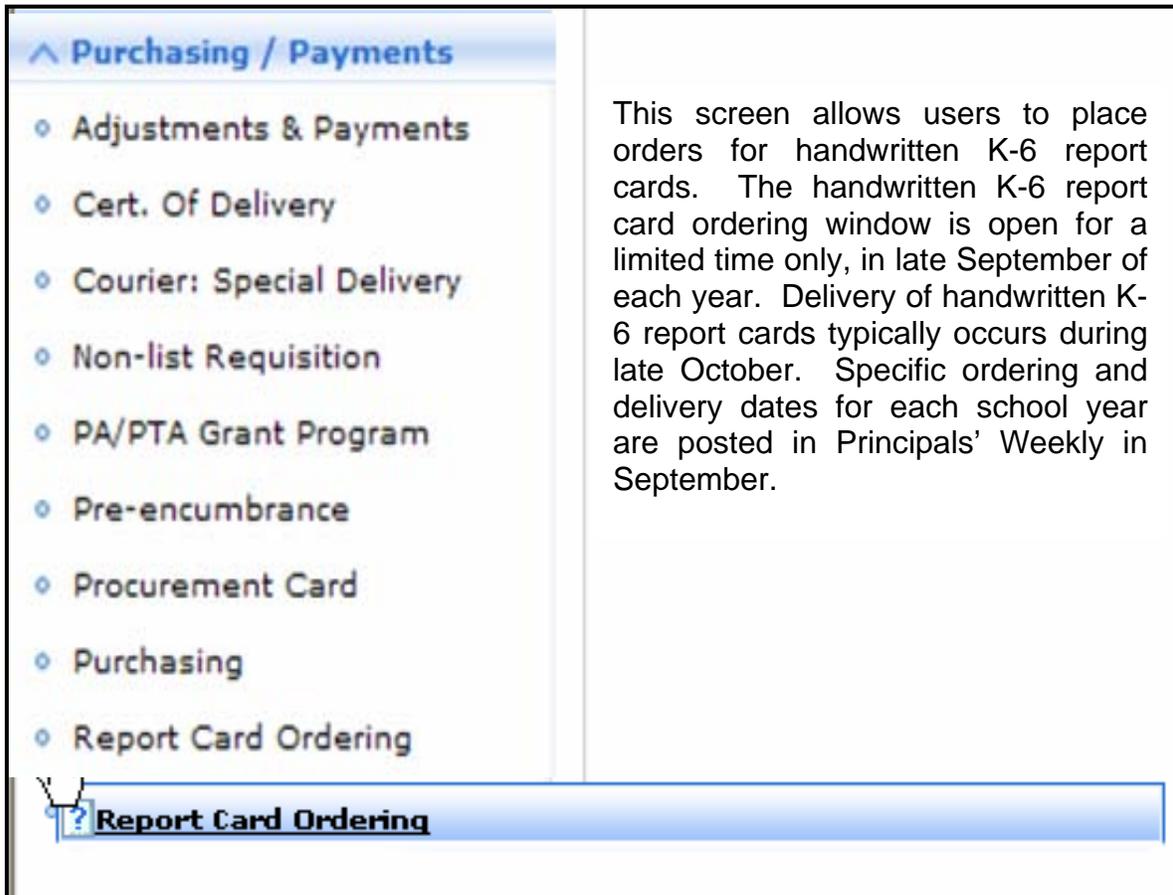
Options

- Contracted
- Non-Contracted
- Change Notice

See link and screen 19 above.

## SCREEN 21-REPORT CARD ORDERING – MOUSE OVER

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^ Purchasing / Payments

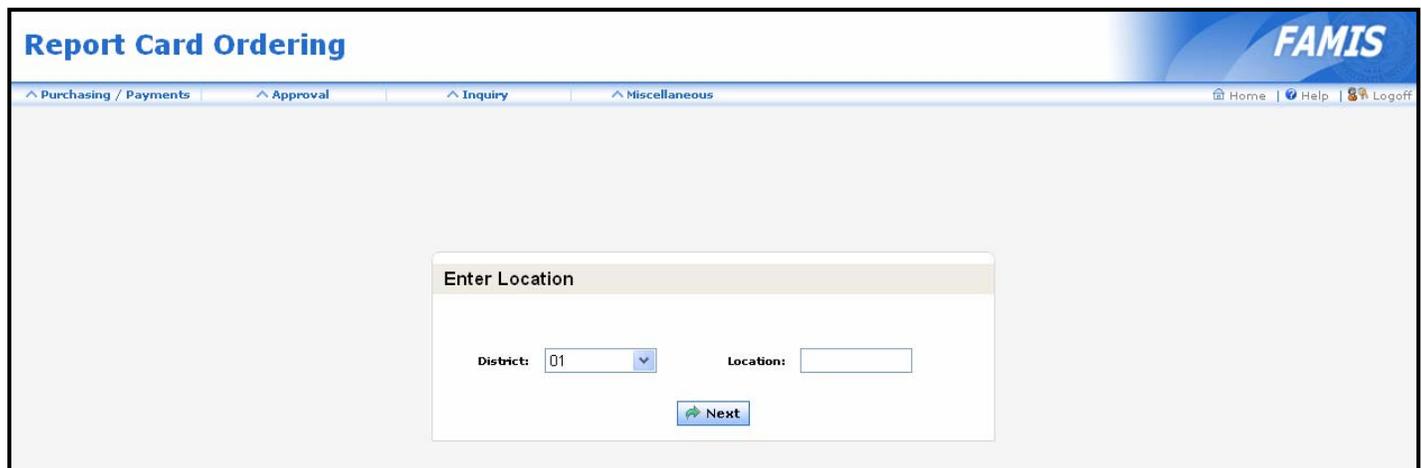
- ◊ Adjustments & Payments
- ◊ Cert. Of Delivery
- ◊ Courier: Special Delivery
- ◊ Non-list Requisition
- ◊ PA/PTA Grant Program
- ◊ Pre-encumbrance
- ◊ Procurement Card
- ◊ Purchasing
- ◊ Report Card Ordering

This screen allows users to place orders for handwritten K-6 report cards. The handwritten K-6 report card ordering window is open for a limited time only, in late September of each year. Delivery of handwritten K-6 report cards typically occurs during late October. Specific ordering and delivery dates for each school year are posted in Principals' Weekly in September.

**Report Card Ordering**

## SCREEN 22-REPORT CARD ORDERING

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**Report Card Ordering** **FAMIS**

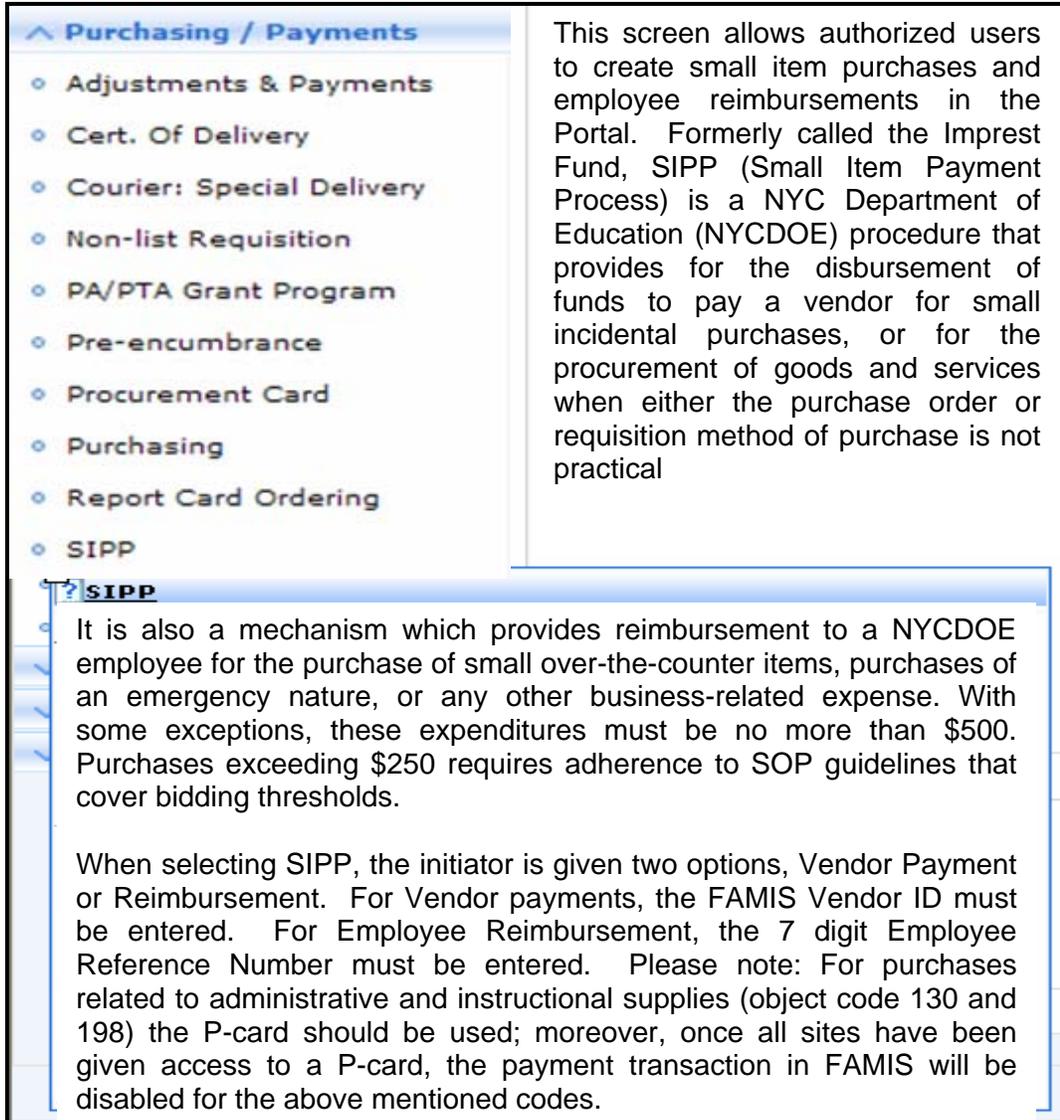
^ Purchasing / Payments   ^ Approval   ^ Inquiry   ^ Miscellaneous   Home | Help | Logoff

**Enter Location**

District:    Location:

## SCREEN 23–SIPP – MOUSE OVER

[Go Back to Table of Contents](#)



The screenshot shows a web application interface. On the left is a navigation menu under the heading "Purchasing / Payments". The menu items are: Adjustments & Payments, Cert. Of Delivery, Courier: Special Delivery, Non-list Requisition, PA/PTA Grant Program, Pre-encumbrance, Procurement Card, Purchasing, Report Card Ordering, and SIPP. The "SIPP" item is highlighted with a blue bar. To the right of the menu is a text box containing a description of the SIPP process. Below the menu, a tooltip for "SIPP" is visible, containing two paragraphs of text.

**Purchasing / Payments**

- Adjustments & Payments
- Cert. Of Delivery
- Courier: Special Delivery
- Non-list Requisition
- PA/PTA Grant Program
- Pre-encumbrance
- Procurement Card
- Purchasing
- Report Card Ordering
- SIPP

This screen allows authorized users to create small item purchases and employee reimbursements in the Portal. Formerly called the Imprest Fund, SIPP (Small Item Payment Process) is a NYC Department of Education (NYCDOE) procedure that provides for the disbursement of funds to pay a vendor for small incidental purchases, or for the procurement of goods and services when either the purchase order or requisition method of purchase is not practical

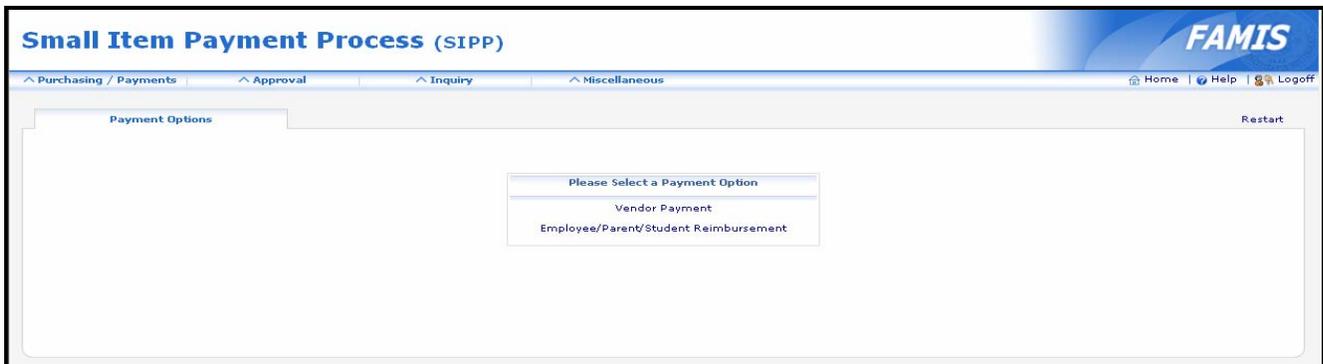
**SIPP**

It is also a mechanism which provides reimbursement to a NYCDOE employee for the purchase of small over-the-counter items, purchases of an emergency nature, or any other business-related expense. With some exceptions, these expenditures must be no more than \$500. Purchases exceeding \$250 requires adherence to SOP guidelines that cover bidding thresholds.

When selecting SIPP, the initiator is given two options, Vendor Payment or Reimbursement. For Vendor payments, the FAMIS Vendor ID must be entered. For Employee Reimbursement, the 7 digit Employee Reference Number must be entered. Please note: For purchases related to administrative and instructional supplies (object code 130 and 198) the P-card should be used; moreover, once all sites have been given access to a P-card, the payment transaction in FAMIS will be disabled for the above mentioned codes.

## SCREEN 24–SIPP

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The screenshot shows the "Small Item Payment Process (SIPP)" screen in the FAMIS system. The page has a blue header with the FAMIS logo and navigation links for Home, Help, and Logoff. Below the header is a breadcrumb trail: Purchasing / Payments > Approval > Inquiry > Miscellaneous. The main content area is titled "Payment Options" and contains a form with the prompt "Please Select a Payment Option". The form has two radio button options: "Vendor Payment" and "Employee/Parent/Student Reimbursement". A "Restart" link is located in the top right corner of the form area.

**Small Item Payment Process (SIPP)** FAMIS

Home | Help | Logoff

^ Purchasing / Payments ^ Approval ^ Inquiry ^ Miscellaneous

Payment Options Restart

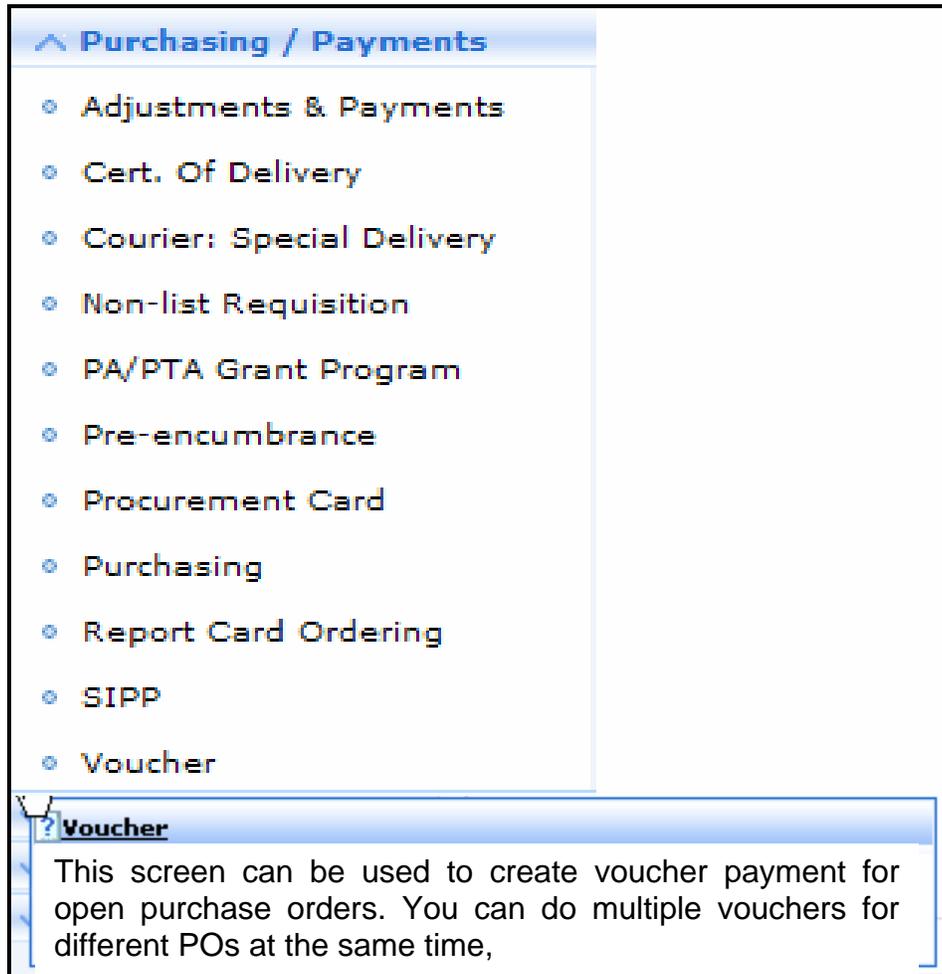
Please Select a Payment Option

Vendor Payment

Employee/Parent/Student Reimbursement

## SCREEN 25– VOUCHER – MOUSE OVER

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The screenshot shows a web application menu. The top-level menu item is 'Purchasing / Payments', which is expanded to show a list of sub-items: Adjustments & Payments, Cert. Of Delivery, Courier: Special Delivery, Non-list Requisition, PA/PTA Grant Program, Pre-encumbrance, Procurement Card, Purchasing, Report Card Ordering, SIPP, and Voucher. The 'Voucher' item is highlighted with a blue bar. Below the menu, a tooltip for 'Voucher' is displayed, containing the text: 'This screen can be used to create voucher payment for open purchase orders. You can do multiple vouchers for different POs at the same time,'

## SCREEN 26– PO VOUCHER

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The screenshot shows the 'PO Voucher' screen in the FAMIS system. The page title is 'PO Voucher'. The navigation bar includes 'Purchasing / Payments', 'Approval', 'Inquiry', and 'Miscellaneous'. The top right corner features the 'FAMIS' logo and links for 'Home', 'Help', and 'Logoff'. The main content area contains a search form with the label 'Purchase Order #' and a 'Retrieve' button. A large, faint watermark of the University of Wisconsin-Madison seal is visible in the background. At the bottom right, there are links for 'RESET APPLICATION' and 'HELP'.

# APPROVAL Screens

## APPROVAL SCREENS

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The screenshot displays the NYC Department of Education FAMIS system interface. At the top, the logo for the NYC Department of Education and the FAMIS logo are visible. The navigation bar includes links for Mayor's Office, DOE, DOE Email, and Personnel Directory. A user greeting reads "Welcome, YOUR NAME HERE" with links for "Edit Profile" and "Sign Out". The date and time are shown as "11/5/2007 11:43:57 AM".

The left sidebar contains a menu with categories: Purchasing / Payments, Approval, Inquiry, and Miscellaneous. Under "Approval", there are sub-items: Approval Box, Approval Tracking, and Rejection Box.

The main content area features a "FAMIS NEWS" section with a blue box containing the following text:

The **"Approval"** section on the left has been opened.  
Notice that there are 3 subsections to this section.  
Remember... when you hold the mouse over the blue dot to the left of the subsection a brief explanation of that subsection appears.  
Also, when you click on the subsection, a new screen will open.  
From each of these screens you may proceed to enter appropriate information.  
Please review the following screens.  
The **ODD** number screens represent the Mouse Over:  
27, 29, 31  
The **EVEN** number screens represent that section, which the Mouse Over refers:  
28, 30, 32

Below the news section are three status boxes:

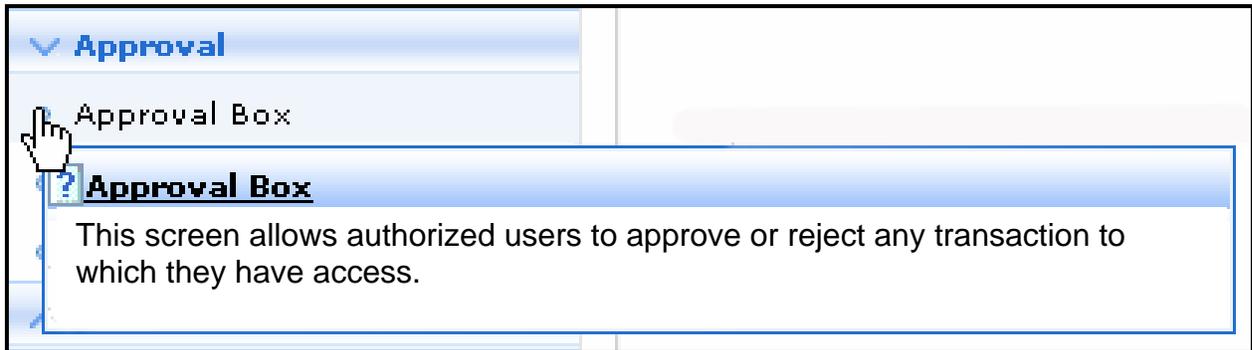
- Doc Status**: Posted: 0, Awaiting Approval: 0, Failed: 0, Marked For Deletion: 0
- Approval**: Approval: 0, Rejected: 0
- Cert Of Delivery**: Paid But Uncertified: 7, Payment Pending Certification: 0, Total Uncertified PO's: 11+

The right sidebar contains "Other Links" such as FY07 Close Calendar, School Procurement Invoicing, W-9, DFO, Purchasing News, DOE Home, Vendor Events Calendar, Portal News, Students, Parents, Teachers, Districts/Schools, Statistical Summaries, and Add More Links. There is also a "Time" section with a clock icon.

At the bottom right, there are links for "What's New?", "Send Feedback", "Contact Us", and "Version: 2.4".

## SCREEN 27– APPROVAL BOX – MOUSE OVER

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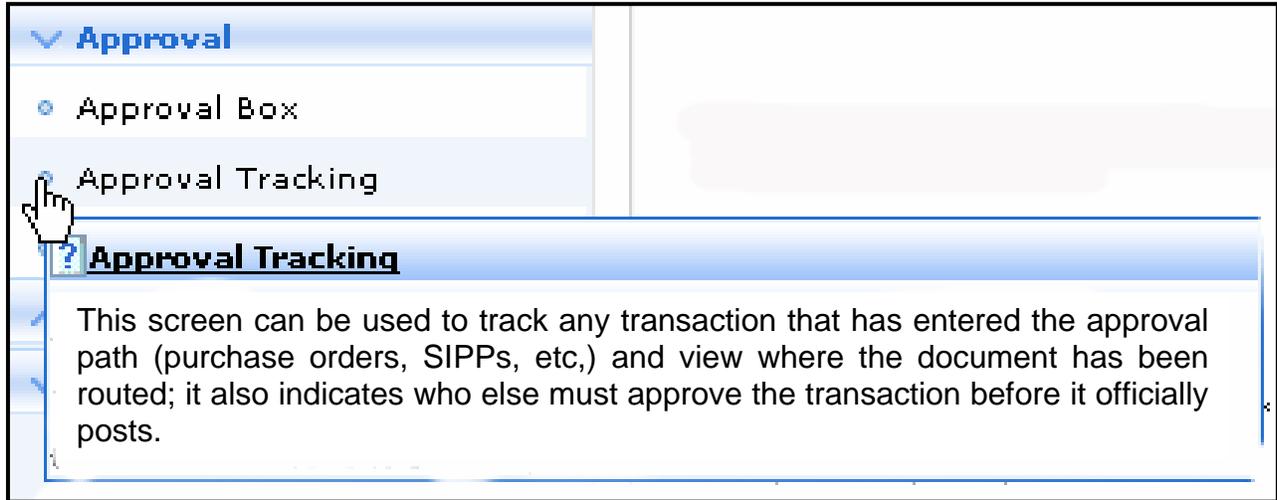
## SCREEN 28– FAMIS APPROVAL BOX

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## SCREEN 29– APPROVAL TRACKING – MOUSE OVER

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The screenshot shows a navigation menu on the left with a blue header 'Approval'. Underneath, there are two items: 'Approval Box' and 'Approval Tracking'. A mouse cursor is hovering over 'Approval Tracking', which has triggered a tooltip. The tooltip has a blue header with a question mark icon and the text 'Approval Tracking'. Below the header, the text reads: 'This screen can be used to track any transaction that has entered the approval path (purchase orders, SIPPs, etc.) and view where the document has been routed; it also indicates who else must approve the transaction before it officially posts.'

## SCREEN 30– DOCUMENT APPROVAL TRACKING

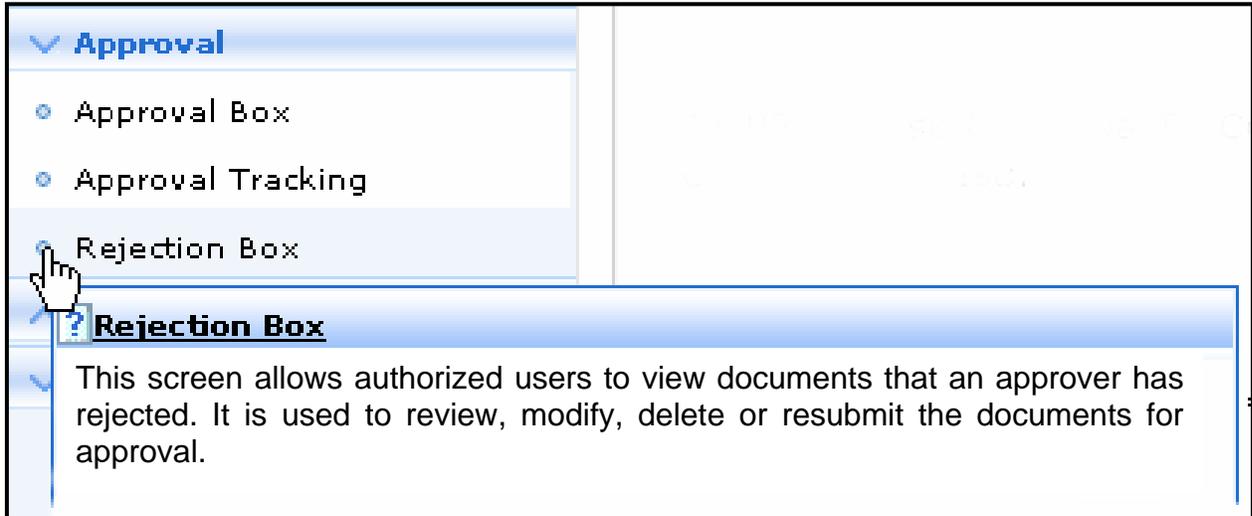
[Go Back to Table of Contents](#)



The screenshot shows the 'Document Approval Tracking' screen in the FAMIS system. The page title is 'Document Approval Tracking' and the FAMIS logo is in the top right corner. The navigation menu includes 'Purchasing / Payments', 'Approval', 'Inquiry', and 'Miscellaneous'. The 'Approval' menu is expanded, showing 'Approval Tracking' as the active item. Below the navigation, there are three tabs: 'Approval Box', 'Rejection Box', and 'Approval Tracking'. The 'Approval Tracking' tab is active. The main content area contains a search form with a 'Document #' field, a 'Go' button, and 'Prior' and 'Next' navigation buttons. A 'Search' button is also present. Below the search form, there is a prompt: 'Enter a document number and click Go.'

## SCREEN 31– REJECTION BOX – MOUSE OVER

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The screenshot shows a web application interface. On the left, there is a navigation menu under the heading 'Approval'. The menu items are 'Approval Box', 'Approval Tracking', and 'Rejection Box'. The 'Rejection Box' item is highlighted in blue, and a mouse cursor is pointing at it. Below the menu, there is a blue banner with a question mark icon and the text 'Rejection Box'. Below the banner, there is a text box containing the following description: 'This screen allows authorized users to view documents that an approver has rejected. It is used to review, modify, delete or resubmit the documents for approval.'

## SCREEN 32– FAMIS REJECTION MAILBOX

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The screenshot shows the 'FAMIS Rejection Mailbox' interface. The title 'FAMIS Rejection Mailbox' is displayed in the top left corner. The 'FAMIS' logo is in the top right corner. Below the title, there is a navigation bar with tabs for 'Purchasing / Payments', 'Approval', 'Inquiry', and 'Miscellaneous'. The 'Approval' tab is selected. In the top right corner of the navigation bar, there are links for 'Home', 'Help', and 'Logoff'. Below the navigation bar, there is a sub-navigation bar with tabs for 'Rejects Mailbox', 'Approval Box', 'Rejection Box', and 'Approval Tracking'. The 'Rejection Box' tab is selected. Below the sub-navigation bar, there is a table with the following columns: 'Doc #', 'Summary', 'Doc Type', 'App Type', 'Notes', 'Item List', 'Changed', 'Created', 'Days Out', 'Reason Code', and 'Rejected By'. The table is currently empty, and the text 'No documents found.' is displayed in the center of the table.

# INQUIRY Screens

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The screenshot displays the FAMIS (Financial Accounting Management Information System) interface for the NYC Department of Education. The header includes the department name, the Chancellor's name (Joel I. Klein), and the date/time (11/5/2007 11:43:57 AM). The user is logged in as 'YOUR NAME HERE' and has access to 'Edit Profile' and 'Sign Out' options.

The main content area features a 'FAMIS NEWS' section with a blue box containing the following text:

The **"Inquiry"** section on the left has been opened.  
Notice that there are 4 subsections to this section.  
Remember... when you hold the mouse over the blue dot to the left of the subsection a brief explanation of that subsection appears.  
Also, when you click on the subsection, a new screen will open. From each of these screens you may proceed to enter appropriate information.  
Please review the following screens.  
The **ODD** number screens represent the Mouse Over: 33, 35, 37, 39  
The **EVEN** number screens represent that section, which the Mouse Over refers: 34, 36, 38, 40

Below the news section are three status boxes:

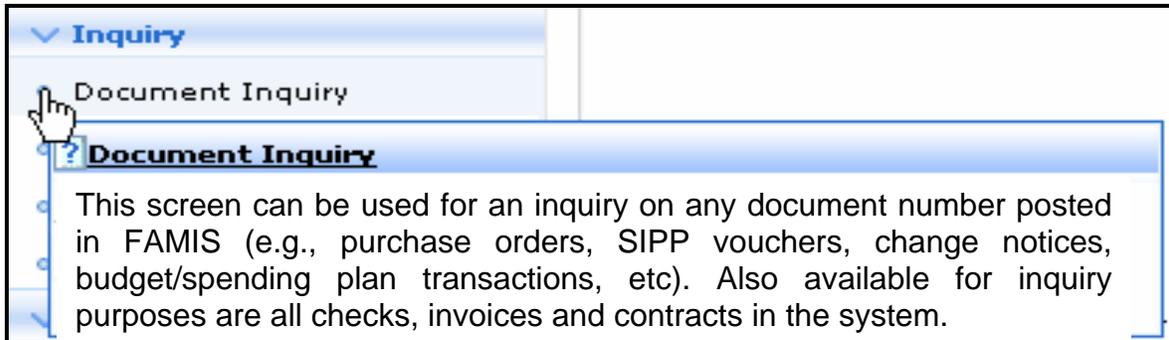
- Doc Status:** Posted: 0, Awaiting Approval: 0, Failed: 0, Marked For Deletion: 0
- Approval:** Approval: 0, Rejected: 0
- Cert Of Delivery:** Paid But Uncertified: 7, Payment Pending Certification: 0, Total Uncertified PO's: 11+

The left sidebar contains a navigation menu with categories: Purchasing / Payments, Approval, Inquiry (with sub-items: Document Inquiry, Open Document Inquiry, Spending Plan Inquiry, Vendor Inquiry), and Miscellaneous. The right sidebar includes 'Other Links' (FY07 Close Calendar, School Procurement Invoicing, W-9, DFO, Purchasing News, DOE Home, Vendor Events Calendar, Portal News, Students, Parents, Teachers, Districts/Schools, Statistical Summaries, Add More Links) and a 'Time' section with a clock icon.

At the bottom right, there is a footer with the text: 'What's New? | Send Feedback | Contact Us | Version 2.4'

## SCREEN 33– DOCUMENT INQUIRY – MOUSE OVER

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Document Inquiry

**Document Inquiry**

This screen can be used for an inquiry on any document number posted in FAMIS (e.g., purchase orders, SIPP vouchers, change notices, budget/spending plan transactions, etc). Also available for inquiry purposes are all checks, invoices and contracts in the system.

## SCREEN 34– DOCUMENT INQUIRY

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**Document Inquiry**


[Purchasing / Payments](#)
[Approval](#)
[Inquiry](#)
[Miscellaneous](#)

[Home](#)
[Help](#)
[Logoff](#)

Document #
 Check #
 Contract #
 Invoice #

Document #:

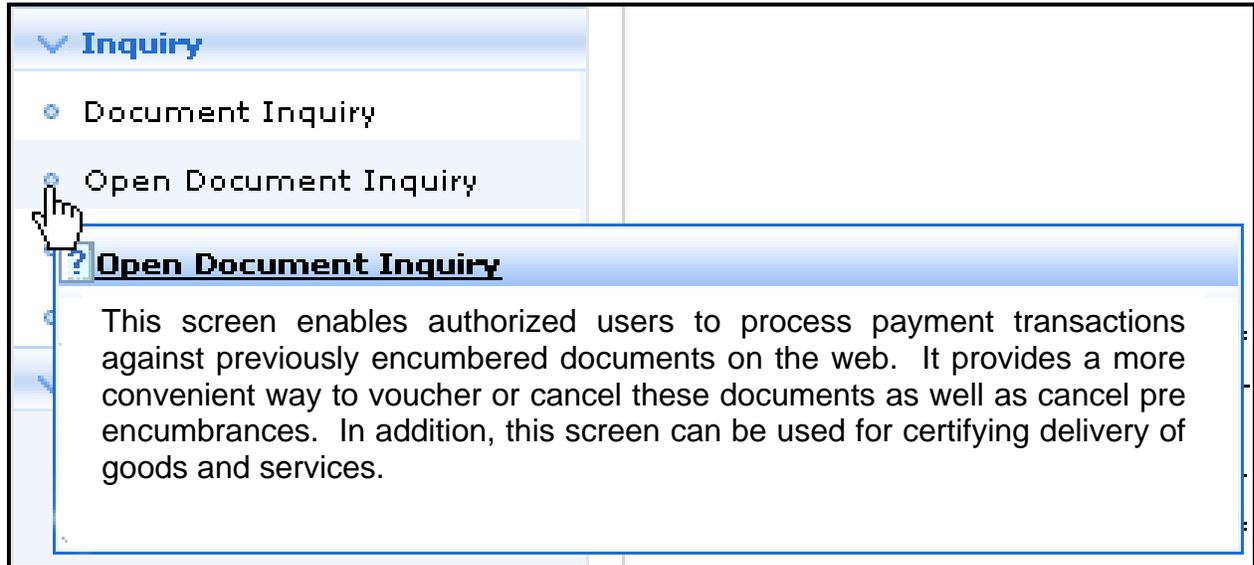
Posted By:	Posted Date:	Posted Time:
Fiscal Year:	Contract #:	Trans Code:
Vendor #:	Vendor Name:	Trans Desc:
Doc Reference:	Check #:	Bank #:
Invoice Date:	Invoice #:	
Quick Code:	Object Code:	Location Code:
Activity Code:	Start Date:	End Date:
Cert. Ind.:	Cert. Amount:	UOA:

View Details | View Summary

	Post Date	Period	T/C	Document No.	Check No.	Bank No.	Due Date	Description	Amount
Original Amt:									\$
Adjustments:									\$
Liquidations:									\$
<b>Balance:</b>									\$
Payments:									\$

## SCREEN 35– OPEN DOCUMENT INQUIRY – MOUSE OVER

[Go Back to Table of Contents](#)

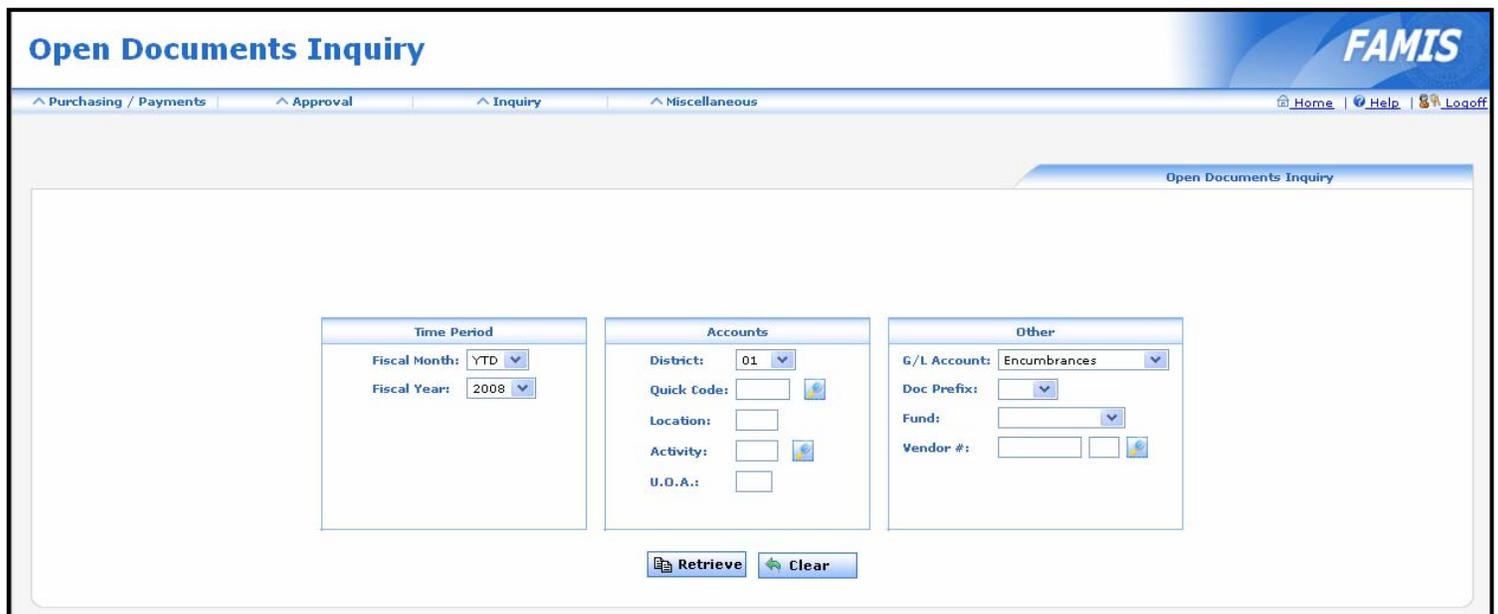


**Open Document Inquiry**

This screen enables authorized users to process payment transactions against previously encumbered documents on the web. It provides a more convenient way to voucher or cancel these documents as well as cancel pre encumbrances. In addition, this screen can be used for certifying delivery of goods and services.

## SCREEN 36– OPEN DOCUMENT INQUIRY

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**Open Documents Inquiry** FAMIS

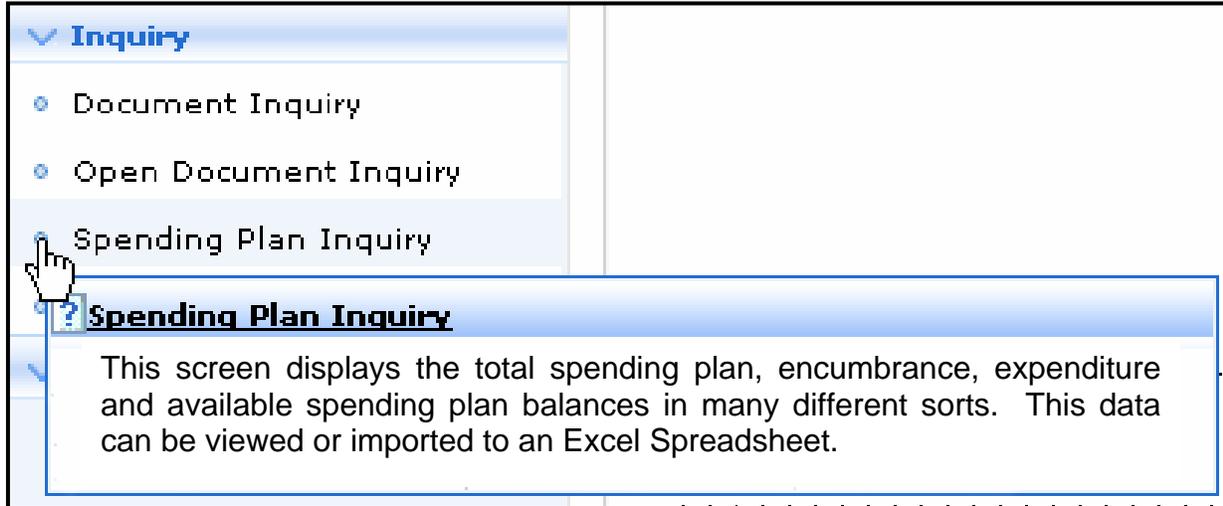
^ Purchasing / Payments   ^ Approval   ^ Inquiry   ^ Miscellaneous   [Home](#) | [Help](#) | [Logoff](#)

Open Documents Inquiry

Time Period	Accounts	Other
Fiscal Month: <input type="text" value="YTD"/>	District: <input type="text" value="01"/>	G/L Account: <input type="text" value="Encumbrances"/>
Fiscal Year: <input type="text" value="2008"/>	Quick Code: <input type="text"/>	Doc Prefix: <input type="text"/>
	Location: <input type="text"/>	Fund: <input type="text"/>
	Activity: <input type="text"/>	Vendor #: <input type="text"/>
	U.O.A.: <input type="text"/>	

## SCREEN 37- SPENDING PLAN INQUIRY – MOUSE OVER

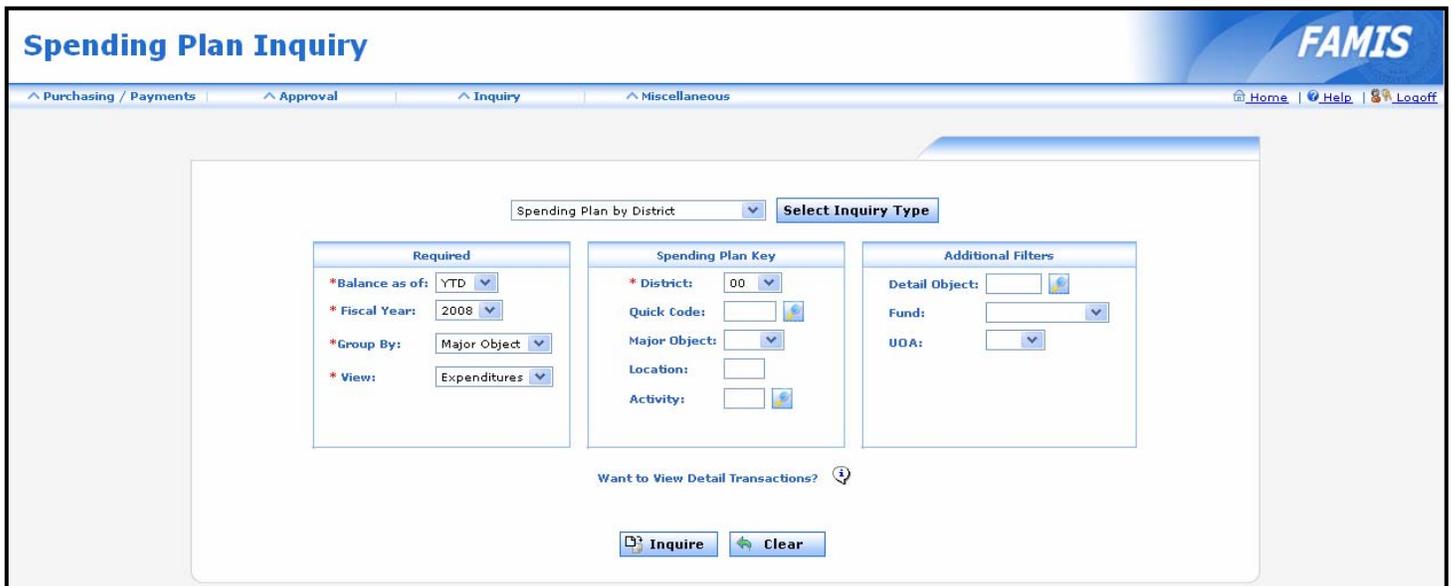
[Go Back to Table of Contents](#)



The screenshot shows a web application interface. On the left, there is a vertical menu under the heading 'Inquiry'. The menu items are: 'Document Inquiry', 'Open Document Inquiry', and 'Spending Plan Inquiry'. A mouse cursor is hovering over 'Spending Plan Inquiry', which has triggered a tooltip. The tooltip has a blue header with a question mark icon and the text 'Spending Plan Inquiry'. Below the header, the tooltip contains the following text: 'This screen displays the total spending plan, encumbrance, expenditure and available spending plan balances in many different sorts. This data can be viewed or imported to an Excel Spreadsheet.'

## SCREEN 38- SPENDING PLAN INQUIRY

[Go Back to Table of Contents](#)



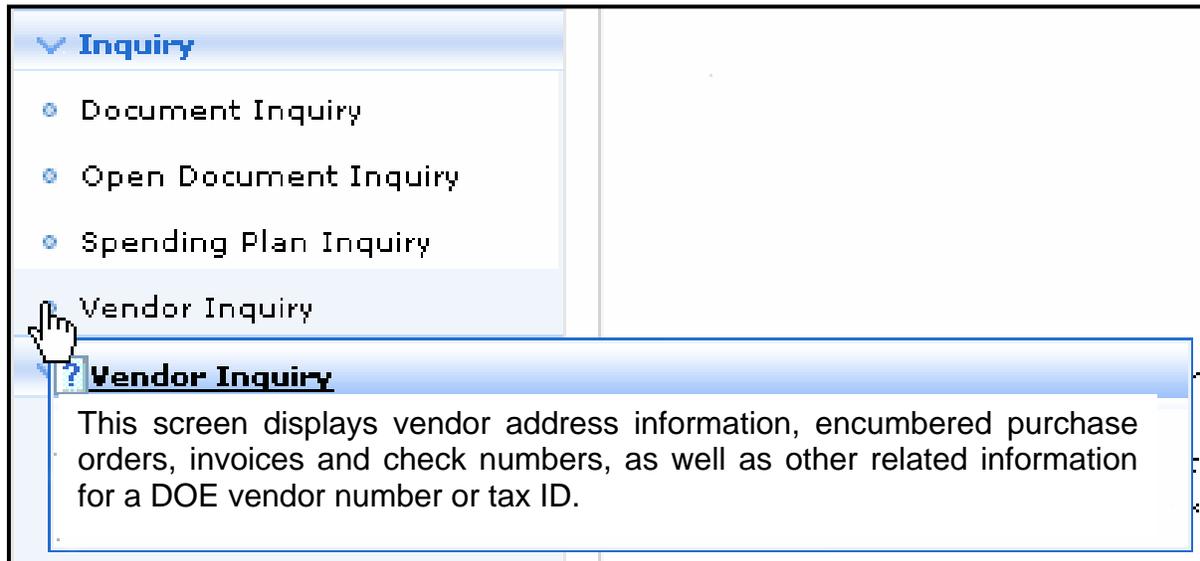
The screenshot shows the 'Spending Plan Inquiry' screen in the FAMIS system. The page title is 'Spending Plan Inquiry' and the FAMIS logo is in the top right corner. The navigation bar includes links for 'Purchasing / Payments', 'Approval', 'Inquiry', and 'Miscellaneous', along with 'Home', 'Help', and 'Logoff' options. The main content area features a search form with the following sections:

- Spending Plan by District:** A dropdown menu.
- Select Inquiry Type:** A button.
- Required:** A section with four fields: '\*Balance as of:' (YTD), '\*Fiscal Year:' (2008), '\*Group By:' (Major Object), and '\*View:' (Expenditures).
- Spending Plan Key:** A section with four fields: '\*District:' (00), 'Quick Code:', 'Major Object:', 'Location:', and 'Activity:'.
- Additional Filters:** A section with three fields: 'Detail Object:', 'Fund:', and 'UOA:'.

Below the form, there is a checkbox labeled 'Want to View Detail Transactions?' and a question mark icon. At the bottom of the form, there are two buttons: 'Inquire' and 'Clear'.

## SCREEN 39- VENDOR INQUIRY – MOUSE OVER

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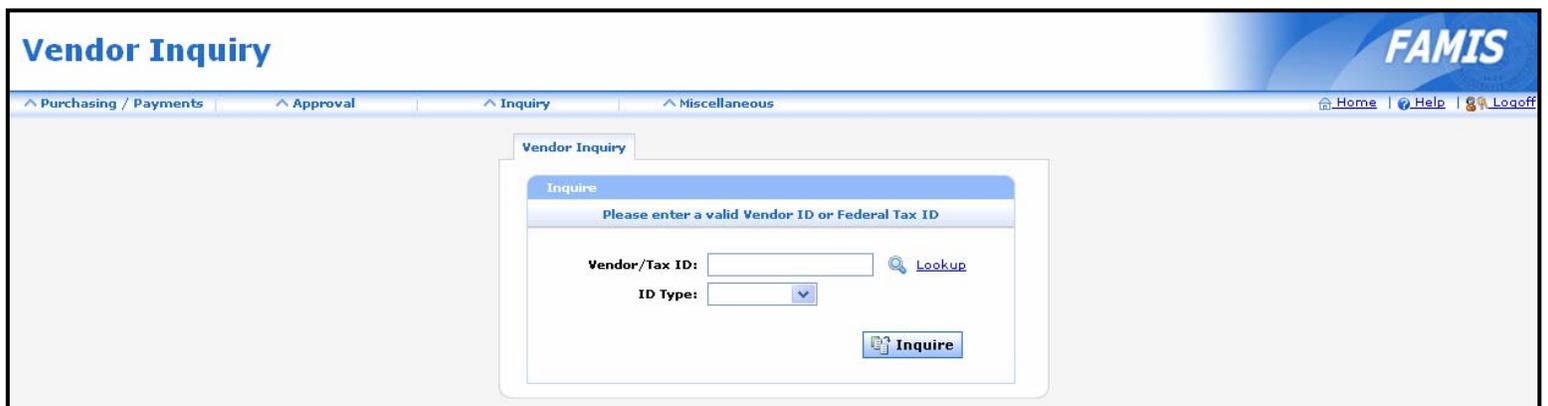
The screenshot shows a navigation menu with a 'Vendor Inquiry' item highlighted. A tooltip is displayed over this item, containing the following text:

**Vendor Inquiry**

This screen displays vendor address information, encumbered purchase orders, invoices and check numbers, as well as other related information for a DOE vendor number or tax ID.

## SCREEN 40- VENDOR INQUIRY

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The screenshot displays the 'Vendor Inquiry' application interface. The page title is 'Vendor Inquiry' and the 'FAMIS' logo is in the top right corner. The navigation bar includes links for 'Purchasing / Payments', 'Approval', 'Inquiry', and 'Miscellaneous', along with 'Home', 'Help', and 'Logoff' options. The main content area features a 'Vendor Inquiry' tab and an 'Inquire' form. The form includes the following elements:

- A header: 'Inquire' and 'Please enter a valid Vendor ID or Federal Tax ID'
- A text input field labeled 'Vendor/Tax ID:' with a 'Lookup' button to its right.
- A dropdown menu labeled 'ID Type:'.
- An 'Inquire' button at the bottom right of the form.

# MISCELLANEOUS SCREENS

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NYC Department of Education  
Joel I. Klein, Chancellor

Mayor's Office | DOE | DOE Email | Personnel Directory

Welcome, **YOUR NAME HERE** [Edit Profile](#) | [Sign Out](#)

11/5/2007 11:43:57 AM

**FAMIS NEWS**

The **"Miscellaneous"** section on the left has been opened.

Notice that there are 6 subsections to this section.

Remember... when you hold the mouse over the blue dot to the left of the subsection a brief explanation of that subsection appears.

Also, when you click on the subsection, a new screen will open.  
From each of these screens you may proceed to enter appropriate information.

Please review the following screens.

The **ODD** number screens represent the Mouse Over:  
41, 43, 45, 47, 49, 51

The **EVEN** number screens represent that section, which the Mouse Over refers:  
42, 44, 46, 48, 50, 52

**Doc Status**

- Posted: 0
- Awaiting Approval: 0
- Failed: 0
- Marked For Deletion: 0

**Approval**

- Approval: 0
- Rejected: 0

**Cert Of Delivery**

- [Paid But Uncertified: 7](#)
- Payment Pending Certification: 0
- [Total Uncertified PO's: 11+](#)

**Other Links**

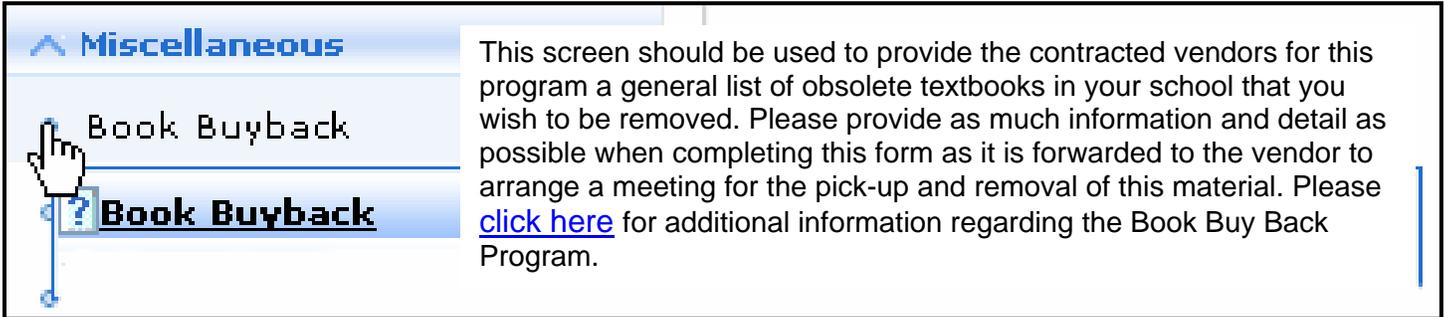
- FY07 Close Calendar
- School Procurement Invoicing
- W-9
- DFO
- Purchasing News
- DOE Home
- Vendor Events Calendar
- Portal News
- Students
- Parents
- Teachers
- Districts/Schools
- Statistical Summaries
- Add More Links

**Time**

What's New? | Send Feedback | Contact Us | Version 2.4

## SCREEN 41- BOOK BUYBACK PROGRAM – MOUSE OVER

[Go Back to Table of Contents](#)



**Miscellaneous**

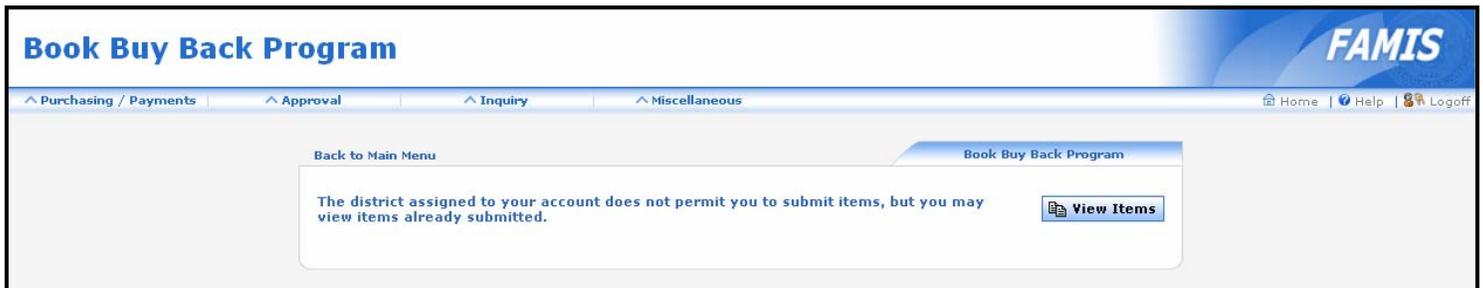
Book Buyback

**Book Buyback**

This screen should be used to provide the contracted vendors for this program a general list of obsolete textbooks in your school that you wish to be removed. Please provide as much information and detail as possible when completing this form as it is forwarded to the vendor to arrange a meeting for the pick-up and removal of this material. Please [click here](#) for additional information regarding the Book Buy Back Program.

## SCREEN 42- BOOK BUYBACK PROGRAM

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**Book Buy Back Program**

**FAMIS**

^ Purchasing / Payments | ^ Approval | ^ Inquiry | ^ Miscellaneous | Home | Help | Logoff

Back to Main Menu

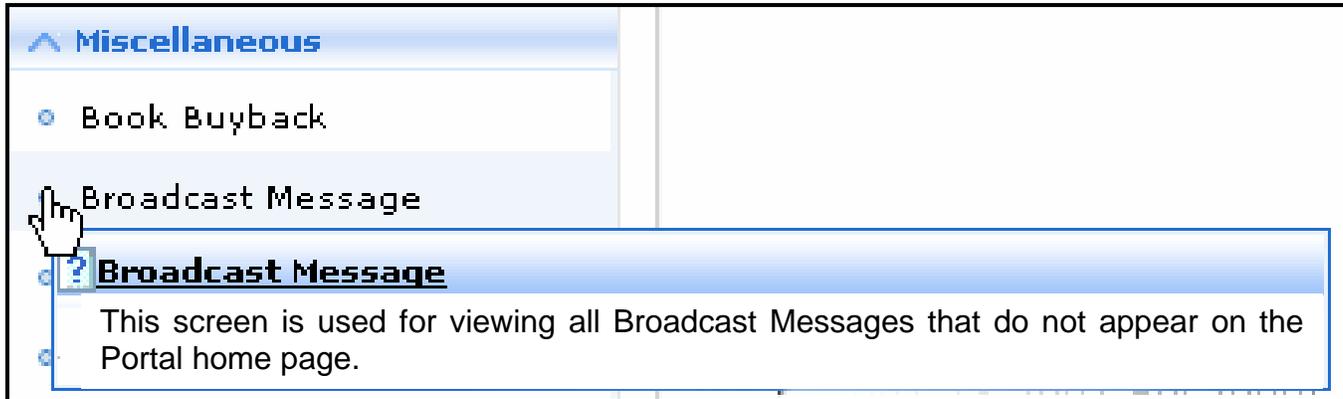
Book Buy Back Program

The district assigned to your account does not permit you to submit items, but you may view items already submitted.

[View Items](#)

## SCREEN 43- BROADCAST MESSAGE – MOUSE OVER

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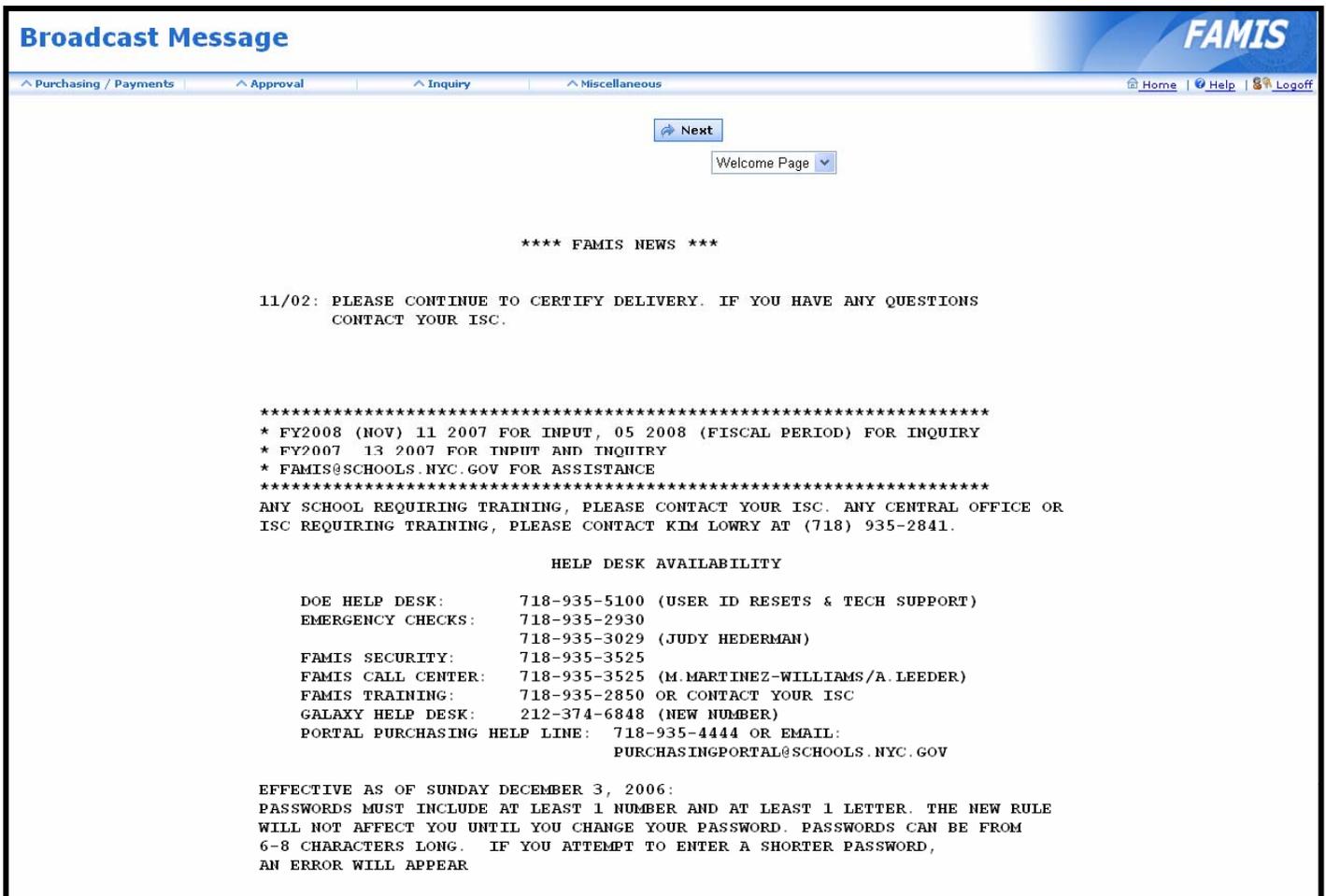
**Miscellaneous**

- Book Buyback
- Broadcast Message**
- Broadcast Message**

This screen is used for viewing all Broadcast Messages that do not appear on the Portal home page.

## SCREEN 44- BROADCAST MESSAGE

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**Broadcast Message** FAMIS

[Purchasing / Payments](#) | [Approval](#) | [Inquiry](#) | [Miscellaneous](#) [Home](#) | [Help](#) | [Logoff](#)

[Next](#)  
Welcome Page ▾

\*\*\*\* FAMIS NEWS \*\*\*

11/02: PLEASE CONTINUE TO CERTIFY DELIVERY. IF YOU HAVE ANY QUESTIONS CONTACT YOUR ISC.

\*\*\*\*\*  
\* FY2008 (NOV) 11 2007 FOR INPUT, 05 2008 (FISCAL PERIOD) FOR INQUIRY  
\* FY2007 13 2007 FOR INPUT AND INQUIRY  
\* FAMIS@SCHOOLS.NYC.GOV FOR ASSISTANCE  
\*\*\*\*\*  
ANY SCHOOL REQUIRING TRAINING, PLEASE CONTACT YOUR ISC. ANY CENTRAL OFFICE OR  
ISC REQUIRING TRAINING, PLEASE CONTACT KIM LOWRY AT (718) 935-2841.

HELP DESK AVAILABILITY

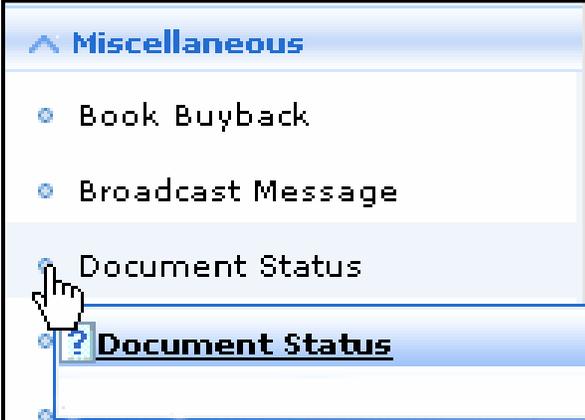
DOE HELP DESK:	718-935-5100 (USER ID RESETS & TECH SUPPORT)
EMERGENCY CHECKS:	718-935-2930
	718-935-3029 (JUDY HEDERMAN)
FAMIS SECURITY:	718-935-3525
FAMIS CALL CENTER:	718-935-3525 (M.MARTINEZ-WILLIAMS/A. LEEDER)
FAMIS TRAINING:	718-935-2850 OR CONTACT YOUR ISC
GALAXY HELP DESK:	212-374-6848 (NEW NUMBER)
PORTAL PURCHASING HELP LINE:	718-935-4444 OR EMAIL: PURCHASINGPORTAL@SCHOOLS.NYC.GOV

EFFECTIVE AS OF SUNDAY DECEMBER 3, 2006:  
PASSWORDS MUST INCLUDE AT LEAST 1 NUMBER AND AT LEAST 1 LETTER. THE NEW RULE  
WILL NOT AFFECT YOU UNTIL YOU CHANGE YOUR PASSWORD. PASSWORDS CAN BE FROM  
6-8 CHARACTERS LONG. IF YOU ATTEMPT TO ENTER A SHORTER PASSWORD,  
AN ERROR WILL APPEAR

This is the section maintained by the Office of Fiscal Affairs of the Department of Education. All important news, items, deadlines, notices, etc. will be discussed in the different chapters. This section is updated daily.

## SCREEN 45- DOCUMENT STATUS – MOUSE OVER

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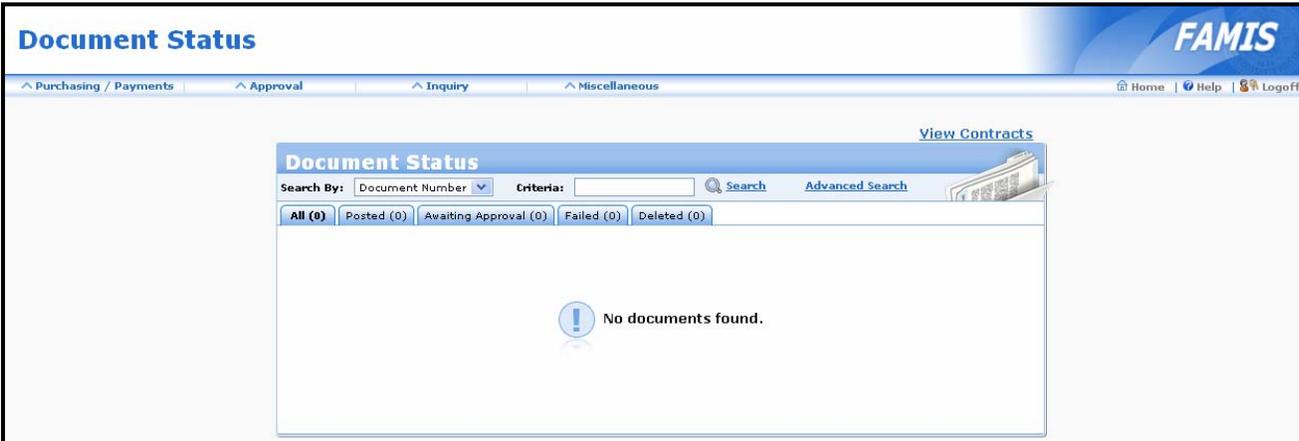
^ Miscellaneous

- Book Buyback
- Broadcast Message
- Document Status
- **Document Status**

This application allows the user to see the status of any document that has been processed in the FAMIS Portal (Successfully Processed, Awaiting Approval, City Rejected, etc.). Additionally, it allows the user to edit or delete documents that have financial errors.

## SCREEN 46- DOCUMENT STATUS

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**Document Status** FAMIS

^ Purchasing / Payments   ^ Approval   ^ Inquiry   ^ Miscellaneous   [Home](#) | [Help](#) | [Logoff](#)

[View Contracts](#)

**Document Status**

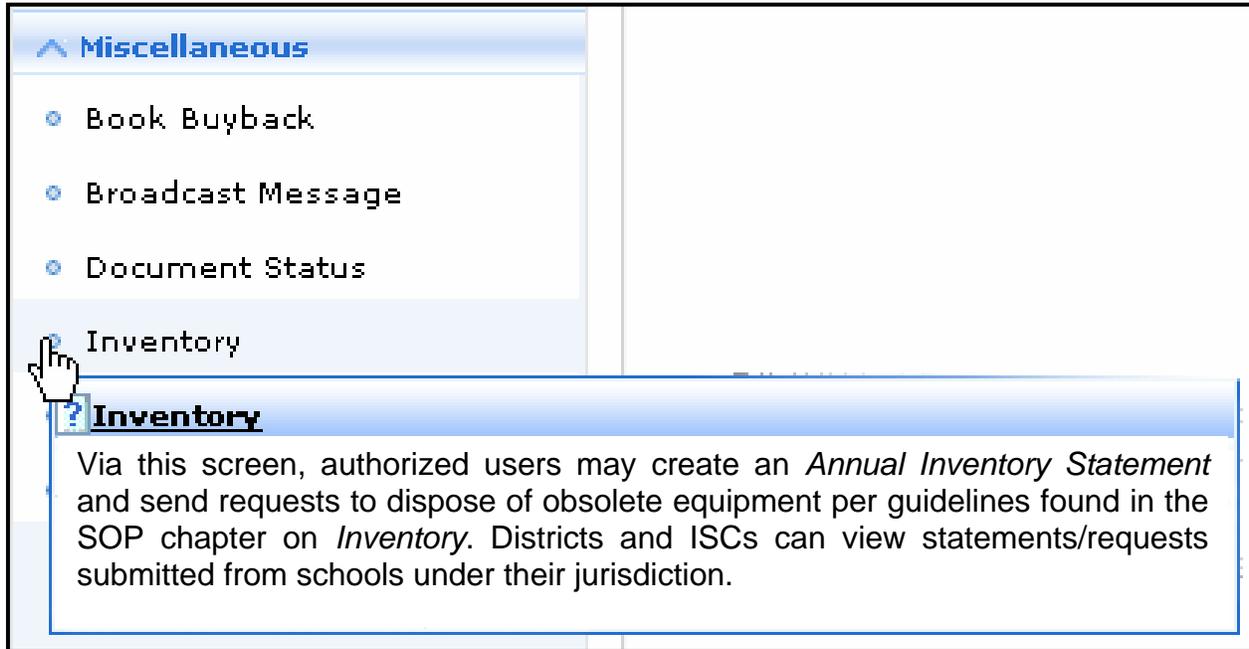
Search By: Document Number   Criteria:    [Search](#)   [Advanced Search](#)

[All \(0\)](#)   [Posted \(0\)](#)   [Awaiting Approval \(0\)](#)   [Failed \(0\)](#)   [Deleted \(0\)](#)

! No documents found.

## SCREEN 47- INVENTORY – MOUSE OVER

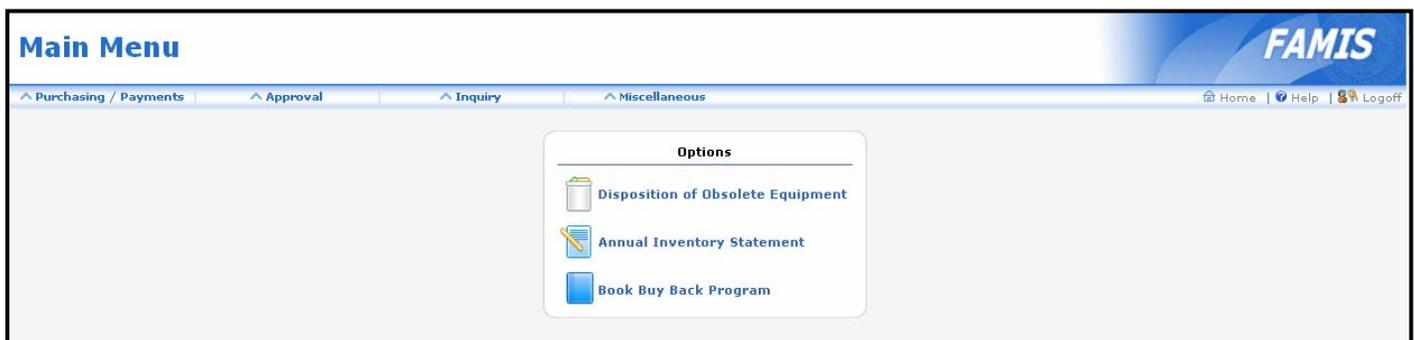
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The screenshot shows a web application interface. On the left, there is a sidebar menu under the heading "Miscellaneous". The menu items are "Book Buyback", "Broadcast Message", "Document Status", and "Inventory". A mouse cursor is hovering over the "Inventory" item, which has triggered a tooltip. The tooltip has a blue header with a question mark icon and the word "Inventory". Below the header, the text reads: "Via this screen, authorized users may create an *Annual Inventory Statement* and send requests to dispose of obsolete equipment per guidelines found in the SOP chapter on *Inventory*. Districts and ISCs can view statements/requests submitted from schools under their jurisdiction."

## SCREEN 48- MAIN MENU

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The screenshot shows the "Main Menu" page of the FAMIS system. The page has a blue header with the "FAMIS" logo on the right. Below the header, there is a navigation bar with links for "Purchasing / Payments", "Approval", "Inquiry", and "Miscellaneous". On the right side of the navigation bar, there are links for "Home", "Help", and "Logoff". The main content area is light gray and contains a box titled "Options" with three items: "Disposition of Obsolete Equipment" (with a trash can icon), "Annual Inventory Statement" (with a document icon), and "Book Buy Back Program" (with a book icon).

## SCREEN 49- STOP PAYMENT FORM – MOUSE OVER

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^ **Miscellaneous**

- Book Buyback
- Broadcast Message
- Document Status
- Inventory
- **Stop Payment Form**

**Stop Payment Form**

This screen enables the designated school or ISC liaison to complete and submit on-line a request to stop a check payment. The submission triggers an email to DFO for further action.

## SCREEN 50- ON-LINE STOP PAYMENT REQUEST

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 **NYC Department Of Education**  
Joel I. Klein, Chancellor



### On-Line Stop Payment Request

[Stop Payment Instructions](#)      [Electronic Check Imaging Instructions](#)

Today's Date: 11/5/2007

District:

Location Code:

Address:

City:  State: NY  Zip:

Phone Number:  Ext:

Fax Number:

First Name:  M.I:  Last:

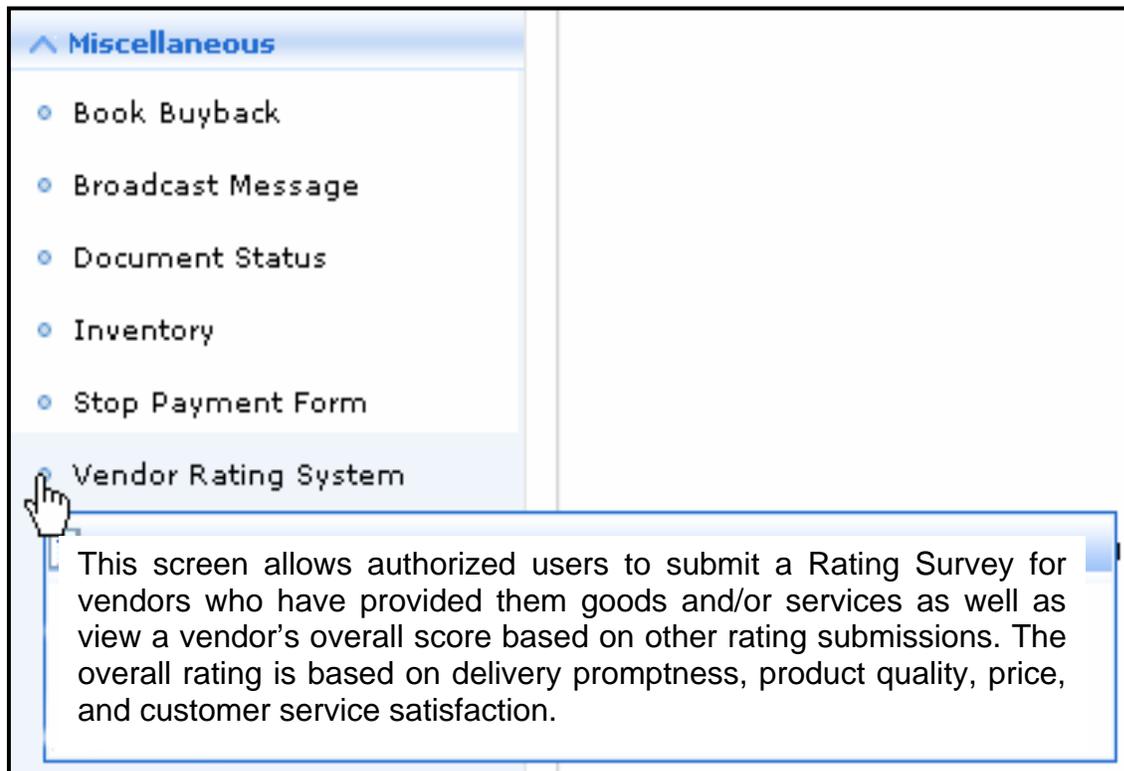
Email Address:

Integrated Service Center:

Payee	Check Number	Amount (\$123.23)	Issued Date (MM/DD/YY)
1 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Comments: <input type="text"/>			
2 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Comments: <input type="text"/>			
3 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Comments: <input type="text"/>			
4 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Comments: <input type="text"/>			
5 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Comments: <input type="text"/>			

## SCREEN 51- VENDOR RATING SYSTEM – MOUSE OVER

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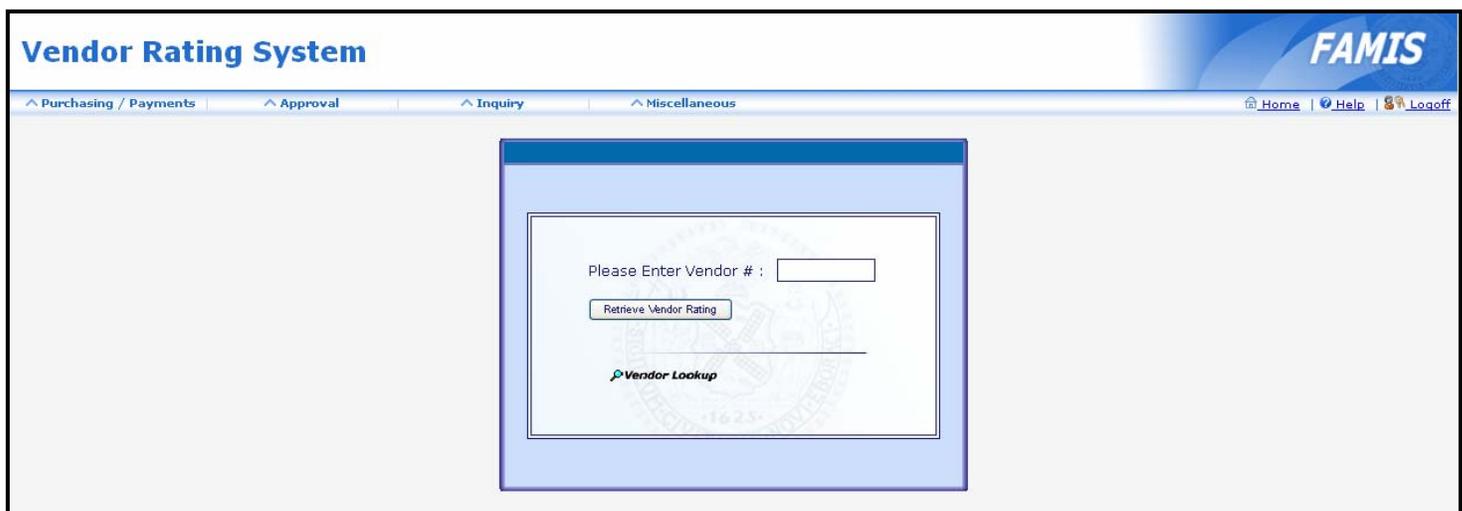


The screenshot shows a web application menu with a 'Miscellaneous' section. The 'Vendor Rating System' option is highlighted, and a tooltip is displayed over it. The tooltip contains the following text:

This screen allows authorized users to submit a Rating Survey for vendors who have provided them goods and/or services as well as view a vendor's overall score based on other rating submissions. The overall rating is based on delivery promptness, product quality, price, and customer service satisfaction.

## SCREEN 52- VENDOR RATING SYSTEM

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The screenshot shows the main interface of the Vendor Rating System. The title is 'Vendor Rating System' and the logo 'FAMIS' is in the top right corner. The navigation menu includes 'Purchasing / Payments', 'Approval', 'Inquiry', and 'Miscellaneous'. The main content area contains a form with the following elements:

- Text: 'Please Enter Vendor # :'
- Input field: A text box for entering the vendor number.
- Button: 'Retrieve Vendor Rating'
- Text: 'Vendor Lookup' with a magnifying glass icon.

## **ADDITIONAL SCREENS**

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In the following section, we have provided facsimiles of screens (mouse over and initial screen), which are NOT available to all FAMIS users. These screens are marked in **RED** on page 5 – [click here](#). Access to certain applications within FAMIS is dependent on your title and FAMIS Security Profile.

### **SCREEN 53- PRINCIPAL PER SESSION SCREENS**

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#### **SCREEN 53A – MOUSE OVER**

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The screenshot displays the NYC Department of Education's FAMIS NEWS page. The header includes the department logo, the name 'NYC Department of Education', and the Chancellor's name 'Joel L. Klein, Chancellor'. Below the header, there are navigation links for 'Mayor's Office', 'DOE', 'DOE Email', and 'Personnel Directory'. A user greeting 'Welcome, John Doe' is visible, along with links for 'Edit Profile' and 'Sign Out'. The main content area is titled 'FAMIS NEWS' and contains a paragraph of text. A mouse-over tooltip is shown over the 'Principal Per Session' link in the left-hand navigation menu, displaying the following text:

The Per Session Activity Online Approval Application allows a principal to request online approval to perform Per Session activities. Requests must be made prior to performing the per session activity. Requests are automatically emailed to the Community Superintendent for approval. If necessary, a request requiring a waiver approval will be electronically sent to the Division of Human Resources (DHR). All principal Per Session activities are capped at 400 hours. Per Session activity must not be used as means of providing additional compensation for work or responsibilities related to the principal's primary assignment.

## SCREEN 53B – PRINCIPAL APPROVAL

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**Principal Approval** FAMIS

^ Purchasing / Payments | ^ Approval | ^ Inquiry | ^ Miscellaneous | Home | User Guide | Logoff

Principal Per Session

:: Make a Per Session Request OR View History ::

[REQUESTING PER SESSION](#) Make a Request for Per Session

[REVIEW STATUS OF REQUESTS](#) View History of Previous Requests

## SCREEN 53C – PRINCIPAL APPROVAL - AGREEMENT

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**Principal Approval** FAMIS

^ Purchasing / Payments | ^ Approval | ^ Inquiry | ^ Miscellaneous | Home | User Guide | Logoff

Principal Agreement

Principal Attestation For Per Session Activity:

I attest that I am not using this request for per session activity as a means of providing additional compensation for work or responsibilities related to my primary assignment.

[Click Here if you agree to the terms](#)

## SCREEN 53D – PRINCIPAL APPROVAL - REQUEST

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**Principal Approval** FAMIS

^ Purchasing / Payments | ^ Approval | ^ Inquiry | ^ Miscellaneous | Home | User Guide | Logoff

Principal Request Home

Year: 2008 ?

EIS ID Number\*: 1234567

# SCREEN 53E – PRINCIPAL APPROVAL - DETAILS

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Principal Approval

FAMIS

^ Purchasing / Payments
^ Approval
^ Inquiry
^ Miscellaneous
Home
User Guide
Logoff

Principal Request
Home

Year:  ?

EIS ID Number\*:

**PER USER INFO.**

First Name <input type="text" value="John"/>	Last Name <input type="text" value="Smith"/>
Title Code <input type="text" value="SUPLQ"/>	Title Description <input type="text" value="PRINCIPAL"/>
School <input type="text" value="PS 123"/>	School Name <input type="text" value="John Doe Elementary School"/>

Principal's Email Address  

 Check to Update Email

**Previous Per Session Approvals SY:**

Start and End Date of Per Session Activity:	09/04/2007	TO	06/30/2008
Start and End Time of Per Session Activity:	3:20 PM	TO	6:30 PM
Location for Per Session Activity:	Q		
School Name			
Description of Per Session Activities	INQUIRY TEAM		
Per Session Circular (Job Posting Number)	003		
Bulk Job ID	68R9N		
District	28		
Per Session Hours Requested	80	Hrs	
Per Session Hours Used	0	Hrs	

Start and End Date of Per Session Activity:	10/13/2007	TO	06/30/2008
Start and End Time of Per Session Activity:	8:00 AM	TO	2:00 PM
Location for Per Session Activity:			
School Name			
Description of Per Session Activities	SATURDAY, GR.3,4,5 TEST PREP & AIS CLASSES		
Per Session Circular (Job Posting Number)	001		
Bulk Job ID	680HQ		
District	28		
Per Session Hours Requested	115	Hrs	
Per Session Hours Used	0	Hrs	

Principal Attestation For Per Session Activity:

I attest that I am not using this request for per session activity as a means of providing additional compensation for work or responsibilities related to my primary assignment.

Does this per-session activity and the hours requested fall outside of your workday as the principal of the school? \*  Yes  No

Does this activity have an approved posting? \*  Yes  No

**Per Session Request Details:**

Principals Daily Work Hours *	<input type="text" value="08"/> : <input type="text" value="00"/> AM TO <input type="text" value="08"/> : <input type="text" value="00"/> AM
Start and End Date of Per Session Activity *	<input type="text"/> TO <input type="text"/>
Start and End Time of Per Session Activity *	<input type="text" value="08"/> : <input type="text" value="00"/> AM TO <input type="text" value="08"/> : <input type="text" value="00"/> AM
Location for Per Session Activity *	<input type="text"/>
School Name	<input type="text"/>
Description of Per Session Activities *	<input type="text"/>
Per Session Circular (Job Posting Number) *	<input type="text"/>
Bulk Job ID *	<input type="text"/>
District	<input type="text"/>
Per Session Hours Requested *	<input type="text"/> Hrs

\* Required Field...

# SCREEN 54- BANKING SURVEY – MOUSE OVER

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NYC Department of Education  
Joel I. Klein, Chancellor

Mayor's Office | DOE | DOE Email | Personnel Directory

1/22/2008 11:20:06 AM

Welcome, [Edit Profile](#) | [Sign Out](#)

FAMIS NEWS

**Banking Survey**

By July 31st of each year, a reconciled June 30th balance must be reported in the Survey for all Department of Education Bank Accounts.

Other Links

- FY07 Close Calendar
- School Procurement Invoicing
- W-9
- DFO
- Purchasing News
- DOE Home
- Portal News
- Students
- Parents
- Teachers
- Districts/Schools

# SCREEN 55- BANKING SURVEY

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Click Here'."/>

NYC Department of Education  
Joel I. Klein, Chancellor

1/22/2008 3:52:31 PM

Bank Account Survey

Email:

School Location Code:   
(i.e. M001)

Bank Account Number:

[Login](#) [Clear](#)

Account Not Registered? [Click Here](#)

## SCREEN 56- CORE CURRICULUM – MOUSE OVER

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The screenshot shows the NYC Department of Education FAMIS interface. At the top left is the DOE logo and name, with the Chancellor's name below. The top right features the FAMIS logo and the date/time: 1/22/2008 12:03:44 PM. A navigation bar includes links for Mayor's Office, DOE, DOE Email, and Personnel Directory. Below this is a welcome message and links for Edit Profile and Sign Out. The main content area is titled 'FAMIS NEWS' and contains a section for 'Core Curriculum' with a mouse-over tooltip. The tooltip text reads: 'This screen allows users to place orders for Core Curriculum materials during the central ordering window each Spring. After the ordering window closes, schools can click on this screen to view their order history. Specific ordering and delivery timeframes are posted each year in "Principals' Weekly.". Please contact the Core Curriculum Response Team at 718-935-3334 or curriculum@schools.nyc.gov" for any assistance.' On the right side, there is an 'Other Links' menu with items like 'FY07 Close Calendar', 'School Procurement Invoicing', 'W-9', 'DFO', 'Purchasing News', 'DOE Home', 'Portal News', and 'Students'.

## SCREEN 57- CORE CURRICULUM

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The screenshot displays the 'Core Curriculum' page within the FAMIS system. The page title is 'Core Curriculum' and the FAMIS logo is in the top right. A navigation bar at the top contains tabs for 'Purchasing / Payments', 'Approval', 'Inquiry', and 'Miscellaneous', along with 'Home', 'Help', and 'Logoff' links. The main content area is titled 'Order Location' and contains a form labeled ':: Enter Location ::'. The form has a 'District:' dropdown menu with a list of districts from 01 to 11, where '01' is currently selected. To the right of the dropdown is a 'Location:' text input field. Below the dropdown and input field is a 'Next' button with a right-pointing arrow.

# SCREEN 58- FINANCIAL PROCESSING – MOUSE OVER

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# SCREEN 59- FINANCIAL PROCESSING

[Go Back to Table of Contents](#)

# SCREEN 60- SECURITY MAINTENANCE – MOUSE OVER

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The screenshot shows the NYC Department of Education FAMIS portal. The header includes the NYC Department of Education logo and name, along with the FAMIS logo. The navigation bar contains links for Mayor's Office, DOE, DOE Email, and Personnel Directory. A user is logged in, with a 'Welcome,' message and links for 'Edit Profile' and 'Sign Out'. The date and time are 1/22/2008 11:34:00 AM. The main content area is titled 'FAMIS NEWS' and is currently blank. On the left, there is a sidebar with a tree view containing 'Purchasing / Payments', 'Approval', 'Inquiry', and 'Miscellaneous'. A mouse-over tooltip is visible over the 'Security Maintenance' link in the 'Miscellaneous' section. The tooltip text reads: 'This screen can be used for Security Administrators at the Central Office and ISCs to view and modify security profiles for user that fall within their jurisdiction. These security profiles include User Information, District Access, Location Access, Document Type Access, Portal Access, Initiation Dept Access, and Trans Group information.' On the right, there is an 'Other Links' section with various links like 'FY07 Close Calendar', 'School Procurement Invoicing', 'W-9', 'DFO', 'Purchasing News', 'DOE Home', 'Portal News', 'Students', 'Parents', 'Teachers', 'Districts/Schools', 'Statistical Summaries', and 'Add More Links'.

# SCREEN 61- SECURITY MAINTENANCE

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The screenshot shows the 'Security Maintenance' screen in the FAMIS portal. The header includes the NYC Department of Education logo and name, along with the FAMIS logo. The navigation bar contains links for Purchasing / Payments, Approval, Inquiry, and Miscellaneous. The user is logged in, with a 'Home' link, 'Help' link, and 'Logoff' button. The main content area is titled 'Security Maintenance' and features a search bar for 'User ID' with a 'Search' button and a prompt '<-- Enter user ID and click search.' Below the search bar, there are tabs for 'FAMIS', 'CPS', 'EIS', 'PER DIEM', and 'PER SESSION (PED)'. The 'FAMIS' tab is selected. Underneath, there is a section for 'Options' with a list of links: 'User Info', 'District Access', 'Location Access', 'Portal Access', 'Document Type Access', 'Initiating Dept Access', and 'Trans Code Group'. A large watermark of the NYC Department of Education seal is visible in the background.

## SCREEN 62- P-CARD EXPENSE ADMIN. – MOUSE OVER

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The screenshot shows the NYC Department of Education FAMIS interface. The header includes the department logo, name, and the Chancellor's name, Joel I. Klein. The navigation bar contains links for Mayor's Office, DOE, DOE Email, and Personnel Directory, along with a date and time stamp (1/22/2008 11:34:00 AM). A left sidebar lists menu items: Purchasing / Payments, Approval, Inquiry, Miscellaneous, Pcard Expense - Admin, and Pcard Expense - Admin (highlighted with a mouse-over tooltip). The main content area displays a 'FAMIS NEWS' section. The tooltip for 'Pcard Expense - Admin' contains the following text:

This screen allows authorized users access to view certified and uncertified monthly P-card expenses. To facilitate the certification process, the system will automatically generate an e-mail to all cardholders upon receipt of monthly electronic card statement from the bank. All cardholders or an authorized designee are required to record the appropriate expense type (e.g., supplies, parking, postage) for each transaction on this screen. Certification of expenses will serve as authorization and approval to realign the spending plan where the expenses were made.

On the right side, there is an 'Other Links' section with various links: FY07 Close Calendar, School Procurement Invoicing, W-9, DFO, Purchasing News, DOE Home, Portal News, Students, Parents, Teachers, Districts/Schools, Statistical Summaries, and Add More Links.

## SCREEN 63- P-CARD EXPENSE ADMIN.

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The screenshot displays the 'P-Card Expense Reporting' screen within the FAMIS system. The header features the title 'P-Card Expense Reporting' and the FAMIS logo. The navigation bar includes links for Purchasing / Payments, Approval, Inquiry, and Miscellaneous, along with Home, Help, and Logoff options. The main content area shows a 'Welcome Admin' message and two buttons: 'View All' and 'Uncertified Records'.



**NYC**<sup>TM</sup>

**Department of  
Education**