



Charter Schools Accountability & Support  
NYSTL Purchasing User Guide  
Updated September 16, 2013

The New York State Textbook Law (NYSTL) provides funds for textbooks, library books and software to help improve technology and instructional aids at schools. NYSTL funding is restricted to the three categories (Text Books, Library & Software). This is non-negotiable. NYSTL funding is a non-cash allocation that must be spent via the FAMIS portal.

The attached excel spreadsheet reflects the allocations per school. Allocations are based on a per-capita rate as follows:

- a) Textbook Amount - \$58.25
- b) Library Amount - \$6.25
- c) Software Amount - \$14.98

Important Reminders:

- The purchasing deadline is generally in March. This office will send out the final deadline when it is announced. **After the deadline, you will lose the funding allocation. The funding does not roll over to the next year.**
- Orders are limited to NYSTL approved items only, not supplies or equipment.
- **This year, schools are able to transfer dollars around. Specifically:**
  - Textbook and Software funds may be used to purchase Library Books.
  - Textbooks and Software funds may also be transferred to each other.
  - Library Books funds may not be used to purchase Textbooks or Software.

Sections:

- [Accessing FAMIS](#)
- [Transferring Dollars](#)
- [How to Find Items](#)
- [How to Create a PO for Textbook/ Software](#)
- [How to Create a PO for Library](#)
- [How to Approve a PO](#)

[Certifying Your PO After Purchase](#)  
[How to Search for a PO](#)  
[Resources](#)

## Accessing Famis

### New Users

If you have never had a FAMIS User ID, please

- Complete a "[FAMIS User ID Request](#)" form. (Click CTRL to follow the link).
- Fill out the "Department Head Approval" portion as well. This can be filled out by Principal, Assistant Principal, etc.
- Fill out the form electronically.
- Submit completed form to [FAMIS@schools.nyc.gov](mailto:FAMIS@schools.nyc.gov)

Each school MUST have **(2) two** users; **ONE INITIATOR** and **ONE APPROVER**. The initiator will create the purchase orders and the approver will approve the purchase orders.

### Existing Users

Existing users please note that user IDs can timeout monthly, and can be revoked due to security violations such as entering the password wrong more than 3 times or lack of activity. Existing users whose credentials have expired due to inactivity please email [FAMIS@schools.nyc.gov](mailto:FAMIS@schools.nyc.gov)

For password resets email [FAMIS@schools.nyc.gov](mailto:FAMIS@schools.nyc.gov) with the subject line: "password reset"

### Instructions for First Time Sign On or Password Reset

At the initial log in screen:

- Enter your assigned User ID.
- Re-enter your User ID as your password.
- Click on Change Password
- The following message will appear: *Your password is expired. Please enter a new Password and confirm the new Password.*
- Enter a Password in New Password box. NOTE: Passwords should be 5-8 characters. Passwords cannot be reused.
- Re-enter the password in the Confirm Password box.
- Click on Change Password.

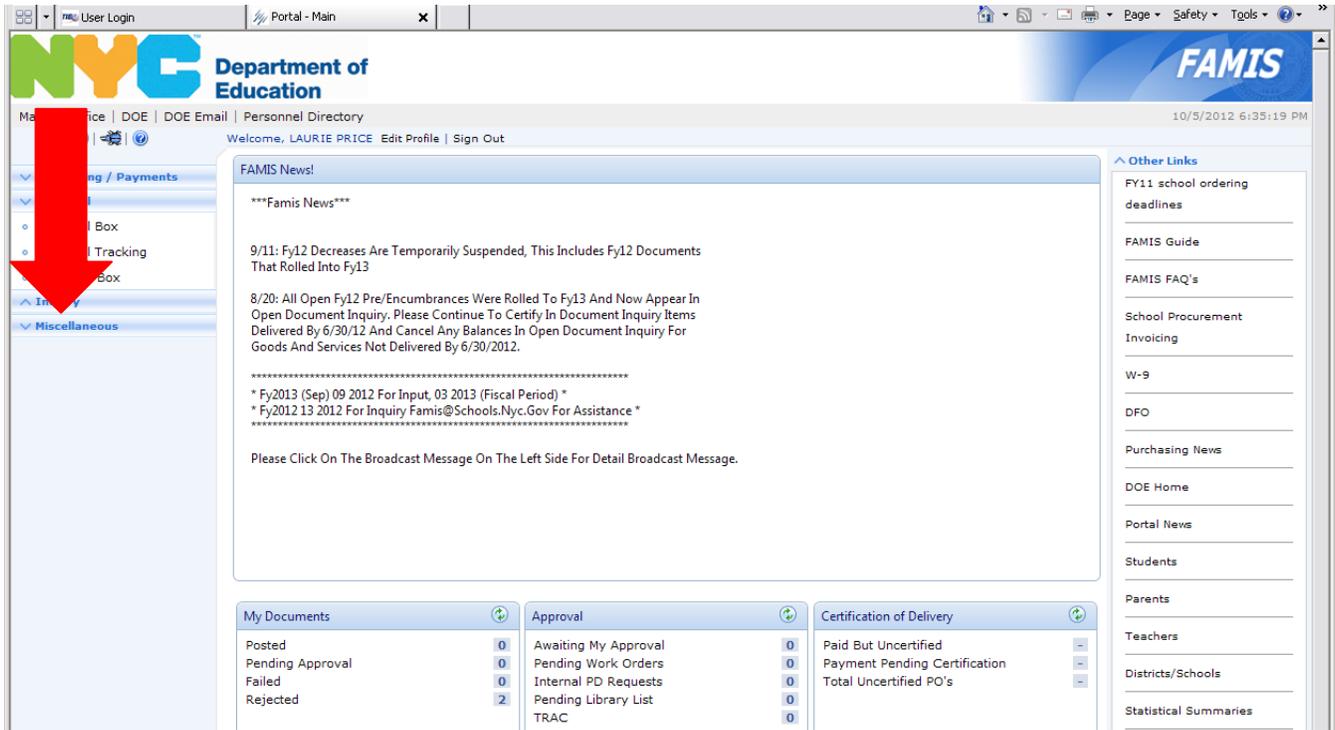
You will now see the broadcast screens and your FAMIS Portal menu.

Each individual is responsible for his or her own User ID. Do not share user ID and password information.

### FAMIS Technical Assistance

- For password resets email [FAMIS@schools.nyc.gov](mailto:FAMIS@schools.nyc.gov) with the subject line: "password reset."
- For procurement issues, call Portal Support Client Service Help Desk at **718-935-4444**.
- For question about books/orders, **please contact the Vendor**.

NOTE: The Charter School Accountability & Support Team DOES NOT have access to reset passwords or set up User ID's.

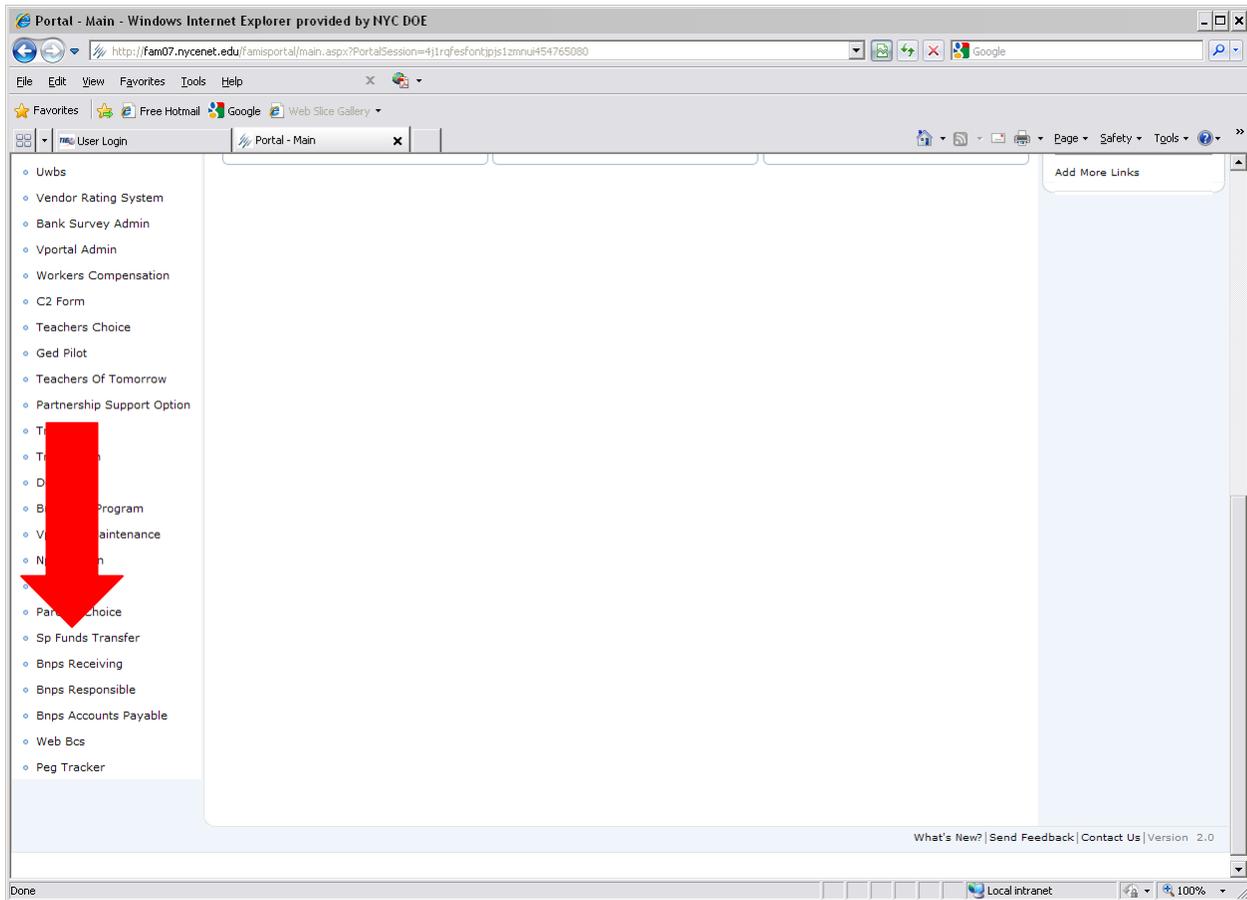


## Transferring Dollars

This year, schools are able to transfer dollars around. Specifically:

- Textbook and Software funds may be used to purchase Library Books
- Textbooks and Software funds may also be transferred to each other
- Library Books funds may not be used to purchase either Textbooks or Software

Schools must make these transfers through the FAMIS portal. To transfer dollars, log into FAMIS. Click on Miscellaneous on the right side of the screen.



## Transferring Dollars (Cont'd)

Click on "Sp Funds Transfer."

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**Spending Plan: Funds Transfer** **FAMIS**

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

Funds Transfer

Fiscal Year: 2013 District: 84 - Charter Schools Location: X7

Object Code	Quick Code	Activity Code	AC (Funding Source)	Available Balance (\$)	Amt. to Transfer	Object to transfer to	Remaining After Transfer
199	002129	U652	CTL Charter Schools NYSTL Textbooks and Software	\$ 48,123	<input type="text"/>	Please select an Object Code ...	
337	002129	U6A1	CTL Charter Schools NYSTL Textbooks and Software	\$ 16,027	<input type="text"/>	Please select an Object Code ...	
338	002129	U651	CTL Charter Schools NYSTL Library Books	\$ 5,475	<input type="text"/>	<input type="text"/>	

• Library Funds (Object code 338) cannot be transferred.  
• All funding for all transactions submitted prior to 3:00 pm will be available for processing on the next business day. Funding for transactions submitted after 3 PM will be available for use in 2 business days.  
• Object code 199 is for Software, Object Code 337 is for Textbooks.

### Transferring Dollars (Cont'd)

Enter in the amount you would like to transfer in the “Amt. to Transfer” column. This amount cannot exceed the available balance. The row labeled with Object Code 199 is the software funding source. You can transfer from software into the library or textbooks. The row labeled with Object Code 337 is the textbook funding source.

Then, use the pull-down menu in the column “Object to transfer to” to choose where to transfer the funds.

If you transfer dollars from software into textbooks (object code 337), you will see the transfer after you click “Apply.” You will see the new balances appear, with no other changes.

If you transfer dollars between software and library (object code 338), a new row will appear, with a new Activity Code. Please note that when you later create a PO for library purchases, you will need to reference BOTH activity codes.

## Spending Plan: Funds Transfer

FA

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

Funds Transfer

Fiscal Year: 2013 | District: 84 - Charter Schools | Location: X704 Go

**myGalaxy** Galaxy Spending Plan

Object Code	Quick Code	Activity Code	AC (Funding Source)	Available Balance (\$)	Amt. to Transfer	Object to transfer to	Remaining After Transfer
199	002129	U652	CTL Charter Schools NYSTL Textbooks and Software	\$ 38,123	[ ]	Please select an Object Code ..	
337	002129	U6A1	CTL Charter Schools NYSTL Textbooks and Software	\$ 21,027	[ ]	Please select an Object Code ..	
338	002129	U651	CTL Charter Schools NYSTL Library Books	\$ 5,475	[ ]		
338	002129	XGMO	CTL Charter Schools NYSTL Textbooks and Software	\$ 5,000	[ ]	Please select an Object Code ..	

• Library funds (Object code 338) cannot be transferred.  
 • All funding for all transactions submitted prior to 3:00 pm will be available for processing on the next business day.  
 Funding for transactions submitted after 3 PM will be available for use in 2 business days.  
 • Object code 199 is for Software. Object Code 337 is for Textbooks.

Cancel  
Apply

Done Local intranet



### Transferring Dollars (Cont'd)

Please observe that when dollars were transferred from Software (object code 199) to Library (object code 338), an additional row with a new Activity Code was generated. In the example above, \$5,000 was transferred from software (object code 199) to library (object code 338). What is now available to spend for library is \$5,475 (the original amount with activity code U651) and \$5,000 (the new amount with activity code XGMO) for a total of \$10,475. Please note that the AC (Funding Source) label has not changed from Textbooks and Software, but because the Object code is now 338, these funds must be used for library. As will later be discussed, if you are purchasing more than \$5,000 in library books, you will need to enter both activity codes on the PO. No additional Activity Codes are generated when transferring funds between Textbook and Software. Library funds cannot be transferred.

All funding for all transactions submitted prior to 3:00 pm will be available for processing on the next business day. Funding for transactions submitted after 3 PM will be available for use in 2 business days.

You can make as many changes to the available balance as wanted. All users for a school can make changes to the funding categories. Whichever change is made last before 3 PM is the change that will be effective on the next business day. When planning the timing of your purchases, please keep this additional day in mind.

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## How to Find Items

The SHOPDOE/e-catalog ([www.Shopdoe.com](http://www.Shopdoe.com)) is helpful to use in planning your purchases.

To use, enter in a work or personal email address and click submit. No user name is required; anyone may use this website to browse for items.

NYC Department of Education SHOPDOE NYCDOE purchasing planning portal

lprice5@schools.nyc.gov Logout Help

fountas All Commodities Description

Note: For TLS educational Software; Choose "Computer Software from the Drop Down menu and Click on "TLS – Educational Software" button

Search View All Items Advanced Search

Search Results Showing 1 - 20 of 377 records. Price [High-Low] First | Previous | Next | Last

	<b>Fountas &amp; Pinnell Leveled Literacy Intervention: (Blue) Grade 2: Little Book Package(4 Complete Sets of 120 Colored Little Books)</b> Number: 901802107 Vendor: HOUGHTON MIFFLIN COMPANY Availability: Check ARRA eligible item.	Form: Kit, contains copies of more than one product in the same media (i.e., all books) U/M: Each NYSTL: Allowed	<b>\$2,366.52</b> Add to Cart
	<b>Fountas &amp; Pinnell Leveled Literacy Intervention: (Orange) Grade K: Little Book Package(4 Complete Sets of 70 Colored Little Books)</b> Number: 901801410 Vendor: HOUGHTON MIFFLIN COMPANY Availability: Check ARRA eligible item.	Form: Kit, contains copies of more than one product in the same media (i.e., all books) U/M: Each NYSTL: Allowed	<b>\$1,380.47</b> Add to Cart
	<b>NONFICTION FOUNTAS\PINN LEVELED SET \ GR 6 (P-X) \ 6 COPIES OF 8 TITLES</b> Number: 76753753X Vendor: LEARNING LINKS, INCORPORATED Availability: Check ARRA eligible item.	Form: Paperback U/M: SET NYSTL: Allowed	<b>\$393.80</b> Add to Cart

### How to Find Items (Cont'd)

Suppose you are wondering if The Fountas & Pinnell Benchmark Assessment System is in FAMIS. You can enter in "Fountas Pinnell" in the search field, and will get results for any products available in FAMIS with that in the description, etc. Results can be sorted by price, vendor name, etc. From there, you can compile item numbers and ISBN's that will facilitate shopping in FAMIS.

Please note that each search result is labeled it is NYSTL allowed or not. Only these items are eligible for purchase.

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## How to Create a PO for Textbook/ Software

1. Go to the FAMIS portal: [https://df\(forms\).nycenet.edu/FamisPortal/login.aspx](https://df(forms).nycenet.edu/FamisPortal/login.aspx)
2. The "Initiator" logs in.
3. On the left side of the screen, click on purchasing.

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**Purchasing Setup**

^ Purchasing / Payments   ^ Approval   ^ Inquiry   ^ Miscellaneous

**Options**

- Options
  - Contracted
    - E-Catalog
      - Textbook/Trade Book
      - Computer Software
        - TLS-Educational Software
      - Audio/Visual media
      - Supplies and Instructional Materials
      - Wireless Service
      - Internal Services
      - Coach Bus
      - Leadership Academy
      - Computer Hardware & Consumer Electronics
    - Non-List
    - Professional Services
    - Listing Applications
    - Library Ordering
  - Non-Contracted
    - Change Notice
    - ARRA/CDBG contracts
    - iLearnNYC

**Welcome to the Purchasing application.**

Preview All Commodities

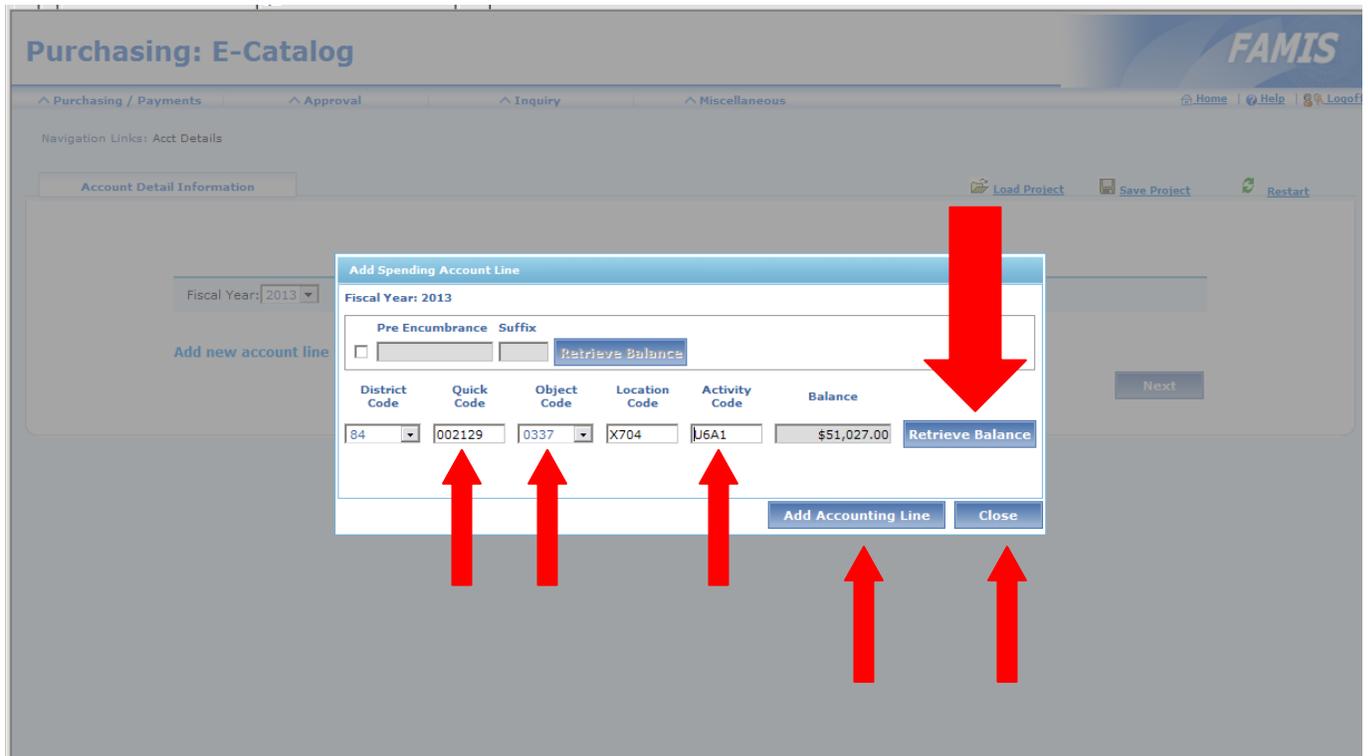


Preview Computer Software

Instructional and administrative computer software.

### How to Create a PO for Textbook/ Software (Cont'd)

4. Click on contracted services.
5. Click e-catalog.
6. Click Textbooks/Trade books or Computer Software (whichever you plan on purchasing)  
(Please see separate section on [purchasing library books.](#))



### How to Create a PO for Textbook/ Software (Cont'd)

7. District Code should be pre-populated with 84, your location code should also be pre-populated.
8. Quick code: enter 002129
9. Choose the correct object code for what you are purchasing:
  - a) Textbooks- 0337 OR
  - b) Software- 0199
 (See separate section for purchasing [Library Books](#))
10. Activity code- **enter the 4-digit activity codes for your DBN and the object code you are purchasing for in the NYSTL Allocations spreadsheet, located on the Charter Schools Accountability & Support [operations page](#).** (Use control-f to find your school.)
11. Click "Retrieve Balance". The first time you create a PO, you should see the same balance as what is in the spreadsheet. In consequent purchases, the balance left for that Object code and activity code will be reflected.
12. Click "Add Accounting Line." You will see a table appear in the background with this information.
13. Click "Close."

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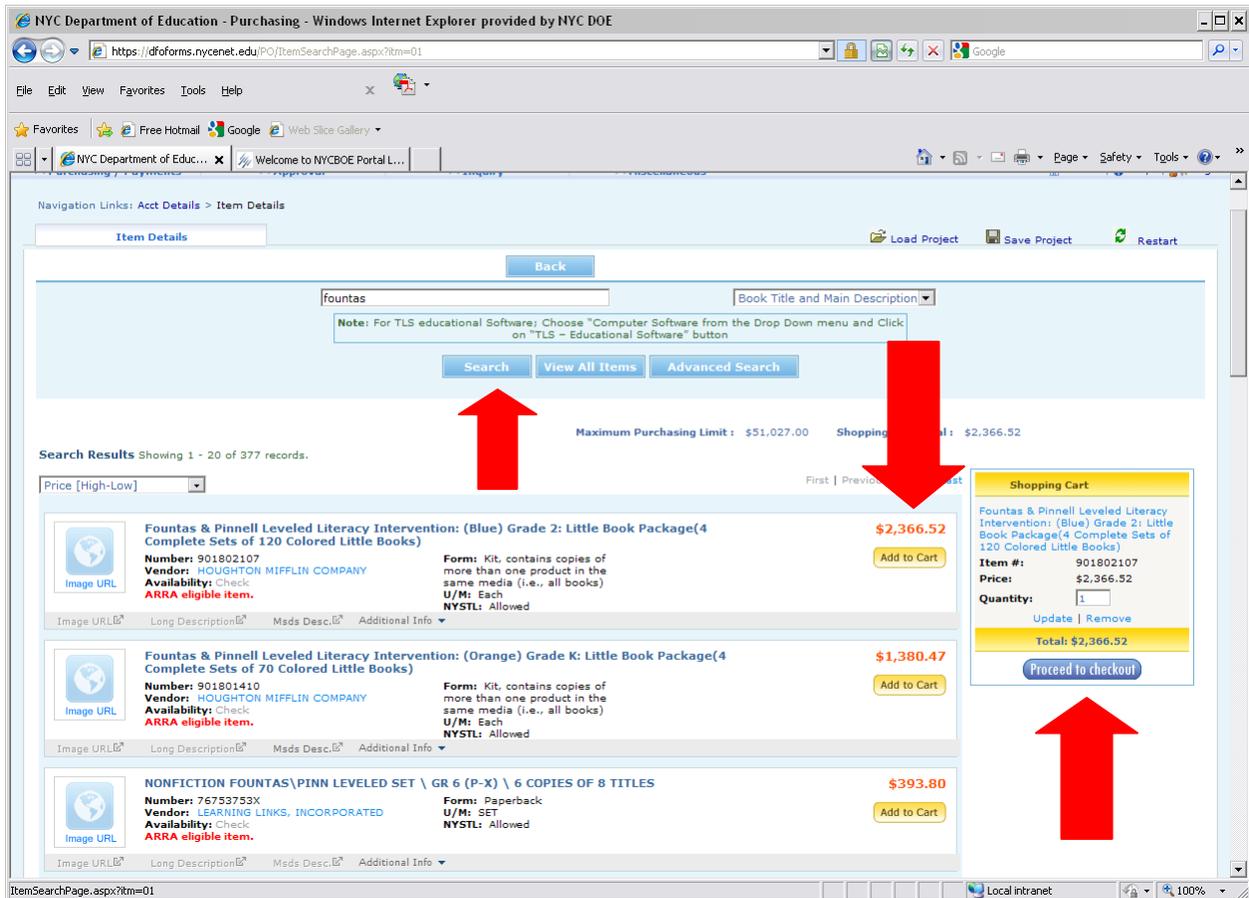
The screenshot displays the 'Purchasing: E-Catalog' interface. At the top, there is a navigation bar with tabs for 'Purchasing / Payments', 'Approval', 'Inquiry', and 'Miscellaneous'. Below this, there are navigation links and buttons for 'Load Project', 'Save Project', and 'Restart'. The main content area is titled 'Account Detail Information' and features a 'Fiscal Year' dropdown set to '2013'. A table with the following data is shown:

		Pre Encumbrance	District Code	Quick Code	Object Code	Location Code	Activity Code	Balance		
Remove	Update	N/A	N/A	84	002129	0337	X704	U6A1	\$51,027.00	
									Total	\$51,027.00

Below the table is a link for 'Add new account line' and a 'Next' button. A large red arrow points to the 'Next' button.

### How to Create a PO for Textbook/ Software (Cont'd)

14. Click next.



## How to Create a PO for Textbook/ Software (Cont'd)

15. Search for items by ISBN, title, description, etc.
  16. Add items to your cart. You can click "Save Project" if you want to come back to this same cart later on without adding lines, searching again.
  17. When done, click "Proceed to checkout."
- Please note- do not add more to your cart than what is available for the allocation category.

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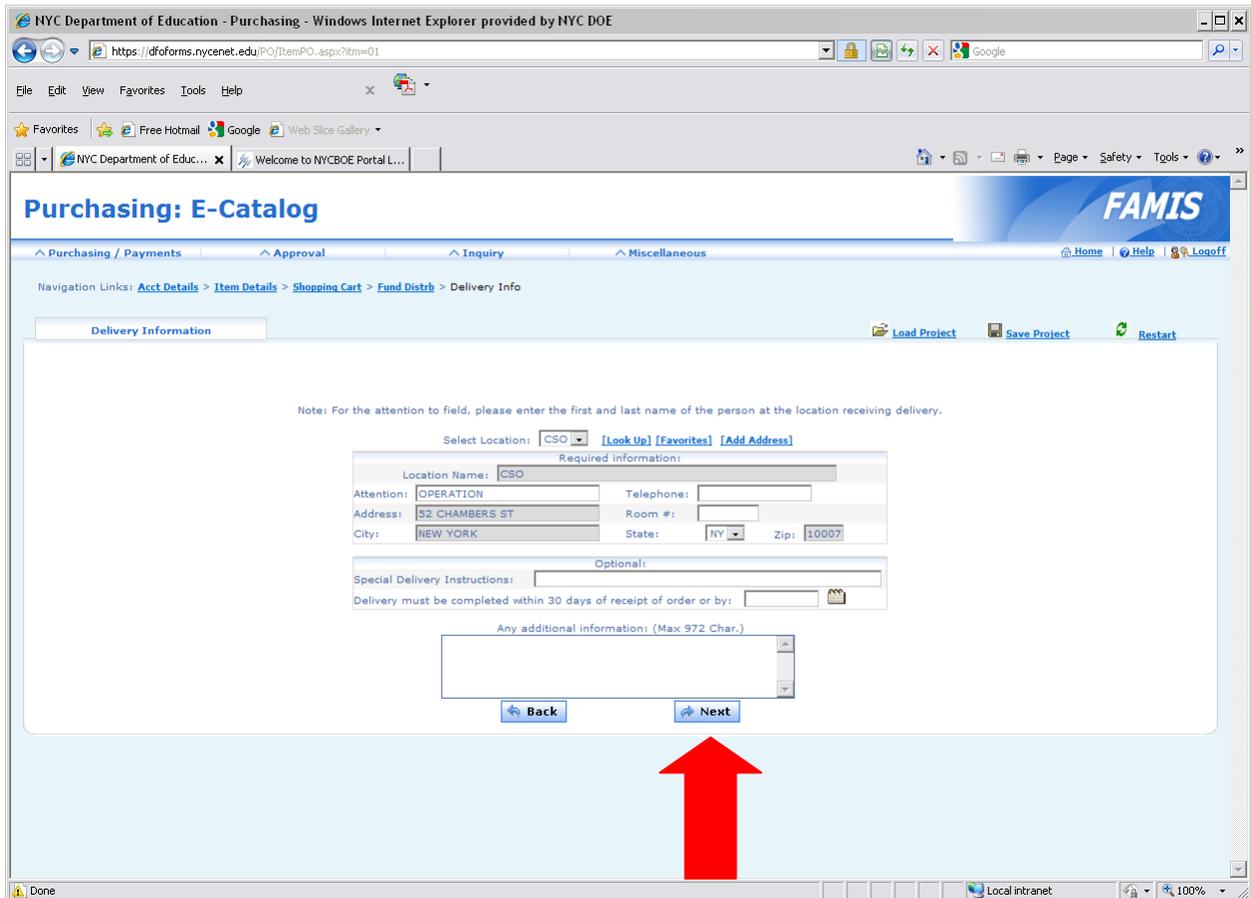
The screenshot shows a web browser window titled "NYC Department of Education - Purchasing - Windows Internet Explorer provided by NYC DOE". The address bar shows the URL: <https://dfoforms.nycenet.edu/PO/ViewShoppingCart.aspx?itm=01>. The page header includes "Purchasing: E-Catalog" and the "FAMIS" logo. Navigation links include "Purchasing / Payments", "Approval", "Inquiry", and "Miscellaneous". A "Navigation Links" section shows "Acct Details > Items Details > Shopping Cart". The main content area is titled "View Shopping Cart" and displays a table with one item:

	Item #	Description	Add'l	Vendor	U/M	Net Price	NYSTL
Remove	<input type="text" value="1"/>	Fountas & Pinnell Leveled Literacy Intervention: (Blue) Grade 2: Little Book Package(4 Complete Sets of 120 Colored Little Books)		HOUGHTON MIFFLIN COMPANY	Each	\$2,366.52	Allowed
<b>Total:</b>						<b>\$2,366.52</b>	

Below the table are three buttons: "Continue Shopping", "Update Cart", and "Checkout". A large red arrow points to the "Checkout" button. The page also includes a "Maximum Purchasing Limit: \$51,027.00" and a "Local Intranet" status bar at the bottom.

### How to Create a PO for Textbook/ Software (Cont'd)

18. Click "Checkout."
19. This creates the PO, where you will enter delivery instructions, etc.



## How to Create a PO for Textbook/ Software (Cont'd)

20. Enter in all delivery information. Make sure you fill in all required fields. This is the location where materials will be delivered to.

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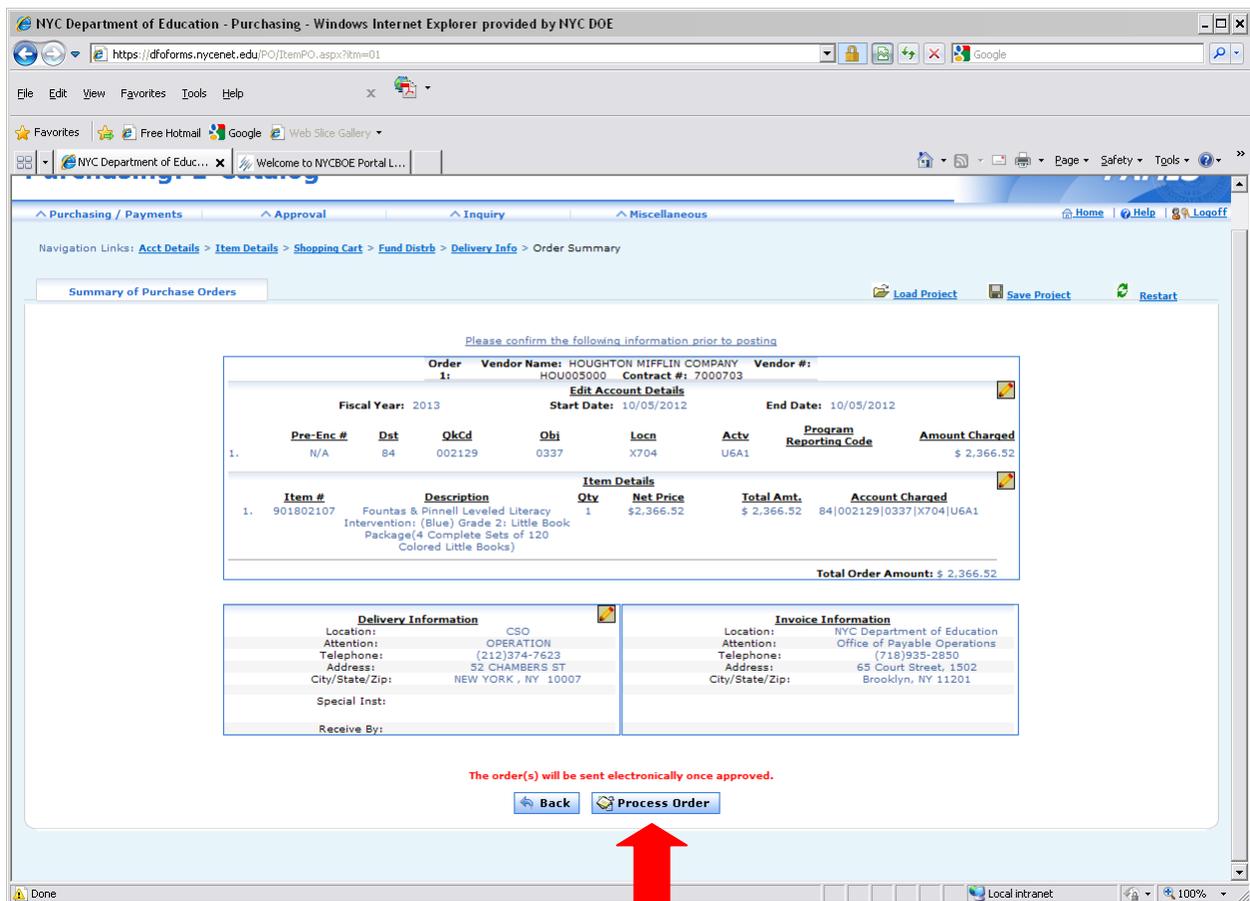
The screenshot shows a web browser window titled "NYC Department of Education - Purchasing - Windows Internet Explorer provided by NYC DOE". The address bar shows "https://dfoforms.nycenet.edu/PO/ItemPO.aspx?itm=01". The page header includes "Purchasing: E-Catalog" and "FAMIS". The navigation menu shows "Purchasing / Payments", "Approval", "Inquiry", and "Miscellaneous". The main content area is titled "Delivery Information" and contains a form with the following fields:

- Select Location: [CSO] [Look Up] [Favorites] [Add Address]
- Required information:
  - Location Name: [CSO]
  - Attention: [OPERATION] Telephone: [ ]
  - Address: [52 CHAMBERS ST] Room #: [ ]
  - City: [NEW YORK] State: [NY] Zip: [10007]
- Optional:
  - Special Delivery Instructions: [ ]
  - Delivery must be completed within 30 days of receipt of order or by: [ ]
- Any additional information: (Max 972 Char.) [ ]

At the bottom of the form are "Back" and "Next" buttons. A large red arrow points to the "Next" button.

### How to Create a PO for Textbook/ Software (Cont'd)

21. Enter in all Invoice information. This is where the vendor will seek payment, which is from the DOE. Fill in:
  - a) Location: NYC Department of Education
  - b) Attention: Office of Payable Operations
  - c) Telephone: 718-935-2850
  - d) Address: 65 Court Street
  - e) Room: 1502
  - f) City/State/Zip: Brooklyn, NY 11201
22. Click "Next."



## How to Create a PO for Textbook/ Software (Cont'd)

23. Make sure to confirm ALL INFORMATION before submitting.
24. Click "Process Order."
25. **Be sure to take note of the WR (document) number to reference in the future. Print the completed PO and keep on record.**
26. After you submit the PO, if you click Home, and then go to the "My Documents" section on the bottom left side of the screen, you should see this documents in the Pending Approval box. From here, the "Approver" account must sign in to FAMIS to [approve](#).

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## How to Create a PO for Library

This section is applicable only for purchasing Library Books with object code 0338 through the Listing Application on FAMIS. This process starts by reaching out to the below vendors with a list of desired books, and selecting one to work with. Each vendor has a slightly different process to allow browsing for items, creating item lists and sending quotes.

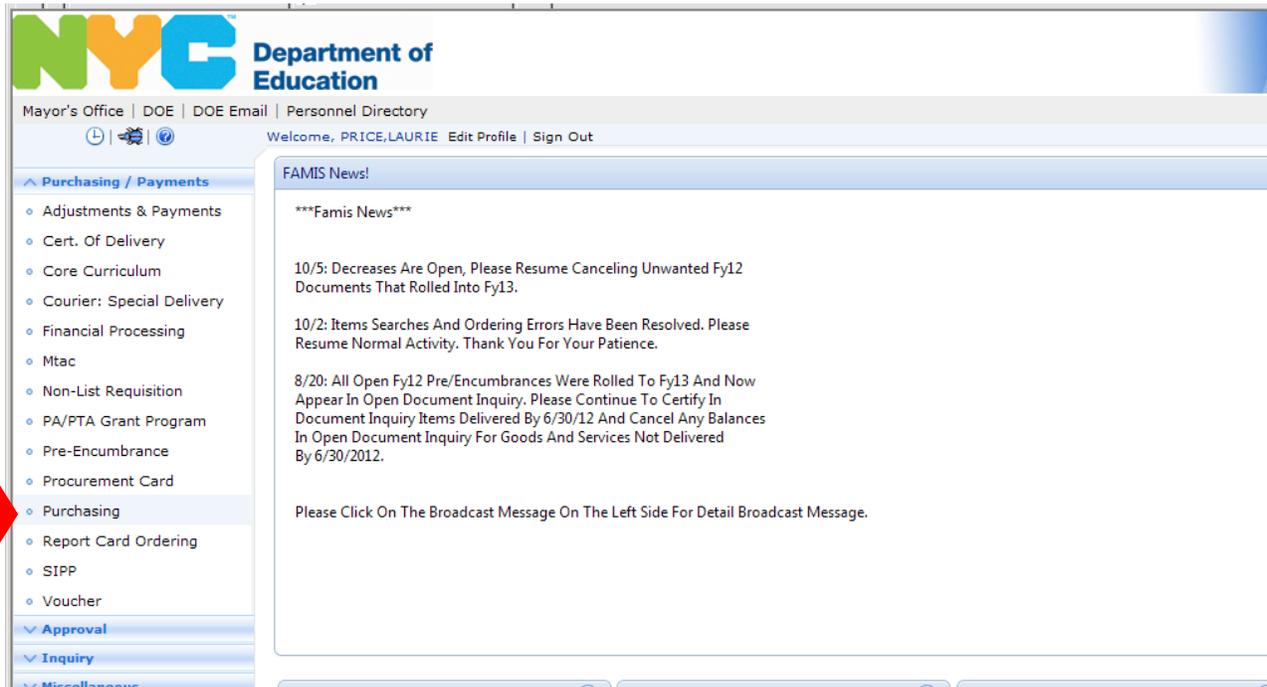
The three Listing Application library book vendors are:

Baker & Taylor, vendor #: BAK013000; contract #: 7209041  
Email: [nycorders@baker-taylor.com](mailto:nycorders@baker-taylor.com)  
Phone: 1-800-775-1200 ext. 2296

Follett Library Resources, vendor #: FOL025000; contract #: 7209042  
Email: [NYCDOE@fir.follett.com](mailto:NYCDOE@fir.follett.com)  
Phone: 1-888-511-5114 ext. 1NYC

Hertzberg-New Method (formerly Perma-Bound), vendor #: PER048000; contract #: 7209043  
Email: [nysupport@perma-bound.com](mailto:nysupport@perma-bound.com)  
Phone: 1-877-743-5509

Once you have chosen a vendor, finalized prices, items, total amounts due, the initiator logs into FAMIS.



## How to Create a PO for Library (Cont'd)

Once in FAMIS:

1. Go to the FAMIS portal: <https://dfoforms.nycenet.edu/FamisPortal/login.aspx>
2. The "Initiator" logs in.
3. On the left side of the screen, click on purchasing.

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### How to Create a PO for Library (Cont'd)

4. Click on "Contracted."
5. Click on "Professional Services."
6. Click on "Listing Applications."

**Purchasing: Listing Applications** **FAMIS**

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

[Load Project](#) | [Save Work](#) | [CHANGE NOTICE](#) | [RESTART](#)

**Vendor Information**

Vendor Number:   [RETRIEVE VENDOR INFORMATION](#)

**Vendor: BAKER & TAYLOR INC.**

Attn: ORDER DEPARTMENT	Address: 251 MOUNT OLIVE CHURCH ROAD	Contract #: <input type="text" value="Select Contract/Bids"/>
City: COMMERCE	State: GA	Zip: 30599
Phone:	Fax: (800) 775-1100	Toll Free: (800) 775-7480
Discount Terms: None		

[Selected Contract Information](#)

Title	District(s)	End Date
n/a	All Districts	n/a

Contract Type: n/a

[NEXT >>>](#)

[VENDOR](#) | [INVOICE TO DELIVER](#) | [ACCOUNT DETAILS](#) | [ITEM DETAILS](#)

### How to Create a PO for Library (Cont'd)

7. Type in the vendor number of the vendor you are working with (listed on page 18- be sure to chose the vendor you are working with).
8. Click "Retrieve Vendor Information." All fields should be pre-populated, except the contract #.
9. Choose the correct contract number (listed on [page 18](#)- be sure to chose the vendor you are working with).
10. Click "Next."

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NYC Department of Education - Purchase Order Form - Windows Internet Explorer provided by NYC DOE

https://dfroforms.nycenet.edu/PO/PrepWebPO.aspx?PortalSession=0goqigbu0yv5gbydkxibquyq71135

Purchasing: Listing Applications

FAMIS

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

Load Project | Save Work | RESTART

Invoice Information

[Select Invoice Address] Required:

Location Name: NYC DOE Payables

Attention: Payable Operations Telephone: (718)935-2850

Address: 65 Court Street Room #: 1502

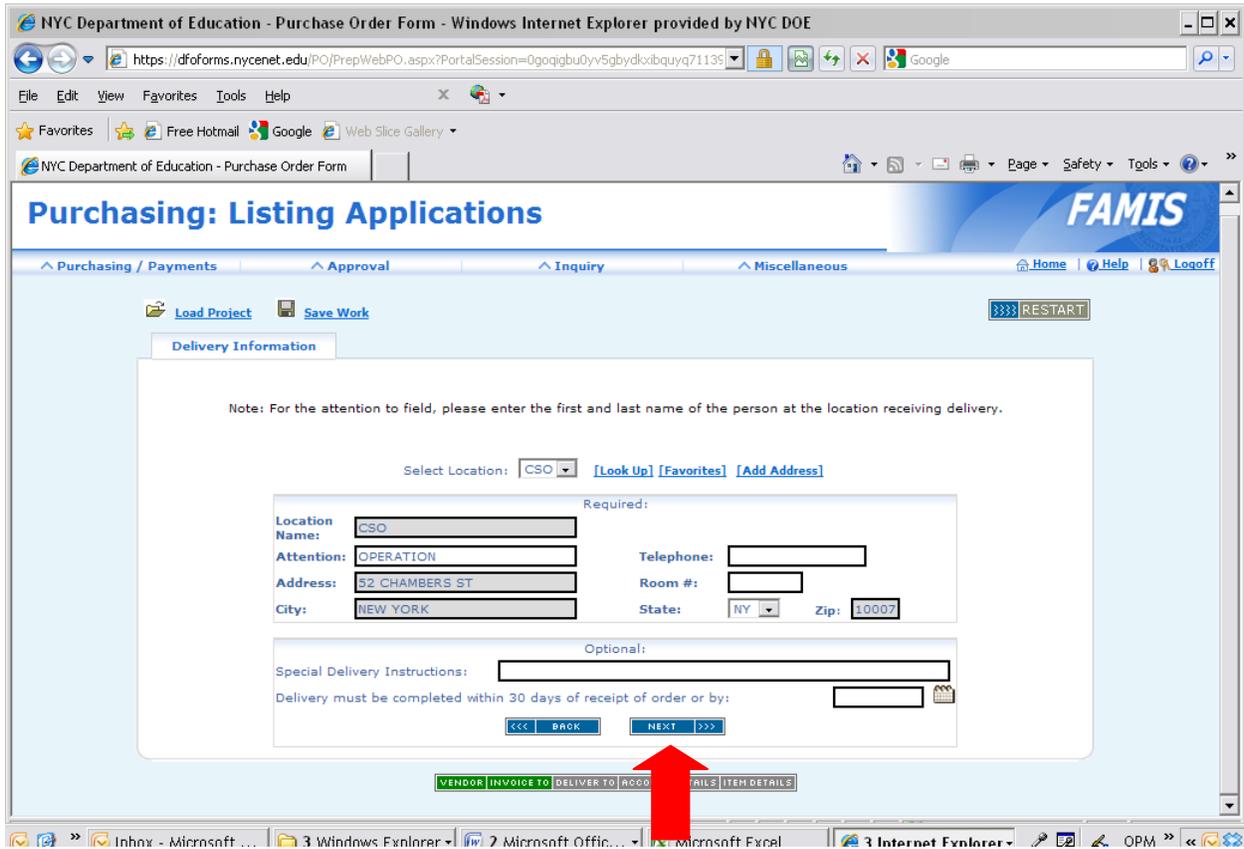
City: Brooklyn State: NY Zip: 11201

<<< BACK | NEXT >>>

VENDOR | INVOICE TO | DELIVER TO | ACCO | FAILS | ITEM DETAILS

### How to Create a PO for Library (Cont'd)

11. Confirm and complete all invoice information: This is where the vendor will seek payment, which is from the DOE. Fill in:
  - Location: NYC Department of Education
  - Attention: Office of Payable Operations
  - Telephone: 718-935-2850
  - Address: 65 Court Street
  - Room: 1502
  - City/State/Zip: Brooklyn, NY 11201
12. Click "Next."



### How to Create a PO for Library (Cont'd)

13. Enter in all delivery information. Make sure you fill in all required fields. This is the location where materials will be delivered.
14. Click "Next."

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NYC Department of Education - Purchase Order Form - Windows Internet Explorer provided by NYC DOE

https://dfoforms.nycenet.edu/PO/PrepWebPO.aspx?PortalSession=0goqigbu0yv5gbydkxibquyq71135

NYC Department of Education - Purchase Order Form

### Purchasing: Listing Applications

FAMIS

Purchasing / Payments Approval Inquiry Miscellaneous Home Help Logoff

#### Add Spending Account Line

Fiscal Year: 2013

Pre Encumbrance Suffix

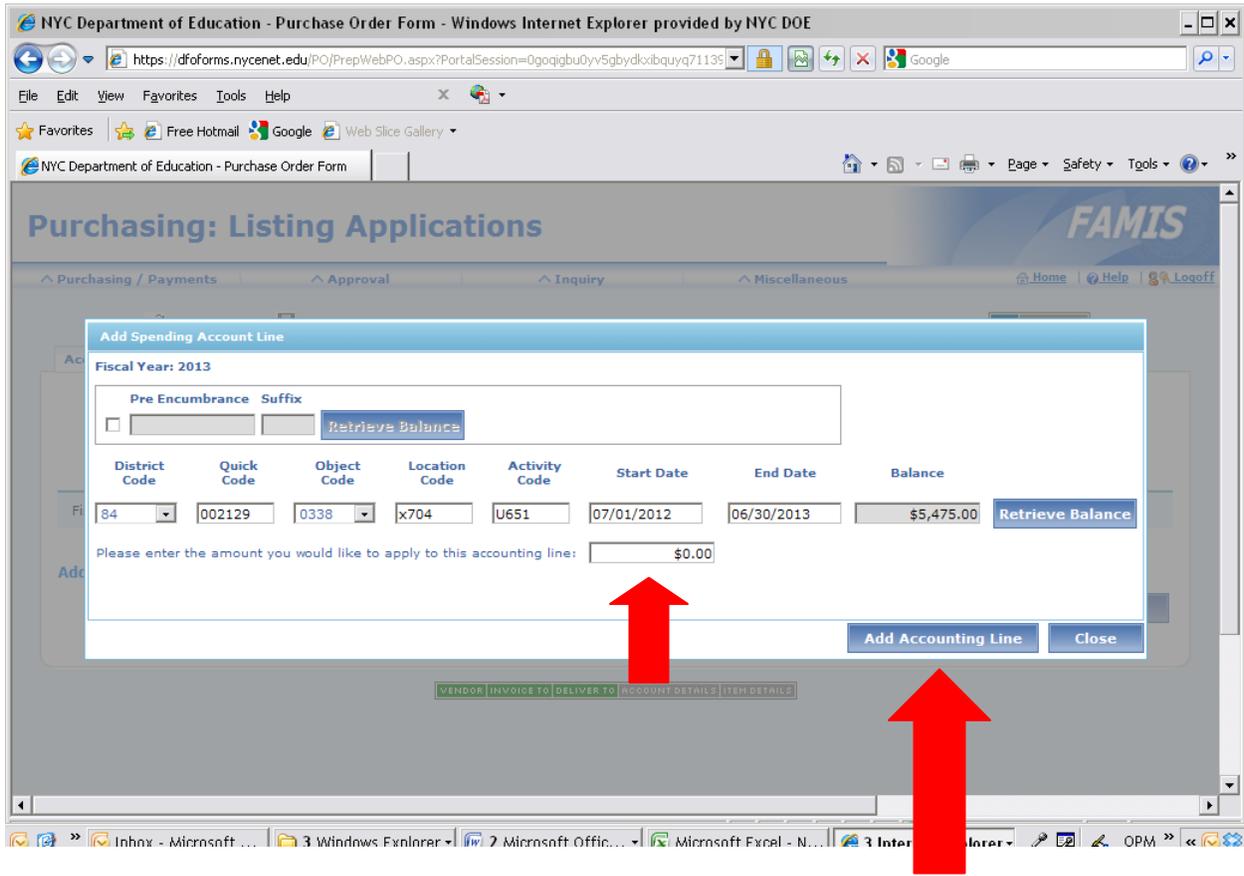
District Code	Quick Code	Object Code	Location Code	Activity Code	Start Date	End Date	Balance	<input type="button" value="Retrieve Balance"/>
84	002129	0338	x704	U651	07/01/2012	06/30/2013	\$5,475.00	<input type="button" value="Retrieve Balance"/>

Please enter the amount you would like to apply to this accounting line:

VENDOR | INVOICE TO | DELIVER TO | ACCOUNT DETAILS | ITEM DETAILS

### How to Create a PO for Library (Cont'd)

15. District code will be pre-populated
16. Quick code: enter 002129
17. Choose the correct object code for what you are purchasing:
  - **0338**
18. Location code should be pre populated with your borough and school number.
19. Activity code- **enter the 4-digit activity codes for your DBN and the object code you are purchasing for in the NYSTL Allocations spreadsheet, located on the Charter Schools Accountability & Support [operations page](#).** (Use control-f to find your school.)
20. Start date and end date can be any dates between July 1, 2012 and June 30, 2013.
21. Click "Retrieve balance."

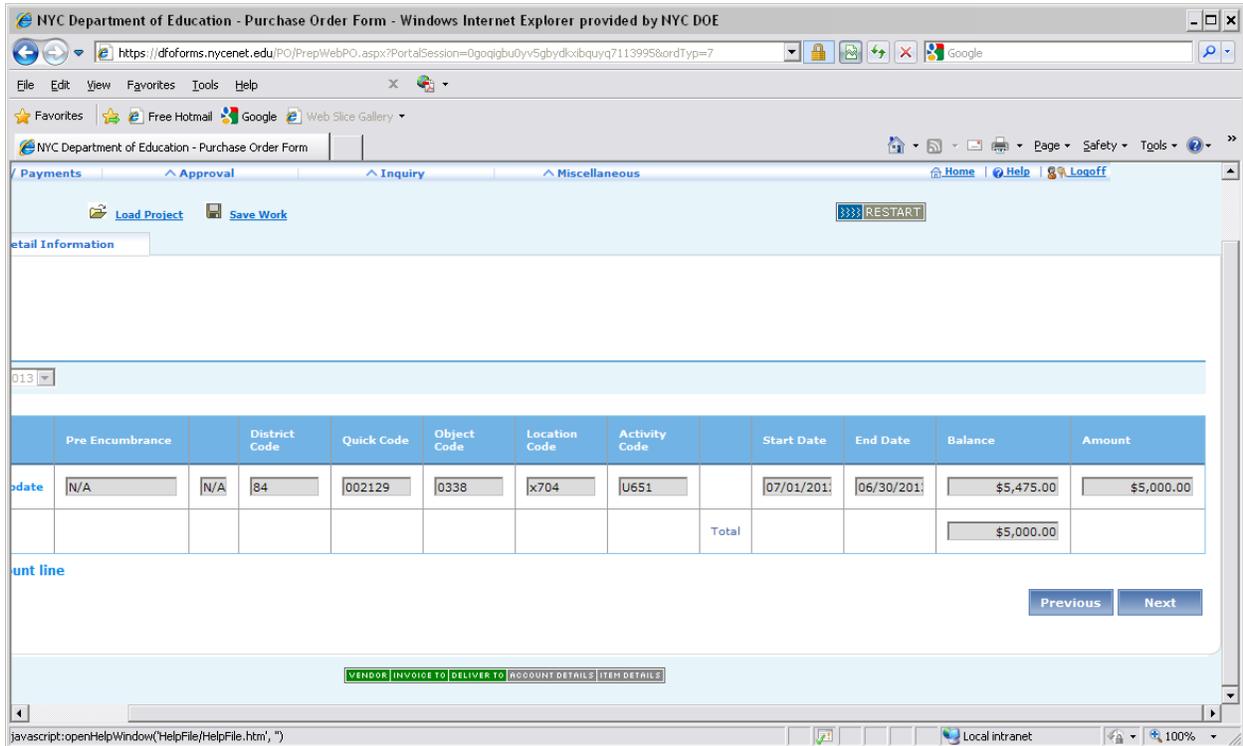


### How to Create a PO for Library (Cont'd)

22. Amount to Apply to this Accounting Line: type in the amount of your order with this vendor. Note that this must be less than the current balance for this object code.
23. Click Add Accounting line. You will see a table appear in the background with this information.
24. If you have [transferred](#) software or textbook funds to the library AND your purchase total is more than your balance with this activity code, you must now AGAIN press "Add Accounting Line" and repeat steps 15 through 23 with the other activity code. For instance, if you started off with \$5,000 in library funds and transferred textbook funds worth \$5,000 and now are about to create a PO for \$6,000, you will need to repeat this process to add the SECOND activity code. The result will be an additional account line appearing.

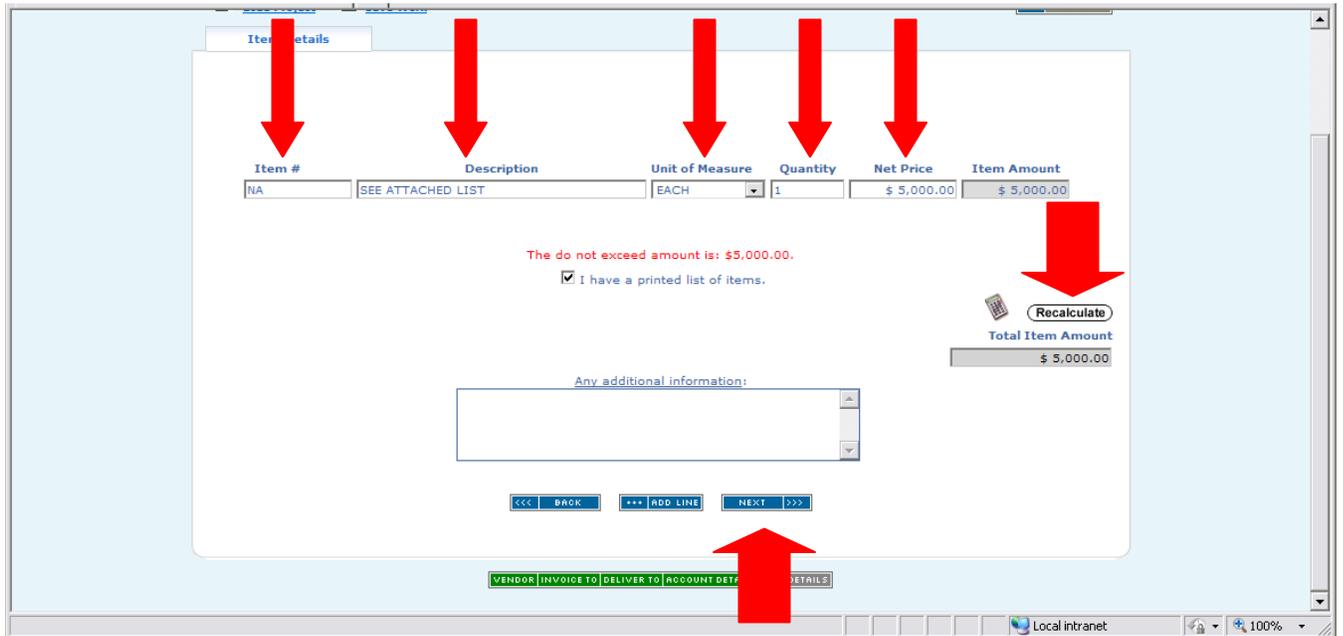
25. Once the table has appeared in the background (with either 1 or 2 lines of activity codes, based on your purchase), click "Close."

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### How to Create a PO for Library (Cont'd)

26. Click next.



### How to Create a PO for Library (Cont'd)

27. Item #: NA
28. Item description: type "See attached list"
29. Unit of Measure: Each
30. Quantity: 1
31. Net Price: the total amount of your order
32. Click "Recalculate." The Item amount should equal the total of your purchases
33. Check the box "I have a printed list of items"
34. Click "Next."

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Load Project Save Work RESTART

**Order Summary**

---

**Vendor Information** [Edit Vendor Information](#)

Vendor Name: BAKER & TAYLOR INC. Vendor Number: BAK013000  
Contract Number: 7209041 Attention: ORDER DEPARTMENT  
Address: 251 MOUNT OLIVE CHURCH ROAD  
Phone: City: COMMERCE State: GA Zip: 30599  
Fax: (800) 775-1100 Toll Free: (800) 775-7480

---

**Invoice Information** [Edit Invoice Information](#)

Invoice to: NYC DOE Payables Attention: Payable Operations  
Address: 65 Court Street Room #: 1502 Phone #: (718)935-2850  
City: Brooklyn State: NY Zip: 11201

---

**Delivery Information** [Edit Delivery Information](#)

Deliver To: CSO Attention: OPERATION  
Address: 52 CHAMBERS ST Room #: Phone #: (212)374-5419  
City: NEW YORK State: NY Zip: 10007  
Instructions: None Complete Delivery By:

---

**Accounting Information** [Edit Accounting Information](#)

Fiscal Year: 2013

Dist.	Quick	Object	Pre-Encumbrance #	Location	Activity	Start Date	End Date	Amount	
1.	84	002129	0338	None	x704	U651	07/01/2012	06/30/2013	5000
<b>Total Accounting Amount</b>									
5000									

---

**Item Detail Information** [Edit Item Detail Information](#)

**I have a do not exceed amount equal to \$5,000.00.**

Item #	Description	U/M	QTY	Price Per Unit	Amount
1.	NA	SEE ATTACHED LIST	EACH	1	\$ 5,000.00
<b>Total Item Amount</b>					
\$ 0.00					

---

**Additional Information:**

**This order must be mailed to the vendor.**

<<< BACK COMPLETE PURCHASE ORDER

### How to Create a PO for Library (Cont'd)

35. Confirm all details on the Order Summary Page
36. Clicking complete purchase order this will create the Purchase Order, and return a "WR" document number. Take note of this number.
37. You should now print and fax this, along with the item list and amounts to the vendor.
38. The approver must now log on to [approve the PO](#).

FAMIS News!

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

9/11: Fy12 Decreases Are Temporarily Suspended, This Includes Fy12 Documents That Rolled Into Fy13

8/20: All Open Fy12 Pre/Encumbrances Were Rolled To Fy13 And Now Appear In Open Document Inquiry. Please Continue To Certify In Document Inquiry Items Delivered By 6/30/12 And Cancel Any Balances In Open Document Inquiry For Goods And Services Not Delivered By 6/30/2012.

\*\*\*\*\*  
\* Fy2013 (Sep) 09 2012 For Input, 03 2013 (Fiscal Period) \*  
\* Fy2012 13 2012 For Inquiry Famis@Schools.Nyc.Gov For Assistance \*  
\*\*\*\*\*

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

Other Links

FY11 school ordering deadlines

FAMIS Guide

FAMIS FAQ's

School Procurement Invoicing

W-9

DFO

Purchasing News

DOE Home

Portal News

Students

Parents

Teachers

Districts/Schools

Statistical Summaries

Add More Links

My Documents	Approvals	Certification of Delivery
	Awaiting My Approval 0	Paid But Uncertified -
	Pending Work Orders 0	Payment Pending Certification -
	Internal PD Requests 0	Total Uncertified PO's -
	Pending Library List 0	
	TRAC 0	

## How to Approve a PO

After a purchase order is created by the Initiator, the Approver must go into FAMIS to approve the purchase order.

1. From the home page, click on "Awaiting My Approval."

[\(back to top\)](#)

## Approval Mailbox

you are looking for Curriculum orders to approve, click the 'Core Curriculum' link under 'Purchasing/Payments'.

Action: **Approve** Signature:  Sign |  District/Location:  Doc Type: **ALL** View Level:

Download Excel Spreadsheet Document:

PreviewDoc #	Init Dist/Loc	Total \$	Doc Type	App Type	Level	Track Code	Notes	Item List	Changed	Created	Days Out	Days In Box
<input checked="" type="checkbox"/> DV130000145	54	209.94	DV	01	200					09/06/12	30	30
<input type="checkbox"/> IL122272019	54	35,800.00	IH	02	200	T2394837				09/29/12	7	7
<input type="checkbox"/> IL122272001	54	6,000.00	IH	03	200	T2394829				09/29/12	7	7
<input type="checkbox"/> IL122272002	54	2,970.00	IH	03	200	T2394830				09/29/12	7	7
<input type="checkbox"/> IL122272012	54	3,060.00	IH	03	200	T2394833				09/29/12	7	7
<input type="checkbox"/> IL122272017	54	1,200.00	IH	03	200	T2394835				09/29/12	7	7
<input type="checkbox"/> IL122272018	54	4,800.00	IH	03	200	T2394836				09/29/12	7	7

### How to Approve a PO (Cont'd)

2. Once in the Approval Box, find the purchase order you have to approve. Verify the Doc #.
3. Click on the check box on the left hand side of the line.
4. Then, go to the ACTION drop down Menu towards the top and click APPROVE.
5. Enter your signature into the Signature field and click SIGN (do not hit ENTER on the keyboard, it will not approve the purchase order, you must click on SIGN).
6. The purchase order will then get various levels of approval and be finally posted.
7. After the order has been approved, please print out copy of purchase order and contact/send to vendor. Contact the vendor directly for questions about delivery timeline.
8. Please take note of ALL PO numbers pending for your school.

**FAMIS Approval Mailbox**

Approval Mailbox | Approval Box | Rejection Box | Approval Tracking

If you are looking for Core Curriculum orders to approve, click the 'Core Curriculum' link under 'Purchasing/Payments'.

Action: Approve | Signature: [ ] | Sign [ ] | Doc Type: ALL | View Level: 200 | Go

Download Excel Spreadsheet

PreviewDoc #	Init Dist/Loc	Total \$	Created	Days Out	Days In Box
<input checked="" type="checkbox"/> DV130000145	54		09/06/12	30	30
<input type="checkbox"/> IL 122272019	54	35,8	09/29/12	7	7
<input type="checkbox"/> IL 122272001	54	6,000.00	09/29/12	7	7
<input type="checkbox"/> IL 122272002	54	2,970.00	09/29/12	7	7
<input type="checkbox"/> IL 122272012	54	3,060.00	09/29/12	7	7
<input type="checkbox"/> IL 122272017	54	1,200.00	09/29/12	7	7
<input type="checkbox"/> IL 122272018	54	4,800.00	09/29/12	7	7

**Change Signature**

Current Signature: [ ]

New Signature: [ ]

Retype Signature: [ ]

Submit

**How to Approve a PO (Cont'd)**

To change the signature, click the icon next to “Sign” and enter in all information. If you are not sure of the signature, you must contact the FAMIS security team at [famis@schools.nyc.gov](mailto:famis@schools.nyc.gov).

[\(back to top\)](#)

NYC Department of Education  
Mayor's Office | DOE | DOE Email | Personnel Directory  
Welcome, PRICE, LAURIE Edit Profile | Sign Out  
1/13/2012 11:43:05 AM

**Purchasing / Payments**

- Adjustments & Payments
- Cert. Of Delivery
- Core Curriculum
- Courier: Special Delivery
- Financial Processing
- Mtac
- Non-List Requisition
- PA/PTA Grant Program
- Pre-Encumbrance
- Procurement Card
- Purchasing
- Report Card Ordering
- SIPP
- Voucher

**Approval**

**Inquiry**

**Miscellaneous**

**FAMIS News!**

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

1/13: Due To City Maintenance Famis Will Be Unavailable At 6:00 Pm. Error-Free Transactions Will Post Once The City System Resumes.

\*\*\*\*\*  
\* Fy2012 (Jan) 01 2012 For Input, 07 2012 (Fiscal Period) For Inquiry \*  
\* Fy2011 13 2011 For Inquiry Famis@Schools.Nyc.Gov For Assistance \*  
\*\*\*\*\*

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

**Other Links**

- FY11 school ordering deadlines
- FAMIS Guide
- FAMIS FAQ's
- School Procurement Invoicing
- W-9
- DFO
- Purchasing News
- DOE Home
- Portal News
- Students
- Parents
- Teachers

My Documents	Approval	Certification of Delivery
Posted 42	Awaiting My Approval 7	Paid But Uncertified -
Pending Approval 0	Pending Work Orders 0	Payment Pending -

## Certifying Your PO After Purchase

This should be done for EACH PO, once the items have been received. Certifying the PO facilitates payment to vendors. If payment is not made to the vendor through the FAMIS system, vendors will be referred directly to the school for alternate form of payment.

Log into FAMIS and click on "Inquiry."

NYC Department of Education  
 Mayor's Office | DOE | DOE Email | Personnel Directory  
 Welcome, PRICE, LAURIE | Edit Profile | Sign Out  
 1/13/2012 11:44:20 AM

**FAMIS News!**

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

1/13: Due To City Maintenance Famis Will Be Unavailable At 6:00 Pm. Error-Free Transactions Will Post Once The City System Resumes.

\*\*\*\*\*  
 \* Fy2012 (Jan) 01 2012 For Input, 07 2012 (Fiscal Period) For Inquiry \*  
 \* Fy2011 13 2011 For Inquiry Famis@Schools.Nyc.Gov For Assistance \*  
 \*\*\*\*\*

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- DFO
- Purchasing News
- DOE Home
- Portal News
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- Parents
- Teachers

My Documents		Approval		Certification of Delivery	
Posted	42	Awaiting My Approval	7	Paid But Uncertified	-
Pending Approval	0	Pending Work Orders	0	Payment Pending	-

### Certifying Your PO After Purchase (Cont'd)

Click on "Document Inquiry."

[\(back to top\)](#)

**Document Inquiry** FAMIS

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

Document #    Check #    Contract #    Invoice #

Document #:

Posted By:	Posted Date:	Posted Time:
Fiscal Year:	Contract #:	Trans Code:
Third Party Vendor:	Single Check Payment:	Hold Check Indicator:
Vendor #:	Vendor Name:	Trans Desc:
Doc Reference:	Cont/Check #: <input type="button" value="Check Fee"/>	Bank #:
Invoice Date:	Invoice #:	
Quick Code:	Object Code:	Location Code:
Activity Code:	Program Reporting Code:	
Start Date:	End Date:	UOA:
Cert. Ind.:	Cert. Amount:	

View Details | View Summary

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

### Certifying Your PO After Purchase (Cont'd)

Enter in your Document number (the PO number, which will start with WR).

Click "Inquire."

# Document Inquiry

**FAMIS**

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

Document # | 
  Check # | 
  Contract # | 
  Invoice #

**This document was rolled into the next fiscal year. [Click Here](#) to display the rolled balances.**

Document #: WR1245837 01 | 01 | [Inquire](#) | [Prior](#) | [Next](#) | [View Notepad](#)

Posted By: BROWN,TSEHAIA	Posted Date: 04/18/2011	Posted Time: 11:20 AM
Fiscal Year: 2011	Contract #: 7000642	Trans Code: 302
Third Party Vendor:	Single Check Payment:	Hold Check Indicator:
Vendor #: PRE105000 01	Vendor Name: PEARSON EDUCATION, INC.	Trans Desc: ECATALOG-ITEM-DRIVEN
Doc Reference:	Cont/Check #: 7000642 <a href="#">Check Fee</a>	Bank #:
Invoice Date:	Invoice #:	
Quick Code: 84002129	Object Code: 0337	Location Code: K538
Activity Code: 0000	Program Reporting Code:	
Start Date: 04/15/2011	End Date: 04/15/2011	UOA: 474
Cert. In: <b>Not Received</b> <a href="#">Certify Document</a>	Cert. Amount: N/A	

View Details   View Summary	Post Date	Period	T/C	Document No.	Check No.	Bank No.	Due Date	Description	Amount
Original Amt: \$									2,058.70
Adjustments: \$									-2,058.70
Liquidations: \$									.00
<b>Balance: \$</b>									<b>.00</b>
Payments: \$									.00

## Certifying Your PO After Purchase (Cont'd)

Click "Certify Document."

[\(back to top\)](#)

Document #	Fiscal Year	Change Notice	Encumbered Amount	Balance	Rec. Amount	Prior Rec. Report
WR3001252	2013	None	\$12,127,861.00	\$7,956,197.94	\$12,127,861.00	Show

Item #	Description	U/M	Qty Ordered	Prior QTY Received	New Qty Received	Net Price	Amount Ordered	Amount Received
N/A	FY13 SPED SERVICES	EACH	1	1	<input type="text" value="0"/>	\$943,120.00	\$943,120.00	\$0.00
N/A	FY13 GENED SERVICES	EACH	1	1	<input type="text" value="0"/>	\$11,184,741.00	\$11,184,741.00	\$0.00
Number Of Item(s): 2						\$12,127,861.00	\$12,127,861.00	\$0.00

Comments and feedback (maximum 800 characters):

Received Date:  Examined By:

Recalculate

### Certifying Your PO After Purchase (Cont'd)

Choose Received in Full, Partially Received, or Not Received. If partially received, you will be asked to fill in the quantity received.

Enter in the date the materials were received, and the name of who examined the materials.

Press Save.

Repeat this process for all PO's created during the fiscal year.

Please mail a copy of all certified invoices to:

NYC Department of Education  
Attention: Office of Payable Operations  
65 Court Street  
Room 1502  
Brooklyn, NY 11201

Please make sure you keep a copy of the invoice for your records. **Please do not send copies of invoices to our office.**

**NYC Department of Education** **FAMIS**  
 Mayor's Office | DOE | DOE Email | Personnel Directory 10/6/2012 4:56:38 PM  
 Welcome, LAURIE PRICE [Edit Profile](#) | [Sign Out](#)

**FAMIS News!**  
 \*\*\*Famis News\*\*\*  
 9/11: Fy12 Decreases Are Temporarily Suspended, This Includes Fy12 Documents That Rolled Into Fy13  
 8/20: All Open Fy12 Pre/Encumbrances Were Rolled To Fy13 And Now Appear In Open Document Inquiry. Please Continue To Certify In Document Inquiry Items Delivered By 6/30/12 And Cancel Any Balances In Open Document Inquiry For Goods And Services Not Delivered By 6/30/2012.  
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 \* Fy2013 (Sep) 09 2012 For Input, 03 2013 (Fiscal Period) \*  
 \* Fy2012 13 2012 For Inquiry Famis@Schools.Nyc.Gov For Assistance \*  
 \*\*\*\*\*  
 Please Click On The Broadcast Message On The Left Side For Detail Broadcast Message.

My Documents	Approval	Certification of Delivery
Posted 0	Awaiting My Approval 0	Paid But Uncertified -
Pending Approval 0	Pending Work Orders 0	Payment Pending Certification -
Failed 0	Internal DR Requests 0	Total Identified DRs 0

## How to Search for a PO

Click on “Open Document Inquiry.”

[\(back to top\)](#)

The screenshot shows the 'Open Documents Inquiry' page in the FAMIS system. The page has a blue header with the 'FAMIS' logo and navigation links for 'Home', 'Help', and 'Logout'. Below the header is a breadcrumb trail: 'Purchasing / Payments > Approval > Inquiry > Miscellaneous'. The main content area is titled 'Open Documents Inquiry' and contains three search criteria panels: 'Time Period', 'Accounts', and 'Other'. The 'Time Period' panel has 'Fiscal Month' set to 'YTD' and 'Fiscal Year' set to '2013'. The 'Accounts' panel has 'District' set to '84', 'Quick Code' as an empty field, 'Location' as a dropdown, 'Activity' set to 'X704', and 'U.O.A.' as an empty field. The 'Other' panel has 'G/L Account' set to 'Encumbrances', 'Doc Prefix' as a dropdown, 'Fund' as a dropdown, and 'Vendor #' as an empty field. At the bottom of the search area are two buttons: 'Retrieve' and 'Clear'.

### How to Search for a PO (Cont'd)

Choose the correct location code. Make sure that “G/L Account” is selected to “Encumbrances.”

Click “Retrieve.”

You should now see a list of all PO's that are open for your school. No actions should be taken on any PO from this screen.

## Resources

- a) FAMIS PORTAL LINK:  
<https://dfoforms.nycenet.edu/FamisPortal/login.aspx?Sessiontoken=5zbm1r450dg1pd55nza0aqvh>
- b) FAMIS for Beginners: <http://schools.nyc.gov/Offices/DCP/FamisforBeginners.pdf> (please disregard contact information on pages 3-7)
- c) SHOPDOE/e-catalog: [Shopdoe.com](http://shopdoe.com)
- d) FAMIS Online Tour: <http://schools.nyc.gov/offices/DCP/MostPopularClicks/menu.html>
- e) NYCDOE DIVISION OF CONTRACTS & PURCHASING:  
<http://schools.nyc.gov/Offices/DCP/default.htm>
- f) A more detailed explanation of NYSTL Guideline Topics can be found on the DOE website at:  
<http://schools.nyc.gov/Offices/DCP/Publications/NYSTLFLAGS.htm>

