Department of Education
Carmen Fariña, Chancellor

FISCAL YEAR 2016

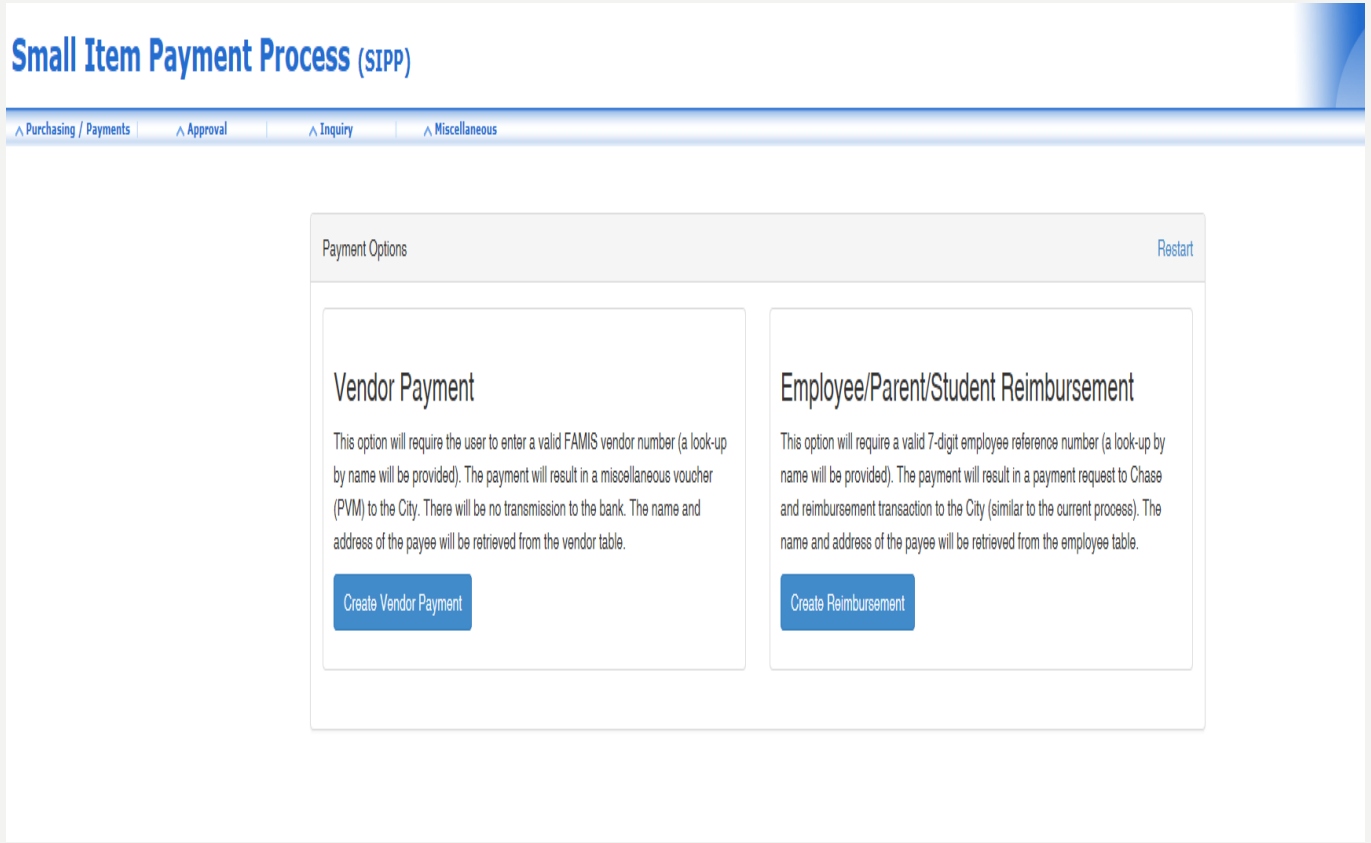
SIPP/TRAC – ENHANCEMENTS (PHASE ONE)

SIPP Enhancement Summary

- **School SIPP Approval Threshold**
  - Reduced from $500 to $250
    - SIPPs greater than $250 will require final approval by the BFSCs
- **Sales Tax Exemption**
  - DOE tax exemption link added
- **Automation of the Bidding Form**
  - SIPPs greater than $250
- **Upload Supporting Documentation**
  - Invoices, receipts, agendas, class rosters, etc. must be uploaded in order to initiate a SIPP and a TRAC
- **New Object Codes**
  - New sub object codes for 451,452 and 489

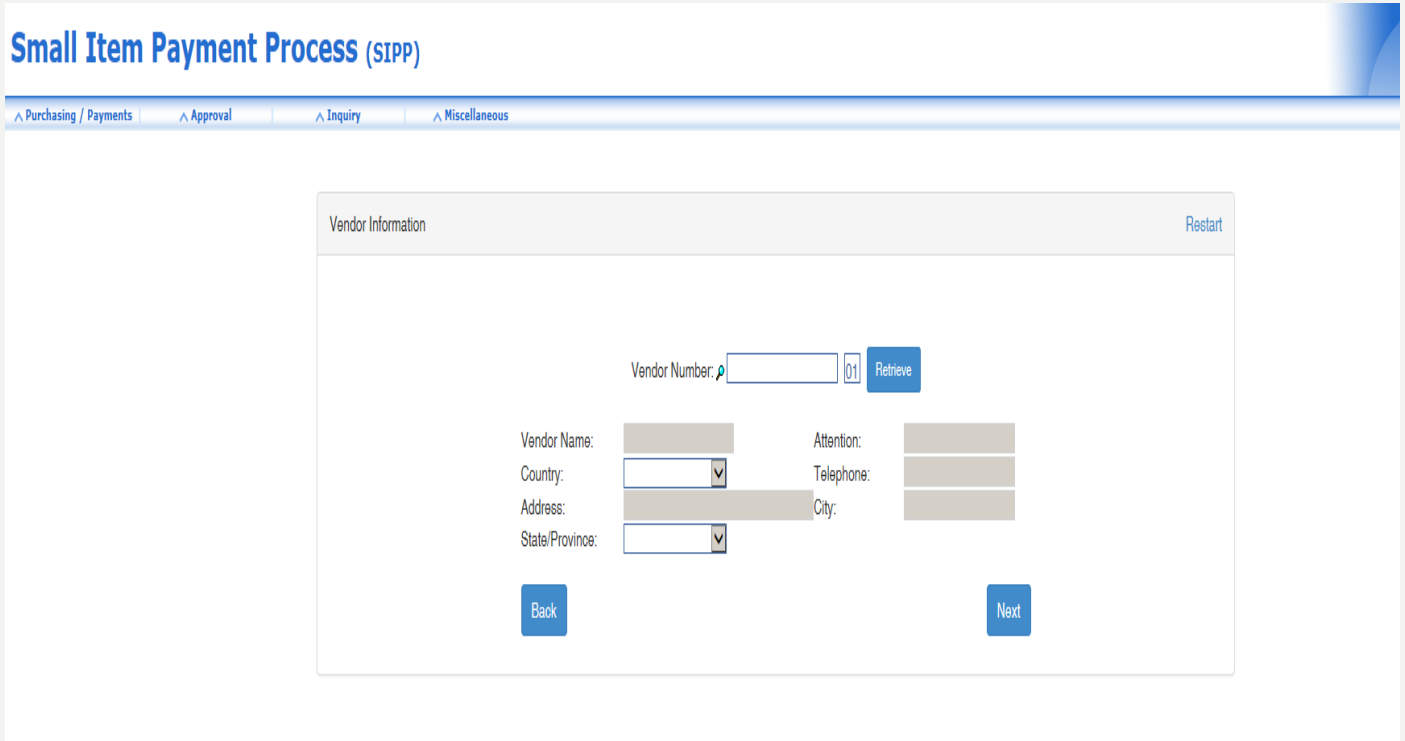
SIPP ENHANCEMENTS

In response to a New York City Comptroller SIPP audit, the following enhancements have been implemented.



SIPP – PROCESSING

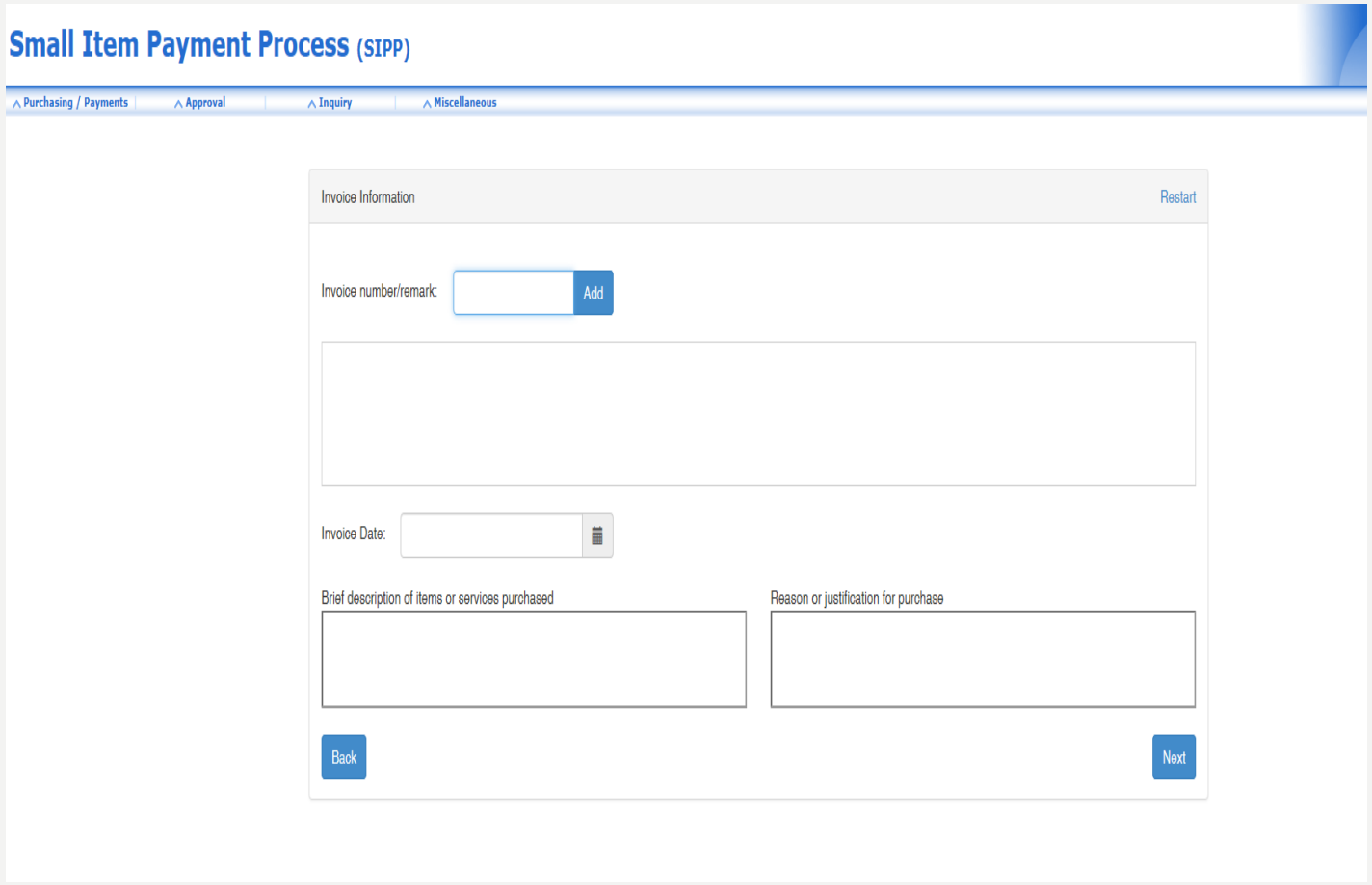
Select the appropriate payment option



SIPP – PROCESSING (CONTINUED)

Enter the Vendor Number

Click, ***NEXT***



SIPP – PROCESSING (CONTINUED)

Enter the following information:

Invoice Number / Remark, click add

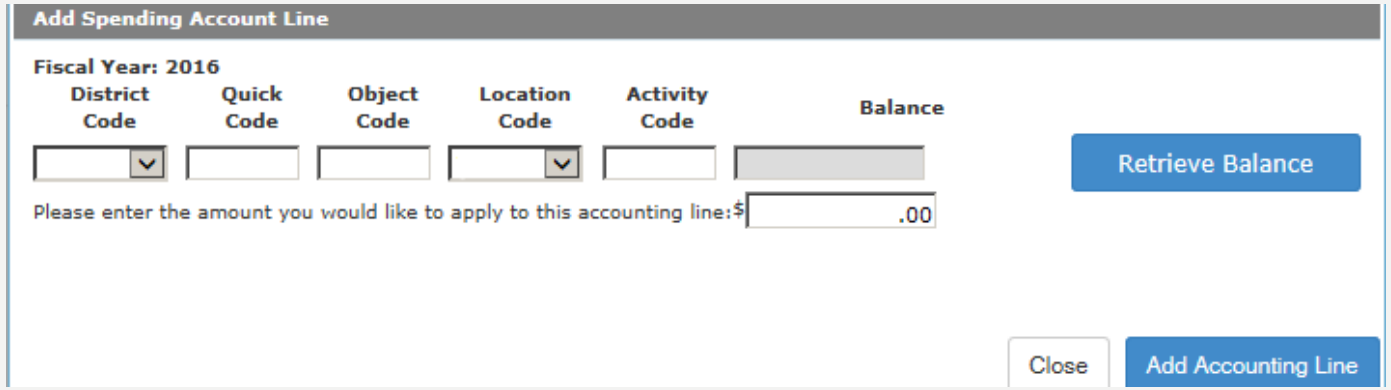
Invoice date

Brief description of items / services purchased

Reason / Justification for Purchases

Click, ***NEXT***

SIPP – PROCESSING (CONTINUED)



Enter the following Accounting information:

District Code

Quick Code

Object Code

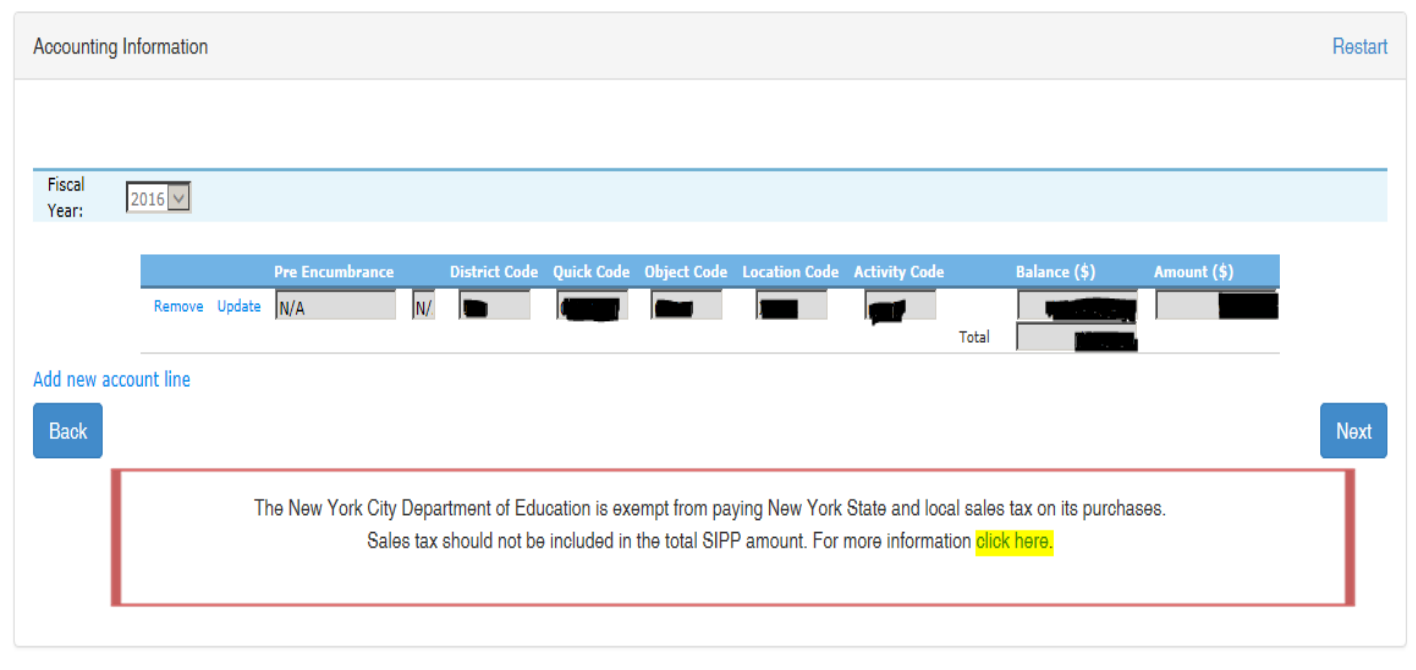
Location Code

Activity Code

Click, ***Retrieve Balance*** (to ensure there is sufficient funding for the payment)

Once funding is verified

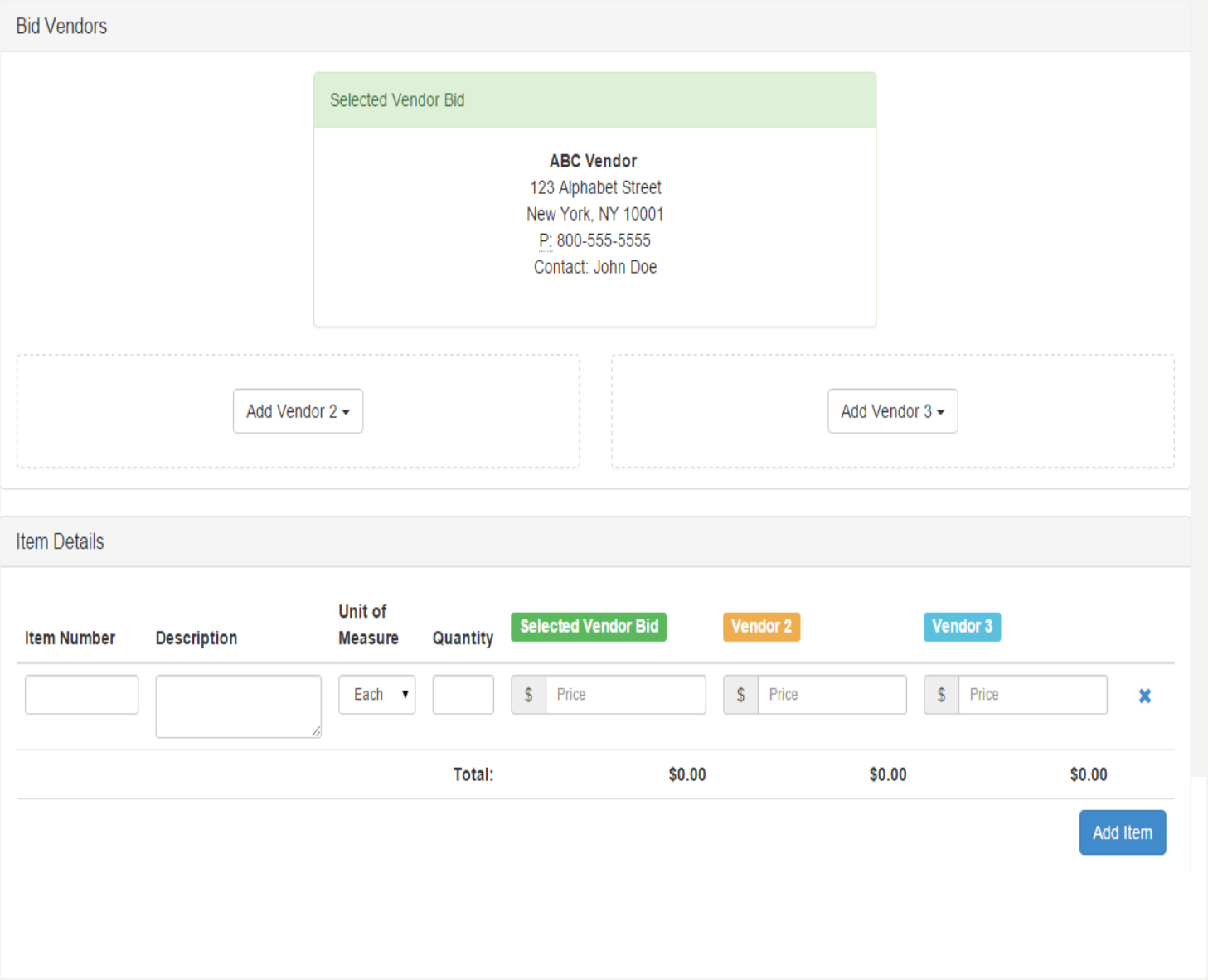
Click, ***Add Accounting Line***



SALES TAX (NEW FEATURE)

The New York City Department of Education is exempt from paying New York State and local sales tax on their purchases.

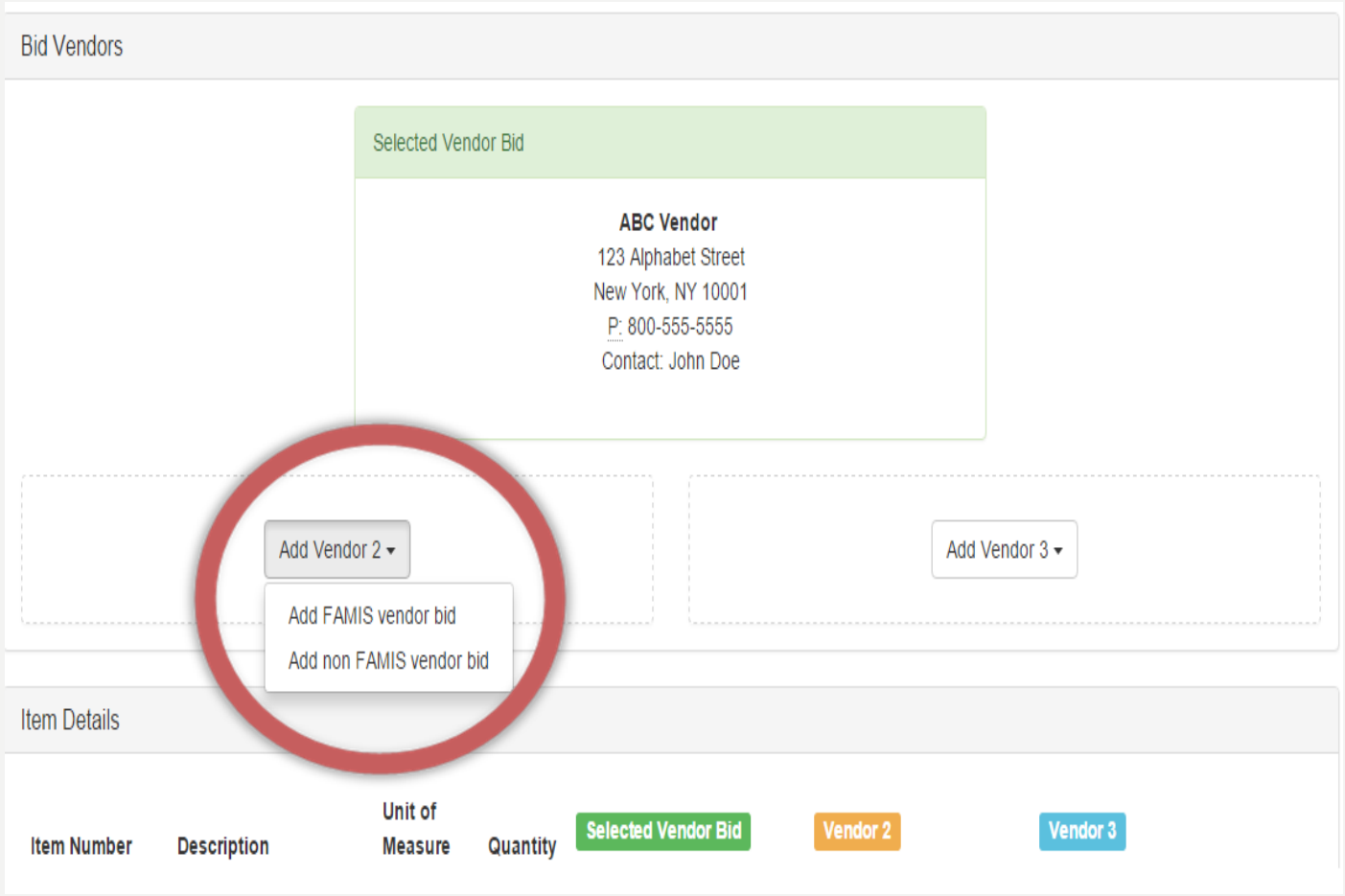
Click on the link and provide the vendor with a tax exemption letter



SIPP – BID FORM (NEW FEATURE)

Bidding will be required for purchases greater than $250.

The user must enter the two additional bidding vendors and the item information.



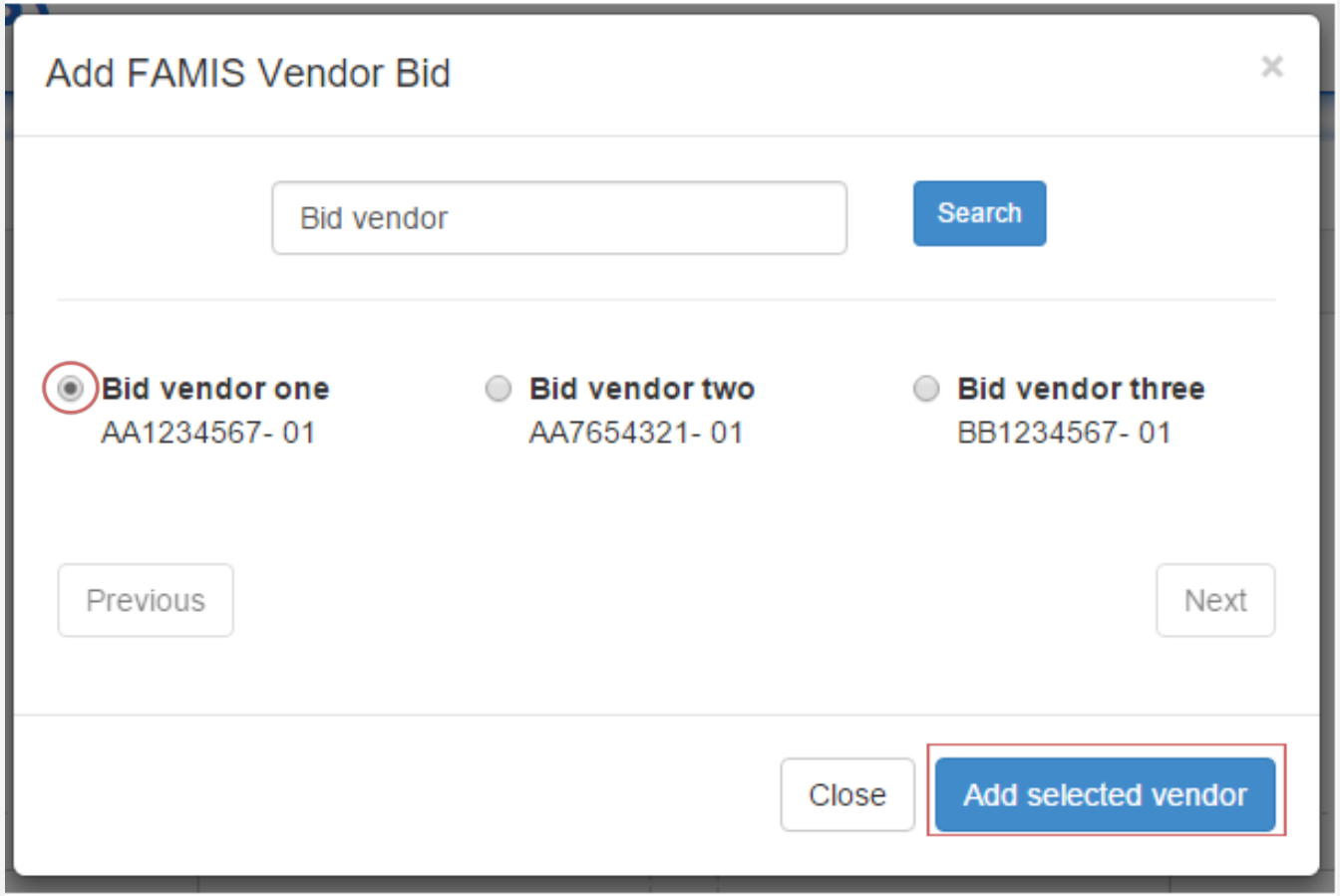
ADDING VENDORS (NEW FEATURE)

To add additional vendors, users will choose either:

Add FAMIS vendor bid

or

Add non FAMIS vendor bid

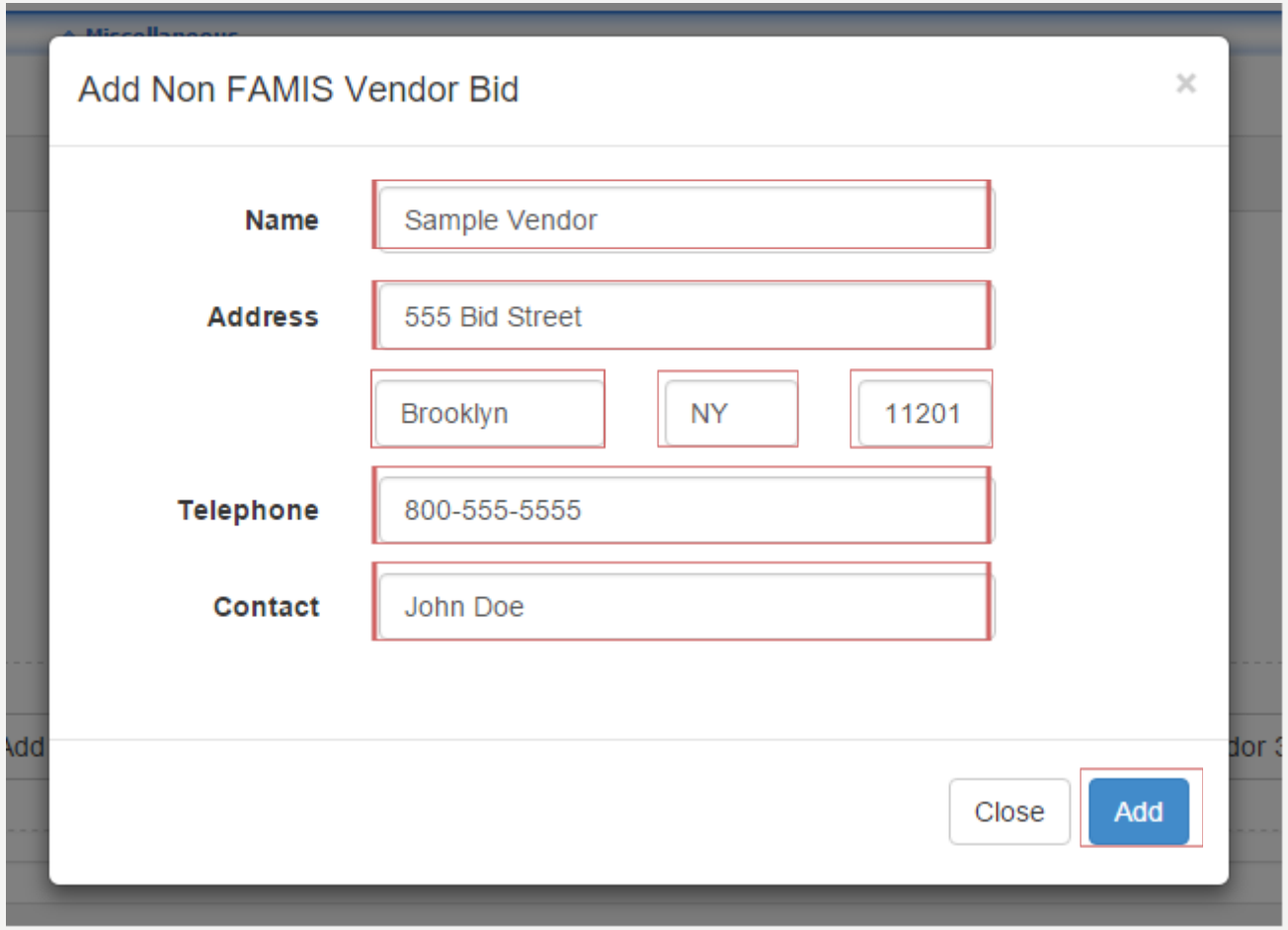


ADDING FAMIS VENDORS BID (NEW FEATURE)

The Add FAMIS Vendor Bid option enables the user to search and choose from existing FAMIS vendors.

Select the vendor

click the ***add select vendor*** button



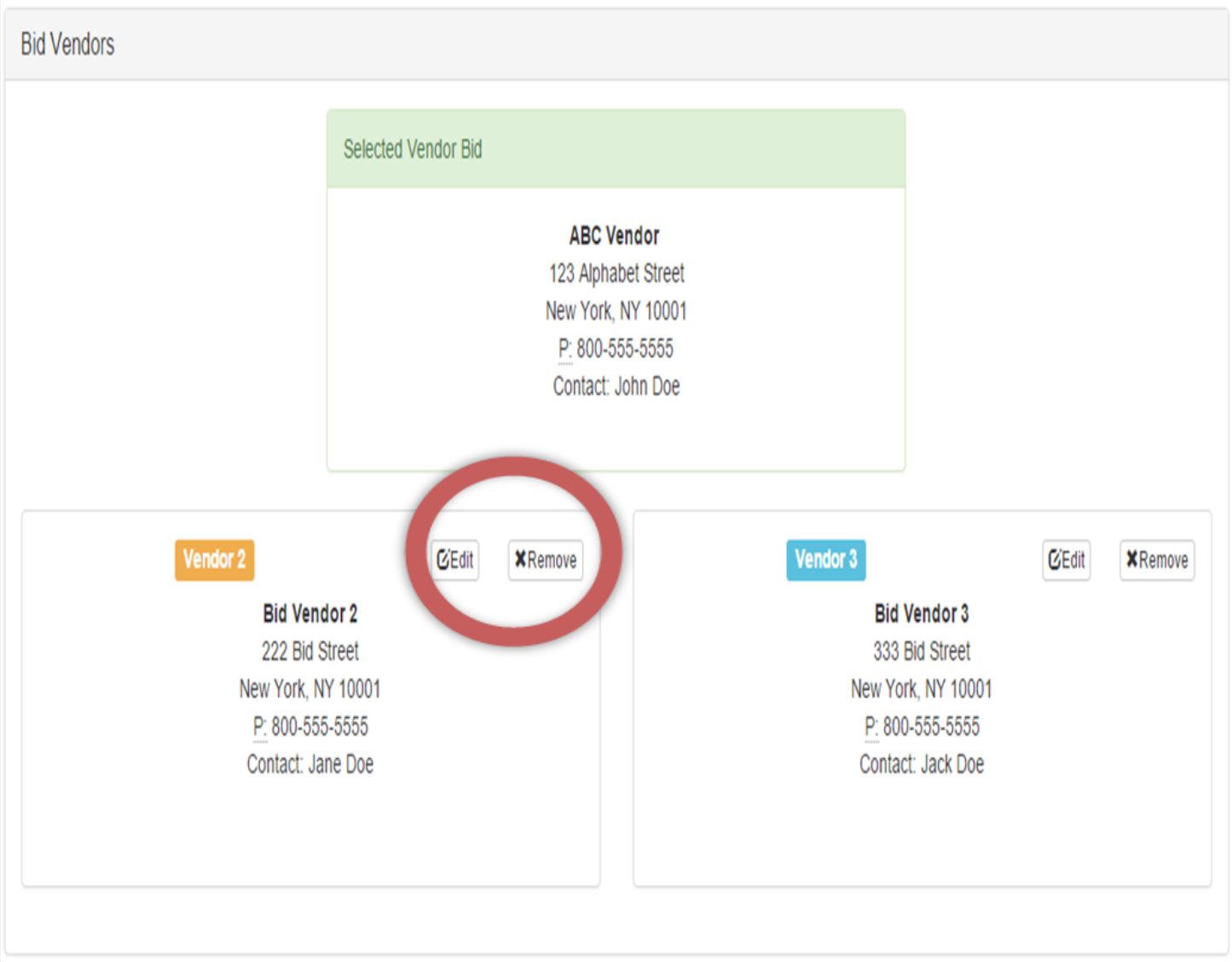
ADDING NON FAMIS VENDOR BID (NEW FEATURE)

The user can also add a Non FAMIS Vendor.

Please note:

Adding a Non FAMIS Vendor will not add the vendor to FAMIS.

This is strictly for bidding and solicitation purposes only.



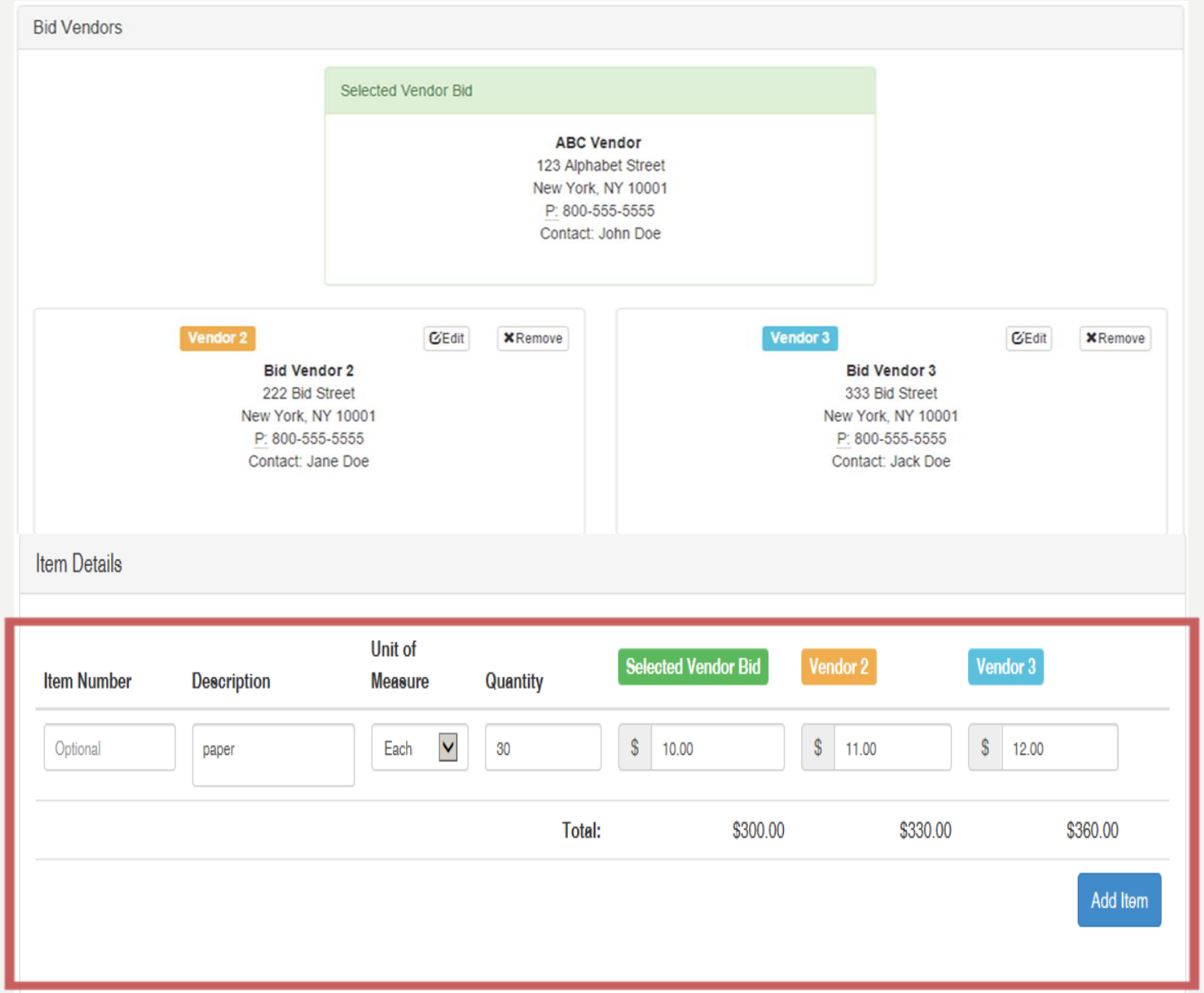
EDIT /REMOVE BID VENDORS (NEW FEATURE)

Once added, the user can edit or remove the vendor bid.

Please note:

The edit button will only appear for Non-FAMIS Vendor bids.

ADDING ITEMS (NEW FEATURE)



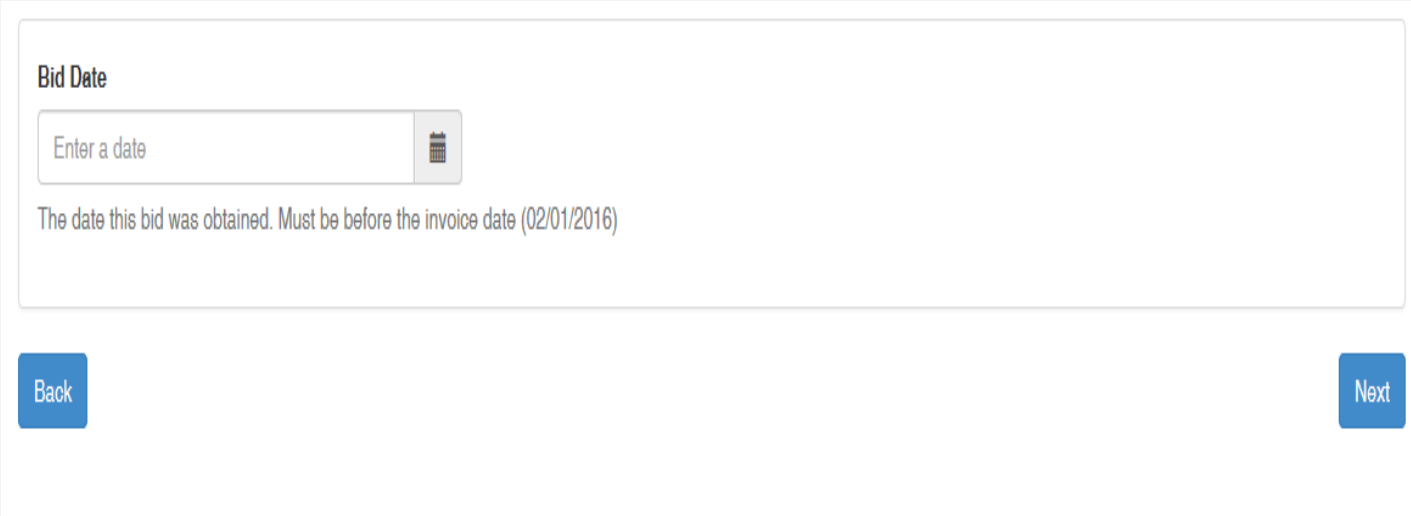
Users must complete the Item Details section by entering:

- Item number (optional)
- Description (required)
- Unit of Measure
- Quantity (required)
- * Selected Vendor Bid amount (required)
- Vendor 2 bid amount (required)
- Vendor 3 (required)

Add item = allows the user to insert another item row

Click, ***next*** to continue

*The amount must equal the amount that was entered on the accounting information page

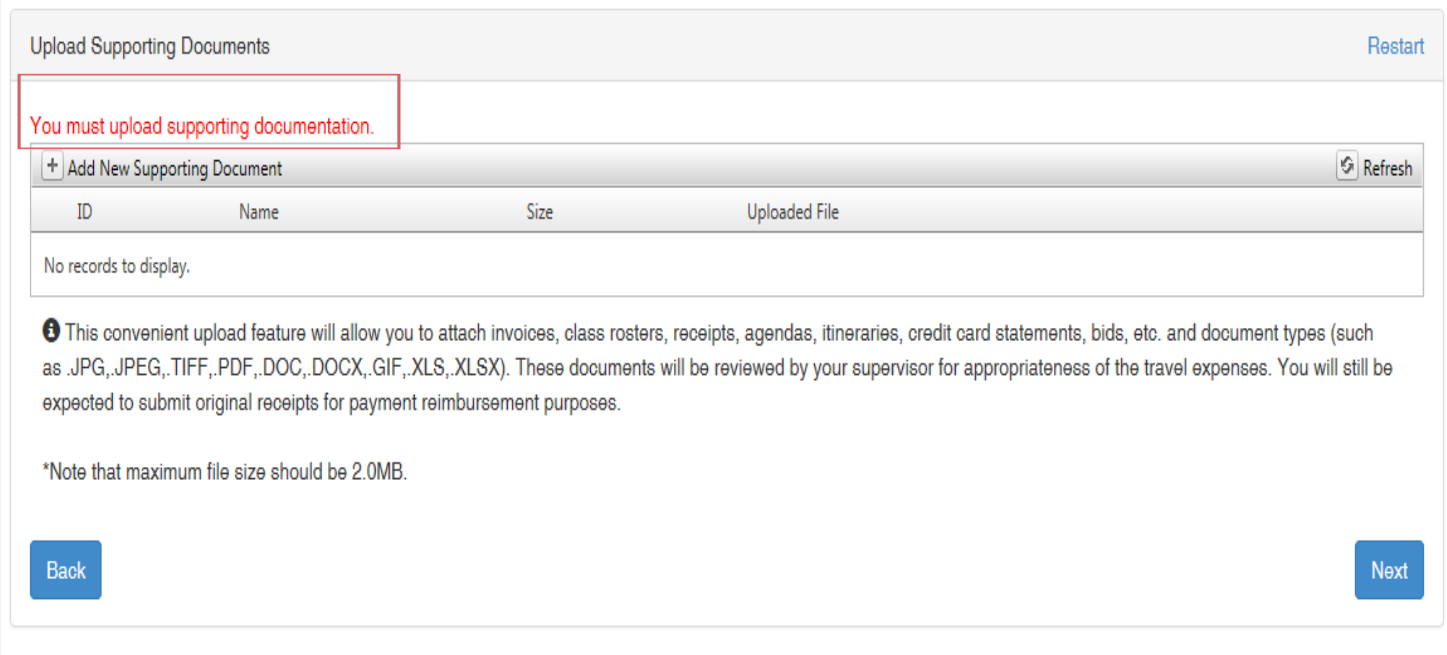


BID DATE (NEW FEATURE)

After entering the item information, the user is required to enter the bid date.

Please note:

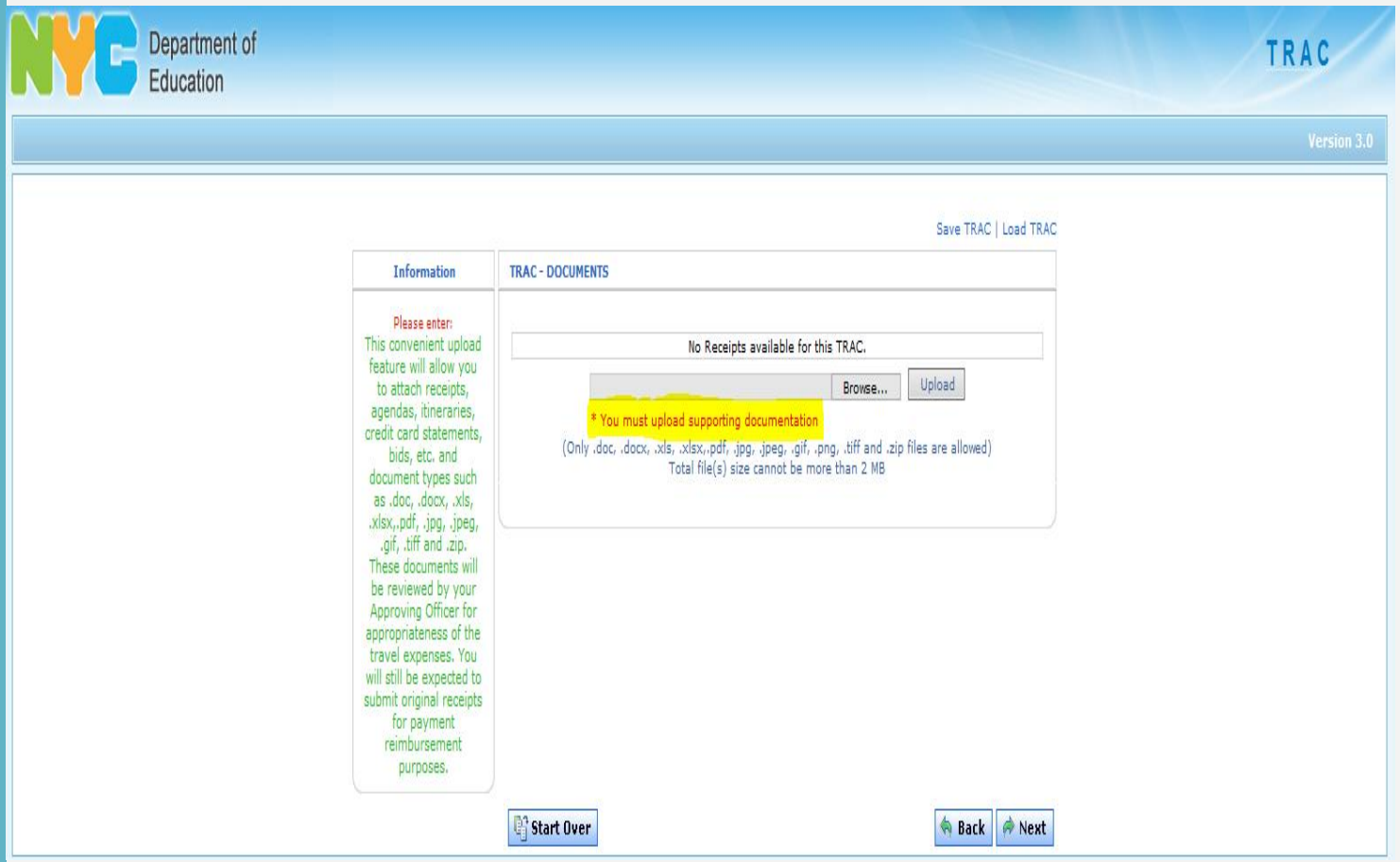
The bid date must be prior to the invoice date (slide 5)



SIPP DOCUMENTATION UPLOAD (NEW FEATURE)

Once the vendor bid form has been completed, the user must upload the supporting documentation (invoices, receipts, agendas, class rosters, etc.) in order to initiate a SIPP.

TRAC DOCUMENTATION UPLOAD (NEW FEATURE)



Uploading supporting documentation is also required for DOE employees who are requesting travel related reimbursements through the Travel Reimbursement Approval Certification, TRAC application.

UPLOAD DEVICES

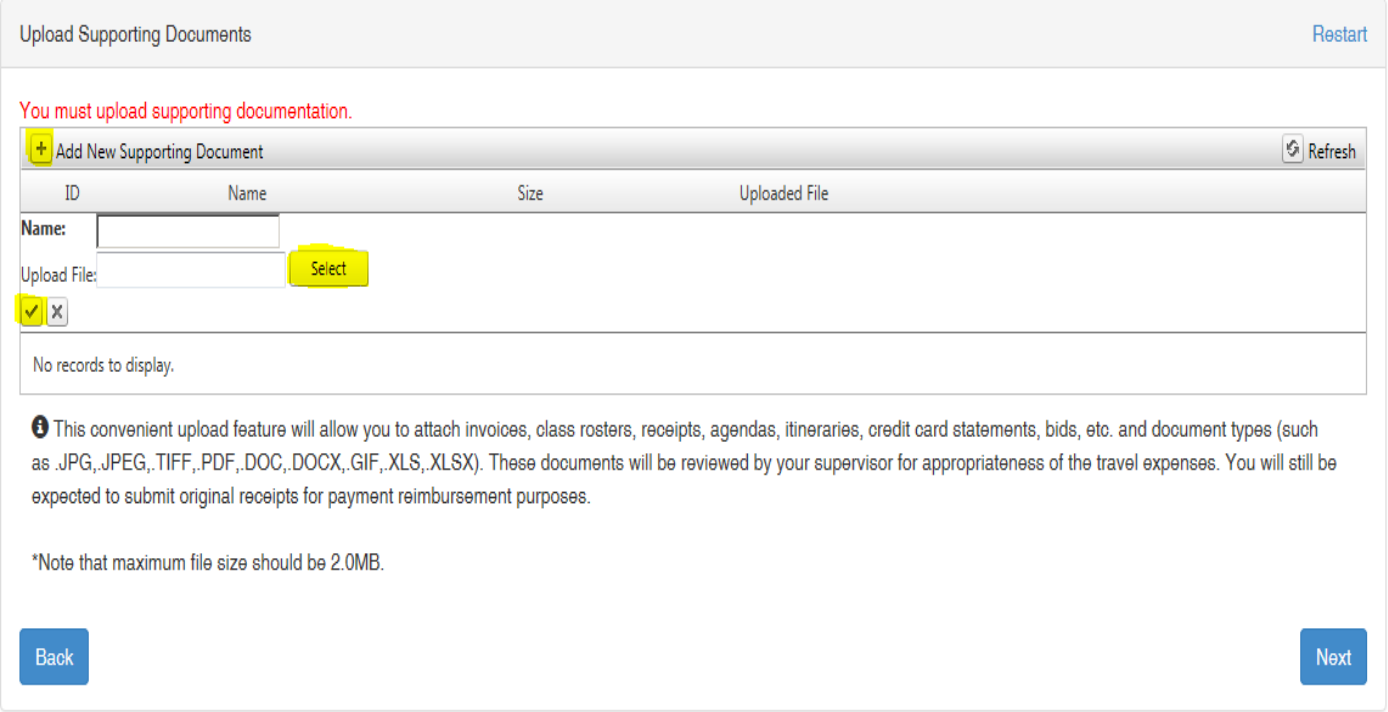
In order to "upload" the mandatory documentation in support of the SIPP/TRAC requirements the following are examples of the device types that can be used.

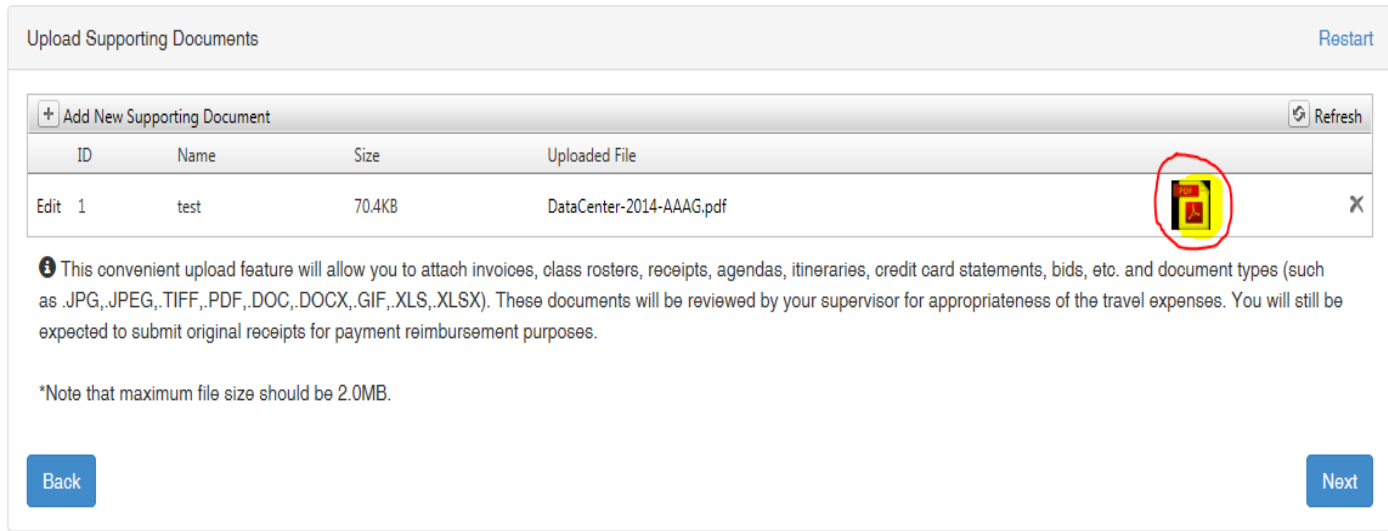
Once a digital image of the documentation is taken, the image must be saved on a computer drive so that it can be uploaded to the SIPP and TRAC applications

Image Scanner - often abbreviated to just **scanner**, is a device that optically scans images, and converts them into a digital image. Commonly used in offices are variations of the desktop ***flatbed scanner*** where the document is placed on a glass window for scanning and usually is dedicated to one computer.

A **multifunction** (MFD) is a **device** that performs a variety of functions that would otherwise be carried out by separate devices. As a rule, a **multifunction devices** can include the following: a) printer, b) scanner, c) copier and d) fax or some combination of these functions.

Digital cameras can be used for the same purposes as dedicated scanners, and most **Smart Phones** also contain a digital camera. The image taken with the digital camera or smart phone could be transferred from the device to a computer using a either a wireless network connection, or a USB cable connection directly plugged into the device and connected to a PC to physically transfer the images. In addition, the digital images could also be emailed then retrieved and saved by the email recipient.





HOW TO UPLOAD SIPP DOCUMENTATION

Steps

1. click, Add New Supporting Document
2. Type the name of the document in the Name: ***text box***
3. Click, Select to choose the SIPP document to upload
4. click ✓ to insert the document
5. click, Next

SIPP PROCESSING (CONTINUED)

Bid Summary

Edit Bid Summary Details

Bid Date: 01/31/2016

Other Bid Vendors

Vendor:	2	Vendor:	3
Vendor ID:	Vendor	Vendor ID:	Vendor
Vendor name:	bid vendor 2	Vendor name:	Bid Vendor 3
Address:	222 Bid street new york , ny 10001	Address:	333 Bid Street New York , NY 10001
Contact:	Jane Doe	Contact:	Jack Doe
Telephone:	800-555-5555	Telephone:	800-555-5555

Item Details

Item Number	Description	UOM	Quantity	Awarded Vendor Price	Vendor2 Price	Vendor3 Price
	paper	EACH	30	$10.00	$11.00	$12.00

Account Information

Edit Accounting Information

Fiscal year: 2016

#	District	Quick Code	Object Code	Location Code	Activity Code	Amount ($)
1.	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	300

Total: $300

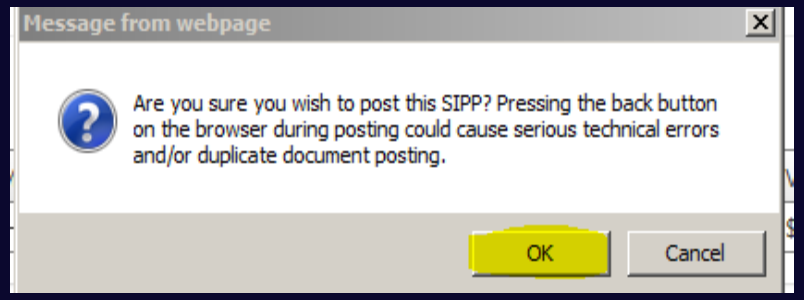
Select Initiating Department: [redacted]

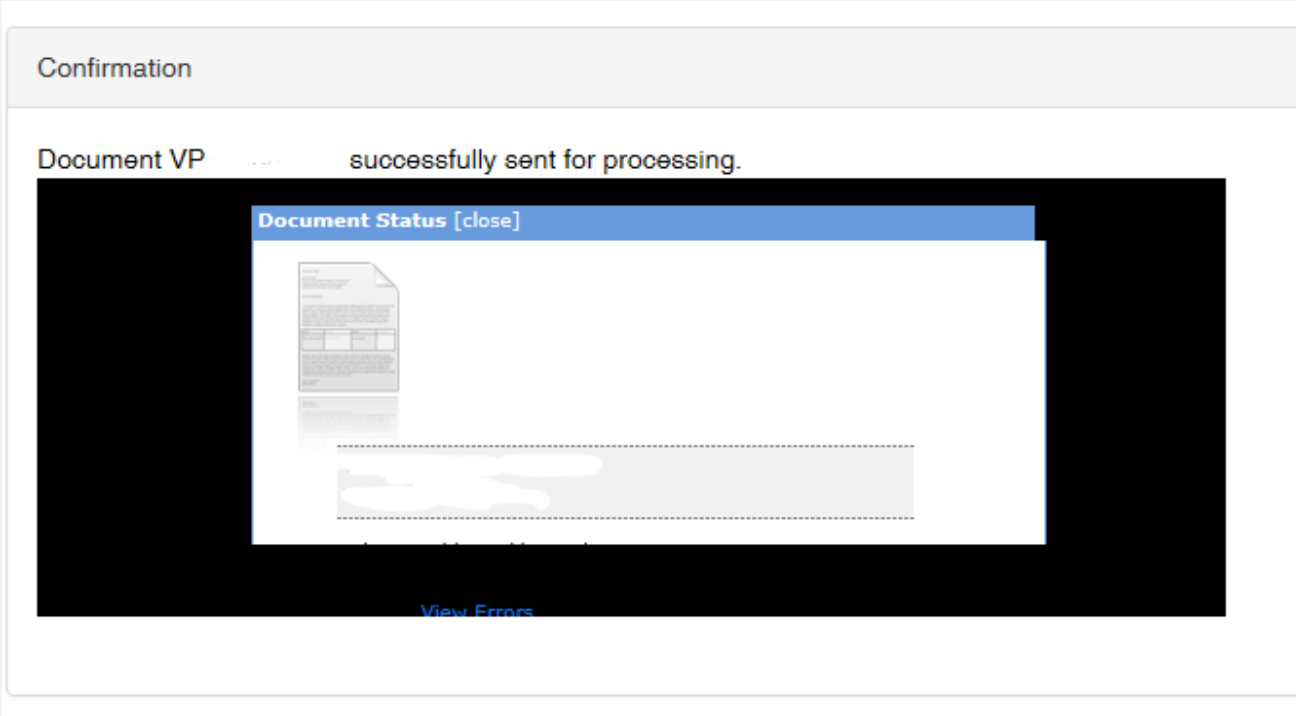
Back

Submit

Click, Submit

Click, ***OK*** to initiate the SIPP

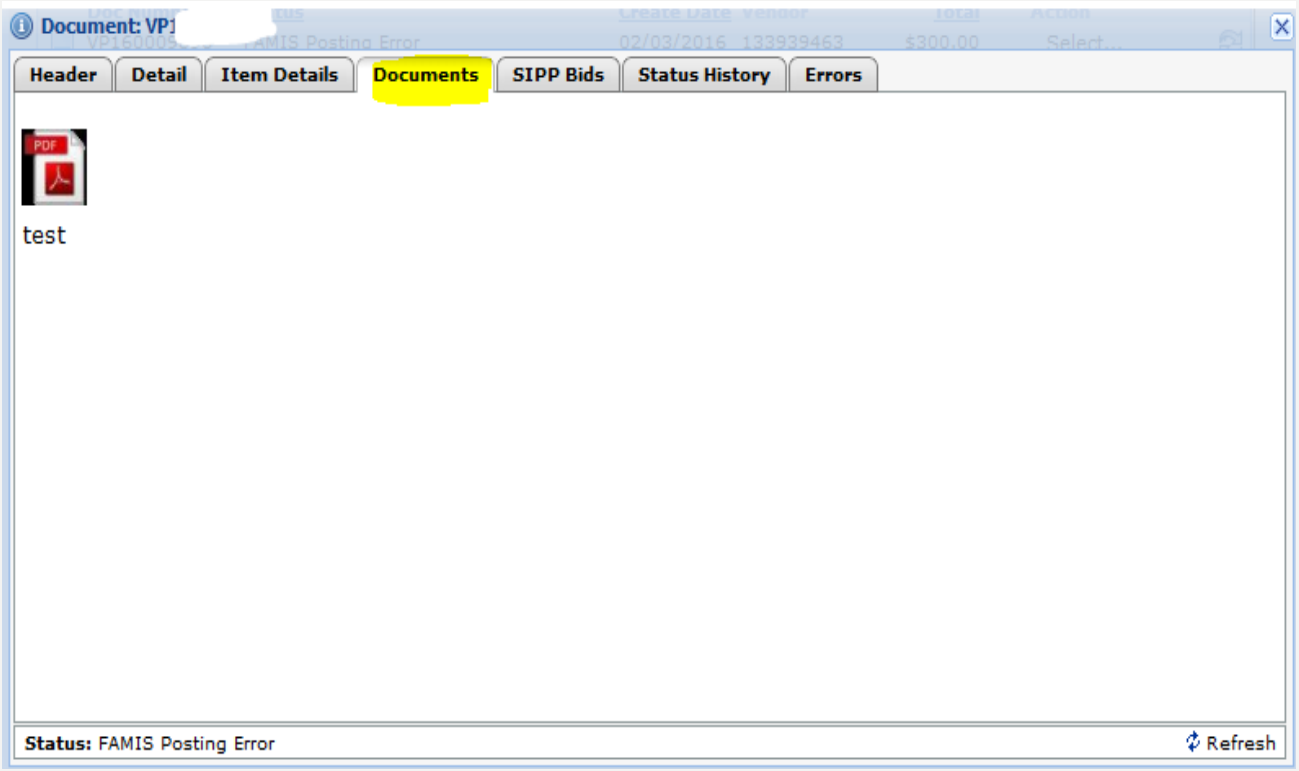




SIPP

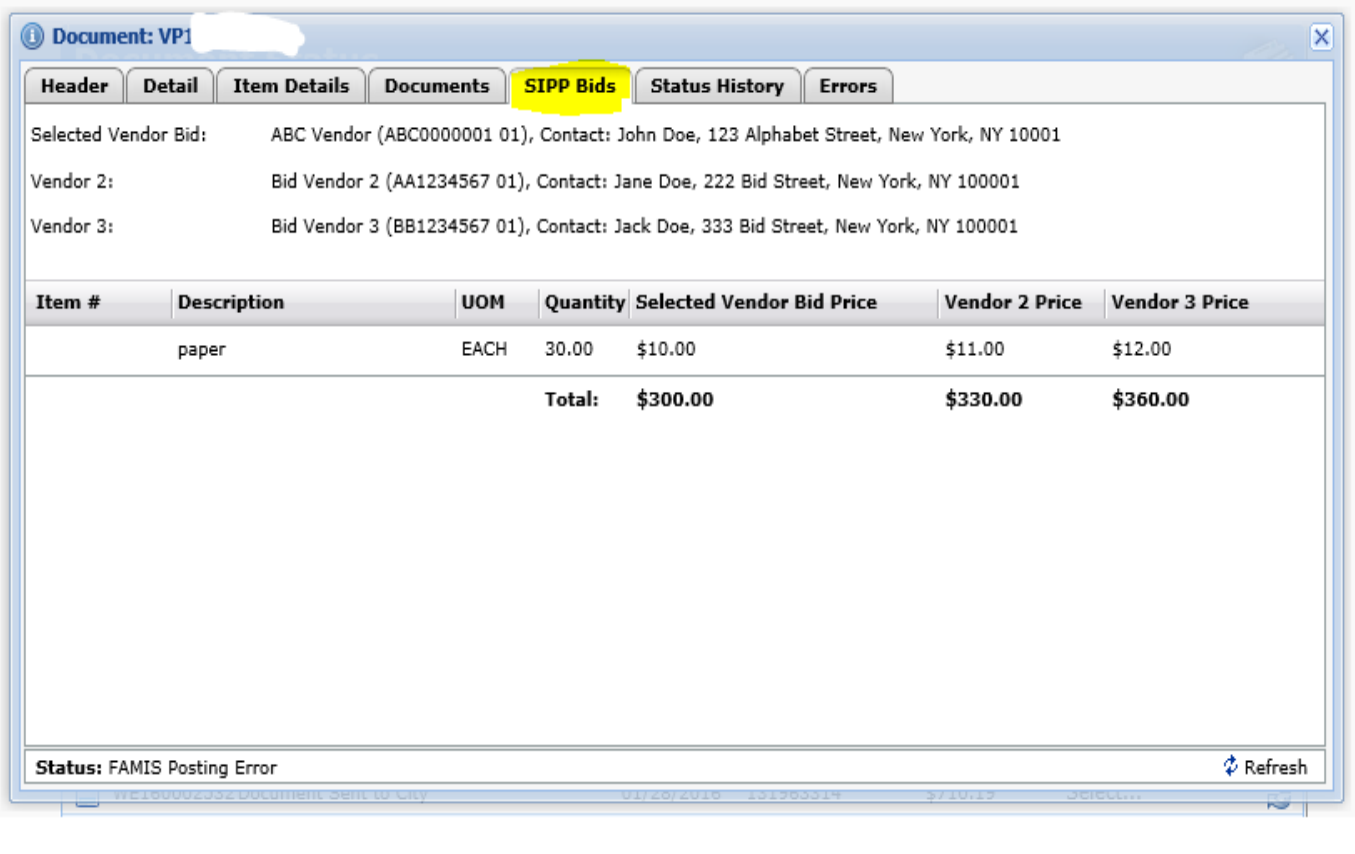
INITIATION

FAMIS will notify the SIPP initiator once the document has been sent for processing (approval).



VIEW UPLOADED SIPP DOCUMENTS

The SIPP approver can view the **uploaded documents** within the ***FAMIS document status*** page



Document: VP1

Header | Detail | Item Details | Documents | SIPP Bids | Status History | Errors

Selected Vendor Bid: ABC Vendor (ABC0000001 01), Contact: John Doe, 123 Alphabet Street, New York, NY 10001

Vendor 2: Bid Vendor 2 (AA1234567 01), Contact: Jane Doe, 222 Bid Street, New York, NY 100001

Vendor 3: Bid Vendor 3 (BB1234567 01), Contact: Jack Doe, 333 Bid Street, New York, NY 100001

Item #	Description	UOM	Quantity	Selected Vendor Bid Price	Vendor 2 Price	Vendor 3 Price
	paper	EACH	30.00	$10.00	$11.00	$12.00
			Total:	**$300.00**	**$330.00**	**$360.00**

Status: FAMIS Posting Error

Refresh

SIPP BIDS SUMMARY

SIPP approvers can view the **SIPP bid** within the ***FAMIS document status*** page

Local Business Meeting & Related Expenditures – Object Code 451 Changes

451F - Food items

451S – Space and facility rentals

451T - Transportation service to and from the meeting as described above, which exceed the normal commute cost to the primary work site.

451A –All other activities(For out-of-pocket reimbursement such as registration fee)

451 SUB OBJECT CODES (NEW)

These new sub-object codes should be used for recording expenditures associated with general business meetings in NYC

(Collapse to 451):

Local Workshop/Conference Expenditures – Object Code 452 Changes

452F - Food items

452S – Space and facility rentals

452T - Transportation service to and from the event as described above, which exceed the normal commute cost to the primary work site.

452A- All other activities (For out-of-pocket reimbursement such as registration fees)

452 SUB OBJECT CODES (NEW)

These new sub-object codes should be used for recording expenditures associated with workshops, conferences and retreats in NYC

(Collapse to 451):

Parent Involvement – Object Code 489 Changes

489F - Food items

489S - Space and facility rentals

489T - Transportation service to and from the event as described above, including any direct payments to parents for reimbursement of expenses

489A- All other activities

489 SUB OBJECT CODES (NEW)

These new sub-object codes should be used for recording expenditures associated with activities involving parent participation in programs

(Collapse to 400):