



**Department of
Education**

Dennis M. Walcott, Chancellor

Charter Schools Accountability & Support
NYSTL Purchasing User Guide
Updated October 9, 2012

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 April. 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:

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[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](#)

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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

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

For password resets call the FAMIS Helpdesk **718-935-5100, option 1** or email 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, call the FAMIS Helpdesk **718-935-5100, option 1** or email 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.

NYC Department of Education
FAMIS

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.

 * 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.

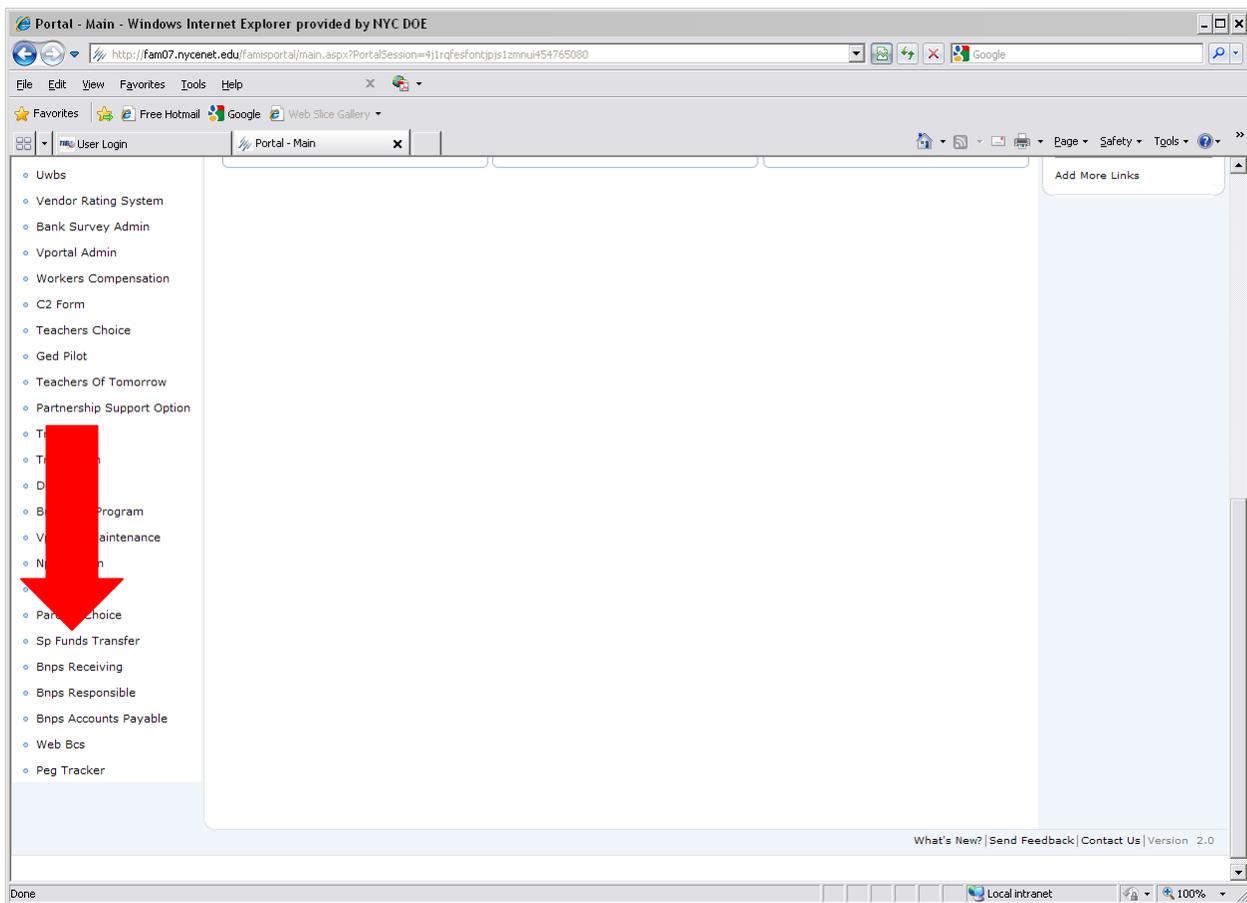
My Documents	Approval	Certification of Delivery
Posted	Awaiting My Approval	Paid But Uncertified
Pending Approval	Pending Work Orders	Payment Pending Certification
Failed	Internal PD Requests	Total Uncertified PO's
Rejected	Pending Library List	
	TRAC	

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

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	\$ 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		<input type="text" value="Please select an Object Code .."/>	
337	002129	U6A1	CTL Charter Schools NYSTL Textbooks and Software	\$ 21,027		<input type="text" value="Please select an Object Code .."/>	
338	002129	U651	CTL Charter Schools NYSTL Library Books	\$ 5,475		<input type="text" value="Please select an Object Code .."/>	
338	002129	XGMO	CTL Charter Schools NYSTL Textbooks and Software	\$ 5,000		<input type="text" value="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.

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) 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

	Fountas & Pinnell Leveled Literacy Intervention: (Blue) Grade 2: Little Book Package(4 Complete Sets of 120 Colored Little Books)	\$2,366.52
Image URL	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
Image URL	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
Image URL	NONFICTION FOUNTAS\PINN LEVELED SET \ GR 6 (P-X) \ 6 COPIES OF 8 TITLES	\$393.80
Image URL	Number: 76753753X Vendor: LEARNING LINKS, INCORPORATED Availability: Check ARRA eligible item.	Form: Paperback U/M: SET NYSTL: Allowed

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://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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NYC Department of Educ... Welcome to NYCBOE Portal L...

Purchasing Setup

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 [Approval](#) |
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 [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)

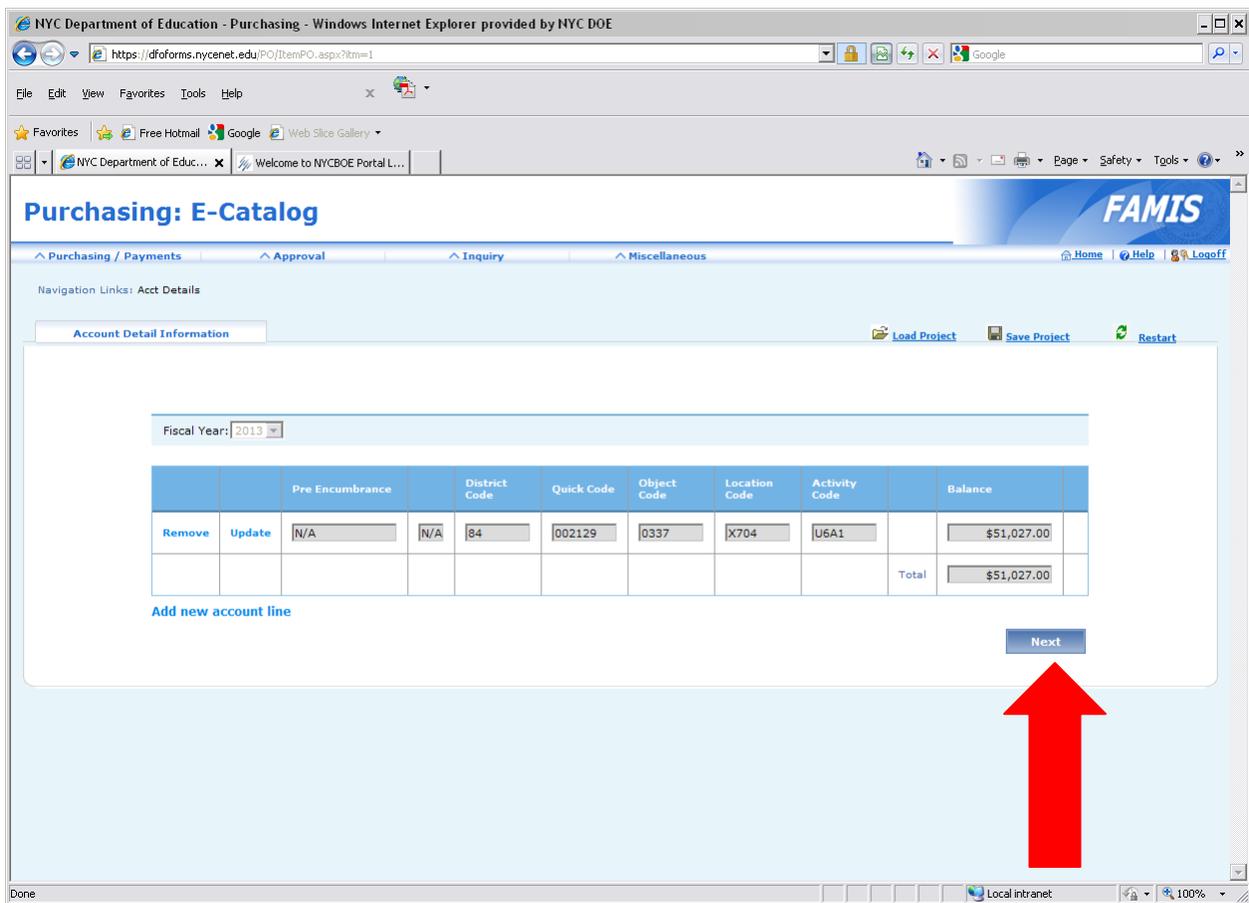
4. Click on contracted services.
5. Click e-catalog.
6. Click Textbooks/Trade books or Computer Software (whichever you plan on purchasing)
(Please see separate section on [purchasing library books.](#))



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

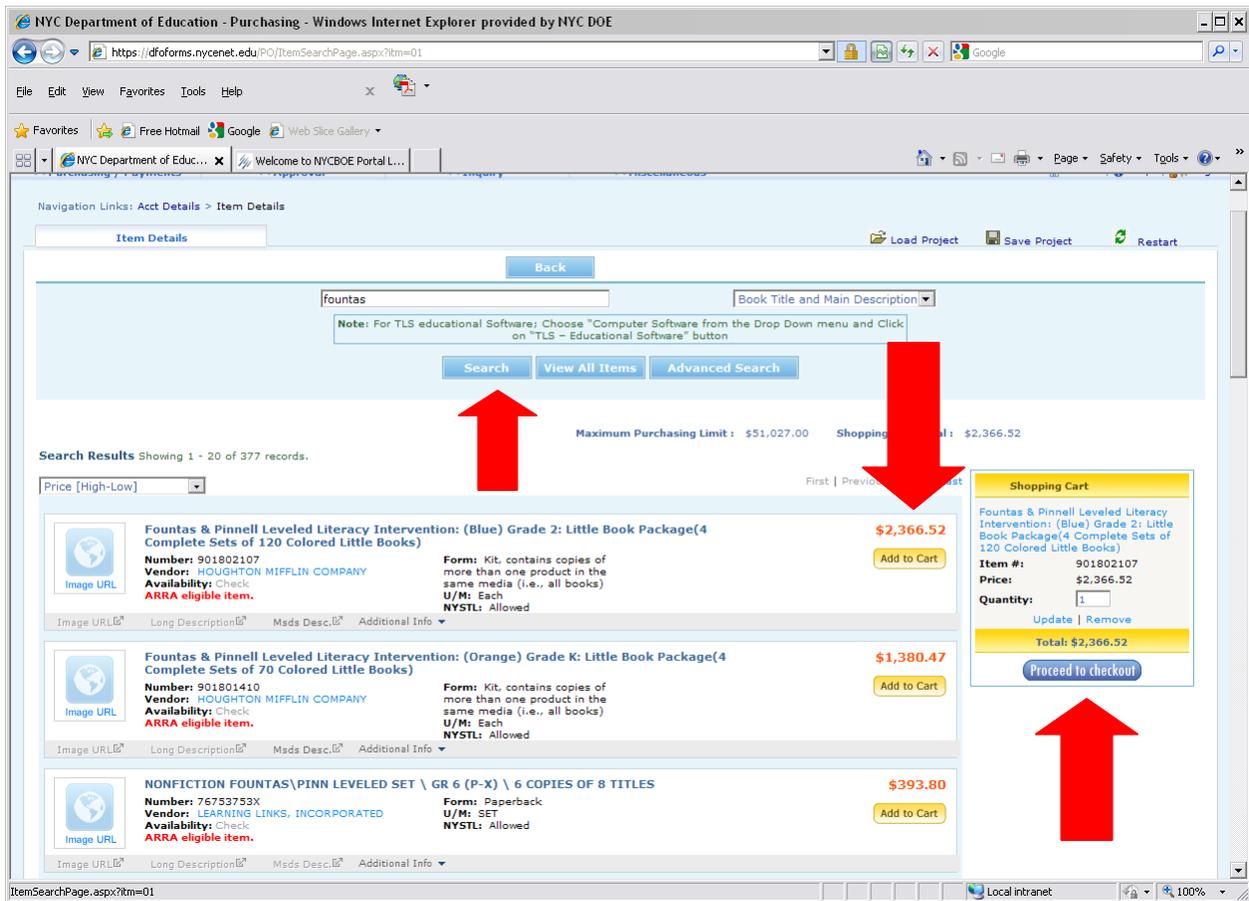
7. District Code should be pre-populated with 84, your location code should also be pre-populated.
8. Quick code: enter 002129
9. Choose the correct object code for what you are purchasing:
 - a) Textbooks- 0337 OR
 - b) Software- 0199
 (See separate section for purchasing [Library Books](#))
10. Activity 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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How to Create a PO for Textbook/ Software (Cont'd)

14. Click next.

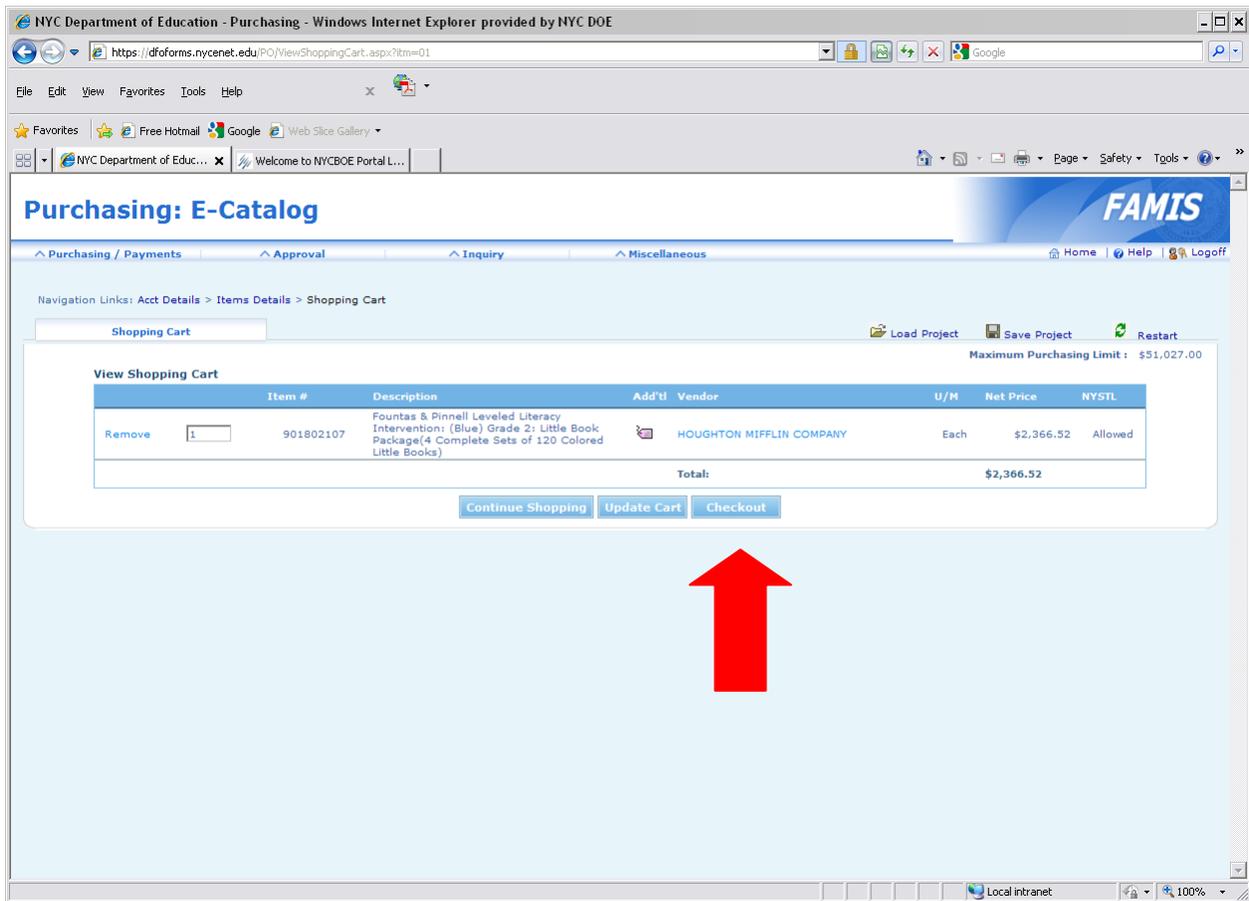


How to Create a PO for Textbook/ Software (Cont'd)

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."

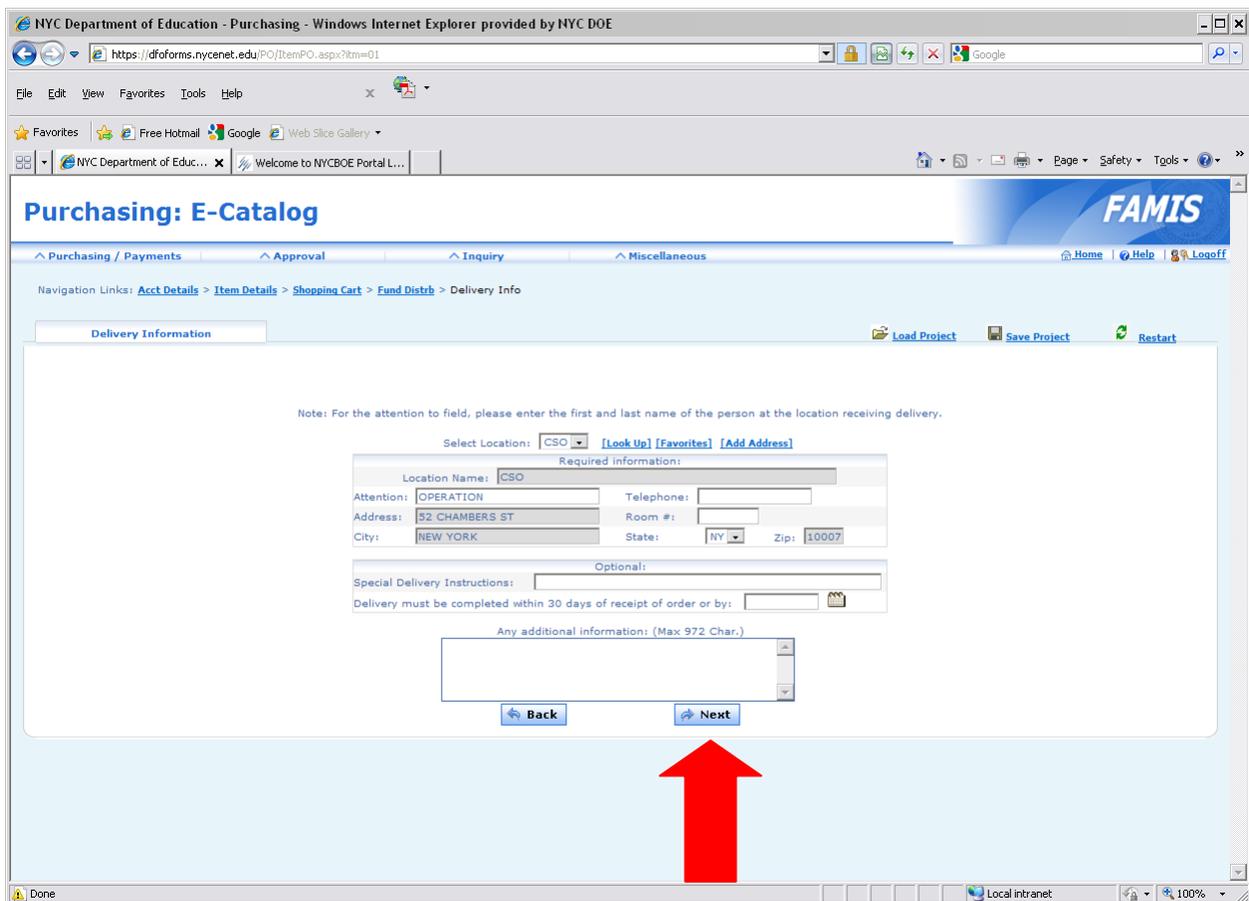
Please note- do not add more to your cart than what is available for the allocation category.

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

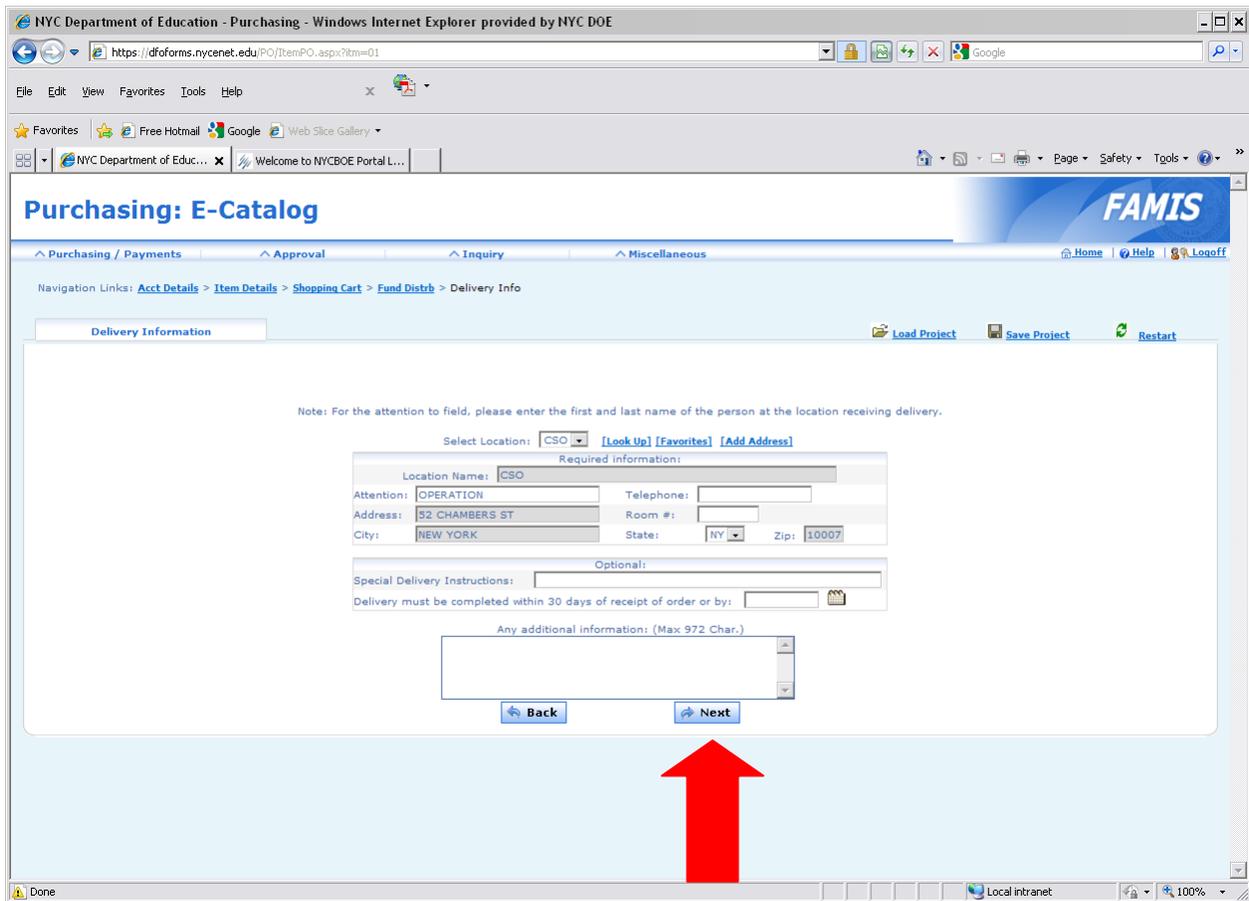
18. Click "Checkout."
19. This creates the PO, where you will enter delivery instructions, etc.



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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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."

NYC Department of Education - Purchasing - Windows Internet Explorer provided by NYC DOE

Navigation Links: [Acct Details](#) > [Item Details](#) > [Shopping Cart](#) > [Fund Distrib](#) > [Delivery Info](#) > [Order Summary](#)

Summary of Purchase Orders

Please confirm the following information prior to posting

Order #	Vendor Name	Vendor #
1	HOUGHTON MIFFLIN COMPANY	
	HOU005000	Contract #: 7000703

Fiscal Year: 2013 Start Date: 10/05/2012 End Date: 10/05/2012

Pre-Enc #	Dst	OkCd	Obj	Locn	Actv	Program Reporting Code	Amount Charged
1.	N/A	84	002129	0337	X704	U6A1	\$ 2,366.52

Item #	Description	Qty	Net Price	Total Amt:	Account Charged
1.	901802107 Fountas & Pinnell Leveled Literacy Intervention: (Blue) Grade 2: Little Book Package(4 Complete Sets of 120 Colored Little Books)	1	\$2,366.52	\$ 2,366.52	84 002129 0337 X704 U6A1

Total Order Amount: \$ 2,366.52

Delivery Information		Invoice Information	
Location:	CSO	Location:	NYC Department of Education
Attention:	OPERATION	Attention:	Office of Payable Operations
Telephone:	(212)374-7623	Telephone:	(718)935-2850
Address:	52 CHAMBERS ST	Address:	65 Court Street, 1502
City/State/Zip:	NEW YORK, NY 10007	City/State/Zip:	Brooklyn, NY 11201
Special Inst:			
Receive By:			

The order(s) will be sent electronically once approved.

[Back](#) [Process Order](#)

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
Phone: 1-800-775-1200 ext. 2296

Follett Library Resources, vendor #: FOL025000; contract #: 7209042
Email: 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
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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NYC Department of Educ... Welcome to NYCBOE Portal L...

Purchasing Setup

^ Purchasing / Payments ^ Approval ^ Inquiry ^ Miscellaneous

Welcome to the Purchasing application.

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

Preview All Commodities



Preview Computer Software

Instructional and administrative computer software.

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

Vendor Information

Vendor Number:

Vendor: **BAKER & TAYLOR INC.**

Attn: ORDER DEPARTMENT Address: 251 MOUNT OLIVE CHURCH ROAD
 City: COMMERCE State: GA Zip: 30599
 Phone: Fax: (800) 775-1100 Toll Free: (800) 775-7480
 Discount Terms: None

Contract #:

Selected Contract Information

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

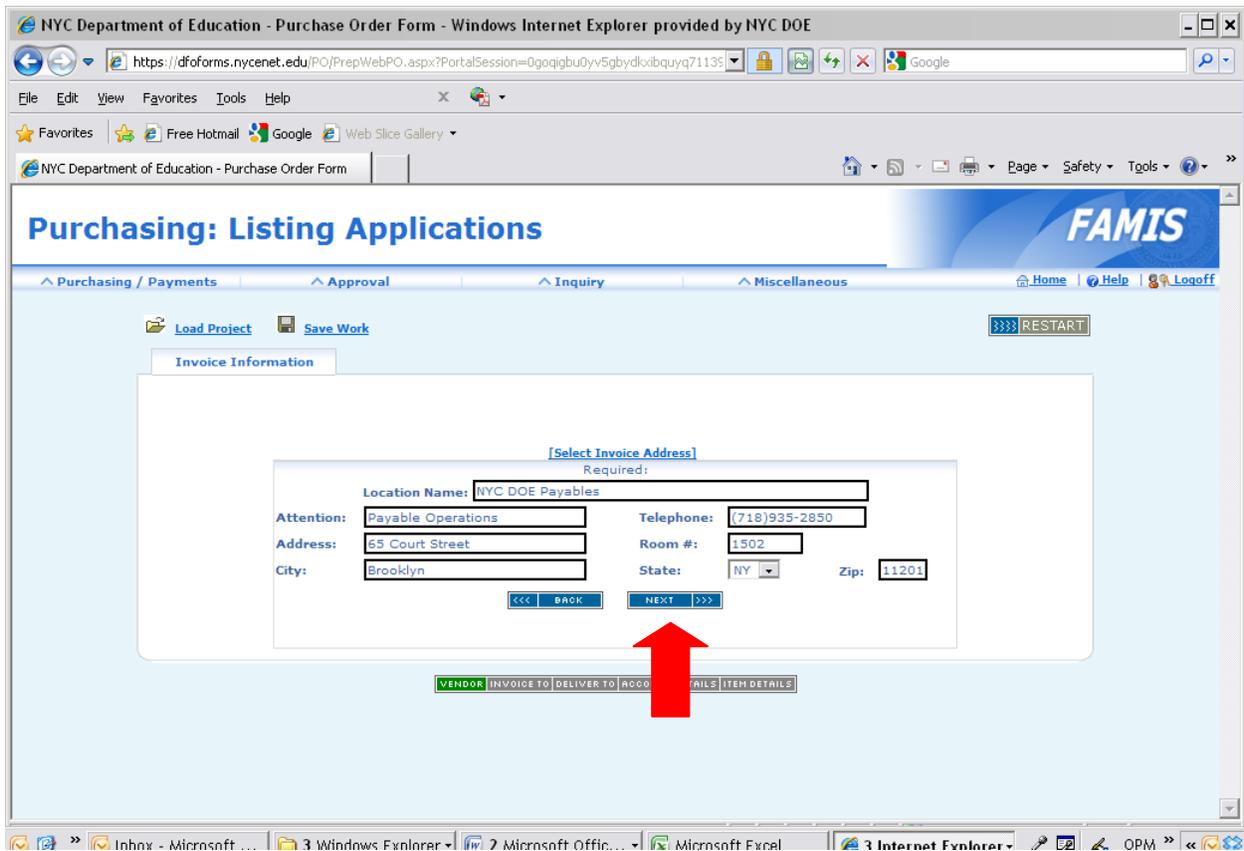
Contract Type: n/a

VENDOR | INVOICE TO DELIVER | ACCOUNT DETAILS | ITEM DETAILS

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

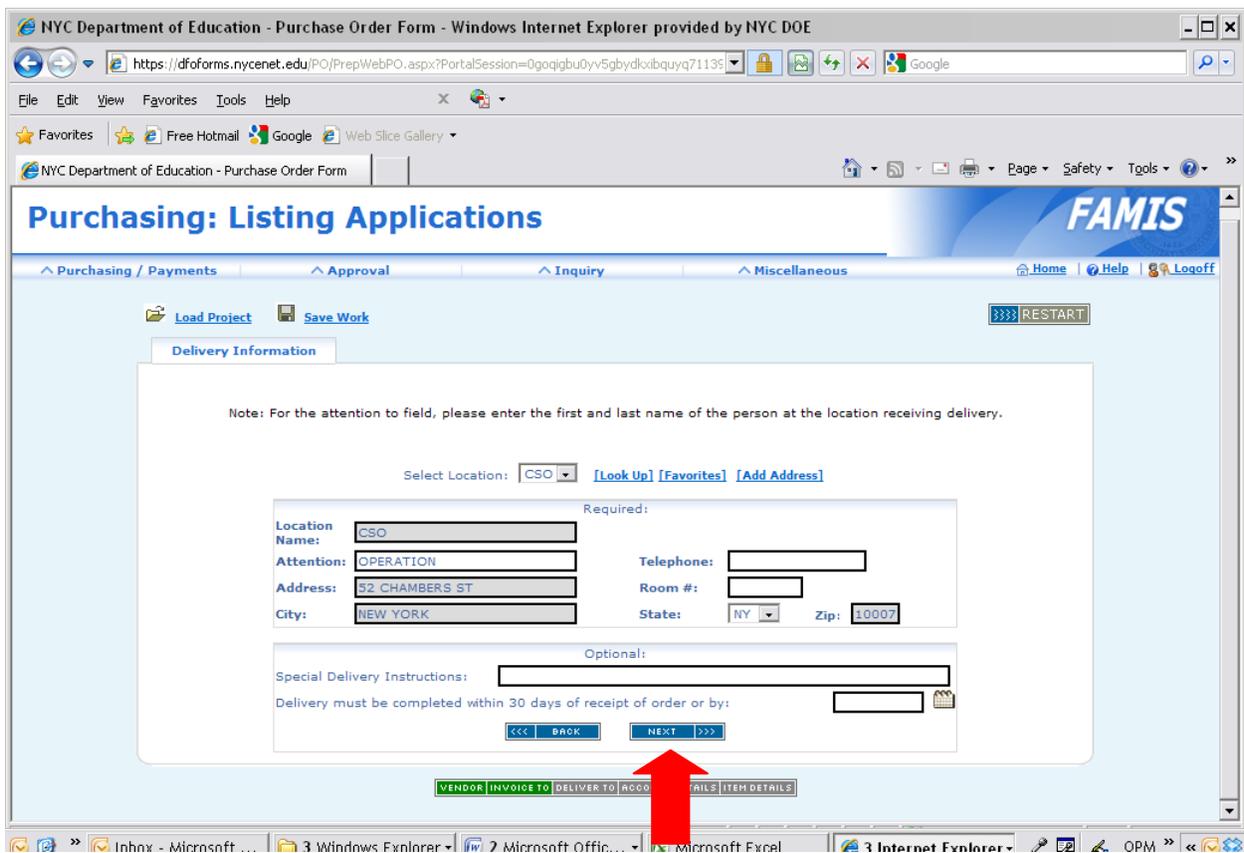
7. Type in the vendor number of the vendor you are working with (listed on page 18- be sure to chose the vendor you are working with).
8. Click "Retrieve Vendor Information." All fields should be pre-populated, except the contract #.
9. Choose the correct contract number (listed on [page 18](#)- be sure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

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

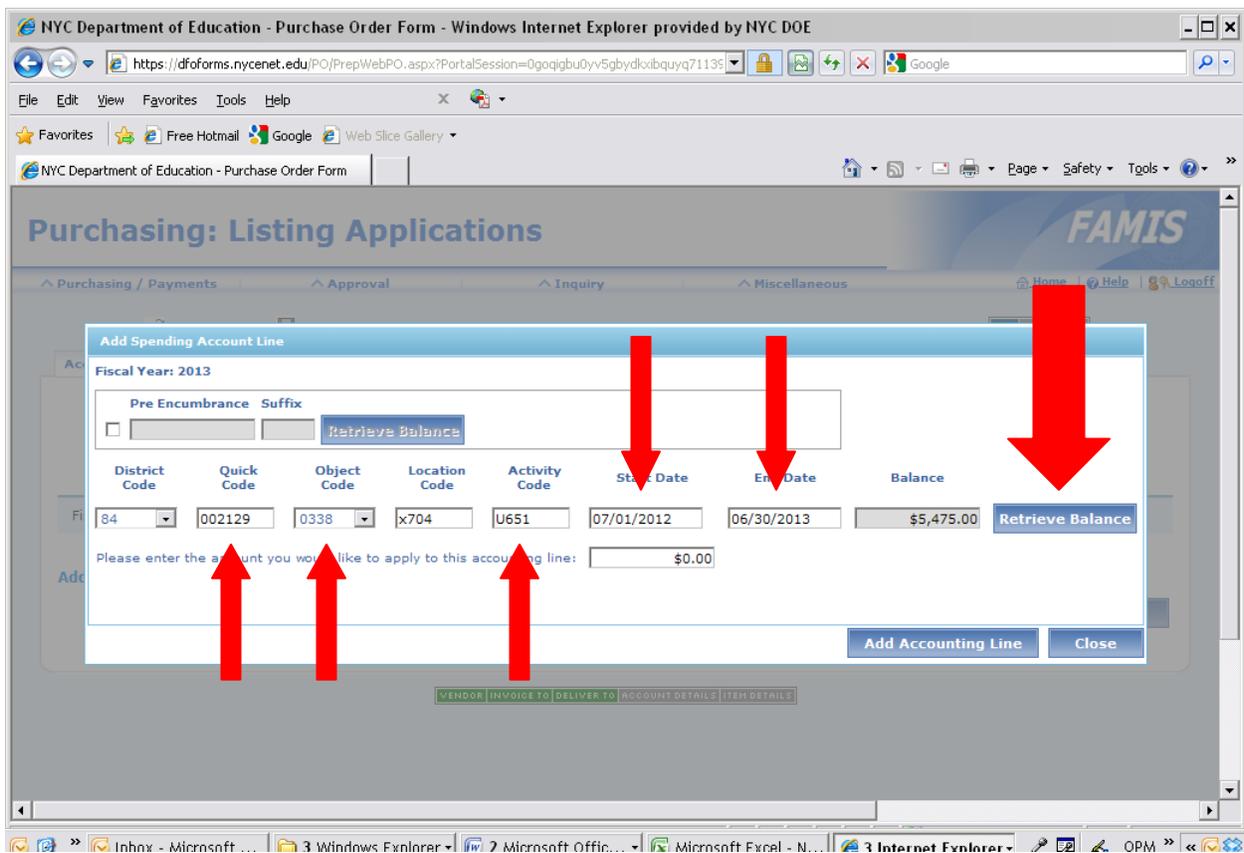
11. Confirm and complete all invoice information: This is where the vendor will seek payment, which is from the DOE. Fill in:
 - Location: NYC Department of Education
 - Attention: Office of Payable Operations
 - Telephone: 718-935-2850
 - Address: 65 Court Street
 - Room: 1502
 - City/State/Zip: Brooklyn,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



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

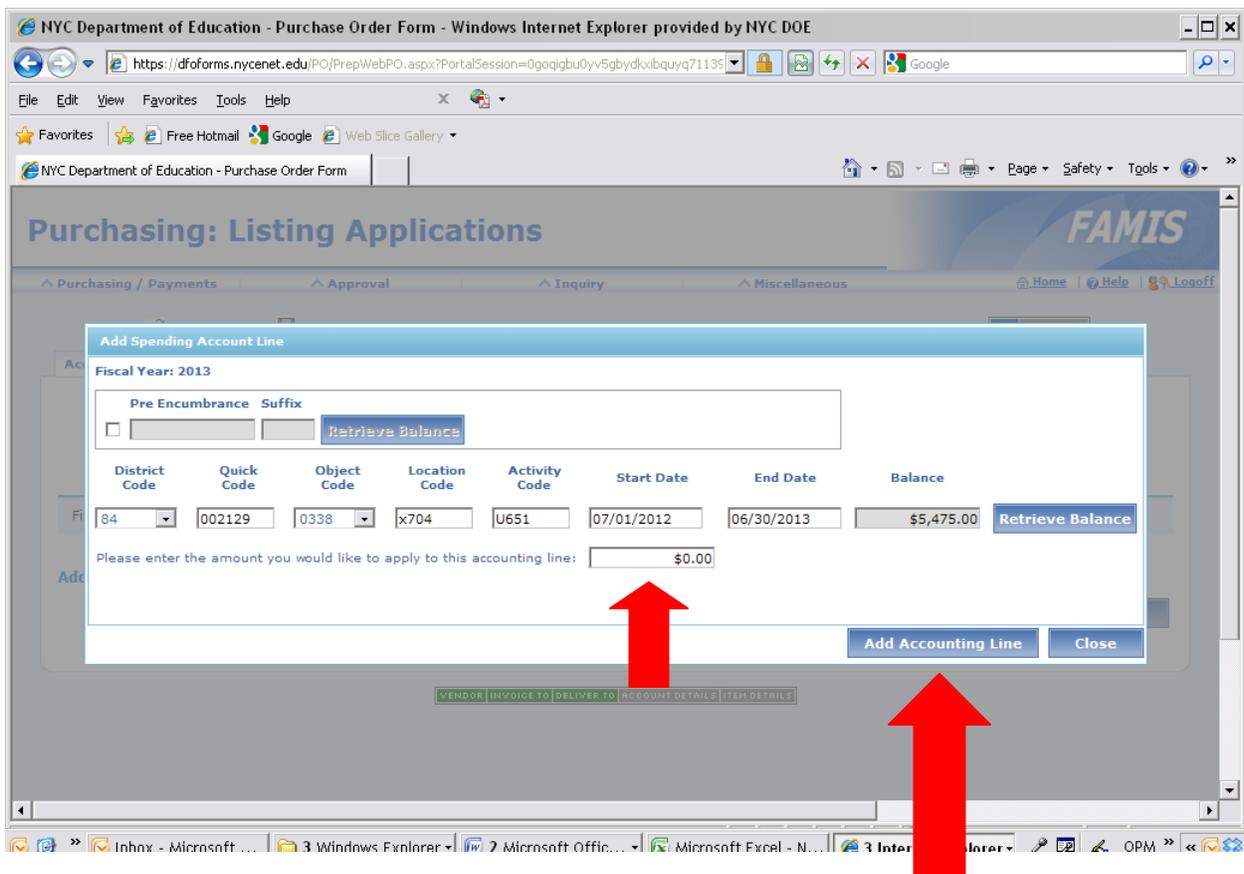
13. Enter in all delivery information. Make sure you fill in all required fields. This is the location where materials will be delivered.
14. Click "Next."

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

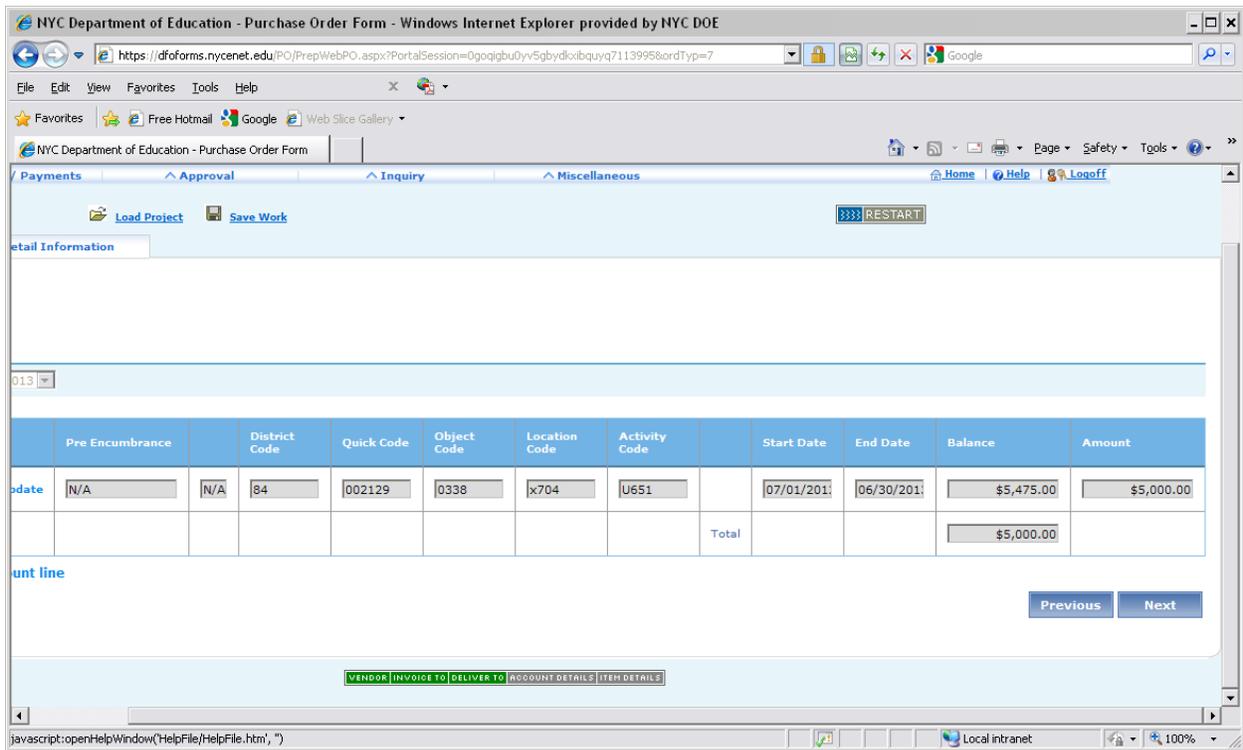
15. District code will be pre-populated
16. Quick code: enter 002129
17. Choose the correct object code for what you are purchasing:
 - **0338**
18. Location code should be pre populated with your borough and school number.
19. Activity code- **enter the 4-digit activity codes for your DBN and the object 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.

Item # Description Unit of Measure Quantity Net Price Item Amount

NA	SEE ATTACHED LIST	EACH	1	\$ 5,000.00	\$ 5,000.00
----	-------------------	------	---	-------------	-------------

The do not exceed amount is: \$5,000.00.

I have a printed list of items.

Recalculate

Total Item Amount
\$ 5,000.00

Any additional information:

<<< BACK ADD LINE NEXT >>>

VENDOR INVOICE TO DELIVER TO ACCOUNT DETAILS

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
 Phone: Address: 251 MOUNT OLIVE CHURCH ROAD
 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

Dst.	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
								Total Accounting Amount	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	
					Total Item Amount	\$ 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

Awaiting My Approval	0
Pending Work Orders	0
Internal PD Requests	0
Pending Library List	0
TRAC	0

Certification of Delivery

Paid But Uncertified	-
Payment Pending Certification	-
Total Uncertified PO's	-



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."

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

5 Approval Mailbox

Approval Mailbox

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

Action: **Approve** Signature: _____ Sign

District/Location: 54 Doc Type: ALL View Level: 200 Go

Download Excel Spreadsheet Documents: _____

Preview	Doc #	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

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

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

[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](#)

[Download Excel Spreadsheet](#)

PreviewDoc #	Init Dist/Loc	Total \$	Item List	Changed	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	IH 03 200 T2394829		09/29/12	7	7
<input type="checkbox"/> IL 122272002	54	2,970.00	IH 03 200 T2394830		09/29/12	7	7
<input type="checkbox"/> IL 122272012	54	3,060.00	IH 03 200 T2394833		09/29/12	7	7
<input type="checkbox"/> IL 122272017	54	1,200.00	IH 03 200 T2394835		09/29/12	7	7
<input type="checkbox"/> IL 122272018	54	4,800.00	IH 03 200 T2394836		09/29/12	7	7

Doc Type: [ALL](#) |
 View Level: [200](#) |
 [Go](#)

Current Signature:
 New Signature:
 Retype Signature:
[Submit](#)

[Next Page >](#)

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.

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

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.

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

Other Links

- FY11 school ordering deadlines
- FAMIS Guide
- FAMIS FAQ's
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- DFO
- Purchasing News
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- Students
- Parents
- Teachers

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

Navigation Menu:

- Purchasing / Payments
- Approval
- Inquiry**
 - Document Inquiry
 - Open Document Inquiry
 - Spending Plan Inquiry
 - Vendor 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.

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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."

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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 |

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 <input type="button" value="Check Fee"/>	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. Ind: Not Received <input type="button" value="Certify Document"/>	Cert. Amount: N/A	

<input type="button" value="View Details"/> <input type="button" value="View Summary"/>	<u>Post Date</u>	<u>Period</u>	<u>T/C</u>	<u>Document No.</u>	<u>Check No.</u>	<u>Bank No.</u>	<u>Due Date</u>	<u>Description</u>	<u>Amount</u>
Original Amt: \$	2,058.70								
Adjustments: \$	-2,058.70								
Liquidations: \$.00								
Balance: \$.00								
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 Receiving Indicator

WR3001252 2013 None \$12,127,861.00 \$7,956,197.94 \$12,127,861.00 Show Received in Full

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

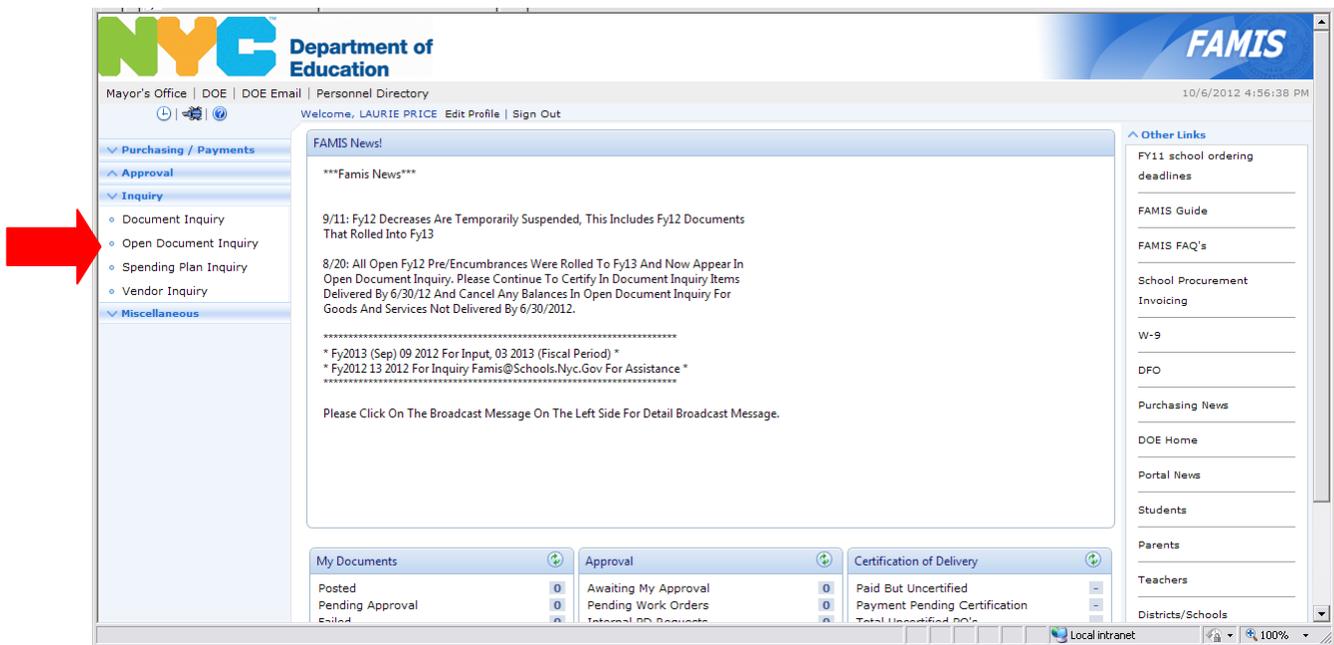
Recalculate

Certifying Your PO After Purchase (Cont'd)

In the drop-down menu under “Receiving Indicator” choose whichever applies (generally Received in Full, but not always).

Enter in the “Received Date” and enter in who received it under “Examined By”. For vendors to be paid, the received date must be prior to the last day of the fiscal year.

Click “Save.” Please make sure that this is done prior to the end of the fiscal year for all purchases.



How to Search for a PO

Click on "Open Document Inquiry."

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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>

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