



# An Overview of the Contract Management System

# Contract Management System Claim Processing – Overview

Home Page

The screenshot shows the Contractor Management System (CMS) Home Page. The browser window is titled "Contractor Details - Windows Internet Explorer" and the address bar shows "https://ocfsws.ocfs.state.ny.us/cms/Contractors/ContractorHome.aspx". The page header includes the New York State logo and the text "Office of Children and Family Services CONTRACT MANAGEMENT SYSTEM (CMS)". The date is "WEDNESDAY, OCTOBER 1 2008".

**Main Menu**

- HOME
- INBOX
- CONTRACTOR
- DETAILS
- LOG SCREEN
- CLAIM
- BUDGET MODIFICATION
- PROGRAM REPORTS
- CONTRACTS
- LIST
- CORRESPONDENCE
- SEARCH

**OCFSCMS**  
Contract Management System

**ANNOUNCEMENTS**  
MAY/JUNE 2008

### What's New in CMS!

#### Introducing Online Claim Processing!

The Division of Administration, Bureau of Contract Management is pleased to announce the expansion of the online claim and program report pilot. This planned expansion is the result of positive feedback from contractors as well as the preliminary evidence that the new functionality does in fact produce the projected efficiencies in payment processes. Note that OCFS pre approval is necessary in order for contractors to access this functionality. For information about the pilot, please contact the CMS Help Desk at the number provided below.

#### We Continue to Grow!

The CMS user community has grown to 3,586, which includes 295 new accounts created since December of 2007. As of March 31, 2008, OCFS has signed a total of 1,231 contracts online.

#### Did You Know?

OCFS relies on CMS as the system of record for maintaining contact information for the organizations and vendors with which it contracts. As such, it is imperative that if your organization undergoes a change in leadership, such as the hiring of a new Executive Director or Chief Financial Officer, you notify your OFCS Program Manager, in writing of such changes, in a timely manner. Also please verify that the email address is correct.

**INBOX**

You have 43 task in your inbox go to your [INBOX](#)

**INSTRUCTIONS**  
Deletion of Authorized Users from CMS

Please be advised that it is the responsibility of each organization to notify Mr. William Gaudette of the NYS Office of Children and Family Services, Bureau of Contract Management, whenever a CMS account needs to be terminated. Organizations are required to terminate the authorization to develop and/or sign contracts whenever an employee leaves the organization. The Contract Developer and Contract Signatory Authorization Form must be submitted to delete as well as to add authorized users. This form can be found by clicking on the link provided below. The form requires an original signature, therefore it cannot be submitted online. Please mail completed authorization forms to Mr. William Gaudette at the address indicated in the instructions.

[Contract Developer and Contract Signatory Authorization Form](#)

[Instructions for Completing the Contract Developer and Contract Signatory Authorization Form](#)

Main Menu  
Inbox  
Correspondence  
Log Screen

User Authorization  
Forms

# Contract Management System Claim Processing – Overview

## Contract List Page

Approved Contract List

Contract Info

Period Info

Action Column

Log Expenditure

Log Budget Modification - Contract List - Windows Internet Explorer

https://ocfs.wv.odfs.state.nv.us/cms/Contractors/ConBudgetContracts.aspx?Functionality=ExperReportLog

NEW YORK STATE

Office of Children and Family Services  
CONTRACT MANAGEMENT SYSTEM (CMS)

USER MANUAL | FAQ | WEDNESDAY, OCTOBER 1 2008

Finch, Scout [CONUSER ]  
LOGOUT

CONTRACT LIST

CONTRACTOR	CONTRACT #	AWARD #	FED ID/MUNI CODE	AMOUNT	CONTRACT TERM	CONTRACT PERIOD	STATUS	ACTION
Atticus/ Finch	FISH554		999999999	\$1,000.00	05/01/2005 - 12/31/2005	05/01/2005 - 12/31/2005	In Process	<a href="#">Log</a>
Atticus/ Finch	DEMO321		999999999	\$1,000.00	03/31/2008 - 03/30/2013	03/31/2008 - 03/30/2009	Approved	<a href="#">Log</a>
Atticus/ Finch	DEMO654		999999999	\$1,000.00	03/01/2008 - 02/28/2011	03/01/2008 - 02/28/2009	Approved	<a href="#">Log</a>
Atticus/ Finch	DEMO123		999999999	\$94,000.00	03/31/2008 - 03/30/2013	03/31/2008 - 03/30/2009	Approved	<a href="#">Log</a>
Atticus/ Finch	DEMO123		999999999	\$94,000.00	03/31/2008 - 03/30/2013	03/31/2009 - 03/30/2010	Approved	<a href="#">Log</a>
Atticus/ Finch	DEMO456		999999999	\$84,723.00	03/31/2008 - 03/30/2013	03/31/2008 - 03/30/2009	Approved	<a href="#">Log</a>
Atticus/ Finch	TEST005		999999999	\$94,000.00	02/14/2006 - 02/14/2009	02/15/2007 - 02/14/2008	Approved	<a href="#">Log</a>
Atticus/ Finch	JAVA002		999999999	\$94,000.00	03/03/2006 - 03/31/2015	03/03/2006 - 03/03/2008	Approved	<a href="#">Log</a>
Atticus/ Finch	AMERIO1	1	999999999	\$1,000.00	07/01/2008 - 12/31/2010	07/01/2008 - 12/31/2009	Approved	<a href="#">Log</a>
Atticus/ Finch	AMERIO2	2	999999999	\$1,000.00	07/01/2008 - 12/31/2010	07/01/2008 - 12/31/2009	Approved	<a href="#">Log</a>
Atticus/ Finch	AMERIO3	3	999999999	\$1,000.00	07/01/2008 - 12/31/2010	07/01/2008 - 12/31/2009	Approved	<a href="#">Log</a>
Atticus/ Finch	AMERIO4	4	999999999	\$1,000.00	07/01/2008 - 12/31/2010	07/01/2008 - 12/31/2009	Approved	<a href="#">Log</a>

1 2 3 4 5 6 7 8

# Contract Management System Claim Processing – Overview

## Expenditure Report Log Page

The screenshot displays the 'Expenditure Report Log' page within a Windows Internet Explorer browser. The page header includes the New York State logo and the text 'Office of Children and Family Services CONTRACT MANAGEMENT SYSTEM (CMS)'. The user is logged in as 'Finch, Scout [CONUSER]' and is on the 'EXPENDITURE REPORT LOG' page. The page contains two main sections: 'CONTRACT DETAILS' and 'CLAIM DETAILS'. The 'CONTRACT DETAILS' section shows Contract #: AMER104, Contractor: Atticus/ Finch, and Contract Period: 7/1/2008 To 12/31/2009. The 'CLAIM DETAILS' section shows Claim Type: Expenditure, Ref Invoice #: AMER104, Date Received: 10/01/2008, Claim Period: 09/01/2008 To 09/30/2008, Amount: \$ 1000.00, and a checkbox for 10% Withhold Release. At the bottom, there are buttons for 'Contract Search', 'Next', 'Save', and 'Clear'.

CONTRACT DETAILS	
Contract #:	AMER104
Contractor:	Atticus/ Finch
Contract Period:	7/1/2008 To 12/31/2009

CLAIM DETAILS	
Claim Type:	Expenditure
Ref Invoice #:	AMER104
Date Received:	10/01/2008
Claim Period:	09/01/2008 To 09/30/2008
Amount:	\$ 1000.00
10% Withhold Release:	<input type="checkbox"/>

- Claim Information
- Contract Information
- Claim Details
- Save Claim

# Contract Management System Claim Processing – Overview

## Expenditure Report Log Page

Claim Successfully Logged  
Contract Task Created  
Process Contract Task

The screenshot shows a web browser window titled "Expenditure Report Log - Windows Internet Explorer". The address bar shows the URL: <https://ocfsws.ocfs.state.ny.us/cms/ExpenReportLog.aspx?id=494775&ExpenID=1688823>. The page header includes the New York State logo and the text "NEW YORK STATE", "Office of Children and Family Services", and "CONTRACT MANAGEMENT SYSTEM (CMS)". The date "Wednesday, October 1, 2008" is displayed in the top right corner. The main content area is titled "EXPENDITURE REPORT LOG" and features a red message: "Claim successfully logged".

On the left side, there is a navigation menu with the following items: HOME, INBOX, CONTRACTOR, Details, LOG SCREEN, Claim, Budget Modification, Program Reports, CONTRACTS, List, CORRESPONDENCE, and Search. The user is identified as "Finch, Scout [CONUSER]" with a "Logout" link.

The main content area displays the following details:

CONTRACT DETAILS	
Contract #:	AMER104
Contractor:	Atticus/ Finch
Contract Period:	7/1/2008 To 12/31/2009

CLAIM DETAILS	
Claim Type:	Expenditure
ReInvoice #:	AMER104
Date Received:	10/1/2008
Claim Period:	9/1/2008 To 9/30/2008
Amount: \$	1000
10% Withhold Release:	<input type="checkbox"/>

At the bottom of the form, there are buttons for "Contract Search", "Next", "Save", and "Clear".

# Contract Management System Claim Processing – Overview

## Expenditure Report Page

- Adding Claim Information
- Claim Schedule
- Expenditure Details
- Expenditure Amount

CONTRACT MANAGEMENT SYSTEM (CMS) User Manual | FAQ | Wednesday, October 1, 2008

EXPENDITURE REPORT

Finch, Scout [CONUSER] [Logout](#)

[HOME](#)  
[INBOX](#)  
[CONTRACTOR](#)  
[Details](#)  
[LOG SCREEN](#)  
[Claim](#)  
[Budget Modification](#)  
[Program Reports](#)  
[CONTRACTS](#)  
[List](#)  
[CORRESPONDENCE](#)  
[Search](#)

**CONTRACT DETAILS** ✔

Contract #: AMER104 Date Received: 10/1/2008  
 Contractor: Atticus/ Finch  
 Contract Period: 7/1/2008 To 12/31/2009 Contract Amount: \$1,000.00

**EXPENDITURE DETAILS**

Expenditure Report Period: 09/01/2008 To 09/30/2008  
 RefInvoice #: AMER104 Final Expenditure Report:   
 Expenditure status: Pending Waive Withhold:

**SCHEDULE INFORMATION** **EXPENDITURE EDITS**

BUDGET CATEGORY	BUDGET AMT	PREV APPROVED EXPEN AMT	EXPEN AMT	MANUAL ADJUSTMENT <small>*CLICK BUTTON TO ENTER DISALLOWANCE REASON</small>	SYSTEM DISALLOWANCE	ADJUSTED EXPEN	TOTAL EXPEN TO DATE	BAL
Program Operating Costs								
Personnel Expenses	\$300.00	\$0.00	0.00	0.00		\$0.00	\$0.00	\$300.00
Fringe Benefits	\$200.00	\$0.00	0.00	0.00		\$0.00	\$0.00	\$200.00
Staff Travel	\$0.00	\$0.00	0.00	0.00		\$0.00	\$0.00	\$0.00
Member Travel	\$0.00	\$0.00	0.00	0.00		\$0.00	\$0.00	\$0.00
Equipment	\$100.00	\$0.00	0.00	0.00		\$0.00	\$0.00	\$100.00

# Contract Management System Claim Processing – Overview

## Expenditure Report Page

Editing Claim Information  
Run Edit  
Making Changes as Necessary

Two Year Half Time (2nd Year)	\$0.00	\$0.00	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	\$0.00	\$0.00	\$0.00	\$0.00
Two Year Half Time (1st Year)	\$0.00	\$0.00	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	\$0.00	\$0.00	\$0.00	\$0.00
<b>Subtotal</b>	\$0.00	\$0.00	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	\$0.00	\$0.00	\$0.00	\$0.00
<b>Member Support Costs</b>								
FICA for Members	\$200.00	\$0.00	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	\$0.00	\$0.00	\$0.00	\$200.00
Workers Compensation	\$0.00	\$0.00	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	\$0.00	\$0.00	\$0.00	\$0.00
Health Care	\$0.00	\$0.00	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	\$0.00	\$0.00	\$0.00	\$0.00
Other Member Support Costs	\$0.00	\$0.00	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	\$0.00	\$0.00	\$0.00	\$0.00
<b>Subtotal</b>	\$200.00	\$0.00	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	\$0.00	\$0.00	\$0.00	\$200.00
<b>Administrative Costs</b>								
Administrative Expenses	\$0.00	\$0.00	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	\$0.00	\$0.00	\$0.00	\$0.00
<b>Subtotal</b>	\$0.00	\$0.00	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total</b>	\$1,000.00	\$0.00	<input type="text" value="1000"/>	<input type="text" value="0.00"/>	\$500.00	\$500.00	\$500.00	\$500.00

Matching:  Cumulative matching to date: 0.0

**Warning: Cumulative Matching expenditures less than Matching Percentage X Expenditures to Date!**

[Claim History](#)   [Claim Details](#)   [Correspondence](#)  
[Upload Claim Documents](#)   [Log Program Report](#)   [Program Reports](#)

# Contract Management System Claim Processing – Overview

## Expenditure Report Page

Create Match - Windows Internet Explorer  
 https://ocfsws.ocfs.state.ny.us/cms/ExpenReportReviewer.aspx?id=1688823

NEW YORK STATE  
 Office of Children and Family Services  
 CONTRACT MANAGEMENT SYSTEM (CMS) User Manual | FAQ | Wednesday, October 1, 2008

Finch, Scout [CONUSER] Logout Process operation successful!

EXPENDITURE REPORT

HOME  
 INBOX  
 CONTRACTOR  
 Details  
 LOG SCREEN  
 Claim  
 Budget Modification  
 Program Reports  
 CONTRACTS  
 List  
 CORRESPONDENCE  
 Search

CONTRACT DETAILS

Contract #: AMER104 Date Received: 10/1/2008  
 Contractor: Abicus/ Finch  
 Contract Period: 7/1/2008 To 12/31/2009 Contract Amount: \$1,000.00

EXPENDITURE DETAILS

Expenditure Report Period: 09/01/2008 To 09/30/2008  
 RefInvoice #: AMER104 Final Expenditure Report:   
 Expenditure status: In Process Waive Withhold:

Subtotal	\$0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$1,000.00	\$0.00	1000	0.00	\$500.00	\$500.00	\$500.00	\$500.00

Matching: 0 Cumulative matching to date: 0.0

**Warning: Cumulative Matching expenditures less than Matching Percentage X Expenditures to Date!**

CERTIFICATION:  
 I certify that the above information is just, true and correct; that the expenses for the period have been incurred and paid for and have not been previously claimed; and that such expenditures are proper and necessary for the program.

Accept  Decline

[Claim History](#) [Claim Details](#) [Correspondence](#)  
[Upload Claim Documents](#) [Log Program Report](#) [Program Reports](#)

Processing a Claim  
 Process Successful  
 Claim Signature Area Added

# Contract Management System Claim Processing – Overview

## Expenditure Report Page

Office of Children and Family Services  
CONTRACT MANAGEMENT SYSTEM (CMS) User Manual | FAQ | Wednesday, October 1, 2008

Finch, Scout [CONUSER] Logout EXPENDITURE REPORT Process operation successful!

**HOME**  
**INBOX**  
**CONTRACTOR**  
**Details**  
**LOG SCREEN**  
**Claim**  
**Budget Modification**  
**Program Reports**  
**CONTRACTS**  
**List**  
**CORRESPONDENCE**  
**Search**

**CONTRACT DETAILS**

Contract #: AMERJ04 Date Received: 10/1/2008  
 Contractor: Aticus/ Finch  
 Contract Period: 7/1/2008 To 12/31/2009 Contract Amount: \$1,000.00

**EXPENDITURE DETAILS**

Expenditure Report Period: 09/01/2008 To 09/30/2008  
 RefInvoice #: AMERJ04 Final Expenditure Report:   
 Expenditure status: In Process Waive Withhold:

**SCHEDULE INFORMATION** **EXPENDITURE EDITS**

REVIEW STAGE	ROLE	START DATE	END DATE	SCHEDULED DAYS	ACTUAL DAYS	PROCESSED BY
With Contractor	CONUSER	10/1/2008	10/1/2008	0	0	Scout Finch
Package to Contractor for Signature	CLAIMSIG	10/1/2008		0	0	
BCM1	CMSADMIN			0		
PaymentCalc	CMSADMIN			0		
PaymentCoding	CMSADMIN			0		

BUDGET CATEGORY	BUDGET AMT	PREV APPROVED	EXPEN AMT	MANUAL ADJUSTMENT	SYSTEM DISALLOWANCE	ADJUSTED EXPEN	TOTAL EXPEN	BAL

Processing a Claim  
Reviewing the Schedule

# Contract Management System Claim Processing – Overview

## Expenditure Report Page

NEW YORK STATE  
Office of Children and Family Services  
CONTRACT MANAGEMENT SYSTEM (CMS)

CMS INBOX

Radley, Boo [CLAIMSIG]  
LOGOUT

TASK	CONTRACT	PROGRAM NAME	REVIEW STAGE	REVIEWER	LOG STATUS	STAGE DAYS REMAINING
<a href="#">CTRCT</a>	<a href="#">4262007</a>	Misc	With Contractor	Gaudette, Bill [CONUSER]	Pending	0
<a href="#">RENEW</a>	<a href="#">ALYCE01</a>	Misc	With Contractor	Finch, Scout [CONUSER]	Pending	0
<a href="#">ADVANCE</a>	<a href="#">ALYCE02</a>	Misc	With Contractor	Radley, Boo [CLAIMSIG]	Pending	0
<a href="#">EXPEN</a>	<a href="#">AMER004</a>	AmeriCorps	Package to Contractor for Signature	Radley, Boo [CLAIMSIG]	Pending	0
<a href="#">CTRCT</a>	<a href="#">BILL238</a>	Training - Department	With Contractor	Finch, Scout [CONUSER]	Pending	0
<a href="#">CTRCT</a>	<a href="#">BILL237</a>	Training - Department	With Contractor	Finch, Scout [CONUSER]	Pending	0
<a href="#">CTRCT</a>	<a href="#">BILL238</a>	Training - Department	With Contractor	Finch, Scout [CONUSER]	Pending	0
<a href="#">CTRCT</a>	<a href="#">BILL239</a>	Training - Department	With Contractor	Finch, Scout [CONUSER]	Pending	0
<a href="#">ADVANCE</a>	<a href="#">BLUE001</a>	Advantage After School	With Contractor	Radley, Boo [CLAIMSIG]	Pending	0

Signing a Claim

Logging on as ClaimSig

Locating the Contract Task

# Contract Management System Claim Processing – Overview

## Expenditure Report Page

NEW YORK STATE  
Office of Children and Family Services  
CONTRACT MANAGEMENT SYSTEM (CMS)

USER MANUAL | FAQ | WEDNESDAY, OCTOBER 1 2008

Radley, Boo [CLAIMSIG]  
LOGOUT

CMS INBOX

TASK	CONTRACT	PROGRAM NAME	REVIEW STAGE	REVIEWER	LOG STATUS	STAGE DAYS REMAINING
<a href="#">CTRCT</a>	<a href="#">4262007</a>	Misc	With Contractor	Gaudette, Bill [CONUSER]	Pending	0
<a href="#">RENEW</a>	<a href="#">ALYCE01</a>	Misc	With Contractor	Finch, Scout [CONUSER]	Pending	0
<a href="#">ADVANCE</a>	<a href="#">ALYCE02</a>	Misc	With Contractor	Radley, Boo [CLAIMSIG]	Pending	0
<a href="#">EXPEH</a>	<a href="#">AMERID4</a>	AmeriCorps	Package to Contractor for Signature	Radley, Boo [CLAIMSIG]	Pending	0
<a href="#">CTRCT</a>	<a href="#">BILL236</a>	Training - Department	With Contractor	Finch, Scout [CONUSER]	Pending	0
<a href="#">CTRCT</a>	<a href="#">BILL237</a>	Training - Department	With Contractor	Finch, Scout [CONUSER]	Pending	0
<a href="#">CTRCT</a>	<a href="#">BILL238</a>	Training - Department	With Contractor	Finch, Scout [CONUSER]	Pending	0
<a href="#">CTRCT</a>	<a href="#">BILL239</a>	Training - Department	With Contractor	Finch, Scout [CONUSER]	Pending	0
<a href="#">ADVANCE</a>	<a href="#">BLUE001</a>	Advantage After School	With Contractor	Radley, Boo [CLAIMSIG]	Pending	0

Signing a Claim

Logging on as ClaimSig

Locating the Contract Task

# Contract Management System Claim Processing – Overview

## Expenditure Report Page

Subtotal	\$200.00	\$0.00	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	\$0.00	\$0.00	\$0.00	\$200.00
Administrative Costs								
Administrative Expenses	\$0.00	\$0.00	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	\$0.00	\$0.00	\$0.00	\$0.00
Subtotal	\$0.00	\$0.00	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$1,000.00	\$0.00	<input type="text" value="1000"/>	<input type="text" value="0.00"/>	\$500.00	\$500.00	\$500.00	\$500.00

Matching:  Cumulative matching to date: 0.0

**Warning: Cumulative Matching expenditures less than Matching Percentage X Expenditures to Date!**

[Claim History](#)   [Claim Details](#)   [Correspondence](#)

[Upload Claim Documents](#)   [Log Program Report](#)   [Program Reports](#)

Signing a Claim  
Review Information  
Run Edit

# Contract Management System Claim Processing – Overview

## Expenditure Report Page

Subtotal	\$200.00	\$0.00	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	\$0.00	\$0.00	\$0.00	\$200.00
Administrative Costs								
Administrative Expenses	\$0.00	\$0.00	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	\$0.00	\$0.00	\$0.00	\$0.00
Subtotal	\$0.00	\$0.00	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$1,000.00	\$0.00	<input type="text" value="1000"/>	<input type="text" value="0.00"/>	\$500.00	\$500.00	\$500.00	\$500.00

Matching:  Cumulative matching to date: 0.0

**Warning: Cumulative Matching expenditures less than Matching Percentage X Expenditures to Date!**

[Claim History](#)   [Claim Details](#)   [Correspondence](#)  
[Upload Claim Documents](#)   [Log Program Report](#)   [Program Reports](#)

Signing a Claim  
Review Information  
Run Edit

# Contract Management System Claim Processing – Overview

## Expenditure Report Page

Matching:  Cumulative matching to date: 0.0

**Warning: Cumulative Matching expenditures less than Matching Percentage X Expenditures to Date!**

**CERTIFICATION:**  
I certify that the above information is just, true and correct; that the expenses for the period have been incurred and paid for and have not been previously claimed; and that such expenditures are proper and necessary for the program.

Accept  Decline

[Claim History](#) [Claim Details](#) [Correspondence](#)

[Upload Claim Documents](#) [Log Program Report](#) [Program Reports](#)

Sign the Claim

Accept the Claim

Process Signed Claim

# Contract Management System Claim Processing – Overview

## Expenditure Report Page

NEW YORK STATE

Office of Children and Family Services  
CONTRACT MANAGEMENT SYSTEM (CMS)

User Manual | FAQ | Wednesday, October 1, 2008

Radley, Boo [CLAIMSIG ]  
Logout

EXPENDITURE REPORT

Process operation successful!

HOME

INBOX

CONTRACTOR  
Details

LOG SCREEN

Claim  
Budget Modification  
Program Reports

CONTRACTS  
List

CORRESPONDENCE

CONTRACT DETAILS

Contract #:	AMER104	Date Received:	10/1/2008
Contractor:	Atticus/ Finch		
Contract Period:	7/1/2008 To 12/31/2009	Contract Amount:	\$1,000.00

EXPENDITURE DETAILS

Expenditure Report Period:	09/01/2008	To	09/30/2008
ReInvoice #:	AMER104	Final Expenditure Report:	<input type="checkbox"/>
Expenditure status:	In Process	Waive Withhold:	<input type="checkbox"/>

Claim Processed  
Claim Schedule

# Contract Management System Claim Processing – Overview

## Expenditure Report Page

NEW YORK STATE  
Office of Children and Family Services  
CONTRACT MANAGEMENT SYSTEM (CMS)

Radley, Boo [CLAIMSIG]  
Logout

EXPENDITURE REPORT Process operation successful!

**CONTRACT DETAILS**

Contract #: AMERIO4 Date Received: 10/1/2008  
 Contractor: Atticus! Finch  
 Contract Period: 7/1/2008 To 12/31/2009 Contract Amount: \$1,000.00

**EXPENDITURE DETAILS**

Expenditure Report Period: 09/01/2008 To 09/30/2008  
 RefInvoice #: AMERIO4 Final Expenditure Report:   
 Expenditure status: In Process Waive Withhold:

[SCHEDULE INFORMATION](#) [EXPENDITURE EDITS](#)

REVIEW STAGE	ROLE	START DATE	END DATE	SCHEDULED DAYS	ACTUAL DAYS	PROCESSED BY
With Contractor	CONUSER	10/1/2008	10/1/2008	0	0	Scout Finch
Package to Contractor for Signature	CLAIMSIG	10/1/2008	10/1/2008	0	0	Boo Radley
BCM1	CMSADMIN	10/1/2008		0	0	
PaymentCalc	CMSADMIN			0		
PaymentCoding	CMSADMIN			0		

Claim Processed  
Claim Schedule

# Contract Management System Program Report Processing – Overview

## Home Page

The screenshot shows the OCFS CMS Home Page in Internet Explorer. The browser title is "Contractor Details - Windows Internet Explorer" and the address bar shows "https://ocfsws.ocfs.state.ny.us/cms/Contractors/ContractorHome.aspx". The page header includes the New York State logo, "Office of Children and Family Services", "CONTRACT MANAGEMENT SYSTEM (CMS)", and a navigation menu with "USER MANUAL | FAQ | WEDNESDAY, OCTOBER 1 2008".

**Main Menu**

- Inbox
- Correspondence
- Log Screen

**Contractor Details - Windows Internet Explorer**

https://ocfsws.ocfs.state.ny.us/cms/Contractors/ContractorHome.aspx

File Edit View Favorites Tools Help

Contractor Details

**NEW YORK STATE**

Office of Children and Family Services  
CONTRACT MANAGEMENT SYSTEM (CMS)

USER MANUAL | FAQ | WEDNESDAY, OCTOBER 1 2008

Finch, Scout [CONUSER]  
LOGOUT

HOME  
INBOX  
CONTRACTOR  
DETAILS  
LOG SCREEN  
CLAIM  
BUDGET MODIFICATION  
PROGRAM REPORTS  
CONTRACTS  
LIST  
CORRESPONDENCE  
SEARCH

**OCFSCMS**  
Contract Management System

**Welcome to the  
Contract Management System**

**ANNOUNCEMENTS**  
MAY/JUNE 2008

**What's New in CMS!**

**Introducing Online Claim Processing!**  
The Division of Administration, Bureau of Contract Management is pleased to announce the expansion of the online claim and program report pilot. This planned expansion is the result of positive feedback from contractors as well as the preliminary evidence that the new functionality does in fact produce the projected efficiencies in payment processes. Note that OCFS pre approval is necessary in order for contractors to access this functionality. For information about the pilot, please contact the CMS Help Desk at the number provided below.

**We Continue to Grow!**  
The CMS user community has grown to 3,586, which includes 295 new accounts created since December of 2007. As of March 31, 2008, OCFS has signed a total of 1,231 contracts online.

**Did You Know?**  
OCFS relies on CMS as the system of record for maintaining contact information for the organizations and vendors with which it contracts. As such, it is imperative that if your organization undergoes a change in leadership, such as the hiring of a new Executive Director or Chief Financial Officer, you notify your OFCS Program Manager, in writing of such changes, in a timely manner. Also please verify that the email address is correct.

**INBOX**

You have 43 task in your inbox  
go to your [INBOX](#)

**INSTRUCTIONS**  
Deletion of Authorized Users from CMS

Please be advised that it is the responsibility of each organization to notify Mr. William Gaudette of the NYS Office of Children and Family Services, Bureau of Contract Management, whenever a CMS account needs to be terminated. Organizations are required to terminate the authorization to develop and/or sign contracts whenever an employee leaves the organization. The Contract Developer and Contract Signatory Authorization Form must be submitted to delete as well as to add authorized users. This form can be found by clicking on the link provided below. The form requires an original signature, therefore it cannot be submitted online. Please mail completed authorization forms to Mr. William Gaudette at the address indicated in the instructions.

[Contract Developer and Contract Signatory Authorization Form](#)

[Instructions for Completing the Contract Developer and Contract Signatory Authorization Form](#)

Local intranet 100%

# Contract Management System Program Report Processing – Overview

## Contract List Page

NEW YORK STATE  
Office of Children and Family Services  
CONTRACT MANAGEMENT SYSTEM (CMS)

Finch, Scout [CONUSER]  
LOGOUT

CONTRACT LIST

CONTRACTOR	CONTRACT #	AWARD #	FED ID/MUNI CODE	AMOUNT	CONTRACT TERM	CONTRACT PERIOD	STATUS	ACTION
Aticus/ Finch	FISH554		999999999	\$1,000.00	05/01/2005 - 12/31/2005	05/01/2005 - 12/31/2005	In Process	<a href="#">Log</a>
Aticus/ Finch	DEMO321		999999999	\$1,000.00	03/31/2008 - 03/30/2013	03/31/2008 - 03/30/2009	Approved	<a href="#">Log</a>
Aticus/ Finch	DEMO654		999999999	\$1,000.00	03/01/2008 - 02/28/2011	03/01/2008 - 02/28/2009	Approved	<a href="#">Log</a>
Aticus/ Finch	DEMO123		999999999	\$94,000.00	03/31/2008 - 03/30/2013	03/31/2008 - 03/30/2009	Approved	<a href="#">Log</a>
Aticus/ Finch	DEMO123		999999999	\$94,000.00	03/31/2008 - 03/30/2013	03/31/2009 - 03/30/2010	Approved	<a href="#">Log</a>
Aticus/ Finch	DEMO456		999999999	\$84,723.00	03/31/2008 - 03/30/2013	03/31/2008 - 03/30/2009	Approved	<a href="#">Log</a>
Aticus/ Finch	TEST005		999999999	\$94,000.00	02/14/2006 - 02/14/2009	02/15/2007 - 02/14/2008	Approved	<a href="#">Log</a>
Aticus/ Finch	JAV4002		999999999	\$94,000.00	03/03/2006 - 03/31/2015	03/03/2006 - 03/03/2008	Approved	<a href="#">Log</a>
Aticus/ Finch	AMERIO1	1	999999999	\$1,000.00	07/01/2008 - 12/31/2010	07/01/2008 - 12/31/2009	Approved	<a href="#">Log</a>
Aticus/ Finch	AMERIO2	2	999999999	\$1,000.00	07/01/2008 - 12/31/2010	07/01/2008 - 12/31/2009	Approved	<a href="#">Log</a>
Aticus/ Finch	AMERIO3	3	999999999	\$1,000.00	07/01/2008 - 12/31/2010	07/01/2008 - 12/31/2009	Approved	<a href="#">Log</a>
Aticus/ Finch	AMERIO4	4	999999999	\$1,000.00	07/01/2008 - 12/31/2010	07/01/2008 - 12/31/2009	Approved	<a href="#">Log</a>

1 2 3 4 5 6 7 8

Approved Contract List

Contract Info

Period Info

Action Column

Log Program Report

# Contract Management System Program Report Processing – Overview

## Program Report Log Page

**NEW YORK STATE**  
Office of Children and Family Services  
CONTRACT MANAGEMENT SYSTEM (CMS) USER MANUAL | FAQ | WEDNESDAY, OCTOBER 1 2008

PROGRAM REPORT LOG

Finch, Scout [CONUSER] [LOGOUT](#)

[HOME](#)  
[INBOX](#)  
[CONTRACTOR](#)  
[DETAILS](#)  
[LOG SCREEN](#)  
[CLAIM](#)  
[BUDGET MODIFICATION](#)  
[PROGRAM REPORTS](#)  
[CONTRACTS](#)  
[LIST](#)  
[CORRESPONDENCE](#)  
[SEARCH](#)

Contract Number: AMER104  
Contractor Name: Atticus/ Finch  
Contract Period: 07/01/2008 To 12/31/2009  
Reviewer: Finch, Scout

**REPORT DETAILS**

Date Received: 10/1/2008  
Report Type:  Interim/Final  Supplemental  
Due Date: 03/31/2009  
Report Period: 09/01/2008 to 02/28/2009

[Log](#) [Next](#)

Program Report Information

Contract Information

Report Details

Types of Reports

Interim Reports

Supplemental Reports

Log the Reports

# Contract Management System Program Report Processing – Overview

## Program Report Log Page

Processing the Report

Office of Children and Family Services  
CONTRACT MANAGEMENT SYSTEM (CMS)

USER MANUAL | FAQ | WEDNESDAY, OCTOBER 1 2008

Finch, Scout [CONUSER ]  
LOGOUT

PROGRAM REPORT LOG

Program Report logged Successfully

HOME  
INBOX  
CONTRACTOR  
DETAILS  
LOG SCREEN  
CLAIM  
BUDGET MODIFICATION  
PROGRAM REPORTS  
CONTRACTS  
LIST  
CORRESPONDENCE  
SEARCH

Contract Number: AMER04  
Contractor Name: Atticus/ Finch  
Contract Period: 07/01/2008 To 12/31/2009  
Reviewer: Finch, Scout

REPORT DETAILS

Date Received: 10/1/2008  
Report Type:  Interim/Final Due Date: 03/31/2009  
 Supplemental  
Report Period: 09/01/2008 to 02/28/2009

Log Next

# Contract Management System Program Report Processing – Overview

## Program Report Review Module Page

### Processing the Report Info

Contract Properties

Report Properties

Documents

Interactive Documents

Downloadable Documents

Upload Documents

Office of Children and Family Services  
CONTRACT MANAGEMENT SYSTEM (CMS) USER MANUAL | FAQ | WEDNESDAY, OCTOBER 1 2008

Finch, Scout [CONUSER] [LOGOUT](#) PROGRAM REPORT REVIEW MODULE

**CONTRACT PROPERTIES**

Contract# AMERI04  
Contractor Atticus/ Finch  
Period Begin 07/01/2008 Period End 12/31/2009  
Reviewer Stage With Contractor

**PROGRAM REPORT PROPERTIES**

Report Type INTERIM Due Date 03/31/2009  
Report Period 09/01/2008 - 02/28/2009  
Received Date 10/01/2008 Status PENDING

**SCHEDULE** [show](#) | [hide](#)

**INTERACTIVE DOCUMENTS** PROGRAM REPORT

[DOCUMENTS ACTION](#)  
No Documents found View Program Report

**DOWNLOAD DOCUMENTS** UPLOAD DOCUMENTS Upload Document

DOCUMENTS	DOWNLOAD	DOCUMENT NAME	DATE UPLOADED	STATUS	DATE REVIEWED
AmeriCorps Program Report	<a href="#">Download</a>				

[Correspondence](#) [Cancel](#) [Complete](#)

# Contract Management System Program Report Processing – Overview

## Program Report Review Module Page

Processing the Report Info  
Using Correspondence  
Viewing the Schedule

FINCH OF COURTESY AND I AM NOT SURE  
CONTRACT MANAGEMENT SYSTEM (CMS) USER MANUAL | FAQ | WEDNESDAY, OCTOBER 1 2008

Finch, Scout [CONUSER] [LOGOUT](#)

PROGRAM REPORT REVIEW MODULE

[HOME](#)

[INBOX](#)

[CONTRACTOR](#)

[DETAILS](#)

[LOG SCREEN](#)

[CLAIM](#)

[BUDGET MODIFICATION](#)

[PROGRAM REPORTS](#)

[CONTRACTS](#)

[LIST](#)

[CORRESPONDENCE](#)

[SEARCH](#)

**CONTRACT PROPERTIES**

Contract# AMER104

Contractor Atticus/ Finch

Period Begin 07/01/2008 Period End 12/31/2009

Reviewer Stage With Contractor

**PROGRAM REPORT PROPERTIES**

Report Type INTERIM Due Date 03/31/2009

Report Period 09/01/2008 - 02/28/2009

Received Date 10/01/2008 Status PENDING

**SCHEDULE** [show](#) | [hide](#)

REVIEW STAGE	ROLE	START DATE	END DATE	SCHEDULED DAYS	ACTUAL DAYS	SUSPENDED DAYS	REVIEW STATUS
With Contractor	CONUSER	10/01/08			1	0	Pending
Program1	CMSADMIN				1	0	

**INTERACTIVE DOCUMENTS** **PROGRAM REPORT**

[DOCUMENTS ACTION](#)  
No Documents Found [View Program Report](#)

**DOWNLOAD DOCUMENTS** **UPLOAD DOCUMENTS** [Upload Document](#)

DOCUMENTS	DOWNLOAD	DOCUMENT NAME	DATE UPLOADED	STATUS	DATE REVIEWED
	<a href="#">Download</a>	AmeriCorps Program Report			

[Correspondence](#) [Cancel](#) [Complete](#)

# Contract Management System Program Report Processing – Overview

## Program Report Review Module Page

Processing the Report Info  
Completing the Stage

Office of Children and Family Services  
CONTRACT MANAGEMENT SYSTEM (CMS)

USER MANUAL | FAQ | WEDNESDAY, OCTOBER 1 2008

Finch, Scout [CONUSER ]  
LOGOUT

PROGRAM REPORT REVIEW MODULE

HOME  
INBOX  
CONTRACTOR  
DETAILS  
LOG SCREEN  
CLAIM  
BUDGET MODIFICATION  
PROGRAM REPORTS  
CONTRACTS  
LIST  
CORRESPONDENCE  
SEARCH

CONTRACT PROPERTIES

Contract# AMERI04  
Contractor Atticus/ Finch  
Period Begin 07/01/2008 Period End 12/31/2009  
Reviewer Stage With Contractor

PROGRAM REPORT PROPERTIES

Report Type INTERIM  
Report Period 09/01/2009  
Received Date 10/01/2009  
PENDING

SCHEDULE [show](#) | [hide](#)

REVIEW STAGE	ROLE	START DATE	END DATE	SCHEDULED DAYS	ACTUAL DAYS	SUSPENDED DAYS	REVIEW STATUS
With Contractor	CONUSER	10/01/08			1	0	Pending
Program1	CMSADMIN				1	0	

INTERACTIVE DOCUMENTS

[DOCUMENT ACTION](#)  
No Documents found

PROGRAM REPORT [View Program Report](#)

DOWNLOAD DOCUMENTS

DOCUMENTS [DOWNLOAD](#)  
AmeriCorps Program Report [Download](#)

UPLOAD DOCUMENTS [Upload Document](#)

DOCUMENT NAME	DATE UPLOADED	STATUS	DATE REVIEWED

[Correspondence](#) [Cancel](#) [Complete](#)

Windows Internet Explorer  
Have you completed all required documents?  
OK Cancel

# Contract Management System Contract Review – Overview

## Home Page

The screenshot shows the Contractor Management System (CMS) home page. The browser title is "Contractor Details - Windows Internet Explorer" and the address bar shows "https://ocfsws.ocfs.state.ny.us/cms/Contractors/ContractorHome.aspx". The page header includes the New York State logo and the text "Office of Children and Family Services CONTRACT MANAGEMENT SYSTEM (CMS)". A navigation menu on the left lists options such as "HOME", "INBOX", "CONTRACTOR DETAILS", "LOG SCREEN", "CLAIM", "BUDGET MODIFICATION", "PROGRAM REPORTS", "CONTRACTS LIST", "CORRESPONDENCE", and "SEARCH". The main content area features the "OCFSCMS Contract Management System" logo and a "Welcome to the Contract Management System" message. A central "ANNOUNCEMENTS" section titled "What's New in CMS!" includes a sub-section "Introducing Online Claim Processing!" and "We Continue to Grow!". A right-hand "INBOX" section displays a notification: "You have 43 task in your inbox go to your [INBOX](#)". Below this is an "INSTRUCTIONS" section titled "Deletion of Authorized Users from CMS" with a link to a "Contract Developer and Contract Signatory Authorization Form". The footer of the browser window shows "Local intranet" and "100%" zoom.

Main Menu

Viewing a Contract

# Contract Management System Contract Review – Overview

## Contract List Page

Main Menu

Viewing a Contract

NEW YORK STATE  
Office of Children and Family Services  
CONTRACT MANAGEMENT SYSTEM (CMS)

Finch, Scout [CONUSER]  
LOGOUT

CONTRACT LIST

CONTRACT #	CONTRACTOR	AWARD #	PROJECT NAME	FED ID/MUNI CODE	AMOUNT	TERM AMOUNT	CONTRACT TERM	STATUS
<a href="#">TEST003</a>	Atticus/ Finch			999999999	\$100,000.00	\$100,000.00	02/14/2006 - 02/14/2009	In Process
<a href="#">TEST006</a>	Atticus/ Finch			999999999	\$100,000.00	\$100,000.00	02/14/2006 - 02/14/2009	Approved
<a href="#">TEST999</a>	Atticus/ Finch			999999999	\$200,000.00	\$200,000.00	02/14/2006 - 02/14/2009	In Process
<a href="#">TEST111</a>	Atticus/ Finch			999999999	\$1,100.00	\$1,100.00	02/14/2006 - 02/14/2009	Approved
<a href="#">TEST222</a>	Atticus/ Finch			999999999	\$50,000.00	\$50,000.00	02/14/2006 - 02/14/2009	In Process
<a href="#">TESTDAY</a>	Atticus/ Finch			999999999	\$100,000.00	\$100,000.00	02/14/2006 - 02/14/2009	Cancelled - Duplicate
<a href="#">TEST333</a>	Atticus/ Finch	CC 02	Testing a Training Contract	999999999	\$1,000,000.00	\$1,000,000.00	02/14/2006 - 02/14/2009	In Process
<a href="#">TEST007</a>	Atticus/ Finch			999999999	\$68,298.00	\$68,298.00	02/14/2006 - 02/14/2009	In Process
<a href="#">TEST444</a>	Atticus/ Finch	sdpp docs		999999999	\$10,000.00	\$10,000.00	02/14/2006 - 02/13/2011	In Process
<a href="#">FISH554</a>	Atticus/ Finch			999999999	\$1,000.00	\$1,000.00	05/01/2005 - 12/31/2005	In Process
<a href="#">DEMO321</a>	Atticus/ Finch			999999999	\$1,000.00	\$1,000.00	03/31/2008 - 03/30/2013	Approved
<a href="#">DEMO854</a>	Atticus/ Finch			999999999	\$1,000.00	\$1,000.00	03/01/2008 - 02/28/2011	Approved
<a href="#">DEMO123</a>	Atticus/ Finch			999999999	\$94,000.00	\$188,000.00	03/31/2008 - 03/30/2013	Approved
<a href="#">DEMO456</a>	Atticus/ Finch			999999999	\$84,723.00	\$84,723.00	03/31/2008 - 03/30/2013	Approved
<a href="#">TEST005</a>	Atticus/ Finch			999999999	\$94,000.00	\$194,000.00	02/14/2006 - 02/14/2009	Approved
<a href="#">JAV4002</a>	Atticus/ Finch			999999999	\$94,000.00	\$94,000.00	03/03/2006 - 03/31/2015	Approved
<a href="#">AMERIO1</a>	Atticus/ Finch	1		999999999	\$1,000.00	\$1,000.00	07/01/2008 - 12/31/2010	Approved
<a href="#">AMERIO2</a>	Atticus/ Finch	2		999999999	\$1,000.00	\$1,000.00	07/01/2008 - 12/31/2010	Approved
<a href="#">AMERIO3</a>	Atticus/ Finch	3		999999999	\$1,000.00	\$1,000.00	07/01/2008 - 12/31/2010	Approved
<a href="#">AMERIO4</a>	Atticus/ Finch	4		999999999	\$1,000.00	\$1,000.00	07/01/2008 - 12/31/2010	Approved

# Contract Management System

## Contract Review – Overview

### Contract Details Page

- Viewing Contract Details
- Viewing a Claim
- Viewing a Program Report

Finch, Scout [CONUSER]  
LOGOUT

HOME  
INBOX  
CONTRACTOR  
DETAILS  
LOG SCREEN  
CLAIM  
BUDGET MODIFICATION  
PROGRAM REPORTS  
CONTRACTS  
LIST  
CORRESPONDENCE  
SEARCH

CONTRACT DETAILS

CONTRACT DOCUMENTS BUDGET

CONTRACT GENERAL INFORMATION

Contract# AMERI04 Status Approved

Contractor Name Atticus/ Finch

Project Name

Award # 4

Term From 07/01/2008 Term To 12/31/2010

CONTRACT PERIODS

07/01/2008 - 12/31/2009

SCHEDULE [show](#) | [hide](#)

AMENDMENTS

SELECT	AMENDMENT TYPE	STATUS
<a href="#">Details</a>	Initial	Approved

CONTRACT PERIOD INFO

Contract# AMERI04 Contract Period Status Approved

Contractor Name Atticus/ Finch

Contract Term From 07/01/2008 To 12/31/2010

Contract Period From 07/01/2008 To 12/31/2009

Award Date 07/01/2008 Amount(\$ 1,000.00

Approval Date 09/30/2008

FINANCIAL SUMMARY

Total Contract Amount	\$1,000.00	Unencumbered Balance	\$0.00
Encumbered to Date	\$1,000.00	Total Advanced	\$0.00
<a href="#">Contractor Expended to Date</a>	\$0.00	Advance Recouped	\$0.00
Paid to Date	\$0.00	Advance Receivable	\$0.00
Encumbered Balance	\$1,000.00	Retainage Balance	\$0.00

[Claim History](#) [Program Reports](#)

Correspondence

# Contract Management System Contract Review – Overview

## Claim History Report Page

The screenshot displays the 'CLAIM HISTORY REPORT' page in the New York State Contract Management System (CMS). The page header includes the New York State logo, the text 'NEW YORK STATE', and 'Office of Children and Family Services CONTRACT MANAGEMENT SYSTEM (CMS)'. The user is identified as 'Finch, Scout [CONUSER]' with a 'LOGOUT' link. The date is 'WEDNESDAY, OCTOBER 1 2008'. The page title is 'CLAIM HISTORY REPORT'.

**CONTRACT DETAILS**

Contract #: AMER104 Contract Period: 7/1/2008 To 12/31/2009  
Contractor: Atticus/ Finch  
Expenditures To Date: \$0.00 Paid To Date: \$0.00

**EXPENDITURE LIST**

EXPEND PERIOD	CLAIM TYPE	TRAN TYPE	RECEIVED DATE	STATUS	REF INV #	AMOUNT REPORTED	PAYMENT	DETAILS
09/01/08 To 09/30/08	Expenditure		10/01/08	In Process	AMER104	\$1,000.00	\$500.00	<a href="#">Details</a>

Left sidebar navigation menu:

- HOME
- INBOX
- CONTRACTOR
- DETAILS
- LOG SCREEN
- CLAIM
- BUDGET MODIFICATION
- PROGRAM REPORTS
- CONTRACTS
- LIST
- CORRESPONDENCE
- SEARCH

Viewing a Claim  
Claim Details

# Contract Management System

## Contract Review – Overview

### Claim History Report Page

**NEW YORK STATE**  
Office of Children and Family Services  
CONTRACT MANAGEMENT SYSTEM (CMS) User Manual | FAQ | Wednesday, October 1, 2008

Finch, Scout [CONUSER] EXPENDITURE REPORT HISTORY DETAILS  
[Logout](#)

**CONTRACT DETAILS**

Contractor:	Atticus/ Finch		
Contract #:	AMER104	Contract Amount:	\$1,000.00
Contract Period:	7/1/2008 To 12/31/2009		

**EXPENDITURE DETAILS**

**SCHEDULE INFORMATION**

Expenditure Period:	09/01/08 To 09/30/08		
Withhold/Claim Notes:			
Claim Type:	Expenditure	Expenditure Amount:	\$1,000.00
RefInvoice #:	AMER104	Adjusted Expenditures:	\$500.00
Voucher #:		Advance Recoup:	\$0.00
Batch #:		Withholding/Retainage:	\$0.00
Received Date:	10/01/08	Balance Due:	\$0.00
Date ProcessedCAPS:		Payment:	\$0.00
Date Paid:	<input type="text"/>	Amount Paid:	
Transaction Type:		Check/EFT#:	
Claim Status:	In Process	Voucher Status:	

[Process](#)

**CLAIMS**

[CLAIM REPORTS MODULE](#)

[CORRESPONDENCE](#)

[Print](#)

Viewing a Claim  
Claim Information

# Contract Management System

## Contract Review – Overview

### Contract Details Page

Viewing Contract Details  
Viewing a Program Report

Finch, Scout [CONUSER]  
LOGOUT

HOME  
INBOX  
CONTRACTOR  
DETAILS  
LOG SCREEN  
CLAIM  
BUDGET MODIFICATION  
PROGRAM REPORTS  
CONTRACTS  
LIST  
CORRESPONDENCE  
SEARCH

CONTRACT DETAILS

CONTRACT DOCUMENTS BUDGET

CONTRACT GENERAL INFORMATION

Contract# AMERI04 Status Approved  
Contractor Name Atticus/ Finch  
Project Name  
Award # 4  
Term From 07/01/2008 Term To 12/31/2010

CONTRACT PERIODS

07/01/2008 - 12/31/2009

SCHEDULE [show](#) | [hide](#)

AMENDMENTS

SELECT	AMENDMENT TYPE	STATUS
<a href="#">Details</a>	Initial	Approved

CONTRACT PERIOD INFO

Contract# AMERI04 Contract Period Status Approved  
Contractor Name Atticus/ Finch  
Contract Term From 07/01/2008 To 12/31/2010  
Contract Period From 07/01/2008 To 12/31/2009  
Award Date 07/01/2008 Amount(\$ 1,000.00  
Approval Date 09/30/2008

FINANCIAL SUMMARY

Total Contract Amount	\$1,000.00	Unencumbered Balance	\$0.00
Encumbered to Date	\$1,000.00	Total Advanced	\$0.00
<a href="#">Contractor Expended to Date</a>	\$0.00	Advance Recouped	\$0.00
Paid to Date	\$0.00	Advance Receivable	\$0.00
Encumbered Balance	\$1,000.00	Retainage Balance	\$0.00

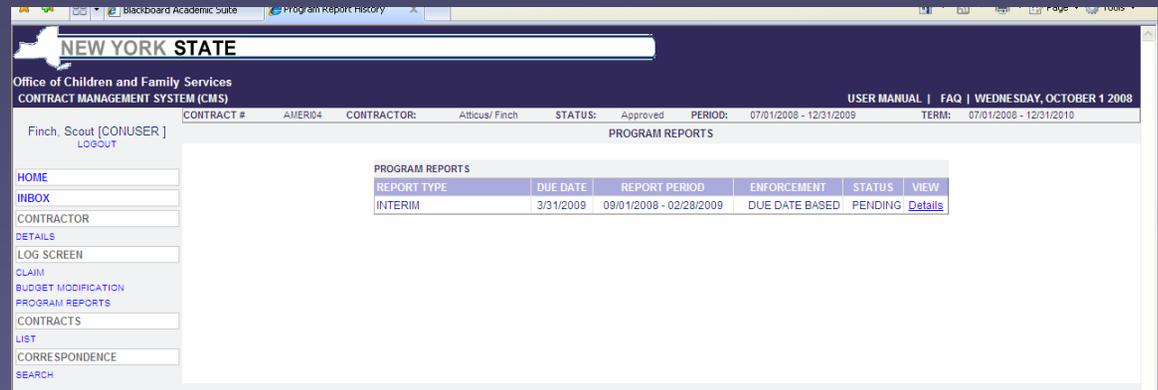
[Claim History](#) [Program Reports](#)

Correspondence

# Contract Management System Contract Review – Overview

## Program Reports Page

Viewing a Program Reports  
Report Details



NEW YORK STATE

Office of Children and Family Services  
CONTRACT MANAGEMENT SYSTEM (CMS)

USER MANUAL | FAQ | WEDNESDAY, OCTOBER 1 2008

CONTRACT # AMER04 CONTRACTOR: Alticus/ Finch STATUS: Approved PERIOD: 07/01/2008 - 12/31/2009 TERM: 07/01/2008 - 12/31/2010

Finch, Scout [CONUSER]  
LOGOUT

PROGRAM REPORTS

REPORT TYPE	DUE DATE	REPORT PERIOD	ENFORCEMENT	STATUS	VIEW
INTERIM	3/31/2009	09/01/2008 - 02/28/2009	DUE DATE BASED	PENDING	<a href="#">Details</a>

HOME  
INBOX  
CONTRACTOR  
DETAILS  
LOG SCREEN  
CLAIM  
BUDGET MODIFICATION  
PROGRAM REPORTS  
CONTRACTS  
LIST  
CORRESPONDENCE  
SEARCH

# Contract Management System Contract Review – Overview

## Program Reports Page

Viewing a Program Reports  
Report Information

Office of Children and Family Services  
CONTRACT MANAGEMENT SYSTEM (CMS)

USER MANUAL | FAQ | WEDNESDAY, OCTOBER 1 2008

CONTRACT # AMER04 CONTRACTOR: Atticus/ Finch STATUS: Approved PERIOD: 07/01/2008 - 12/31/2009 TERM: 07/01/2008 - 12/31/2010

Finch, Scout [CONUSER] LOGOUT

**PROGRAM REPORTS**

[Back](#)

**CONTRACT PROPERTIES**

Contract# AMER04  
 Contractor Atticus/ Finch  
 Period Begin 07/01/2008 Period End 12/31/2009

**PROGRAM REPORT PROPERTIES**

Report Type INTERIM Due Date 03/31/2009  
 Report Period 09/01/2008 - 02/28/2009  
 Received Date 10/01/2008 Status PENDING

**CHANGE HISTORY**

REPORT TYPE	DUE DATE	REPORT PERIOD	UPDATE ON	REVIEWER	COMMENTS
INTERIM	03/31/2009	09/01/2008 - 02/28/2009	09/30/2008	Porter, Alyce	Original

**SCHEDULE**

REVIEW STAGE	REVIEWER	ROLE	START DATE	END DATE	SCHEDULED DAYS	ACTUAL DAYS	SUSPENDED DAYS	REVIEW STATUS
With Contractor	Finch, Scout	CONUSER	10/01/2008	10/01/2008	1	0	0	Complete
Program1	Porter, Alyce	CMSADMIN	10/01/2008		1	0	0	Pending

**VIEW PROGRAM REPORT**

[View Program Report](#)

**UPLOADED DOCUMENTS**

DOCUMENT NAME	DATE UPLOADED	STATUS	DATE REVIEWED	VIEW
No Uploaded documents				

HOME  
 INBOX  
 CONTRACTOR  
 DETAILS  
 LOG SCREEN  
 CLAIM  
 BUDGET MODIFICATION  
 PROGRAM REPORTS  
 CONTRACTS  
 LIST  
 CORRESPONDENCE  
 SEARCH

# Contract Management System Contract Review – Overview

## Home Page

The screenshot shows a web browser window titled "Contractor Details - Windows Internet Explorer". The address bar displays "https://ocfsws.ocfs.state.ny.us/cms/Contractors/ContractorHome.aspx". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The page content is for the "NEW YORK STATE" Office of Children and Family Services, specifically the "CONTRACT MANAGEMENT SYSTEM (CMS)".

**Navigation Links (Left Sidebar):**

- Finch, Scout [CONUSER] LOGOUT
- HOME
- INBOX
- CONTRACTOR DETAILS
- LOG SCREEN
- CLAIM
- BUDGET MODIFICATION
- PROGRAM REPORTS
- CONTRACTS LIST
- CORRESPONDENCE
- SEARCH

**OCFS CMS Logo:** Contract Management System

**Welcome to the Contract Management System**

**ANNOUNCEMENTS**  
MAY/JUNE 2008

### What's New in CMS!

#### Introducing Online Claim Processing!

The Division of Administration, Bureau of Contract Management is pleased to announce the expansion of the online claim and program report pilot. This planned expansion is the result of positive feedback from contractors as well as the preliminary evidence that the new functionality does in fact produce the projected efficiencies in payment processes. Note that OCFS pre approval is necessary in order for contractors to access this functionality. For information about the pilot, please contact the CMS Help Desk at the number provided below.

#### We Continue to Grow!

The CMS user community has grown to 3,586, which includes 295 new accounts created since December of 2007. As of March 31, 2008, OCFS has signed a total of 1,231 contracts online.

#### Did You Know?

OCFS relies on CMS as the system of record for maintaining contact information for the organizations and vendors with which it contracts. As such, it is imperative that if your organization undergoes a change in leadership, such as the hiring of a new Executive Director or Chief Financial Officer, you notify your OFCS Program Manager, in writing of such changes, in a timely manner. Also please verify that the email address is correct.

**INBOX**

You have 43 task in your inbox go to your [INBOX](#)

**INSTRUCTIONS**  
Deletion of Authorized Users from CMS

Please be advised that it is the responsibility of each organization to notify Mr. William Gaudette of the NYS Office of Children and Family Services, Bureau of Contract Management, whenever a CMS account needs to be terminated. Organizations are required to terminate the authorization to develop and/or sign contracts whenever an employee leaves the organization. The Contract Developer and Contract Signatory Authorization Form must be submitted to delete as well as to add authorized users. This form can be found by clicking on the link provided below. The form requires an original signature, therefore it cannot be submitted online. Please mail completed authorization forms to Mr. William Gaudette at the address indicated in the instructions.

[Contract Developer and Contract Signatory Authorization Form](#)

[Instructions for Completing the Contract Developer and Contract Signatory Authorization Form](#)

Local intranet 100%