

Contract Portal

User Manual

Westchester County Department of Information Technology



Westchester
gov.com

George Latimer
Westchester County Executive

October 27, 2014

Table of Contents

1. Overview	3
2. Accessing the application	3
3. Account Management	4
3.1 Account Login.....	4
3.2 Manage Contacts	5
4. Program	6
4.1 New Program	7
4.2 Search Program.....	8
5. Contract.....	9
5.1 New Contract	10
5.1.1 Contract Number and OnBase ID.....	10
5.1.2 Selecting and Notifying a Vendor.....	11
5.1.3 Contact Person(s) and Select Program(s)	12
5.1.4 Budget.....	13
5.2 Search Contract.....	17
6. Budget Modification.....	18
6.1 Budget Modification Queue.....	19
6.2 Budget Modification Details	21
7. Claims.....	22
6.1 Claim Details.....	22
7.2 Supplemental Claim.....	24
8. Performance Reporting.....	26
6.1 Performace Indicators	26
8.2 Associate Contract with Performance Indicators.....	28
8.3 View Performance Reports	30
9. Support.....	30

1. Overview

The Contract Portal is a web-based application **that will help** authorized county users efficiently manage information related to the County's contracting process **by communicating with the Vendors**. This is similar to the Vendor Portal where vendors upload documents and manage their information related to the County's contracting process.

Programs established for residents of Westchester County Residents are typically provided by not-for-profit agencies under a contract with the county department responsible for that program. This system provides a framework where the programs and each of the contracts that are within those programs can be defined. It is understood that in some cases, a contract may not be within any program, so the system allows for such scenarios. Department users and vendors can now plan and manage budgets, **claims** and upload documents for these contracts using their respective portals.

The following is a brief overview of the steps in Contract Portal and Vendor Portal.

1. Department user saves information about a program in Contract Portal (Section 4).
2. Vendor creates an account in Vendor Portal.
3. Department user enters contract information in Contract Portal after procurement and notifies vendor (Section 5).
4. Vendor enters and submits budget details and uploads documents for the contract.
5. Department reviews budgets and documents and approves or requests modification.
6. Once budgets are approved any change to budgets will be through budget modification process (Section 6).
7. Vendor enters the claim details with supporting documents and submits it.
8. Department reviews the claim and approves or requests to change.
9. Once the claim is approved any changes to claim will go through Supplemental claim process.
10. Performance benchmarks will be defined by the department by creating performance Indicators for a program and then associating them with a contract and submitting it to Vendors.
11. Vendors will create reports and submit them back to the department.

2. Accessing the application

You can go directly to the contract portal by opening your web browser and typing:

<http://contractportal.westchestergov.com/> into the Address or URL field at the top of a web browser. Contract portal is accessible only within the county network.

Vendors can access the vendor portal from the Internet by typing

<https://vendorportal.westchestergov.com> into the Address or URL field of a web browser. The user guide for the vendor portal is available at <http://www.westchestergov.com/vendorportal>.

3. Account Management

Each department will have one or more administrators. These administrators can add as many users as needed within their department.

3.1 Account Login

If you are an authorized user of the portal you can use your county network ID and password to login.

The screenshot shows a Microsoft Internet Explorer browser window titled "Login - Microsoft Internet Explorer provided by Westchester County". The address bar displays "https://secure05.westchestergov.com/cportal". The page features the "Westchester gov.com" logo and the title "Department Contract Portal". Below this is a "Login" section with the instruction "Please enter your user name and password." A login form contains two input fields: "User Name: *" and "Password: *". A red arrow points to the "User Name" field with the text "Enter Username and password to login." A "Login" button is positioned below the fields. At the bottom of the page, there is a footer with "Disclaimer / Privacy Policy", "© Copyright 2014 Westchestergov.com", and a status bar indicating "Trusted sites | Protected Mode: Off" and "100%".

Westchester gov.com

Department Contract Portal

Login

Please enter your user name and password.

Login

User Name: *

Password: *

Login

Enter Username and password to login.

Disclaimer / Privacy Policy
© Copyright 2014 Westchestergov.com

Trusted sites | Protected Mode: Off

100%

3.2 Manage Contacts

If you are an administrator you can add or delete users in your department. The delete or add button will not be displayed for a user without administrator privileges.

Department User - Microsoft Internet Explorer provided by Westchester County

https://secure05.westchestergov.com/cportal/deptuser

File Edit View Favorites Tools Help

Google Search Share More Sign In

Westchester.gov

Department Contract Portal

Home > Manage Contacts

Manage Contacts

Manage Contacts

User ID	Email	First Name	Last Name	Department	Phone Number	Action
nqka	nqka@westchestergov.com	Neeraj	IKumar	IT	9142162066	Delete
gqs2	gqs2@westchestergov.com	Girija	Sethuraman	IT	9149955014	Delete
mkd3	mkd3@westchestergov.com	Mary Kate	Cabaleiro	CEO	9159952753	Delete
sed2	sed2@westchestergov.com	Stephanie	Dechiaro	CEO	(914) 995-6580	Delete

Save Add User

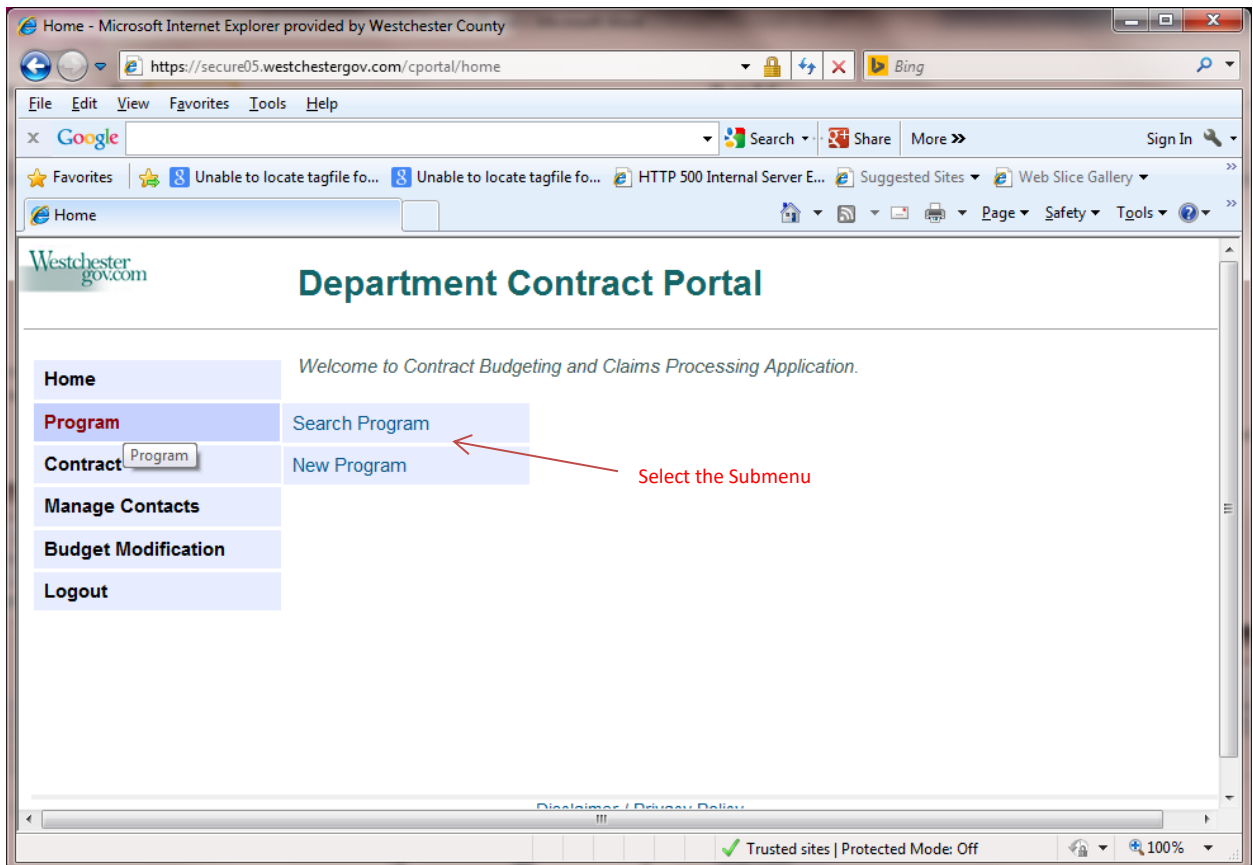
Disclaimer / Privacy Policy
© Copyright 2014 Westchestergov.com

Trusted sites | Protected Mode: Off

Add and delete button will only show up if you are an admin

4. Program

Options related to Programs can be accessed by clicking on the 'Program' item in the menu on the left side. This brings up a sub-menu with **Search Program** and **New Program** links that can be used to search for an existing program or create a new program. You can create a new program or search for an existing program and modify program information.



4.1 New Program

You can save information about a program such as the Program Title, the Program Code, Department code, Description etc. in the portal. You can also add multiple contacts for the program by dragging user names from **Available Contacts** and dropping it in the **Current Contacts** box. The information entered can be saved using the **Save** button.

The screenshot shows a web browser window titled "View Program - Microsoft Internet Explorer provided by Westchester County". The address bar shows the URL "https://secure05.westchestergov.com/cportal/viewProgram". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar contains a Google search bar, a search button, a share button, and a "More >>" button. The browser's status bar at the bottom shows "Done" and "Trusted sites | Protected Mode: Off".

The web page is titled "Department Contract Portal" and has a breadcrumb trail "Home > New Program". A left-hand navigation menu contains the following links: Home, Program, Contract, Manage Contacts, Budget Modification, and Logout. The main content area is titled "Program Information" and contains a "Program Details" section with the following fields:

- Title* (text input)
- Program Code (text input)
- Department Code* (dropdown menu showing "--- Select ---")
- Description of the Program* (text area)

Below the form fields is a section for "Contact Person(s) *". It includes a link "Go To [Manage Contacts](#) to Add/Edit Contacts" and a instruction "To Select Contact(s) for this Program Drag and Drop from Available Contacts to Current Contacts".

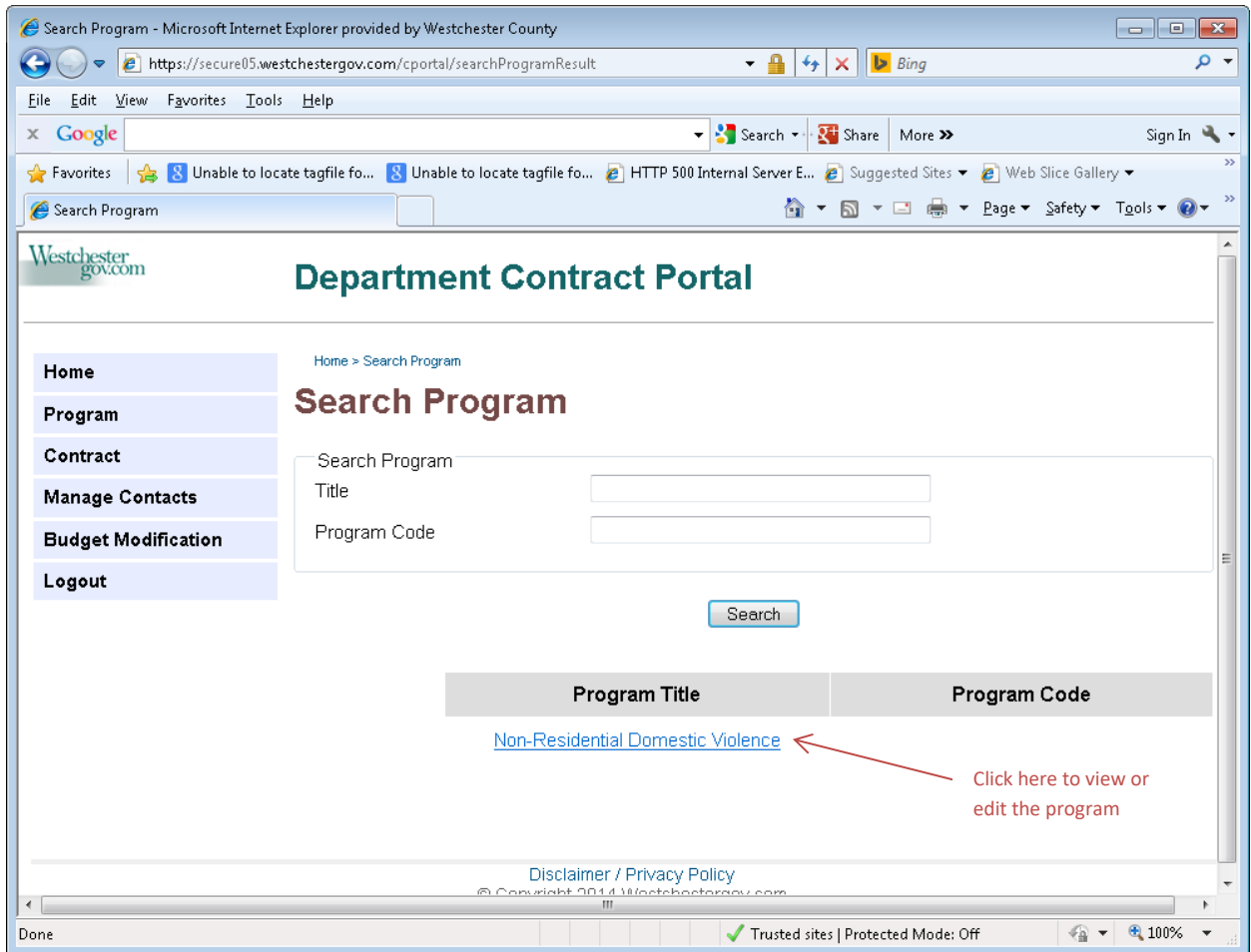
There are two contact lists:

- Available Contacts:** A table with two rows: "Dept User1" and "Dept User2".
- Current Contacts:** An empty box for dropping contacts.

At the bottom of the form are "Save" and "Back" buttons.

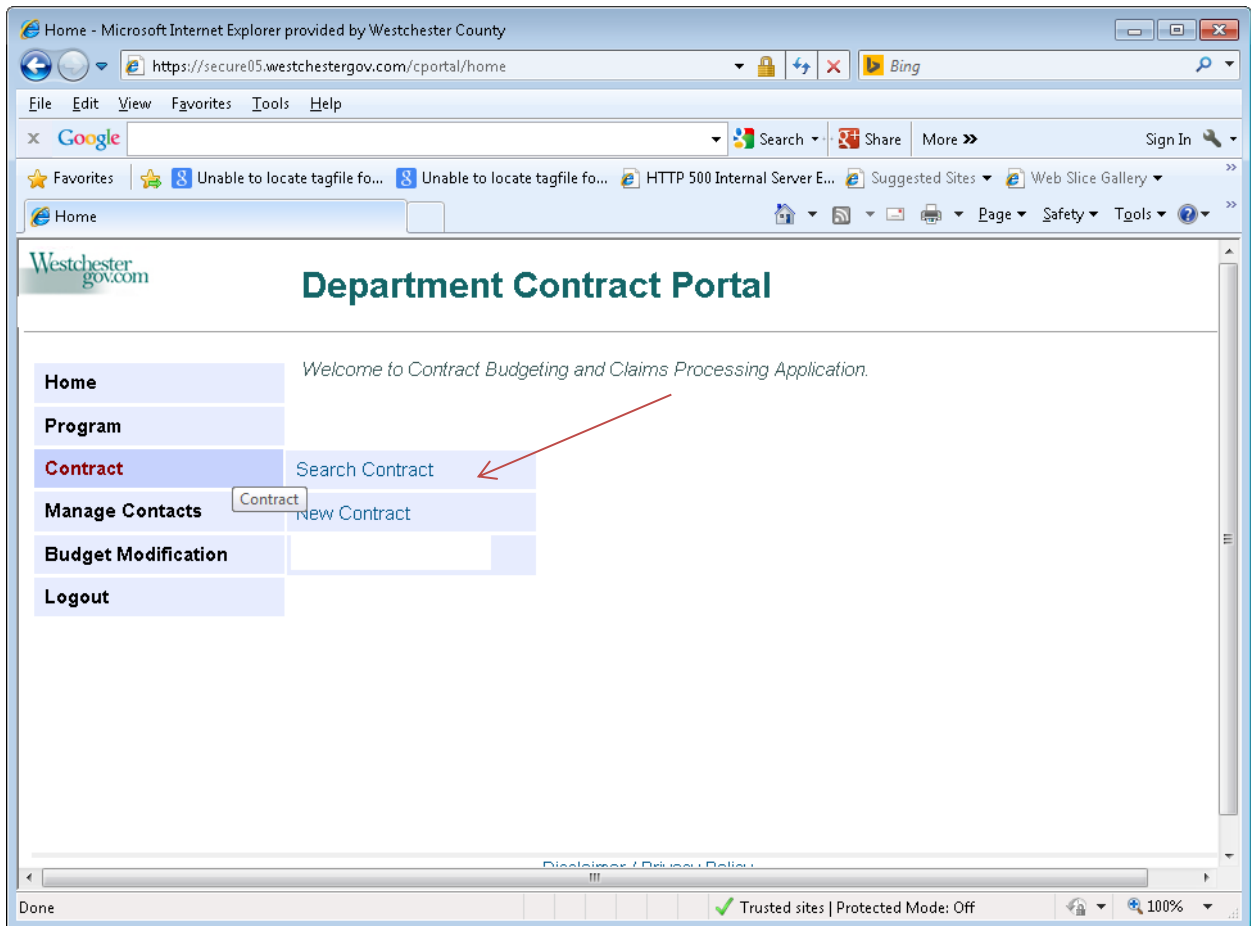
4.2 Search Program

You can search for programs in your department by entering the title of the program or the program code. You can click on the search results to open the program for viewing or editing.



5. Contract

Department users must define contract and save information about it within the system after completing their procurement process. Department users will associate a vendor and one or more programs to a contract. The vendors will then be able to enter a budget and upload documents for this contract using the **Vendor Portal**. The **Contract** item on the left side menu has **Search Contract** and **New Contract** sub menu items.



5.1 New Contract

You can enter contract information in the system after procurement. Required fields are marked with an asterisk. The information entered can be saved using save button. After saving a contract, **Notify Vendor** button will be enabled. By clicking on the **Notify Vendor** button, the vendor will get an automated notification email from the system. Once vendor gets notified about a proposed contract associated with them, they can start entering budget details or upload documents for that contract.

5.1.1 Contract Number and OnBase ID

Contract Number and OnBase ID should be entered exactly as they were entered into the Contract Management workflow in OnBase. If there are no records for this contract in the Contract Management workflow in OnBase yet, you can leave these fields empty and enter it once you have that information. Even though Contract Number and OnBase ID are not required fields, a vendor will not be able to upload any documents through the Vendor Portal without this information.

The screenshot shows a web browser window displaying the 'Department Contract Portal' at <https://secure05.westchestergov.com/cportal/viewContract>. The page title is 'View Contract - Microsoft Internet Explorer provided by Westchester County'. The browser's address bar shows the URL. The page has a navigation menu on the left with links: Home, Program, Contract, Manage Contacts, Budget Modification, and Logout. The main content area is titled 'New Contract Record' and contains a form for entering contract details. The form fields include: Contract Name*, Contract Number, OnBase ID, Start Date*, End Date*, Contact Person(s) [+]*, Select Program(s) [+]*, Not to Exceed Amount (NTE)* \$, Match* (radio buttons for Yes/No), Hold Back %, Payment Period (dropdown), Advance Payment (radio buttons for Yes/No), Define Budgets Periods [+], Budget Details [+], and Select Vendor (Enter Vendor name). Two red arrows point to the 'Contract Number' and 'OnBase ID' fields, with a text box stating: 'Contract Number and OnBase ID should match Contract Management Workflow in OnBase.' At the bottom of the form are 'Save Contract' and 'Notify Vendor' buttons. The footer of the page includes a 'Disclaimer / Privacy Policy' link, a copyright notice for 2014 Westchestergov.com, and a status bar indicating 'Trusted sites | Protected Mode: Off' and a zoom level of 100%.

View Contract - Microsoft Internet Explorer provided by Westchester County

<https://secure05.westchestergov.com/cportal/viewContract>

File Edit View Favorites Tools Help

Google Search Share More Sign In

Westchester.gov

Department Contract Portal

Home > New Contract

New Contract Record

Contract Record

Contract Name*

Contract Number

OnBase ID

Start Date*

End Date*

Contact Person(s) [+]*

Select Program(s) [+]*

Not to Exceed Amount (NTE)* \$

Match* ☐ Yes ☐ No

Hold Back %

Payment Period --- Select ---

Advance Payment ☐ Yes ☐ No

Define Budgets Periods [+]

Budget Details [+]

Select Vendor
(Enter Vendor name)

Save Contract Notify Vendor

Disclaimer / Privacy Policy
© Copyright 2014 Westchestergov.com

Trusted sites | Protected Mode: Off 100%

5.1.2 Selecting and Notifying a Vendor

Department users must then associate a vendor to a contract. They can search for a vendor in the system by typing the name of the vendor in **Select Vendor**. Only Vendors that are registered in Vendor Portal will show up in the autocomplete list.

The screenshot shows a web browser window titled "View Contract - Microsoft Internet Explorer provided by Westchester County". The address bar shows the URL "https://q-secure06.westchestergov.com/dcpdemo/viewContract". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The search bar contains the Google logo. The page has a left sidebar with a navigation menu containing links for Home, Program, Contract, Manage Contacts, Budget Modification, and Logout. The main content area is titled "New Contract Record" and contains a form with the following fields and options:

- Contract Record
- Contract Name* (Enter Contract Description)
- Select Vendor (Enter Vendor name) - A red arrow points to this field with the text "Enter the Name of the vendor".
- Contract Number
- OnBase ID
- Start Date*
- End Date*
- Contact Person(s) [*]
- Select Program(s) [*]
- Not to Exceed Amount (NTE)* \$
- Match* (Radio buttons for Yes and No)
- Hold Back %
- Payment Period (Dropdown menu with "Select" option)
- Advance Payment (Radio buttons for Yes and No)
- Define Budgets Periods [+]

The status bar at the bottom of the browser window shows "Done", "Trusted sites | Protected Mode: Off", and a zoom level of "100%".

5.1.3 Contact Person(s) and Select Program(s)

Contact Person(s) and **Select Program(s)** fields can be expanded by clicking on the [+] sign next to them. In the **Available Contact** box you will see all the users from your department. To assign contact person(s) for this contract, you can drag and drop from the **Available Contacts** box to the **Current Contacts** box. Current contacts will be displayed to vendors so that they can contact those on the list should they have any questions or concerns. There should be at least one contact named in the **Current Contacts** box. Users that are designated **Contacts** will get automated emails from the system for all updates regarding this contract. You can also drag and drop programs for this Contract from the **Available Programs** box to the **Current Programs** box. Please note that the **Contact Person(s)** and the **Select Program(s)** fields are required. If there are no programs associated with a contract, drag and drop “None” from the available program list. **Not to Exceed Amount** in this page is not visible to vendors.

View Contract - Microsoft Internet Explorer provided by Westchester County
https://secure05.westchestergov.com/cportal/viewContract

File Edit View Favorites Tools Help

Google Search Share More Sign In

View Contract

Budget Modification

Logout

OnBase ID

Start Date*

End Date*

Contact Person(s) [-]*

Go To [Manage Contacts](#) to Add/Edit Contacts

To select contact(s) for this program, drag and drop from Available Contacts to Current Contacts

Available Contacts

Current Contacts

Drag and drop the available contacts in to this box

Select Program(s) [-]*

To select program(s) drag and drop programs from Available Programs to Current Programs

Below Program List is a combination of [Program Title](#) + [ProgramCode \(If Any\)](#) + [System Generated ProgramID](#)

Available Programs

Current Programs

Drag and drop the available programs in to this box

Not to Exceed Amount (NTE)* \$

Match* ☐ Yes ☐ No

Hold Back %

Done

Trusted sites | Protected Mode: Off

100%

5.1.4 Budget

This is where Departments will define budget periods for each contract. If you do not want a vendor to submit budgets for this contract through the portal, you can skip this section. You can define more than one budget period for a contract. Also, one or more program can be selected for each budget period. Finally, you will have to select the budget type (such as cost-reimbursement, Lump sum and unit cost) for each budget. Budget information, including status and links to view budget entered by vendors, will appear under Budget Details.

View Contract - Microsoft Internet Explorer provided by Westchester County

https://q-secure06.westchestergov.com/dcpdemo/editContract

File Edit View Favorites Tools Help

Google Search Share More Sign In

View Contract

Define Budgets Periods

Start Date 01/01/2014 End Date 12/31/2014 1 of 8 selected Type* Cost-Reimbursement

Start Date 01/01/2014 End Date 12/31/2014 1 of 8 selected Type* Cost-Reimbursement

Start Date 01/01/2014 End Date 12/31/2014 2 of 8 selected Type* Cost-Reimbursement

Add Row

To view budget details

Budget Details[-]

Period	01/01/2014-12/31/2014	Status	Submitted	Modified Date	09/10/2014 15:35	Programs	Childrens S	Type	Cost-Reimk	View
Period	01/01/2014-12/31/2014	Status	InProcess	Modified Date	06/26/2014 13:42	Programs	Childrens S	Type	Cost-Reimk	
Period	01/01/2014-12/31/2014	Status	InProcess	Modified Date	10/02/2014 09:34	Programs	Court Servic	Type	Cost-Reimk	

Select Vendor Westchester Jewish Community Services, Inc.

Done Trusted sites | Protected Mode: Off 100%

Once a vendor gets a notification email about a proposed contract associated with them, they can start entering budget details. The vendor will only be able to see relevant information about contracts that are associated with them. The Vendor enters budget details depending on the type of the budget. When there is a match percentage, the budget detail will be for the full amount. When the vendor submits budget details, the department contact will be notified by email. Once submitted, the vendor will not be able to make changes to the budget, unless the department requests changes. Department users can review all budgets for a contract. They cannot edit line items that vendors have entered, but they can enter suggestions in the Department comment box under each category and request that the vendor modify those items using the **Request Change** button. This will send an automated email to the vendor requesting the changes. Department users can delete a budget using the **Delete** button, if the budget is not satisfactory, or they can approve the budget using the **Approve** button. Once approved, neither the department nor the vendor cannot modify or delete the budget. Once a budget is approved, the budgeting process is finished and any future changes must be performed through the budget modification process. The detailed budget or a summary of the budget can be exported as a PDF or an Excel document using the buttons in the last row.

Budget Details - Microsoft Internet Explorer provided by Westchester County

https://q-secure06.westchestergov.com/dcpdemo/viewBudgetDetails

File Edit View Favorites Tools Help

Google Search Share More Sign In

Budget Details

Home > View Contract > Contract Details >

Budget Details

Budget Details

Period Status

Program(s)

Please expand below items to enter budget details

Personnel [+]

Other than Personnel Service [+]

Total Budget

To generate Reports

Done Trusted sites | Protected Mode: Off 100%

You can click on **Personnel** [+] to see personnel line items which include the Fringe Amount, Fringe % etc. Each line has a check box to indicate if it is an executive position, and if marked as such, the **Vendor Portal** will display a warning to the vendor reminding them that they must comply with NYS Executive Order 38. You can see comments entered by vendors in Vendor Explanation box.

Budget Details - Microsoft Internet Explorer provided by Westchester County

https://q-secure06.westchestergov.com/dcpdemo/viewBudgetDetails

File Edit View Favorites Tools Help

Google Search Share More Sign In

Favorites Unable to locate tagfile fo... Unable to locate tagfile fo... HTTP 500 Internal Server E... Suggested Sites Web Slice Gallery icefaces 1.8 to 3.2 convers...

Budget Details

Please expand below items to enter budget details [Expand All](#)

Personnel [-]

Item No.	Position/Title	Personnel Name	Annual Salary	FTE%	Total Amount	Vendor Explanation	Executive
1	Program Director	Suzanne	70,000.00	75.00	52,500.00	Supervises program	<input type="checkbox"/>
2	Clinical Social Work	Dorothy	40,000.00	100.00	40,000.00	Provides services	<input type="checkbox"/>
3	Secretary	Someone	30,000.00	15.00	4,500.00	Office management	<input type="checkbox"/>
4	Site Director	Someone else	60,000.00	20.00	12,000.00	Assists program directo	<input type="checkbox"/>
Fringe Amount					39,795.90		
Fringe%					36.51		
Total Salaries					109,000.00		
Total Salaries and Fringe					148,795.90		
% of Total Salaries for executive personnel					0.00		

Vendor Explanation

Department Comments

Done

Trusted sites | Protected Mode: Off

100%

You can click on **Other than Personnel Service [+]** to see rest of the line items. There are subcategories under **Other than Personnel Service** which can be expanded by clicking on [+] next to each subcategory. You can view **Vendor Explanation** for each subcategory and enter your comments in the **Department Comments** field.

Budget Details - Microsoft Internet Explorer provided by Westchester County

https://q-secure06.westchestergov.com/dcpdemo/viewBudgetDetails

Equipment [-]

Item No.	Item	Amount
1	computer	50.00

Total Equipment Cost: 50

Vendor Explanation

Department Comments

Enter any Comments for the vendors

Supplies [-]

Item No.	Item	Amount
1	program suppli	100.00
2	office supplies	75.00
3	computer suppl	60.00

Total Supplies Cost: 235

Vendor Explanation

Department Comments

Done

Trusted sites | Protected Mode: Off

100%

5.2 Search Contract

Once a contract is saved in the system you can search for it using the **Search Contract** link. You can view or edit contract information. You can search for a contract using the contract name, number or status. You can click on the search results to open a contract for viewing or editing. You can edit contract information until all budgets are approved or the contract is executed.

Search Contract

Select any option from Contract Name or Contract Number (or both) to view the required contract

'Contract Name' search box is a combination of System Generated ContractID - Contract Name - StartDate - EndDate

Contract Name

Contract Number

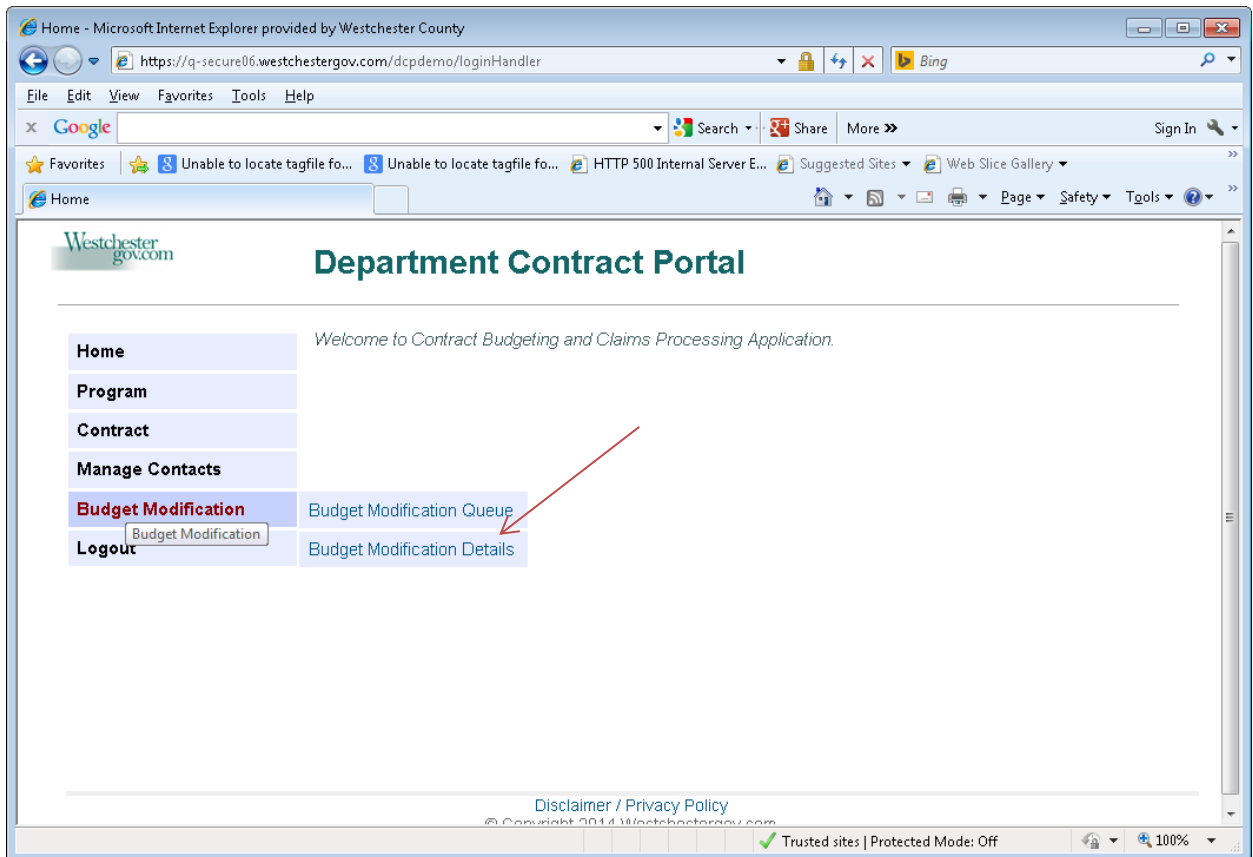
To view all Contracts select the relevant option from dropdown

Contract Status

Contract Name	Contract Number	Start Date	End Date
Child care	IT22331	05/01/2014	12/31/2016

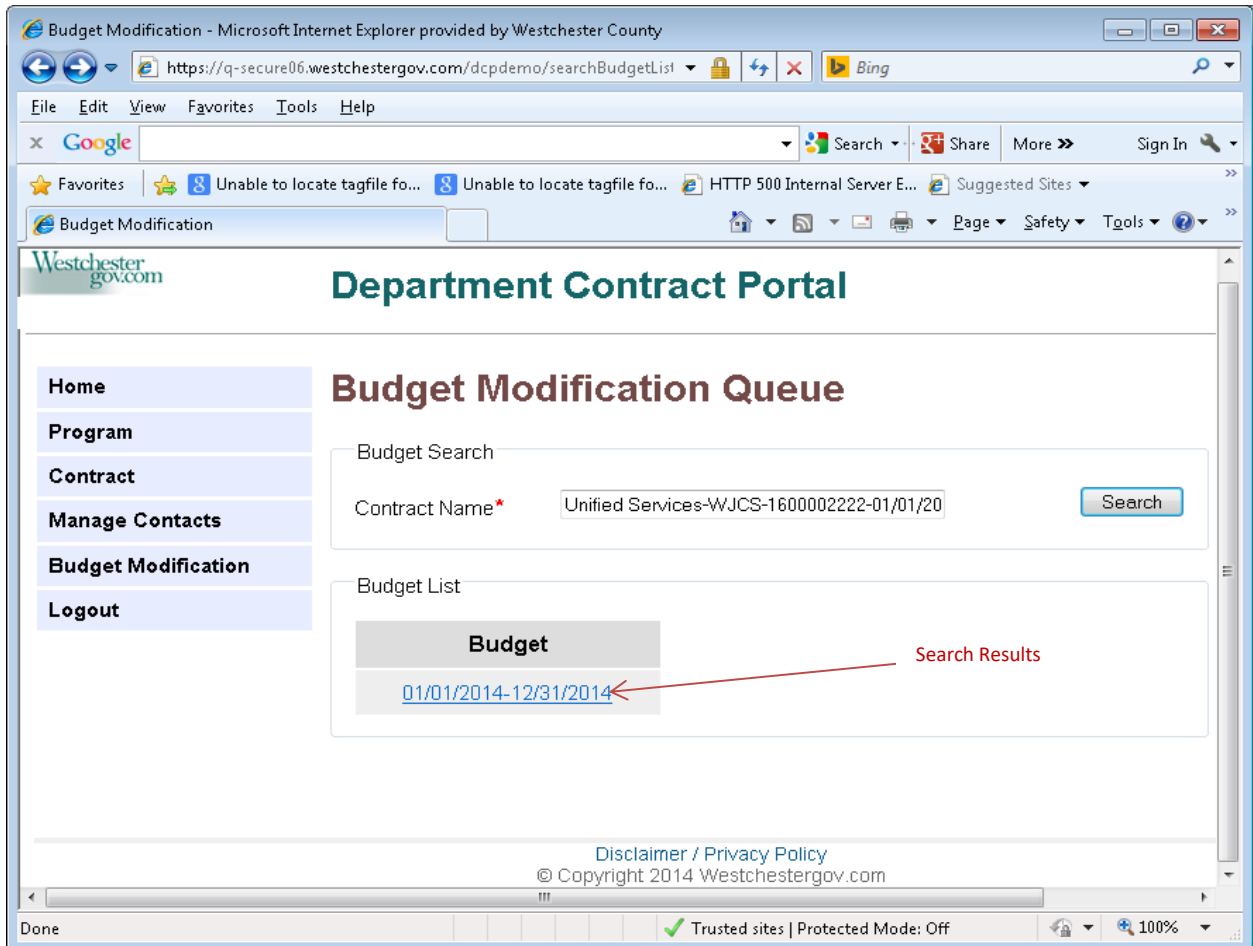
6. Budget Modification

Vendors can submit requests for budget modifications using the **Vendor Portal**. Department contacts will be notified via an automated email when a vendor submits a request for budget modifications. The **Budget Modification** item on the left side menu has **Budget Modification Queue** and **Budget Modification Details** as sub menu items.



6.1 Budget Modification Queue

Once a department gets an email notification about a new Budget Modification Request from a Vendor, you can use the **Budget Modification Queue** link to see the request. Type part of the Contract Name and click Search to see the Budget Modification Request for that contract.



When you click on the Budget Period in the search results, you will see the Budget Modification requests. After reviewing the Notes provided by the Vendor, you can approve or reject the request using the buttons below. An automated email will be send to Vendors notifying the status of their requests. Once requests are approved, vendors can start modifying the budget.

The screenshot shows a web browser window titled "Budget Modification - Microsoft Internet Explorer provided by Westchester County". The address bar shows the URL: <https://q-secure06.westchestergov.com/dcpdemo/budgetModRequestD>. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar shows a Google search bar, a Bing icon, and various utility icons like Home, Back, Forward, Stop, Reload, Print, and Page Setup. The page content features the Westchester.gov logo and the title "Department Contract Portal". A left-hand navigation menu lists: Home, Program, Contract, Manage Contacts, Budget Modification (highlighted), and Logout. The main content area is titled "Budget Modification" and contains a "Modification Request" form. The form has three fields: "Select Contract" with the value "Unified Services-WJCS", "Budget" with the value "01/01/2014-12/31/2014", and "Notes" with a large text area. Below the form are "Approve" and "Reject" buttons. At the bottom of the page, there is a footer with links for "Disclaimer / Privacy Policy" and "© Copyright 2014 Westchestergov.com". The browser's status bar at the bottom indicates "Trusted sites | Protected Mode: Off" and a zoom level of "100%".

Budget Modification - Microsoft Internet Explorer provided by Westchester County

<https://q-secure06.westchestergov.com/dcpdemo/budgetModRequestD>

File Edit View Favorites Tools Help

Google Search Share More Sign In

Favorites Unable to locate tagfile fo... Unable to locate tagfile fo... HTTP 500 Internal Server E... Suggested Sites

Budget Modification

Westchester.gov

Department Contract Portal

Budget Modification

Modification Request

Select Contract Unified Services-WJCS

Budget 01/01/2014-12/31/2014

Notes

Approve Reject

[Disclaimer / Privacy Policy](#)

© Copyright 2014 Westchestergov.com

Trusted sites | Protected Mode: Off 100%

6.2 Budget Modification Details

You can use the **Budget Modification Details** link to see budget changes made by a vendor. You can approve or request changes, similar to the original budget process. Once approved, the budget modification will be saved as a revision of the budget and the latest revision will be used for the payment process. Department users can see original budgets and revisions by going to the contract page in the portal.

The screenshot shows a web browser window titled "Modification Details - Microsoft Internet Explorer provided by Westchester County". The address bar shows the URL: <https://q-secure06.westchestergov.com/dcpdemo/showModificationDetails>. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar shows a Google search bar, a search button, a share button, and a "More" button. The browser's status bar at the bottom shows "Done", "Trusted sites | Protected Mode: Off", and a zoom level of 100%.

The application interface has a left sidebar with a menu containing the following items: **Program**, **Contract**, **Manage Contacts**, **Budget Modification** (highlighted), and **Logout**.

The main content area is titled "Budget Modification Details" and contains the following sections:

- Budget Modification Details**: This section contains two dropdown menus. The first is labeled "Select Contract" and has the value "Unified Services-WJCS-1600002222-01/01/2012-12/31/2016". The second is labeled "Select Budget" and has the value "01/01/2014-12/31/2014". Below these is a "Go" button.
- Budget Details**: This section contains two input fields. The first is labeled "Contract Number" and has the value "CMH2012045". The second is labeled "Period" and has the value "01/01/2014 - 12/31/2014". Below these is a text prompt "Please expand below items to enter budget details" and an "Expand All" button.
- Personnel**: This section is labeled "Personnel [+]" and is currently collapsed.
- Other than Personnel Service**: This section is labeled "Other than Personnel Service [+]" and is currently collapsed.
- Total Budget**: This section displays the value "161,580.90".

At the bottom of the main content area, there are two buttons: "Approve" and "Request For Change". Below the "Approve" button is the text "Click this button to Approve the Budget". Below the "Request For Change" button is the text "Click this button to Request For Change of Budget".

At the very bottom of the application, there are four buttons: "View Summary as PDF", "View Summary as Excel", "Detailed Budget Report", and "Budget Report as PDF".

7. Claims

Vendor submits claims for the budgets which need to be verified and approved for the payment. Vendors also can file for a supplemental claim if there are any discrepancies in the claim amounts in the approved claim. The menu item Payment Details has two sub menu items Claims Details and Supplemental Claim.



Department Contract Portal

Home	Welcome to Contract Budgeting and Claims Processing Application.
Program	
Contract	
Manage Users	
Budget Modification	
Payment Details	Claim Details
Performance Reporting	Supplemental claim
Logout	

7.1 Claim Details

The Claim Details screen allows **you** to view the claim details for a budget submitted by the vendor. You can search for the claim by selecting the contract, budget, the claim which you want to view and click on the button Go to display the claim details.



Department Contract Portal

Home	<h2>Claim Details</h2> <div>Claim Details</div> <div>Select Contract * <input type="text" value="--- Select ---"/></div> <div>Select Budget * <input type="text" value="--- Select ---"/></div> <div>Select Claim * <input type="text" value="--- Select ---"/></div> <div><input type="button" value="Go"/></div>
Program	
Contract	
Manage Users	
Budget Modification	
Payment Details	
Performance Reporting	
Logout	

You can reimburse an amount smaller than the requested amount in case of insufficient/wrong supporting documentation, this amount is entered in Allowed Amount column. Program and Contract users can only enter allowed amount and save the claim. Claim cannot be approved until the Finance/Admin users verify all the line items. You can check the verify all check box if you want to verify all the line items in a single shot. You can enter comments in the Department comments section.

Claim Details

Claim Status Program(s)

Please expand below items to enter budget details

Personnel [-]

Verify All Personnel Items ☐

Check this box to verify all personnel items

Verified	Item No.	Position/Title	Personnel Name	Budgeted Amount	Approved Claims Total?	Other Pending Claims Total?	Requested Amount?	Allowed Amount?	Available Balance
<input type="checkbox"/>	1	Chief Program Officer	D. Tukman	1,202.00	202.00	200.00	100.00		700
<input type="checkbox"/>	2	Manager Children's Services	L. Alfano	1,515.00	215.00	200.00	100.00		1,000
<input type="checkbox"/>	3	Children's Counselor	M. Rachel	19,085.00	285.00	0.00	100.00		18,700
<input type="checkbox"/>	Fringe Amount			4,796.00	0.00	0.00			4,796
Fringe%				22.00					
Total Salaries				21,802.00					
Total Salaries and Fringe				26,598.00	702.00	400.00	300.00	0.00	
% of Total Salaries for executive personnel				5.51					

Explanation for the amount fields shown in a claim screen are given below:

Approved Claims Total - Sum of all the approved amount for each line item of approved claims.

Other Pending Claims Total - Sum of other claims that are pending approval for each line item. For verified line items if allowed amount is different from requested amount, allowed amount is considered for the total.

Requested Amount - Amount requested by vendor for each line item for this claim.

Allowed Amount - Amount approved by county for each line item for this claim

Available Balance – Balance amount remaining to be claimed

Supporting documents uploaded by the vendor are available in the last section, you can download and view the file by clicking on the view button beside each document. Program or Contract users will not have the Verified column.

Vendor Explanation

Department Comments

Invoice Number

Is Original Invoice received ? ☐ Y ☒ N

☐ Reviewed by Program Monitor

☐ Reviewed by Contract Monitor

Supporting documents:

10/13/2015 14:58:38-51060612	view	10/13/2015 15:00:43-51060613	view	
10/13/2015 15:00:51-51060614	view	10/13/2015 15:02:13-51060615	view	Supporting Documents can be viewed in pdf format
10/13/2015 15:04:11-51060616	view			

Save

Click this button to save the Claim

Approve

Click this button to Submit the Claim

Request for Change

Claims Report as Excel

Claims Report as PDF

The claim details can be viewed in the form of excel and pdf reports

7.2 Supplemental Claim

The supplemental claims workflow is very similar to the Claims workflow. This module can be accessed using the **Supplemental Claim** option from the main menu. To create a supplemental claim select the contract, budget, and the claim that needs to be modified.

[Home](#)[Program](#)[Contract](#)[Manage Users](#)[Budget Modification](#)[Payment Details](#)[Performance Reporting](#)[Logout](#)

Welcome to Contract Budgeting and Claims Processing Application.

[Claim Details](#)[Supplemental claim](#)

Supplemental Claim also has an Allowed amount similar to the Claim Details which is known as Allowed Supplemental Amount, **you** can enter the supplemental allowed amount and verify the line items before approving similar to the claim details.

Department Contract Portal

Supplemental Claim Details

Claim Details

Select Contract * DV Civil Legal (MSP)-111700046675-01/01/2017-12/31/2017

Select Budget * 01/01/2017-12/31/2017

Select Claim * Claim1 - 1800053460 - 01/26/2018

Go

Claim Details

Supplemental
Claim Status

Submitted

Program(s)

Civil Legal

Please expand below items to enter budget details

Expand All

Personnel [-]

Verify All Personnel Items ☐ ?

Verified	Item No.	Position/Title	Personnel Name	Budgeted Amount	Approved Claims Total ?	Other Pending Claims Total ?	Allowed Amount ?	Requested Supplemental Amount	Allowed Supplemental Amount	Available Balance	Start Date	End Date
<input type="checkbox"/>	1	Managing Dire	J. Friedman	1,590.00	1,590.00	0.00	274.98	0.00		0.00	04/01/2017	06/30/2017
<input type="checkbox"/>	2	Managing Atto	P. Howard	12,051.00	11,901.00	0.00	3,000.00	150.00		150.00	04/01/2017	06/30/2017
<input type="checkbox"/>	3	Bilingual Legal	J. Hiser	3,660.00	3,515.87	0.00	907.76	143.95		144.13	04/01/2017	06/30/2017
<input type="checkbox"/>	Fringe Amount			4,209.00	4,209.00	0.00	1,044.53	0.00		0.00	04/01/2017	06/30/2017
	Fringe%			24.33								
	Total Salaries			17,301.00								
	Total Salaries and Fringe			21,510.00	21,215.87	0.00	5,227.27	293.95	0.00			
	% of Total Salaries for executive personnel			0.00								

Supplemental claim also has Supporting documents section where vendor users will upload the supporting documents and submit, **you** can view the document by clicking on View button.

The screenshot shows a web form for a supplemental claim. It includes two text areas at the top: 'Vendor Explanation' and 'Department Comments'. Below these is an 'Invoice Number' field. A radio button group for 'Is Original Invoice received?' has 'N' selected. There are two checkboxes: 'Reviewed by Program Monitor' and 'Reviewed by Contract Monitor'. A section titled 'Supporting documents:' lists five documents with their timestamps and IDs, each with a 'view' button. At the bottom, there are 'Save', 'Approve', and 'Request for Change' buttons. Below the 'Approve' button is a link to 'Click this button to Submit the Claim'. At the very bottom are two buttons: 'Claims Report as Excel' and 'Claims Report as PDF'.

Vendor Explanation

Department Comments

Invoice Number

Is Original Invoice received ? ☐ Y ☒ N

☐ Reviewed by Program Monitor

☐ Reviewed by Contract Monitor

Supporting documents:

10/13/2015 14:58:38-51060612	view	10/13/2015 15:00:43-51060613	view
10/13/2015 15:00:51-51060614	view	10/13/2015 15:02:13-51060615	view
10/13/2015 15:04:11-51060616	view		

Save Approve Request for Change

Click this button to save the Claim Click this button to Submit the Claim

Claims Report as Excel Claims Report as PDF

8. Performance Reporting

Performance reporting system collects data that would serve as a measure and evaluate services provided by vendors against the benchmarks provided by Departments. This information can be used for auditing purposes.

8.1 Performance Indicators

Performance Indicators screen allows **you** to define performance benchmarks for each program. Once you enter the program name and select a program in suggestion list, the information gets populated automatically if it is already saved in the system or you need to enter the performance indicators.

Home	Welcome to Contract Budgeting and Claims Processing Application.
Program	
Contract	
Manage Users	
Budget Modification	
Payment Details	
Performance Reporting	Performance Indicators
Logout	Associate Contract with Performance Indicators View Performance Reports

Home	Home > Add Performance Indicators
Program	Performance Indicators
Contract	Performance Indicators
Manage Users	
Budget Modification	
Payment Details	
Performance Reporting	
Logout	

Select Program*

Program ID:

Program Code:

Department Code

Description of the Program

Enter the Name of the program here

Performance Indicators -

Do you want to copy Performance Indicators from another Program?*

☒ Yes ☐ No

Select Yes if you want to use same Performance Indicators from another program

Performance indicators can be copied from another program by Selecting Yes for the question to copy forward. If you decide not to copy over then select No and continue to enter Category Name and respective performance indicators under it. For an additional Performance Indicator click on the Add Performance Indicator button which allows you to enter data for the Performance Indicator. If you need to Add a new category click on Add Category button and enter the new Category name and respective Performance Indicators.

Performance Indicators -

Do you want to copy Performance Indicators from another Program? *
☐ Yes ☒ No

Category :

Category Name*

Performance Indicator

Describe Performance Indicator*

Frequency *
☐ Quarterly ☐ Monthly ☐ Annual

Select Information Type*

--- Select ---

Comments

Add Performance Indicator

Add Category

Save

[Disclaimer / Privacy Policy](#)
© Copyright 2016 Westchestergov.com

8.2 Associate Contract with Performance Indicators

Performance Indicators of a program can be associated to the respective contracts in this screen. Enter the program name and select the program from the suggestion list which appears once you start entering the program name, then select the contract for which the performance indicators need to be associated with.

28

October 27, 2014

File Edit View Favorites Tools Help

Westchester
gov.com

Department Contract Portal

Welcome to Contract Budgeting and Claims Processing Application.

Home
Program
Contract
Manage Users
Budget Modification
Payment Details
Performance Reporting
Logout

Performance Indicators
Associate Contract with Performance Indicators
View Performance Reports

Enter program name and select the contract from the drop down to which the performance indicators need to be associated with. You can select the due date for monthly and quarterly reports. You can save the form by clicking the button Save or Submit it to the Vendor by clicking Submit button. Once submitted vendors can create reports and submit it back to the department.

Westchester
gov.com

Department Contract Portal

Home > Associate Contract PI

Associate Contract with Performance Indicators

Performance Indicators

Select Program testr

Select Contract testloft-161700054994-07/01/2017-07/31/2017

Due date for monthly report is 5 of every month

Due date for quarterly report is 10 days after end of the quarter

Performance Indicators

Select All Performance Indicators

Category : New Children

☒ Performance Indicator

Describe Performance Indicator

Number of children new to program

Frequency

Information Type

et

ments

Monthly
Annual
Quarterly

Numbers Only

200

Save
Submit

Check this check box to associate the performance indicator to the contract

8.3 View Performance Reports

Performance Reports submitted by the vendors can be viewed in this screen by selecting the appropriate contract and the frequency of the report. Click on the Search button to display all the reports. You can view the details of the report by clicking on the report period which appears blue in color and underlined as shown in the image below. You can also download the report in Excel or Pdf format by clicking on the buttons as shown in the image below

Westchester
gov.com

Department Contract Portal

Home > View Performance Reports

View Performance Reports

Performance Reports

Select Contract: 111500018434 - Children's Counseling - 01/C

Frequency: Monthly

Search

Reports	Submitted On	Status
<u>March 2017</u>	04-23-2017 04:16:28 PM	Submitted

Click on the Report Period to view details

Program: Non-Residential Domestic Violence

Performance Indicators	Target	Achieved	% Achieved
Group		6	?
Number of children in the Program		90	?
Individual		30	?
Other		60	?
Number of children who participated in the Program	30	75	250
Number of hours the children were counseled for		130	?

Department Comments

Vendor Explanation

Save Request Change Approve

Performance Report as Excel Performance Report as PDF

Click on these buttons to get Reports downloaded in respective file formats

9. Support

If you encounter any issues or have any questions, please contact the Westchester County Help-Desk at 914-995-5513 or by sending an email to DoITHelpDesk@westchestergov.com.