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Introduction to HHS Accelerator and Financials

The Health and Human Services (HHS) Accelerator System is the City’s online system to simplify and speed the contract process for health and human services providers that deliver services directly to clients and communities. Through a collaborative process with providers, redundant paper-based requirements were removed, processes reengineered, and contract documents standardized – freeing up resources for mission-focused activities.

Agencies now release all Health and Human Services Request for Proposals (RFP) through the HHS Accelerator System. Prequalified providers approved for relevant Services are “Eligible to Propose” and can submit proposals after procurements are released.

The HHS Accelerator System also has the functionality to manage financials electronically. Providers can manage budgets, invoices and payments in the system. HHS Accelerator Financials enables a paperless process and facilitates increased accuracy in accounting.

The City of New York is phasing in the use of this module and participating organizations will receive notification when it is time to use HHS Accelerator Financials.

HHS Accelerator Financials standardizes financials for health and human services contracts across the eleven participating Agencies. The system provides:

- A standard budget template
- A common interface for City Agencies and Providers to conduct budget transactions
- Agencies use the same process to configure/modify/amend budgets, invoices and payments
- A more holistic picture of contract data and financials for HHS Accelerator Agencies

Financials on the Provider Homepage

After logging in, the first page that you will encounter is the Provider Homepage.

Below the main tabs navigation icons are dashboards that give an overview of your Organization’s HHS Accelerator Application status, Filing status, Procurements, Financials, Documents Shared with your Organization and NYC.ID Account Maintenance. From the homepage, your organizations can use the financial links on the dashboard to access key financial functions, or can use the main Financials tab at the top of the page.

When you log into the HHS Accelerator System, at first it will appear as if procurement and financial statistics are unavailable. In order to see the tasks and statistics, you must press the refresh icon, located on the solid blue band.
a. Select the “Financials” tab to access the HHS Accelerator Financials.
b. Budgets pending submission for your organization are listed.
c. Budgets returned for revision that your organization needs to address.
d. Modifications and Updates pending submission by your organization.
e. Modifications and Updates returned for revision by the funding Agency.
f. Invoices pending submission by your organization.
g. Invoices returned for revisions by an Agency.
h. Active budgets for your organization are listed.
i. Budgets pending approval by the funding Agency.
j. Modifications and Updates pending approval by the funding Agency.
k. Invoices pending approval by the funding Agency.
l. Contracts pending registration for your organization are listed.

Key financial functions are listed in two columns on the homepage. The left hand column highlights in red financial transactions your organization must take action on. The right column are key financial functions your organization can monitor.
Monitoring the Status of an Amendment

View your Organization’s Amendment List

The Amendment List displays your organization’s Health and Human Services contract amendments that have been generated in the system. The Amendment List is located in the Financials section of the HHS Accelerator System. To access the Amendment List, click the Financials tab, then click the Amendment List tab.

A contract amendment occurs when the Agency initiates a contract value change in the system.

- Click on the Amendment List tab to access the Amendment List.
- Click on the Filter Amendment button to change which amendments are displayed.
- Number of amendments displayed based on applied filters.
- Procurement/Contract Title is listed.
- Funding Agency.
- Amendment Title is listed.
- Contract Number (CT#) is listed.
- Amendment Value (s) is listed.
- Date of Last Update is listed.
- The status of the amendment is displayed.
- Action column provides menu of possible actions to take. For the amendment, you can view the corresponding contract and budget.
**Stages of a Contract Amendment**

All contract amendments with a status of Pending Configuration, Pending CoF (Certification of Funds), Pending Submission, Pending Approval, Pending Registration, and Registered, are visible on the Amendment List. Contract amendments that are suspended or cancelled do not appear on the amendment list by default, but your organization can access them by using the “Filter Amendments” feature. The following descriptions define the life cycle of amendments in the system.

<table>
<thead>
<tr>
<th>Status Type</th>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Amendment Status</td>
<td>Pending Configuration</td>
<td>The Agency is configuring the contract amendment.</td>
</tr>
<tr>
<td></td>
<td>Pending CoF</td>
<td>The Agency staff is verifying the contract amendment configuration.</td>
</tr>
<tr>
<td></td>
<td>Pending Registration</td>
<td>The Agency has amended the contract. “Pending Amendment” flag will be visible on the Contract list.</td>
</tr>
<tr>
<td></td>
<td>Registered</td>
<td>The contract has been registered with updated details. Invoicing and payments can begin.</td>
</tr>
<tr>
<td></td>
<td>Suspended</td>
<td>The Agency has suspended the contract amendment.</td>
</tr>
<tr>
<td></td>
<td>Cancelled</td>
<td>The Agency has cancelled the contract amendment.</td>
</tr>
</tbody>
</table>
Filter Amendments
Filtering allows you to target your search and quickly modify contract amendments displayed on the Amendment List. After you click the “Filter Amendments” button, the filter menu displays with a number of options for modifying displayed amendments. To adjust your filtered options, you must uncheck relevant boxes.

- **Amendment Value From ($)** allows your organization to filter for contract amendments that fall in a specified range.
- **Status** indicates the current status of the amendments. Your organization can select any status. Suspended and Cancelled status can only be selected from the filter options section.
Contract Amendments

Positive Contract Amendment

The Agency initiates the positive Amendment (contract value change) in the system and your organization would then need to adjust the budget accordingly to match the new contract value.

Your organization’s Financial Level 2 system users will receive an email notification of a positive budget amendment. Your organization will make the adjustment to the budget and submit the Amended budget to the Agency. The Agency will then review and either return or approve the revised Budget.

To view a contract amendment, review the steps below:

1. Click on the “Refresh” icon in the financials section of the homepage.
2. Click on the number hyperlink for “Budgets Pending Submission.”

When a contract is amended by the Agency, your organization must revise the budget.
The contract that has been amended will have an amendment symbol next to it.

3. Click the blue “Procurement/Contract Title” hyperlink for the contract that has been amended.

4. Next, click on the first blue bar to expand the “Budget Summary” section.
In this example, the contract is increased/amended $100,000 by the Agency. The $100,000 must be allocated in the Budget and resubmitted to the Agency.

In this example, the funding is being allocated in the Personnel Services tab.

5. Click “Personnel Services.”
The default view is the "Summary View" tab, this is where Amendment Amounts can be entered. The "Detail View" tab is locked and cannot be edited. All staffing changes for Amendment Budgets are made at the summary level.

6. Click on the "+" symbol next to the Hourly Positions Total row.

7. Click "+Add."

8. Select a "Position Title" from the drop-down menu.

9. Enter the "Amendment # Positions."

10. Enter "Amendment Amount."

11. Click "Save."
12. Click on the “+” symbol next to Salaried Positions Total row.

13. Click “+Add.”

14. Select the “Position Title” from the drop-down menu.

15. Enter the “Amendment # Position.”

16. Enter “Amendment Amount.”

17. Click “Save.”

Repeat steps as needed for other tabs to match Total Amendment Budget.
18. Click the "Budget Summary" tab.

From the Budget Summary tab, confirm that the Amendment Amount matches the budget amount in the blue bar.

19. Click "Submit."

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**Program Budget**

- Total City Funded Budget: $1,000,000.00
- Total Program Income (Excluding from City Funded Budget, Not Invoiced): $25,000.00
- Total Program Budget: $1,025,000.00

**Services Site Information**

- Site Name: Program Office
  - Address 1: 4 Myron St, New York
  - Address 2: Brooklyn, NY 11201
  - Action: [ ] need to add
Once a positive Amended budget is approved, and the new contract value has been registered, the Budget Value ($) on the contract list will adjust accordingly.

20. Select the box to indicate that you agree to submit this Budget Amendment to the Agency for review.

21. Enter your “User Name” and “Password” as your e-signature.

22. Click “Yes, submit this Amendment.”

A green message bar will confirm that your Contract Budget Amendment was successfully submitted and will be reviewed by the Agency.
Negative Contract Amendment

If the Agency initiates a negative Amendment to the contract, your organization would need to adjust the budget to match the new contract value.

Your organization’s Financials Level 2 users will receive an email notification of a negative budget amendment. Your organization will make the adjustment to the budget and submit the Amended budget to the Agency. The Agency would then review and return or approve the revised Budget.

To view a negative contract amendment, review the steps below:

1. Click on the “Refresh” icon in the financials section of the homepage.
2. Click on the number hyperlink for “Budgets pending submission.”

When a contract is amended by the Agency the budget must be revised.
The contract that has been amended will have an amendment symbol next to it.

3. Click the blue “Procurement/Contract Title” hyperlink for the contract that has been amended.

4. Click on the first blue bar to expand the “Budget Summary” section.

The Amendment Amount for this contract is negative $10,000.
The budget must be decreased by $10,000 and resubmitted to the Agency.

In this example, we’ll adjust rate and rent to account for the decrease.

5. Click the “Rate” tab.

6. Click on the “+” symbol next to the Unit Description row.
7. Click the Unit Description detail row, and then click “Edit.”

8. Enter the “Amendment # Units.”

9. Enter “Amendment Amount.”

The Amendment Amount must be a negative number. It reflects how much this item will be decreased.

10. Click “Save.”

11. Click the “Rent” tab.

12. Click on the “+” symbol next to the Rent row.
13. Click the Rent Description detail row, and then click “Edit.”

14. Enter “Amendment Amount.”

The Amendment Amount must be a negative number. It reflects how much this line item will be decreased.

15. Click “Save.”

16. Click the “Budget Summary” tab.

From the Budget Summary tab, confirm that the Amendment Amount matches the value in the blue bar.

17. Click “Submit.”
18. Select the box to indicate that you agree to submit this Budget Amendment to the Agency for review.

19. Enter your “User Name” and “Password” as your signature.

20. Click “Yes, submit this Amendment” at the bottom of the screen.

Once a negative Amended budget is approved, the Budget Value ($) on the contract list will adjust accordingly.