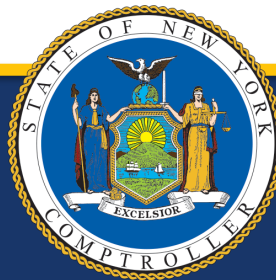


**Office of Operations'**  
**2024 Virtual Fall Conference**

**Vendor Management, Vendor Portal,  
1099 Processing and  
Vendor Q&A**

Anne Hall, Suzanne Trzcinski, Jill Donnelly, Alex Waldron,  
Rebecca Backstrom, Katie Germain, Maria Menagias, Aidan Klein,  
Mike Clarke (Bureau of State Expenditures) and  
Emily Snyder (Statewide Financial System)



New York State Comptroller  
**THOMAS P. DINAPOLI**

# Road Map

- Vendor Management
- Vendor Registration
- Components of the Vendor File
- Statewide Financial System Vendor Portal
- 1099 Reporting Process
- Q & A



# What Is the Vendor File?

- The Vendor File is a centralized repository in the Statewide Financial System (SFS) designed to maintain timely and reliable information on all vendors registered to do business with New York State
- Vendors can be entities which:
  - Provide/supply goods or services to the State
  - Have an ongoing business relationship with the State
  - Receive a one-time payment
  - Receive a form of benefit or award payment from the State
  - Are individuals or entities (e.g., businesses, municipalities)
- The file identifies vendors by a New York State assigned ten-digit vendor identification number (Vendor ID)



# Who Is Responsible for Vendor Management?

- New York State Agencies
- Office of General Services (OGS)
- Business Services Center (BSC)
- Office of the State Comptroller (OSC) Vendor Management Unit (VMU)
- SFS Helpdesk
- Vendors



# What Is the State Agency's Role?

- Use the *Vendor Add Page* in the SFS to directly register individuals or entities in the Vendor File
- Resolve various issues which may be encountered during the registration process
- Create contracts, purchase requisitions, purchase orders, and in general, processes voucher payments in the SFS with vendors that have been successfully registered in the Vendor File and have valid New York State Vendor IDs



# What Is the State Agency's Role?

- Ensure vendors are registered with an appropriate **Primary Contact**
- Instruct vendors on the importance of maintaining up-to-date information in the Vendor Portal
- Advise vendors that VMU may reach out directly to discuss and validate requests for updates to the vendor's information in SFS



# What Is VMU's Role?

- Complete the vendor add process and manually add unique vendors, such as:
  - Foreign vendors
  - Single payment vendors
  - Special use vendors
- Validate and approve vendor-initiated updates for payment addresses, banking, contact and legal name changes
- Issue annual 1099 income reporting statements
- Work directly with state agencies, vendors and the SFS Help Desk on a variety of vendor inquiries and issues



# What Is the SFS Help Desk's Role?

- Perform password resets for vendor accounts
- Assist vendors with obtaining Vendor Portal access
- Assist state agencies with vendor related questions



# What Is the Vendor's Role?

- Review and maintain vendor information through the Vendor Portal
- Review procurement and payment information through the Vendor Portal
- Delegate Vendor Portal access to other users, such as Administrator or View Only roles
- Maintain small business certification, if applicable



# Vendor Registration



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# Vendor Add Request

**Vendor Information**

\*Vendor Name1:  Vendor Name should denote 'Vendor Legal Name' as shown on W-9.

Vendor Name2:  Name fields are max 40 characters in length. Name2 field should be used only when Name1 exceeds 40 characters in length.

Address ID: 1 Description: Remit To

Country: USA

\*Address Line 1:

Address Line 2:

Address Line 3:

\*City:  County:

\*State:  \*Postal Code:

1099 Reportable:

\*Classification:  Will this Supplier receive Purchase Orders:

\*TIN:

\*Withholding Type: 1099N  \*Withholding Class: 01  Non-Employee Compensation

\*Contact Name:  Note: Contact Email (required) and Phone should be for the Contact Name. This information is critical to facilitate future vendor communication.

\*Contact Email Id:

Contact Phone:

- Legal business name
- Payment address
- Purchase order address
- Classification (identifies 1099 defaults)
- Primary Contact name, email and phone number

**Vendor PO Information**

Address ID: 2 Description: Ordering

Country: USA

\*Address Line 1:

Address Line 2:

Address Line 3:

\*City:  County:

\*State:  \*Postal Code:

\*Email Address for POs:

Note: Please change address if different than Address ID 1 above. Enter PO Email address where purchase orders will be sent.

**Requesting Agency Information**

\*Requesting Agency:

\*Agency Contact Name:

\*Agency Contact Email:

Save

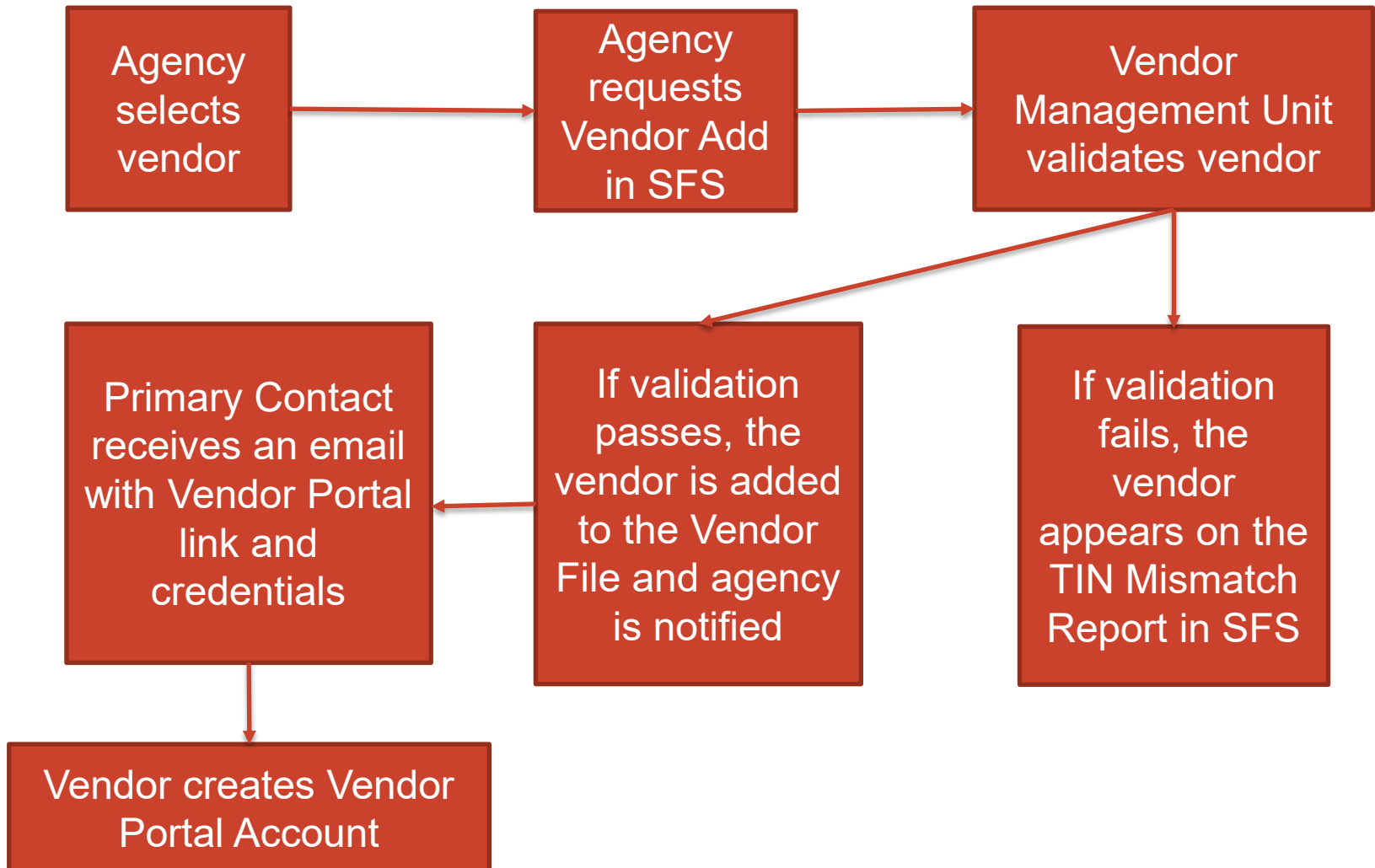
Notify

Add



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# Vendor Registration Overview

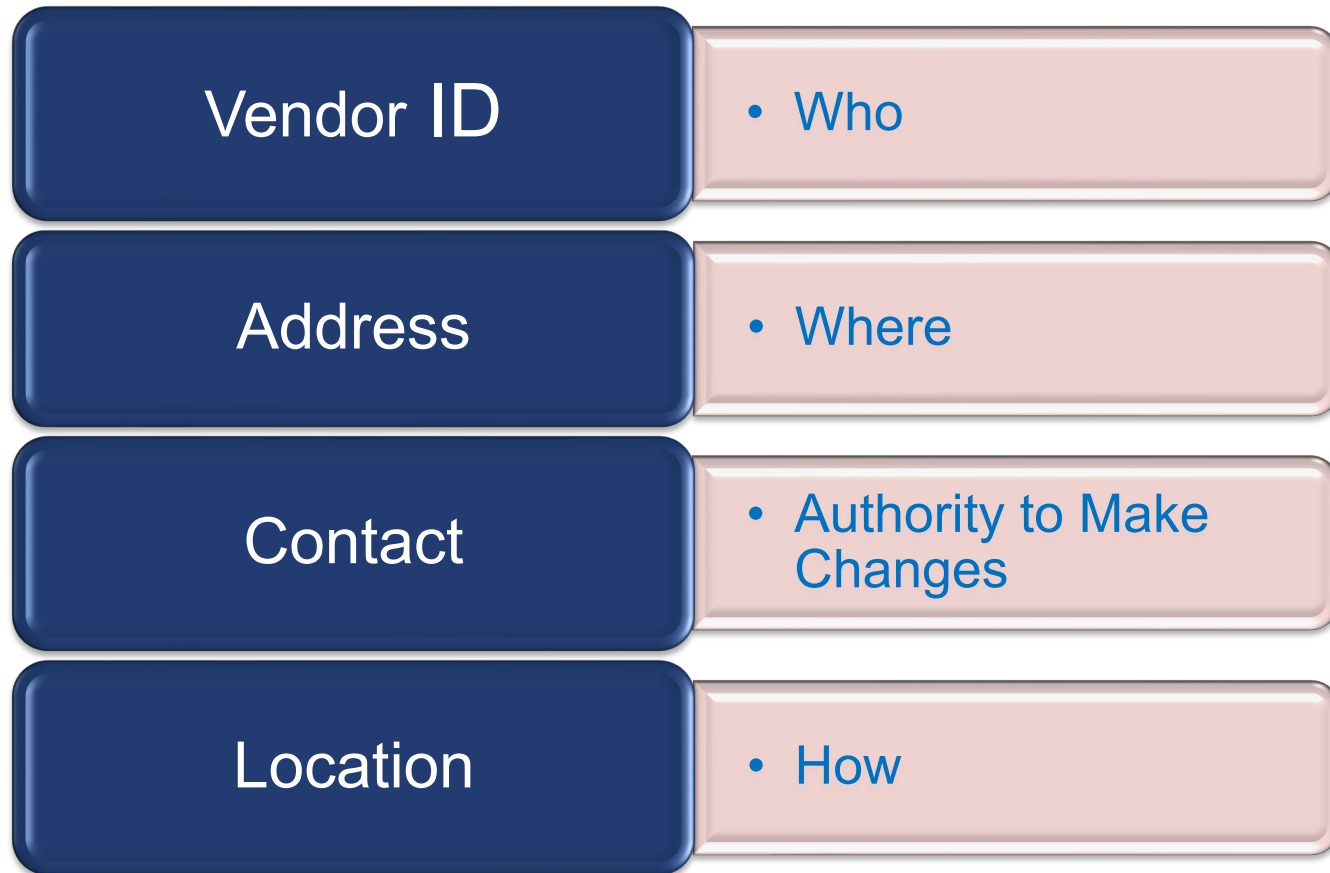


# Components of the Vendor File



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# Components of the Vendor File



# What Addresses Are in the Vendor File?

- Default payment address assigned during vendor registration
- Vendor can add additional addresses (e.g., ordering, physical, payment) through the Vendor Portal
- Vendor can update existing addresses (e.g., ordering, physical, payment) through the Vendor Portal

GFO: [X.4.B Addresses](#)



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# Who Is the Primary Contact?

- Primary Contact is identified by the vendor and assigned during vendor registration
- Primary Contact must be authorized to make legal and financial decisions on behalf of the vendor
- Primary Contact is the administrator of the Vendor Portal account and can:
  - Give access to additional users
  - Update addresses and contacts
  - Sign up to receive electronic payments

GFO: [X.4.C Contacts](#)



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# What if the Primary Contact Is Outdated?

## Primary Contact has access to Vendor Portal

- Log in and submit a primary contact update
- Routed to VMU for approval

## Primary Contact no longer can access the Vendor Portal

- Contact the SFS Helpdesk at (855) 233-8363 or [Helpdesk@sfs.ny.gov](mailto:Helpdesk@sfs.ny.gov)



# What Are Vendor Locations?

- Defines the vendor's business rules on how they do business with the State. This includes:
  - Email address(es) to receive purchase orders
  - Bank account(s) to receive electronic payments
  - Payment terms (e.g., 2/10 Net 30)
- **DOES NOT** equate to a payment method only (e.g., Check vs. ACH)
- Vendors can have an unlimited number of Locations
- Updated through the Payment Profile tab in the Vendor Portal



# What Are Vendor Locations?

- Vendors can set up Locations to mirror its corporate structure or its business relationship with the State. For example, the vendor can set up Locations by:
  - Region (e.g., Albany, Buffalo)
  - Business relationship (e.g., goods, services)
  - Contracts

*GFO: [X.4.D Location](#) and [XII.5.D Selecting the Appropriate Location](#)*



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# Example of Vendor Locations

## Vendor 1 Example – Four Locations:

Location Name	Location Description	Ordering Email	Payment Method	Payment Address
MAINCHECK	MAINCHECK	RochesterNYS@example.com	Check	PO Box 12345 Philadelphia, PA.
MAINEPAY	Green Cleaning PC66835	RochesterNYS@example.com	ACH	Bank Account 1
LOC02	Misc. Office Supplies PC67296	RochesterNYS@example.com	ACH	Bank Account 1
LOC03	Technology Contracts	solomon.massey@example.com	ACH	Bank Account 2



# What Location Do I Choose?

- State agencies should work with the vendor to select the appropriate Location
- Vendor has an ACH Location and does not want to receive checks
- Electronic payment requirements can be part of contract or purchase order agreements
  - e.g., OGS centralized contract, agency contract, purchase order terms and conditions



# Statewide Financial System Vendor Portal



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# Vendor Portal

- Provide vendors who do business with the State the ability to manage their billing and payment information in SFS
- Vendors can review:
  - Purchase Orders
  - Receipt Information
  - Status of Invoices
  - Payment Information
- Primary Contact can add additional roles:
  - Administrators
  - Guests
- Primary Contact is responsible for maintaining delegate(s) access



# What Are the Components of the Vendor Portal?

- Maintain information by submitting change requests for:
  - Legal name
  - Address updates for check remittance and purchase orders
  - Email address for PO dispatch
  - Contacts including Primary Contact and non-primary contacts
  - Locations including bank account information and payment terms



# VMU Vendor Outreach

- Supplier Change Requests and Primary Contact approvals may require outreach to the vendor
- Approved Primary Contact receives a welcome email to the Vendor Portal
- Approved Supplier Change Requests are updated in the Vendor File and the Primary Contact receives notification of the change



# Vendor Portal Access

## Access SFS

Home About SFS WCB Customers Vendors Procurement

### New York Statewide Financial System

**WCB CUSTOMERS**  
Manage your account, invoices and online payments for NYS Workers' Compensation Board.  
WCB CUSTOMER PORTAL LOGIN

**VENDORS**  
Submit invoices, look-up payments and update your contact information.  
VENDOR PORTAL LOGIN

**AGENCIES**  
Access New York State's financial and accounting system.  
AGENCY PORTAL LOGIN

Contact the SFS Help Desk for more information or system support.  
HELPOESK@SFS.NY.GOV




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# Information Available for Vendors

**SFS**

Vendor Portal ▾

### Welcome NYS Vendors




Welcome to New York State's Vendor Portal.


Thank you for doing business with New York State. As a vendor who provides goods and services to NYS agencies, you may transact business online through the Statewide Financial System's Vendor Portal. From this Portal, you can submit invoices, look up payments, and update your contact information online.

[Learn more about the benefits of the Vendor Portal](#)

### Sign in to the Vendor Portal

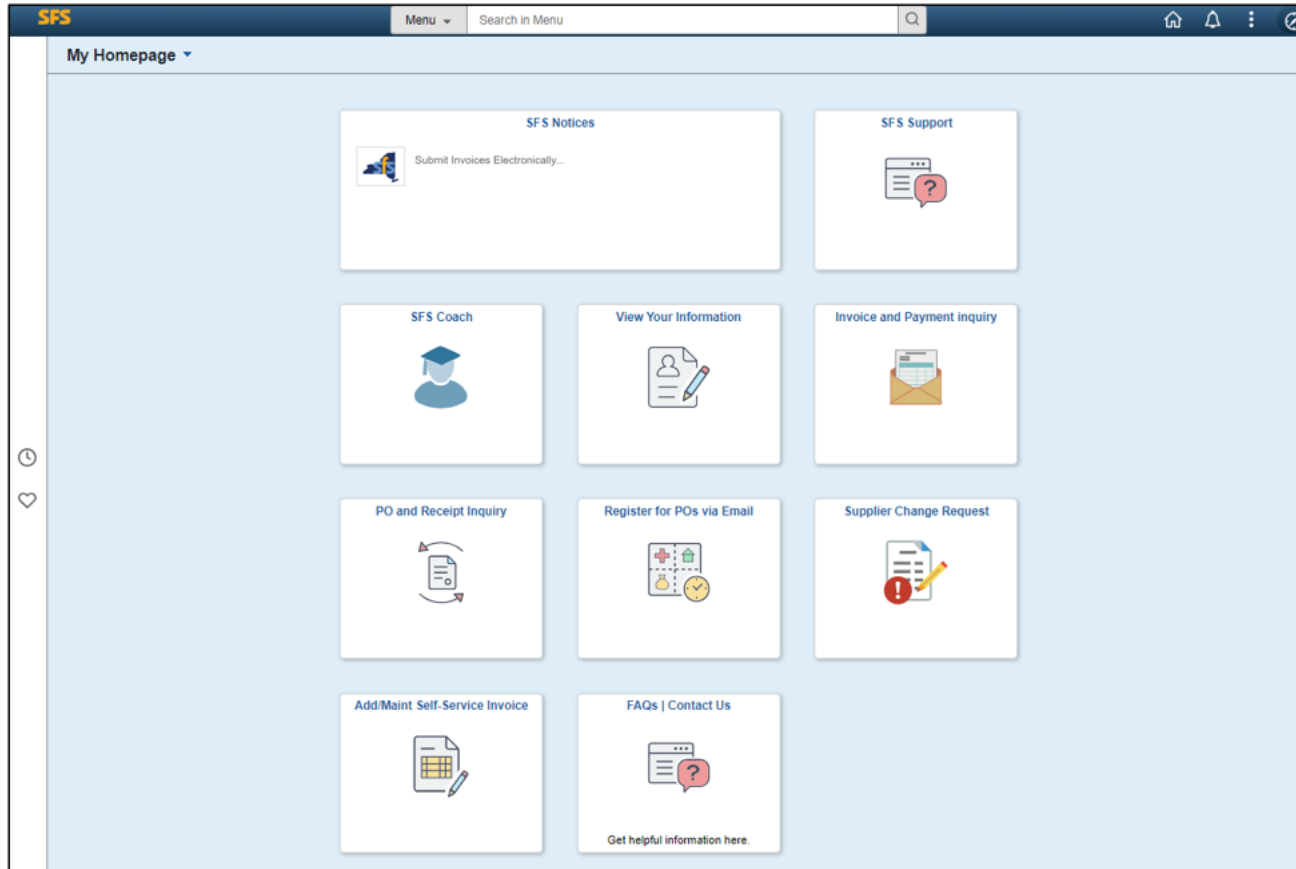


### Vendor Announcements





# Vendor Portal Homepage



# Managing Orders



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# PO Dispatch to Vendors

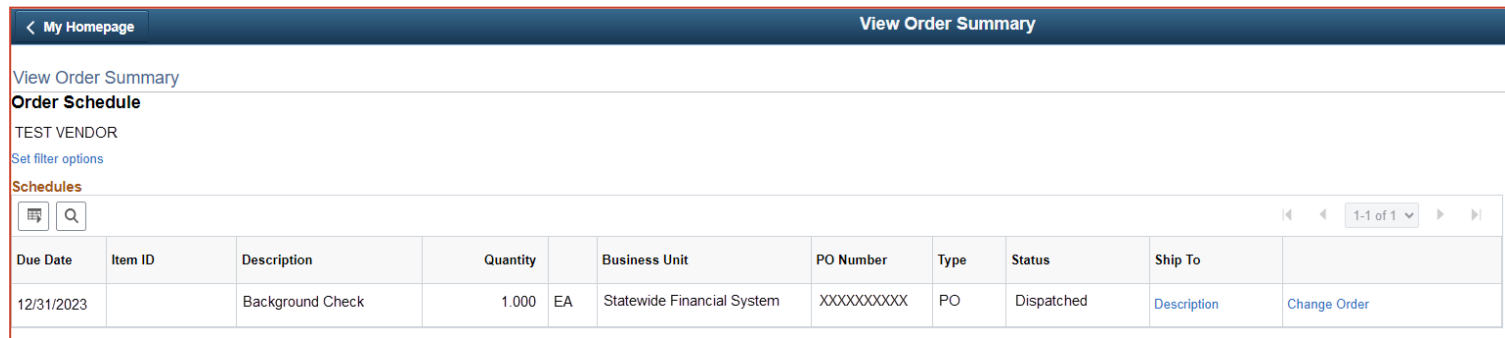
- A Purchase Order (PO) is used to communicate all necessary order information to a vendor and confirm that the delivery and purchase of a good or service has been authorized
  - Proper PO setup and use in SFS is important as it provides agencies with the ability to effectively communicate with vendors and streamline the procurement-to-payment process
- Once a PO is approved and successfully budget checked, the PO is dispatched via email to vendors
  - Email is the State’s primary method of dispatch to vendors
- Vendors can enroll and manage their email addresses in the Vendor Portal
  - Vendors who receive a PO through the “One Time Only Email Dispatch” functionality are automatically enrolled in email PO dispatch

GFO: [XI.A.7 Authorization and Dispatch](#)



# Review Order Summary Information

- Vendors can define their search criteria by PO Status, Date, Item ID, and/or Supplier Item ID
- Vendors can export results to sort and filter as needed



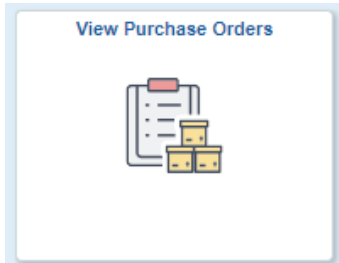
The screenshot shows a web interface for 'View Order Summary'. At the top, there is a navigation bar with a back arrow and 'My Homepage' on the left, and 'View Order Summary' on the right. Below this, the page title 'View Order Summary' is displayed. The main content area is titled 'Order Schedule' and includes the text 'TEST VENDOR' and a link 'Set filter options'. A section labeled 'Schedules' contains a table with one row of data. The table has columns for Due Date, Item ID, Description, Quantity, Business Unit, PO Number, Type, Status, and Ship To. The data row shows a due date of 12/31/2023, a description of 'Background Check', a quantity of 1.000, and a status of 'Dispatched'. There are also links for 'Description' and 'Change Order' in the 'Ship To' column.

Due Date	Item ID	Description	Quantity	Business Unit	PO Number	Type	Status	Ship To
12/31/2023		Background Check	1.000	EA	Statewide Financial System	XXXXXXXXXX	PO	Dispatched

The View Order Summary page is available to vendors using the following navigation:  
NavBar > Menu > Manage Orders > View Order Summary



# View PCard Information



Vendors with the applicable PCard view access role in SFS can click into a Purchase Order to view PO Details, including PCard information such as Credit Card Number, Card Type, and Expiration Date.

**Review Purchase Orders**

Purchase Orders

**Purchase Order List**

TEST VENDOR

POs Returned 1

Default View for Change Orders All lines

Set filter options

Orders Per Page ALL First Last

**Purchase Order List**

1-1 of 1 | View All

**PO Details** Header Details

Purchase Order	Status	Last Dispatched Date/Time	Lines	Total Amount	Acknowledge Status				
<input type="checkbox"/> XXXXXX	Compl	08/10/2023 8:42:28AM	2	400.74	USD	Acknowledgement Status	<a href="#">View ASNs</a>	<a href="#">View PDF</a>	<a href="#">View Contract</a>

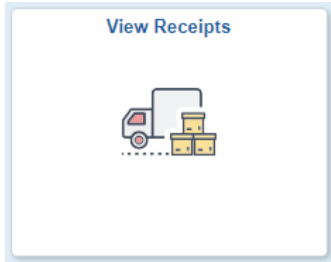
Select All  Clear All

[View Selected POs in Downloadable Format](#)

The View PDF button allows you to generate a printable version of the purchase order. Using the Default View for Change Orders options you can control if the report generated shows all lines or only the latest changes. (This same option is also used to control the online view of the PO.)



# View Receipts



Vendors can check if a State Agency they do business with has entered a receipt for the goods or services the vendor provided.

PO and Receipt Inquiry View Receipts

Review Receipts

**Receipt Lines**

TEST VENDOR

[Set filter options](#)

**Receipt Lines**

☰ 🔍 1-1 of 1 | View All

Receipt Number	Received Date	PO Business Unit	PO Number	Ship No	Item ID	Description	Received	UOM	Status
000000000	08/07/2023	SFS01	XXXXXXXX			HP LaserJet 550 Sheet Paper Tray SKU# 0000	1.0000	EA	Fully Received



# Managing Invoices and Payments



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# Electronic Payments (ACH)

- It is recommended that all vendors who do business with NYS and have a Purchase Order established to sign up for electronic payments
- Electronic payments ensure that once the invoice is processed, funds are transferred to the vendor's account quickly and securely
- Vendors can sign up for electronic payments directly in the Vendor Portal



# Electronic Invoicing (eInvoicing)

- Electronic invoicing (eInvoicing) allows vendors to bill State Agencies directly with paperless invoices (eInvoices) using SFS
  - eInvoices are electronic requests for payment submitted by the vendor
- Agencies receive eInvoices immediately upon vendor submission, streamlining the invoice to payment process
- Vendors can view and track eInvoices at all steps in invoice processing

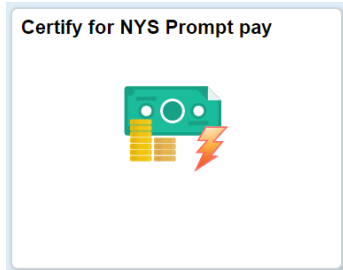


# Electronic Invoicing (eInvoicing)

- An eInvoice is not:
  - An invoice emailed to the agency
  - An invoice entered by a State agency into the eSettlements module
- Vendors can refer to the [eInvoicing Options Available for Vendors](#) reference guide for more information on how to use the different eInvoicing options



# Self-Certify as a NYS Prompt Pay Small Business



If qualified, vendors can self-certify and may be eligible for prompt payment interest, if no payment is sent within 15 days from invoices submitted electronically\*.

< eSupplier Search **Certify for NYS Prompt Pay**

**Self-certify as a NYS Prompt Pay Small Business**

Supplier 1234567890      Supplier Name COMPANY NAME, LLC

By checking the box below indicating that the Vendor is a Small Business for purposes of the Prompt Payment Law ([State Finance Law § 179-f](#)), I certify as follows:

- 1) I am the individual who is registered to this NYS Statewide Financial System (SFS) User ID ("Vendor Representative").
- 2) I am authorized to act on behalf of the Vendor.
- 3) I am knowledgeable about the Vendor's business, operations, and employees.
- 4) The Vendor is a Small Business pursuant to [State Finance Law § 179-f](#), meaning that the Vendor-

User ID **CompanyName** [Print Small Business Terms and Conditions](#)

The Vendor is a Small Business pursuant to [State Finance Law § 179-f](#)

If the Vendor is not a Small Business, leave the box unchecked.

OK Cancel

*\*Email does not qualify as electronic.*



# Submit Invoices Online

Add/Maint Self-Service Invoice



Vendors can submit their invoices directly in SFS with Self-Service Invoicing.

Self-Service Invoice Invoice Entry

Create Invoice  
Invoice Entry

Invoice Header Information

\*Supplier SetID: SHARE  
\*Supplier: COMPANY NAME, LLC  
Location: Misc. Office Supplies PC12345  
DEPT ROC PO BOX 000000  
BOSTON, MA 02241 USA  
\*Invoice ID:  
Invoice Date: 02/20/2020  
VAT Treatment Group:  
Delivery/Service Date:  
Voucher ID: NEXT  
\*Buyer:  
Currency: USD US Dollar

Indexer ID  
Receiving Required

Add a New Invoice Line Copy from a Purchase Order Copy from a Packing Slip

Invoice Details

Item ID	Description	Quantity	UOM	Unit Price	*Merchandise Amt	Currency	Tax
						USD	

Settlement Information

Payment Terms: Total Amount: 0.00 USD  
Sales Tax Amount: 0.00 USD



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# View Invoice Status

View Invoices



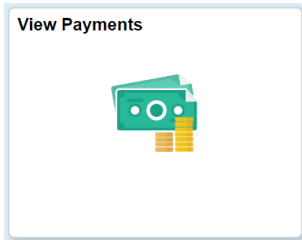
Vendors can check the status of their invoices, no matter how they are submitted.

The screenshot shows a web application interface for viewing invoices. The page title is 'Invoices' and the breadcrumb is 'Invoice and Payment inquiry'. The main heading is 'Review Invoices' and 'Invoice List'. Below this, it says 'COMPANY NAME, LLC'. There are links for 'Set filter options' and 'View Denied Invoices'. The 'Invoice List' section contains a table with the following data:

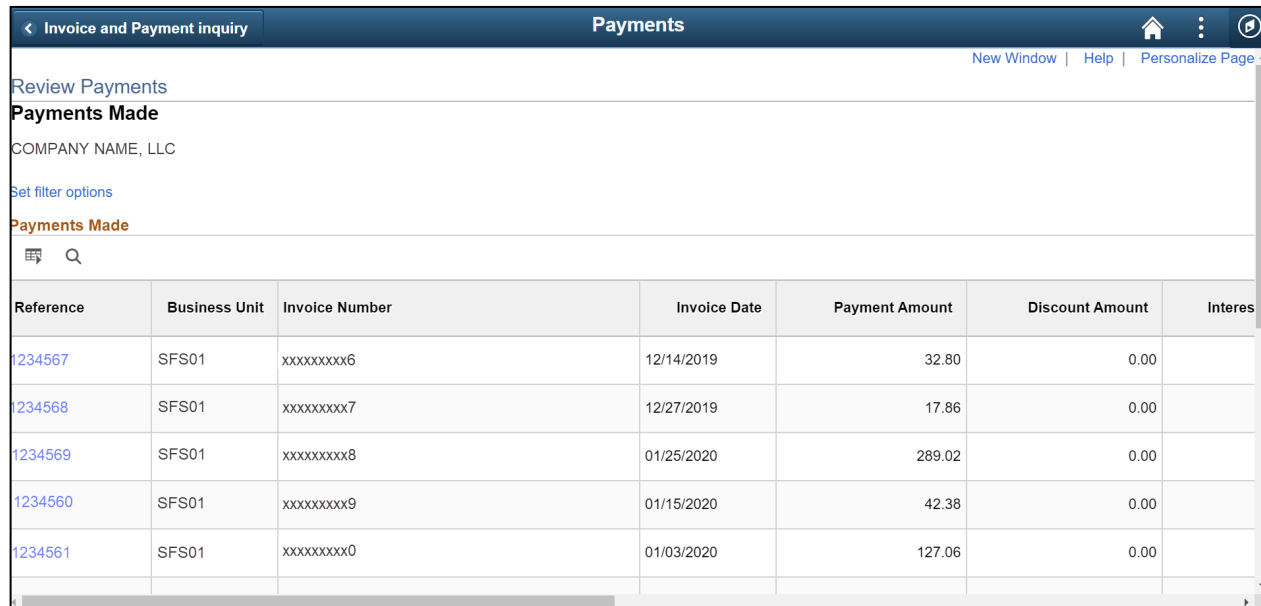
Invoice Number	Invoice Date	Gross Amt		Approval Status	Due Date	Voucher
xxxxxxxx1	02/11/2020	\$46.11	USD	Approved	03/16/2020	FG00001
xxxxxxxx2	02/11/2020	\$61.85	USD	Approved	03/16/2020	FG00002
xxxxxxxx3	02/11/2020	\$495.54	USD	Approved	03/16/2020	FG00003
xxxxxxxx4	02/08/2020	\$2,384.88	USD	Pending	03/14/2020	FG00004
xxxxxxxx5	02/07/2020	\$77.40	USD	Pending	03/15/2020	FG00005



# View Payment Detail Information



SFS provides a detailed breakdown of every payment a vendor receives. Information is broken down on each invoice.



The screenshot shows a web application interface for "Payments". The header includes "Invoice and Payment inquiry" and "Payments". Below the header, there are navigation links: "Review Payments", "Payments Made", "COMPANY NAME, LLC", and "Set filter options". A table titled "Payments Made" displays the following data:

Reference	Business Unit	Invoice Number	Invoice Date	Payment Amount	Discount Amount	Interes
1234567	SFS01	xxxxxxxxx6	12/14/2019	32.80	0.00	
1234568	SFS01	xxxxxxxxx7	12/27/2019	17.86	0.00	
1234569	SFS01	xxxxxxxxx8	01/25/2020	289.02	0.00	
1234560	SFS01	xxxxxxxxx9	01/15/2020	42.38	0.00	
1234561	SFS01	xxxxxxxxx0	01/03/2020	127.06	0.00	

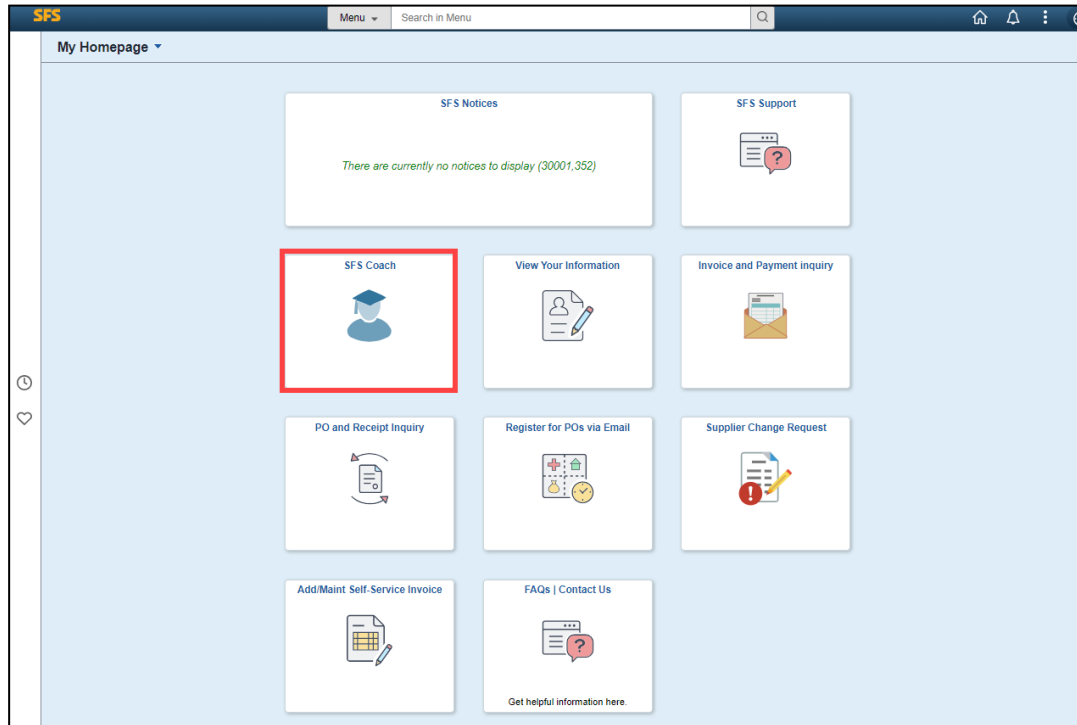


# Vendor Resources



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# Vendor Support – On-Demand SFS Training



Step-by-step instructions are available for vendors directly in the SFS Vendor Portal by clicking the SFS Coach tile on 'My Homepage.'



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# Agency Collaboration with Vendors



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# Communicating with the Vendor: PO Best Practices

- Best Practice POs have:
  - Detailed PO line descriptions or Catalog Item
  - Receiving setup as Required
  - The exact quantity (and unit of measure) or dollar amount being ordered
  - Actual Ship To Locations
  - Proper Bill To information



# Communicating with the Vendor: PO Best Practices

- Accurate Category Codes selected
- Comments and agency contact information used to communicate to vendors
- OGS centralized or Agency-specific contract IDs added (where applicable)
- A dispatch method set to email

For more information on PO creation best practices, agencies should review the following resources in SFS Coach Training:

- [PO Best Practices Presentation](#)
- [Purchase Order Best Practices Guide](#)
- [Vendor Location Overview](#)



# Communicating With the Vendor: Proper Invoice Standards

- A proper invoice is a written or electronic request for payment submitted by the vendor that **must** contain the following information:
  - Vendor name
  - Name of NYS Agency that ordered the goods or services
  - Description of goods or services for which requesting payment
  - Quantity of goods, property, or services delivered or rendered
  - Amount requested
  - Purchase order (PO) number, if applicable, as provided by ordering agency

GFO: [XII.4.F Proper Invoice](#)



# Communicating With the Vendor: Proper Invoice Standards

- When an invoice does not contain the above information, agencies must **reject** the invoice
- For additional assistance, the [Invoice Checklist](#) should be used by agencies and vendors to ensure consistency and completeness of invoices that are submitted to NYS for payment

GFO: [XII.4.F Proper Invoice](#)



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# When to Direct Vendors to the SFS Help Desk

- The SFS Help Desk is available Monday – Friday from 8:00 a.m. to 5:00 p.m. to assist vendors with questions focused on:
  - Finding their Vendor ID or enrollment/welcome email
  - SFS Primary Contact password resets
  - If the Primary Contact is no longer with the vendor organization or the name of the Primary Contact is unknown
  - Navigating within the Vendor Portal
  - Entering and maintaining their organizational information
  - Updating payment information
  - Accessing on-demand training



# When to Direct Vendors to the SFS Help Desk

Agencies are responsible for registering new vendors and supporting vendors through the SFS registration process. Agencies should also be prepared to address questions related to purchase orders, contracts, and the delivery of goods or fulfillment of services.



# Reminders for Agencies

Agencies should encourage vendors to:

- Complete online registration to establish a Vendor Portal account
- Receive electronic payments when possible
- Use Locations to define their business rules – PO email addresses, payment bank accounts, etc.
- Communicate to additional users who the Primary Contact is, and what tasks can only be done by the Primary Contact
- Put a reminder on their calendar to log into SFS once a month to keep their SFS access active



# Reminders for Agencies

- Review the on-demand resources and support available directly in the SFS Vendor Portal, including the [SFS Vendor Portal: Getting Started Guide](#)
- The following resources are available for agencies who do business with vendors:
  - [New Vendor Request](#) (JAA-AP205-022) job aid in SFS Coach Training provides agencies with step-by-step instructions on how to submit a request to the Office of the State Comptroller's Vendor Management Unit for a new vendor to be added to the SFS
- [Office of the State Comptroller's Guide to Financial Operations](#) is the reference source for Statewide accounting policies, procedures, and OSC related-mandates for use by State agencies



# 1099 Reporting Process



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# Who Provides Information for 1099 Reporting?

- Agencies are responsible for accurately identifying the payment amount subject to 1099 reporting
  - Withholding is the payment amount subject to 1099 reporting
  - Withholding occurs on the line level of the voucher
  - The agency must identify the correct **1099 type** and **withholding class** to report the payment amount
- Each record on the vendor file defaults to “Yes” for withholding



# How to Correctly Report 1099 Income

- When processing a voucher, the agency employee entering the voucher must determine whether the payment is 1099 reportable
  - If the payment is 1099 reportable, the processor must decide if the payment is reportable on the 1099-NEC or the 1099-MISC
  - If the payment is reportable on the 1099-MISC, the processor must determine the correct withholding class (i.e., 01, 03, 06 or 10)



# What Types of Payments Are 1099 Reportable?

Withholding Class	Types of Payments
1099-MISC Class 01	Rental/Lease Payments
1099-MISC Class 03	Client Payroll/Work for Pay
	Jury Payment
	Loan Forgiveness
	Prizes and Awards
	Settlement Payments to Claimants
1099-MISC Class 06	Hospital/Medical Payments
1099-MISC Class 10	Settlement Payments to Attorneys
1099-NEC Class 01	Payments to vendors for services

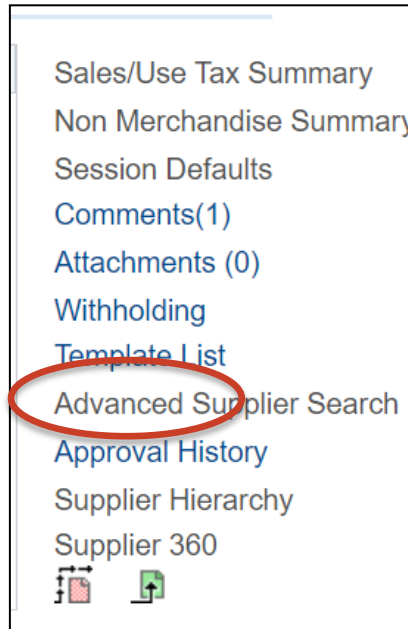
GFO: [XII.5.K Federally Reportable Payments](#)



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# Withholding on the Voucher

The agency voucher processor must select the “Withholding” link to review and/or update the withholding information on the voucher.



# Withholding on the Voucher

Invoice Line Withhold Information

Line 1 Description  
Withholding Code N01 Non-Employee Compensation

Withholding Applicable

Withholding Details

*Entity	*Type	*Jurisdiction	*Class	Withholding Basis Amt Override	Contract Reference	Rule Override	Apply Withholding	Applicable		
1 IRS	1099N	FED	01				Withhold at Payment	<input checked="" type="checkbox"/>	+	-



# How Are 1099s Corrected?

- Vouchers **CANNOT** be corrected by the agency once they are approved for payment
- If an agency incorrectly codes a voucher, an agency representative should email [Fedrep@osc.ny.gov](mailto:Fedrep@osc.ny.gov)
  - Fedrep@osc.ny.gov is the dedicated email address for all 1099 voucher corrections and questions
- All corrections are made in the 1099 software program, AccountAbility before 1099s are printed
- Corrections for Single Pay vouchers subject to 1099 reporting, should be sent via secure transfer file



# Contact Information for Support

- For questions or assistance using the SFS Vendor Portal, vendors can contact the SFS Help Desk:
  - [Helpdesk@sfs.ny.gov](mailto:Helpdesk@sfs.ny.gov), (855) 233-8363, or use the SFS Support tile on the SFS Vendor Portal homepage
- OSC Vendor Management Unit:
  - [Vmu@osc.ny.gov](mailto:Vmu@osc.ny.gov); [Vendupdate@osc.ny.gov](mailto:Vendupdate@osc.ny.gov) (for vendor-submitted forms such as Primary Contact changes)



# Q & A Session and Open Discussion



New York State Comptroller  
**THOMAS P. DiNAPOLI**