



# **User Manual**

*Polaris – Vendor Workflow*

## **Version 3.0**

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**Welcome to the Polaris Vendor workflow user guide!** This guide will help you understand and make the most of our application. Let's get started:

## Introduction

The intent of the Polaris application is to automate the Payables Invoicing process to improve quality, efficiency and timeliness of payment.

### Benefits:

Invoice creation - (A user can create and submit an invoice)

- A user will be able to search for a purchase order (PO) and Polaris will perform the needed validations to make sure that the user can submit the invoice.
- A user will be able to see all the previous invoices, remaining balances and raise an invoice against the PO for goods or services rendered.
- A user will be able to upload the invoice and supporting documentation.
- A user will be able to submit an invoice for approval considering that the invoice created meets all the required criteria in creating an invoice.
- A user will be able to see the status of their invoice.
- A user will be able to request documents such as sign-in sheet or attendance log.

## Getting Started

In order to gain access to Polaris you must first register for the Vendor Portal (VPortal). If you have already registered for the Vendor Portal, skip this step and proceed to page 6.

1. Go to <https://www.finance360.org/vendor/vendorportal> and click Register.



2. Enter your 9 digit tax ID and click Retrieve.

[Note: The person who registers first for the VPortal (with a specific tax identification number) will be known as the “Administrator”. The Administrator has the authority to grant access to an additional user(s) who need access to the CMT. Each user will manage their own account information, but the Administrator will perform the initial setup and grant permission to other users.]

The screenshot shows the VPortal login interface. At the top left is the 'VPortal' logo. Below it, a heading reads 'Please provide the required information to sign on to our system'. To the right of this heading is a 'Home' link. The main form area contains a text input field labeled 'TaxID (Do not use any dashes, just the plain 9 digits.)' with a 'Retrieve' button next to it. To the right of the form is a yellow informational box with text explaining the registration process. At the bottom of the page, the copyright notice reads '©2023 The New York City Department of Education'.

3. Enter your Vendor Contact Information and Contact Info (employee information for the particular User ID). [Note: The email address you enter must be a valid email account]

The screenshot shows the VPortal registration page. At the top left is the 'VPortal' logo. Below it, a heading reads 'Vendor Contact Information'. To the right of this heading is a 'Home' link. The form is divided into two sections: 'Vendor Contact Information' and 'Contact Info'. The 'Vendor Contact Information' section includes fields for 'Vendor Name\*', 'Address / Suite\*', 'City\*', 'State\*' (with a dropdown menu showing 'NY'), and 'Zip\*'. The 'Contact Info' section includes fields for 'First Name\*', 'Last Name\*', 'Phone\*', 'Fax', 'Email address\*', 'Retype your email address\*', and 'Website'. To the right of the form is a yellow informational box with text explaining the registration process. At the bottom of the page, the copyright notice reads '©2023 The New York City Department of Education'.

4. Select a Security Question from the dropdown menu or you may write your own. Then enter the Answer. Enter a Password, which is a minimum of 6 characters to a maximum of 21.

Password (minimum of 6 characters long)

Security Question  
Select One

Or  
Write My Own Question\*

Security Answer\*

Password\*

Re-enter Password\*

5. In the Bid List section, check the boxes of the bid lists in which you wish to be included and click the 'Submit' button.

Bid List

GOODS / COMMODITIES (Please select a category)

GOODS / COMMODITIES

<input type="checkbox"/> AIR CONDITIONERS & ELECTRIC FANS	<input type="checkbox"/> AQUACULTURE
<input type="checkbox"/> ART SUPPLIES AND MATERIALS	<input type="checkbox"/> ATHLETIC EQUIPMENT AND SUPPLIES
<input type="checkbox"/> AUDIO VISUAL EQUIPMENT	<input type="checkbox"/> AUTO, AVIATION, MARINE EQUIPMENT AND TOOLS
<input type="checkbox"/> AV SOFTWARE	<input type="checkbox"/> BATHROOM PARTITIONS AND ACCESSORIES
<input type="checkbox"/> BIOTECHNOLOGY	<input type="checkbox"/> BREAD, ROLLS & CAKES
<input type="checkbox"/> BUILDING / PLUMBING / ELECTRICAL / MISC.SUPPLIES,	<input type="checkbox"/> BUSINESS MACHINES (OFFICE MACHINES)
<input type="checkbox"/> CHALKBOARDS, CORKBOARDS & ACCESSORIES	<input type="checkbox"/> CHEMICALS AND METALS AND RELATED SUPPLIES
<input type="checkbox"/> COMMERCIAL PRINT SERVICES	<input type="checkbox"/> COMPUTER FURNITURE
<input type="checkbox"/> COMPUTER SOFTWARE	<input type="checkbox"/> COMPUTERS / SERVERS / MISC. IT EQUIPMENT

Cancel Clear Submit

This completes your VPortal registration process. You will be notified via email within 24 hours that your information has been validated and will then be able to access the

VPortal with your registered User ID and Password. For questions about VPortal registration, please call the Vendor Hotline at (718) 935-2300.

Once you receive the email notification that your information has been validated, you can sign into the VPortal.

The Polaris **vendor-facing application** can be found in the **Vendor Portal** suite of applications on the right side of the screen.

The screenshot shows the VPortal interface. At the top, it says "VPortal" and "Office of Supplier Diversity | Division of Contracts & Purchasing". A "Sign Out" link is in the top right. The main content area has a "Welcome, ADMINISTRATOR (\*\*\*\*6148)" message. Below this is a "PORTAL NEWS" section with a notice about the transition from paper to electronic communications for New York City Public Schools vendors. A blue box with a white arrow points to the "Polaris" link in the right-hand navigation menu.

Attention: New York City Public Schools Vendor  
Re: **Transition from Paper to Electronic Communications**  
As of July 1, 2023, New York City Public Schools ("NYCPS") will be moving to electronic communications for vendor purchase orders (PO). NYCPS will stop mailing hard copy POs and all POs will be sent to the email of record.  
To receive electronic purchase orders or any other relevant information from the City of New York and/or the NYCPS, a valid email address is necessary. Accordingly, you are required to confirm or update your email address by June 15, 2023.  
**To confirm or update your information:**  
Please be advised of the following requirements mandated by the New York City Comptroller to validate changed information reflected in the Financial Management System ("FMS"), the system of record:  
• If you are making any changes to your legal name, DBA (if applicable), address or contact information (including email address), you need to submit a completed W-9 form and Change Letter to Vendor Set-up via email at [vendorssetup@schools.nyc.gov](mailto:vendorssetup@schools.nyc.gov). For just an email address confirmation, change or addition (with no other changes to legal name or contact information), please submit a completed W-9 and indicate "Update/Confirm Contact Email Only" in the subject line to facilitate expedited processing.  
• The W-9 to use can be found at: [https://comptroller.nyc.gov/wp-content/uploads/documents/SUBSTITUTE-FORM-W-9\\_NYC\\_December-2014.pdf](https://comptroller.nyc.gov/wp-content/uploads/documents/SUBSTITUTE-FORM-W-9_NYC_December-2014.pdf).  
• The Change Letter should be on a company letterhead and must contain the old information (what is presently listed in the city's FMS database), the new information (what is on the submitted W-9), and a brief description of all that is changing, being added and/or being removed.  
• If the legal name and/or Tax ID are changing, an IRS 147C letter must be submitted (not older than two years old), and a Certificate of Amendment (only if legal name changed but not the EIN). If the requestor is an individual, a copy of the Social Security Card and/or Marriage Certificate.  
• If a DBA is being added or modified, an Assumed Name Certificate must be included. If the requestor is an individual, a copy of the Business Certificate.  
• Please note that street addresses are required for the vendor's physical location listed in the 1099 Address and Account Administrator Address sections of the W-9. Post Office boxes are not acceptable for these sections.  
If you have any questions, please contact Vendor Hotline via email: [VendorHotline@schools.nyc.gov](mailto:VendorHotline@schools.nyc.gov).

Navigation menu items on the right:  
• HELP  
• CMT Reference Guide  
• FAQ's  
• MTAC Tutorial  
• OTHER APP  
• MTAC  
• PO Download  
• RS/SETSS/IS Upload  
• RS/SETSS/IS Status  
• RS/SETSS/IS Report  
• RS/SETSS/IS Invoice  
• CMI  
• Vendor Evaluation  
• ASEP10 Instructions  
• Notice of Alloc/Instr  
• IDEA Allocations  
• ASEP 10F  
• Disposal of Supplies  
• Disposal of Equipment  
• SETSS Invoice Template  
• SETSS FAQ  
• Pre-k RS Inv. Template  
• RSA-7A Inc. Template  
• RSA-7B Nurse/Aide Inv.  
• RSA-Oral Transliterate  
• RSA-7C School Bus Inc.  
• RSA FAQ  
• Polaris  
• PKA

Once you click on the "Polaris" link shown above, you will be taken to the homepage of the new Polaris application.

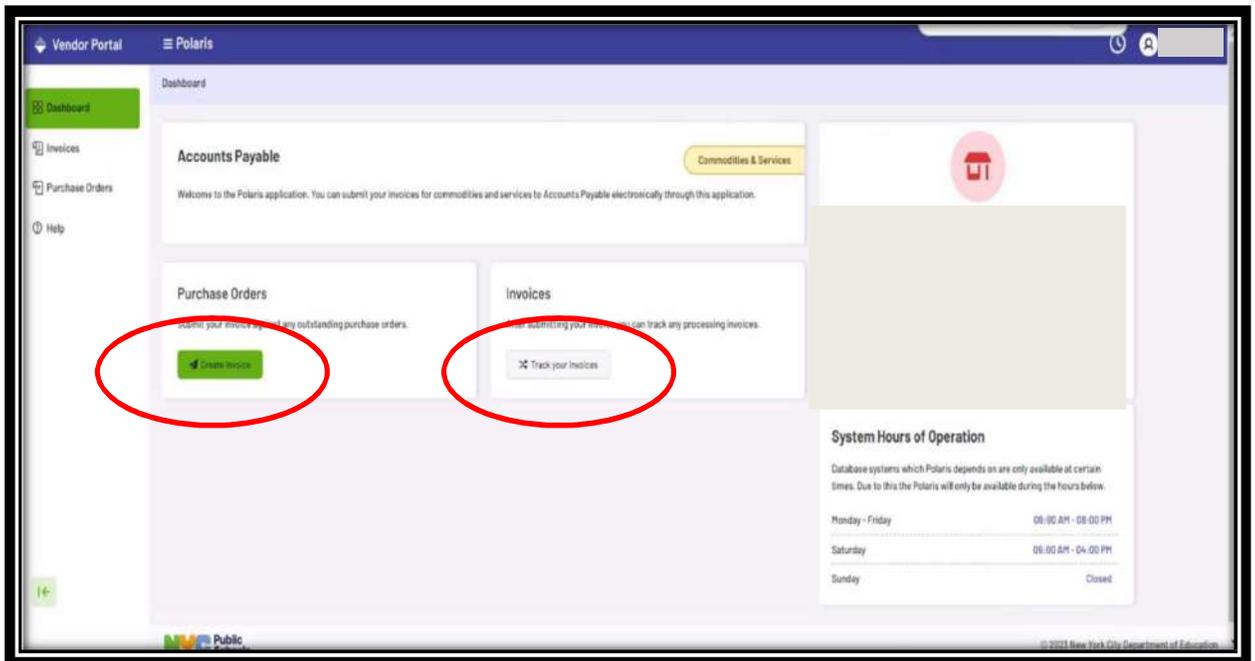
## User Interface

Understanding the Polaris user interface is crucial for an efficient use of the application. We'll walk you through the various features and options available on the screen.

## Basic Functions

### 1. Dashboard

- On the dashboard you have the option to click “Create Invoice” which will allow you to create an invoice by the purchase order number input.
- Further, on the dashboard you have the option to click “Track your Invoices” to see the status of your invoices.



### 2. Invoices

- On the screen, when you click on “Invoices”, you will see a list of all your invoices indicating status, DOE Submission #, vendor Invoice #, purchase order # (PO), Create Date (of invoice) and amount.

Vendor Portal Polaris

Dashboard Invoices Purchase Orders Help

Create Invoice

Status	DOE Submission #	Vendor Invoice #	PO #	Created On	Amount
Submitted	PLR000005170	MG12345		01/09/2024	\$501.00
Missing Required Documents	PLR000005168	secapproval		01/08/2024	\$1,000.00
Voucher Rejected	PLR000005168	182024I		01/08/2024	\$100.00
Voucher Rejected	PLR000005167	182023		01/08/2024	\$100.00
Rejected	PLR000005164	152024		01/05/2024	\$100.00
Draft	PLR000005163	MM1234		01/05/2024	\$13.00
Draft	PLR000005162	MG1234		01/05/2024	\$15.00
Under Review	PLR000005161	MG1234		01/05/2024	\$17.00

### 3. Purchase Orders

- This menu option on the left will allow you to create an invoice by the purchase order number input.

Dashboard Invoices Purchase Orders Help

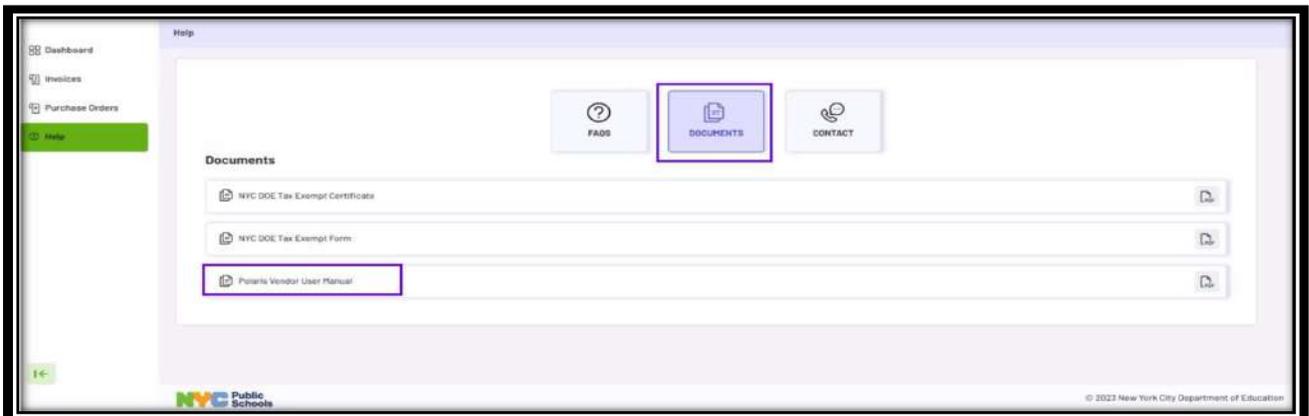
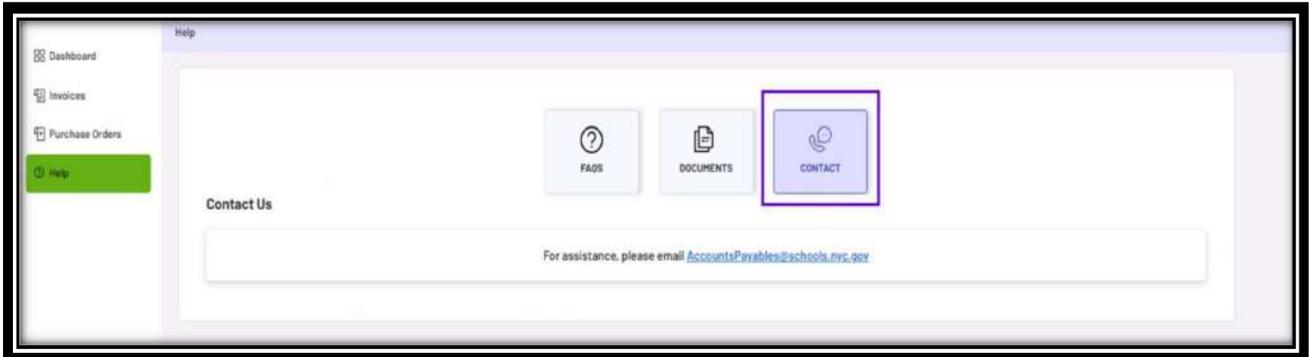
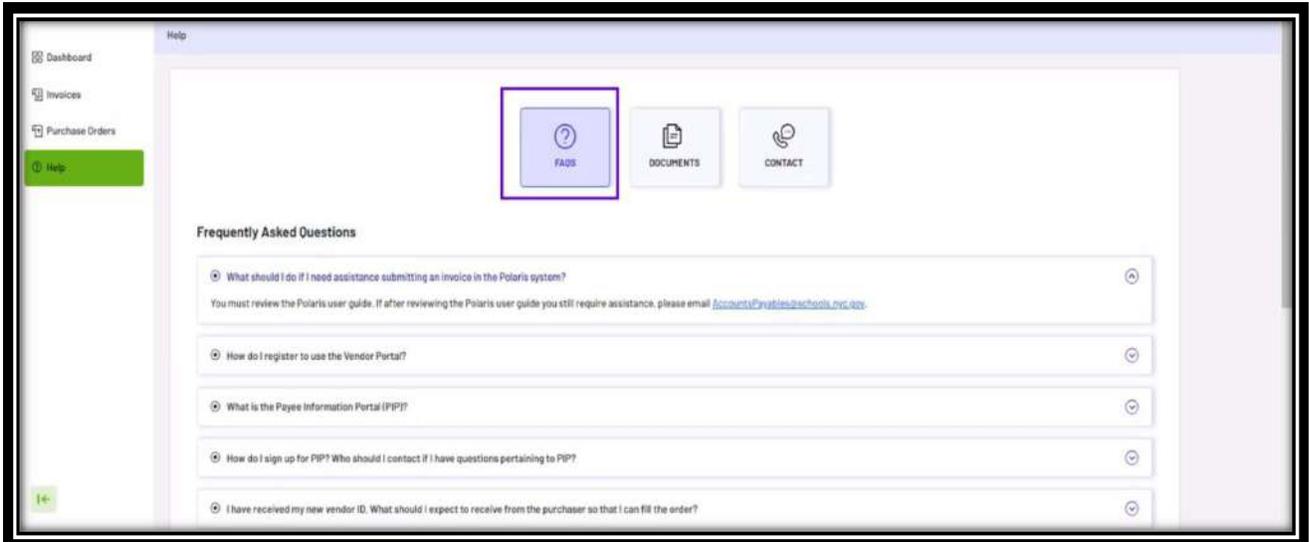
Purchase Orders (PO)

To submit an invoice please provide purchase order number

Submit

#### 4. Help

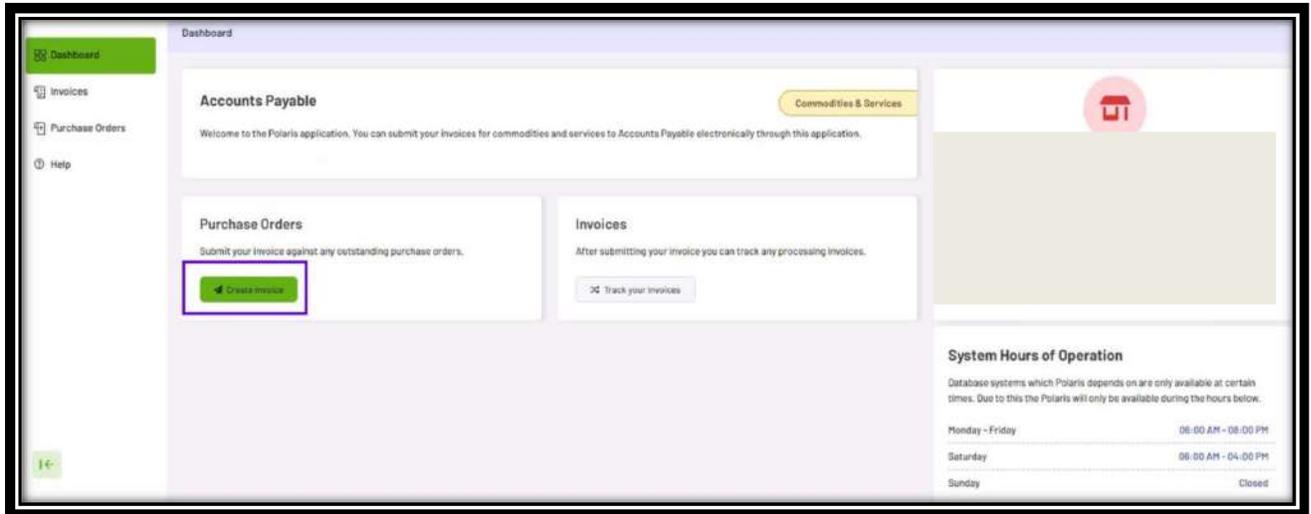
- When you click on “Help”, the screen displays Frequently asked questions (FAQ’s), Documents (User Manual) and Contact information.



## Creating an Invoice

Follow the steps below to create an invoice.

1. Click on the “Create Invoice” button which is located on the Dashboard tab.



2. Enter the Purchase Order number



3. After you enter the Purchase Order number, the purchase order information displays. Click on the “Create Invoice” button.

- The Top section of the PO details page entails the PO amount, total Invoiced Amount on the PO and the PO Balance. If the PO Balance is **Zero**, the Vendor will not be able to create an invoice on the PO.
- The middle section provides details on Quantity and Delivery for the PO and is non-editable by the Vendor.
- The bottom section displays all invoices created on the PO along with their status.

**Purchase Order (PO)** Create Invoice

Purchase Order #: [redacted] Contract #: [redacted] PO Amount: \$23,495.00 Total PO Invoiced Amount: \$4,000.50 Total PO in Process Amount: \$11,002.01 PO Balance: \$8,492.49

**Details**

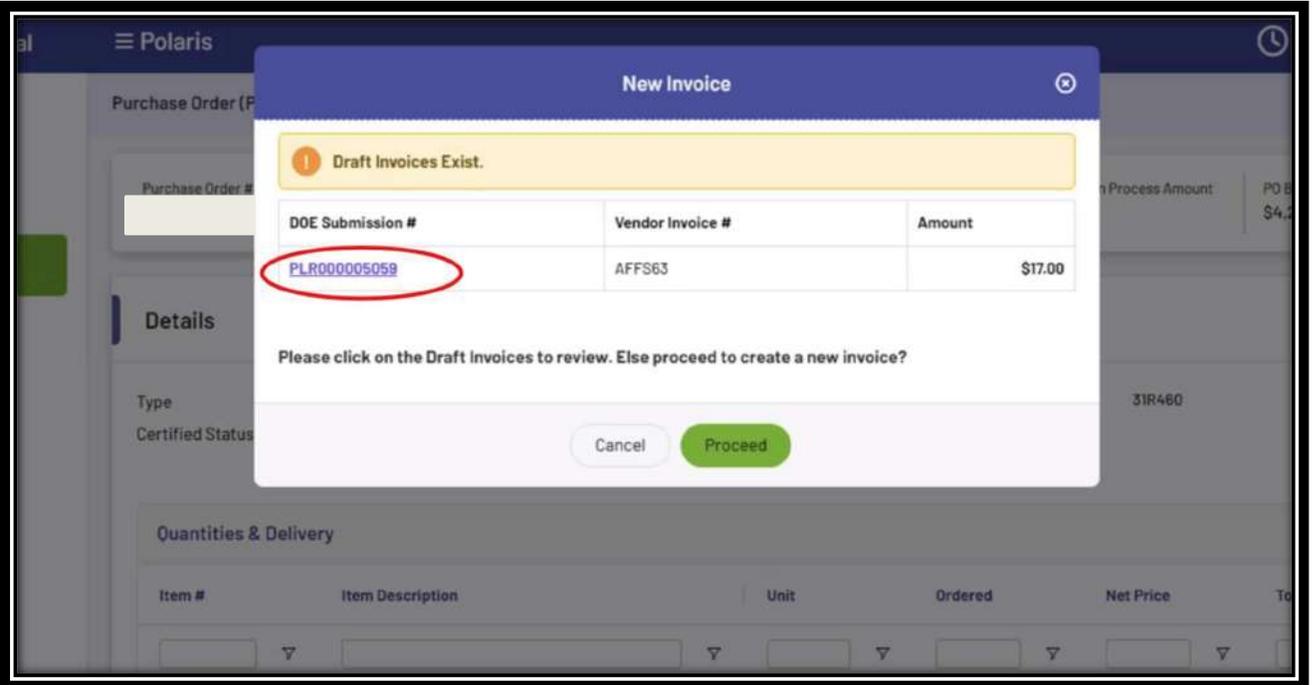
Type: Professional Services Location: 250764  
 Certified Status: This Purchase Order is certified.

**Quantities & Delivery**

Item #	Item Description	Unit	Ordered	Net Price	Total Cost
N/A	MUSIC FOR SECOND SEMESTER	EACH	06.25	\$127.00	\$12,096.75
N/A	MUSIC INSTRUCTION FOR K THROUGH S	HOUR	09.75	\$127.00	\$11,996.25

1 to 2 of 2 Page 1 of 1

4. If you have already created a draft invoice on the PO, it will be displayed as shown below and you can edit the fields including the invoice amount, upload documents in the Draft Invoice by clicking on the PLR link or can click “Proceed” to create a new Invoice in next step.



#### If no Draft Invoice exists

5. Vendors are required to enter the vendor invoice number and invoice amount on the New Invoice screen to proceed with the invoice creation. Enter vendor invoice number and the invoice amount. Then click the “Create Now” button.

**New Invoice**

PO Number	Total PO Amount	Total Invoiced Amount	PO Balance Amount
	\$23,495.00	\$4,000.50	\$8,492.49

Vendor Invoice Number\*

Invoice Amount\*

Cancel **Create Now**

Below invoice details screen is displayed with a unique DOE submission number generated by the Polaris Platform.

**Vendor Portal** | Polaris

Switch APT to **Invoices** / PLR000012516 Delete Submit

Dashboard  
Invoices  
**Purchase Orders**  
Help

**Documents** 1 **Quantities & Delivery** ✓ **PO Certification** ✓

**Required Documents Missing** - this may slow down invoice payment

**Vendor Documents**  
1 Invoice 1 Service Agreement / Scope of Work 1 Work Order

**Vendor/Purchaser Documents**  
1 Agenda & Sign-In Sheet

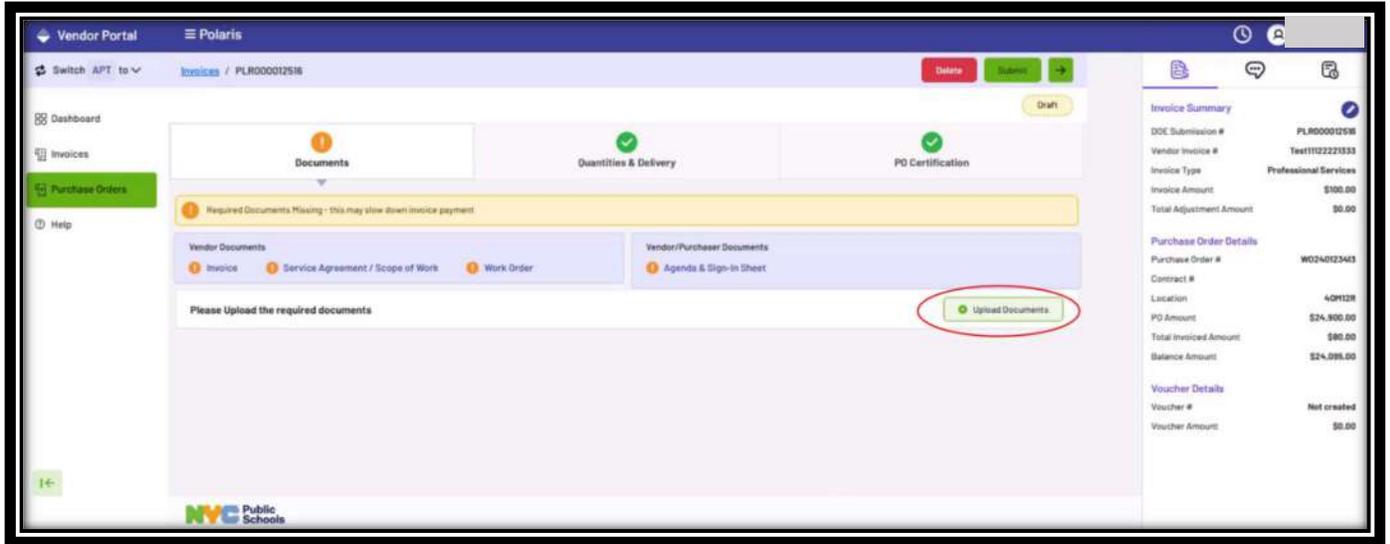
Please Upload the required documents Upload Documents

**Invoice Summary**

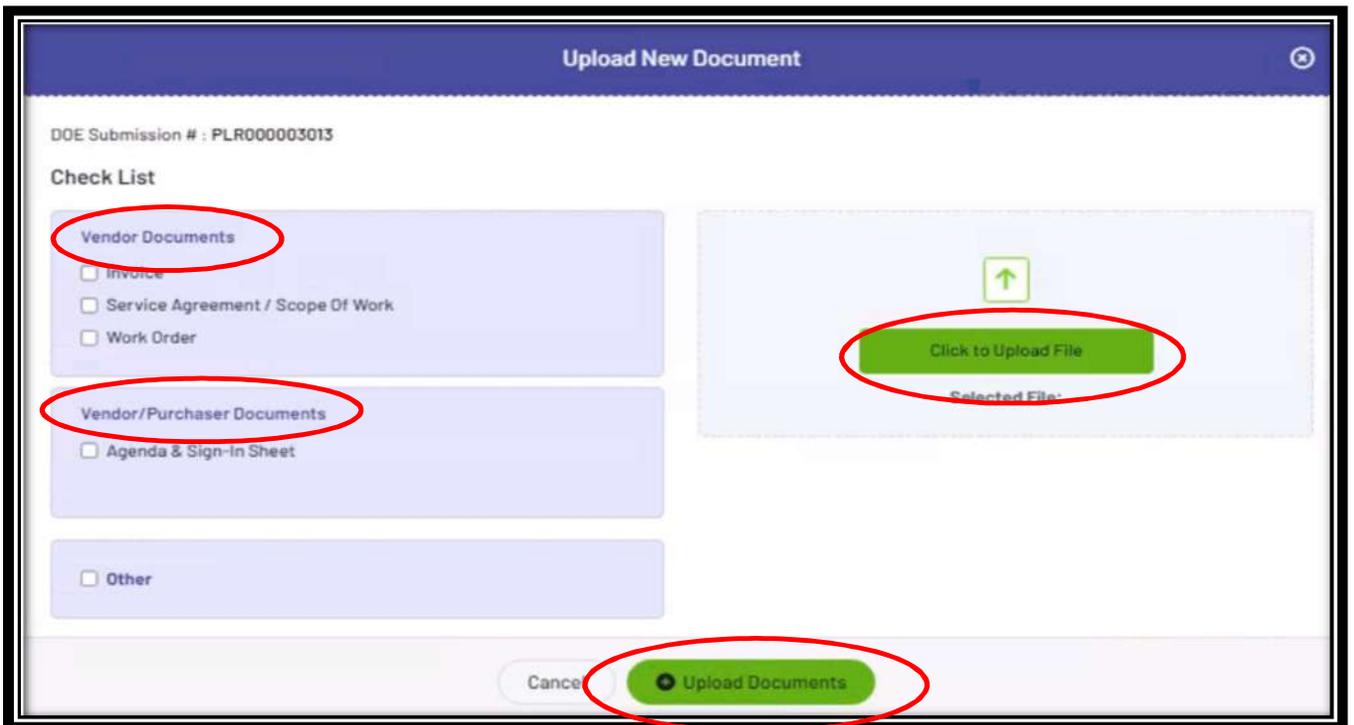
DOE Submission #	PLR000012516
Vendor Invoice #	Test112221333
Invoice Type	Professional Services
Invoice Amount	\$100.00
Total Adjustment Amount	\$0.00
<b>Purchase Order Details</b>	
Purchase Order #	W024012343
Contract #	
Location	409128
PO Amount	\$24,900.00
Total Invoiced Amount	\$80.00
Balance Amount	\$24,095.00
<b>Voucher Details</b>	
Voucher #	Not created
Voucher Amount	\$0.00

NYC Public Schools

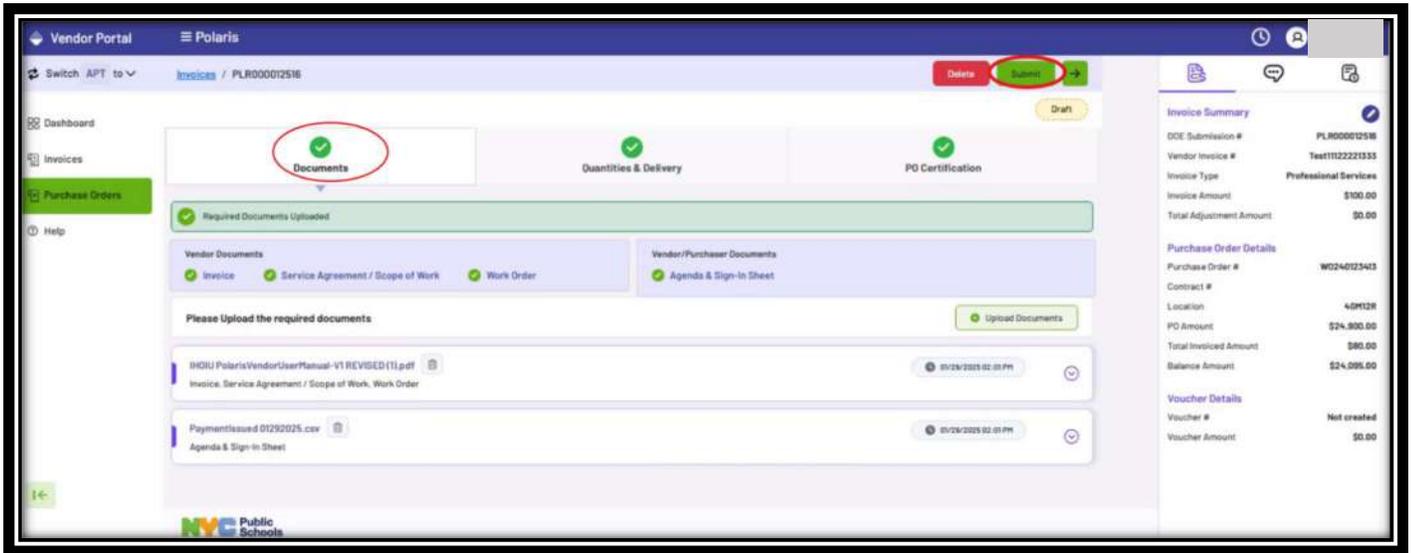
6. Upload all required documentation by clicking on the “Upload Documents” button.



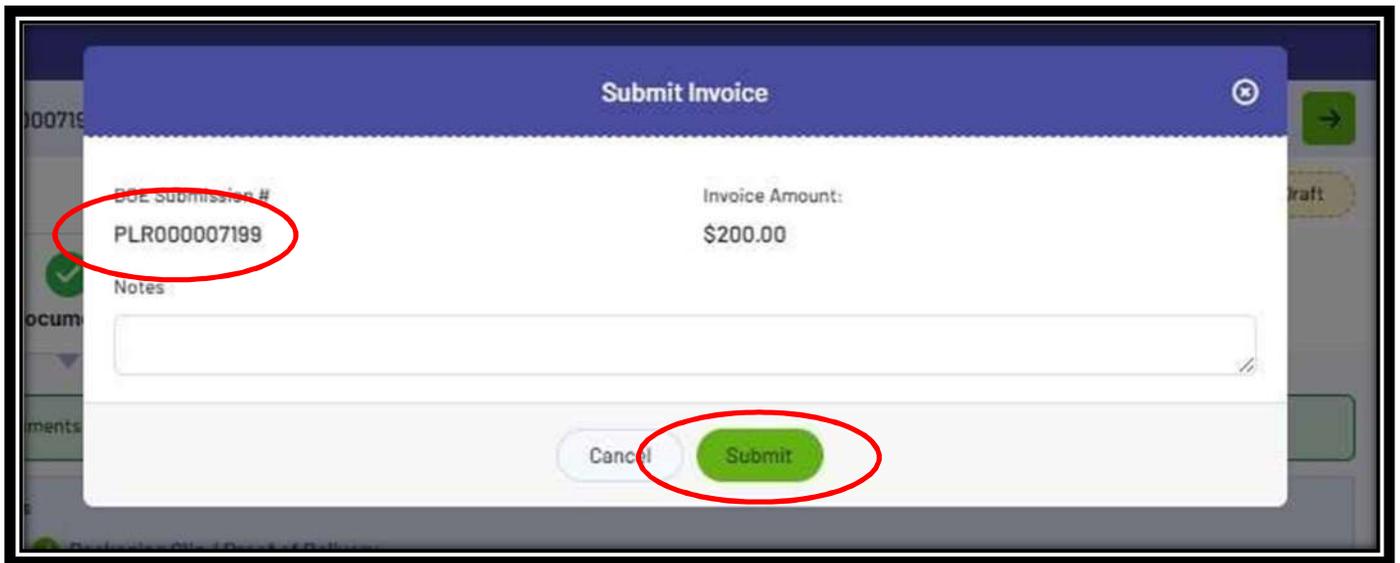
7. Check the appropriate box under Vendor Documents, Vendor/Purchaser Documents or Other and select the "Click to Upload File" button. Select the documents you are uploading from your computer.



8. Once you have uploaded the required documents you will see a green checkmark for Documents. You are now ready to submit the invoice. Click the Submit button.



9. A popup should appear that displays the DOE Submission # and Invoice Amount. Adding a note is optional. Click the submit button.



10. This completes the invoice submission.

## Purchase Order Description

A purchase order is broken up into three sections.

1. Purchase order details
2. Quantities and Delivery
3. Invoices

### Purchase order details

Purchase order details shows all the details of the PO

- Total PO Amount - This field represents the Total value of Purchase order contract.
- Total PO Invoiced Amount – This field represents the amount that we have already paid to the vendor.
- Total PO in Process Amount – This field represents that the vendor has submitted the invoice, and it is in the admin queue for processing.

Item #	Item Description	Unit	Ordered	Net Price	Total Cost
N/A	MUSIC FOR SECOND SEMESTER	EACH	95.25	\$127.00	\$12,096.75
N/A	MUSIC INSTRUCTION FOR K THROUGH 5	HOOR	93.75	\$127.00	\$11,998.25

### Quantities and Delivery

The quantities and delivery section represents all the different items with their description and shows how many unit's were ordered and their price and total.

Item #	Item Description	Unit	Ordered	Net Price	Total Cost
N/A	MUSIC FOR SECOND SEMESTER	EACH	95.75	\$127.00	\$12,096.75
N/A	MUSIC INSTRUCTION FOR K THROUGH5	HOUR	89.75	\$127.00	\$11,398.25

## Invoices

On the invoices section of the PO you can view the status of the invoices in three tabs

- Processing invoices – represents invoices that have been submitted and not yet approved by the Accounts Payable office.
- Approved Invoices - represents invoices that have been submitted and approved by the Accounts Payable office.
- Draft invoices – represents invoices that have not been submitted by the vendor.
- Deleted Invoices – Represent the invoices that are deleted by the Vendor.
- Draft Invoices – Represent the invoices that are created by the Vendor and not submitted.
- Rejected – Represent the invoices that are rejected by the reviewer.
- Payment Issued – Represent the invoices that on which payment is issued.

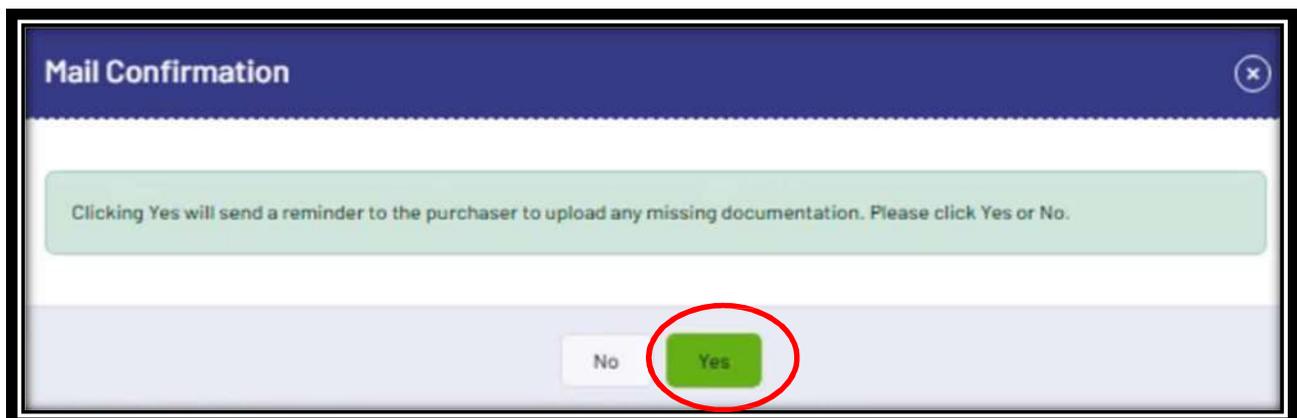
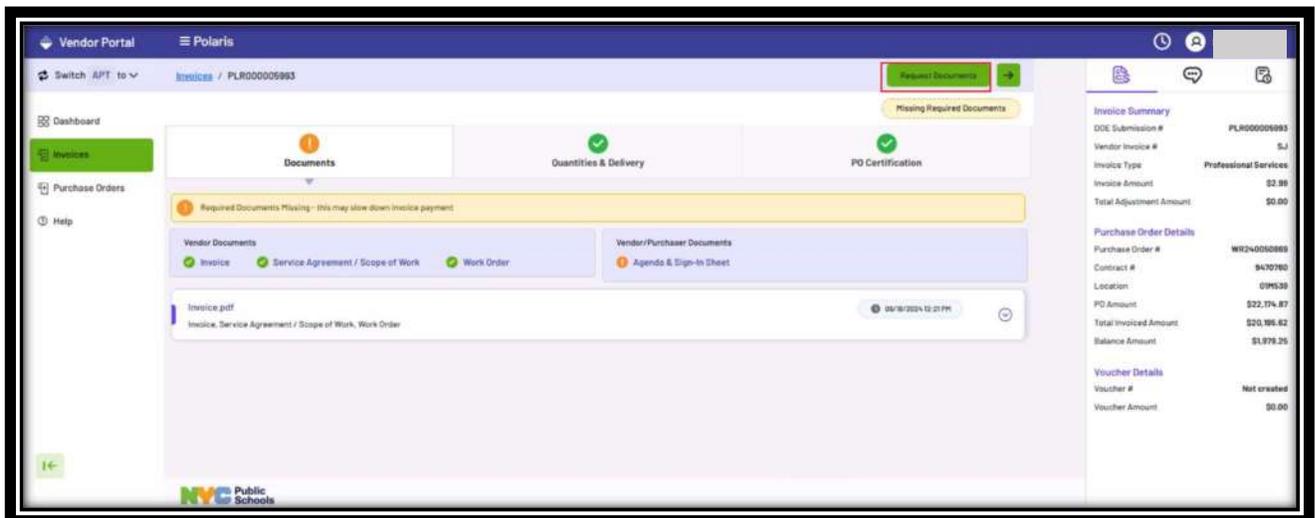
Status	DDE Submission #	Vendor Invoice #	Voucher #	Created On	Amount
Payment Issued	PLRD00003058	22222		07/23/2024	\$600.00
Payment Issued	PLRD00003098	11111		07/23/2024	\$100.00
Under Review	PLRD00003014	shanJuly803		07/08/2024	\$1,000.00
Draft	PLRD00003013	shanJuly802		07/08/2024	\$1,000.00
Voucher Rejected	PLRD00003012	shanJuly802		07/08/2024	\$10,000.01
Missing Required Documents	PLRD00002015	shan004		06/28/2024	\$1.00
Under Review	PLRD00002014	shan003		06/28/2024	\$1.00

## How to Request a Document

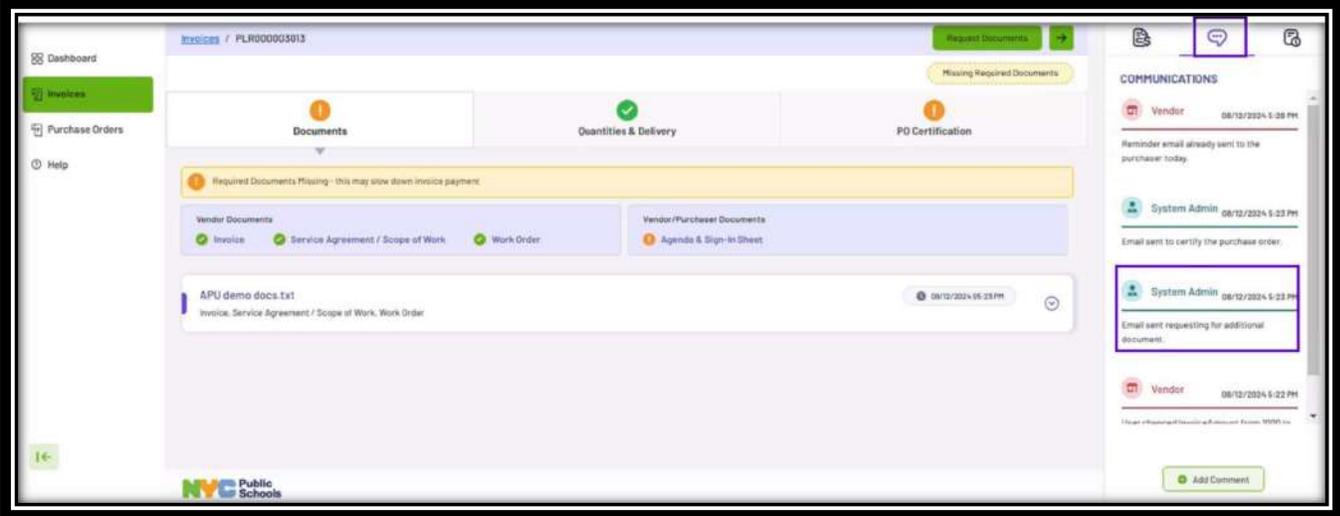
If you created and submitted an invoice and the status reads “Missing Required Documents” you have the functionality to click on a button called “Request Documents” which will send a reminder email to the purchaser.

Steps:

1. Click on your invoice with status Missing Required Documents
2. Click on the Request Documents button in green on the top right
3. Once the popup displays, click Yes.



Email is sent to the school administrator and can be seen on the communication tab from the Invoice Details page.



## Invoice Details Page

You can access the invoice details from the summary section on the Invoice Details page. Any adjustments made by the Central Field Office will be reflected in the **Total Adjustment Amount** field. The **Voucher Amount** will be calculated as the difference between the **Invoice Amount** and the **Total Adjustment Amount**.

The screenshot displays the Vendor Portal interface for invoice PLR000012501. The main content area shows a 'Submitted' status and a summary table on the right. The summary table includes the following data:

Invoice Summary	
DOI Submission #	PLR000012501
Vendor Invoice #	6273767829479
Invoice Type	Commodities
Invoice Amount	\$25.00
Total Adjustment Amount	\$6.00

Purchase Order Details	
Purchase Order #	WRQ4083287
Contract #	PCN7296
Location	40M28
PO Amount	\$81.12
Total Invoiced Amount	\$0.00
Balance Amount	\$81.12

Voucher Details	
Voucher #	Not created
Voucher Amount	\$0.00

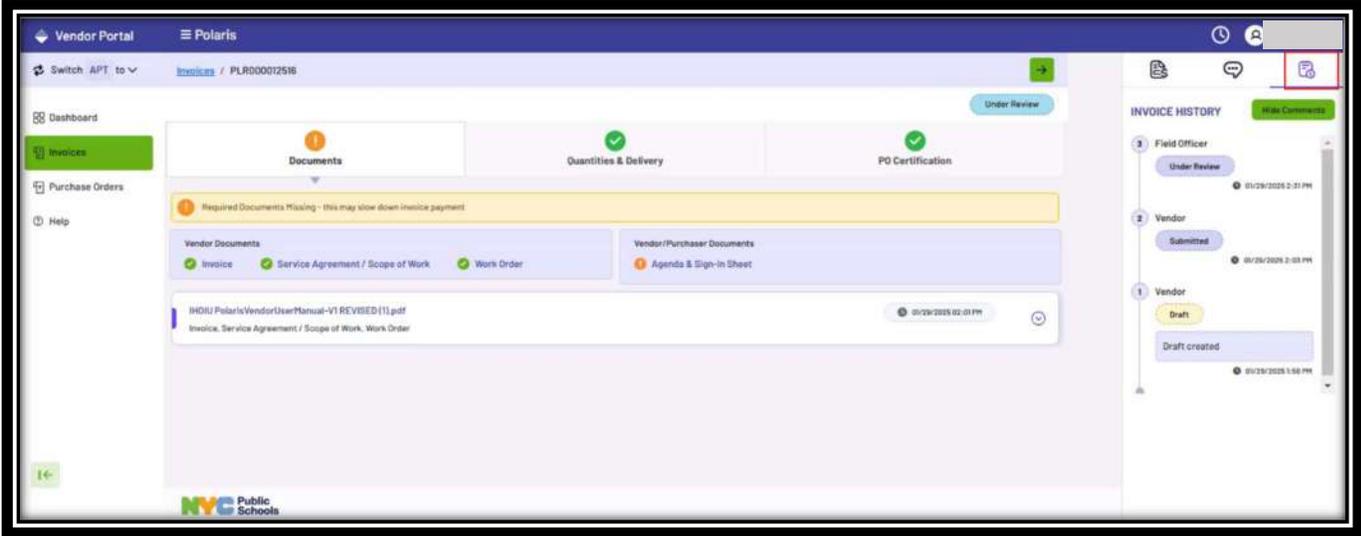
You can access the communication on the invoices from the communication tab on the Invoice Details page.

You can also add comment by clicking on the “Add Comment” button.

The screenshot displays the Vendor Portal interface for invoice PLR000003013. The main content area shows a 'Missing Required Documents' status and a communications tab on the right. The communications tab includes the following data:

COMMUNICATIONS	
Vendor	08/12/2024 9:28 PM
Reminder email already sent to the purchaser today.	
System Admin	08/12/2024 9:23 PM
Email sent to certify the purchase order.	
System Admin	08/12/2024 9:23 PM
Email sent requesting for additional document.	
Vendor	08/12/2024 9:23 PM

You can access the information about the Invoice flow from the Invoice Workflow history tab on the Invoice Details page.



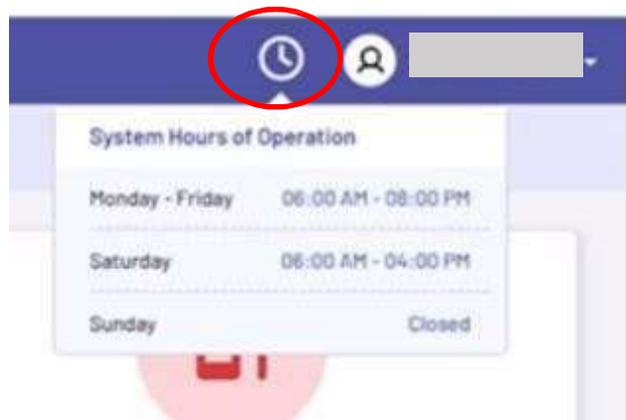
## Status Descriptions

Status Label Name	Description of the Status
Draft	This status will be displayed when a vendor creates an invoice.
Missing Required Documents	This status will be displayed when a vendor submits an invoice that requires the school to upload specific documents.
Submitted	This status will be displayed when a vendor submits an invoice, and all required documents have been submitted by both the vendor and the school.
Under Review	This status will be displayed after the invoice is assigned.
Voucher Created	This status will be displayed after the invoice is approved and successfully sent to FAMIS.
Payment Processing	This status will be displayed after the voucher is sent to FAMIS, and the FAMIS team is processing the voucher.
Voucher Rejected	This status will be displayed after the invoice is sent to FAMIS, and FAMIS has rejected the voucher.
Payment Issued	This status will be displayed after the invoice is sent to FAMIS, and FAMIS has successfully submitted the voucher.
Rejected	This status will be displayed when the processor rejects the invoice.

## System Hours of Operation

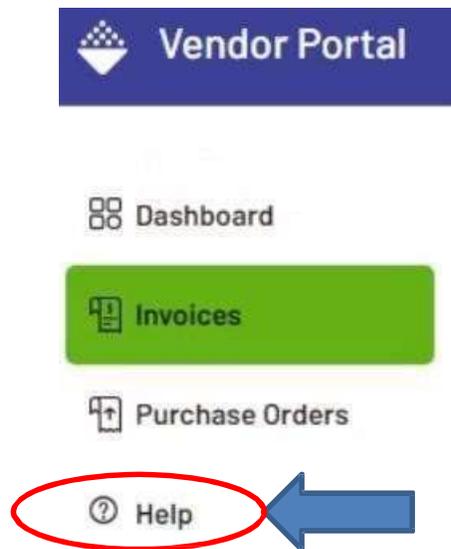
The hours of operation for Polaris Vendor Portal are as follows: Monday-Friday:  
6:00AM- 8:00PM  
Saturday: 6:00AM- 4:00PM  
Sunday-Closed

You can also click on the time icon on the dashboard to view this information.



## Frequently Asked Questions (FAQ)

The FAQ can be viewed in the Help section of Polaris Vendor.



## Support

This user guide is here to assist you every step of the way. If you have any questions or need further clarification, don't hesitate to reach out to our support team.

For help, contact:

Accounts Payable contact information ([AccountsPayables@schools.nyc.gov](mailto:AccountsPayables@schools.nyc.gov))

