Vendor Tutorial For CAP Invoice

Steps for Submitting a CAPS Application:

1. **Accessing the CAPS Form:**
   - Visit **CAPS Invoice** online Application to fill out the CAPS Invoice
   - The form and more information are also available on the **Building Maintenance Vendors** page on the New York City Public School InfoHub under the "CAP Invoicing Process Update" section.

2. **Section 1: Contractor's Application For Payment**
   - Fill in all required fields. It is important to complete this section correctly as your application may be rejected if we cannot determine who is submitting the form.

   Example: Section 1 – Contractor and Business Information, and billing type

   Section 1: Contractor's Application For Payment

   Billing Type *
   ○ Partial   ○ Full Billing

   Company Name *

   Address *

   City, State, Zip Code *

   Federal ID # *

   Contract # *

   Proceed # *

   Work Order # *

   Bldg. ID # *

   Region / Team *
   [Select ▾]

   Application for payment is hereby made completed during the period:

   Work Completed From *

   Work Completed To *

   Contractor's Certification

   I (WE), _____ (Contractor), attest to the truth of the Contractor's Certification, on the t document, relating to the contract dated.

   Contractor Name *

   Contractor Email *

   Contract Date *

3. **Section 2: Detail of Payment:**
   - Please enter payment details based on the scope of work and/or contract.
   - As in section 1 of the paper application, you are given space to enter eleven items.
     - o Select the number of items you would like to add to this application. *Example: Number of items listed in this application.*

Section 2: Detail of Payment

Number of items listed in this application *

Select

1
2
3
4
5
6
7
8
9
10
11

   - Item description will open below for the number of items selected.
     - o [**2. Description of item**] Start by entering a brief description of 75 characters or fewer.
     - o [**3. Total No.**] Enter the total number of units.
     - o [**4. Unit Cost**] Enter the cost per unit.
     - o [**5. Contract Value (COL. 3x4)**] The system will calculate the **Contract Value** by multiplying the **total number of units** entered by the **cost per unit** entered and place it in the appropriate section of your application.
     - o [**6. Amount Previously Certified**] Entered the amount previously certified *(This area is only applicable for partial payment application as indicated in the billing type above*. If there is no amount, then write 0.)
     - o [**7. Payment Amount Due this Estimate**] The system will calculate the difference between **Amount Previously Certified** by subtracting it from the **Contract Value** calculated and place it in the appropriate section of your application.

Example: Detail of Payment.

Billing Type *

○ Partial   ⦿ Full Billing

Number of items listed in this application *

| 1 | ▾ |

1. Item Description *
Application description must be 75 characters or fewer. Otherwise, it will be rejected.

Test

1. Unit Total No *

200

1. Unit Cost *

150

1. Amount Previously Certified *
Only applicable for partial payments

0

Billing Type *

⦿ Partial   ○ Full Billing

Number of items listed in this application *

| 1 | ▾ |

1. Item Description *
Application description must be 75 characters or fewer. Otherwise, it will be rejected.

Test

1. Unit Total No *

200

1. Unit Cost *

150

1. Amount Previously Certified *
Only applicable for partial payments

200

- Scan all supporting documents ahead of time and save it with the appropriate title.
  - Upload all supporting documents for the CAPS Application.

  Example: File Upload for supporting documents.

File Upload *
Please upload all supporting documents for the CAPS Application.

Drag and drop files here or browse files

  - Finally, review all the information you have provided, and make sure to check the boxes indicating that you've reviewed everything.

☑ **By checking this box, you confirm that you have thoroughly reviewed the entire form to ensure all information entered is accurate. Any errors will require you to resubmit a new CAP Invoice or may delay the process.** *

[Submit]

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- o After confirming that the information you entered is correct, Submit your application.

4. **Submission Confirmation:**
    - After submitting your application, the vendor will receive a confirmation email.
      Example of a confirmation email

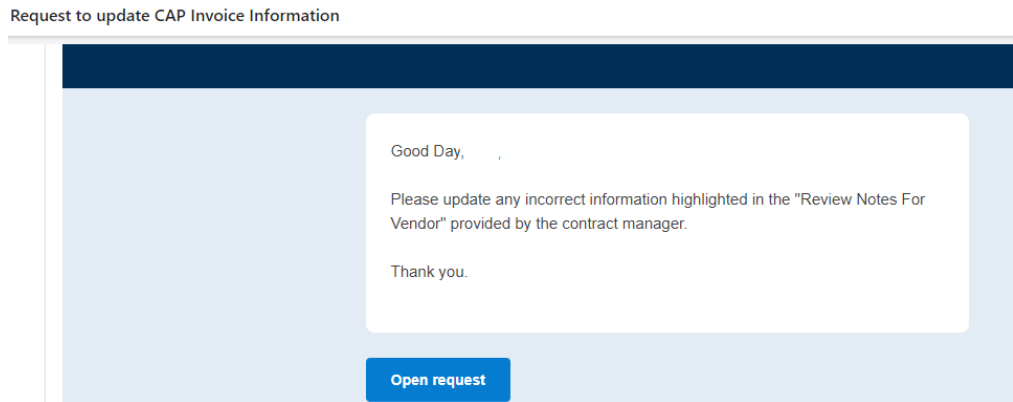5. **The CAPS Team will review the application.**
6. **DocuSign email: Vendor will receive an email to sign the approved CAP.**
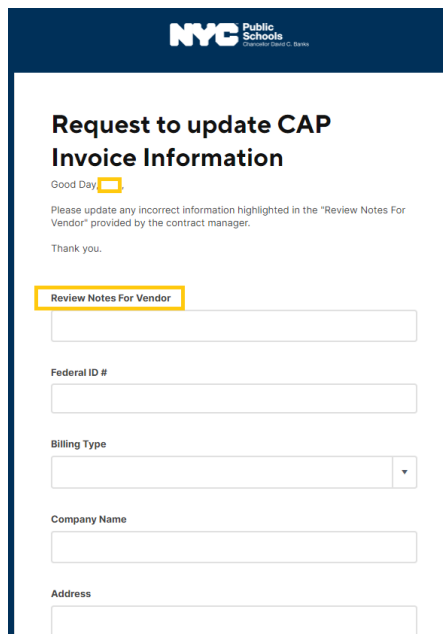7. **The CAPS Team will review the application.**
8. **Responding to Updating Incorrect Information:**
    - o Look for an email from **automation@app.smartsheet.com**.

o *Example: Vendor View - Click on "open request" to respond.*

Request to update CAP Invoice Information

Good Day,   ,

Please update any incorrect information highlighted in the "Review Notes For Vendor" provided by the contract manager.

Thank you.

Open request

o Click on the "**Open request**" button in the email (it's the blue button).
  o The link will open in your default browser.
o **Read Instructions:** Look for the "***Review Notes For Vendor***" box. This is where the contract manager will provide specific instructions on what needs to be corrected.
  • *Example: Vendor View – after clicking on "open request" to respond.*

NYC Public Schools
Chancellor David C. Banks

Request to update CAP Invoice Information

Good Day, [   ],

Please update any incorrect information highlighted in the "Review Notes For Vendor" provided by the contract manager.

Thank you.

Review Notes For Vendor

Federal ID #

Billing Type

Company Name

Address

■
o Follow the instructions and make the **necessary corrections**.
o Check the box labeled "**Review Update Information (Must check this box)**" to confirm that you have made the updates.
 *Example:*

Review Update Information (MUST check this box)

☐

Attachments

Upload Files

▶ 3 Attachments

☐ Send me a copy of my responses

Submit Update

- o *Note: If you **do not check this box**, the contract manager will not receive your updated information, and your **CAP will be rejected**.*
- o If you want to keep a record of your submission, check the box "**Send me a copy of my response**".

    Example:

☑ Send me a copy of my responses

- o Click the "**Submit Update**" button to finalize and send your corrections.

    Example:
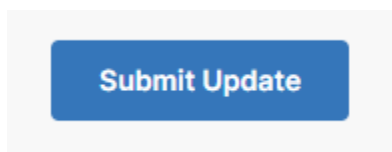
Submit Update

By following these steps, Vendor can ensure that their invoice corrections are properly submitted and reviewed.

Important Notes:

- o CAPS Communication: We will contact you if any updates, changes, or supporting documents are needed.
- o Review Before Submitting: Please review all data carefully before submitting the form.
- o Multiple Items: If you have more than 11 items, please submit an additional application.
- o Submission Confirmation: Check the confirmation email after submission. Contact the CAPS team if you need any corrections or assistance.

- o Accurate Email Address: Ensure the email address you provide for the contractor/company is accurate for CAPS team communication.