

Procedures to Certify Final Service Request 2013-14

These procedures allow each district to certify their Final Service Request for the total contract with their “Home” BOCES and for individual Provider BOCES cross contract services.

The process to Certify Final Service Requests has been divided into three steps: **1) Verification, 2) Finalization, and 3) Certification.**

Step 1: Verification: Verification is simply making sure that every service is checked either “yes” or “no” in the “Purchase Service” Column of your service request form. When one of the boxes is checked, the name of the person who verified the service last will appear in the “Verified By” column, along with the date it was last verified in the “Verified On” column.

	2012-13 Unit Cost	2012-13 Cost	2012-13 Unit Basis	2012-13 Request	Fee Notes	Purchase Service	Period End	Provider Code	ST-3 Code	Verified By	Verified On	Action	
10.0000	12,110.0000	121,100.00	Student	121,100.00		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	05/31/2012		A2280.49	Maureen Kaelin	04/18/2012		
10.0000	905.0000	9,050.00	Student	9,050.00		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	05/31/2012		A2280.49	Maureen Kaelin	04/18/2012		
00.0000	1,686.0000	168,600.00	Day	0.00		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	05/31/2012		A5581.49	Maureen Kaelin	04/18/2012		
2.0000	339.2500	678.50	Annual	678.50		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	05/31/2012		A2620.49	Maureen Kaelin	04/18/2012		
10.0000	7.7200	3,213.00	Student	0.00		<input type="checkbox"/> Yes <input type="checkbox"/> No	05/31/2012		A1680.49				
Total													
2012-13 Requested **											\$130,828.50		

Each service or subservice that has an amount in the “2013-14 Cost” column must be checked “Yes” in the Purchase Service column to indicate the district’s intention to include the service in their 2013-14 Final Service Request.

To avoid having to search for each individual service to update, you can use the available filters to assist in this verification process. They can be used in any combination. At the top of your service request form you will find two filters:

The screenshot shows the 'Service Request' form in WinCapWeb. At the top, there is a breadcrumb trail: 'WinCapWeb > BOCES_Services > My District Profile > Service_Requests'. Below this is a 'Filter Data' section with the following fields:

- 'Search For:' with a text input field and an 'in:' dropdown menu labeled '[All fields listed in dropdown]'.
- 'Purchase Status:' with a dropdown menu set to '[Any]'.
- 'Contract Status:' with a dropdown menu set to '[Any]'.

 There are 'Filter' and 'Clear' buttons below these fields. Below the filter section is a header for 'Service Request - final service request' with a 'Go To' button and a search icon. At the bottom, it shows 'Fiscal Year: 2013 | Customer: CITY SD' and a pagination bar with '1-25 of 48' and 'First | Previous | Next | Last' links. Two yellow arrows on the left point to the 'Purchase Status' and 'Contract Status' dropdown menus.

Purchase Status

- Yes – everything you have checked as “Yes”
- No – everything you have checked as “No”
- Yes or No – everything that has been checked either “Yes or “No”
- Unspecified – everything where no selection of “Yes or “No” has been indicated
- Yes or Unspecified – everything that has been checked “Yes” plus everything that is unspecified
- No or Unspecified – everything that has been checked “No” plus everything that is unspecified

Contract Status - the only choice that is applicable for this year is:

- Proposed (2012-13) contract >0 – Displays the services for the proposed fiscal year that have any amount greater than zero

Once you have verified all services, you must be sure to click “update” to save all of your changes.

Step Two: Finalization: Finalization simply sets all services with a zero contract amount to “No”, including any cross-contract services, that you have not checked and have a zero amount in the “2012-2013 Request” column.

For Finalization go to: *BOCES Services/My District Profile/Service Request Certification* and the dropdown menu below will display.

The screenshot shows the 'Service Request Certification' form in WinCapWeb. The breadcrumb trail is 'WinCapWeb > BOCES_Services > My District Profile > Service Request Certification'. The form has a 'Select Data' section with the following fields:

- 'Fiscal Year 2013' (text label)
- 'Customer' dropdown menu set to 'CSD'
- 'Provider' dropdown menu set to 'BOCES'

 There is a 'Query' button below these fields.

Each BOCES will need to be finalized and certified individually.

Using the dropdown list, choose the BOCES that you wish to certify. Only BOCES with linked cross contract services AND open service contract periods will be displayed; all other BOCES services will be finalized/certified under Eastern Suffolk BOCES.

After selecting the Provider BOCES and selecting "Query", the user will be directed to the Service Request form with the additional "Finalize Data" and "Validate and Certify Data" options at the bottom:

Professional Development | Employee Self-Service | **BOCES Services**

WinCapWeb > BOCES Services > My District Profile > Service Request Certification

Service Request

Filter Data
 Search For: in: [All fields listed in dropdown]
 Purchase Status: [Any]
 Contract Status: [Any]
 Requires Response (0)

Service Request - Final Commitment

Fiscal Year: 2013 | Customer: CSD 1-10 of 1534 First Previous Next Last

Service Code	Provider Code	Service Name	2012-13 Quantity	2012-13 Unit Cost	2012-13 Fixed Cost	2012-13 Cost	2012-13 Request	Fee Notes	Purchase Service	Period End	Action
001.000		Administration	953.0000	159.1600	0.00	151,679.48	151,679.48		Mandated	05/01/2012	<input type="button" value="Print"/>
002.000		Capital and Rental	953.0000	0.0000	0.00	0.00	0.00		Mandated	05/01/2012	<input type="button" value="Print"/>
101.100		State Approved CTE - Albany	6.5000	9,952.0000	0.00	64,688.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	05/01/2012	<input type="button" value="Print"/>
101.110		State App CTE New Visions	0.0000	9,952.0000	0.00	0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	05/01/2012	<input type="button" value="Print"/>
101.200		State Approved CTE - Schohaire	12.0000	9,952.0000	0.00	119,424.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	05/01/2012	<input type="button" value="Print"/>
101.300		CTE Assessment Services	0.0000	0.0000	0.00	0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	05/01/2012	<input type="button" value="Print"/>
102.100		Career Studies - Albany Campus	2.0000	10,995.0000	0.00	21,990.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	05/01/2012	<input type="button" value="Print"/>
102.150		CTE - One to One Aide - Albany	0.0000	0.0000	0.00	0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	05/01/2012	<input type="button" value="Print"/>
102.200		Career Studies - Schoharie Campus	0.0000	10,995.0000	0.00	0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	05/01/2012	<input type="button" value="Print"/>
102.201		CTE - Special Ed - Consultant Srvc	8.0000	1,250.0000	0.00	10,000.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	05/01/2012	<input type="button" value="Print"/>

1-10 of 1534 First Previous Next Last

Total
 2012-13 Requested * \$154,179.48
 2011-12 Current Contract ** \$1,548,182.62

* - Requested Totals may not reflect your most recent screen selections. [\[update totals\]](#)
 ** - The Current Contract Total may differ from your most recent BOCES Contract Invoice since some services may have been discontinued or offered under new services

Manage Cross Contract detail
 Cross Contract detail records must be loaded from the Provider BOCES before making changes.
 To Display Cross Contract detail records, use the [Load all Cross Contract detail] button here to load data from all Provider BOCES, or Click the [Manage Cross Contract Detail] action in the table above to load detail for a specific provider.

Finalize Data
 Clicking Finalize will set the Purchase Service field to no for current screen selections where no Purchase Service selection has been made.

Validate and Certify data
 After making updates to Services/Subservices above, use the Update button to validate and save data.

Before proceeding to finalizing your request, you must update your data one last time. You do this by clicking on the "Update Without Certify" button.

Once your final updating is complete, you can click the "Finalize" button. A pop-up message will appear to alert the user that all services that have not been specified as "Yes" or "No" will be mass verified as "No":

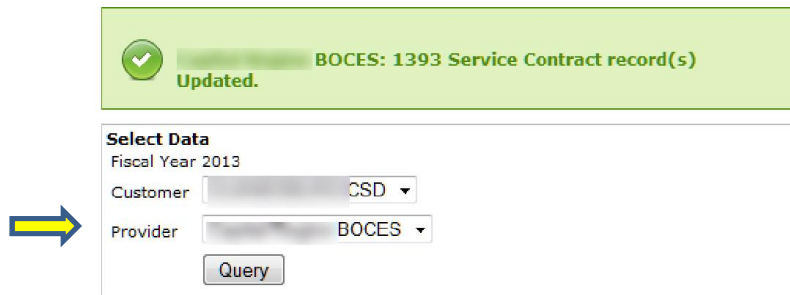
I understand that all Services that have not been designated under the Purchase Service column as "yes" or "no" will be verified under my user name as "no".

Clicking “OK” will then set all unverified services as “No” and will return the update message:



The screenshot shows a green notification box at the top with a checkmark icon and the text "BOCES: 1393 Service Contract record(s) Updated." Below this is a "Select Data" form with the following fields: "Fiscal Year 2013", "Customer" (dropdown menu showing "CSD"), "Provider" (dropdown menu showing "BOCES"), and a "Query" button.

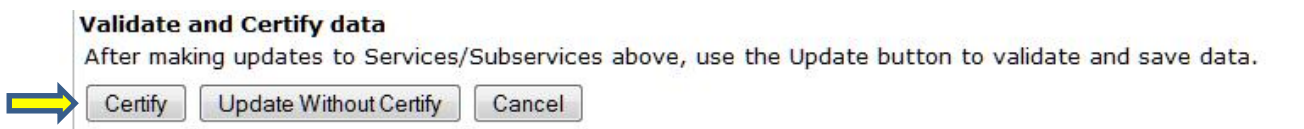
This step will need to be completed for each BOCES that the district purchases cross contract services from on the final service request form. Use the drop down menu to repeat the step for each BOCES.



This screenshot is identical to the one above, but includes a yellow arrow pointing to the "Provider" dropdown menu, which is currently set to "BOCES".

Step 3: Certification: The last step in completing the Final Service Request submission is the Certification.

Once certification is complete, you will no longer be able to make any more updates to your service request. Future updates will need to be completed via the contract modification process.



The screenshot shows a dialog box titled "Validate and Certify data" with the instruction: "After making updates to Services/Subservices above, use the Update button to validate and save data." Below the text are three buttons: "Certify", "Update Without Certify", and "Cancel". A yellow arrow points to the "Certify" button.

To certify, select the “Certify” option. If there are records that are not finalized, a message will display to indicate that the finalization step needs to be completed:



If all services have been finalized, then the certification process can proceed. The Service Request Certification box will appear prompting the user to enter their password to complete the certification:



By certifying the Service Request, the district is closing the Service Request portal and will be unable to make further changes to their Service Requests.

Again, the Certification step will need to be completed for each BOCES that the district purchases cross contract services from on the final service request form.