



Y7 Application Instructions

Office of Religious & Independent School Support
(ORISS)

Academic Intervention Services
(AIS) Grant

Grant Summary

The Academic Intervention Services (AIS) Grant summary can be found [here](#).

Purpose

The purpose of the Academic Intervention Services (AIS) professional development grant is to raise the proficiency of Religious & Independent (R&I) schoolteachers in specific techniques to support students who are at risk of not meeting the New York State (NYS) administered 3-8 assessments in either English Language Arts (ELA) and/or mathematics.

Statute

The AIS program is a state-funded grant based on [Commissioner's Regulations 100.2](#).

Eligibility: Institutions

Eligibility has been pre-determined based on New York State Education Department (NYSED) data. The criteria for pre-determination include:

1. Currently open/operational (at the time of application)
2. Religious and Independent schools (non-profit or not-for-profit schools only)
3. Possession of (or will obtain) a valid Office of the State (OSC) Vendor ID.
4. The New York State Education Department (NYSED) issued Basic Education Data System (BEDS) code.
5. BEDS enrollment data for the 2021-2022.
6. Offered the 3-

Getting Started

This section takes the applicant through the checks and balances required to successfully file a claim. The information listed in the school's State Education Data Reference File, or [SEDREF](#), must be accurate to process an AIS claim.

Leadership Designation

- An institution's [SEDREF](#) file will contain a Chief Executive Officer (CEO) and an additional contact/Chief Financial Officer (CFO).
- Both the CEO and the additional contact/CFO must keep a current email in their [SEDREF](#) file. The emails on file receive all NYSED religious and/or independent school announcements.
- ORISS also recommends checking for weekly updates on the ORISS website.
- If information in the [SEDREF](#) file is outdated or inaccurate, it is the school's responsibility to notify SEDREF. See below for how to make changes.

Leadership Changes

only user that can manage SEDREF Profile/SEDDAS accounts.

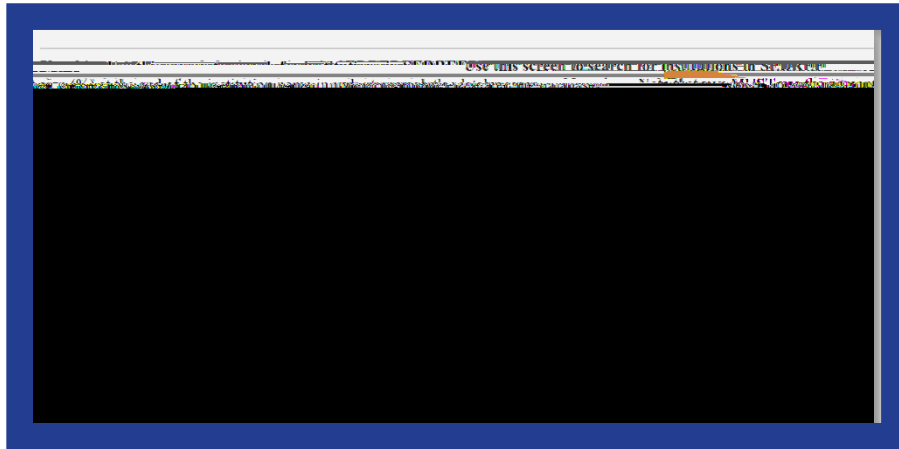
- To change CEO/CFO information, please contact datasupport@nysed.gov to update the information.
- To change the CFO5 (pptk)-1.1 (e.6 0.95,[o0mEMC ET/LBopO2Tw 180BD7>1 <00264 <00284e

NYSED Business Portal Log On

1. Enter the [NYSED Business Portal](#) (the sign-on page below will be displayed).
2. If the CEO and CFO listings are correct in [SEDREF](#), enter **Username & Password** (contact [SEDDAS](#) for email & password help) and Click **Sign In**.
3. If your CE and CI li1-1 (t)-3 (i)1 (ngs)-1 (ar)-3 (e c)-1(ngs)- (or)-3 (r)-3 (ec)-1 (t)-3 (i)Ji

Upon entering **SEDREF**, the user will need to:

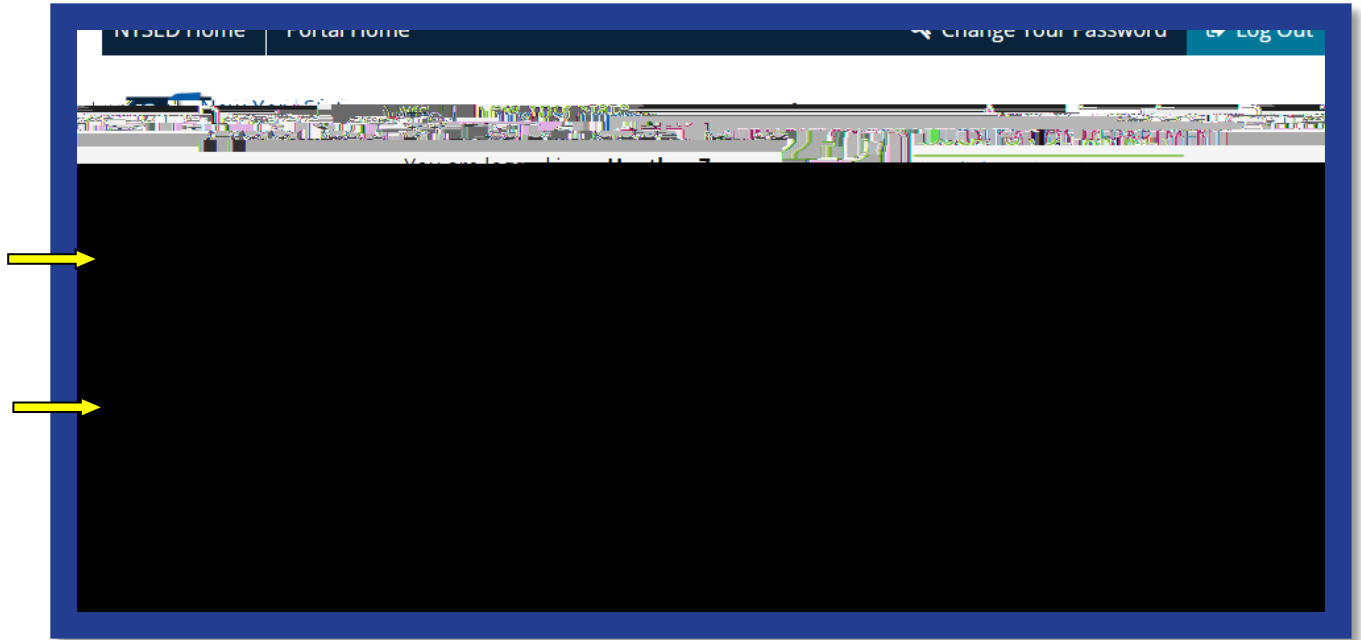
- ONLY enter the school's **Name** (followed by "%") **OR** only enter the school's **SED/BEDs Code**. (No further information is required to complete a search.) Then, click **Find**.



- A school's Institution ID will be located on the top line of the Institution Data screen.
- The Payee Information will be found under the OSC Vendor ID and the Payee's Name is located near the bottom of the data chart as indicated below.

The applicant can then:

- Record the school's **Institutional ID**, **Payee Name**, and **OSC Vendor ID**.
- Close the **SEDREF** tab.
-



Groundwork

Groundwork: Internet Browser

Firefox or Google Chrome are the preferred browsers for completing the AIS Claim Application on the NYSED Business Portal.

Groundwork: Data Entry Selection

1. Enter the school's **Inst ID**.
2. If you do not know your school's **Inst ID** number, please visit the **Institution & Payee Information** section of this document (pages 6 & 7).
3. Click **Select Institution**.

Groundwork: Vendor ID Error

This message indicates that NYSED does not have **Payee Information** on file for your institution. The institution will need to complete the [Payee form](#).

1. Please complete the form and **mail it** to the address below.

*NYS Education Department/ORISS
89 Washington Avenue Room 1076 EBA
Albany, NY 12234*

Note: These are federal forms and a hard copy with an original signature is required to be on file. Once received, we will process the information and be able to process the information.
T.06 577.ID 6 2.28 0 Td[Tc 0.0)v-1 (e)api 1mBDC .o6 101 Tc 0eba40 BDC:(m)-nh.o4.4 Tm[r

Groundwork: Edit

Selecting **Edit** will bring you to the Claim Home Screen. This screen will contain:

- School's Name
- Institution ID/ SEDREF ID
- SED Code
- Vendor Id
- Y7 Grant Allocation information (no rollover will be listed)

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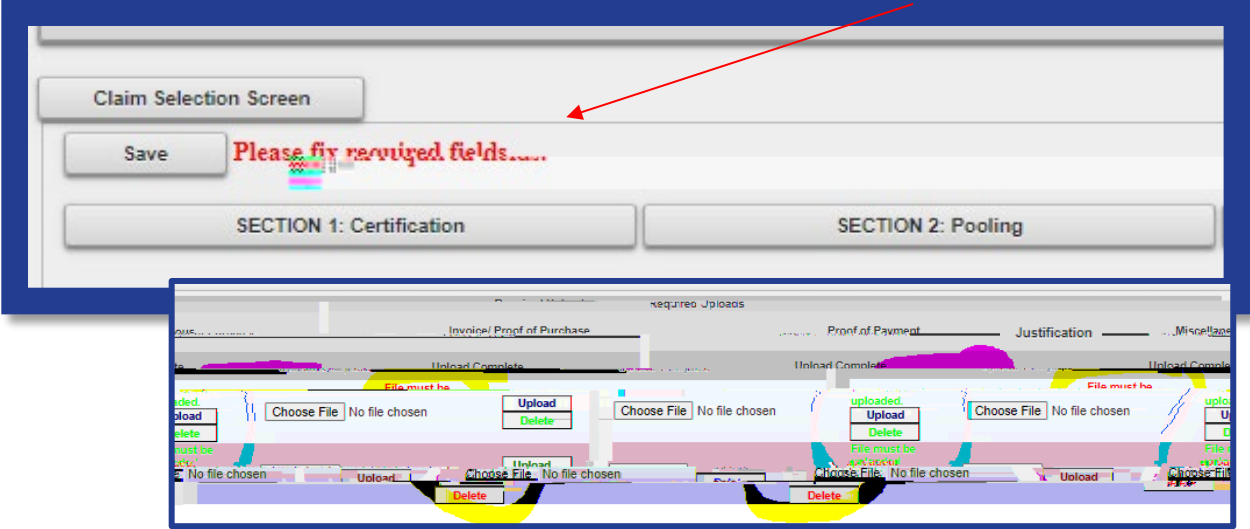
The Claim Home Screen includes the following claim sections:

- SECTION 1: Certification
- SECTION 2: Pooling

Groundwork: Troubleshooting

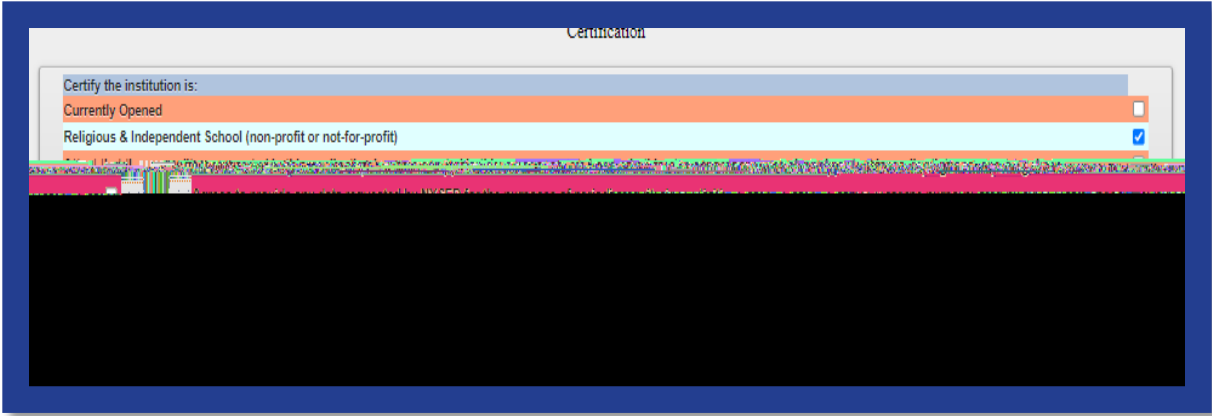
Incomplete Sections/Errors

If there are any incomplete sections, an error message may appear. The applicant may correct the incomplete sections by continuing to **Edit** the claim or **Save** and **Edit** at another time.



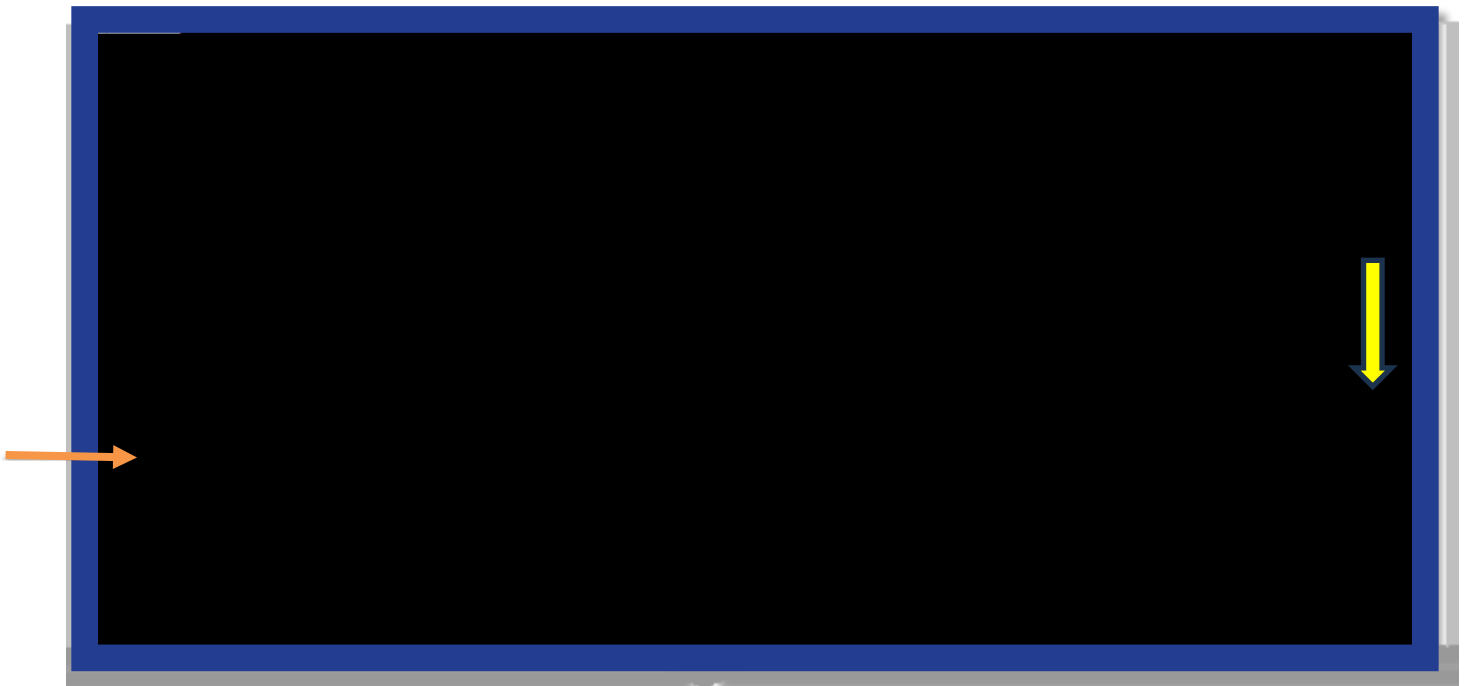
Incomplete Application/Flagged Data

A snapshot of all missing data is flagged in the application home screen. Please see the orange highlights for example.



Section 1: Certification

1. Click **Section 1: Certification**.
2. Read each of the certification items.
3. Complete and certify by checking the boxes on the far right.
4. Certification is required to submit a claim.
5. Don't lose all your work. Click "Save" now.
6. To close this section, click the **SECTION 1: Certification** button again.
7. The applicant may now select another section of the application.



Section 2: Pooling

Section 2: What is Pooling?

Pooling of funds is used when related agencies have collaborative items/services and wish to combine their allocations into one claim. Pooling is optional and most schools do not participate in pooling.

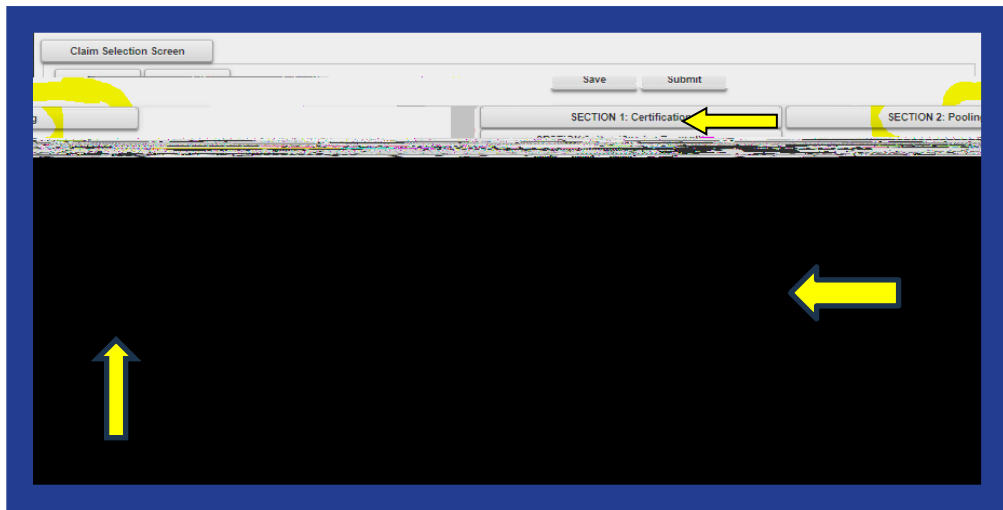
Section 2: Who can Pool?

Only eligible schools may elect to pool. To share funds with a consortium, a diocese, or another provider, the institutions must share the same **Payee Information (OSC Vendor ID & Payee Name on SEDREF)**. If you do not know your school's **Payee**

Information, please visit the **Groundwork** section of this document for further instructions.

Section 2: Opt In/Out Pooling

1. Click the **Section 2: Pooling** button.
2. Select **YES** to pool funds **OR** select **NO** to not pool funds. Selection is required to submit a claim.
3. If selecting **NO**, click the “No” button and move to step 8 of this section.
4. If selecting **YES**, click the “Yes” button and complete the rest of the **Section 2: Pooling (required)**.
5. Each pooling school (and affiliated BEDS code) must submit an individual application.
6. Each pooling school must upload a completed **Y7 AIS Pooling Application** found on the [AIS Guidance & Resource Documents webpage](#).
7. Don't lose all your work. Click “Save” now.
8. To close this section, click the **SECTION 2: Pooling** button again.
9. The applicant may now select another section of the application.



Section 3: Item/Service Expenditures

Section 3: Preparation

Confirm Eligibility

See the **AIS Y7 Guidance** and **AIS Y7 Expense List** found on the [Guidance & Resources webpage](#) for further information on eligible Items/Service Expenditures. **Year 7 would include unclaimed eligible expenses made through June 30, 2024.**

Determine Invoices Categories

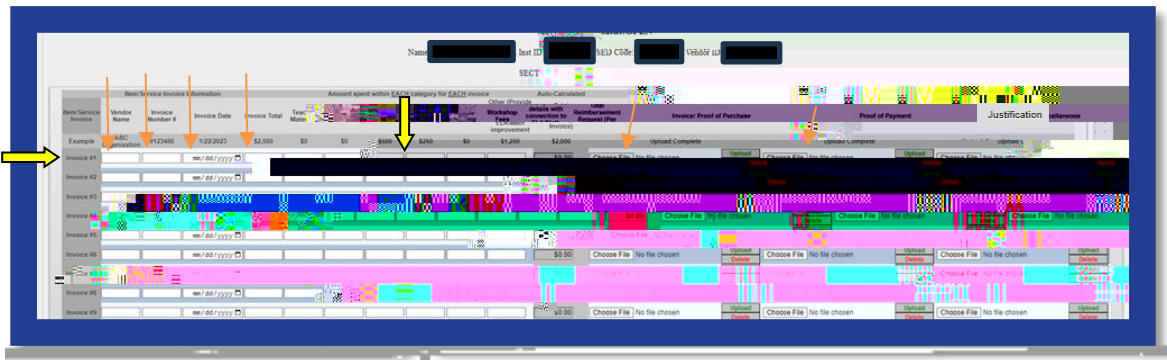
To allow for a smooth and efficient application process, gather your documents in advance and determine which spending categories are applicable. There are six categories for the types of professional development and instructional material expenditures for the **Items/Service Expenditures**. Please note that one invoice can cover more than one category. But generally, each invoice will have its own category. Invoices can also be combined by vendor.

Section 3: Open & Add Data

1. Click **Section 3: Item/Service Expenditures**
2. For each invoice, enter the requested invoice information.
3. Enter payment amount(s). Be sure to delineate the payment amounts by category. If you are unsure, please reference the **AIS Y7 Expense List**

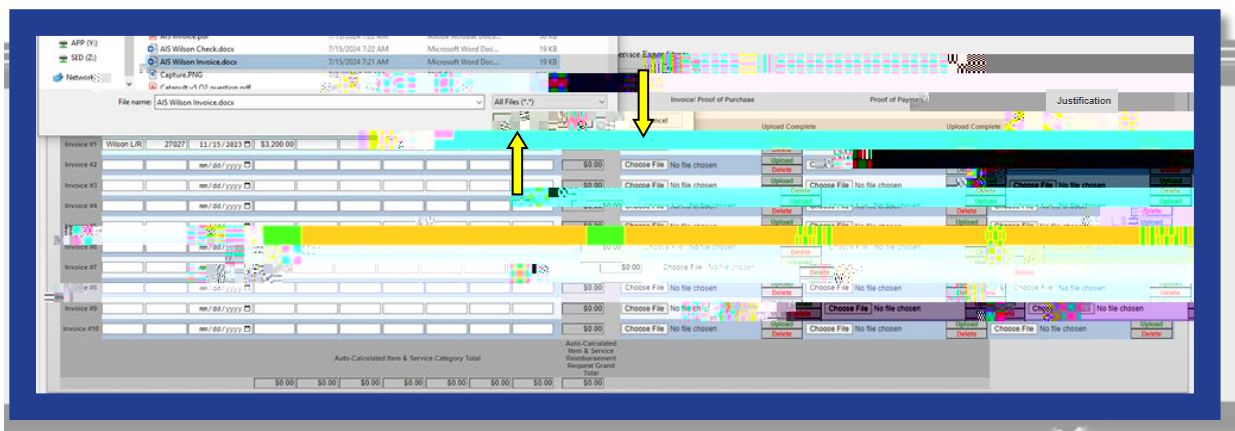
represents a different vendor. If the same vendor is listed on Lines #1-19, work with the vendor to isolate the AIS-related costs for the Y7 eligibility period and combine invoices. Invoices can be combined by vendor using the earliest invoice date and number to complete the line information.

5. Applicants with more than 20 Invoices/Vendors, should:
 - a. access the **Y7 Additional Invoice Instructions** and complete the **Y7 Additional Invoice Workbook** found on the [Guidance & Resource Documents webpage](#).
 - b. Complete Portal Invoice Line #20 using the following data:
 - Vendor Name: Additional Form
 - Invoice Number #:123456
 - Invoice Date: 6/30/24
 - Invoice Total: enter the actual total of additional invoices – subtotals can be broken out by category.
 - Be sure to upload the corresponding master documents.



Section 3: Upload Proof of Purchase

6. Select *Choose File* in the Invoice/Proof of Purchase column of the claim form.
7. Select the appropriate file from your saved documents (Word, pdf, Excel & jpg).



3. An uploaded file will be listed next to **Choose File**. See below.

4. After the file name is listed, click on **Upload** as shown below. This will change the file name to an active link to view the document.

Section 3: Upload Proof of Payment

1. Select **Choose File** in the **Proof of Payment** column of the claim form.
- 2.

1. Please name the documents accordingly so that it is clear to the Reviewer what the documents relate to.
2. These items would be uploaded similarly to proof of purchase and proof of payment. See the instructions in these sections.
3. Don't lose all your work. Click "Save" now.
4. To close this section, click the **SECTION 3: Item/Service Expenditures** button again.
5. The applicant may now select another section of the application.

Section 3: Upload Error Message

Proof of Purchase, Proof of Payment, and Justification are required. If files are not uploaded for each invoice, an error message will appear. In the example shown below, both the proof of purchase and proof of payment documents are missing for line #9.

Missing information will need to be added in order to submit a claim. Once corrected, the SUBMIT button will reappear.

The screenshot displays the 'SECTION 3: Item/Service Expenditures' interface. At the top, a 'Save' button is highlighted with a yellow arrow and the text 'Please fix required fields'. Below this, a table lists various service invoices. The table columns include Invoice #, Vendor Name, Invoice Number, Invoice Date, Invoice Total, and various expenditure categories. The 'Required Uploads' section for each invoice lists 'Invoice Proof of Purchase', 'Proof of Payment', and 'Justification'. For invoice #9, the 'Invoice Proof of Purchase' and 'Proof of Payment' fields are highlighted in red, indicating missing files. Two yellow arrows point to the 'Upload' buttons for these missing files. At the bottom of the table, a summary row shows totals for each category, and a 'SUBMIT' button is visible at the bottom right.

Invoice #	Vendor Name	Invoice Number	Invoice Date	Invoice Total	Teacher Materials	Student Materials	Software Materials	In-Class Coaching	Workshop Fees	Other Funds	Other Funds with ELC&M Improvement	Total Reimbursement Requested (Per Invoice)	Invoice Proof of Purchase	Proof of Payment	Justification				
Example	ABC Organization	#123456	1/22/2022	\$2,500.00	\$0.00	\$0.00	\$500.00	\$200.00	\$0.00	\$1,200.00	\$0.00	\$2,700.00	Upload Complete	Upload Complete	Upload Complete				
Invoice #1	Wilson LLC	27827	08/15/2023	\$3,200.00								\$3,200.00	Choose File	No file chosen	Choose File				
Invoice #2	Journals Inc	3223	09/05/2023	\$800.00								\$800.00	Choose File	No file chosen	Choose File				
Invoice #3	Mine LLC	133	09/15/2024	\$5,000.00								\$4,200.00	Choose File	No file chosen	Choose File				
Invoice #4	FD Co	7456	01/11/2024	\$2,700.00								\$2,900.00	Choose File	No file chosen	Choose File				
Invoice #5	Workshop S	874	02/02/2024	\$2,200.00								\$950.00	Choose File	No file chosen	Choose File				
Invoice #6	Math Man	123	02/10/2024	\$500.00								\$500.00	Choose File	No file chosen	Choose File				
Invoice #7	Geneco	793	08/26/2023	\$300.00								\$300.00	Choose File	No file chosen	Choose File				
Invoice #8	Students	27	02/09/2024	\$4,200.00								\$4,200.00	Choose File	No file chosen	Choose File				
Invoice #9	Software	899	12/15/2023	\$999.99								\$750.00	Choose File	No file chosen	Choose File				
Invoice #10	Connect	450	04/15/2024	\$100.00								\$100.00	Choose File	No file chosen	Choose File				
				Auto-Calculated Item 8, Service Category									\$20,100.00	\$4,200.00	\$5,250.00	\$2,000.00	\$950.00	\$450.00	\$14,800.00

Submission & Reimbursement

Please visit the [NYSED Business Portal](#) section of this document to access the submission portal. Submission of the AIS application by utilizing the Business Portal is highly encouraged. This web-based system improves the quality of submissions: decreasing the need for follow up communication, increasing efficiency of the claims process and reimbursement.

Please visit the [AIS Guidance & Resources](#) page to obtain the Non-Portal Application and Workbook.

Submitting via the Portal Application

Upon submitting a completed portal application, the AIS claim will go into **HOLD** status.

Please see the Groundwork: Claim Status Definitions section on page 6 for further information on statuses. **You will not receive confirmation of submission other than the status change.** If your claim is in **HOLD status**, it has been submitted and will be reviewed in the order received. During the review process, AIS-ORISS will reach out with any questions to the contact on-file for your school in SEDREF.

Submitting the Non-Portal Application

All non-portal applications should be submitted to the [AIS-](#)

Direct Deposit

Your institution should access the Statewide Financial System (SFS) Help Desk and confirm that ACH is selected as the preferred method of payment:

1. Navigate to the Location tab on the vendor record.
2. Select the “Payables” hyperlink.
3. The payment method is displayed under the “Additional Payables Options,” “Additional Payment Information” section.
4. If the Payment Method is ACH, the payment will be made via ACH.

Schools wanting to complete/update ACH should contact the SFS Help Desk at: helpdesk@sfs.ny.gov, toll-free (877) 737-4185, or (518) 457-7737.

Resources

AIS Y7 Grant Solicitation Notice

AIS Y7 Grant Overview

AIS Y7 Guidance

AIS Y7 School Allocations

AIS Y7 Expense List

AIS Y7 Pooling

AIS Y7 Q & A

AIS Y7 Non-Portal Application Instructions

AIS Y7 Non-Portal Workbook