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FAMIS FAQs

FREQUENTLY ASKED QUESTIONS

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To get help or obtain explanations on error messages not covered in this FAQ please contact the FAMIS Security Unit by sending an e-mail to FAMIS@schools.nyc.gov.

FAMIS Frequently Asked Questions, Answered:

1 What does the acronym FAMIS stand for?

FAMIS stands for Financial Accounting Management Information System

A. User IDs and Passwords

1. What is a User ID?

- ☞ A User ID is generally the first initial of your first name and the first 6 letters of your last name. There may be exceptions. If there are other users with similar IDs, your ID may end with a number or possibly an additional letter of your name, example: ABROWNE, ABROWN2, ABROWNE2

2. How do I get a User ID?

- ☞ If you've never had a FAMIS, EIS or ATS User ID you are required to complete a "[FAMIS User ID Request](#)" form.
- ☞ Schools should forward the completed form to their designated **ISC/CFN Security Officer** for processing.
- ☞ Central Offices and ISC/CFN Staff should forward the completed form by fax to (718) 935-5329.

3. What is a valid Password?

- ☞ A valid FAMIS password consists of between 6 and 8 alphanumeric characters. Use a series of characters that are simple and easy to remember but difficult for someone else to guess. Password must contain at least 1 numeric character. *(Special characters such as #, @, & :-) can be used for extra security but are not required at this time)*
- ☞ A password can only be used once within a 12 month period, if you try to use a password you have used within 12 months your password will not be accepted.
- ☞ **Note:** You should log in to the system every 45 days to keep from getting revoked. Passwords expire after 90 days of inactivity.

4. How do I change my password?

- ☞ After you enter your User ID, enter the existing password first and then click on "**Change Password**". Now you will see two blank boxes appear, "**New Password**" and "**Confirm**". Type in a new password (6-8 characters and must include at least 1 numeric character). Retype the password in the confirm box and click on "**sign in**".
- ☞ **REMEMBER**.....you cannot repeat passwords you have used in the past year.

5. What is a PIN?

- ☞ The PIN is a Personal Identification Number. The PIN, which is usually your Mother's Maiden name, is for security purposes only. It is only requested when a User ID is reset. This is to ensure no one else is utilizing your User ID. It has nothing to do with your password.

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6. **Why do I have more than one User ID?**

- ☞ Due to the many systems that we have access to some users may be subject to multiple User IDs. This may be because of common names already in use by someone else.
- ☞ For those with multiple User IDs, you must keep track of the ID and its usage as well as the password attached to it.
- ☞ If you know you have two id's contact the FAMIS Security Unit to consolidate them and update your information.

7. **How can I update my information?**

- ☞ You can update your profile information in FAMIS by going to the FAMIS home page and clicking on update profile. [click here for more information.](#)

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B. EIS and ATS Systems

1. **Can I use my **EIS** User ID and Password to access FAMIS?**

- ☞ Yes. FAMIS and EIS share the same User ID and also the same password. If you already have access to EIS please ensure you have "**system**" access to FAMIS.
- ☞ Go to the FAMIS Portal site and enter your User ID and current EIS password. If you get a "*Welcome to FAMIS*" message, then the system accepts you. If not, you can call your designated "**ISC/CFN Security Officer**" or you may contact the FAMIS Security Unit at 718-935-3525 to update your status in FAMIS. You can then log onto FAMIS with your EIS User ID and password.
- ☞ **Remember:** when you change passwords, you are changing passwords for both.

2. **Can I use my **ATS** User ID and Password to access FAMIS?**

- ☞ Yes, if you also have "**system**" access to FAMIS. However, because both the FAMIS and ATS systems are in different computer regions their **passwords are maintained independently**. Therefore, if you use the same User ID in both FAMIS and ATS and then change or update the password in one of these systems, the other system will not have the new password. You will then need to be mindful to simultaneously update the passwords in the other system.
- ☞ If you get an error "*User ID is not recognized by the system*" or other messages that indicates it doesn't accept your User ID, call your designated **ISC/CFN Security Officer** or the FAMIS Security Unit at 718-935-3525 to update your status in FAMIS.

C. Access Inquiries

1. **Do I have access to inquiry?**

- ☞ Yes. All users, with access to FAMIS Portal, automatically have the ability to inquire. However, you will only be able to obtain information of the District and Location Code(s) to which you have been given access.

2. **I have access to FAMIS but the information is wrong. How is this information corrected?**
 - ☞ Schools may contact their designated **ISC/CFN Security Officer** or the FAMIS Security Unit. To expedite your request, please specify your **Full Name, User ID and PIN** with all communications.

3. **Why can't I process a SIPP payment?**
 - ☞ You may contact your designated **ISC/CFN Security Officer** or the FAMIS Security Unit to verify what level access you have.
 - ☞ You must be an **Initiator*** to process documents.
 - ☞ If you are an **Approver***, you are able to approve SIPP documents. You can also initiate them, but you need someone else to approve.

This is an internal control that keeps the functions of **requesting and **approving** official on-line financial documents separate. The separation of duties helps to ensure payments are valid and properly authorized and is checked by auditors.*

4. **Why can't I prepare a P-card application for my supervisor?**
 - ☞ P-Card applications can only be prepared by the person responsible for it; that is, school principals or their designees and central office heads or their designees. Additional information on how to apply for a P-Card is available at the following link: [PCardrenewal](#)

5. **Why is my access to FAMIS Portal different from the "green screen"?**
 - ☞ FAMIS Portal is the DOE's innovative accounting and procurement system. Document types and access rules will be different. When accessing information through the WEB, certain security protocols must be in place which will change a user's access.

6. **I am a Principal but it seems that members of my staff have the same or higher levels of access than I do. Why?**
 - ☞ In most cases the Principal is the designated "**Approver**". Principals may contact their ISC/CFN Security Officer or the FAMIS Security Unit to have User IDs adjusted according to the needs of the school.

[D. Navigation/Routing](#)

1. **Why did my Portal screen "Time-out" after 15 minutes?**
 - ☞ The time-out feature is an industry standard requirement to promote security within any web-based application, such as Portal and to help preclude hacking.

Note: If you are within hands' reach of the computer, then any activity like clicking once or hitting the enter key every few minutes will keep the screen active.

2. **What is an "Approval Path"?**
 - ☞ An approval path is the **route** a document must follow to be properly posted.
 - ☞ The Approval Path is determined by the "Initiating Department". Different documents follow different paths for approval. *Example next page...*

Example: A SIPP document under \$500 must be approved by the Principal or other designated person. Over \$500 must follow a path from the Principal (1st level of approval) then onto the ISC/CFN for the final approval.

3. **What is an "Initiating Department"?**

- ☞ The Initiating Department contains the District and Location Code (9900K123). Each time a document is entered an Initiating Department is assigned according to the User ID that is creating the document.
- ☞ A user can see the Initiating Department by looking at the "DST/LOC" box.

4. **I can't find the FAMIS application, how do I access it?**

- ☞ The FAMIS Portal is an online web application that can be accessed from the DOE's website at the following link.
<https://dfoforms.nycenet.edu/FamisPortal/login.aspx?>

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E. Approval

1. **What is a Signature and how do I create one?**

- ☞ Signatures only apply to "**Approvers**". When approving a transaction (SIPP, Purchase Orders, etc) FAMIS will request a "Signature". The Signature must be entered to complete the approval or rejection process.
- ☞ A Signature is created from the "**Approval Box**" located on your FAMIS Portal menu. In the Approval Box, you will find a box in the upper left hand portion of the screen, "**Sign Here**". If you need to create a Signature, click on "sign", then wait for a second blank box to appear. Enter a word that you will not forget and click on "Update". You will be asked to re-enter the signature and click on UPDATE again. A message will appear "**New signature successfully set**".

NOTE: A signature is NOT a password, it should NEVER be the same as a password and it NEVER needs to be changed.

2. **I forgot my Signature. What should I do?**

- ☞ If you forgot your signature or wish to change it, you need to ask for a **Signature reset**. This can only be requested from a FAMIS Security Officer.

3. **My Signature was reset. How do I set up a new one?**

- ☞ If your Signature was RESET to "**USERID**" you will see a message: "Please enter old signature and click update button". Enter USERID as the old signature and click on "Update".
- ☞ Enter a name, word or anything that you will not forget and click on UPDATE again. You will be asked to re-enter the signature and click on UPDATE one more time. A message will appear "**New signature successfully set**".

4. **I am an Approver, why can't I see documents in my approval box?**

- ☞ You may not have the proper access to the "**Initiating Department**" the document originated from or you may not have been designated as an Approver in FAMIS. Ask your ISC/CFN or FAMIS Security Officer to examine your security profile and provide you with proper access.

NOTE: You should verify that you have been designated as an Approver.

5. I have been designated as an Approver at more than one location. The documents waiting for approval do not appear in the Approval Box. Why?

- ☞ Look for a box call "DST/LOC" located on the same line as "SIGN". Activate the drop down menu by clicking on the black arrow. Now choose the correct "Initiating Department" and click on GO on the far right of the same line.

NOTE: This procedure only applies to approvers who have been given access to multiple locations.

6. What is the electronic approval process for Principal reimbursements?

- ☞ This enhancement effective October 3, 2007 replaced the traditional hard copy approval previously used by Superintendents.
- ☞ School initiators must enter the SIPP payment on behalf of the Principal. Any financial errors will be re-directed to the initiator for the appropriate corrective action and must be re-submitted before payment can be posted.
- ☞ Superintendents will have the option to approve or disapprove.
- ☞ An electronic approval request will be automatically generated and sent to the Superintendent.
- ☞ Reimbursements above \$500 will require that documentation be submitted to the ISC/CFN.

To view the Principals Weekly article go to:

<http://schools.nyc.gov/NR/rdonlyres/7553A99F-CC4B-4106-A820-539F72D762E5/0/PWEnhOnlinePSReqSysPrinc.pdf>

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F. Resolution of Error Messages

1. I have noticed unexplained messages when I try to log onto Portal. What can I do?

- ☞ You need to clear you cache.
- ☞ Locate "TOOLS" on your Internet Explorer. Go to "Internet Options".
- ☞ Delete Cookies, and Delete Files including offline content
- ☞ Click on "Settings". Under "Check for newer versions of stored pages", be sure that "Every visit to this page." is marked. Click on OK.
- ☞ If you are still unable to log on, contact the FAMIS Security Unit for assistance.

2. I have been using FAMIS for a long time. When I sign on a message appeared: "The user does not have access to FAMIS Production region". What happened to my access?

- ☞ You have not lost your access. The most common reasons why this message may appear are either:
 - ✓ You have not logged onto the system for at least 90 days and your User ID needs to be reset.
 - ✓ You were logging onto FAMIS Portal when the servers were down – Contact your ISC/CFN or the FAMIS Security Unit

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3. **I received a message that my user id was revoked, how do I get it reset?**

- ☞ If your user id has been revoked you need to ask for a reset.
 1. Schools should contact their local ISC/CFN Security Officer.
 2. Non Public Schools should call 718-935-2123
 3. General Help Desk (718) 935-5100
 4. ISC/CFN & Central users should contact the FAMIS Security Unit.
 5. You must provide your user id and pin for security verification.
- ☞ After you have been reset you will use your **User ID** as your temporary password. Enter your User ID once and then enter a new password.
- ☞ Remember passwords are 6-8 characters, must include at least one number and cannot be a word you have used in the past year. [See password rules.](#)

4. **I received the F607 error message – “Unallocated Budget Exceeded”, when encumbering in the FAMIS Portal.**

- ☞ When schools encumber funds in the FAMIS Portal, they should check the fund availability at the District, Quick, Object, Location & Activity level. There is a secondary check to ensure that there is enough funding in the overall District/Object level, which is the roll-up of all schools in the same district that have funds in the same object code.
- ☞ First verify the proper amount to be allocated. If it is correct, you should check the 'Budget Plan'.
 1. Screen 6451 - Budget Plan Inquiry
 2. Screen 6270 - Budget Control Inquiry
- ☞ If schools reduce budgets on the same day that they encumber funds in the FAMIS Portal, potentially encumbrances and possibly expenditures occur where there is no spending plan (Galaxy budget).
- ☞ ISC/CFN(s) should research the negative balances via the FAMIS Spending Plan Inquiry, by first indicating the district, quick and major object codes. Once the school(s) with the deficit is identified, ISC/CFN staff can research the budget and commitment transactions to determine the appropriate corrective action.
- ☞ Any school with a negative balance needs to be addressed in order for all schools utilizing the account to have access to their funds.
- ☞ Corrective action must be taken as follows:
 - ✓ Funds can be added back to the activity code (if not entirely removed).
 - ✓ A new item can be scheduled to temporarily cover the deficit and/or journal entries.
 - ✓ Expenses can be manually journalized to an account with fund availability.
 - ✓ A change notice must be processed for encumbrances, to an account with fund availability, or the order can be cancelled.

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5. **I receive a message that the “City system is unavailable”.**
 - ☞ When the City’s system is unavailable, error free transactions post in FAMIS once the City’s system resumes. Please refer to the FAMIS Portal Broadcast Screen for further instructions.

6. **I received an error message “The fiscal period is past the location actual end date”.**
 - ☞ There are processing errors that cause FAMIS Portal and Galaxy activity codes to be out of synch. Wait a little while and try again. If the same error occurs contact the FAMIS Security Unit.

7. **I received an unfamiliar error and/or screen that I have never seen.**
 - ☞ If you see an unfamiliar error and/or screen send a screen shot to the FAMIS Security Unit. To capture a screen shot press the “Print Screen” button on your keyboard which is located above the number pad and paste it into the e-mail.

8. **I received the E102 error message; transaction code is blocked. What should I do?**

D E102 FY BLOCKED FOR THIS TYPE OF TRANSACTION

 - ☞ If you are unable to post a document - Contact the FAMIS Security Unit.

9. **Application error system failed to open.**
 - ☞ If you receive errors which include any of the following words send an e-mail including a screen print to the FAMIS Security Unit.
 1. Application error
 2. Failed to execute
 3. .Net error
 4. DNS issues
 5. FWA network
 6. SQL cluster
 7. Host bridge

10. **I receive the message “City Approval Pending”, what does this mean?**
 - ☞ If you received this message on a cross UOA journal entry, please provide a list of vouchers that make up the expenditure you want to move (or credit side/TC 501) and we will request the City’s approval. Send your list of vouchers to Ylam@schools.nyc.gov and allow 3-5 business days for the transaction to be approved.

G. Document Processing

1. **When I inquire on some of my documents I receive the message, “This document was rolled into the next fiscal year. Click here to display the rolled balances.” What does this mean?**
 - a. Every August, the City “rolls” unpaid prior year obligations into the new fiscal year as part of its annual closing to finalize and report on the prior year’s expenditures. Since FAMIS non-payroll transactions are now aligned with the City’s financial system, all prior year open orders, un-liquidated pre-encumbrances and those awaiting contracts must also be “rolled”. In effect, the rolled balances will reduce the amount you’re able to spend in the new year. (Note, in Galaxy you’ll see these balances in your Table of Organization and Allocation Categories as “Last Year Rolled Open Encumbrances” under the “Scheduled” amounts.)
 - b. Your options are as follows:
 - ✓ If you actually received the goods or services for such rolled documents on or before June 30th, certify them and/or ensure payment is made (vouchered) for what was provided;
 - ✓ If you did not receive all or part of the goods or services ensure the rolled document is canceled for that portion. Any remaining balance of a rolled document after vouchering or canceling cannot be reused for other purposes. This is a major reason why it’s important to ensure orders are paid timely during the school year.

Note: *Rolled encumbrance money must be used on the rolled document. If the rolled document is decreased, it can not be used for other purposed.*
2. **How do I cancel/voucher prior year documents?**
 - ☞ To cancel or voucher prior year open documents, go to ‘open document inquiry’, select ‘PY encumbrances’ or ‘PY pre-encumbrances’ under ‘other section’.
3. **I need to find a document for a staff member but I don't have the document # - is there a way to look it up?**
 - ☞ In document status, click on advanced search there you can search by other criteria.
4. **I see my PO in FAMIS but not in Galaxy?**
 - ☞ Verify the object code if it is not correct you can cancel the document and cut a new PO with the correct object code.
5. **Why is my accounting information not updating?**
 - ☞ Clearing your cache can help synchronize current data. Click here for information on clearing your cache.

6. **Why am I now required to enter my delivery address at the beginning of a computer hardware purchase order in FAMIS?**

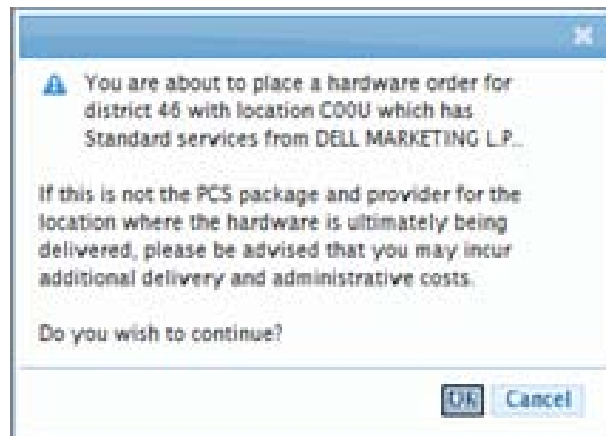
- ☞ Delivery information is now necessary at the beginning of the purchase order transaction, rather than at the end, to ensure the system captures the correct PCS plan and provider for the delivery location. You will need to select the location where the hardware will ultimately reside, which may be different from the ordering site. If the delivery location selected is not the location to which the computer hardware should be sent, you may incur additional shipping costs.

7. **What should I do if the location and address where the hardware is ultimately being delivered does not come up for selection?**

- ☞ If the delivery address does not appear as a selection, please contact the Finance Service Center at 718-935-5000 or Clientservices@schools.nyc.gov.

8. **What should I do if the PCS plan and provider on the text alert box does not match the location where the hardware should be delivered?**

- ☞ If any of the information on the pop-up including location code, PCS plan or the PCS provider is incorrect, click cancel and contact the Finance Service Center at 718-935-5000 or Clientservices@schools.nyc.gov.



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