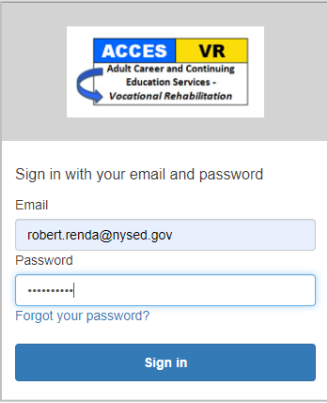
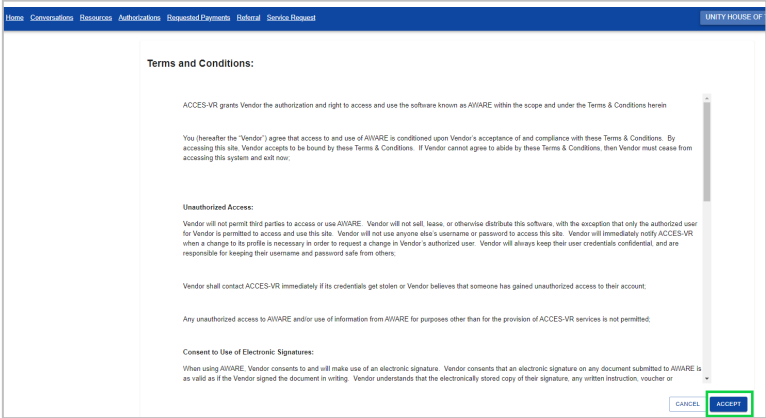


Vendor Portal – Request Payment

The step-by-step instructions below are provided for you to complete the process of a Requesting Payment on an authorization in the Vendor Portal. To display an authorization and Request Payment and review the requested information in the Vendor Portal, you will take the following path:

1. Login to Vendor Portal
2. Display Eligible For Payment Page
3. Select Request Payment
4. Complete the New Vendor Requested Payment Page
5. Submit Payment Request

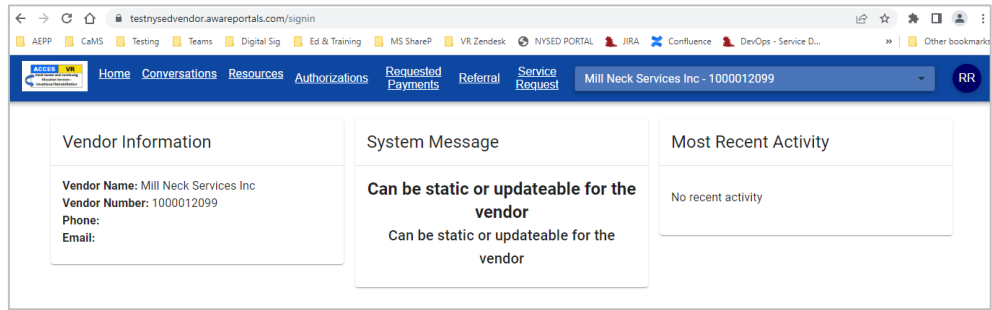
Activity Name	Testing Procedure Notes
Objective 1: Login to Vendor Portal	
1.01 Enter Email	<ul style="list-style-type: none"> • Using a Chrome browser, navigate to the Vendor Portal and enter your Email.
1.02 Enter Password	<ul style="list-style-type: none"> • Enter your Password and click the Sign In button. 
1.03 Terms and Conditions	<ul style="list-style-type: none"> • The Terms and Conditions will display on the main page. Select Accept. 

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Activity Name **Testing Procedure Notes**

1.04 Verify Portal Page Displays

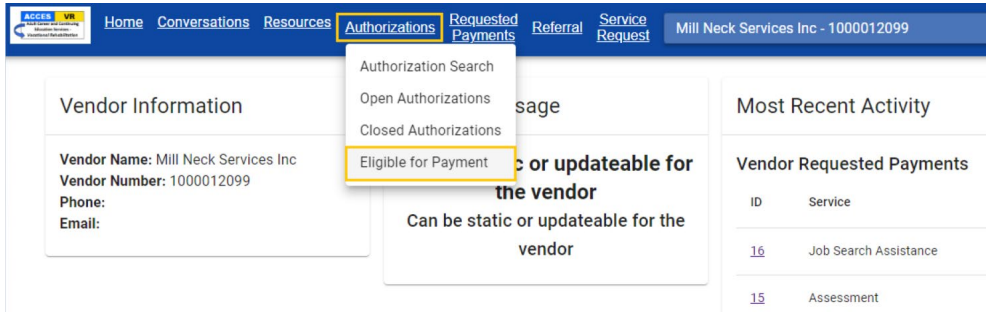
- Verify that the **Vendor Portal** home page displays. Note: as NYSED continues to adapt fields and content, your page may not look exactly like the one shown.



Objective 2: Requesting a Payment

2.01 Display Eligible for Payment Page

- From the main menu along the top of the **Portal** page, click the link for **Authorizations** to display **Authorizations Navigation** items.
- Select **Eligible for Payment** to display the **Authorization Details Eligible For Payment** page and results grid.

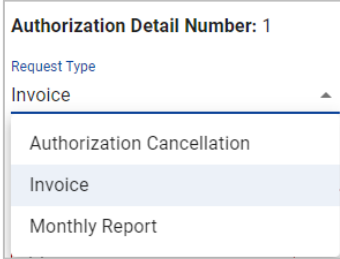
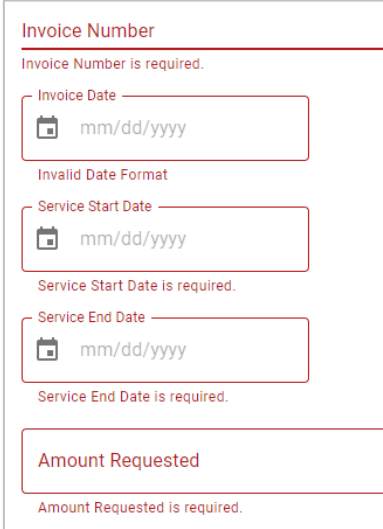
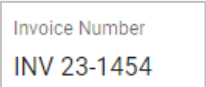



- **Authorization Details Eligible For Payment** page and results grid displays.

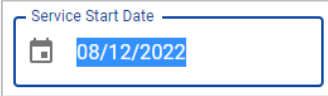
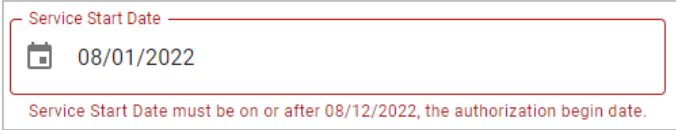
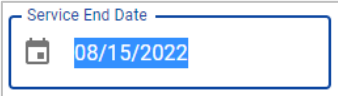
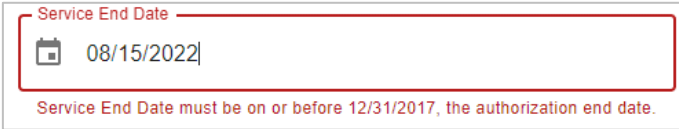
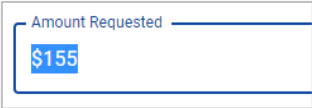
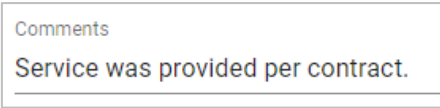
Home / Authorization Details Eligible For Payment

Auth No.	Detail L.	Contract...	Name	Service	Descript...	Amount ...	Current ...	Status	Begin D...	End Date	Actions
C943	1	SED01-C013521-3300200	Valdez, Juan	Assessm...	120X Career Explorat... Assessm...	\$0.00	\$824.00	Open	5/6/2022	8/31/2022	REQUEST PAYMENT
C943	2	SED01-C013521-3300200	Valdez, Juan	Benefits Counsell...	175X Benefits Advisem...	\$0.00	\$54.59	Open	5/6/2022	8/31/2022	REQUEST PAYMENT
C966	1	SED01-C013521-3300200	Cookie, Oreo	Assessm...	112X Commun... Based Workplace Assessm...	\$0.00	\$772.50	Open	5/17/2022	9/30/2022	REQUEST PAYMENT


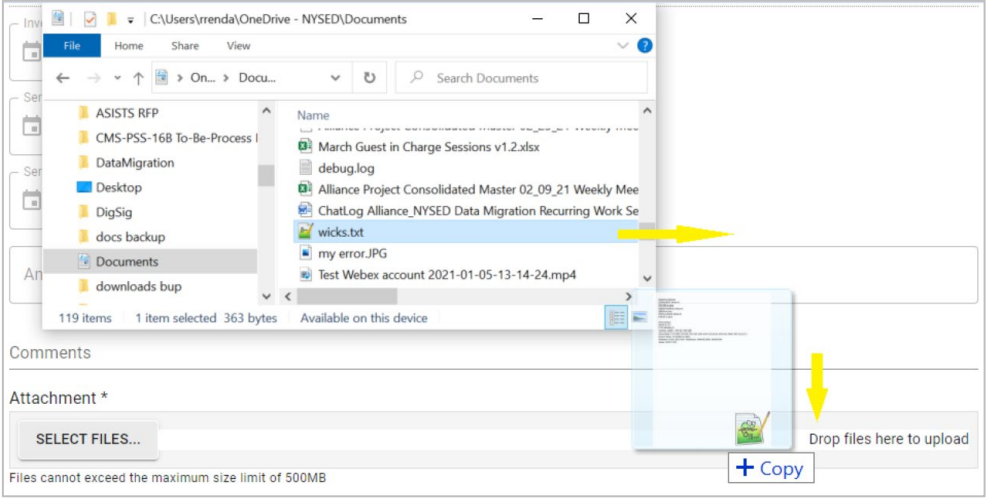
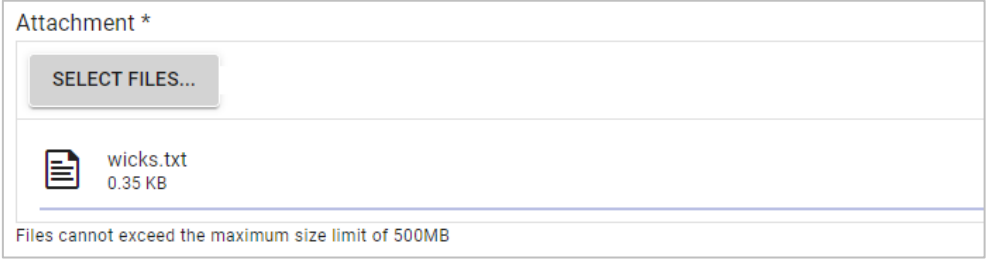
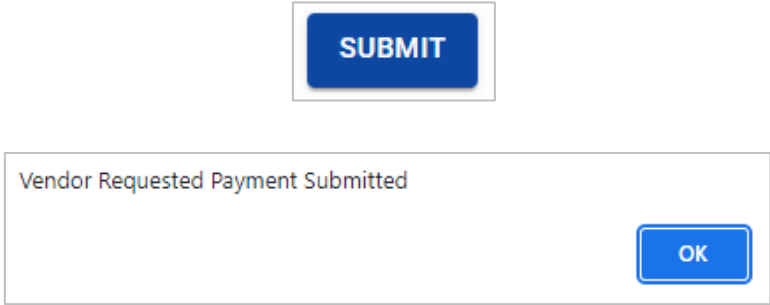
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Activity Name	Testing Procedure Notes
<p>2.03 Select Request Type Invoice</p>	<ul style="list-style-type: none"> On the New Vendor Requested Payment page use the drop-down list to select the value “Invoice” for Request Type.  <p>The screenshot shows a dropdown menu titled 'Request Type' with the following options: 'Invoice' (highlighted), 'Authorization Cancellation', and 'Monthly Report'. Above the dropdown, it says 'Authorization Detail Number: 1'.</p>
<p>2.04 Invoice Number</p>	<ul style="list-style-type: none"> Note: Required Fields became marked in red text when the Request Type of “Invoice” was selected.  <p>The screenshot shows a form with several fields: 'Invoice Number', 'Invoice Date', 'Service Start Date', 'Service End Date', and 'Amount Requested'. Each field has a red border and a red error message below it: 'Invoice Number is required.', 'Invalid Date Format', 'Service Start Date is required.', 'Service End Date is required.', and 'Amount Requested is required.'.</p> <ul style="list-style-type: none"> On the New Vendor Requested Payment page enter text into the field provided for Invoice Number  <p>The screenshot shows an input field labeled 'Invoice Number' with the text 'INV 23-1454' entered.</p>
<p>2.05 Invoice Date</p>	<ul style="list-style-type: none"> Use the calendar widget or enter a date in the field provided for Invoice Date.  <p>The screenshot shows an input field labeled 'Invoice Date' with a calendar icon and the date '08/15/2022' entered.</p>

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Activity Name	Testing Procedure Notes
<p>2.06 Service Start Date</p>	<ul style="list-style-type: none"> Use the calendar widget or enter a date in the field provided for Service Start Date.  <ul style="list-style-type: none"> Note: the system will not allow you to enter a date that precedes the authorization begin date. 
<p>2.07 Service End Date</p>	<ul style="list-style-type: none"> Use the calendar widget or enter a date in the field provided for Service End Date.  <ul style="list-style-type: none"> Note: the system will not allow you to enter a date that precedes the authorization begin date. 
<p>2.08 Amount Requested</p>	<ul style="list-style-type: none"> Enter a dollar amount in the field provided for Amount Requested. 
<p>2.09 Comments</p>	<ul style="list-style-type: none"> Enter text in the field provided for Comments. 

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Activity Name	Testing Procedure Notes
<p>2.10 Attachment</p>	<ul style="list-style-type: none"> In the section for Attachment, you can use the SELECT FILES... button to browse for and choose a file. However, for this test scenario we want to verify that the drag and drop method is working. Open the File Explorer  on your computer and browse for a sample file to test. Drag and drop your file from the location on your computer to the spot provided in the Attachment section. 
<p>2.11 Verify Attachment</p>	<ul style="list-style-type: none"> Verify that the Attachment is listed in that section. 
<p>2.12 Submit Payment Request</p>	<ul style="list-style-type: none"> Select the SUBMIT button and then click OK on the message box at the top of the screen showing indicating Vendor Requested Payment read Submitted. 

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