



**Department of Homelessness and Supportive Housing (HSH)
Contract Management Policies and Procedures
Working with HSH | New Vendor and/or CARBON Access Updates Process**

PURPOSE

Please use this document to do one or more of the following:

1. Ensure you have the information necessary to begin working with HSH and comply with City requirements through the below checklist;
2. Provide necessary information to develop your new agreement *or* update necessary information to an existing agreement (e.g. change in legal entity name, change in authorized signatories); and/or
3. Request new authorization *or* update authorization (e.g. change to who is authorized to submit invoices) for HSH's online invoicing system, Contracts Administration, Reporting, and Billing Online (CARBON).

POLICY

Doing Business with the City

The City has several requirements that agencies must comply with before it can enter into agreements, including that:

- All entities must sign up to be a City Supplier with an assigned City Supplier ID before HSH can do business with the entity;
- All entities that receive federal funding must obtain a DUNS number, and not be on the federal Debarment/Suspended list; and
- All entities must be familiar and be prepared to comply with City requirements, as outlined in the standard agreement boilerplates and appendices.

CARBON

HSH requires that Grantees and Contractors utilize its online invoicing system, CARBON, to submit reimbursement requests and keep contact information up-to-date. CARBON is also used to send important updates regarding agreements and procurement notices, as well as other HSH communications, which is why it is vital to keep this information updated and accurate. Gathering this information in one place, also helps to expedite the agreement process.

Please also note that CARBON invoice submittal access cannot be granted to subcontractors. Only primary Grantees or Contractors will be granted CARBON access.

PROCESS

1. Doing Business with HSH Checklist

For new Grantees and Contractors to be able to enter into an agreement with HSH, please ensure the following tasks have been completed.

	Task	Description and When Required
<input type="checkbox"/>	Obtain City Supplier ID	Before HSH can enter into an agreement with an entity, the entity must obtain a City Supplier ID. For more information on how to obtain an ID, refer to this guide .
<input type="checkbox"/>	Obtain DUNS Number	Per Section 16.23 of a grant agreement, any entity receiving federal funding through an HSH agreement, must obtain a DUNS Number. Visit this website for more information.
<input type="checkbox"/>	Ensure Entity is Not Disbarred/Suspended	For any entity receiving federal funding through an HSH agreement, the entity must not be on the federal debarred/suspension list, as verified through the SAMS database.
<input type="checkbox"/>	Review Boilerplates and Appendices	Before entering into an agreement with HSH, Grantees and Contractors should carefully read the City agreement boilerplate templates: Sample Grant and Sample Contract ; view the Sample Method of Payment Appendix to ensure they can fulfil their agreement obligations.
<input type="checkbox"/>	Review ONE System Requirements	The ONE System is HSH's Homelessness Information Management System (HMIS). Records entered into the ONE system must meet or exceed the ONE System Continuous Data Quality Improvement Process standards: onesf.bitfocus.com/DQ-Improvement .

2. Instructions for New Vendors to Provide Set Up Information/Instructions to Update Agreement Information

To properly set up new Grantees and Contractors, please provide the following information, in a letter of authorization, on your organization’s letterhead with signature from the Executive Director or Financial Officer.

For existing Grantees or Contractors, please update existing information in a letter of authorization on your organization’s letterhead with signature from the Executive Director or Financial Officer.

Legal Entity Name	
Doing Business As Name	
Headquarter Address	
City Vendor ID	
Federal Tax ID	
Federal DUNS Number (if receiving federal funds from any entity)	
Chief Executive Officer Name, Email, and Phone Number	
Chief Financial Officer Name, Email, and Phone Number	
Board Director Name, Email and Phone Number	
Name, Title, Email of Contact Person (this person will be listed in the Agreement)	
Name, Title, Email of Authorized Signatory on the Agreement (if more than one, please provide names, titles and emails of all authorized signatories)	
Name, Title, Email of Assistant/Staff that should be notified upon agreement routing and execution (e.g. Executive Administrative staff)	

Please email a copy of the authorization letter to your assigned HSH Contract Analyst. If you have any questions, please contact your assigned Contract Analyst for assistance.

PROCESS

3. Instructions to Request New Authorization or Update Authorization for HSH's Online Invoicing System

All HSH Grantees and Contractors are required to use the web-based CARBON system for invoicing.

Per City requirements, all Grantees and Contractors who use the CARBON system are required to submit a letter of authorization designating users access to CARBON to electronically submit and sign for invoices, view budget and program reports, and other information in the system.

To properly set up your agreement and ensure it includes accurate information, please include the following, in a letter of authorization, on your organization's letterhead, with signature from the Executive Director or Financial Officer:

- Specify whether a user needs to be **added** or **removed**;
- Indicate user type;
- Provide the name, email, and phone number for each applicable user type, as described below;
- If the change to users is specific to a program agreement, and not applicable to your entire agency, please specify the program name and agreement number in the letter as well;
- Email a copy of the authorization letter to your assigned HSH Contract Analyst; and
- If you have any questions, please contact your assigned Contract Analyst for assistance.

CARBON User Types:

Signatory: The user has full access to the system. They can edit and submit most forms the system. This includes the Budget, all invoices, all program reports. They have read-only access to the Scope of Services form.

Fiscal/Program: Under Contract Documents, this user has read-only access Scope of Services and can edit and submit the Budget form. They cannot update Contract Information form. The user can edit but not submit invoices. They can also edit and submit program reports.

Fiscal: Under Contract Documents, the user can edit and submit the Budget form. They have read-only access to Contract Information and Scope of Services forms. The user can edit but not submit invoices.

Program: Under Contract Documents, the user has read-only access to the Scope of Services page. They cannot edit the Contract Information or Budget forms. The user can edit and submit program reports. The user is unable to view any invoices.

Vendor Viewer: The user has read-only access to all parts of CARBON.