What's new at the Business Services Center (BSC)

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Office of General Services

BSC Objectives

Simplify and standardize processes

Save money

Provide exceptional service

Be a great place to work

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Established September 27, 2012

Finance Updates

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What's New at the BSC

Finance Updates:

- Processing with Recent SFS System Enhancements
- BSC Purchasing Buy Desk
- Excel to CI (Component Interface) Upload Tool
- E-Invoicing
- Maximizing Invoice Discounts
- Best in Class Initiative

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Important SFS System Enhancements

Enhancement	Released	Summary
Email Dispatch	January	PO Processors are able to enter vendor email addresses into SFS and automatically dispatch POs directly from SFS to their email
Contract Discount Terms	January	Contract Discount terms are now automatically passed from the contract to the PO to the Voucher
Systematic scheduling of payment dates	April	SFS will schedule the payment date based on Invoice Receive Date (IRD) and payment terms
More specific category codes on centralized contracts	April	Buyers can now enter more specific category codes on a PO when referencing a centralized contract item
SFS Catalogs	April	SFS Catalogs will be created by the BSC, based on an agency specific contract or a preauthorized/vetted list of items

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BSC Purchasing Buy Desk

Benefits of using the Purchasing Buy Desk

- We offer procurement advice and make recommendations based on research and experience in accordance with NYS rules and regulations.
- We will guide and assist you in obtaining documents that are required for open market purchases.
- We will work with your subject matter experts on conducting solicitations based on contract requirements.

Service Highlights

- Processed approximately 850 requests for Administrative Services.
- Conducting solicitations from the Rubbish Removal contract.
- Reviewing quick quotes for paving services prior to submission into SFS.
- Conducting solicitations for the security guard new contract.

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Accounts Payable Mass Invoice Upload Tool

Background:
- BSC processors manually keyed payment information from Excel spreadsheets provided by agencies into SFS.
- The new Excel to CI Mass Upload Tool in SFS allows the BSC to mass upload payment data directly into SFS.

Benefits:
- Reduction in manual processing decreases the possibility of data entry errors and decreases processing time.
- Work that was previously deemed "out of scope" for certain agencies has now become "in scope", freeing customer agency resources.
- Opportunity for agencies to transition additional work to the BSC.

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E-Invoicing

Background:

- Registered vendors are automatically enrolled in electronic invoicing.
- Vendors can submit electronic invoices through the SFS vendor portal, and SFS builds this vendor data into a SFS voucher.
- SFS will match invoices with associated POs and receipts (if applicable and entered by the agency timely), then routes the invoice for approval and payment.

Benefits:

- Decreased processing time.
- Increased transparency into invoice status for vendors.
- Reduction in manual labor associated with opening, sorting, and scanning mailed invoices.

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Maximizing Invoice Discounts

Background:

- Many contracts and/or vendors allow for discounts for early payment.
- Recent changes in SFS have streamlined the tracking of discounts from contracts to POs to vouchers.
- BSC is prioritizing work to maximize these discounts on behalf our agencies.

Benefits:

- Full realization of discounts included in contracts.
- Agency appropriations and contracts are stretched further as expended amounts are less.

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Best in Class Initiative

The BSC is working with our customers in OGS Finance and OGS HR to evaluate current practices and develop best in class standards for Finance and HR transaction submission and processing.

Path to Best in Class:

1. Develop best in class standards and practices.
2. Create new on-demand training, workshop offerings, and online self-serve documents to ensure all agency staff are well-versed in best practices.
3. Create reporting that will help track and evaluate adherence to best practices.
4. Ensure compliance with best in class practices.

Best in Class: Expense Report Timeline

Best in Class Timeline in Business Days

Day in Process	Days to Complete	Activity
0	0	Traveler concludes travel
10	10	Traveler enters expenses in SFS
12	2	Supervisor Approves in SFS
13	1	OGS Finance Approves
18	5	BSC Audits / Approves
19	1	OSC Makes Payment

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Best in Class: Travel Practices

- Travel cards should be used for all travel expenses whenever possible.

- Travelers should reconcile charges within 10 days of travel.

- Supervisors should approve expense reports within 2 days of receipt.

- Monthly emails are sent to cardholders and their supervisors with outstanding charges over 30 days old. Finance and Credit Card Liaisons are sent a monthly list of all unreconciled charges over 30 days old.

- Travel card charges should be reconciled prior to an employee leaving the agency.

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BSC Training for Travelers

- Travel training covers both SFS processes and travel rules and regulations. All BSC travel classes are listed on the BSC website.

- All travelers and their supervisors are registered through SLMS for travel training. We recommend that travelers and supervisors take the training **before** they travel.

- Employees applying for travel cards will be registered for training by their supervisor or agency liaison if they have not already taken it.

- The BSC will be creating On-Demand video trainings in SLMS, making training accessible at anytime!

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BSC Travel Training

- Travel & Expense 101: Rules and Regulations for Travelers

- Travel & Expense: Supervisor 101

- Traveler SFS Overview

- BSC Travel Labs

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Best in Class: Procurement Card Practices

- All P-card holders, proxies, and supervisors should complete training on Procurement Guidelines and the P-card processes.

- P-card purchases should comply with NYS Finance Law and Procurement Guidelines.

- P-card charges should be reconciled and the Monthly Account Summary Transmittal (MAST) form should be approved within 10 days of the statement date.

- Small dollar, low risk purchases should be made on P-cards to maximize rebate potential. Per OSC Accounts Payable Advisory 47, in most situations, agencies are required to use P-cards for purchases less than $500.

- Agencies should conduct regular audits to ensure P-cards are issued appropriately.

- P-card charges must be reconciled prior to cardholder leaving the agency.

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BSC Purchasing and P-Card Training

- Expanding P-Card Use in BSC Customer Agencies

- Purchase Order Change Notices

- Reconciling and Approving P-Card Transactions in SFS

- Requisitions and Receiving

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Best in Class: New Customer Reports

Approved P-Card transactions in SFS that failed budget
- Liaisons receive a list of transactions for the entire agency.
- P-Card approvers receive a list of transactions failing budget check.

Due to State charges more than 30 days past
- Liaisons receive a list of employees within their agency that have Due to State reports balances.
- Employee and the supervisor receive a list of Due to State balances owed.

Inactive/on-leave employees in SFS with open cards in
- Liaisons receive a list of inactive or on-leave employees in SFS with open cards in Citi.

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HR Updates

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What's New at the BSC

HR Updates:

- Human Resource Management System (HRMS) Project

- New York State Payroll Online

- Retirement Webinars

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HRMS The Enterprise HR Solution

Background:
- Multiagency project under the joint governance of CS, GOER & OGS.
- Multi-year comprehensive project to re-envision HR processes in NYS.
- BSC staff are extensively engaged in the HRMS project to ensure that BSC processes coordinate with the overall solution.

Benefits:
- One platform for all HR transactions, eliminating duplicative data entry.
- New transactional workflows at various levels.
- Employee and manager self-service for HR and benefit transactions.
- Employee transparency into transaction status.
- Faster transaction turn-around times.

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New York State Payroll Online (NYSPO):

Background:

The Office of the New York State Comptroller has implemented a new service, NYS Payroll Online, which allows NYS employees to update payroll information and opt out of paper statements. It also gives NYS employees greater control in managing their tax withholdings.

With NYS Payroll Online, employees can:

- View and print pay statement
- Opt out of receiving a paper pay statement
- View and print current and prior year W-2s
- Update email address
- Change tax withholdings

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New York State Payroll Online (NYSPO):

NYSPO will expand to allow:

- Update employee's name and home address
- Update direct deposit account information
- Receive W-2 electronically

What to do next:

- Employees from participating agencies can enroll in NYSPO at https://psonline.osc.ny.gov.
- If your agency is not currently participating in NYSPO but would like to sign up, send the name and contact information of your appointed Agency Coordinator to NYSPayrollOnlineHelp@osc.state.ny.us.

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Agencies Participating in NYSPO:

Alcoholic Beverage Control
Authorities Budget Office
Department of Agriculture & Markets
Adirondack Park Agency
Board of Elections
Council of the Arts
Deferred Compensation Board
Division of Criminal Justice System
Department of Civil Service
Department of Economic Development
Division of Housing and Community Renewal
Division of Human Rights
Division of Homeland Security & Emergency Services
Department of Motor Vehicles
Department of Health

Department of State
Department of Public Service
Division of Veterans Affairs
NYS Financial Control Board for NYC
NYS Gaming Commission
Governor's Office of Employee Relations
Higher Education Services Corporation
Hudson River Valley Greenway CC
NYS Interest on Lawyer Account Fund
Information Technology Services
Justice Center
NYS Joint Commission on Public Ethics
Lake George Park Commission
Labor Management Committees
Office of Alcoholism & Substance Abuse Services
Office of Children & Family Services

Office of the Aging
Office of General Services
Office of Indigent Legal Services
Office of Mental Health - Central Office
Office of Medicaid Inspector General
Office for the Prevention of Domestic Violence
Office of State Inspector General
Office of Temporary & Disability Assistance
Office of Victim Services
Office of the Welfare Inspector General
Public Employment Relations Board
State Commission of Corrections
Statewide Financial System
Tug Hill
Workers Compensation Board

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BSC Retirement Training

- May 17th & 31st

- June 7th & 21st

- July 12th and 26th

- August 16th & 30th

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General Updates

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What's New at the BSC

General Updates:

- Record Retention Work Groups
- On-Demand Video Training in SLMS
- RightNow Customer Portal
- Automatic Ticketing of Customer Emails

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Future Record Retention Work Groups

The BSC ensures customer agency records are maintained in compliance with the record retention requirements outlined for NYS Government Records.

- Record retention processes change as we move to electronic records.
- Some agencies need records retained longer than others.
- BSC needs to understand these needs and work with agencies to ensure their record retention needs are met.
- The BSC is developing a cross-agency work group to determine special record retention needs.
- Contact BSCCustomerCare@ogs.ny.gov, if interested in joining the work group.

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On-Demand Video Training in SLMS

Background:

- The BSC in moving from live WebExes to On-Demand video training, making training accessible at anytime!

Benefits:

- Easy for employees to schedule.
- Easy for supervisors to track.
- More interactive training accessible on-demand.

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RightNow Customer Portal

Background:

- BSC uses RightNow to ticket customer inquiries and act as an internal knowledgebase.
- RightNow has the ability to allow the public access to the knowledgebase through a website link.
- We are in the process of applying the OGS BSC branding to the knowledgebase search engine and creating customer-centric content.

Benefits:

- Easy access to an expanding knowledgebase.
- Increased your ability to self-serve.
- Accessible 24 hours a day, every day!

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Automatic Ticket Creation of Customer Emails

Background:

- RightNow is used to manually create tickets for all incoming customer inquiries and reports are pulled from RightNow to understand incoming inquiry volume and resolution rates.
- RightNow has functionality that allows for the systematic creation of tickets from emails.
- We are testing this functionality in the Travel and Expense Service Line and will be rolling it out to other Service Lines in phases.

Benefits:

- Consistent ticketing.
- Reduced time spent on ticket creation.
- More accurate reporting related to resolution time.

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Questions and Answers Session

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