



Shared Services Center Implementation Update

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Agenda

- Talent Management
- College/Unit Integration
- Communication Strategy
- SSC Services
- Commitment to Customer Service
- Questions

Talent Management - Completed

- Formed a search committee, posted and filled SSC leadership and staff positions.
- Completed a talent profile for all UBSC and Payment Services staff members to identify their functional area choices.
- Completed the functional area assignments for UBSC and Payment Services staff members.
- Finalized SSC position descriptions for Acct. Rep. IV, Fin. Spec. II, and Manager Finance I.
- Implemented and trained all SSC staff members on TeamDynamix (TDX).
- Finalized search for three financial services manager positions and five financial transaction representatives.
- Distributed talent profile survey to Arts & Sciences BSC staff members, completed 1:1 discussions, and notified them of functional area placements.

Talent Management – SSC Positions Update

Month	# of Vacant/Filled Positions	Position Title	Status
Dec 2021/Jan 2022	3	Manager Finance II, band G Functional Director positions	Completed
Feb/March 2022	3	Acct. Rep. IV, band D (2) - Travel team (1) - Fin. Mgmt. team	All completed
	3	Manager Finance I, band F (2) – Travel team (1) – P2P team	
April 2022	1	Acct. Rep. IV, band D (1) – Travel team	Completed Position and staff person transferred to the SSC from SCL
May 2022	2	Acct. Rep. IV, band D (2) – P2P team	In progress - start date is June 13
	1	Manager Finance I, band F (1) – Travel team	Completed
June 2022	1	Acct Rep IV, band D	SSC staff member transitioning to SFS July 5 – position posted Position posted
	1	Fin. Spec. II, band E	

Talent Management – In Process

- Developing the SSC unit liaison position description with HR and Compensation.
- Creating a “non-leader BSC focus group” to address concerns, fears, feelings about the SSC, talent retention, and change management, etc.
- Collaborating with Organizational Development and Effectiveness (ODE) to develop programs around change management, growth, development, and stretch opportunities.

College/Unit Integration – Completed

- Integrated SC Johnson College of Business and Statler Hotel.
- Transferred Payment Services from Procurement to the SSC.
- Established all three functional areas (Procure-to-Pay [P2P], Travel & Training, and Financial Management).
- Expanded Travel functional services to non-integrated BSCs (CALS/CHE/Brooks School of Public Policy, Research, and SCL including Athletics team travel).
- Created a TDX survey to gather feedback from service requests sent to the SSC.
- Integrated College of Arts & Sciences on June 1, 2022.

College/Unit Integration – In Process

- Integrating the College of Veterinary Medicine – CY 2022.
- Continuing discussions with Sponsored Financial Services (SFS) about the SSC handling some sponsored activity/transactions.
- Working with SFS to identify additional training opportunities for SSC staff.
- Working with Financial Information Services (FIS) to further define metrics, key performance indicators (KPIs), and timely assurance standards.
- Finalizing the Service Level Agreement (SLA) template.
- Developing a customer service satisfaction survey to send six-months after integration.

Communication Strategy – General

The SSC will:

- Work with the unit to agree upon an initial timeline for integration.
- Provide information for units to initiate communications to their faculty and staff members.
- Follow up with communications to BSC staff members regarding the talent profile process and conduct one-on-one meetings.
- Conduct monthly check-in meetings with the college business officer, the unit liaison, and the delegate.
- Follow up with college/unit two weeks before and the week of the change.
- Monthly meetings (after integration) for the first six-months.
- Use the TeamDynamix survey to measure customer satisfaction.
- Conduct a customer service satisfaction survey six-months after integration.

SSC Services – Procure-to-Pay

Procure-to-Pay

- Helps with all your buying and paying needs.
- Facilitates your most complex procurement transactions.
- Reviews I Want documents and determine the appropriate payment method by issuing direct payments or creating requisitions.
- Processes procurement card transactions over the unit's cardholder limit.
- Reviews and approve all purchase order payment requests (PREQs).
- Reviews and approve all procurement card transactions (PCDOs).
- Processes procurement card application requests and follow-up as needed with the applicant.
- Provides Accounts Payable, Vendor Registration, and Credit Card Program services.

SSC Services – Travel & Training

Travel & Training

- Provides travel-related services to all faculty and staff members, students, and guests (excludes booking travel).
- Prepares Concur expense reports for faculty and staff members, if desired.
- Reviews Concur expense reports for policy compliance.
- Processes Travel & Meal card application requests and follows up as needed with the applicant.
- Reviews and follows up on outstanding T&M card transactions with travelers, delegates, or department managers.
- Reviews and follows up on unused tickets, as needed.

SSC Services – Financial Management

Financial Management (Including Sponsored Activity)

- Provides budget and reporting support to financial management customers.
- Monitors and reviews asset/liability object codes for all customers, and performs reconciliations, as needed.
- Performs reconciliations.
- Processes and approves new account requests, maintenance e-docs, and account delegations.
- Initiates and/or approves accounting transactions submitted on e-docs, including Auxiliary Voucher (AV), Budget Adjustment (BA), Distribution of Income and Expense (DI), General Ledger Transfer (GLT), Salary Transfer (ST), Transfer of Funds (TF), and Internal Billing (IB).
- Processes KFS/KDW access requests.
- Reviews and updates annual certifications (KFS system roles, PCard, Travel & Meal Card, and PCI compliance coordination) in collaboration with college/unit.

SSC Services – Other

Revenue

- Process incoming cash and checks and record transactions in the general ledger.
 - Initiate Advance Deposits (AD)

Payroll

- Serve as the payroll representative for existing customers.

For all functional areas, the SSC provides training and policy guidance and interpretation to create the most seamless experience for our customers.

Commitment to Customer Service

Turnaround Standards

- Within **5 business days** of when the SSC receives the request, for most transactions.
- To view a full list, visit: <https://www.dfa.cornell.edu/ssc/about/standards>

Standard Business Hours

- Monday through Friday, 8:00 a.m. – 4:30 p.m.
- A staff person is on-site **five days a week** for functions that can't be performed remotely.

Contacting the SSC

- Email shared-services-center@cornell.edu
 - We use **TeamDynamix (TDX)** to track and respond to your requests. This process will help us serve you by ensuring no communication is lost and that every communication receives a trackable response.
 - For urgent requests, please include that in the subject line of your email.
 - If you would like to speak with someone, please include that in your request.

SSC Updates and Information

- Visit the Project page at <https://dfa.cornell.edu/ssc/project>

Questions?

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