

# Shared Services Center Implementation Update

Questions and Answers  
February 2, 2023

## **Q1: What is timely assurance?**

A: Timely assurance is a data-driven automated process for reviewing transactions using scripted routines to produce analytics and visualized dashboards. The process is designed to notify the Shared Services Center and BSCs of potential areas for corrective action or process improvements. Some specific reviews are unallowable object codes on sponsored accounts, KFS system access on termed employees, and procurement card split transactions.

## **Q2: Which verticals would need more analytical skills and problem-solving?**

A2: Each functional area needs analytical and problem-solving skills to be successful.

In **Procure-to-Pay**, we triage I Want documents to determine payment methods, review supporting documentation, and work with requestors to gather additional information as needed. We initiate and approve direct payments and requisitions, review procurement card transactions for policy compliance and account assignment and approve payment requests for e-SHOP and purchase orders, all of which require the ability to understand and apply university policies and procedures, as well as the ability to communicate effectively with customers and colleagues.

In **Travel & Training**, we review faculty and staff Concur expense reports for compliance with university policies and state and federal guidelines. We review student travel and determine if it is student business travel, mission-related, or a student travel grant. We review and process guest/visitor travel reimbursements and process them according to policy. Travel and Meal card transactions are audited for compliance with university policy. Post-audit reports are reviewed to ensure high-risk transactions are correctly processed. Additional reports are reviewed for expense submission timeliness and outstanding employee travel liabilities.

In **Financial Management & Reporting (FMR)**, we receive transactions to initiate, review and/or approve, such as transfer of funds, general ledger corrections, distribution of income and expense, salary transfers, internal billings, budget adjustments, new account requests, etc. When we receive a request to initiate and approve, we need to determine the appropriate e-doc type. We review and reconcile asset and liability object codes and work with various central units and others to solve system and transactional situations.

## **Q3: How do you receive access requests (e.g., KDW, reporting, local security, e-SHOP)? Do you have a form, or is it just through email?**

A3: We use a TeamDynamix form to receive requests for system access, [System Access Request \(cornell.edu\)](#). You can use this form to communicate updates to an individual's access to financial systems such as KFS, KDW/OAS, and KDW local security. When you submit the form, it automatically routes to FMR to complete the request. To see other forms we use, visit our [Forms](#) page.

## **Q4: Why does it take within a month for items to be processed?**

A4: Our turnaround standard for many transactions is **within 5 business days** of when the SSC receives the request. Transactions that may take longer than 5 business days fall within the financial processing area, such as transfer of funds (TF), budget adjustment (BA), distribution of income and expense (DI), etc. See a complete list of our turnaround standards on our [Standards](#) page.

**Q5: To get the VWR rebate on transactions, will that continue with the 5-day turnaround?**

A5: Yes, we will continue to confirm receiving within the Controller's guidelines and approve payment requests to VWR within 5 business days to maintain eligibility for the early payment discount.

**Q6: What is the difference between the CALS full integration and having the staff report to the SSC?**

A6: Effective February 16, CALS/CHE/Brooks School of Public Policy (BSPP) BSC staff will report to the SSC. They will continue to do the work they are doing today to support CALS/CHE/BSPP until we move forward with a full-service integration. When the full-service integration date is mutually agreed upon, we will review business processes, workflows, delegation approval limits, etc. In addition to the reporting lines change, any open BSC position search process has been transferred to the SSC for the overall recruitment process, including interviewing, hiring, training, and deploying staff to CALS/CHE/BSPP until they are integrated fully into the SSC.

**Q7: What positions are you posting, and how many are you looking to fill in each band?**

A7: Currently, we have the following positions to fill:

- **Acct Rep IV, band D positions (3):** One position will be in Procure-to-Pay, and the other two are for CALS/CHE/BSPP.
- **Finance Specialist II, band E positions (2):** One position will be in FMR, and the other will be in Procure-to-Pay.

The SSC has been approved for 115 positions. At full integration, the *approximate* headcount planned for each area will be **78 in Procure-to-Pay, 18 in Travel & Training, and 12 in FMR.**

**We will continue to assess business needs and adjust FTE in each functional area as needed.**

Other positions included in the 115-position headcount are the executive director, receptionist/administrative assistant, and SSC liaison positions. Note: This headcount does not include staff members from Payment Services, who transitioned from Procurement Services to the SSC.

**Q8: How will customer-specific training work when everyone is integrated into the SSC?**

A8: Customers can request to receive customer-specific training. If the training is not available at the time, we can discuss the need for the additional training and work with our university partners to develop it. You can also request on-demand training for your group if it is needed. Submit requests to us at [shared-services-center@cornell.edu](mailto:shared-services-center@cornell.edu).

**Q9: When our college integrates, what does it look like for the transitioning BSC staff members?**

A9: The BSC staff members who integrate into the Procure-to-Pay will continue supporting the college. If integrated into the Travel and FMR teams, they will be responsible for supporting all customers for the services outlined above in question 2 and noted within the BSC Town Hall presentation.

**Q10: What feedback have you received from the college surveys?**

A10: Themes from the survey responses are response time, training, and communications.

With **response time**, we are reviewing what transactions we can move to post-transaction audit, which will improve response time. We are monitoring turnaround times through daily reports and adjusting workload within the team as needed.

For **training**, we are working with Organizational Development and Effectiveness (ODE) to increase training available to the SSC staff, increasing the number of division training sessions, and providing various in-house training sessions.

For **communications**, several customers have provided positive feedback regarding our virtual office hours, and we plan to add a third virtual office hour session. To improve customer service consistency, we are enhancing TeamDynamix (TDX) to use templated responses to common questions. Also, we are communicating various tools and resources available to end users, such as standard reports for pcard auto clears available in OAS and Spend Viz, TDX forms published for SSC requests for services, and upon request providing ad hoc customer training.