



Business Service Center Town Hall

Shared Services Center Update

Simon P. MacDonald Allen, VP Finance

Karen Mahalo, University Controller

Sherry Guernsey, Executive Director, Shared Services Center

February 2, 2023

Agenda

- College/Unit Integration Status
- Talent Management
- Challenges and Opportunities
- SSC Services
 - “A day in the life of an SSC staff member”
- Commitment to Customer Service
- Q&A

College/Unit Integration Status

Completed Integrations

- SC Johnson College of Business: **June 2021**
- Statler Hotel: **January 2022**
- College of Arts & Sciences: **June 2022**

Related Completed Tasks

- Established all three functional areas (Procure-to-Pay, Travel, and Fin. Mgmt.): **March 2022**
- Transferred Payment Services from Procurement to the SSC: **March 2022**
- Expanded Concur travel services to these **non-integrated** BSCs: **April/May 2022**
 - Student & Campus Life, including athletics team travel
 - CALS/CHE/Brooks School of Public Policy
 - Research
- Finalized Service Level Agreement template: **June 2022**
- Standardized fiscal officer/delegate approval limits: **September 2023**
- Sent post integration customer surveys colleges/units and pre-existing SSC customers: **September 2022; January 2023**

College/Unit Integration Status

In-Progress Integrations

- Geneva Experiment Station, Concur Travel: **February 1, 2023**
- Geneva BSC full transition: **February 13, 2023**
- CALS/CHE/Brooks School of Public Policy, reporting lines: **February 16, 2023**
- College of Veterinary Medicine: **March 1, 2023**

Integrations to Come

- Research
- CALS/CHE/Brooks School of Public Policy (full-service integration)
- Student & Campus Life
- Cornell Engineering/CIS/CU Tech

Talent Management



Talent Management Status

Completed

- Aligned SSC and Arts and Sciences BSC staff members in their preferred functional areas.
- Trained all SSC staff members how to use TeamDynamix (TDX).
- Filled multiple vacant positions.
- Held a non-leader SSC focus group, facilitated by Organizational Development & Effectiveness (ODE), to obtain feedback on the integration, concerns, fears, feelings, talent retention, etc.

In Progress

- Brainstorming with SSC team on recommendations resulting from the non-leader SSC focus group sessions. Next steps is to prioritize the recommendations.
- Continued collaborating with ODE on change management, growth and development opportunity plans and programs.

Talent Profile Survey

- Talent Profiles help the SSC determine functional area assignments for integrating staff members.
- BSC staff members are invited to complete a talent profile survey before the unit is integrated.
- The SSC executive director meets 1:1 with the staff members to gather any additional feedback.
- The BSC staff member is notified of their functional area placement and reporting lines before the integration takes place.



Challenges and Opportunities

Challenges to building the necessary framework to successfully perform existing and future services, meet turnaround standards, and the needs of the customers:

- Transaction volume has been increasing and is higher than expected.
- Colleges/units are now requesting services be performed in the SSC.
- Colleges/units are retaining some BSC positions to perform core functions.
- Current SSC staffing levels do not allow time to assess potential process improvements and efficiencies as quickly as expected.

To address the transaction volume and staffing gap:

- We continue to offer overtime to SSC staff members who are interested.
- We extended our part-time temps for a six-month term or longer.
- We will look at 6-month gigs, either full-time or part-time.
- We will offer summer internships for Cornell students.
- We will identify quick wins from the wish list of potential efficiencies, enhancements, and needs.



SSC Services – All Teams

- The goal is for staff members to process transactions on a first-in, first-out basis with broad knowledge of the customer base.
- The KFS system requires that a primary approver be identified.
 - Procure-to-Pay and Financial Management have assigned approvers within their queues.
- Provide training and policy guidance and interpretation to create the most seamless experience for customers.
- Provide ad hoc training, when requested.
- Respond to TeamDynamix (TDX) service requests.

SSC Services – Procure-to-Pay

Procure-to-Pay

Helps with all buying and paying needs.

- Facilitate complex procurement transactions.
- Review I Want documents and determine the appropriate payment method and issue direct payments or create requisitions.
- Process procurement card transactions over the unit's cardholder limit.
- Review and approve all purchase order payment requests (PREQs).
- Review and approve all procurement card transactions (PCDOs).
- Process procurement card application requests and follow-up as needed with the applicant.
- Process deposits and prepare advance deposits (ADs).
- Serve as payroll representatives for former UBSC customers.
- Provide accounts payable, vendor registration, and credit card program services.
- Provide ad hoc training and participate in procurement certification training.
- Respond to service requests received through TeamDynamix.

SSC Services – Travel & Training

Travel & Training

- Provide travel-related services to all faculty, staff, students, and guests (excludes booking of travel).
- Prepare Concur expense reports for faculty and staff, if desired.
- Review expense reports in Concur for policy compliance.
- Process Travel & Meal card application requests and follow-up as needed with the applicant.
- Review and follow-up on outstanding T&M card transactions with traveler, delegate, or department manager.
- Review and follow-up on unused tickets, as needed.
- Review and approve, as appropriate, expense reports for faculty and staff who use the T&M card for non-travel expenses.
- Review and process proper payment method for travel expenses required direct payment.
- Process travel grants to students in the Peoplesoft system, when requested.
- Provide regular scheduled travel training sessions and ad hoc training.

SSC Services – Financial Management & Other

Financial Management & Reporting

Accounts and Access:

- Process and approve, as appropriate, new account requests, maintenance e-docs, and account delegations.
- Update KFS fiscal officers and delegates, account managers, account supervisors, and KFS org managers.
- Process various system access requests (e.g., KFS/KDW).
- Perform annual certification processes (KFS system/roles, pcard, and T&M card).

Processing, Reviews, and Reconciliations:

- Initiate and/or approve, as appropriate, accounting transactions such as Auxiliary Voucher (AV), Budget Adjustment (BA), Distribution of Income and Expense (DI), General Ledger Transfer (GLT), Salary Transfer (ST), Transfer of Funds (TF), Internal Billing (IB), etc.
- Monitor and review asset/liability object codes for all customers and follow up, as needed.
- Perform reconciliations as agreed upon with college/unit.
- Perform post-transaction reviews of transactional data, allowability, other general expense categories, etc. for sponsored activity.

Audit and Other:

- Help college/units respond to audit requests and findings.
- Support Cornell United Way campaign and works closely with the Ithaca downtown United Way Office.

Commitment to Customer Service

Contacting the SSC

Email: shared-services-center@cornell.edu

- We use **TeamDynamix (TDX)** to track and respond to your requests. No communication is lost; all responses are tracked.
 - For **rush** 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.

Staff available on **Teams**, **Zoom**, and **RingCentral**.
SSC main phone: (607) 255-9359.

NEW! Virtual Office Hours, via Zoom

- Every Tuesday, 10:00 a.m. – 11:00 a.m.
- Every Thursday, 3:00 p.m. – 4:00 p.m.
- May increase frequency in the near future.

Turnaround Standards

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

Standard Business Hours

- Monday – Friday, 8:00 a.m. – 4:30 p.m.
- A staff person is onsite **five days a week** for functions that can't be performed remotely (e.g., mail, deposits).
- Emergency contact information will be provided.

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