



2015 Purchasing Forum & Trade Show

Smart Purchasing

Working with the BSC

Opportunities on the Horizon

May 20 & 21, 2015



Our Mission

The Business Services Center (BSC) provides shared services to standardize human resources and finance transactions for New York State. Our efforts increase efficiencies, lower costs, and support agencies as they focus on core mission activities. Services are delivered by a highly motivated workforce committed to providing exceptional customer service.



What is the Status of the BSC?

- We launched on September 27, 2012 and finance currently serves 61 agencies.
- Once the transition is complete, the BSC will process finance transactions on behalf of all executive office agencies.
- Agencies become 'customers' of the BSC.



Purchasing



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BSC Purchasing Services

- Provide guidance on purchasing policies and procedures.
- Conduct training on purchasing guidelines and using SFS.
- Turn requisitions into purchase orders.
- Process change notices to previously issued purchase orders (POs) for stand alone and agency specific contract POs.
- Process Invitations for Bids (IFBs) on behalf of customer agencies.



Purchasing Guidance

- Agency staff can call the BSC for advice on what is required for a procurement or how to proceed.
- Some vendor selections are defined by law and others are a program decision – this includes the use of MWBE and SDVOB vendors.
- When selecting a vendor, considerations include price, availability of goods/services and past experience.
- BSC will advise when MWBE and SDVOB vendors can be used – program should contact the MWBE and SDVOB offices directly for advice on locating available vendors for their specific requirements.



Requisitions

- The BSC Purchasing Service Line is responsible for processing purchase order (PO) transactions.
- All transactions are started with a requisition entered into SFS by the program unit and completed with the issuance of a PO by the BSC.
- Our goal is to process a PO within three business days. This is based on the premise that a “**complete**” requisition is received.



What Constitutes a Complete Requisition?

When you enter a requisition in SFS:

- Use a valid SFS vendor ID
- Be sure all the chart fields are complete and funds are available
- Utilize the BSC checklist (www.bsc.ogs.ny.gov/content/purchasing)
- Attach applicable supporting documents
 - Approved B1184
 - Attachment C
 - PTP approval number
 - Valid quote
 - Contact name and phone number
 - Invoices for confirming orders
 - Itemize/complete description



Compliance Impact

BSC ensures that every PO issued meets procurement requirements and is a complete procurement record. To ensure compliance and timely processing of all requisitions agencies should:

- Contact the BSC early in the procurement process.
- Use Preferred Sources or centralized contracts when appropriate.
- Make sure quotes are valid.
- Include documentation of reasonableness of price.
- Attach the following documentation when appropriate:
 - B1184
 - Prevailing wage rates
 - Proof of Insurance
 - Lobbying Law



Change Notices: Stand Alone Purchase Orders

- Used to amend a previously issued PO.
- Facilitate payment of an invoice or update information that was provided to the vendor.
- May include price (increases or decreases), quantity, or description changes.
- Also used to unencumber funds when the balance of the purchase order is not expected to be used.

To request a change notice on a stand alone PO send an email to: ogspurchasingunit@ogs.ny.gov.

- Provide detailed information to ensure that the PO will be revised as you intended.



Change Notices: Agency Specific Contracts

- Generally done to encumber or unencumber funds to facilitate payments made on contract purchases.
- Change notices for agency specific contracts can be complex. Often there are multiple POs, sequences and amendments for one contract.

To request a change notice to an agency specific contract PO send an email to: contractpos@ogs.ny.gov.

- Provide detailed information to ensure that the PO will be revised as intended.



Invitation for Bids (IFBs)

BSC Purchasing can support agencies with IFBs for one-time commodity purchases that are not available from a Preferred Source or a centralized contract and exceed the discretionary thresholds of \$50,000 for OSC approval or \$200,000 for MWBE purchases.

What can agencies do to facilitate timely processing of IFBs?

- Plan ahead! Estimated processing time 6 – 9 months.
- Be prepared to serve as the subject matter expert.
- Provide comprehensive specifications that do not limit competition.
- Be familiar with procurement lobbying laws and restricted periods.
- Provide contact information.
- Respond timely to all inquires



EE1



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Impact of EE1 on Purchasing

EE1 will have minimal change on the following:

- Stand alone POs
- Stand alone PO change notices
- Contract PO change notices



Changes Resulting From EE1

Agency-Specific Contracts & Purchase Orders Requiring OSC Approval:

- Elimination of 2-step contract process.
- Requisitions will be used to initiate the contract process (including contract header) in the SFS contracts module.
- The contract release function will be used to generate POs linked to agency-specific contracts.

Agency Role

- Agencies will create contracts, contract lines for release and POs

BSC Role

- The BSC will not have a role in the creation of agency-specific contracts or the POs that are created in the SFS contracts module.
- Change notices to contract POs will still be processed by the BSC.
- Standalone POs will still be processed by the BSC.



Accounts Payable



Accounts Payable Roles

BSC:

- Intake of vendor invoices.
- Validation of changes through cooperation with agencies.
- Submission of vouchers to OSC for payment to vendors.

Agency:

- Confirm receipt of commodities in SFS or provide confirmation of receipt of a service.
- Provide appropriate coding.

OSC:

- Make payments via check or electronic transfer.



Invoices

- Invoices should be submitted directly to the BSC from the vendor.
- If you receive the invoice first, forward it to the BSC for processing with the BSC Invoices Submission Form found at: www.bsc.ogs.ny.gov/content/accounts-payable.
- Make sure to include:
 - Name of the agency specified on the order & their GLBU
 - Invoice number and/or account number
 - A valid NYS PO number and/or contract number associated with the service or commodity provided
 - The vendor's SFS Vendor ID Number
 - Invoice date



Invoice Submission

The BSC accepts invoices via email or USPS. Agencies should only submit an invoice once; sending a single invoice multiple times may lead to duplicate processing and delays in payment.

Email Submission

- Submit a PDF version of your invoice and BSC Invoice Submission Form for Agencies to: accountspayable@ogs.ny.gov.
- The subject line should include
 - Invoice number
 - Name of agency being billed

USPS Submission

- Submit your invoice and BSC Invoice Submission Form for Agencies to:

Name of Agency on PO

c/o NYS OGS BSC

P.O. Box 2117

Albany, NY 12220-0117



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Agency FileNet Use

- Each agency has a designated agency liaison trained in and accountable for the agency's work in FileNet.
- Agencies are expected to complete their review of invoices forwarded to their agency review work queue within 5 days.
- Once an agency has provided all necessary coding and permissions, the BSC completes processing.
- A comprehensive FileNet user guide can be found in the agency administrator resources section of the BSC website at www.bsc.ogs.ny.gov/content/accounts-payable.



Credit Cards



Procurement Card (P-Card)

- Agencies should use the P-Card whenever possible, especially for small dollar purchases.
- Agencies earn rebates based on how much they spend on the P-Card.
- Under the new Citibank contract, rebates will be returned to agencies quarterly, enabling them to better benefit from this savings.
- The cost per transaction to issue a PO, process an invoice, and cut a check far exceed the cost associated with a P-Card transaction.
- The rebate earned is based not just on how much you spend on the P-Card, but also on how quickly you pay the bill. The quicker you pay, the higher the rebate.

Opportunities for P-Card Purchases:

1. Office supplies
2. Cleaning products
3. Frequently used miscellaneous items



BSC Contact Information

We are available 8:30 am – 5:30 pm Monday through Friday.

- **Phone:** 518-457-4272
- **Website:** www.bsc.ogs.ny.gov

Emails:

- Vendor invoices received by program should be sent to: Accountspayable@ogs.ny.gov
- Invoice payment status inquiries: APInquiries@ogs.ny.gov
- Credit Card questions can be sent to: Creditcard@ogs.ny.gov



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Questions?



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