



# 2014

## **Purchasing Forum & Trade Show** *Planting Seeds Today for Tomorrow's Success*

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Andrew M. Cuomo  
Governor  
State of New York

RoAnn M. Destito  
Commissioner  
Office of General Services



**2014**  
**Purchasing Forum  
& Trade Show**  
*May 14 & 15*

# *Doing Business With New York State*

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# Today's Presenters

## Office of General Services

- **Harry T.R. Brown, III**  
**Contract Management Specialist,**  
**New York State Procurement (NYSPRO)**
  
- **Mary Zaremba**  
**Assist. Deputy Director of BSC Finance,**  
**Business Services Center (BSC)**

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# *What To Expect Today*

## ➤ Overview of the State Purchasing Priorities

- Preferred Sources
- Centralized contracts
- Agency Contracting– including
  - *NYS Contract Reporter*
  - *Discretionary spending*

## ➤ Recommendations for Successful Bidding

- Marketing information
- Contract Award Process

## ➤ Procurement Resources

- Technical Assistance
- Other Internet Resources

## ➤ Business Services Center and the Vendor Community

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# Agency Purchasing Requirements

## Order of Purchasing Priority

- **First** – Agency uses **Preferred Sources\***
- **Second** – Agency uses **Centralized (State) Contracts for commodities, services and technology\***
- **Third** – Agency-Established Contracts
- **Fourth** – Agency conducts its own procurement, including Discretionary Spending

*\* Must meet Agency's form, function and utility*

**Review the Procurement Council Guidelines**

<http://www.ogs.ny.gov/procurecounc/pdfdoc/guidelines.pdf>

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*First*

## Agency Uses Preferred Sources

The Preferred Sources were statutorily created to advance certain social and economic goals. Learn more about the Preferred Source Program requirements

<http://www.ogs.ny.gov/BU/PC/Preferred.asp>

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# Preferred Sources

## Preferred Source status is granted to:

- Dept. of Corrections & Community Supervision –  
Corcraft: [www.CORCRAFT.org](http://www.CORCRAFT.org)
- NYS Preferred Source Program for People who are Blind  
[www.NYSPSP.org](http://www.NYSPSP.org)
- NYS Industries for the Disabled: [www.NYSID.org](http://www.NYSID.org)
- Office of Mental Health: [www.omh.ny.gov/omhweb/buyomh/](http://www.omh.ny.gov/omhweb/buyomh/)

*Individual companies cannot become a Preferred Source.  
Your company may be able to become a supplier to the Preferred Sources.  
Contact the Preferred Sources directly for information.*

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# Second

## Agency Uses Office of General Services (OGS) Centralized Contracts\*

*\*Statewide contracts that are generally competitively bid or negotiated*

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# *Types of OGS Centralized Contracts Mandatory Usage*

## ➤ **Commodities**

<http://www.ogs.ny.gov/purchase/spg/lists/commodty.asp>

## ➤ **Services**

<http://www.ogs.ny.gov/purchase/snt/lists/services.asp>

## ➤ **Technology**

<http://www.ogs.ny.gov/purchase/snt/lists/infotech.asp>

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# OGS Centralized Contracts

- Nearly 1,100 currently exists
- May contain one item or thousands of items
- Search OGS NYSPro contracts  
<http://www.ogs.ny.gov/Purchase/Search/default.asp>
- View current OGS bid opportunities on the *bid calendar*  
<http://www.ogs.ny.gov/purchase/Bidcalendarlv.asp>

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# OGS Contract Terms

- Term contracts may be awarded for up to five or more years
- Contracts are for estimated quantities
- Sales result when an agency purchases from the contract
- Sales are not guaranteed; marketing is necessary to generate sales

# *Bid Opportunities*

- Identify centralized contract(s) that include goods and/or services offered by your business.
- Learn all you can about the centralized contract area(s) and specific bid requirements.

## *Centralized Contracts*

- Bidders awarded contracts through the centralized contract bid process must be prepared to market your goods or services to contract users. Have marketing materials ready!
- A successful bid and resultant contractor number is not a guarantee of a sale. It is a competitive advantage and an opportunity for potential sales.

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# *Register for OGS Bid Opportunities*

- Starting July 1, 2014, OGS will provide all notifications on bidding opportunities through the New York State Contract Reporter site at: <https://www.nyscr.ny.gov>
- Businesses interested in learning about OGS centralized state contract bid opportunities should register for [NYS Contract Reporter E-Alerts](#).
- To receive E-Alerts, navigate to the "I want to find contracts to bid on" page to register for your free account and indicate the categories you are interested in.
- NOTE: Previous to April 2014, OGS maintained its own Bidder Notification Service on the OGS website: they are now officially transitioning to the NYS Contract Reporter only.

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# New York State Contract Reporter (NYSCR)

[www.nyscr.ny.gov](http://www.nyscr.ny.gov)

- The NYSCR is New York's official publication of procurement activity for New York State agencies, public authorities and public benefit corporations (other than notifications from the Office of General Services).
- State agencies must advertise procurements of **\$50,000** or more (*including discretionary purchases*) when they solicit bids from the business community for goods, services and construction projects in the NYSCR.



**Empire State** Development

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Opportunities posted  
in the past 24 hours

43

Opportunities posted  
in the past week

267

Total available  
opportunities

1148



# The New York State Contract Reporter

*NYS' official source of contracting opportunities –  
bringing business and government together*

Log In

Sign up and register  
for your free account!

Click here to get started

I want to  
find contracts  
to bid on



I want to  
advertise  
opportunities



Learn about the  
New York State  
Business Registry



Learn about  
doing business  
with New York



#### Quick Links

- Footer link



# *Resellers • Dealers Distributors • Agents*

**Contracts may allow vendor participation.....**

## **BENEFITS**

- Maximize manufacturer's ability to market and support a statewide contract
- Provide opportunities for sale from contractor's designated local resellers, dealers, distributors or agents
- Promote New York small, minority, women-owned business participation

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# *How To Participate as a Reseller, Dealer, Distributor, or Agent on OGS Centralized Contracts?*

➤ Check contract to determine availability of participation

➤ Examples

**Computer Storage**

**Audio/Visual**

**Printers**

**Copiers**

**Microcomputers**

➤ Contact contractor directly for participation opportunities

➤ All sales must agree with contract terms and conditions!

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## Third

Agency determines if an established agency contract can be used

## Fourth

Agency conducts its own procurement

# *Agency Discretionary Purchasing Authority*

- Discretionary purchases are procurements made below statutorily established dollar amounts and at the discretion of the agency, without the need for a formal competitive procurement process.
- Use of discretionary purchasing streamlines the procurement process.

## *Discretionary Purchasing Guidelines*

<http://www.ogs.ny.gov/procurecounc/pdfdoc/DiscretionaryPurchasingGuidelines.pdf>

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# Discretionary Purchasing Authority Thresholds

- **\$50,000** for most State agencies

## *Discretionary levels increase to:*

- **\$200,000** for purchases from a **New York Small Business** or **New York State Certified Minority or Woman-Owned Business Enterprise (M/WBE)**
- **\$200,000** for commodities or technology that are recycled or remanufactured and,
- ✓ **New \$200,000** for commodities that are food, including milk or milk products, grown, produced, or harvested in New York State

*Discretionary Thresholds Reference Chart on OGS website:*

<http://www.ogs.ny.gov/purchase/spg/pdfdocs/PnpDiscretionaryThresholds.pdf>

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# New York State Small Business & M/WBE

**A New York State Small Business is defined as:**

- Resident to New York State
- Independently owned and operated
- 100 or fewer employees
- Not dominant in its field

***There is no certification process for “New York State Small Business”***

**A Minority/Woman-Owned Business Enterprise (M/WBE):**

*Must be certified by NYS Empire State Development*

*For information on the **certification** process, contact  
**Empire State Development** at their website:*

**<http://esd.ny.gov/MWBE/Certification.html>**

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# *Recommendations for Successful Bidding*

- ✓ **Marketing information**
  - ✓ **Helpful hints**
- ✓ **Contract Award Process**

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# State Finance Law Bidder Requirements

- Bidder must be **responsive** to bid requirements
- Bidder must be a **responsible** bidder meeting FLIP requirements
  - Financial & Organizational Capacity
    - Legal Authority
    - Integrity
    - Past Performance
- Comptroller's Vendor Responsibility information  
<http://www.osc.state.ny.us/vendrep/index.htm>

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# ***NYS Vendor Identification Number Office of the State Comptroller***

## **➤ Needed to:**

- Enroll in NYS VendRep System
- Receive payments

## **➤ How to obtain a Vendor ID:**

- Contact your contracting State agency
- Contact OSC Help Desk, if you do not have a contracting State agency

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# *NYS VendRep System*

## *Office of the State Comptroller*

- Allows business entities (vendors) to enter and maintain their Vendor Responsibility Questionnaire information in a secure, centralized database
- Makes information available to New York State agencies
- Requires assignment of a NYS Vendor ID number

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# Know the Vocabulary of Procurement

- **IFB – Invitation For Bid** – used in procurement of commodities, awarded to the responsive and responsible bidder on the basis of **lowest price**.
- **RFP – Request for Proposals** – used for procurements when factors in addition to cost are weighed and awarded to the responsive and responsible proposer offering the **best value**.

For a **glossary** of commonly used procurement terms, refer to the procurement guidelines

<http://www.ogs.ny.gov/procurecounc/pdfdoc/guidelines.pdf>

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# *Before Submitting a Bid*

- Register with soliciting agency to receive bids and amendments
- Request a NYS Vendor ID, if submitting to State agency
- Maintain up-to-date business profile to receive proper notifications, where applicable
- Read entire proposal and follow instructions
- Enroll in NYS VendRep System, if required
- Submit questions for clarification during the inquiry period
- Verify bid submittal for accuracy and completeness

# *Critical Points for a Bid Submission*

- Submit a timely bid (one minute late may be a late bid resulting in bid rejection)
- Submit a signed and completed bid package
- Price bid competitively
- Submit required mandatory forms
- Be responsive to all bid requirements
- Demonstrate vendor responsibility
- Provide proper licenses, insurance, and current references where required

# ***Bid Improvement Opportunities***

- If unsuccessful in receiving an award, request an agency debriefing to learn how to improve future bids
- A debriefing will detail shortcomings of your bid submission
  - ✓ Take notes
  - ✓ Ask questions
  - ✓ Request assistance from Procurement Technical Assistance Centers  
<http://www.dla.mil/SmallBusiness/Pages/ptac.aspx>
  - ✓ Request assistance from Small Business Development Centers in your area  
<http://www.nyssbdc.org>

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# Identify Your Buyer

## Not All Government Entities Are Alike

### ➤ State Agencies

Operate under State Finance Law

### ➤ Municipalities (counties, cities, towns, etc.)

Operate under General Municipal Law

### ➤ Other Entities

#### - Authorities

Operate under Public Authorities Law

#### - School Districts

Operate under General Municipal Law & State Education Law

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# *Open Book New York*

## *Office of the State Comptroller*

### ➤ **State Contracts**

- Search active State agency contracts and certain State authority contracts to see who is doing business with the State
- Information is updated daily

### ➤ **Local Government Spending**

- See how your county, city, town village, fire or school district gets and spends your money
- Data is updated annually

<http://www.openbooknewyork.com/>

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# Marketing Resources

**The Office of the State Comptroller publishes the “Directory of Frequently Purchased Commodities and Services by New York State Agencies”**

- Lists contact information for procurement personnel in New York State agencies
- Lists agencies’ most frequently purchased commodities and services
- Updated annually
- Available online at: <http://osc.state.ny.us/reports/fiscal/directorycommodities.pdf>

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# *Contract Award Process*

- Contracts generally require the Office of the State Comptroller's (OSC) approval
- Agency award process may take several months for award recommendation which includes final approval by OSC
- NYS VendRep provides current information on contracts being reviewed by OSC

# Contract Award Information

- Office of the State Comptroller's Open Book New York - lists all active State agency contracts and certain State authority contracts  
<http://www.openbooknewyork.com/>
- Design & Construction – lists all OGS Design & Construction awards
- New York State Contract Reporter – lists all agency bid results
- OGS - lists awarded centralized contracts and bid results

***Once awarded, contracts are monitored to ensure contractor compliance with terms and conditions.***

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# Procurement Resources

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# *Empire State Development (ESD)*

- **ESD** provides procurement guidance, information, and referral to resources to help businesses understand the procurement process and access government procurement opportunities. ESD understands that  
**SALES ARE JOBS!**
- **ESD** is responsible for publishing the *New York State Contract Reporter* - [www.nyscr.org](http://www.nyscr.org)
- **ESD** has statutory responsibilities under the Omnibus Procurement Act to promote New York business participation in state contracting opportunities as prime contractors, subcontractors and suppliers

[www.esd.ny.gov](http://www.esd.ny.gov)

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# Free Technical Assistance

- **Procurement Technical Assistance Centers (PTAC)** – funded by the United States Department of Defense - seven PTAC locations in New York  
<http://www.dla.mil/SmallBusiness/Pages/ptac.aspx>
- **Small Business Development Centers (SBDC)** – administered by State University of New York and funded by the Small Business Administration, New York State, and host campuses for SBDC locations  
<http://www.nyssbdc.org>
- **Entrepreneurial Assistance Centers** - funded in part by ESD, these centers help individuals with their new and startup businesses. For information and locations:  
<http://www.esd.ny.gov/BusinessPrograms/Data/EAP/EAPCenters.pdf>
- Look for procurement “how to” workshops, conferences, and other events on the NYSCR

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# *Doing Business with Other States & Countries*

- **National Association of State Purchasing Officials -**  
Find information about Cooperative Purchasing Agreements (used by multiple states) and links to purchasing information for all 50 States  
<http://www.naspo.org/>
- **MERX – Doing business with Canada -** Site for doing business with Canadian public sector – new tenders advertised daily  
<http://www.merx.com>
- **International Division – Empire State Development -**  
International trade consulting & assistance  
<http://www.esd.ny.gov/International/Export.html>

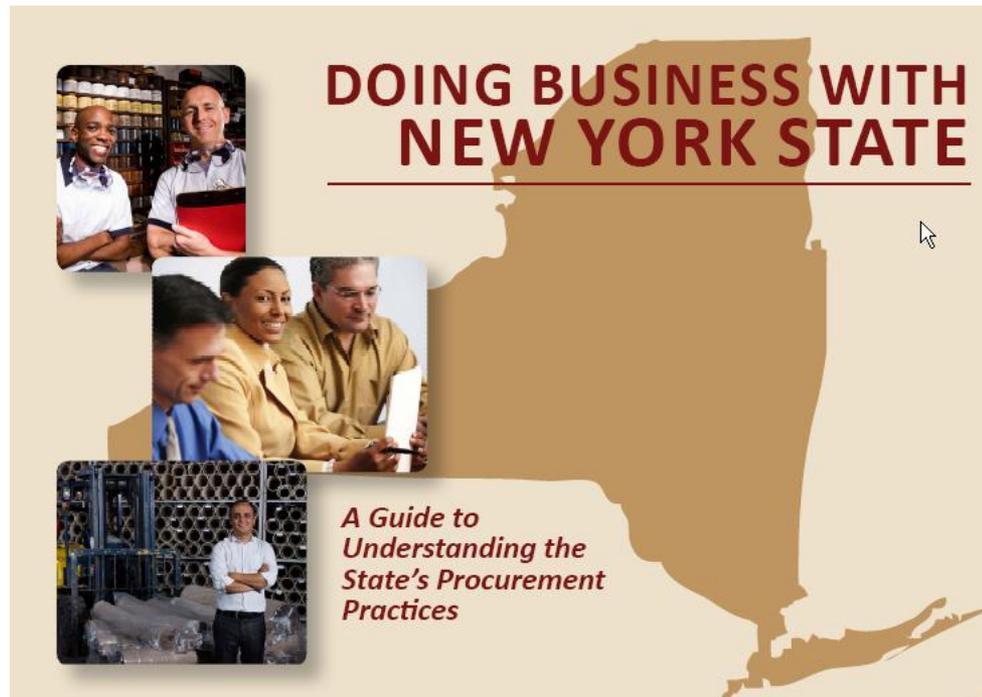
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# Internet Resources

All the information contained in this presentation can be found in a guide developed by NYS Office of General Services and Empire State Development:



<http://www.ogs.ny.gov/BU/PC/Docs/DoingBusinessWithNY.pdf>

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# ***Business Services Center and the Vendor Community***

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Office of General Services

- **What is the Business Services Center?**

- How is the transition to the BSC being managed?

- What should Vendors know about the BSC?

# Introducing the OGS Business Services Center

## Why was the BSC created?

- In the 2012-2013 Executive Budget, Governor Cuomo called for the establishment of a Business Services Center as a key part of his plan to re-imagine government.
- The BSC's purpose is to streamline transactional Human Resources (HR) and Finance services that are largely common across agencies, increasing the efficiency and effectiveness of government's operations.

## What is the status of the BSC?

- The Business Services Center was launched on September 27, 2012 and will continue to expand to become New York's central office for processing HR and Finance transactions.
- The BSC currently serves 57 agencies and is in the process of adding 4 more before the end of 2014.
- Once the transition is complete, the BSC will process HR and Finance transactions on behalf of all NYS Executive Department Agencies. Agencies become 'customers' of the BSC.

# What are the BSC's aspirations? What do we hope to achieve?

## What the BSC will achieve

## ...How we will achieve it

- 1 Allow our State to process HR and Finance transactions simply and more efficiently

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- 2 Meet our customers' needs and expectations

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- 3 Make our work as HR and Finance professionals easier

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- 4 Create an atmosphere where employees feel empowered to bring new ideas to the table – and act on them

- Creating **standard processes** that allow each employee to **serve multiple agencies** consistently

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- **Understanding our customers' expectations** and codifying them in Service Level Agreements (SLAs)
- **Tracking how well we're meeting customer needs** as an organization (e.g., via a ticketing system) and responding accordingly

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- Designing **meaningful training programs** on functional and service-line-specific skills
- Investing in **technology** to speed processing

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- **Creating a norm** where raising questions/ideas is encouraged and expected
- Establishing forums in which goals and targets are discussed openly and **staff bring creative ideas to the table** on how to reach them

# We currently provide a number of Finance and HR services, with the potential for additional services in the coming years

Current focus on Finance

	Current functions	Future-state functions, to be added within 2-3 years	Out-of-scope functions
Finance	<ul style="list-style-type: none"> <li>▪ Accounts receivable</li> <li>▪ Accounts payable</li> <li>▪ Travel and expense</li> <li>▪ Purchase orders</li> <li>▪ Credit card administration</li> </ul>	<ul style="list-style-type: none"> <li>▪ General accounting</li> <li>▪ Centralized asset management</li> </ul>	<ul style="list-style-type: none"> <li>▪ Strategic finance functions for which agency expertise is critical, e.g.:                             <ul style="list-style-type: none"> <li>— Agency budgeting</li> <li>— Contracting</li> <li>— General ledger</li> </ul> </li> </ul>
Human Resources	<ul style="list-style-type: none"> <li>▪ Payroll administration</li> <li>▪ Time and attendance</li> <li>▪ Benefits administration</li> <li>▪ Personnel administration</li> <li>▪ General employee inquiries</li> </ul>	<ul style="list-style-type: none"> <li>▪ Performance evaluation support</li> <li>▪ Recruiting support</li> </ul>	<ul style="list-style-type: none"> <li>▪ Strategic HR functions for which agency expertise is critical, e.g.:                             <ul style="list-style-type: none"> <li>— Workforce planning</li> <li>— Labor relations</li> <li>— Leadership development</li> </ul> </li> </ul>



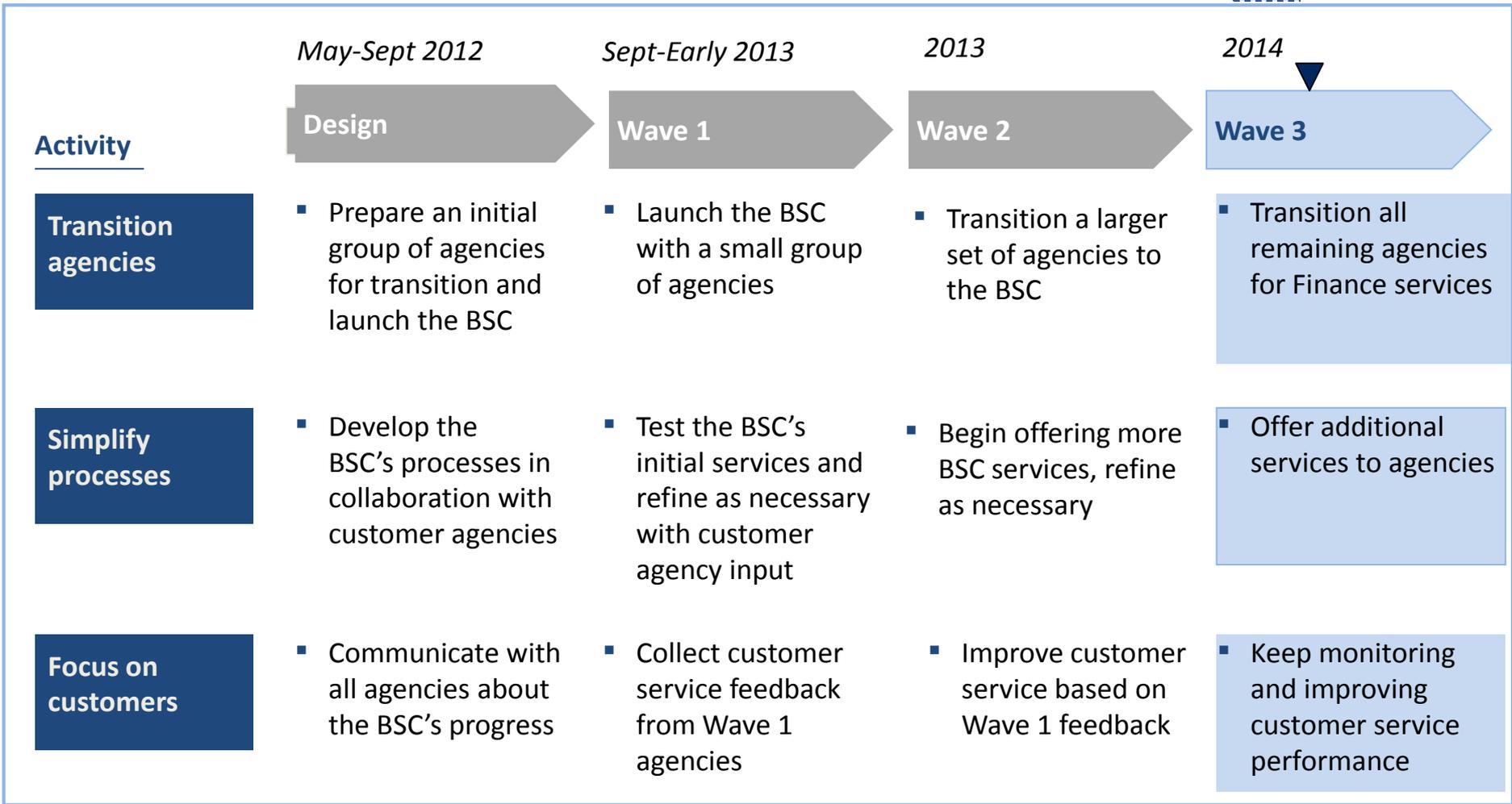
- What is the Business Services Center?

- **How is the transition to the BSC being managed?**

- What should Vendors know about the BSC?

# The BSC will initially progress in three waves and is doing so in a collaborative, feedback-driven way

▼ Where we are now  
 Focus of today



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# Agencies currently receiving Purchasing and Accounts Payable Services from the BSC

Adirondack Park Agency	Governor's Office of Employee Relations
Agriculture and Markets	Higher Education Service Corp
Alcoholic Beverage Control	Hudson River Valley /Greenway Communities
Board of Elections	Indigent Legal Services
Council on the Arts	Information Technology Services
Commission on Judicial Nominations	Interest on Lawyers Account
Commission on Judicial Screening	Joint Commission on Public Ethics
Deferred Compensation Board	Justice Center
Department of Civil Service	Labor-Management Committee
Department of Economic Development	Lake George Park Commission
Department of Health	Law Revision Commission
Department of Public Service	Office for Alcohol and Substance Abuse Services
Department of State	Office for the Aging
Division of the Budget	Office of General Services
Division of Homeland Security and Emergency Services	Office of Inspector General
Division of Homes & Community Renewal	Office of the Lieutenant Governor
Division of Human Rights	Office of Medicare Inspector General
Division of Military & Naval Affairs	Office of Victim Services
Division of Tax Appeals	Public Employees Relations Board
Division of Veterans' Affairs	Racing Reform
Executive Chamber	Statewide Financial System
Financial Control Board	Tax and Finance
Franchise Oversight Board	Tug Hill Commission
Gaming Commission	Welfare Inspector General
Greenway Heritage Conservancy for Hudson River Valley	Workers Compensation Board

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- What is the Business Services Center?
- How is the transition to the BSC being managed?
- **What should vendors know about the BSC?**

## General Information

- The BSC is re-inventing how NYS does business.
  - *Processes are standardized and designed to be streamlined to achieve efficiencies*
- Not all transactions are handled at the BSC for our customer agencies.
  - *Some agencies currently receive services for some, but not all, Finance lines in the BSC.*
  - *Agencies not receiving Accounts Payable services from the BSC yet should not have invoices sent to the BSC.*
- The BSC is committed to delivering superior Customer Service
- While the BSC is located in OGS, OGS is a customer of the BSC.
  - *OGS has separate Finance and Human Resource offices, just like any other agency.*
- The BSC pays invoices in accordance with the Prompt Payment Law.

## Purchase orders issued by the BSC

### Purchase Orders

- Not all Purchase Orders issued for BSC customer agencies come from the BSC. For example, Purchase Orders for grants continue to be issued by individual agencies
- Purchase Orders issued by the BSC include the BSC “Bill to” address – PO Box 2117, Corning Tower, Empire State Plaza, Albany, NY 12220-0117
- All Purchase Orders include the agency’s General Ledger Business Unit (GLBU) as the first 5 characters of the PO number, i.e. OGS01. This is key information when corresponding with the BSC on a Purchase Order
- We prefer to email Purchase Orders to our vendor customers so please include your email address on any quotes solicited by BSC customer agencies
- If you have questions on a Purchase Order issued by the BSC, you can contact the BSC at 518-457-4272 or by email at [ogspurchasingunit@ogs.ny.gov](mailto:ogspurchasingunit@ogs.ny.gov)
- Agencies are ultimately responsible for their own purchasing decisions. The BSC is responsible for transaction processing

# Submitting Invoices to the BSC

## Invoices

- Invoices for BSC issued Purchase Orders should be sent directly to the BSC
- Invoices should be submitted via email to [accountspayable@ogs.ny.gov](mailto:accountspayable@ogs.ny.gov) including the invoice number and agency GLBU in the subject field
- If mailing an invoice to the BSC send to the “Bill to” address on the PO, not the “Ship to” address.
- The BSC will be moving to a new location next year so the “Bill to” address will change.
- All invoices, regardless of how submitted, need to include the following:
  - Vendor name and SFS Vendor number
  - Invoice number
  - Name of agency receiving goods or service or their GLBU
  - Unit id or agency contact (taken from line one of the purchase order)
  - Purchase Order number
  - Line item details that match the corresponding PO line item.

# *NYS Vendors and the Statewide Financial System*

## **SFS Self Service Portal**

The State of New York has migrated to the Statewide Financial System (SFS). The SFS includes a vendor self service portal that allows vendors to readily maintain addresses, contact information, and inquire about the status of a purchase order, invoice or payment. This online application is the preferred method to perform maintenance to a vendor's New York State vendor account information on the Vendor File. If you have not already signed up for this convenient and helpful tool, information on doing so is available on the State Comptroller's website at:

<http://www.osc.state.ny.us/vendors/vendorguide/guide.htm#address>

## **Sign Up for ePayments**

ePayments is the Office of the State Comptroller's electronic payment program. It transfers payments directly into your bank account. **Vendors aren't required to enroll in ePayments, but those who do get paid faster.** The program saves time, tax dollars and is secure. To learn more about ePayments, visit the State Comptroller's website at: <http://www.osc.state.ny.us/vendors/ePayments.htm>

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## Growing the Relationship Between the BSC and the Vendor Community

- The BSC considers our customers to be our most important partners as we expand the work of the BSC
- The BSC is working to optimize our level of customer service. Tracking ticket numbers are assigned for all inquiries to the BSC. Once a ticket is resolved, a survey is sent to collect your feedback.
- The BSC website includes a section for Vendor information. Please let us know what information would be the most valuable for us to include.
- Any comments, suggestions or improvement opportunities are welcome to help us maximize the potential of the BSC organization

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## Contacting the BSC

- The BSC can be reached by phone Monday- Friday between 8:30am and 5:00pm by calling (518) 457-4272
- Invoices should be submitted via email to [accountspayable@ogs.ny.gov](mailto:accountspayable@ogs.ny.gov)
- Invoice status inquiries or questions should be sent via email to: [apinquiries@ogs.ny.gov](mailto:apinquiries@ogs.ny.gov).
- Purchase order inquiries or questions should be sent via email to: [ogspurchasingunit@ogs.ny.gov](mailto:ogspurchasingunit@ogs.ny.gov)
- General inquiries can be sent to: [BSC@ogs.ny.gov](mailto:BSC@ogs.ny.gov)
- The BSC webpage can be found at: [bsc.ogs.ny.gov](http://bsc.ogs.ny.gov)

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*Questions?*