



## Statewide Financial System Program Billing, Grants, Projects, and Revenue Community Council Agenda/Minutes

<b>Date:</b>	06/22/2016	<b>Time:</b>	1:00pm - 3:00pm
<b>Subject:</b>	Billing, Grants, Projects, and Revenue Community Council Kickoff	<b>Location:</b>	SFS Building 5 – Room G08.
<b>Agenda and Minutes Prepared by:</b>	SFS Stakeholder Services Team		
<b>Presentations/attachments</b>	See Billing, Grants, Projects, and Revenue Community Council page on SFS Secure at: <a href="https://www.sfs.ny.gov/index.php/community-council-list/billing-grants-projects-and-revenue">https://www.sfs.ny.gov/index.php/community-council-list/billing-grants-projects-and-revenue</a>		

### Agenda:

Topics	Time
<b>Council Welcome &amp; Introductions</b> <ul style="list-style-type: none"> <li>Council member introductions</li> </ul>	1:00 p.m. – 1:15 p.m.
<b>Council Overview</b> <ul style="list-style-type: none"> <li>Council Charter review</li> </ul>	1:15 p.m. – 1:45 p.m.
<b>Using the SFS - Procurement</b> <ul style="list-style-type: none"> <li>2016 Summer Update</li> </ul>	1:45 p.m. – 2:00 p.m.
<b>Adapting Agency Business Processes</b> <ul style="list-style-type: none"> <li>Review of Council member survey responses</li> <li>Discussion - Agency experience adapting business processes</li> </ul>	2:00 p.m. – 2:20 p.m.
<b>Using SFS Training</b> <ul style="list-style-type: none"> <li>Review of Council member survey responses</li> <li>Discussion - Agency experience using self-paced training</li> </ul>	2:20 p.m. – 2:40 p.m.
<b>Meeting Wrap Up</b> <ul style="list-style-type: none"> <li>Questions and Answers</li> <li>Suggestions for future agenda topics</li> </ul>	2:40 p.m. – 2:50 p.m.

### Attendees:

Catherine Adams (SED)	X	Kimberly Gurga (OGS-BSC)	X	Pam Korotsky (SFS)	X
Mike Affinito (OSC)	X	Melinda Hansen (DOL)	X	Wendy Litchfield (ITS)	X
Mary Arthur (GTS)	X	Laure Harrington (DOH)	X	Marilee Marn (COR)	
Bryan Bagstad (DHS)		Susan Hedderman (SFS)	X	Karen Martin (TDA)	
Tammy Bopp (GTS)	X	Deb Hilson (OSC)		Alison Maura (DOB)	
Jared Cherubin (SFS)	X	Sharon Hover (SCF)		Karen McKenna (OGS-BSC)	X
Greg Cobart (DOL)		Kerry Hughes (SCF)		Michael Millson (OMH)	
Tammy Coburn ( )	X	Scott Jaracz (DOT)	X	Jamie Moore (DED)	X
Deborah Coppolo (OMH)	X	Mike Jenks (OGS)	X	Courtney Noisette (SFS)	X
Alex DeFrancesco (SFS)	X	Rebecca Jones (ITS)	X	Kathy O'Brien (PRK)	X
Matthew DeGennaro (DHS)	X	Amy Kahn (SNY)	X	Meghann O'Connell (DMV)	X
Shawna Denison (DOT)		Jim Kaufman (DOB)		Christine Pereira (DOL)	
Susan Edwards (DOL)	X	William Keane (SED)	X	Dawn Rathbun (COR)	X
Kathy Fitzpatrick (DED)	X	Aaron Kinberg (DMV)		Amanda Ross-Carroll (UCS)	



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Lynn Rossi (DOL)		Melissa Sherling (DCJ)		Andrew Welcome (DOL)	
Andrew Samuelson (SFS)	X	Peggy Sherman (SFS)		Mark Williams (DCJ)	
Malissa Sankar (SNY)		Frank Slade (ITS)		Luna Zhang (OGS)	
Alphonse Saverino (DMV)		Destiny Smith (DOH)	X		
Michael Sawicz (DOH)		Jen Spierre (PRK)	X		
Robert Schwank (DEC)	X	Ashley Turchiarelli (ITS)	X		
Kathy Schwarz (TDA)		Bradley Valachovic (UCS)			
Erich Seeman (ITS)	X	Shawn Vitas (DEC)			

### The Following Decision(s) Were Made

**Decision:** N/A

### Action Items:

Task Assigned	Due Date
N/A	

### Notes:

#### Welcome/Introductions:

- Pam Korotsky and Andrew Samuelson are the SFS Stakeholder Services contacts for the Billing, Grants, Projects and Revenue Community Council. They will coordinate meetings, plan agendas, facilitate meeting discussion, prepare and post meeting notes, and elicit meeting topics.

#### Council Overview

- Meetings are not meant to be a platform to discuss status of defects and incidents.
- Future meetings should include agency involvement/presentation and SFS encourages the sharing of best practices.
- The councils are not a forum for discussion of Business Cases. If you have suggestions regarding Business Cases, please follow the process outlined on the SFS*Secure* site at: <https://www.sfs.ny.gov/index.php/system-lifecycle/business-case-form> .
- Applicable approved Business Cases have the potential of being discussed at meetings going forward.

#### Using the SFS – Billing, Grants, Projects and Revenue

- 2016 Summer Update is tentatively scheduled to be available in production on August 29<sup>th</sup>; and the 2016 BETA environment will be made available in July.
- SFS is in the process of establishing a Summer Update SFS*Secure* web page where communications and pertinent information will be posted

#### Adapting Agency Business Processes

- DMV struggled with appropriations on project child budgets/grants. They worked through it with the help of DEC, who assisted them with moving items to the right project in the new year.



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- DOL struggled with interagency billing and worked with SFS to resolve the issue. They had a few one on one meetings with the SFS Team. Meetings had structured agendas, and they were able to work through the challenges.

### Using SFS Training

Training recommendations/comments:

- Job Aids do not show you all the steps you need to see at once. For instance to set up grants there are eight job aids, sometimes they do not have all the steps. Could not tell if they are using the job aid correctly.
  - **Response:** Job Aids are not the primary source of information for learning how to use the SFS. Users should first complete the SPT topic in SLMS. Then the Job Aid can serve as a quick reference. Agencies should open a help desk ticket to inform SFS of any issues with the content in Job Aids or Self-Paced Training (SPT).
- OSC created their job aids.
- DOL is the tester of the Billing, Grants, Projects and Revenue training materials for other agencies. They are encouraged to let SFS know how training materials can be improved upon.
- Job Aids do not always link to the Guide to Financial Operations (GFO).
- Agencies often encounter direction to go to the GFO, and they get a message that the page is still under construction.
- It is nice have a piece of paper in front of them with screen shots showing how to do a task.
  - **Response:** There is a risk to using a printed version of the job aid to perform a task as it could have been updated and you may not be using the most current version.

How are you training your staff?

- Direct journals, revenues, deposits have not changed with EE1. Some agencies choose to deliver face to face training and walk through steps of a deposit until staff gets comfortable with it.
- DOH is working with SFS to resolve an issue where they cannot get SPT to load, and the SPT runs through the topic too fast.
  - **Response:** See *It* option may run through the training quickly. *Try It* may be the best option to use when you want to review the information at your own pace. Also, Internet Explorer seems to work the best with SLMS to launch training. There have been issues running the training via Google Chrome and Firefox. Regularly clearing your cache will often resolve any issue accessing the SPT.

### Meeting Wrap Up

- Like having the option to attend Council meeting on site or dial in.
- Does SFS plan to develop specific topical discussions?
  - **Response:** We do plan to include topics specific to this module in future meetings. Community Council members should be identifying key topics that require discussion, submit to Pam or Andrew via a Help Desk incident.



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- Is there a Defects report on SFSSecure?
  - **Response:** There is a Defects Report located on *SFSSecure* and it is refreshed on a daily basis. The report can be accessed from the Support drop down menu, select Support Data. SFS is providing a new and improved Defects report in the near future.
- OMH has designated a primary and an alternate for this Council. However, depending on the meeting topics additional people would need to be here.
  - **Response:** Agendas will be available one week prior to the Council meetings. Agencies should review the agenda topics to determine who should attend future meetings. Please do not forward the meeting invitation to others. Open a help desk ticket to request that additional attendees are added to the meeting invitation.