

Business Partners Round Table

Thursday, August 18, 2022 University Union Ballroom

Redefine the Possible[™]

We're Back!



SACRAMENTO STATE

Comment 'Cards'

We have Comments from April!



Comment 1

Could speakers please use the last names of whomever they're referring to? A presenter telling me that someone is working with Jennifer isn't helpful since I have no idea who Jennifer is, and sometimes I've forgotten the last names of people like "LaVerne." Plus, it keeps the BPRT meetings feeling like they're only for folks who already know all the topics and key people across campus.



Comment 2

Several of my colleagues and I have noticed that AP seems to be pushing back more Direct Payment Requests and Reimbursement Requests lately due to lack of sufficient supporting documentation, even though we've submitted receipts that previously would have been considered "complete" (or at least "good enough to pass audit").

Could you please ask AP to present at the next BPRT meeting to speak about this increased scrutiny? Additionally: They used to have a document on their website detailing what's required for a "complete" receipt, but I haven't been able to find it again. Could you please ask them to make that available?



Send Your Comments and Suggestions!

Financial Services: <u>finsvcs-avp@csus.edu</u>

Or anonymously at: <u>https://csus.co1.qualtrics.com/jfe/form/SV_5nKTgl2</u> <u>eT6kTWvQ</u>



BPRT Comment Card Form Through Qualtrics

Point your smartphone camera



Financial Services



Administration & Business Affairs >> Financial Services >> Business Partners Round Table

Business Partners Round Table

About the Business Partners Round Table

Financial Services is committed to the delivery of the highest quality service in support of University goals. We know that the key to our success is partnering with campus service clients. Working with our University partners, we hope to make the business environment easy to navigate by clearly communicating requirements, simplifying procedures, learning about your needs, and working to design mutually astistatory work processes.

One of the ways in which we are doing to is through the Business Partners Round Table and Business Matters as Sac State. Launched in the fall of 2005, Business Matters as Sac State. Launched in the fall of 2005, sumput partners in their roles as public tetwards. The website contains simple guidelines for conducting various business transactions with Sac State. The first Business Partners Round Table was also held in 2005 and continues to be availastanded quarerly event for compute partners, where updates on topics ranging from audit and insurance to travel, budget and purchasing are shared.

Through the Business Partners Round e current information to help campus b

Have a question or comment for BPR <u>Qualtrics BPRT Comment Card FORM</u>. Your submission can be anonymous or not - your choice!

lope to provide the most

artners succeed in their jobs.

Click Here to get on the BPRT list and have announcements delivered to your Inbox!

Upcoming BPRT Meeting Dates

Agendas & Presentati

February 10, 2022

RECORDING: February 2022 Transcript

February 10, 2022 Agenda #

Welcome & Announcement

Travel Updates PDF

Accounting Services Update

Printing Services & Process

Sac State Waste Changes R

Xerox Contract & Services U

October 20, 2021

RECORDING: October 2021

& Audio Transcript



BPRT Going Forward

Last year we asked you how BPRT should be held in future: In-Person, Zoom, Hybrid



BPRT Going Forward

Overwhelmingly responses requested Hybrid or a Zoom option



BPRT Going Forward

- Unlikely that we will keep hybrid forever
 BPRT = opportunity to network
 - -Hybrid is more expensive tech is pricey
 - Difficult to run the presentation and manage
 Zoom no chat monitoring
 - If BPRT is beneficial to you, we ask you to consider changing your telework days



BPRT in 2022/2023

- 1. Today! In Person
- 2. Thursday, October 13 at 9am, Virtual Meeting
- 3. Wednesday, February 15 at 9am, Virtual Meeting
- 4. Tuesday, April 11 at 9am, In Person



Training Catalog & Trumba

Fall Semester

• AP 101

- Concur for New Users (refresher)
 - Concur for Approvers
- Expenditure Transfer 101 in On-Base
 - Procurement 101



Training Catalog & Trumba

Fall Semester

And announcing Financial Data Warehouse (FDW) 101 Group Training Sessions Now on Trumba!



Training Updates

We will have announcements for Bursars 101 soon!

<u> https://www.csus.edu/administration-business-affairs/financial-services/training.html</u>



Contact Us

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