

Business Partners Round Table

RESET & RECALIBRATE

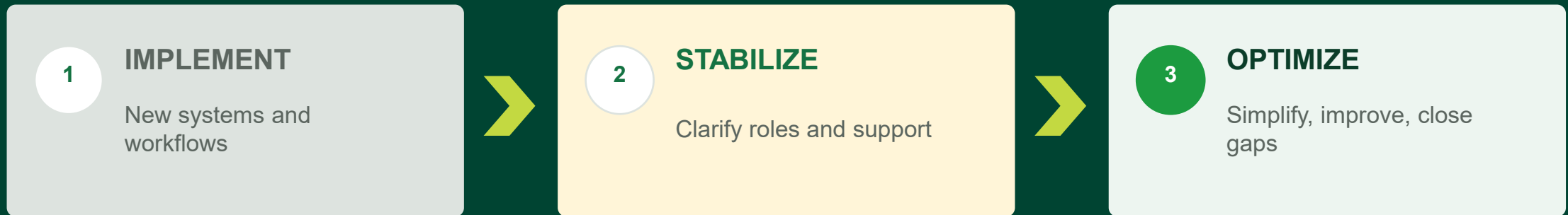
Tuesday, August 18, 2026

From
implementation
to optimization



Reset & Recalibrate

*“Less explaining the friction.
More working together to remove it.”*



The reset applies to Financial Services and to how we work with campus partners.

Changes in Financial Services

BPRT | AUGUST 18, 2026

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Where We Are Now

Major implementations are in place. The work now is to make the experience more stable, clear, and usable.

SYSTEMS

Move from launch mode to stabilization, clearer guidance, and fewer workarounds.

SERVICE

Make support easier to navigate and give one clear answer when offices must align.

STAFFING

Turnover continues to affect continuity and response time while we recruit, cross-train, and document.

Context—not an excuse. The reset applies to how we design support and how resilient our processes are.

What BPRT Will Be Going Forward

- 01 CLEAR AGENDA** Know what we are here to accomplish
- 02 USEFUL UPDATES** What changed, who is affected, what to do
- 03 STRUCTURED Q&A** Answer what we know; capture what needs research
- 04 CLOSE THE LOOP** End with owners, follow-ups, and takeaways

Questions are welcome. Case-specific or unresolved policy questions will be captured and followed up.

Our Working Agreement

FROM FINANCIAL SERVICES

- Clear, usable guidance
- One answer when offices must align
- Say when we do not know—and follow up
- Separate local practice from CO/system constraints
- Own corrections when guidance changes

FROM BUSINESS PARTNERS

- Specific examples and enough context
- Expected versus actual result
- Focus on the process, not the person
- Tell us the impact and whether it is recurring
- Tell us what would make the process usable

Candid + specific is more useful than polite + vague.

What We Heard — and What We're Changing

We reviewed the comments. Rather than spend BPRT answering them one by one, we are using them to identify patterns and improve the process.

RECURRING THEMES

Getting help & escalation

Consistency & transparency

Training & documentation

System / ownership confusion

WHAT CHANGES

FAQs capture individual questions

Support resources expand around recurring needs

Ownership is confirmed before we answer

Patterns move into process improvement / workgroup

The FAQ is posted on the BPRT webpage. Today is about what we do next.

Help Us Make Feedback Actionable

TOO VAGUE

“P2P is inconsistent.”

We cannot investigate a pattern without an example.

GIVE US ENOUGH TO FIND THE ISSUE

- 1 What were you trying to do?
- 2 Where exactly did it break down?
- 3 What did you expect — and what happened instead?
- 4 What was the impact?
- 5 Did it happen once or repeatedly?
- 6 What would have made the process usable?

Specific feedback gives us something we can locate, diagnose, and fix—or elevate.

Where the Issue Lives

Not every problem has the same owner. Our job is to identify the lever before we promise a fix.

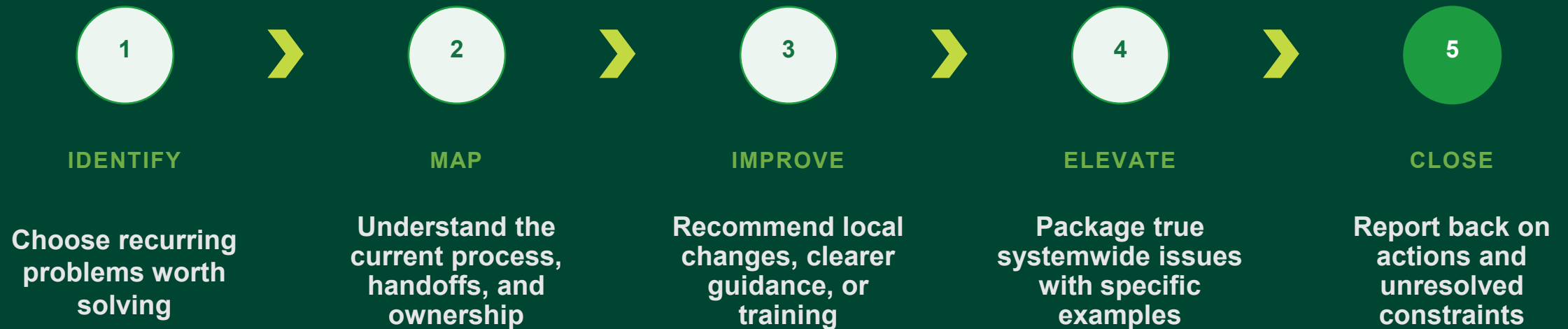
CAMPUS	SHARED	CO / SYSTEMWIDE
● Support channels & service standards ● Local communications / source of truth ● Job aids, training & local guidance ● Local reviewer practices / handoffs	● Supplier onboarding ● Approval workflows ● Cross-office handoffs ● Local process within system rules	● Supplier registration validation ● Centrally governed system configuration ● Systemwide policy requirements ● Platform enhancements

Start with Financial Services. We will identify ownership, act where we can, and escalate when we cannot.

- We are changing our Comment Card Process for BPRT
- Comment Cards will now be collected and responded to in FAQs uploaded to the BPRT webpage.
 - Check out our first one, already uploaded!

Proposed Business Partners Workgroup

A small cross-campus group to work through recurring issues that are bigger than a single ticket or comment card.



Not another standing committee. A problem-focused workgroup with clear outputs and follow-through.

[Interested in participating? finsvcs-avp@csus.edu](mailto:finsvcs-avp@csus.edu)

P2P HELP

What We're Doing Now

One place where your feedback is already changing how we support the campus.

Clearer how-to support • task-based job aids • better routing

P2P Help: ChatGPT

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A how-to resource available now

- General P2P “how do I...?” guidance
- Step-by-step help for common tasks
- Available through your MySacState ChatGPT login

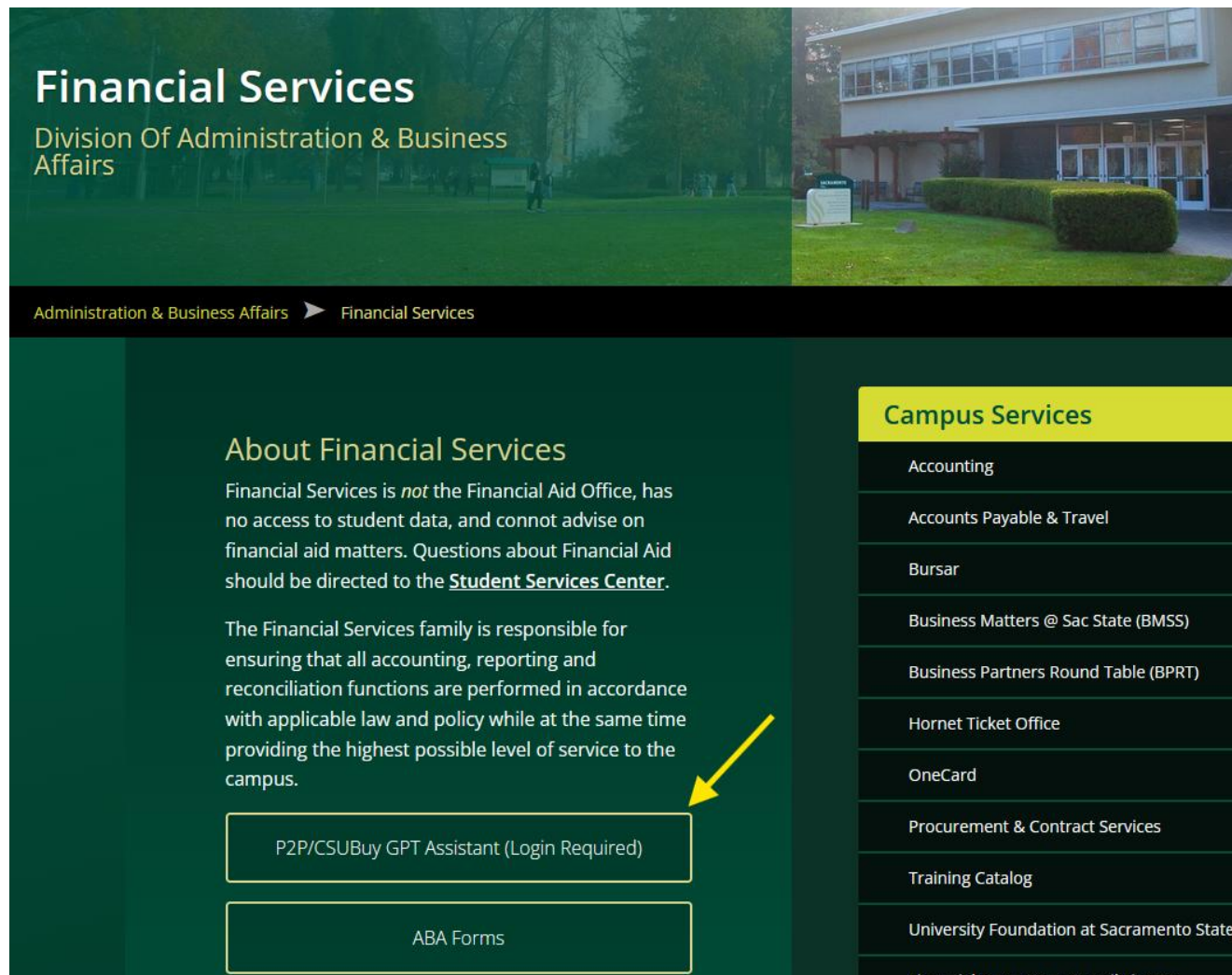
Helpful guidance — not authoritative policy.

Customer-service takeaway

Use the GPT when you need help navigating a routine P2P task. If the answer involves policy, compliance, an exception, or a transaction-specific problem, contact Financial Services.

We would rather help you confirm the answer than have you rely on guidance that may not fit your situation.

How to Access the P2P GPT



Financial Services
Division Of Administration & Business Affairs

Administration & Business Affairs ► Financial Services

About Financial Services

Financial Services is *not* the Financial Aid Office, has no access to student data, and cannot advise on financial aid matters. Questions about Financial Aid should be directed to the [Student Services Center](#).

The Financial Services family is responsible for ensuring that all accounting, reporting and reconciliation functions are performed in accordance with applicable law and policy while at the same time providing the highest possible level of service to the campus.

[P2P/CSUBuy GPT Assistant \(Login Required\)](#)

[ABA Forms](#)

Campus Services

- Accounting
- Accounts Payable & Travel
- Bursar
- Business Matters @ Sac State (BMSS)
- Business Partners Round Table (BPRT)
- Hornet Ticket Office
- OneCard
- Procurement & Contract Services
- Training Catalog
- University Foundation at Sacramento State
- Financial Department Email Listserve

START HERE

**Financial
Services
webpage**



**Log in through
MySacState first.**

Using the P2P GPT Well

GOOD FOR

- Routine how-to questions
- Finding the next step
- Explaining a task in another way
- Figuring out where to start

NOT FOR

- Policy / compliance decisions
- Approving an exception
- A definitive answer on a specific transaction

CONTACT US WHEN

- The answer is unclear
- Your case does not match the guidance
- The issue is unique or doesn't fit a specific process.

The goal is to save you time—Especially given limited resources

A Possible Systemwide Next Step

The Chancellor's Office has expressed interest in a centralized P2P GPT.

If a systemwide tool is developed, we will share the transition and the authoritative source. Until then, the local P2P GPT remains available.

P2P Job Aid Library

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We are building task-based help around the places people actually get stuck.

SHORT VIDEOS

**Quick walk-throughs
for a single task**

STEP-BY-STEP PDFS

**Screenshots and
clear instructions**

NARROW TOPICS

**One job aid = one
problem to solve**

We will prioritize topics based on capacity, recurring questions, rework, and BPRT feedback.

Help Us Build the Job Aid Library

You are learning what works in practice.

If your department has a repeatable process, tip, or explanation that has helped users succeed, share it with us. We can review it, validate it for campus use, and turn it into a job aid.

A good submission tells us:

- What task the user is trying to complete
- Where people commonly get stuck
- The steps that consistently work
- What needs campus validation before publishing

[Jeanne Brewster | brewster@csus.edu](mailto:brewster@csus.edu)

Keep the Feedback Coming

Use the channel that fits the kind of feedback you are giving.

DIRECT FEEDBACK / FOLLOW-UP

finsvcs-avp@csus.edu

Best for questions that need a response, follow-up, or specific context.

ANONYMOUS COMMENTS

[BPRT Comment Form](#)

Best for candid themes, recurring concerns, and suggestions when you prefer not to identify yourself.

For transaction-specific issues, give enough detail for us to locate the issue. Do not include sensitive information in a public forum.

Future BPRT Events

BPRT | AUGUST 18, 2026

FALL 2026

**Wednesday, October
21**

SPRING 2027

**Thursday, February
11**

Tuesday, April 13

FALL 2027

Tuesday, August 17

Thursday, October 14

Register through the [Financial Services Trumba page](#).