Historical Background / APIS Rollout and Pilot

The AP Invoicing Overview (.pptx/286kB) has additional information regarding the project.

Phase 1 – Information Gathering

Accounts Payable, Contracting Services, and the Shared Services Center partnered to solicit campus feedback and input into processes, visit other UCs to learn best practices, and identify stakeholder concerns. Process flows, staffing requirements and system changes were developed. A Strategic Vendor Management team was formed to establish a new menu of payment terms.

Phase 2 – Pilot of units currently supported by the Shared Services Center

The pilot aims to change the way Purchase Order invoices are processed for the units currently supported by the SSC by having them all delivered to a single location (the Shared Services Center). The SSC Finance team will then scan and enter the invoices into KFS for payment. Invoices under $1,000 that are processed by this team will no longer route for Fiscal Officer approval (the Fiscal Officer will receive an FYI in KFS). Invoices over this $1,000 threshold (or ones that require receiving) will still route for Fiscal Officer approval in KFS.

The project team will identify and measure key performance indicators (KPIs), comparing service team to the rest of campus invoice processing, and revise processes as necessary based on feedback received.

Phase 3 – Academic Pilot

Begin to process invoices on behalf of academic units willing to participate as early adopters. Revise process flows to accommodate specialized academic needs such as Uniform Guidance requirements as needed. Continue to measure KPIs and gauge the readiness of the service team to take on the balance of the campus invoices.