



# Managing Travel and Expense Reimbursement in SFS

OSC Fall Conference 2024

# Agenda

- Key Terms and Concepts
- Managing Travel and Expense Reimbursement in SFS
  - Managing Expense Reports
  - Managing Travel Card Charges
- Reminders and Resources
- Questions and Answers

**Note:** This session is an overview of tips and reminders for managing travel and expense reimbursement in SFS. Please enter additional questions you may have into the Webex chat during today's session.



# Key Terms and Concepts

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Speaker Name

# Key Terms and Concepts

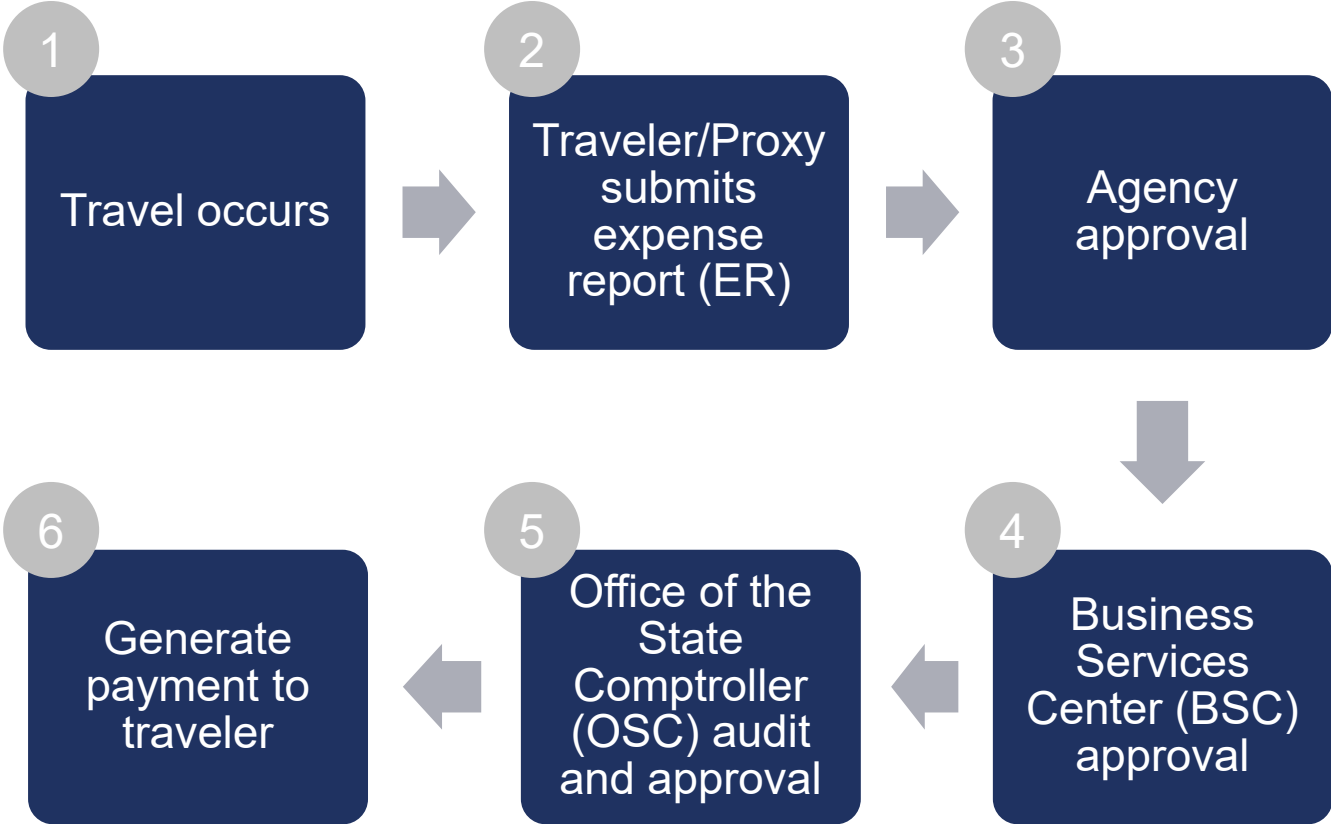
Term	Definition
Expense Report	A travel document that is submitted by a traveler or proxy once a travel-related event is complete. This report captures the actual travel costs and requests reimbursement of expenses.
Traveler	A New York State employee who travels for business-related purposes.
Proxy	User authorized to view, enter, and/or submit expense transactions on behalf of an employee.
Business Purpose	The overall classification of expense documents. This is generally the business reason for travel (e.g., routine travel or conference).
Expense Type	The classification of an incurred expense (e.g., parking, mileage, airfare).
Travel Card (TCard)	A credit card assigned to a traveler for business-related travel expenses.
My Wallet	A tool in SFS that stores credit card transactions and allows the user to reconcile these transactions by applying them to expense reports.
Non-Travel Expense	A job-related expense that is not related to travel. Membership expenses and uniform allowances are examples of non-travel expenses.
Chartfields	The information on the transaction that identifies what budget will be impacted by the transaction. These replace “Cost Centers.”



# Managing Expense Reports

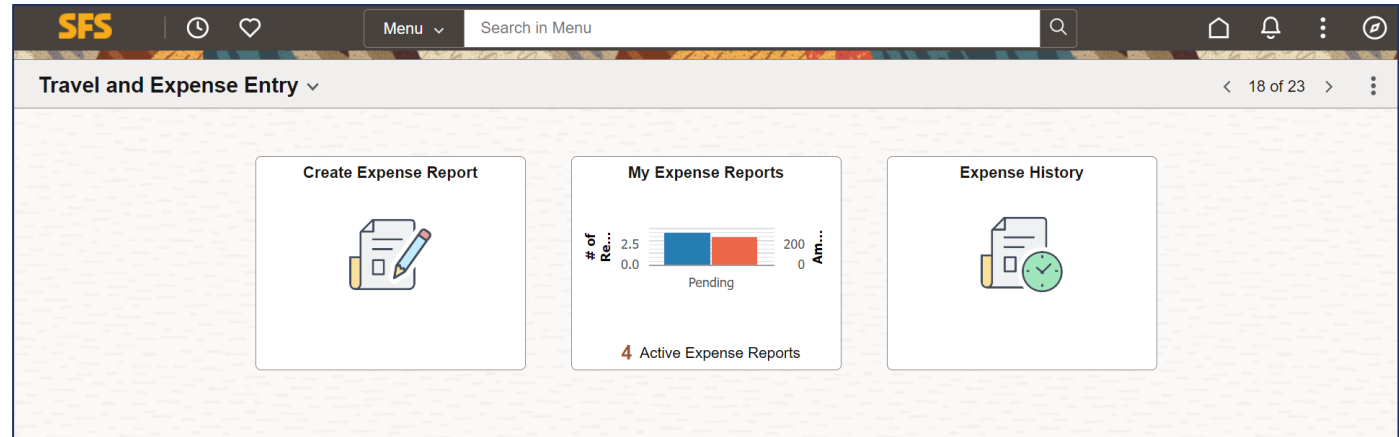
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# Travel and Expense in SFS



# Travel and Expense Entry Homepage

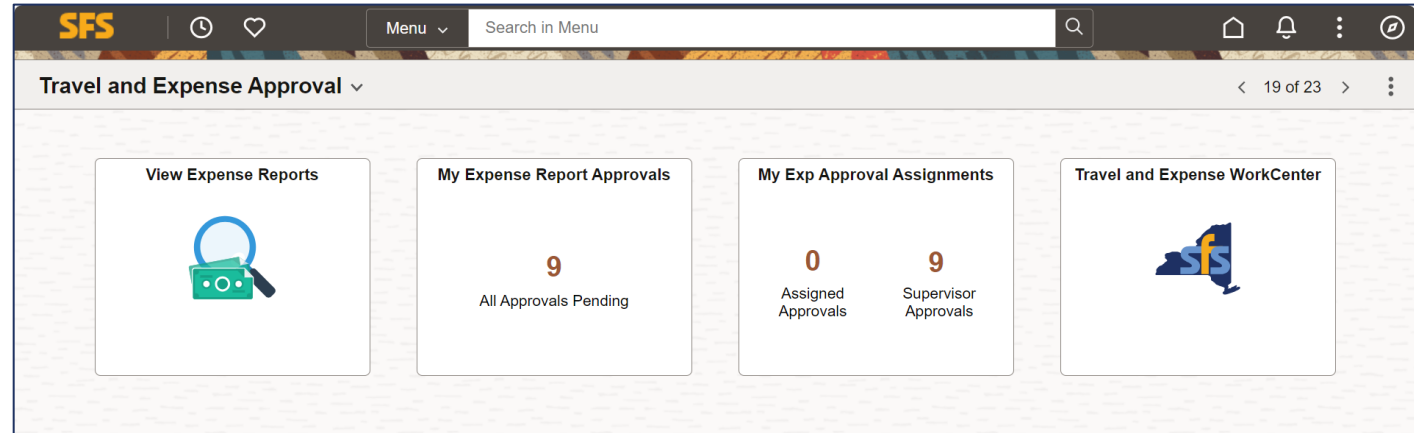
- The **Travel and Expense Entry** homepage is used by state employees and proxies to request reimbursement for business expenses incurred while traveling.



- **Create Expense Report** tile provides access to expense entry pages where travelers or proxies can begin documenting business travel expenses for the purpose of reimbursement.
- **My Expense Reports** tile provides access to the My Expense Reports page where travelers or proxies can inquire upon the status of an expense report.
  - Only shows active expense reports; does not include paid reports.
- **Expense History** tile provides access to the Expense Report History page.
  - Offers complete history of expense report entry, including paid reports.
  - Offers complete history of travel card charges.

# Travel and Expense Approval Homepage

- The **Travel and Expense Approval** homepage is used by supervisors and approvers to review and take approval action on submitted expense reports.



- **View Expense Reports** tile is used to search for a specific expense report pending the approver's approval.
- **My Exp Approval Assignments** tile shows all expense reports assigned specifically to the approver.
- **My Expense Report Approvals** tile shows a count of all expense reports pending at one or more of the approver's assigned approval levels.
- **Travel and Expense WorkCenter** tile is used for quick access/links to travel and administration queries and reports.



# Receipts

When do I need to attach a receipt to my expense report?

- Travelers must provide receipts with expense reports in accordance with the [Office of the State Comptroller's \(OSC\) policy](#).
  - Receipts are required for all TCard charges/purchases.
- Receipts need to include the final expense price to be accepted.
  - Receipts that only include a boarding pass, a hotel reservation, an anticipated return time, or an estimated cost for vehicle rentals will not be accepted.
  - For additional information on receipt requirements, please refer to OSC's [Travel FAQs](#).

Expense Type	Documentation Required
Charge on the State Travel Card	Receipt
Transportation by Common Carrier (e.g. train, bus, airplane, subway)	Ticket stub if purchase price is printed on the stub; receipt and ticket stub if purchase price is not printed on the stub
Taxi	Receipt
Rental Car	Receipt showing return time
Tolls - EZ Pass	EZ pass statement with applicable charges indicated
Tolls - Cash	Receipt
Gas	Receipt
Day Trip Meals - Receipted	Receipt
Hotels - Receipted	Receipt
Miscellaneous and incidental expenses	Receipt

Screenshot from OSC Travel Manual, page 12.

# Expense Report Statuses



Expense Report Status in SFS	Status Definition	How to Modify the Expense Report
Pending	The report is in a traveler's queue and has either not yet been submitted or has been denied.	Travelers or proxies can make updates to a Pending expense report.
Submitted	The report has been submitted to a traveler's supervisor and is now in the supervisor's queue.	If the supervisor has not yet taken action on the expense report, it can be <b>Withdrawn</b> and placed back in the traveler's queue for editing. The supervisor can <b>Deny</b> the expense report so it will be placed back in the traveler's queue to modify.
In Process	The report is either with the TE Approver or TE Approver 2.	Wait for the approver to <b>Deny</b> the expense report back to the traveler. BSC Customer Agencies: Contact the BSC to have the report denied back, if report is pending at the BSC (TE Approver 2) or OSC level.

# Expense Report Statuses – Continued

Can I modify a report after I've submitted it?

Expense Report Status in SFS	Status Definition	How to Modify the Expense Report
Returned/ Denied	The report has been sent back to the traveler's queue by someone in Workflow and will need to be modified or corrected and resubmitted.	Travelers or proxies can make updates to a Denied expense report and resubmit so it will be back in the supervisor's queue.
Rejected	The report cannot be modified or resubmitted.	Modifications cannot be made to a Rejected expense report.
Paid	The report has been approved at all levels, including OSC, and payment has been sent.	Modifications cannot be made to a Paid expense report.

# Find the Reason for Denial on an Expense Report



- If an approver (including agency, BSC, and OSC approvers) needs to deny an expense report, they are required to enter a justification comment.
  - This comment will include the reason for denial. Travelers should review this information in order to make changes and resubmit.
- To find the reason for denial for an expense report, click on the **My Expense Reports** tile, navigate to the **Returned** section, and click on the expense report you wish to open.
  - **Note:** The My Expense Reports tile can also be used to view the statuses of other expense reports in workflow under the Awaiting Approval and Pending Payment sections.

My Expense Reports	
JEROME DOE	
XXXXXXXXXXXXX Statewide Financial System	
Drafts and Templates	0
Not Submitted	0
Awaiting Approval	0
<b>Returned</b>	<b>1</b>
Pending Payment	1
View All	2

# Find the Reason for Denial on an Expense Report – Continued



- Navigate to the Expense Summary page on the expense report. The **Approval Status** section to the right of the page will show you the approval history of the expense report, including the denial reason for the expense report.
- BSC Customer Agencies: For questions about a denied expense report, contact the BSC Travel Team:  
[BSCfinance@ogs.ny.gov](mailto:BSCfinance@ogs.ny.gov) (include “Travel” and the expense report ID in the subject line of your email) or 518-457-4272.

**Expense Summary**

Annual Conference [edit]  
JOHN DOE

General Information View Details Withdraw  
Last Saved 08/13/2024 12:58PM

Expense Report Summary	
Total (16 Items)	1,612.59 USD
Employee Credits	315.35 USD
Prepaid Expenses	1,297.24 USD
Due to Employee	315.35 USD

Additional Information

- View Analytics >
- Notes 2 >
- View Printable Report >

**Approval Status**

Report ID 000000000 Submitted for Approval

- Submitted  
JOHN DOE  
Employee 07/23/2024 1:06:20PM
- Denied  
JANET DOE  
HR Supervisor 07/31/2024 1:22:10PM  
Please update for: 1. Please split the out-of-state taxes and fees on the lodging receipt and categorize them as Out-of-State Taxes & Charges for Lodging. For more information on how to split charges use SFS Coach Training, key words Expense Split Wizard. 2. Attach an itemized airfare receipt that shows the agent fee and airfare costs for 318.45 and \$22.44. An estimated cost cannot be substituted for a receipt. 4. Attach the receipt for \$22.44 for the expenses in the report. If you are unable to obtain the receipt(s), provide a justification in the missing receipt section. 5. Change the PerDiem-Recpted Ovrngt Meals for 6/11 and 6/12 to reflect \$90.00 (dinner portion).
- Resubmitted  
JOHN DOE  
Employee 08/07/2024 1:56:57PM
- Approved  
JANET DOE

# Approving Expense Reports: Budget Check



- The Budget Check status of an expense report is available on the **Approve Expense Report – Expense Summary** page for approvers to check before taking approval action.
- If an expense report does not pass budget check, it cannot be approved and will stay in the supervisor’s worklist until the supervisor takes action to deny the report back to the traveler to update the accounting, or to contact their agency’s budget office to increase the budget in the fund or appropriation.
  - Expense reports would fail budget check if the Accounting Details entries (e.g., Budget Reference, Program, Project, Activity Code) are incorrect. If you know what the entries should be, you can correct the issue yourself before approving.

**Commitment Control**

[Help](#)

**Commitment Control Details**

Source Transaction Type	Expense Sheet
Budget Checking Header Status	Not Budget Checked
Commitment Control Amount Type	Encumbrance

Override Transaction

[Budget Check](#) ⓘ


Go to Transaction Exceptions

[OK](#) [Cancel](#)

[Go To Activity Log](#)

**Note:** In SFS Production, the budget checking process of travel documents runs hourly, Monday through Friday, from 8:00 a.m. through 5:00 p.m. For example, If an expense report is submitted for approval at 8:57 a.m., it will be budget checked in the 9:00 a.m. process.

# Email Notifications



How do I know  
when I have reports  
to approve?

- Travelers receive email notifications if an expense report is denied or rejected.
  - If a proxy submitted an expense report on behalf of a traveler, they also receive email notification of denied or rejected expense reports.
- Supervisors receive daily email notifications when expense reports are ready for their review.
  - This is a once-daily email that includes a list of new expense reports ready for their review.
  - Supervisors only receive email notification if they have not taken action on an expense report for 24 hours after its submission.
- On a monthly basis, travelers and their SFS travel supervisors receive email reminders for travelers' unreconciled Travel Card charges at least 30 days from the posted date.

# Confirming a Valid Email Address

How can I add my email address in SFS?

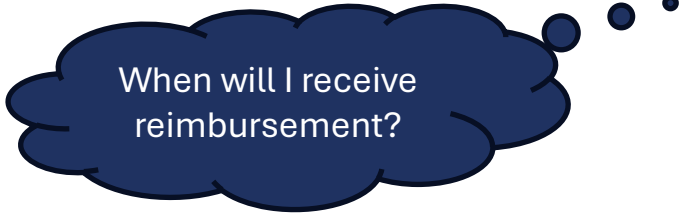
- Travelers, proxies, and supervisors should confirm they have a valid email address in SFS to ensure they are receiving emails related to outstanding TCard charges, denied expense reports, or expense reports pending their review as a supervisor.
- Navigation to update emails in SFS:  
NavBar > Menu > My System Profile
  - Note:** Users may need to scroll to the bottom of the page, to view the **Email** section.

The screenshot shows the 'User Self Service' profile page. The 'Email' section at the bottom is highlighted with a red border. It contains a table with columns for 'Primary Email Account', 'Email Type', and 'Email Address'. The 'Primary Email Account' is set to 'Yes', 'Email Type' is 'Work', and 'Email Address' is 'test123@dec.ny.gov'. A 'Save' button is located below the table.

Primary Email Account	Email Type	Email Address
<input checked="" type="checkbox"/>	Work	test123@dec.ny.gov



# Reimbursement of Travel



When will I receive reimbursement?

- Travelers usually receive reimbursement within a few business days of OSC receiving and approving the expense report.
- Travelers receive Travel & Expense reimbursement the same way they receive their paycheck (e.g., a physical check or through direct deposit).
  - Travel reimbursements are not included in a traveler's paycheck, but are rather sent as a separate payment.

# Viewing Payment Status



- From the Expense Report History page, use the Filter icon to view expense reports in **Paid** status and select the expense report you would like to open.
- On the Expense Summary page of the report, select the View Printable Report option under the Additional Information section to view payment information.
  - The **Expense Report Summary** page will open in a new window. You can view payment information, including payment method, creation date, reference, and amount, by expanding the **Payment Information** section.

The screenshot shows the 'Expense Report Summary' page. At the top, it displays 'Report ID 0002174338', 'Total Expenses 139.96', 'JOHN DOE', 'N00000000', and 'DEC01'. Below this are buttons for 'Expand All', 'Collapse All', 'Print', and 'Personalize'. A list of sections is shown on the left, with 'Payment Information' expanded. The expanded section contains a table with the following data:

Payment Method %	Payment Creation Date %	Payment Reference %	Payment Amount %
1 ACH	02/07/2024	XXXXXXXX	139.96

- The Payment Method will either say Check for checks or ACH for Direct Deposit.
  - For ACH, a reference number will be listed which can be used by the bank to locate the payment if needed.



# Managing Travel Card (TCard) Charges

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# Travel Card Charges in SFS

- A NYS Travel Card, or TCard for short, is a credit card assigned to an individual for business-related travel expenses.
  - Travelers use the TCard to pay appropriate expenses while traveling on official state business to minimize out-of-pocket costs.
  - Only business expenses are allowed on the TCard (e.g., meals, parking, hotel stays, train/bus/airfare tickets).
    - TCards should not be used for personal expenses.
- If an employee has an assigned TCard, any charges on that card will appear in My Wallet via a periodic feed from the credit card company.
  - Charges are loaded into SFS Tuesday through Saturday.
- My Wallet holds all TCard charges that have not been assigned to an expense report.
  - All TCard charges must be reconciled within 30 days of the end of the travel event via SFS expense report submission.

# TCard Charge Statuses

TCard Status in SFS	Definition	Reminders
Unassigned	The TCard charge has not yet been imported into an expense report.	Unassigned TCard charges can be reviewed via the <b>Expense Report History</b> tile, before expense report creation.
Assigned	The TCard charge has been imported into an expense report.	Travelers or proxies can review the <b>Expense Report History</b> tile to confirm that a TCard charge has been imported/assigned to an expense report.
Unreconciled	The TCard charge may be on an expense report, but the expense report has not been paid yet.	TCard charges are not considered fully reconciled until the expense report is paid by OSC.
Reconciled	The expense report the TCard charge is on has been paid.	Travelers or proxies can review the <b>Expense Report History</b> tile to confirm that a TCard charge was imported on an expense report that is in Paid status.

# My Wallet



- TCard charges must be imported into an expense report from My Wallet so the charge is properly identified as a Travel Card expense.
  - When creating an expense report, travelers must have available TCard charges in order for the **Add from My Wallet** option to appear.
- Wallet Charges cannot be imported within an Expense Report Draft – the Draft needs to be built into an expense report before charges can be added.
  - Expense Report Drafts are used to enter data for in-state travel and personal funds only (i.e., no out-of-state travel or credit card charges).

**Expense Report General Information**

Report 0000000001  
JOHN DOE

[+ Add Expense](#) [Add from My Wallet \(9\)](#)

**General Information**

\*Business Purpose

\*Description

Default Location Description

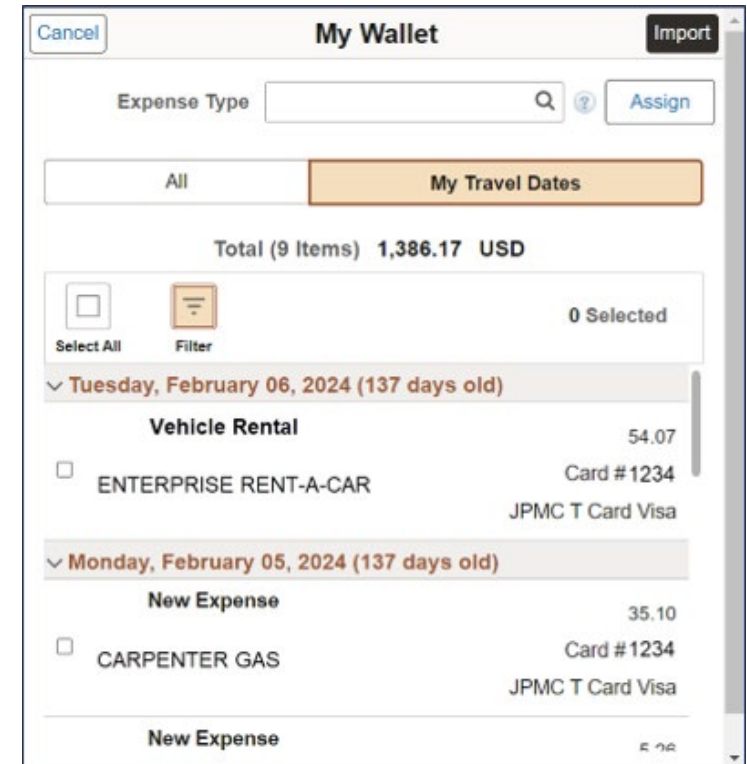
[Attach Receipt](#)

[Accounting Defaults](#)

# My Wallet – Continued



- TCard charges need to be **assigned** an expense type before they can be **imported** into an expense report.
  - Some charges will appear with an expense type while others will display “New Expense,” meaning you will need to assign a type.
  - You can select multiple charges to assign the same expense type by selecting the checkbox in each applicable row.
  - You cannot change the expense type of a charge that is already in an expense report. To modify, you need to delete the expense line of the charge and change the expense type in My Wallet.
- By default, your view of My Wallet will be within the date range of your trip on “My Travel Dates.”
  - You can also view “All” which will display all unreconciled charges.
  - You have the ability to filter by specific criteria (e.g., Date, Expense Type).



# Expense History Preferences

Do expenses get deleted?

- From the **Actions List** (icon with 3 vertical dots), you can update your Expense History preferences by selecting the **My Preferences** option.
- From this page, you can update the Displayed History (in months) for viewing expense reports and My Wallet charges.
- **Note:** TCard charges and expense reports are never removed from the system - if you're unable to locate a TCard charge or an expense report, you may need to update filters, date ranges, etc.

The screenshot shows the 'My Preferences' interface with the 'Expense History' section selected in the left sidebar. The main content area is titled 'Expense History' and includes a 'Save' button in the top right corner. It is divided into two sections: 'Expense Report Search Options' and 'My Wallet Search Options'. Each section contains a 'History to Display (In Months)' input field set to '60' and a 'Status Selection' table with 'Yes' checkboxes for various report and wallet statuses.

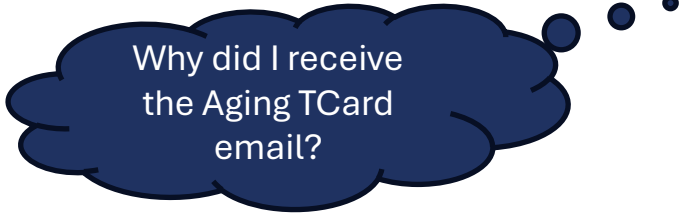
Expense Report Search Options	
History to Display (In Months)	60
Report Status Selection	
Closed	Yes <input type="checkbox"/>
Denied	Yes <input type="checkbox"/>
Approved	Yes <input type="checkbox"/>
Awaiting Approval	Yes <input type="checkbox"/>
Not Submitted	Yes <input type="checkbox"/>

My Wallet Search Options	
History to Display (In Months)	60
Wallet Status Selection	
Deleted	Yes <input type="checkbox"/>
Assigned	Yes <input type="checkbox"/>
Unassigned	Yes <input type="checkbox"/>




# Aging Wallet Charges Emails



Why did I receive the Aging TCard email?

- On a monthly basis, emails are generated from SFS for unreconciled TCard charges at least 30 days from the posted date. These emails are sent to the email address for the SFS user associated with the Employee ID on that charge and the email address of the user's SFS Travel Supervisor.
  - TCard charges are not considered reconciled until the expense report the TCard charge is on has a Paid status.
- Sometimes, you may receive an Aging Wallet Charges Email if you made a purchase for a trip that hasn't occurred yet (i.e., airline tickets or hotel reservations). You do not need to take any action with these expenses until after travel occurs, where you should create an expense report and import these TCard charges as soon as possible.
  - OSC policy states that expense reports must be submitted within 30 days of the travel event.

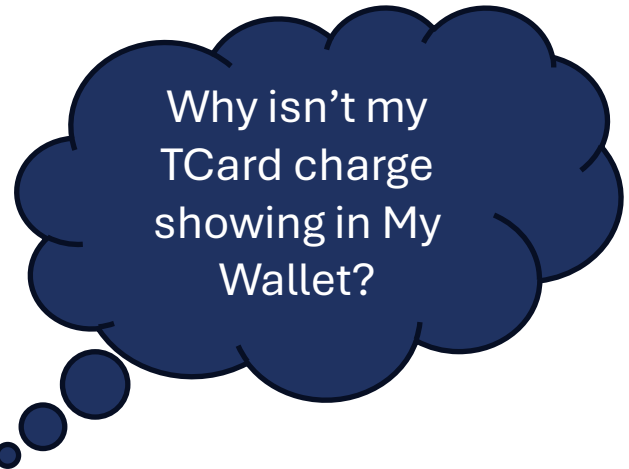
# Troubleshooting Common TCard Scenarios



What if I accidentally used my TCard for a personal purchase?

- If you accidentally used your TCard for a non-business-related charge, you must create a new expense report and assign the charge as Non-Reimbursable. After importing the charge into the report from My Wallet, you'll need to provide an explanation of the charge in the Description area on the expense line. You must also provide the receipt for the non-reimbursable expense.
  - The amount associated to a Non-Reimbursable Expenses expense type creates a receivable due from the employee to the state. You must offset any amount "Due to State" (DTS) within an expense report by offsetting the DTS amount with reimbursable expenses, or by submitting a check.
  - You also have the option to import the charge into an existing expense report, so the charge will subtract from what you are owed on the report.

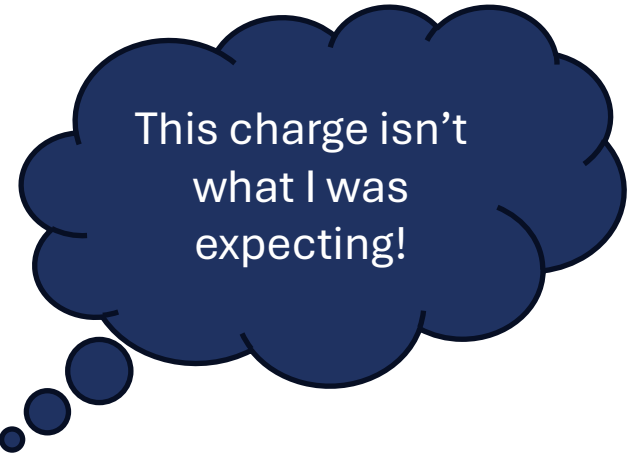
# Troubleshooting Common TCard Scenarios - Continued



Why isn't my  
TCard charge  
showing in My  
Wallet?

- Charges can take up to a week to appear in the Wallet.
  - Charges are loaded Tuesday through Saturday.
  - If an expected charge is not showing in the Wallet, confirm the charge is on your JP Morgan Chase card statement before contacting the SFS Help Desk for further assistance.

# Troubleshooting Common TCard Scenarios – Continued



This charge isn't  
what I was  
expecting!

- If a charge in the Wallet is different than what you were expecting, travel card holders should first check their statement and then contact the vendor to reconcile the issue.
  - If the issue cannot be resolved by contacting the vendor, travel card holders should contact JP Morgan Chase directly. If the issue persists, contact your agency's Finance Office.



# Reminders and Resources

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# Reminders for Agency Administrators

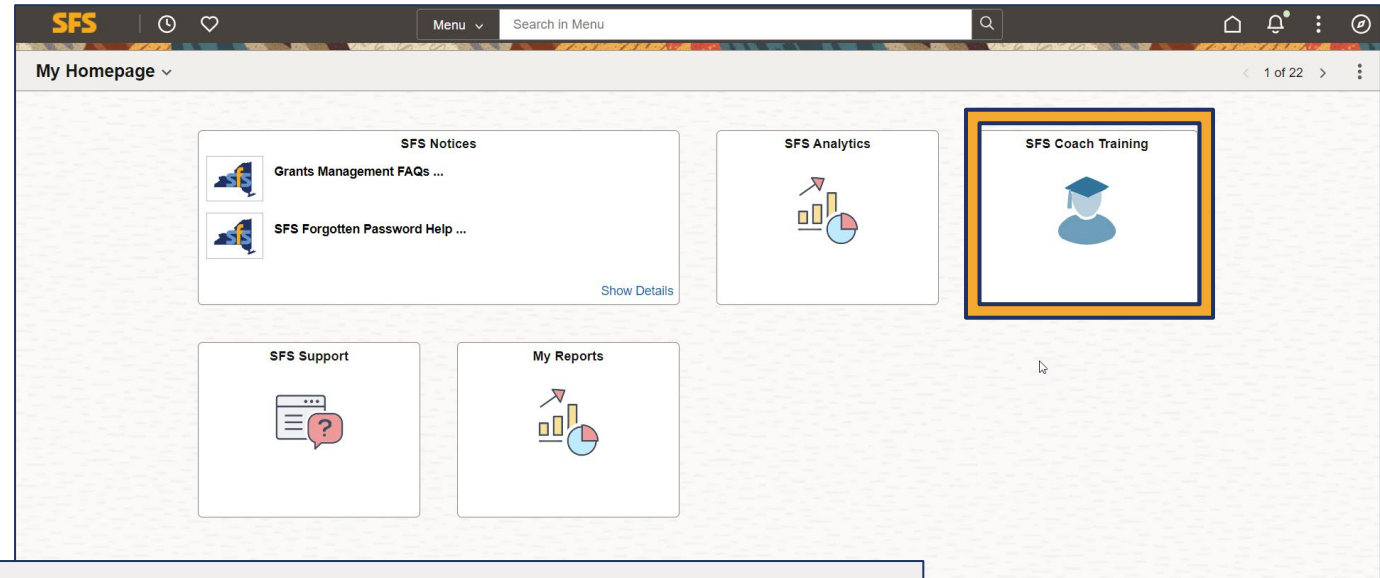
- Traveler access and profiles should be kept current in SFS to facilitate timely submittal and approval of expense reports. Individuals assigned Administrator roles in SFS (e.g., Employee Data Administrator or Agency Security Administrator) have the ability to manage traveler roles, profiles, and troubleshoot workflow issues. The best way to ensure this information is accurate and up-to-date is for Administrators to work closely with their Finance Office and Human Resources (HR) department.
- Employee Data Administrators (EDAs) are responsible for maintaining traveler profile information in SFS. Having a process in place at your agency where HR notifies the EDA of employee changes will facilitate timely updates in SFS.
- Agency Security Administrators (ASAs) should use the Agency Security WorkCenter to monitor missing email addresses and work with travelers and approvers to make updates.
  - Each individual is responsible for maintaining their own, accurate email address in the system. If no email or an invalid email is in SFS, the traveler will not receive system-generated emails related to outstanding Travel Card charges or denied expense reports.

# Contact Information for Support

- For policy related questions, review published travel guidance (agency travel policies, OSC Travel Manual, GFO, etc.).
- For system issues, contact the SFS Help Desk: [helpdesk@sfs.ny.gov](mailto:helpdesk@sfs.ny.gov); 518-457-7737 or 877-737-4185 (toll free); or via the SFS Support tile.
- BSC Customer Agencies:
  - For questions about a denied expense report, contact the BSC Travel Team: [BSCfinance@ogs.ny.gov](mailto:BSCfinance@ogs.ny.gov) (include “Travel” and the expense report ID in the subject line of your email) or 518-457-4272.
  - For questions regarding Travel Cards, contact the BSC Credit Card Team: [BSCfinance@ogs.ny.gov](mailto:BSCfinance@ogs.ny.gov) or 518-457-4272.

# SFS Coach Training

- Training for all SFS functionality is available in SFS Coach Training via the **SFS Coach Training** tile on My Homepage.
- Additional travel training is available by selecting **Travel and Expenses** from the **Topic** dropdown.



## SFS Coach Training

### Search User Training and Materials

- To select a **Topic** or **Training Type**, use the drop-down lists.
- To search by the name of the material, type directly in the **Training Material** field or use the **Training Material** look-up feature by clicking on the magnifying glass.
- **Keyword** search can be used with or without selecting any other search fields.
- Leaving all fields blank brings back all results; additional criteria returns more specific results.

Topic  ?

Training Type  ?

Training Material  ?

Keyword(s)  ?



# Travel and Expense Quick Start Center

- Available directly within SFS Coach Training, Quick Start Centers (QSCs) organize popular training material in an approachable and intuitive way to help users quickly and easily find materials they need to perform their work in SFS.
- The Travel and Expense QSC includes introductory information about Travel and Expense and links to Featured Trainings such as handbooks, job aids, and videos.
  - Click the **Are you a Traveler or Approver of Travel Reimbursements?** dropdown to open the Travel and Expense QSC and review the featured materials within each tab.

**Quick Start Centers**

Are you new to SFS? ▾

**Are you a Traveler or Approver of Travel Reimbursements?** ▴

- About this Service**
- Submit Requests for Reimbursement
- Approve Requests for Reimbursement

Do you submit Purchase Requests or make Purchases? ▾

**About this Service**

The Travel and Expense (T&E) module in SFS is used by employees to submit requests for reimbursement for business expenses incurred while traveling. Expense reports are used to reconcile travel card charges and out-of-pocket expenses. The T&E module is also used to request reimbursement for certain non-travel related business expenses such as uniforms and subscriptions.

For policy guidance, refer to the [Office of the State Comptroller \(OSC\) Travel Manual](#). This manual assists agencies, employees, and certain public officials understand and apply the State's travel rules and regulations and to provide instructions regarding reimbursement for expenses while in travel status.

# SFS Reference Guides

**Troubleshooting Tips for SFS Users**

This guide provides a list of basic troubleshooting tips for all Statewide Financial System (SFS) users.

### Unable to Log In to the System?

If you experience issues logging into SFS, please:

- Confirm that you are accessing the correct URL.
  - SFS Agency Portal: <https://fns.sfs.ny.gov>
  - SFS Vendor Portal: <https://seupplier.sfs.ny.gov>
  - Customer Portal: <https://customer.sfs.ny.gov>
- Confirm that you are correctly entering your User ID and password.
  - Use caution when cutting and pasting to ensure no extra spaces or characters are in the User ID and password fields.
- Clear your cache/Internet browser history and try logging into SFS again. Request that cookies, cached images and files, passwords and other site data be clear.
  - Be sure to clear cache for "all-time", not just for a recent time frame.
  - Once cleared, close all browser windows, and retry.
- Check which browser you are using.
  - SFS encourages using Google Chrome or Microsoft Edge.

If you entered an incorrect password multiple times or haven't logged into SFS in awhile, your account may be locked:

- Agency users:** Work with your internal Agency Security Administrator (ASA) team. If you do not know your ASA, reach out to your supervisor or Agency Coordinator. Let the ASA know that your password doesn't work, and you may be locked out. The ASA can reset your password and/or unlock your user credentials as needed.
- Vendor users:** Work with the Delegated Admin associated with your organization. The Delegated Admin can reset your password and/or unlock your user credentials as needed. If you do not know who your Delegated Admin is, please contact the Primary Contact associated with your organization.
- Customer users:** Work with your Customer Admin. The Customer Admin can reset your password and/or unlock your user credentials as needed. If you are a Customer Admin who needs your password reset or credentials unlocked, please work with the agency that you are doing business with.

### Need Assistance with the System or a Functional Issue?

If you experience system or functional issues and need assistance from SFS, first clear your cache, close your browser windows and retry. If the issue continues, please contact the SFS Help Desk directly:

- The SFS Support tile in the SFS Agency, Vendor, and Customer Portals
- Email: [HelpDesk@sfs.ny.gov](mailto:HelpDesk@sfs.ny.gov)
- Agency and Customer Phone: 518-457-7737 or 877-737-4185 (toll-free)
- Vendor Phone: 518-457-7717 or 855-233-8363 (toll-free)

Please include as many details as possible when contacting the Help Desk, including "How, What, Where, When, and Who":

- A detailed description of the issue.
- The SFS User ID you were using when you encountered the issue.
- The date and time you encountered the issue.
- The name of the job aid or reference material that you were following when you encountered the issue (if applicable).
- The name of the page you were on when encountering the issue.
- Impacted transaction IDs (if applicable).
- Screenshots of the entire page where you are experiencing trouble including the URL and any error messages you are receiving (if applicable).

The [Troubleshooting Tips for SFS Users](#) guide provides a list of basic troubleshooting tips, reminders, and contact information for users who are unable to log in to the system or need assistance with the system.

**SFS Agency Support Guide**

This reference guide is intended to assist with common questions you may have while using SFS to complete your daily work. Click a question below to learn how to proceed. For general SFS troubleshooting tips, please refer to the [SFS Troubleshooting Guide](#).

- Do you need to update an SFS user account profile?
- Do you have a question about SFS access?
- Do you need access to the SFS Agency Business Process (ABP) test environment?
- Do you have an issue with a transaction that has been submitted for review?
- Do you need access to SFS Secure?
- Do you need Vendor related assistance?
- Do you want to access SFS training material?
- Do you need travel or expense reimbursement assistance?
- Do you need access to FileNet for Purchase Order Change Notices / Procurement Card (PCard) Administration?
- Do you have a question about budget policy, procedures, or reporting requirements?
- Do you have a question about statewide accounting policies and procedures?

SFS Coach Training is a repository of all SFS training for new and experienced users. The material in SFS Coach Training includes job aids, reference guides, videos, tools, and templates. SFS Coach Training is available to all individuals with an SFS Agency Portal login. To access SFS Coach Training, log into the **SFS Agency Portal** and click the SFS Coach Training tile from My Homepage or open the NavBar and click the SFS Coach Training icon from any page.

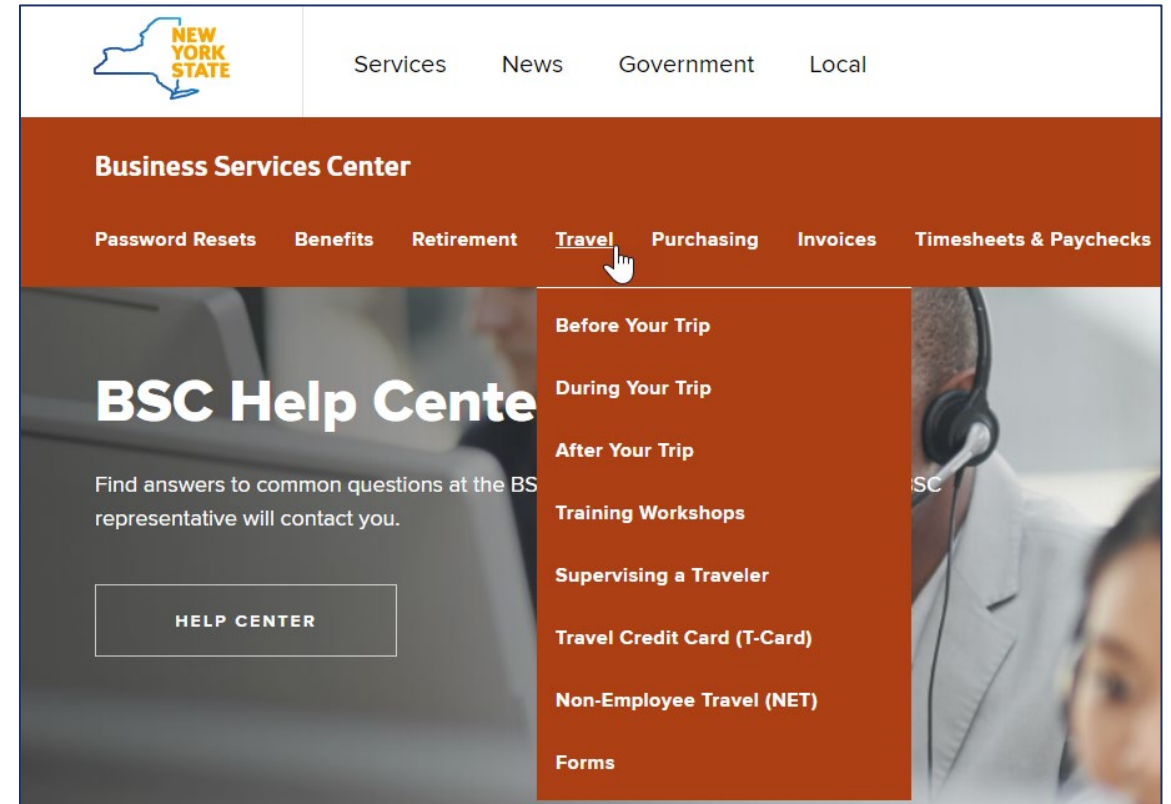
[SFS Agency Portal](#)

The interactive [SFS Agency Support Guide](#) provides guidance regarding SFS access and updates to SFS user accounts.

Both guides are available in SFS Coach Training by searching **Statewide Financial System** in the Topic search field and **Reference Guide** in the Training Type search field.

# BSC and OSC Travel Resources

- BSC Website: [bsc.ogs.ny.gov](https://bsc.ogs.ny.gov)
- OSC Website: [osc.state.ny.us](https://osc.state.ny.us)
  - OSC Travel Policy:
    - [Guide to Financial Operations Section XIII.1 - Employee Expense Reimbursement](#)
    - [Travel Advisories](#)
    - [Travel Manual](#)
    - [Travel FAQs](#)



# Questions and Answers