

# Shared Service Centers

Communication Ambassadors Meeting

March 27, 2013



# Today's Discussion

- LAS-SSC Go Live
- LAS-SSC Manager Positions
- SSC Activities
- Processes, Roles and Responsibilities
  - HR: Recruiting and Onboarding
  - Time Reviewer
  - Accounting Support
  - Purchasing
  - Travel and Expense
  - Scholarships and Tuition
  - Departmental Deposits
- Transition Activities

# LAS-SSC Manager Positions

A HR Manager, Research Manager and Finance Manager will be hired before the wave 2 go live on July 1.

	YEAR 1										YEAR 2
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	Year 2	
<i>Initial Site: Liberal Arts and Sciences SSC</i>											
Process Review and Design	[Bar from Oct to June]										
Activity Assessment	[Bar in Oct]										
Leadership Committees Meet*		[Bar from Nov to May]									
LAS-SSC Process Review				[Bar in Jan]							
Wave 1: Humanities, Arts & Honors						3/18 go live					
Wave 2: Social & Behavioral Sciences, Hall Center, IPSR									7/1 go live		
Wave 3: International & CLAS Administration										[Bar in Nov]	
Wave 4: Natural Sciences and Math										[Bar in Dec]	

\* The College, Hall Center and IPSR will each have a leadership committee to decide staffing.

Nov. go live  
Dec. go live

**To allow for review of research processes, the Research Manager position will be posted this week and will close April 12. The Finance and HR Managers will be posted April 1 and will close April 26, after all staff are notified of SSC staffing assignments,**



# The Liberal Arts and Sciences Shared Service Center is OPEN!



Christina Ruiz  
Dana Ingkatanuwat  
Dawn Hawkins  
Jessica Fell  
Karla Williams  
Lee Goetz  
Lene Brooke  
Rhonda Cook  
Robin Holladay  
Ruth Allenbrand  
Timothy Spencer

Visit us at 50 Strong Hall  
and online at [www.ssc.ku.edu/las](http://www.ssc.ku.edu/las)

# SSC Activities

Human Resource, Accounting and Post-Award activities will move to the SSC.

## Human Resources

Support all of the department's hiring needs, including:

- All aspects of the recruiting process
- All components of the University-wide onboarding process
- Perform the Time Reviewer role
- Collection of completed performance management forms for USS staff

## Accounting

Support all of the department's Accounting Needs (state, KUEA and sponsored funds)

- Provide routine and as-needed reports on the department's budget status
- Process department purchases
- Pay invoices and process reimbursements
- Act as travel proxy for department
- Support the identification and processing of scholarships
- Create invoices, track shipping, billing and deposits for departmental programs
- Process departmental deposits

## Post Award

Support the administration of sponsored awards:

- All related accounting and HR support
- Monitor award balances, progress report due dates; apply for award renewal, conduct allowability reviews and facilitate effort reporting
- Request no cost extensions, budget revisions, provisional requests or award closeouts
- Monitor cost share agreements for both payroll and non-payroll expenses

# Process and Roles – HR

SSC HR Program Assistants will support the full range of hiring and onboarding activities for the department.



The SSC HR Program Assistants will provide support for the full timeline of activities involved in departmental hiring:

- Assist with the job description
- Post the position and place advertisements, and enter all data into TAM
- Facilitate the VISA process
- Support the search committee, including scheduling and attending meetings, if desired
- Complete the KU onboarding process at 50 Strong Hall (ensuring all paperwork is complete)
- Process GTA, GRA and GA contracts
- Process changes to an individual's employment status (FTE, salary, etc.)

Central HR will continue to provide guidance on the following:

- Generation of Offer Letters
- Disciplinary Matters
- Workers Compensation Questions
- Benefits Questions
- FLSA Determinations
- Voluntary Separation Information

Employees will continue to use Employee Self Service to update personal information.

ROC staff will transition to the SSC; your SSC HR Program Assistant will support your recruiting and onboarding needs (the SSC HR Coordinators and Manager will be involved in all faculty searches).

# Process and Roles – Time Reviewer

Moving the time reviewer function from the department to the SSC will enable staff to take leave during time submission days.

**SSC HR Program Assistants are responsible for:**

- Following up weekly with staff who are missing time in the system to proactively correct
- Following up weekly with supervisors who are missing approvals in the system to proactively correct



SSC staff will follow up on any outstanding time in the HR/Pay System weekly.

# Process and Roles – Accounting Support

SSC Accounting Specialists will ensure that the Chairs and Directors they serve receive frequent accurate information about the state of their all funds budget.

**SSC Accounting Specialists are responsible for:**

- Monthly meetings to provide all basic budget information
- Processing all accounting transactions at the request of the Chair or Director
- Reconciling P-Card accounts
- Responding to requests within one business day
- Attending standing meetings with department leaders and staff in order to stay up to date on all department activity (departments and SSC Managers will provide guidance of the meetings that SSC staff should attend)

**YTD Balance by Department**  
For period ending January 31, 2013  
Fiscal Year: 2013

	Annual Budget + C/Fwd	FY 2013 Actuals	FY 2013 Encumbrances	Total Balance	Percent Expended
<b>GU Allocated Funds</b>					
003 Operating Expenditures	5,737,935	3,098,722	-	2,639,213	54.00%
099 General Fees	1,031,705	687,742	9,895	343,963	66.66%
<b>Total GU Allocated Funds</b>	<b>6,769,640</b>	<b>3,786,464</b>	<b>9,895</b>	<b>2,983,176</b>	<b>55.93%</b>
<b>CF Course Fees</b>					
Total CF Course Fees	1,221,897	744,158	6,434	477,739	60.90%
<b>GR Grant Funds</b>					
908 Sponsored Research	-	1,475	-	(1,475)	- %
<b>Total GR Grant Funds</b>	<b>-</b>	<b>1,475</b>	<b>-</b>	<b>(1,475)</b>	<b>- %</b>
<b>CR KUCR Non-Grant Funds</b>					
906 F&A Return	-	496	-	(496)	- %
<b>Total CR KUCR Non-Grant Funds</b>	<b>-</b>	<b>496</b>	<b>-</b>	<b>(496)</b>	<b>- %</b>
<b>RU Revenue Funds</b>					
499 Fee Suspense Fund	-	(85)	-	85	- %
700 Restricted Fees-General	211,417	82,942	12,913	128,475	39.23%
709 Restricted Fees-Fed Stnt Aid	-	11,830	-	(11,830)	- %
<b>Total RU Revenue Funds</b>	<b>211,417</b>	<b>94,487</b>	<b>12,913</b>	<b>116,930</b>	<b>44.69%</b>
<b>Total</b>	<b>8,202,954</b>	<b>4,627,080</b>	<b>29,242</b>	<b>3,575,874</b>	<b>56.41%</b>

The implementation of the BudCast financial reporting system will facilitate shared reports from the SSC to the Chairs on a regular basis.

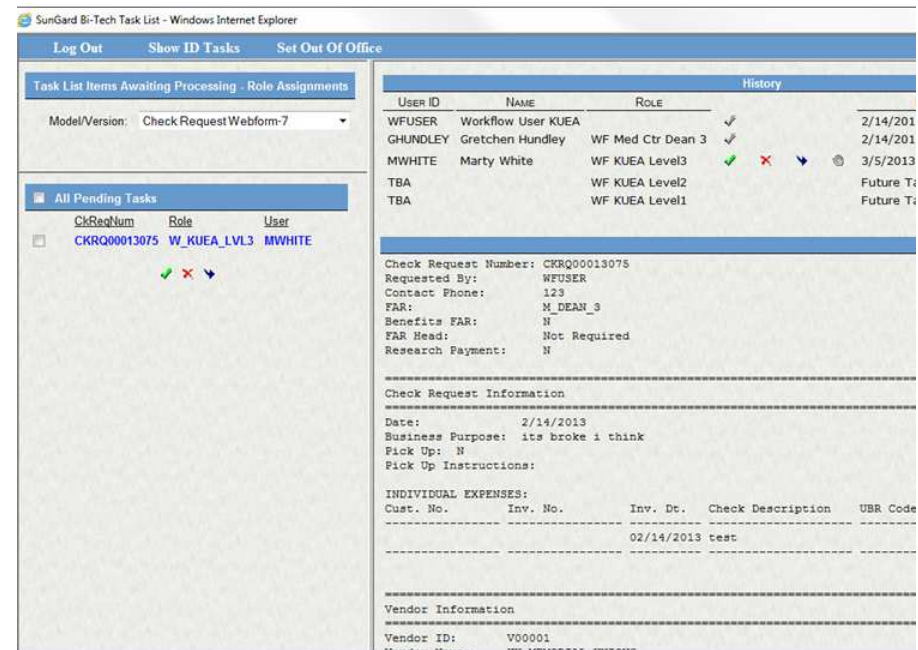


# Process and Roles – KUEA Purchases

The SSC staff will use KUEA's electronic check request workflow (IFAS) to gain your approval for all KUEA purchases.

KUEA's electronic workflow (IFAS) will enable you to approve transactions electronically; paper signatures are no longer required.

Your SSC Accounting Specialist will help you with this transition.



Increased use of the electronic check request offers an opportunity to streamline the work and remove the need to move paper around campus.

# Process and Roles – Purchasing

The “Shopper” Role—determining what is needed—for Purchasing remains in the department.

Role	Actions / Responsibilities	
Shopper – Determines Needs (Department)	<ul style="list-style-type: none"> <li>• Add items to your cart from the Purchasing System (KUPPS)</li> <li>• Assign orders to your SSC Accounting Specialist for processing</li> </ul>	<ul style="list-style-type: none"> <li>• Contact your SSC Accounting Specialist and request items; requests may be specific (a book title), generic (blue pens), or require research (the department requires a new bookshelf, please provide me options that meet a list of requirements)</li> </ul>
Requestor (SSC)	<ul style="list-style-type: none"> <li>• Create orders or carts if needed</li> <li>• No additional approval need for purchases below their designated level (e.g., \$500)</li> <li>• Receive assigned orders and add remaining purchasing information (accounting information, ship to, internal notes etc.)</li> <li>• Must ensure purchase is reasonable, allowable, allocable</li> <li>• Submit orders into workflow</li> </ul>	
Approver (Chair/Director, or a delegate)	<ul style="list-style-type: none"> <li>• Create orders if desired</li> <li>• Receive orders for final approval (via email or in the purchasing system (KUPPS))</li> <li>• Determine if purchases are reasonable, allowable, and allocable to accounts charged</li> <li>• Approve appropriate invoices by logging to the appropriate system, depending on the supplier which the order is through (you will receive an email directing you for each approval)</li> </ul>	

# Process and Roles – Travel and Expense

The travel and expense process requires facilitated communication between travelers and the SSC Accounting Specialists.

Travelers will have the opportunity to use multiple channels of communication:

- Using the travel web form to request that a travel authorization be created and/or travel be booked. The amount of information taken in on this form can range from minimal (please contact me) to information sufficient to book the travel.
- Contacting their SSC staff member via phone or email.
- Visiting their Accounting Specialist at the SSC.

Expense reimbursement can be requested through multiple channels:

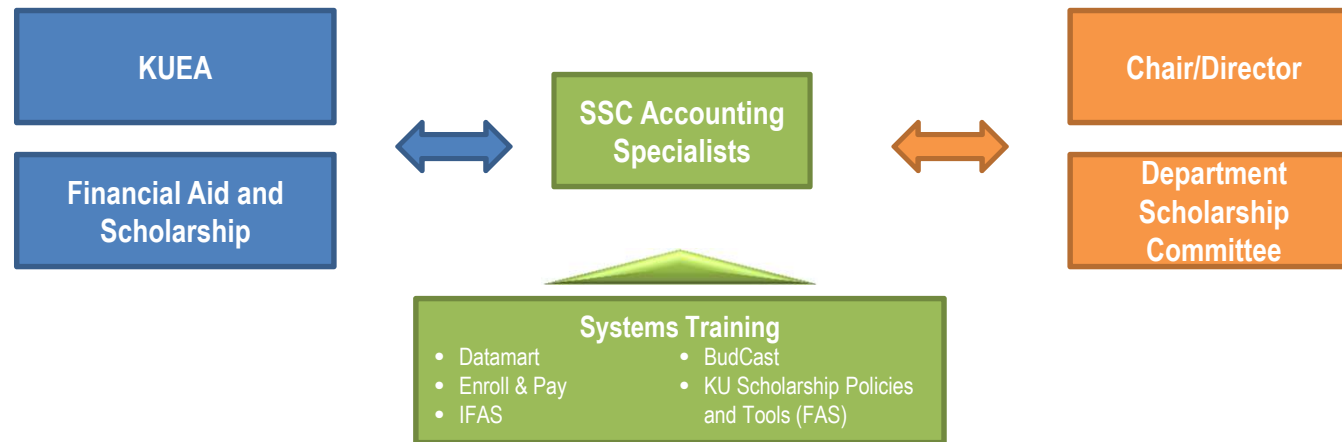
- Scanning receipts and submit with the expense form to the SSC via email.
- Printing the web form, attaching the receipts and placing in the collection box in your building.
- Dropping the receipts and expense form off to your SSC Accounting Specialist.

The screenshot shows the 'Travel Request Form' on the KU Shared Service Centers website. The page header includes 'The University of Kansas' and 'KU Shared Service Centers' with a navigation menu (Home, About, Service Centers, People, Resources). A sidebar on the left lists 'SSC Resources' with links for Travel, Candidate & Honoraria Payments, Procurement, Finance & Budgeting, Human Resources, and Research Administration. The main form area contains fields for 'Traveler Name \*', 'Traveler Email \*', and 'Select your unit \*' (a dropdown menu). Below these is a checkbox labeled 'Please contact me to book travel' and a 'Next' button. A small text block explains that checking the box sends the request to the SSC team for more details.

SSC Accounting Specialists are available to answer any travel related questions, providing guidance on what is allowable based on the funds used.

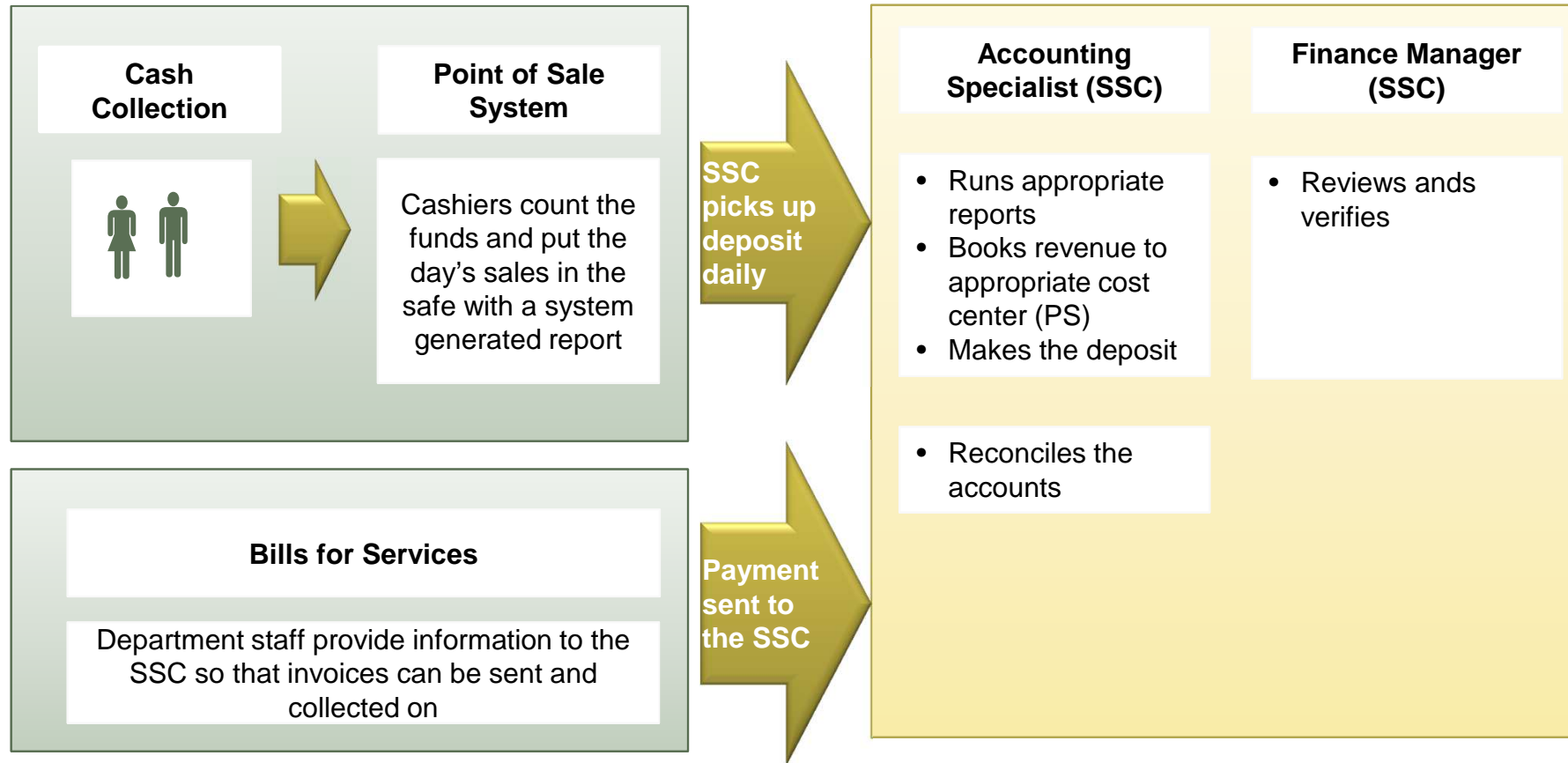
# Process and Roles – Scholarship and Tuition

SSC Accounting Specialists will support the process of awarding scholarships; the decision of who receives discretionary awards remains with the Chair/Director.



- Working to provide Chairs and Directors a single report outlining the commitments already made as well as the funds available to award competitively.
  - Deans, Chairs and Directors to receive the information they need in a single location
  - Better visibility of balances and usage
- Increase training and knowledge of the scholarship tools that exist for finance staff.
- The SSC will support the GTA appointment process; this is being redesigned for next year.

# Process and Roles – Departmental Deposits



The SSC will work closely with each department to make sure there is a process for collecting and processing each department's funds in a timely and appropriate manner.



# Transition Timeframe – Finance Staff

18-Mar	19-Mar	20-Mar	21-Mar	22-Mar
<b>SSC Staff Move to Strong 50</b>  Training: Customer Service DEMIS, Gross and Fringe, UBUD and DEMIS Financials	Training: Datamart and Scholarships	Training: Travel and Expense; KUPPS	Training: SOV, P-Cards	Training: KUEA - IFAS, reports
<b>SSC Accounting Specialists, with support from the Finance Manager, meet with department staff to understand department systems, business processes and Chair/Director preferences</b>				
25-Mar	26-Mar	27-Mar	28-Mar	29-Mar
Training: Excel – Basic	Training: BUDCAST - Expense reports		Training: Enroll and Pay	Training: KUEA - check request process
<b>SSC Accounting Specialists meet with their Chairs and Directors to discuss needs, expectations and communication plans</b>				
1-Apr	2-Apr	3-Apr	4-Apr	5-Apr
	Training: Internal Audit Control Policies		Training: Excel - Advanced	<b>System Access is view-only for department-based staff (KUPPS, Time and Labor Absence Management, IFAS, Datamart, PS Financials, Travel and Expense)</b>  Training: Data Integrity

- It will take time for staff to work with the department staff to fully transition the work that is done in the departments to the SSC. Once complete, system access in the departments will be view only.

# Transition Timeframe – HR Staff

18-Mar	19-Mar	20-Mar	21-Mar	22-Mar
<b>SSC Staff Move to Strong 50</b> Training: Customer Service; Time and Labor Absence Management; Gross and Fringe, UBUD and Funding Reports	Training: TAM Training	Training: Recruitment and Onboarding Shadowing	Training: Recruitment and Onboarding Shadowing	Training: Recruitment and Onboarding Shadowing
<b>SSC HR Program Coordinators meet with department staff to understand department systems, business processes and Chair/Director preferences</b>				
25-Mar	26-Mar	27-Mar	28-Mar	29-Mar
Training: Recruitment and Onboarding Shadowing	Training: Recruitment and Onboarding Shadowing; IOA Training	Training: Recruitment and Onboarding Shadowing	Training: Recruitment and Onboarding Shadowing	
<b>SSC HR Program Coordinators continue meetings with department staff and begin meetings with their Chairs and Directors to discuss needs, expectations and communication plans</b>				
1-Apr	2-Apr	3-Apr	4-Apr	5-Apr
Training: ROC Staff support in SSC - part time	Training: ROC Staff support in SSC - part time; Position Management and CLAS Policies	Training: ROC Staff support in SSC - part time	Training: ROC Staff support in SSC - part time	<b>System Access is view-only for department-based staff (KUPPS, Time and Labor Absence Management, IFAS, Datamart, PS Financials, Travel and Expense)</b>
<b>SSC HR Program Coordinators meet with their Chairs and Directors to discuss needs, expectations and communication plans</b>				

Because each HR staff member serves several departments, it will take longer for department and Chair/Director meetings to occur.

# Resources

Please let others know that we are interested in hearing what they have to say!

- Next meeting: April 25<sup>th</sup> at 1:30 in the Alderson Auditorium of the Kansas Union
- CFE website [www.cfe.ku.edu/ssc/](http://www.cfe.ku.edu/ssc/)
- LAS-SSC website [www.ssc.ku.edu/las](http://www.ssc.ku.edu/las)
- Follow-up contacts:
  - Jason Hornberger: [jfh@ku.edu](mailto:jfh@ku.edu)
  - Nick Stevens: [nickstevens@ku.edu](mailto:nickstevens@ku.edu)
  - Karla Williams: [kkw@ku.edu](mailto:kkw@ku.edu)
  - Megan Cluver: [megancluver@ku.edu](mailto:megancluver@ku.edu)