SHARED SERVICES TEAM
Shared Services
Team Members

**Team Sponsors:**
Kirsten Volpi, *Exec. VP & COO, CFO, Treasurer*
Tom Boyd, *Interim Provost*
Peter Han, *Chief of Staff*

**Team Leader:**
Tressa Ries, *Controller*

**Team Members:**
Tim VanHaverbeke, *Prog. Mgr. and Grad Coordinator, CEE*
Mane Poghosyan, *Fin. Systems Specialist, Controller’s Office*
Ed Zucker, *Client Services Manager, CCIT*
Natalie Vega, *Risk Manager and Dir., Business Ops.*
Janice Lander, *Manager, Payroll Ops., Controller’s Office*
Jeff King, *Assoc. Prof., Metal/Materials Eng., Director, NSEP*
Anna Welscott, *Dir., Business Administration for Operations*
Brenda Chergo, *Project Manager, AA*
Veronica Graves, *Associate Director, HR*
Jennie Kenney, *Dir., Academic Affairs Ops*
Maria Burwell, *Student Serv. Admin./Office Mgr., Metal/Materials Eng.*
Ann Hix, *Benefits Manager, HR*
Tricia Douthit, *Director, Institutional Research*
## Goals of Shared Services

<table>
<thead>
<tr>
<th>Goals</th>
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<tbody>
<tr>
<td><strong>Relieve administrative burden on faculty, staff, and students</strong></td>
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<tr>
<td>Timely, easy, accurate access to business services, data, and information</td>
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<tr>
<td>Create more capacity for departmental staff to perform more value added services</td>
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<tr>
<td>Reduce costs</td>
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<tr>
<td>Improve service quality of business services to faculty, staff, and students</td>
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<td>Improve morale by simplifying business services</td>
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Shared Services Identified by Team

Shared Services
- Create economies of scale, simplify processes, create standards, rely on metrics
- Improve service quality, compliance, policy administration
- Process improvement, ad hoc system support, training and access, reporting and communication

Human Resources/Payroll Operations
- Recruiting Support
- Onboarding Support
- HR Benefits Administration
- HR Transactions/Forms
- Payroll Transactions
- Other HR Processes
- Travel transitioning 2018
- OneCard Administration 2018
- Accounts Payable Transactions
- Finance Transactions

Finance/Travel/Accounts Payable
- Procurement Transactions
- Contract Administration

Procurement
- Website Updates
- Internal Report Writing/Data Analytics
- Non-Academic Room Reservations
- CashNET StoreFront Administration
- CashNET Deposit Administration

Business Services
- Internal Report Writing/Data Analytics
- Non-Academic Room Reservations
- CashNET StoreFront Administration
- CashNET Deposit Administration
## Finance- Travel and Expense Management

<table>
<thead>
<tr>
<th>Unit</th>
<th>Central</th>
<th>Shared Services</th>
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</thead>
</table>
| ➢ Provide receipts and business purpose of expenses for travel and non-travel  
➢ Provide funding source  
➢ Review and approve travel pre-approvals and/or expense allocations  
➢ Provide necessary information for travel pre-approval | ➢ Sets policies and procedures  
➢ Granting exceptions for policies and procedures | ➢ Prepare travel pre-approval reports  
➢ Prepare travel and non-travel expense reports  
➢ Perform OneCard reconciliation  
➢ T&E System Maintenance (user setup, etc.)  
➢ Approval of pre-approval and expense reports  
➢ Ghost card allocations  
➢ Obtain additional approval and issue one card and maintenance  
➢ Train on use of one card and T&E system  
➢ Cash advance monitoring  
➢ Make travel arrangements as needed  
➢ Walk in's/Emails/Phone Inquiries |
## Shared Services Finance Functions
*Identified by Team*

### Finance- OneCard

<table>
<thead>
<tr>
<th>Unit</th>
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<tbody>
<tr>
<td>- Apply and get approval for one card</td>
<td>- Set purchasing guidelines and policies</td>
<td>- Perform OneCard allocations for cardholders, as requested</td>
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<tr>
<td>- Identify the need to buy a good or service</td>
<td>- Final approval of monthly reconciliations (following SS audit)</td>
<td>- Obtain additional approval and issue OneCard and maintenance</td>
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<tr>
<td>- Define service and scope</td>
<td>- Approval of vouchers over $10,000</td>
<td>- Initial reconciliation of weekly and monthly credit card payments</td>
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<tr>
<td>- Specify item and value</td>
<td></td>
<td>- Secondary review of reconciliation</td>
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<tr>
<td>- If using federal grant funding, provide three quotes for purchases</td>
<td></td>
<td>- Prepares voucher for A/P</td>
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<tr>
<td>over $3,500</td>
<td></td>
<td>- International notifications on OneCards when traveling internationally</td>
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<tr>
<td>- Department head determines spending thresholds, exceptions</td>
<td></td>
<td>- Holds on accounts for cards with fraud</td>
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<tr>
<td>- Make One-card purchases for purchases under $4,500 ($5,000)</td>
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<td>- Setting up employees in banking system to receive OneCard</td>
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<tr>
<td>- Initiate contacting credit card company and shared services when</td>
<td></td>
<td>- Approval of vouchers less than $10,000</td>
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<tr>
<td>notified of fraud</td>
<td></td>
<td>- Train on use of OneCard</td>
</tr>
<tr>
<td>- Provide receipts for purchases over $50</td>
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<td>- Provide OneCard to employees</td>
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Questions? Comments? Suggestions?